UAMS ServiceTrade Review

Dorothy Westall with Universal Automation & Mechanical Services
Recorded on 3/2/23 via Zoom, 26 min.

Participants

SERVICETRADE

Dorothy Westall
Account Manager

UNIVERSAL AUTOMATION & MECHANICAL SERVICES

Mike Rigdon
General Manager

OTHER

William Rigdon

Topics

Transcript

--- Call Setup ---

MIKE

0:00 Dorothy, can you hear us?

DOROTHY

0:03 I can.

MIKE

0:04 There we go. Sorry, they just did this is, well, they did updates on our computers recently and they screwed everything out.

DOROTHY

0:12 Updates go, right?

MIKE

0:14 Yeah, nothing working, right? So.

DOROTHY

0:18 No, I'm sorry to hear that, but I'm glad you made it happen. How are you doing?

MIKE

0:22 Not bad. How are you?

DOROTHY

0:24 I'm doing okay. I realized that we all haven't talked to each other yet this year. So I wanted to make sure that we touch base and talked about any goals that I'll have going into 2023 and if there's anything that I need to be on standby for, are things going over there?

MIKE

0:43 Yeah, they're going well. I'm just Mike is coming in now, he uses service trade more than I do. So he could definitely speak to how it's going on the service side. Okay? But as far as I know for me, it's going great. You're not getting...

DOROTHY

1:02 Complaints from anybody. This is good news. I heard.

--- Call Setup ends ---

MIKE

1:05 The only thing that I run into is when I'm using the quoting system, it seems a lot of times that the quotes are going to people's junk, which is... a little bit obnoxious.

DOROTHY

1:17 Is that a new occurrence for you guys? Like in the last few weeks or is that something that's been pretty standard?

MIKE

1:24 Pretty that's I mean, when I was here the first time, it would happen on occasion, but it seems to be happening on the regular at this point.

DOROTHY

1:35 Yeah. I think really the reason behind that is because people are getting more beefed up in their own cyber security, you know, just across the board, no matter what type of business that you have a, and so with that, there's like email restrictions, they get added in just like how you all just had your computers updated, your customers are probably going through the same thing. So every once in a while, what I would do maybe like once a month, if that feels like a good cadence for you. I'd send out an email about white listing. And what I can do is shoot you over the information that you would want to include in that for your customers, and then just making sure or if you have somebody who calls you and they're like we're not getting your quotes, then okay here, let me, I'm gonna send you from my personal email, how to white list service trade and get it done. That way you can do it at hock, if you want. Just on a needed as needed basis. The other thing?

MIKE

2:35 That can.

DOROTHY

2:35 Help with that is if we work to sort of train your customers to go to your portal on your website for their quotes. So then that way the email thing becomes obsolete. I mean, obsolete absolute. That's funny. But anyway, at that point, they can just log right in, look at what's open, approve it or request changes as they need to.

MIKE

2:58 Yeah, that makes a lot of sense. So, okay, service trade is going in general. Yeah... it's all right. I'm gonna tell you, I'm going.

DOROTHY

3:15 Elaborated...

MIKE

3:16 But because the lack of flexibility within service trade?

DOROTHY

3:24 Like...

MIKE

3:25 Customizing certain things, like we are gonna look to invoice because we don't invoice out of service trade. And like in the invoice is it's fixed. What we can send out there's no customization and what goes out is totally unacceptable. And it's okay. Like you can't even bring in service, the dates which I don't understand is why can't it have the data service on the invoice? You know, it's in service trade and we talk to your team over there like, well, we'll put in a ticket for, and see what we can do and.

DOROTHY

4:01 I'm...

MIKE

4:01 Like, and then they come back to the, yeah, we can't do that. And so... I'm a little aggregated with that.

DOROTHY

4:12 Okay. I mean, I definitely understand that is, you know, sort of our whole model is that we keep things in a certain frame. And so like anything like that, like adding in the appointment dates would affect every customer. So, the one thing though is with your invoice links, if they click into view more details, it's gonna give them all that information that you're talking about. It's just not there on the invoice itself. But the information exists, are you sending your invoices out right now?

