ServiceTrade Demo with Independent Mechanical Contractors Inc

Brett Griffith with Independent Mechanical Contractors Inc
Recorded on 10/19/23 via Zoom, 1 hour 9 min.

Participants

SERVICETRADE

Brett Griffith
Territory Manager

INDEPENDENT MECHANICAL CONTRACTORS INC

Trish McGeoghean
President & Chief Executive Officer

Samuel Yuan
Project Manager

OTHER

Tim

Topics

Transcript

BRETT

0:00 Hey, Sam. How you doing?

SAMUEL

0:02 Hey, Brett. How are you?

BRETT

0:03 Good. Hanging in there. Thanks for joining me today, guys.

SAMUEL

0:06 No problem. Tim and Trish, should be joining on another stream separately in a second.

BRETT

0:12 Has has worked slow down a little bit. Have a chance.

SAMUEL

0:15 No, it's tiny bit.

BRETT

0:17 Okay. We'll take...

SAMUEL

0:19 It, right? Getting caught up.

BRETT

0:21 Good. So I'll wait for them to connect to audio before we get started here.

BRETT

0:44 Remind me what you guys are in Massachusetts, right? Yep. What's the city?

SAMUEL

0:50 We'll go.

TRISH

0:53 Okay. Let me try that, right?

SAMUEL

1:03 Yeah, I think with Tim here today, he hasn't seen, he didn't get to see that first demo that we did. So I think it'd be really helpful if you're able to run us through that same car we did last time, where we kinda go through start to finish, where we receive a service call.

--- *Parts management (purchase orders)* ---

SAMUEL

1:21 The service call is taken, those parts are ordered or picked up and applied to the work order and kinda kind of process from start to finish up like one service call.

BRETT

1:32 Yeah. Have you, I know last time I wrote notes about it, I know you guys don't have a dispatcher, technicians are creating their own tickets, but we run into that whole issue as far as applying the parts to a job, but job needs to be there. Have you thought about that process at all?

--- *Paper process* ---

SAMUEL

1:52 Yeah. So we're still in the process of getting a dispatcher, we do expect to have one hopefully in the next few months or so. We had one guy that we were hoping to have as a dispatcher, but I think he backed out. So to the drawing table on that.

--- *Paper process ends* ---

SAMUEL

2:11 So as of right now, we would still be doing well. I mean, assuming that we wouldn't be hooked on until next here. I mean, I think we could, I'll be finding dispatch by then, but we still want the ability for the technicians to obviously be able to create the job because a lot of the work that we do here is emergency work that happens after hours and we can't always depend on a dispatcher to be able to dispatch a technician and create a work order from the office at 11 PM or two a. M or stuff like that. Some stuff just comes up in the middle of the night and the guy has to go out there and he has to obviously create his work order still.

BRETT

2:52 Yeah. Okay. Yeah. I like you saw last time, you know, technician creating the work order definitely possible. That said probably not the best practice for all your jobs just with the way the system is set up. You're probably not going to get the most value out. So, I'm really glad to hear you guys are, you know, in the process of hiring a dispatcher, yeah, we'll do exactly that. Like you said, receiving the call, adding the parts to it and.

SAMUEL

3:16 I don't know why it says Tim is gonna go this. He's not even in the computer hold on there. There. The other office I need, to get on. Well, I...

BRETT

3:22 Got.

BRETT

4:23 There we go. Trish. Can you hear me? Awesome. How are you guys doing today? Okay? Is good to hear. Is Tim with you in the room?

TRISH

4:34 He is, he's in Rico?

BRETT

4:38 Cool. So, welcome guys. My name is Brett Griffith. I'm the inside territory manager here at ServiceTrade for the northeast.

--- Purchase decision ---

BRETT

4:45 I've had a chance to talk with Sam quite a bit... and my understanding is you guys haven't seen ServiceTrade yet. So, you wanna see it? Of course, we'll go through that today. Prior to us getting there. I do just wanna kinda reassess where we're at. I know you guys bought BuildOps, but you're still using ServiceFusion that's still the case?

SAMUEL

5:04 Yes.

BRETT

5:05 Okay. And the reason you didn't implement BuildOps was because you had some hiccups and then you got into your busy season?

SAMUEL

5:13 That's correct?

BRETT

5:14 Okay. So, I guess... are those hiccups with build up enough to make you guys go a different direction or you just looking around like where's your head at?

--- Accounting integrations ---

SAMUEL

5:25 That's a tricky question. We obviously put it on hold. I pause the implementation process because we had some doubts about it that came up. And then we got your name because I think one of our service technicians, our newer, one of our newer technicians says that he used to use your platform, backed out another company that he used to work for and recommended it to us. And that's kind of what opened up the door for us to reevaluate our situation and.

--- *Purchase decision* ---

TRISH

6:00 So, to answer the short answer to your question is, yes, the hiccups are enough for us to change directions.

BRETT

6:08 OSHA. Yeah, you're right? That's what I was looking for. Obviously, I'm not here to waste your guy's time. So last time we talked, it sounds like, you know, asset tracking was a big thing.

--- *Parts management (inventory)* ---

BRETT

6:18 POS and inventory were big. I will preface today's meeting. I will show you guys the po side of it today. If we wanna go over inventory, that's not my specialty. We have someone else that covers that whole goal of today being if you like service trade, we'll talk about it.

--- *Paper process* ---

BRETT

6:34 But some other things were... headaches from day to day. Service. Visibility was lacking, lots of duplicate entries specifically for you, Trish. What else specifically are you guys trying to improve that? You know, I haven't mentioned yet?

SAMUEL

6:51 We just really want a good backbone to our business so that we have the opportunity to not only grow but also kinda minimize how much work is done in the office to maintain our current workforce right now.

--- *Type of work* ---

TRISH

7:07 About efficiency. Really there's just the current infrastructure was designed when we were much smaller and as we grow, it's just not capable of handling it. There's just a, there's way too much data entry involved. We, we need more automation.

BRETT

7:27 Got. It. Makes sense. Typically what we hear from companies that go with ServiceFusion.

--- *Purchase decision* ---

BRETT

7:31 It's it's great when you get started, but you guys are too big now that's expected. So I'm glad you're here. Do you guys have a time line that you're looking to get something rolling? Is it just looking right now?

SAMUEL

7:45 I think targets still January first 2024...

BRETT

7:48 Okay. I will be extremely transparent with you guys throughout the process. It's borderline impossible to get you live then. Cool. And then, is there anyone else aside from Tim, Trish and you, Sam that we need to get involved in this process?

SAMUEL

8:04 No, it just be us three.

BRETT

8:06 Gotcha. Okay. Cool. Do you guys have any questions for me prior to get?

--- *Purchase decision ends* ---

SAMUEL

8:12 Are... there many new updates or new features added since we last spoke or is it pretty much so the same?

BRETT

8:22 Pretty much still the same. I don't know if you were aware of Northboundary, when we were talking. Basically, Northboundary, is a company that ServiceTrade bought a few months ago. They're an entire sales CRM specifically made for the H or mechanical industry. Basically, it's a way for like you guys to have non skilled reps go build out a PM proposal. It's got all the tasking built into the system for your specific industry. All that said, do you guys use any kind of sales tool?

--- *Parts management (inventory)* ---

SAMUEL

8:54 Not at the moment.

TRISH

8:56 Okay.

BRETT

8:58 Yeah. If, if you guys like what you see again with ServiceTrade, we can cover Northboundary... and it's really meant to be, it's an end solution. So, we touch the sales side of it, sell the agreement, service trade, manages the agreement. We can manage your POS and inventory and partsledger.