MIKE

4:47 Well, we will send everything out through Quickbooks, but we been looking because Quickbooks has a lot of gaps too because we're running into as we've gone into multi level labor rates depending on trade and existing customers versus new. There's a lot of variability there. Quickbooks sucks and doing that... and sure trade, obviously, we can set up a, and put all that in there, but, you know.

DOROTHY

5:16 Yeah.

MIKE

5:17 So then we're okay, we'll maybe we'll invoice out of service trade, but then we get to the invoice which is, you know, to me is I don't know it doesn't look good. And what you said at the problem with service trade is that everything is, it's very

standard for everybody and not customizable per customer. And that, that's a little, I don't know to me is we're running to a problem. I got two systems which are inflexible.

DOROTHY

5:47 Yes, right. So, service trading and Quickbooks. And so what other accounting tools are you looking at right now? Have you gone into that search yet?

MIKE

6:00 We've looked at, we have looked at some other accounting tools. We haven't come up with one. You know, that's perfect yet. So.

DOROTHY

6:08 Okay. What have you looked at?

MIKE

6:11 I can't remember what the names were. Now we've looked at them last year and then we walked away from them. We actually one of them, they never got back to us. And so one of them, to be honest, one we looked at had a service module all built into it. So it was all in one.

DOROTHY

6:27 So, well, the reason why I asked that case. So it sounds like you went into it last year, then you kinda stepped away from it. And now you're back to, hey, this is really painful for us. We should probably be looking at how we're doing our invoices right now. So I appreciate you guys, you know, bringing this to my attention. And we do have internal accounting resources and I think it may be a good idea for us to set up sort of a consultant session with them to just talk about, you know, the different tools that are out there, give you some like high level pricing, you know, to give you the idea of what you've run into. And then if there's any of those that really interest you, then we can facilitate the, you know, the meeting for you by just connecting you to one of those partners.

MIKE

7:15 Yeah. I mean, let me if you can tell me which ones because I'm sure our account remembers which ones we looked at. I don't remember off the top of my head.

DOROTHY

7:23 Okay. I'll send you a typically.

MIKE

7:26 Partner with and I can see if we've looked at any of those.

DOROTHY

7:30 Okay. Yeah. I can send these over in an email for you, but just really quickly, a lot of what I see customers using when they wanna move from Quickbooks to something a little lazier, they generally take a look over at Sage. And Sage has several options. So it kinda depends on what you're feeling and different people sell those different tools. So you have something that's more in depth... called impact then you have Sage 101 100 contractor.

MIKE

8:04 He looked at in tack when we first came on.

DOROTHY

8:06 Okay.

MIKE

8:07 Recommending but they don't do payroll. And, okay, so we'd have to go to a third party payroll. So we kinda walk away from that because we don't wanna do that.

DOROTHY

8:17 Understood. Okay. Another one that may be interesting for you to look at is... NetSuite NetSuite is fine tool and we have a good integration got or a partner that built a really solid integration between the two systems. It actually goes both, you know, bidirectional where Quickbooks only let you push the one way so that's something to think about. I hear people using computers, but I would advise against computer is just because of the headaches and the pain and that I hear from my customers who are currently using that platform, their trouble with the support over there. Things like that. I would not go.

MIKE

9:00 Okay. Well, I'm gonna ask and see if we, I don't know if we looked at NetSuite, I can see.

DOROTHY

9:05 Okay. Well, if, you know, do a little high level glance at that, and then if you're interested in knowing more, let me connect you to my partners. They're very thorough and I can vouch for their accountability. So they won't leave you hanging when it comes to, you know, you've reached out. You've done a demo. They're not going to be like, well, let's not ever call Mike back. You know, they're going to be all over that.

MIKE

9:27 Yeah. Okay.

DOROTHY

9:29 Yeah. Okay. So that's one thing the other thing I'd like to do though is just maybe... look at the invoices together. Like what you, what you're seeing now, sort of

what the problems are that you're running into to see if there's anything that I can think of creatively with our existing invoices in service trade. But if we can get that to a place where you and your customers are comfortable with the information kinda hanging out in that service link instead of on the invoice itself. Then that's another place where your portal can be very powerful set up.