--- Parts management (inventory) ends ---

BRETT

9:15 I'm saying all this because yes, we do have multiple products. All of them are intertwined. Seamlessly. Basically, we set it up as if you come to me and you have a specific need, you shouldn't be required to purchase everything that's why they are kinda separated. Like I said, everything's streamlined and connected if you want it to be.

TRISH

9:34 Okay. Square.

BRETT

9:38 Here. And Trish, you were on our first meeting correct?

TRISH

9:42 Yes, I was. Yeah, yeah.

BRETT

9:44 Have you guys told Tim anything about service trade? Just that, hey, you need to look at this?

TRISH

9:49 That's well, so, you know, his role is, he's minimally involved with it. He is, you know, in the field a little bit. So he does use it a very small amount and is hoping to not have to do that in the future. So, he's really just looking at a big picture here and how, you know, he's looking at it from a business perspective versus a user perspective at this point?

BRETT

10:18 Makes sense. And Trish, and TAM, you guys are owners, right?

TRISH

10:21 Yes.

BRETT

10:23 That tracks. Okay, cool. Well, I'll touch a little bit on the day to day. I'll touch on how this is gonna affect your guys business long term. I'm glad you guys mentioned growth. A majority of our customers joining on the service trade. They're on the mechanical side. They're seeing about 37 percent year over year in growth just by fixing, their systems being more efficient. So I'm sure you guys will see that as I get through it today. Last thing I'll say before I get started, if you guys do have questions, interrupt me. This is your time. I'm just here to be a resource for you guys. So prior to us getting into dispatching a call, I kinda want to set the stage here. The first thing that you guys will see in service trade is the service dashboard, which is really giving you all in the office visibility into what's going on. So you do have a daily schedule, a quick glance at where your text are going. Who the physical tech on the job is and what locations you guys are going to for the day. But, this page is also going to give you guys the status of all your different work orders. So if you do have anything overdue service trade is going to ensure that you guys don't miss an opportunity to deliver revenue or collect revenue from your customer. Excuse me. So those overdue PMS, overdue service calls, etcetera. We also have jobs appointments doing the next two weeks. Inevitably everything's going to be overdue at some point. So I'll letting you know two weeks ahead of time before it's overdue. And before your customers, Matt, you... ask jobs to be marked, complete the whole service trade kind of workflow allows your technicians to do what they need to do in the field, get in, get out and do high quality work.

--- Tech On-site ---

BRETT

11:51 But all that information typically comes back to the office in which you guys have a system of checks and balances to review everything, make sure what your technician wrote down is correct before we send it to the customer at that's what this bucket is here. So when technicians do complete that work order, this is the status it falls into.

--- Invoicing ---

BRETT

12:07 Then lastly you're complete the job to be invoiced. So customers can pay, you guys be a service trade, little pay now button. You guys can also push the invoices over to Quickbooks and continue billing like you guys are today. Totally up to you. I will say the customers that are utilizing service rates invoice are typically decreasing their days outstanding by about 15 to 20 days.

--- Tech On-site ---

BRETT

12:29 Also on this page, you will see tech location. This is based off your technicians, mobile device, not his or her truck. So you'll see when that technician makes a clock event, whether it be en route on site or in job prep. That's really just telling you where they were when they made that clock event.

--- Accounting integrations ---

BRETT

12:43 So if you guys use any kind of fleet tracking software because insurance reasons, et cetera. I would continue using that.

BRETT

12:52 And then lastly, offices, this is just a way for you guys to filter out your service trade account. I know there's a lot of people within your business.

--- Accounting integrations ends ---

BRETT

12:59 If different people need to see different things. This is what they would use. So offices does not have to be an individual brick and mortar offices. It can just be different divisions within your company, for example, the heating office, the cooling office, so on. But you can also filter out by job type or by service line. I just note this is the demo account. So I've got a lot of information in here. You guys are going to cater this specifically towards what you guys do. So you're probably not gonna see five year sprinkler, in your account, for example. Any questions on this main page?

TRISH

13:32 No, I.

BRETT

13:35 So I'll take you over to the location page really gonna follow, the, or show you the data model service trade follows. So we are built specifically for commercial and industrial contractors. We do not work with residential contractors, and we only work with fire protection and mechanical contractors.

--- Recurring maintenance ---

BRETT

13:48 So no pest control landscaping, anything like that. Just kill contractors. So in this instance, here's our Bill to excel or core under excels corp. I might manage three locations. I might manage 300 locations, but this is just how we're going to manage it inside of service trade. So today, we're working specifically at comcast center, my ship to same as my contact, my primary contact at this location. So any invoices quotes go to him. So this is the work that you guys are actually delivering to your customers. So whether it is repairing an efficiency like this view you see at the top or it is your recurring work, take this one. For example, what I have highlighted is going to be your guys verbiage inside of your service trade account. If it's a PM, you know, what you're doing already, the service call you'll put it in when you physically make that call with services and service trade, we will set these up on the recurring basis that you guys go out quarterly, semi, annual, whatever it needs to be.

--- Assets ---

BRETT

14:43 But with that, we'll take it a step further and we'll tie them to the individual assets or pieces of customer equipment that you guys are working on. That's helping our customers gain really Rich service history not only for the text in the field but for the office as well to know what you're getting into prior to going out as well as your customers. They wanna see what you did to their pieces of equipment.

--- Recurring maintenance ---

BRETT

15:04 And then by setting those up on a recurring basis, you guys need to go out service trade or mind you, hey, you have 30 PMS due this month. We do have, the concept of recurring invoices. So if you guys do have a lot of customers under contract and you want to send those invoices out on a recurring basis, they can go out, you know, first of the month, whatever basis they need to go out.

--- Assets ---

BRETT

15:28 Jobs in service trade is essentially every single work order. So each work order has a number, you can see a quick preview of what went on these jobs. But if you do need to go find more information on, I simply click the job. Everything's hyperlinked here. Assets are those pieces of customer equipment. So as you can see, I can get really granular with the information I keep here. Take my hvac unit on rooftop unit three. I have a ton of information on root. Top two. I really don't it's up to you guys, the amount of information that you put in here. Like I said, this is that service history piece that I can click on this and see every job we've ever done, every deficiency, every quote, and what we're expected to do the do to this in the future. Excuse me… questions so far?

TRISH

16:14 Nope.

BRETT

16:17 On the location page, yes, we'll see all the deficiencies at this location.

--- ST app contracts and pricing ---

BRETT

16:20 All the quotes we recommend going down to the asset level just to get really granular with it. The last thing I'll point out is contracts and service trade essentially to your different pricing structures and our markup rules, each customer is gonna have a contract. If they don't have a customer specific contract, you're going to have a default that applies to them.

--- ST app contracts and pricing ends ---

BRETT

16:39 But this is just to make sure that you guys aren't doing any of the math when it does come to mark up rules when sending a quote, sending an invoice, et cetera.

BRETT

16:51 So, Sam told me what we wanna do today, and you guys don't have any questions, I'm gonna go straight into the dispatch board and actually dispatch a call to my technician.

--- *Access to information* ---

BRETT

17:01 I will be your technician in the field. You guys will see the mobile app. I'll close that out. I'll invoice it. I'll do everything. And you guys will also see the customer view today. And like I said, interrupt me if you guys need to see anything additional.

TRISH

17:12 You're just gonna take us through a typical call from start to finish invoice.

--- *Access to information ends* ---

BRETT

17:19 Yes, ma'am, correct? And to confirm that your technicians are.

TRISH

17:24 Are they, are they invoicing on site? No? Okay. Good.

BRETT

17:30 All right. Great answer. Couldn't gonna answer better myself. Okay? So, yeah, that's exactly what we'll do. Trish. So, where I'm gonna start today is on the dispatch board. Call comes in. Let's take care.

TRISH

17:43 And you the?

BRETT

17:50 I'm sorry, but.

BRETT

17:56 Was that for me?

TRISH

18:01 I didn't say anything.

BRETT

18:03 Okay. Maybe I'm just hearing things that's good. Anyway, let's get into it. So here's the dispatch board guys, just to explain it a little bit here's. Your technicians on the left hand side. We can break it up into those offices we mentioned earlier. If you guys want. This is me, this is my swim Lane horizontally across the screen. So you can see all the jobs that I'm going to. You guys will always have available jobs to get done. They'll be broken up into the job type. And so you can see, you know, I have a service call, some Installation, some PMS. And really the purpose of this is you guys just drag and dropping it to whatever technician you want to send. But in this instance, we're gonna take a call. So I'm gonna go at a job. I'm gonna say comcast center called me. Well, all the comcast centers information is in straight already, for example, Sam's information. We say this is a service call. I have no heat and I am cold. So we're going to go out today. It's about 115. So hey, mr, customer, I can be to you by two 30 if you know who that technician is that you guys are gonna send.

--- Assets ---

BRETT

19:02 Great. Pick them here. If not leave it blank. I'm gonna leave it blank on purpose so I can show you something. The assets of service is the piece of equipment you guys are working on. If the service call, they have no heat, your customer probably has no idea. So you're gonna just fall to the building and let your technician figure out the equipment when he gets on site. Service line is just the type of work you guys are doing description. I'm gonna tell my technician to fix it. You guys will probably be a lot more granular than me or a lot more detailed than me with the information you're putting in here, we save this call in.

--- Assets ends ---

BRETT

19:33 And remember how I did not apply a technician to it. The reason for that is those jobs, follow up into these unassigned this unassigned folder essentially a queue of jobs that you guys need to schedule. I understand the middle of the summer, you guys are taking calls left and right? You don't have time to schedule those calls. So take all the calls in and just get them in this status. And when your dispatcher does have time that's when you can figure out what technicians are going. So in this instance, I'll drag it and drop it down to myself.

--- Access to information ---

BRETT

19:57 We're going to contact center at 215. So from here, let me share my iPad real quick service. Trade is compatible with iOS and android devices, whatever you guys wanna use there that's fine. What are they using today?

SAMUEL

20:12 Everything is, IOS, iphones and ipads.

BRETT

20:16 Beautiful. Okay. So it'll look exactly like you guys are gonna see today.

--- *Tech On-site* ---

BRETT

20:21 First thing I do, let me refresh this. I've got a couple of jobs on here. So we're working on the note, a service call that I've just scheduled for us. I'm gonna click into this. First thing your technician might do is clock in. He can clock in on site. He can clock in and route or he can clock in for job prep. So, let's say he's driving there. Maybe he wants to notify his customer that he's on the way. I can do so right here. And Sam, I'll send you a copy of what that looks like.

--- *Tech time tracking* ---

BRETT

20:49 Now, I drove really fast. I'm on site, clock out of end, route, clock in on site. This is tracking my hours in the background. There's nothing more that I have to do. However I remember, are you guys a union shop?

SAMUEL

21:01 Yes.

BRETT

21:02 Okay. So you can't use packets, right?

SAMUEL

21:05 We can't use what?

BRETT

21:06 Are are you able to use clock events? Are you able to track your text time in that manner?

SAMUEL

21:11 We don't right now.

BRETT

21:13 Okay. And you want to keep it that way?

SAMUEL

21:19 Yeah, I...

TRISH

21:21 The problem we have is the guys will not, they will not do this. They will not take the time to clock in and then they would write on their master time sheet that they were working three hours at concast when they might only have two hours on their GPS or they don't always match up what they.

BRETT

21:41 Yeah.

TRISH

21:43 Well, they forget to log in, they'll be on site but if they don't log in, you able to edit that?

BRETT

21:51 Yes, you are able to edit that. And I'm thinking, if you guys want to keep it consistent with not doing the clock events because you think it might be too much extra effort for your text, that's fine. Don't use clock events. We can just do it in a manner of late job items. Excuse me, so I can come in here. Your technicians wanna get paid. So they're gonna come in and put their time in so I can come in and say labor.

TRISH

22:14 I want it.

BRETT

22:15 Hang on... line, Manning, labor right here. Hey, I work three hours on this job, quantity three. And I added in, do you think that Tim would be an easier way for your technicians to?

--- *Tech time tracking ends* ---

TRISH

22:25 Yeah. This is what they do when they're finishing up the call. This is what they do. We need a system where they're not allowed to submit their weekly time until all of their past service invoices are completed. We need to hold them accountable. What happens is they fill out the master sheet, but we don't get the service invoices.

--- *Paper process* ---

BRETT

22:46 And if I'm remembering correctly, texts aren't necessarily filling out their work orders while they're on site, they're doing it after the.

TRISH

22:52 Yeah, I do a week later. Trying to remember what he did is we need to have a system that like the, you want, they're forced to do it in real time. They're being paid based on this?

BRETT

23:05 Yeah, I...

SAMUEL

23:07 Would that, would it make more sense for us to try and implement the?

TRISH

23:10 Clock in clock out?

SAMUEL

23:11 I mean, when you clock in clock out, is, are they able say we have a three hour minimum in? They're only clocked in and clocked out for one hour. How, how does that translate?

BRETT

23:22 You guys, I mean, you know, that you have a three hour minimum, you're reviewing all this when it comes back to the office. So, if you was only clocked in for an hour, you're adjusting the invoice to say three hours.

SAMUEL

23:32 But the technician is also going to expect you get paid for the three hours even though he's on site for one.

BRETT

23:37 Yeah, that's correct?

TRISH

23:38 So, you slip in the office yep.

BRETT

23:42 Just in the office technician is going to get his three hours. Customer is gonna get billed for the three hours, but you will have the documentation saying my tech was only on site for an hour.

BRETT

23:55 That...

SAMUEL

23:55 This is the only alternative to if we chose not to do the clock in clock, I would say they get used to doing the work and then going home and then trying to create the

slip once they get home, this is the only alternative is they have to type in a line item called labor and add it in essential.

BRETT

24:13 If you, if you want them to track time and service straight?

SAMUEL

24:16 Okay. And this will also equate to their weekly... time sheet, right? These are the okay, that's fine.

BRETT

24:26 I would encourage you guys to, I mean, I understand technicians going home, filling out the paperwork, they're probably not getting the most accurate information though. Is it, is it just, they're not listening to?

--- Tech On-site ---

TRISH

24:36 Do, you have to be, to get the network sent in case it needs to change? We need something that are forced to do it in real time?

SAMUEL

24:46 Well, that'll be the pain tack out, but.

BRETT

24:49 Exactly. And you essentially in service trade, you can set it up in a way where you can't clock out until the work is done, but you, it would require you guys using those clock events and enforcing that in the office.

SAMUEL

25:01 Well, what would happen if they clocked in and forgot to clock out?

BRETT

25:05 Office is going to get notified.

SAMUEL

25:08 And then we'd be able to edit it after the fact. Yes. Yeah. So it all comes down to having someone in the office to edit things as it comes, which we had a dispatch or a service manager just in charge of the.