MIKE

10:06 Yeah, but I see, I still don't even understand why any customer would not want to see the date the service was... rendered, you know, on the invoice. It's beyond me and then why you would never do that? Like I kinda crazy the information's in service trade. Why that wouldn't be a standard field. It makes no sense.

DOROTHY

10:29 Yeah. Yeah. I'm actually working at all of it right now just to see if there's something here where you can add in sort of that little detail, but you're right? It doesn't break down and show you the appointment date, but that is, again, it would be there on the service link as far as when that actually took place.

MIKE

10:52 I could this as well. Yeah. So I would look at is something just to pass on to your development team. I know, I'm sure they have ideas and things that they review, you know, the look at BuildOps. I know their competitor views. We've looked at them in the past. Obviously, we don't use them. But one of the things they offered that was sort of interesting was on the invoicing piece. It was very customizable in that you would basically be given like the invoice form and you could pretty much drag and drop anything in there you wanted to. You could move the logos around, you could add the, you know, aging sheets for the Ar, you could add in, you know, basically any information that you possibly could think of and drag it around and make it look like whatever you want. I think that's something that would benefit us because we do have different customers looking for different things and you know, it would be helpful for us because that's sort of the missing piece as to why we can't use ServiceTrade for the.

DOROTHY

11:57 Yeah. Okay. I can definitely talk with them about that. I will tell you guys that as far as what's late now for development this year, is there's that big project management focus that's going on? You know, we just rolled whips yesterday... and we're also looking at doing, you know, a SSO, the single sign on option for security purposes. We have a lot of people asking for that. So that's do to come out probably Q3 or Q4. So there's some things that are on the docket. I guess you could say. So I'm not sure that if even if I bring the invoice idea to them and they're like, yeah, Dorothy, this is really great that they would say, okay, we can fit this into the road map. But the good news is I have really great working relationships with my team and I connected into the product team as well as the development team. So what I can do is kinda go stealth mode on it and talk to them, you know, like I actually have conversations instead of like working through putting in a feature request because I heard guys say that the support team put that in and it got shot down. So it's like sometimes it's better just to kinda tackle it from a different angle so that it's not working through those proper channels and you just kinda go to the powers of be, say, hey here's, what I'm trying to do, you understand why this would be beneficial and why it would be a Universal, you know, no pun intended... maybe a little put in

Universal, good for a benefit for our customers, right? So we can try that. But sadly, it's just not something that I can tell you anything fully positive on, you know, where I can be like, yeah, let's we're gonna here's the best way to do it.

MIKE

13:55 That I think it's good to just have that illustrative point to them that sort of what works. And, you know, you mentioned the project management that's what I do here instruction, project managing. And, you know, I, I've looked at a lot of the stuff that the team has put out and it still doesn't necessarily line up with what I need as a project manager. So I would again, I would steer them to look at a platform like BuildOps and what there and what they're doing is there's much more of the project management than, you know, the budgeting and the invoicing piece. There's a.

DOROTHY

14:36 Yeah.

MIKE

14:37 Things like submittals, there's a whole workflow, the whole workflow that's completely different than service. I have to use an excel through no fault of service trade. I mean, we're newer to the project business than we've been with service trade longer than we've been with Construction. But I have to, I use excel spreadsheets and, you know, shared folders to kinda manage a lot of the documentation and things along with it because service trade just doesn't give me that functionality to we use it to track say time and, you know, the quotes and the actual expenses, but we were not able to really use it to actually use the do the project and execute.

DOROTHY

15:22 Okay. You know, well that, I mean, you're making very valid points, right? Like we're kind of learning and we're learning from our customers while we're building all of this out. And... so it might be a good idea if you're open to it, of course, where I can connect you to the product team and get you in the sort of beta group of project management conversations and features where, and it's not like, hey, this rolled out and it's live today and you just have access to it. Instead, they show you mock ups of what they think it should look like. They gather your feedback on what you think should be changed even if it's just like the wording around something and making sure that like the definitions makes sense to the industry. So things like that you can be a part of and you know, it will be helpful to us 100 percent to have your insight on that, but then it will also give you that little bit of extra control and what's going into the product. So, is that something you're going to?