--- Tech time tracking ---

TRISH

25:20 You see everybody, does everybody do the force technicians to clock in and clock out to mostly your clients do?

BRETT

25:30 The non union shops are doing clock events. A lot of union shops are using labor items like I'm showing you right here because a lot of their unions don't allow clock event. It's it's toss up who uses what?

--- *Paper process* ---

TRISH

25:42 Okay.

SAMUEL

25:45 But either way, they're Tim, if they don't fill the time sheet is populated with this information. So basically, this system gets rid of the whole paper time sheet. It's everything's gonna get filled in based on these.

TRISH

26:00 Exactly. We don't want.

SAMUEL

26:01 They won't get paid that week. If they don't do the work orders.

--- *Paper process ends* ---

BRETT

26:05 That's what my customers are doing. They're saying put fricking time in or you're not getting a check?

TRISH

26:10 Yeah, usually more basic.

BRETT

26:12 Exactly. Okay. So, I'm gonna add both these on here. We'll continue the clock event and you guys will see what that looks like. When we get back to the office... on the physical work order here, your technicians are going to be all over this because this is telling them what they're doing on site.

--- *Deficiencies* ---

BRETT

26:28 So they come up into services. They see there's that fix a description. I put in. When I dispatch this call out. Again. Like I said, it's gonna be a lot more descriptive

in your guys real world. And on my demo that they're gonna see what they're doing and what the issue is. If that technician does need to come in and take pictures, videos, audio recordings that's possible here under attachments. A lot of our current customers like to come in and take before and after, so they can show their customer the work, they did tell the story.

--- Quote templates ---

BRETT

26:59 Talked about those job items, but that's similar with you saw me add labor. If they need to add parts, this is where they're gonna do so they can either.

TRISH

27:08 Is where we have our biggest problem.

BRETT

27:11 Tell me about.

TRISH

27:12 It. So they're on a service call, they need a car.

--- Parts management (purchase orders) ---

TRISH

27:19 They go, they buy, we may or may not get the po back in the office to tell us what to do with it. And then, you know, it could be that we already build out this labor. And then they've decided to give us the po and already sent out the Bill for the labor. Matching up parts with labor. Has been a real challenge.

BRETT

27:42 Would you guys be okay with the technician creating the po, not physically cutting it out? That way the po comes back to the office every single time, you guys know what they're ordering and the office physically submitting the po to the vendor?

SAMUEL

27:55 No, they would need to be able to have the PO, at the supply house. They can't wait for an office approval every single time.

--- Parts management (inventory) ---

TRISH

28:02 It could be at the service call. And right now, they're driving down the street to get what they need for a part. And they, we need to know what's happening with that part.

SAMUEL

28:11 And that's what port part later I think comes into play. Yeah.

BRETT

28:14 You're right? And here's what I'm thinking, let me show you. So, TAM remembered our product that manages POS and inventory is called partsledger. I go right here, open partsledger.

BRETT

28:29 Brings me into this page right here. This is your technicians homepage. They can go in and real quick. Are you guys keeping inventory in house?

SAMUEL

28:36 Yes.

BRETT

28:38 Hello?

TRISH

28:39 In more tracking?

SAMUEL

28:43 Both both. Yeah. So scubby both.

TRISH

28:47 Well, we...

BRETT

28:49 Sounds like you have inventory in stock, but you don't have the best way of tracking.

TRISH

28:53 We...

SAMUEL

28:53 Have no way of tracking it.

BRETT

28:55 Got it. That's where part other comes into play that's that other meeting that we need to have to get really into the nitty gritty around inventory. This right here. What I'm showing you is the side for the technician. So what your technician can physically do is he can do a stock look up and say, let me see where these gaskets are. Look. I

got 16 handhold gaskets on truck one, seven on truck two, 220 at the main warehouse. They have that kind of visibility from the field or when they're loading their truck for the week so they can see where to pull things from. But if it is the instance, if we do not have this part and I need to generate a po, we're gonna go right here.

--- Parts management (purchase orders) ---

BRETT

29:30 Job number pulls over from my service trade account. So I don't have to reenter this information in... technicians can only order from a list of suppliers that you guys choose from. So if I go to put in home depot here and home depot is not in here, they can't order from there. So we will have all your vendors in. We'll say acme supplies and we'll create this po. Basically technicians can come in and put a message in if they need to tell you guys what the parts for. Hey, I had this part, but I need another one because it's broken, whatever it is. And then this is where I physically put the parts that I need in. So I'm gonna grab this wire.

TRISH

30:07 Grab one of each one.

BRETT

30:09 Add this to the po. Real simple for your technician to do that. When he finalize the po right here, it's gonna give him that po number that he can give to the vendor. Right at the top. You guys are also going to get notified in the office. Your technician just created a po. So you're going to have that po there's. No more chasing it down. Technician gets the parts. We know what our technician did. If he needs to e-mail anyone additional he can do. So right here, maybe Sam doesn't get the e-mail about the po, but Sam needs to know about this job specifically. Great. He gets an e-mail technician can also take pictures. What am I physically ordering? So the office is aware of it at this point? They hit done, po is created. This is all gonna flow back into the office and I'll show you how that works for me to get back there. But that process you guys just saw you think your technicians can adopt that and will that work for your work?

SAMUEL

30:57 Flows, it'll work with the exception of... the add line item for each item that's probably okay for simple things or when they're just picking up one or two things. But there's going to be times where... they're picking up a lot of things or I find another issue where if I send a truck driver out to go pick up stock... how is the truck driver going to know what the job number is and tie that po back to the service technician that's on the job site?

--- Access to information ---

BRETT

31:41 It sounds like the truck driver would need a license so he can have visibility into that... and we can give them a helper license, which is half price just to have the visibility to know what jobs actually scratch that give your driver access to the office

so he can see what job are these parts that I'm picking up, applied to, and then he can take them there.

SAMUEL

32:03 Okay. Yeah. We'll have to kinda think about how, that would work outward?

BRETT

32:08 Yeah. I'll write that in my notes for when we cover partsledger in detail because Adam might have a better answer there. As far as the creating multiple items. I have a solution for that. And it's if you're doing a big job that has a lot of items, you know, what you're using on that job, right?

--- *Parts management (purchase orders)* ---

SAMUEL

32:25 In a sense...

BRETT

32:29 What our customers do is you guys would put those items on the job when the dispatcher dispatches it out. And that way when your technician comes into partsledger here, so.

TRISH

32:39 You...

BRETT

32:40 Again... so yes, I can create a new item or I can just add an existing item. In this instance, I don't have any items on here. But if you guys already had your items on the physical work order, everything's going to be here. All they're going to have to do is select all and it's a.

TRISH

32:54 Would that be in case, Sam, where, you know, you ordered something and they'll just be able to find it there?

SAMUEL

33:02 Yeah. So any stuff that I ordered would hopefully be here... but they would also have to be tied to that work order. So basically, I have to create the job. When any time I place an order for any sort of parts with the po, I have to create a job to tie the parts to right away.

BRETT

33:26 Correct. And that's the issue we ran into last time on our last meeting because you guys were not creating the job first and we had no where to tie the parts to.

SAMUEL

33:33 Yeah. In a perfect world, I would love to see a system where I could create POS to a specific customer. And then any time a technician is out in the field working for that customer, they could see the list of open POS for that customer, not by the job, but.

BRETT

33:54 Gotcha.