MIKE

16:28 I just do, but I wonder, I mean it really comes back to me, you know, what service crazy strategy? I mean, I don't get a sense they want to even delve into that area of Construction and.

DOROTHY

16:46 Yeah, I.

MIKE

16:48 Because that's really what William is talking about. I mean, this is more on the Construction. We have a workflow which is far different than anything that we've seen, you know, out of ServiceTrade. I mean, our job last upwards of a year to two years sometimes. So it's sort of things that are completely different than some of these service jobs and what we consider a service project whereas, you know, maybe three or four days a week, two weeks or they do stuff. My jobs are here to two years, a lot of time. And I don't know if that's because I mean, I know, you know, when we met Billy first, when we first started coming on ServiceTrade, he was very clear, you know, you have a Lane that you guys wanna be in. And like you always use that analogy, you have 20 apps. You don't have one app that does everything. So.

DOROTHY

17:32 Yeah.

MIKE

17:33 That's not what services trades, you know, kind of strategy is that we, you know, we understand that.

DOROTHY

17:40 Yeah, I mean, and historically, that's definitely been the strategy. It's all like, hey, we're here for your recurring service. Where here for those emergency service calls things like that. Yeah, but what they started to dig into is like, okay, there's this area between like a service trade and a BuildOps or a service trade, and a pro core where you have these jobs that are not quite large. And if not like these year two year long jobs like what you're talking about, but maybe a couple of months where you have multiple phases and you're going back and you have different crews and you wanna see what items and labor and everything like that was sumed per service, right? So it's just kind of making a little bridge but it's I don't think we're gonna step into large Construction at all. But who knows with the way things change around here, you know, we could find ourselves in a place where there's a separate platform that we pick up since that seems to be what we're doing here lately is acquiring other companies. There may be a chance that something like that comes about, but for right now, this is where we're at, right? So it might not, I'm not sure if you're doing those large jobs, it might not even be the right fit for you, right?

MIKE

19:01 Yeah. Well, that's kind of what I'm thinking. It's just, it probably isn't I don't think that's ever, the area that ServiceTrade has played in doesn't seem like you want to play in. So, and that's understandable.

DOROTHY

19:13 Yeah. We're all about trying to get the one thing, right?

MIKE

19:17 I understand. And that's why, like on the service side, I understand. I mean, I think we've always liked it. It's simple, it works well and stuff like that, and we've always ignore the invoicing because we've done it. But now that we've run into a

situation, it's been, you know, I think it highlights some inflexibilities within service trade... because you do, you kinda have one platform for everybody. So, and timizable is... as I would like, I guess at this point, so.

DOROTHY

19:52 Yeah. Well, here's what I can tell you guys though since this is the type of work that you're doing and we started this conversation talking, you know, accounting and ERP, and all that NetSuite really is the way that I would think for you guys to go because they have a good if I'm remembering this correctly, which I'm so sorry if I'm giving this information, but if I'm remembering correctly, they have a good Construction... piece of their platform. You know, they can even run inventory if you want, you know, of course, we can do inventory and partsledger as well, but that might really be the move for you guys to look at them. So.

MIKE

20:37 Well, we can look at it, I mean.

DOROTHY

20:39 Yeah.

MIKE

20:40 Because I mean, obviously, our account and he changed off of Quickbooks. But I mean, we're looking at, I mean, I've had this conversation multiple times like I said, we got two platforms that are not very customizable and it somewhere something's gotta change, you know, as we continue to grow because it's now everything's falling back... on us to remember to change labor rates to do this. And then, you know, it's too much manual intervention, which is, you know?

DOROTHY

21:08 Yeah.

MIKE

21:09 A lot of opportunity for error.

DOROTHY

21:12 Yeah. Yeah. I completely understand that. It's like most are the more automation you can have, you know, one, it's gonna speed things up for you two.

--- *Wrap-up* ---

DOROTHY

21:22 It's gonna eliminate the space for human error, which just happens, you know, but so I hear you loud and clear and what's your accounts?

MIKE

21:33 Donna, Susan, Donna does all our billing. I think she's reached out to you because... looking hard into this invoicing, and we were just trying to figure out what we could do within service tray, trying to understand it more. And that's when we ran into these roadblocks of, yeah, we can't change anything and.