SAMUEL

33:54 Obviously, I know there's no one out there that really does that at the moment. It's just tied to specific job numbers and creating the job before I.

--- *Parts management (purchase orders) ends* ---

BRETT

34:03 Yeah. We're trying to solve that problem.

SAMUEL

34:05 Yeah.

BRETT

34:06 Of the parts come from, yeah, I don't believe we can do it to the physical customer. I can ask Adam and I can ask him to cover that on our next meeting. If there's a workaround or something we can do there, but.

--- *Parts management (inventory)* ---

SAMUEL

34:19 What would happen here? If, if we go back to the other tab where we create a new item? Say a technician goes out, he buys a bunch of different sized copper piping, say, he buys some three, eight, some half inch, some five, eight, some seven, eight, some inch, an eighth. And he only types in one item. Does that screw everything up?

--- *Parts management (purchase orders)* ---

BRETT

34:39 It doesn't screw everything up but it's not as granular as it could be. Like, you can go pick everything up, but you're just gonna know you have a bunch of copper pipe, you're not gonna know what size you have.

SAMUEL

34:51 Which is fine as long as because when we go to do the invoicing, obviously, when the invoice comes in from the vendor, it will still get tied to the po.

--- *Parts management (inventory)* ---

SAMUEL

35:00 So, someone in the office, our bookkeeper will be able to edit everything and make it match up to what was actually purchased. As long as we have that capability, it should be fine because there's a lot of time. Even I'll just write one like line in like miscellaneous fittings, and it'll be a whole, but I'm not gonna take the time to write out every single fitting on that work order.

--- *Parts management (inventory) ends* ---

BRETT

35:28 Yeah. Now, knowing that you're okay with doing that, a lot of our customers, do they'll say box of stuff 3,000 dollars. And then in the back end, they don't want to waste their technicians time typing out all out.

SAMUEL

35:37 Okay.

BRETT

35:38 And I'll take care of it that's possible.

SAMUEL

35:39 Yeah. If they're picking up like 10 different sized filters and they just write one item filter as long as we have the capability down the road, once invoice comes in, we see all the different filters to update everything, then, yeah, that's fine. That's not really a big deal.

--- *Assets* ---

BRETT

35:54 Okay. And I'm keeping a list of things we got to show you on partsledger, so keep them coming.

BRETT

36:05 All right. A couple of other things from the mobile app. So here in their assets, guys, I talked a little bit of assets from the office. You saw the kind of visibility that you guys could get into technicians also have that they're the ones that are physically working on these pieces of equipment on site. They need to see what happened last time. What are the deficiencies we ran into? And so in this instance, I'm gonna go grab rooftop unit three. Here's. All the information I know about rooptop unit three. If I need to change it, I can do so just by hitting this edit button. But this is where

your technicians have full visibility into service history because every single work order I've done a contact center, what job type it was. And if I need to click into these, for example, the startup, see what was done. I have full visibility into that previous work order. So I can see any comments made. If I took any pictures, they'd be there. Looks like I did a picture of the startup checklist that I performed... as well as any deficiencies. Is this something that you see being valuable for your technicians?

SAMUEL

37:08 In a sense, obviously this all comes down to they need to take the effort and we need to put in the effort to create assets for all our customers. Right now. We don't there's probably one or two customers in total for an entire company that have any assets whatsoever. We just haven't done a great job of doing that, but.

BRETT

37:32 Yeah, I think that will.

SAMUEL

37:32 All work on.

BRETT

37:34 Yeah, that's fair to stay. And realistically majority of customers that come to service trade, don't track assets because there's no good way to do it. That is something that ServiceTrade figured out. It's tracking your assets, knowing what you're working on, knowing your customers equipment, you guys are the experts, they hired you for a reason. So you should know everything about them. So, yes, what I'm getting at is this typically is a matter of building this out over time.

--- *Forms* ---

BRETT

38:02 Tell me about your, so tech goes out for a PM. Is he filling out a checklist?

SAMUEL

38:09 Right now, we use checklist inside of a binder that we be on site which I'd love to make that electronic.

BRETT

38:18 Yep. I remember that.

TRISH

38:20 Then they'll fill out... an electronic service flip on the deck.

--- *Access to information* ---

BRETT

38:29 Yep. So I'll show you how that works right here on their mobile app. Everything they need is right here. So I just hit view more details of the tech and just keep in mind, we're gonna train every single one of your technicians how to do this the same way that I got trained.

--- *Forms* ---

BRETT

38:42 They're gonna come up to actions and they're going to go download blank paperwork. So basically, we're gonna take your guys forms that are in that binder right now. We're gonna create them as digital or fill able PDF PDF are going to go into service trade. We're gonna set up dispatch rules if it's an H job, they get their hvac form, refrigeration job, they get the refrigeration form et cetera. So they're gonna generate this form right here from service trade. What we do is we put it into Adobe acrobat, so it can be smart filled. And what I mean by smart fill is we're already tracking a ton of information for this customer. So by making this form digital and putting in service trade, we're gonna put on all the information, we know, for example, the asset, in this case, it's just building. And then all of this information, your technician does not have to type in pointing out that this is an example. We are gonna use your guys forms that you use today. We don't want to change the process all that much. This is just a fill PDF. If it's a matter of checking off the box, it looks like this, if it's free form information, it looks like this, it's pretty simple... kind of what you guys are looking for.

SAMUEL

39:44 Yeah, this is a free usage form. Essentially, I literally have one on my desk right now that I'm filling out for a customer.

BRETT

39:52 Right. We'll take it. We'll make it digital for you... and it's really easy to add it back to the job. So I hit these three dots.

--- *Tech On-site* ---

BRETT

40:01 I hit send a copy. Cool thing is service trade knows, I'm clocked in at comcast center. When I hit add the service trade here, it says, hey, do you want to add this paperwork to comcast center? I'm gonna hit upload and say, yes, just so everything is interconnected. When I go back to my service trade work order, that paperwork that I just filled out is here under attachments... top. When your technicians are filling out those forms, doing their PM, they find a repair opportunity. What does that process look like today?

SAMUEL

40:34 Usually they, if it's a small thing, they just go ahead and do it.

--- *Deficiencies* ---

SAMUEL

40:38 If it's a major repair that needs to be quoted, they send me the info in the office, and then I quote it.

BRETT

40:45 Okay. So yeah, I would continue that process if it's small, just prepare it there. Make a note of it. So you guys know what he did. If not, I'm gonna click on this deficiencies tab here. We're gonna say I just found a broken compressor. So I type that in. I don't have to be crazy descriptive because I am gonna come behind that and add more detail. So I'm gonna take some pictures here's. My broken compressor. Something technicians really like is the ability to do this audio memo because they don't have to type anything in and they can say, hey, Sam here, working on rooftop unit three. I got a broken compressor. It's gonna take me XYZ to fix it. I need three hours took me six seconds to tell you all that information versus writing it down that's my text like it. We'll save all that in. And then your text is going to go through and fill out these fields. So what's the severity of the efficiency? Is it totally inoperable deficient or suggested? What is the asset the problem is occurring on? We're gonna call it rooftop unit three? And then what's the status if it's a brand new deficiency, meaning we need to quote it out. We call it new. If I fixed it on site. This is where they're notifying what they physically did. So I'm gonna call it new if I have a proposed solution as the technician, great type it in if not leave it blank. And so, Sam, we're going to get there once we get back to the office. But that's efficiency is gonna come to you in the office where you're gonna physically quote it out.

--- Tech time tracking ---

BRETT

42:10 What else is important to you guys from the field or the, from the technician point of view?

SAMUEL

42:18 Our biggest thing is forcing them to do these work orders within the week that they're performed that way, it shows up on their time sheet and when we get their time sheet every week to.

--- Parts management (inventory) ---

TRISH

42:30 Accurate. And the material, getting the material listed on the work service orders on time, the guy would say, yeah, refrigerated, write that in but they'd be no quantity refrigerant from the shop. If they don't write it on the service slip.

SAMUEL

42:53 That they're doing have to just do this. There's no system to ensure that gets done correctly besides them actually doing.

--- Tech On-site ---

BRETT

43:03 Yeah, it's a little bit of you guys enforcing like, hey, this is how we're doing things and you need to do your job... as far as like requiring you need someone to put it in the system. There's no way around... that said, I'm not sure if I have the feature turned on, but when I go to clock out of a job... I hit no.

--- Tech time tracking ---

BRETT

43:28 Okay. In this instance, I don't have it turned on, but if you hit no, we can turn on a setting where it's like, did you finish this? Did you add your job items? Did you track your time? It'll pull up basically a tasking sheet saying here's everything that you were supposed to do.

--- Tech On-site ---

TRISH

43:42 Yes, yeah, we'll let you move forward until you do it.

BRETT

43:47 Exactly. You can even set it up in a way where they can't even get dispatched their next job until they finish their current job.

TRISH

43:58 That's good.

BRETT

43:58 And by finish, I mean, putting in all their information, the stuff that you guys are struggling with today. Okay? It's not what I wanted is what actually are you guys getting your work signed off on?

SAMUEL

44:14 Well, authorization in... not really.

BRETT

44:19 Okay. Permission setting in service, right? If you guys don't want it, just turn it off and it won't be required. So we'll clock out of this job. Say, yep, we're done with this. What's going to happen now? Is all the information that your technician just collected in the field is all gonna come back to the office. So let's go here... here... here's. This job that we just worked on?

--- Type of work ---

BRETT

44:50 And real quick before I get into this, how much of your guys work is like PM work versus just service?

SAMUEL

44:59 80 to 90 percent service calls, 10 to 20 percent PMS.

BRETT

45:03 Okay. Are you looking to grow PMS at all? Are you looking to stay in the mainly the?

TRISH

45:08 We pretty.

SAMUEL

45:09 Much have PM contracts with almost all of our service customers or the majority of them. So, but that's all the contracts are like one, one day per month or two days per month tops. And then the rest of it is all keen on service calls.

BRETT

45:28 Gotcha. Okay.

--- Dispatch ---

BRETT

45:34 Back in the office here, a couple of things did happen there guys. So job status currently says in Progress. However when I scroll down to appointments, it says completed. If you guys remember the first page I showed the service dashboard, I showed you this past jobs to our complete bucket.

--- Parts management (purchase orders) ---

BRETT

45:48 This is the current status that our work order is in. It came back to the office. It's in your guy's hands to review it. And so we can see that, hey, here's, that labor that I sourced out brat here's. That wire that I ordered from acme supplies. We can see it's ordered but not received because I just haven't marked it as received yet. I should have done that from the field. It's a matter of clicking a button. So if I ordered it from the vendor that day and I received it that day, I would have just marked it as received. And I received it today. You can now see that this box has turned green.

--- Tech On-site ---

BRETT

46:17 It says it was received. You can also see my clock events the time that your technician was clocked in and route on site. And for job prep, it'll flag it. And I'll say,

hey, Brett was 54 Miles away from location and that's really questionable. You should go talk to your technician about this... as that we went over.

--- Deficiencies ---

BRETT

46:38 But here's that deficiency. I was talking about Sam, my broken compressor. You are also gonna get an e-mail notification saying, hey, Brett just found a broken compressor, rooftop in a three a contact center.

TRISH

46:49 It's gonna look like.

BRETT

46:57 Look exactly like this, in which point you're gonna come in and you're gonna quote it out. So you're gonna click this link. It's gonna take you right to the deficiency. You're gonna see more information about what your technician found. So that's what he just found five minutes ago. If you had any related deficiencies on this piece of equipment, you can see right in to quite a few broken compressors in the past three years. Maybe this is you looking into it deeper and saying, why do we keep running into this issue? And then down under the attachments here's, the picture I took of the deficiency as well as the audio recording. So, Sam, when you're ready to quote this thing out, simply add it to a quote, probably throw an expiration in because I know your guys price has changed like crazy.

--- Quote templates ---

BRETT

47:37 And here's our quote. So you are more than welcome to come in and type whatever you need to type. That said we're a big fan saving time at service trade. I'm sure you are as well. We really like quote templates. Why do we like them? Because let me see. I run into a lot of compressor replacements. It's already built out for me. This is what I do on this type of repair. These are the parts that I use. You might have to change it around a little bit. Every customer's going to be a little bit different.

--- ST app contracts and pricing ---

BRETT

48:00 You can do that here. You can also do that with your line items down here. Before I send this though, I see my margin is minus 343 percent that's horrible. There's no markups on this. So let me go and make sure my contract is correct for this customer.

--- Quote templates ---

BRETT

48:14 When I do that, all the proper markups apply right here. A margin is now where I want it to be. Excuse me, also prior to sending this out, you guys get to pick the level of detail that your customer is gonna see. There are 12 different options here, but whether you want to show just TAM, full line items of prices, grand total up to you guys.

--- ST app contracts and pricing ---

TRISH

48:34 It's important to be able to change that for every customer.

BRETT

48:37 Exactly. And you can even set the fault like this customer received grant total only this customer isn't under a PM contract. So they just get TAM.

SAMUEL

48:47 Yeah, I think that mostly it would just be labor material. One, one item for labor, one item for material materials that wouldn't ever break down all the little items that they would use.

--- ST app contracts and pricing ends ---

TRISH

48:56 22 is 15 dollars a pound sent hold. Can I buy some?

BRETT

49:02 I can't help you there. What's it up to right now?

TRISH

49:09 Quite.

SAMUEL

49:09 Group of that?

BRETT

49:10 Yeah, that sounds about right. Jesus. Okay. So I'm gonna go ahead and send this out to my customer. Sam. I'm gonna use you as my customer.

--- Customer engagement (quoting and invoicing) ---

BRETT

49:19 So I'm gonna send you a copy but I'll pull it up on my screen so everyone can see it prior to sending the quote. You guys pick and choose what goes out to the customer. So, you know, at your technician curse bunch on the outer recording, don't

send it. Not customer friendly, but the picture tells a story. Your customer hired you for a reason. Show them why you're their service provider, you're finding these things. So pull this up in my e-mail... here's. The quote instead of, our service is gonna say independent mechanical send you a quote to some is gonna come down here. They're gonna hit view and respond. So this is what they're going to get from you guys. I went in, did it just like you guys said as far as labor in part. So they're not gonna see individual line items here's. Their grand total here's. Their picture of the problem. Your guys, TS and CS are at the bottom. The customer wants to go ahead and approve the quote, right? They approve it right here. They can even enter their po number and you guys can make it required that they have to enter their po number. Again. Permission. If they don't like it, they can request a change.