--- Wrap-up ends ---

DOROTHY

21:57 Yeah, she has reached out to me as soon as you said her name. I was like we've definitely talked a little bit about this and we went through the whole feature request conversation too... of how that whole process works. But yeah, that was the last that we spoke to each other and that was February 20 second. But if she, if she's interested in looking at other things, like I said, I'm happy to help set those up and even sit there like a little fly on the wall just, you know... as extra support for her or whatever she may need in that case to kinda speak to what service trade can do. So just let me know how I can be helpful on that front. And yeah, I'll do whatever I can for you guys, you know?

MIKE

22:47 Yeah, no, you've been great. I mean, I appreciate that. We're just trying to figure things out as we go along.

DOROTHY

22:53 Yeah. I mean aren't we all isn't that life, my man, every day. I'm just figuring it out. Okay, here we go. But no, I appreciate you guys. You were, some of, you know, like it's weird to say favorite customers because honestly, at this point, like I pretty much would consider most of my customers to be a favorite, but I've really enjoyed working with you guys. So let's say and so I appreciate you being candid with me.
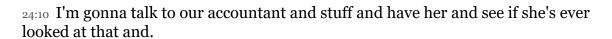
MIKE

23:25 You asked the question, so.

DOROTHY

23:27 You know, it like I don't ask things because I want you to lie to me. I'd rather you tell me the truth. So what I'll do is a follow up here is I'll just shoot you over a little information that I have around NetSuite.

--- Next Steps ---

DOROTHY

23:44 I can even include my contact information. But like I said, I'm more than happy to help set that meeting up and be a part of it and everything like that. So you'll just kinda let me know when you're ready. I will be out of town from the sixth to the fourteenth, but I'll be back on the fifteenth so we can always just pick right back up but I like to give people a little bit of a warning in case you reach out to me in the in between.

--- Next Steps ends ---

MIKE

24:10 I'm gonna talk to our accountant and stuff and have her and see if she's ever looked at that and.

DOROTHY

24:15 Perfect.

MIKE

24:17 So we can at least start the conversation because like you said, somewhere we're gonna have, we're gonna have to make a change because.

DOROTHY

24:23 Right.

MIKE

24:24 Like I said, as we get more complex as a business, it's we got that are gonna support it.

DOROTHY

24:32 Exactly. It's like we're in the scaling phase too. So I completely understand. Do you want me to go ahead and include Suzanne on this email that I sent to you?

MIKE

24:41 Guys or? Okay, yeah, perfect.

DOROTHY

24:47 All right, cool. I'll get this sent out to you guys here in just a little bit, and then if anything pops up, just shoot it my way even if I'm out, I should have somebody kind of acting as backup for me. So... you won't be left.

MIKE

25:02 Well, no, there's nothing that, that's that pending. I mean, we've been living with this for a while so it's not like anything we're gonna jump off the cliff tomorrow on it. So we're just trying to explore what our options are to figure out, you know, how to move forward in, you know, in the future, but it's nothing's immediate. So.

--- *Wrap-up* ---

DOROTHY

25:22 Okay, cool.

MIKE

25:24 Hope you going on vacation, going away somewhere. Nice. So it's...

DOROTHY

25:28 I am, I, I'm actually gonna be in awahoo, it's gonna be great.

MIKE

25:31 Very nice. See, I don't want you to worry about it, so enjoy a walk, so.

DOROTHY

25:36 Thank you so much. But yeah. So when I get back, I'll set myself a reminder just to reach out to you guys though, and then you can let me know how you're feeling and thinking and then we can roll from there.

MIKE

25:49 Good. That be great.

DOROTHY

25:51 All right. Well, thank you, Mike, and thank you will. Is there anything else that I can answer for you or do for you today?

MIKE

25:58 No, I think we're good. We're all good. Thank you.

DOROTHY

26:02 Perfect. You guys are wonderful. I hope you have a good rest of your day.

--- Wrap-up ends ---

MIKE

26:05 You too Dorothy and enjoy a, who? Thank you. Yeah.

DOROTHY

26:09 All right. Bye.

The End