--- Quoting ---

BRETT

50:21 They can say, hey, your competitor did 10 percent off. If you can match it. I'll go with you guys. Basically, that just comes back to the office as a message saying whatever the customer said. But in this instance, I'm gonna go ahead and approve it. Lets say, hey here's, my po number and checking this box and approving the quotes, digital signature, they get this nice stamp and then coming back into the office, how things happen... quote status went from submitted to approve. You guys even have this full quote history showing you here's, your tech, adding the recording, the picture in the field. I sent it to. I sent to both myself and Sam, I was the one that physically viewed it though. This is my IP address. I viewed it. I approved it this time and date with this po number. So really important, if you send the quote to multiple people, you wanna know who viewed it, maybe six people viewed it in a day. Why maybe your sales guy calls?

BRETT

51:17 From there, Sam, it's really easy to create a job from this. So you can either add this to an existing job, see all the existing jobs that we have right here. Maybe it's a matter if you're going to contact center sometime soon on October nineteenth, which is today. So you might as well schedule with that job or you can create a new job from the quote, the po copies over.

--- Tech On-site ---

BRETT

51:36 You throw a day in copy, attachments, copy all comments and you simply create another work or from this approved quote in which you guys would need to schedule.

SAMUEL

51:45 My memory is service trade.

TRISH

51:48 All just.

SAMUEL

51:50 One just jobs or is there jobs in visits? Can you have multiple business within a job? Or is it just one job for every visit?

--- Recurring maintenance ---

BRETT

51:58 We can have multiple visits, we call the visits appointment.

SAMUEL

52:03 Okay.

BRETT

52:04 I take you back to our work order here. Like this visit, I'm doing these two services is on October nineteenth. But if I add a new appointment, I can say, I'm doing another service on October twentieth.

SAMUEL

52:15 Got it.

--- Tech On-site ---

TRISH

52:18 So, it all gets rolled up into the same invoice.

BRETT

52:21 Yup. One.

SAMUEL

52:22 At what point does the technician provide a description of what they completed? Like the description of the work completed? I never really saw that on that. Was there basically a section on the app where completed services?

BRETT

52:40 So, two ways to do it either under comment, they can write in what they did. And with the feature, I have turned off where they hit, yes, I'm done with this job. It's gonna pull up a comment box which is gonna go back to here. But it'll be when they physically block out that they have to fill out. Hey, I check this. I check this, I oil this et cetera. Does that make sense?

SAMUEL

53:02 Yeah.

BRETT

53:08 Okay. So let's go back to our original service call. We went over the deficiency. We haven't invoice yet. We're going to get there shortly, but under attachments here's, my technicians billable PDF that they filled out on site. You guys can come in and review it, make sure everything's correct. It's customer friendly as well as the picture I took on site. So, once you guys are through reviewing all this information, you're simply completing it in the office. And this is the point where you can go one of two ways you can the job or you can complete it and create the invoice.

--- Customer engagement (quoting and invoicing) ---

BRETT

53:38 All at once. I'm gonna just complete it, show you a couple of things. This point, you guys can send a service link, which is a fully encompassing post service report of, that visit. You guys have all these toggle switches. You pick and choose what you want your customer to see. I'll include all of this and I'll send you a copy that I'll pull it up as well. Here's. The, the post service report. Hey, independent mechanical came out on Thursday October nineteenth at 215. Brett was your technician here's? What we physically completed, the fix it here's. The parts I used again, you guys probably wouldn't include that... here's.

--- Deficiencies ---

BRETT

54:17 The attachments for the customer. They can download their PM checklist, see their pictures. And lastly, hey, we're notifying them of a deficiency. It is in the verified status because we already approved the quote. We just haven't fixed it yet. That would change of course to fix once we fix it.

--- Customer engagement (quoting and invoicing) ---

TRISH

54:31 So, what's with this summary? This is just the summary. What happens with this?

BRETT

54:37 Yeah, this is what goes to the customer saying, hey, mr, customer. You're going to get an invoice from me in a day or so here's.

TRISH

54:42 Heads up like you get here and.

BRETT

54:46 Exactly. It's it's telling the story of what you guys did on site. So at this point, when I go to physically send the invoice, I make sure all this is right?

--- Invoicing ---

BRETT

55:01 And then when I send the invoice out.

BRETT

55:10 Customer gets the invoice, they know they owe you 1,300 bucks... on that service link, which is also on their invoice, they can see everything that they're paying 1,300 dollars for. Does that make sense?

TRISH

55:26 I'm sorry, say that again.

--- *Pricing* ---

BRETT

55:28 So, yeah, let me rephrase the whole post service report in another way here's your invoice for the customer. Customer understands that they owe you 1,300 bucks. What are they owe you 1,300 bucks for? When they click this, it pulls up that post service report telling that customer every single thing that you did in order to build them 1,300 dollars for.

--- *Invoicing* ---

TRISH

55:48 So, this is only if you're doing invoices in service a.

BRETT

55:53 No, you can also send it if you're invoicing via Quickbooks. That's why I kinda showed you at the first way. Okay. Yeah, you don't have to send it on the invoice. You can just send the service link, then you can invoice through Quickbooks. If that's how you wish to do it.

--- *Tech On-site* ---

SAMUEL

56:06 Yeah, some of our customers nowadays are requesting copies of the work orders day of. So basically, once the work is completed and the work order is filled out by the technician, we need a way for that to be sent to the customers e-mail just so that they know what the work was completed. Not so much what the cost is. The cost is gonna come after through invoicing.

--- *Invoicing* ---

BRETT

56:28 Yeah. So that if you want your office to do it, send that service link, you want your tech to do it. If they were to get their work signed off on, the customer will get a

copy of that right then and there.

BRETT

56:42 Okay. We went over the invoice, you guys know that we can work with Quickbooks. So you guys use desktop, right?

--- *Accounting integrations* ---

SAMUEL

56:52 We are currently on desktop and we're looking to upgrade and it hasn't happened yet.

BRETT

56:59 Okay. What, what do you upgrading to?

SAMUEL

57:02 Basically, they're telling us we have two options. They're trying to push us to Quickbooks online because a lot of the features that we currently have are now only available on the Quickbooks enterprise, which is a lot of money. I guess they're restructuring their product line.

--- *Parts management (inventory)* ---

BRETT

57:22 Yeah, I've been hearing that across the board too. So it sounds like Quickbooks online is on the table for you guys.

SAMUEL

57:30 It's up in the air as of right now.

BRETT

57:32 Okay. Reason I ask that is I know you guys have to look at partsledger for the inventory side of it. Partsledger works with qbo. It does not work with QB.

--- *Accounting integrations* ---

SAMUEL

57:44 So that would be another reason. Why do you get Quickbooks online? Yeah... good to know.

BRETT

57:51 Desktop has a lot of limitations. It's all on the Quickbooks side, which is unfortunate, but we found a way to make it work with online.

BRETT

58:02 Okay. So we got through pretty much the whole, you know, cradle to grave take the service call, go out in the field, do it and then invoice it.

--- Parts management (inventory) ---

BRETT

58:09 What else is important to you guys in this evaluation? You mentioned? I know we got to go over the whole allocating parts to the job thing. That's gotta be another meeting so we can go over partsledger, but what else in service trade might be important to you guys?

--- Accounting integrations ---

SAMUEL

58:29 I think part lecture is a big part of it because whatever software we end up going with is going to be heavily based on how well all the parts are integrated with work orders because that's kind of our biggest problem right now. But in the meantime, the other big thing is ease of use for our technicians. We had looked at a whole bunch of different softwares in the past and the biggest downside we had was that they were heavily dependent on having a dispatcher creating the jobs for the technicians to sign into. I think the, one of the major issues we have with BuildOps and what kind of made us hesitate is ability to select the date.

--- Accounting integrations ends ---

SAMUEL

59:15 So say something, someone goes to take a service call on a Monday, but they don't actually get to the, they're so busy. They don't have time to do the paperwork and they don't create the work order until Tuesday or Wednesday. Being able to backtrack is critical and the work, it was a major work around in BuildOps to make that happen. I think you showed us that it's not so difficult service rate.

BRETT

59:44 No, yeah. You guys are, the reason I learned it was possible. I have some lag on my screen share. Let me just try this again.

--- Access to information ---

TRISH

1:00:00 Yeah, go.

TRISH

1:00:04 No.

BRETT

1:00:06 All right. So, yeah, if the technician in your case, he did this job yesterday, he just didn't get to it. He was super busy technician essentially clicks into any work order because they just got to get to this view, more detail screen. And then from there, all this is going to be permission based.

--- Tech On-site ---

BRETT

1:00:21 So maybe you'll only have your own call guy doing it, maybe have everyone up to you. But the tech simply needs to hit this back button and this little hamburger button in which they can go at a job in. And so I can say, hey, I was working at comcast... and I did an emergency service call and when did I go?

--- Tech On-site ends ---

BRETT

1:00:42 I wanna do something, say I was there on Tuesday and I was there at one PM. I can add this in right here and it physically create the work order. So while it's not an ideal workflow for every single job, it's possible.

--- Tech time tracking ---

SAMUEL

1:00:58 Okay.

TRISH

1:00:59 How does this time get rolled up into a... time sheet that's used to process payroll?

BRETT

1:01:10 Yes, ma'am, give me one second. Let me just make sure I did this, right? Okay. Let's go to 10 car.

BRETT

1:01:23 All right. So our time card is exactly that. We're going to give you guys all the information that you need in order to run payroll, however service trade will not run payroll for you. What system do you use for payroll? Paychex. Got it. So we'll give you the export to work with Paychex that you can import in there for payroll, show you how that works though. So excuse me, everything that you're seeing on the left hand side, I'm an admin on the account. So I can see my settings, my logs, et cetera. As far as your technicians, all they're gonna see a submit time card review time card and how this process works is at the end of the week, technicians submits the time card to, their manager approves it or they request changes on it. If they request changes, goes back to the tech fixes, it submits it again, if it's approved, you're good to go. So I'm gonna say here is Brett Griffith. You guys can do time sheets off of either labor items or clock events up to you. I'll rock with the labor item here today. And so I can see on Thursday, it looks like we have nine different hours and so, I, this is the wrong account... one.

TRISH

1:02:39 Card.

TRISH

1:02:46 Here I am.

BRETT

1:02:47 All right. Moving forward here. So here's the time card or the time that we just filled out on site together. I use that Eli Manning code at comcast center. You can see I work three hours right there. So this is what flows onto the time card. You guys can also add additional rows. Maybe you need to track over time, vacation, pto, etcetera. These are all customizable as far as what you want. So, let's say on Friday, I have eight hours of pto. This is me as the technician filling this out. And so when I go to submit my time card, maybe I say that my pto as approved. And then I check this box and certify it to be true. Great. My manager gets an e-mail saying, hey, Brett just submitted a time card, go and review it. They're coming in here. They're viewing it. They're saying it looks like Brett work three hours on this job at comcast center. This is hyperlinked to the physical job and service rate. So I can go back and double check, make sure it's right? It looks like Brett put eight hours of overtime in not of pto. So, in this instance, I would request a change. I would say... change our...

TRISH

1:03:49 From...

BRETT

1:03:50 To... submit it back, I would go in again. I'm getting an e-mail it's got a link in it. I'm changing that again. I'm kinda going through that same process again until my time card is correct, and that is how your technicians are going to get paid. And that's how our customers make sure that their technicians do this. Does that make sense? Trish?

TRISH

1:04:09 Yeah. So they are actually filling in the hours here. They're not pulling them from the job.

BRETT

1:04:16 No, that's the benefit of them doing it on the job and they don't have to do a time sheet at the end of the week. It's just a review essential.

TRISH

1:04:25 So they can send it over to the time sheet.

BRETT

1:04:29 Yeah. When they, that's why they track either their clock events or their labor items from the mobile app that's what feeds the time sheet.

TRISH

1:04:36 It does.

BRETT

1:04:38 Yeah, sorry.

TRISH

1:04:39 You just went in here and type in that?

BRETT

1:04:43 Yes, that was for anything that wasn't associated with a job. So over time pto, that stuff, they're still going to have to put in, but anything associated with the job hours to a job on pre.

TRISH

1:04:56 Yeah.

BRETT

1:04:58 And with that, like for Paychex. So template settings, we will set up an export template that matches up with what Paychex requires the import to look like that way. You just get an excel sheet, import to Paychex every week.

BRETT

1:05:20 What else is important? We did the post dating job, the time card, I know partsledger will set up a meeting for that at the end.

TRISH

1:05:26 Okay.

--- Tech time tracking ends ---

SAMUEL

1:05:37 I don't think I have any more questions. I think the big thing now is we need to set up another meeting just for partsledger, so we can get a much better understanding of how that works.

BRETT

1:05:50 You guys do Friday at one 30 the 20 seventh?

TRISH

1:06:05 I can.

SAMUEL

1:06:06 I think I can as well.

BRETT

1:06:11 On there, I'm just gonna get it on the calendar now. So no one else take that slot as you can see you're kind of busy... cool. So what we'll do is, yes, we'll do that partsledger demo on Friday the 20 seventh, that will give you really the full picture, of ServiceTrade functionality and what it can provide to your business.

--- Accounting integrations ---

BRETT

1:06:30 At that point. It very well might be, a, you know, you need to talk to our Quickbooks person that's fine. We have someone on staff that can talk to you about how ServiceTrade partsledger integrate with Quickbooks. And then the other thing I'll pull up is Sam, you remember recap?

--- Purchase decision ---

SAMUEL

1:06:49 Yes.

TRISH

1:06:51 Yes.

BRETT

1:06:51 So...

BRETT

1:06:57 This is just for Trish and Tim. This is really just a shared workspace that I sent to Sam last time as far as what we needed to do in this process, you guys wanna be live January one and it's not really possible. But February one is basically, I'm gonna write down everything in here that we need to do that we are set out to do as far as our plans and anything that you guys need to do as far as decision process, we need to meet with our board, we need to talk to our CFO, whatever it is. Let me know. I'll put it in here. It's just going to help us all stay on the same page a little bit better because as we started with the meeting, you guys are extremely busy and so... are you guys okay with using this?

SAMUEL

1:07:39 Sure.

BRETT

1:07:42 I'll send you a copy after... I will review it again because I know it's been a couple of months since we met. I'll make sure it has everything you guys need just to point out. I'll put in, I think I already have it in here but like the Quickbooks integration video might be a good thing for you guys to look at. Also the partsledger

tab. It's going to have a lot of information, but we will go over that on Friday the 20 seventh. But yeah, guys, everything you're telling me, it sounds like it's a good fit for service trade. I think we're going to get a little bit more into any ready to work out the details, but I'm excited to continue this process with you to see if or see how you guys feel about service trade versus BuildOps or service.

--- Purchase decision ends ---

TRISH

1:08:20 Sounds good. Thanks for the help.

BRETT

1:08:22 Yeah, Tim. Thanks for joining, Trish. Sam. Great to see you guys again. I will send you the invite right now and I'll talk to you next Friday.

SAMUEL

1:08:29 Sounds...

TRISH

1:08:29 Good. Thank you.

BRETT

1:08:31 Take care guys.

The End