



# **ServiceTrade Demo with Infinity Contracting Service Corp.**

Brett Griffith with Infinity Contracting Service Corp.  
Recorded on 10/11/22 via Zoom, 1 hour 26 min.

## **Participants**

### **SERVICE TRADE**

Brett Griffith  
*Territory Manager*

Amanda Vaughan  
*SDR*

### **INFINITY CONTRACTING SERVICE CORP.**

Michael Gigante

### **OTHER**

Daniel Remiszewski

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# Transcript

*"This English transcript was generated using Gong's speech-to-text technology"*

BRETT

0:00 Hey, good afternoon, Michael. Can you hear me?

MICHAEL

0:02 Hello? Yes, I can hear you. How's it going?

BRETT

0:05 Doing well. How are you doing today?

MICHAEL

0:07 Doing well. Thank you.

BRETT

0:09 To hear it. Well, Michael, thank you for joining me today. My name is Brett Griffin on the inside territory manager here at service trade for the northeast. Is it just gonna be you today or do we have someone else joined?

MICHAEL

0:22 So say it's just gonna be me. There was someone else who was planning to join but he's not in today. So it'll just be me.

BRETT

0:29 No worries. I will record the demonstration so I can share it with you guys after. So whoever you need to send it to you'll, have that. But Michael, before we get started, what's your role over there at Infinity?

MICHAEL

0:42 So actually I don't work with Infinity contracts. You know, when we careful and clear, I guess I'm a former employee. Now, the structure here, it's a little bit strange, but I formerly worked as a project coordinator for Infinity and their service department. And now the company I work for is called K to, and that's kind of more on the back end handling the management and sort of resource sharing.

*--- Type of work ---*

MICHAEL

1:14 So that like HR, payroll, accounting, those types of things that aren't really the focus for business like Infinity which is focused on Construction and the mechanical service work for their service department that they don't need to kind of get bogged down with those things. And they can focus on the operations that they know, and we're kind have handling the back end and that's how kind of now I'm coming into... the picture here because for Infinity and specifically their service borrowing, they've been using Viewpoint spectrum for kind of managing those jobs and dispatching and things like that.

--- *Type of work ends* ---

MICHAEL

1:52 And it's not really a platform that is adequate for that or was really seemingly built for it. But like I was saying, they're kind have so focused on the operations hard for them. Just take a step back and look at the market, see what else is out there and find something that kind have would fit their needs. And because I was formerly in that role that's why I'm now helping on kind of the back end to find something that'll work for them.

BRETT

2:18 Gotcha. And then just to clip... sorry, my headset did something weird there. But just to clarify for me. So will you be involved in this entire process with Infinity sites? Service trade is a good fit and we go through the sales cycle. You'll be with us the entire way just to confirm?

MICHAEL

2:37 Yes, correct.

BRETT

2:39 Okay. Cool. Awesome. And so really to give you an idea, Michael, how we like to do the things from our end, I'm just gonna start off by asking some more questions about the business. I'm glad you do have the background from work in there, but from there, I'll give you a little background on service trade itself.

--- *Purchase decision* ---

BRETT

2:57 And then we will go ahead and jump into the demo and that demos really, it is your one on one time with service trade. You got questions, comments, concerns. It's your chance to speak up so we can go ahead and talk about those things. Does that work?

MICHAEL

3:10 Yes, that sounds great.

--- *Type of work* ---

BRETT

3:11 Alright. So my understanding of Infinity is you guys were formerly known as dad's name mechanical and change the name maybe five years ago, correct?

MICHAEL

3:19 Yes, that's correct.

BRETT

3:21 Okay. So it looks like you guys have two separate divisions. One is more longer term project, maybe new Construction, and one is more shorter term, you know, projects from a day, two a month, but most are less than six months. Is that accurate?

MICHAEL

3:35 Yes.

BRETT

3:37 Hi. Now, are you Michael looking for service or software for Infinity for both sides of the business there, or are you looking for one or the other?

MICHAEL

3:47 So this would be specific to their service department, which is more of those short term projects?

BRETT

3:52 Okay, perfect. And you guys are specifically mechanical contractor, right?

--- Accounting integrations ---

MICHAEL

3:57 Yes, correct.

BRETT

3:58 Hi. So like H back refrigeration, piping, all that good stuff?

MICHAEL

4:02 Yeah, exactly.

BRETT

4:06 And then like you said, you use or they're using spectrum Viewpoint for service, then honestly hit the nail on the head there. Typically, what I hear what that one is. Hey, yeah, we're using an ERP system for our service tool. It's not made for it. Nothing works. I think sounds like they're running into as well. Okay. Are there any

specific problems that they've mentioned? I know Amanda, let me know that double data entry into spectrum is a big pain. And then equipment history is something that is maybe written on paper notes and it has to be transferred to.

--- Paper process ---

MICHAEL

4:40 Right. And so that kind of touches on another issue that we do. Facebook spectrum is like the tickets from the technicians. When we get those, it's mostly save it as a film or PDF. And if we want that information anywhere, you pretty much need to copy and paste it to somewhere else. And a lot of these agencies because we mostly work with city and state agencies, have their own specific forms that they want to work tickets that they want the invoices in. And so to kind of work with spectrum to get that information in and then get it out into reports is not super accessible. So that's definitely one thing that we some trouble with. Another thing that there's some trouble with is kind have like the reporting end of it, it's harder for us to see what has been build, what has been paid and kinda what spectrum there's two different modules that the jobs go through there's like work orders and jobs. And because of that, to like unify the two is just a lot of work for everyone in the office for the service department to be on the back end, doing the accounting and going into different places and information getting lost. And I'm just not a very simple workflow. And, you know, whenever we have new employees, they ask why do we have to do all of this? And?

--- Paper process ends ---

BRETT

6:04 Yeah.

MICHAEL

6:04 Just because we have to.

BRETT

6:06 Yeah, it's like we understand that we've been doing it for years. It's just the way it is, but it can definitely be easier and kinda sounds like the reason we're here today, right? Excellent. So Michael to go off everything you just said there. If I can show you guys a way to reduce the data entry over into the ERP system. Provide you guys would take a hit or equipment history excuse may get those tickets off of syllable PDF and make it easier for you guys to transfer that information to your customers after the work has been done as well as give you reporting on, you know, what's been invoiced, what's been paid? All that good stuff. Do you guys have a time line that you're looking to get started with the news?

--- Implementation and ongoing support ---

MICHAEL

6:47 So to get to or not to get too specific with it, not any set time line but it would be something that, you know, hopefully in a month or so, we would at least have a decision made and be ready to start getting the ball rolling and kind of figuring out



what we need to do to Andrea with the new system, get our employees trained, make sure that it's still does work with spectrum as kind of the back end for the accounting side, but the information that they need to be in the new system.

BRETT

7:21 Okay. Yeah. And that's totally fine by us. A month is typically what I see as well with companies your size and so on that. I just want to set an expectation real quick for you at service trade. We have a concept of a service delivery window. Essentially what that means is that the earliest I can get started on implementing your account as of today, and let me just double check for you. The earliest start date I have for a company, your size is November fifteenth. That date will continue to push back as we move on throughout the year. But start dates are always on the fifteenth or the first of the month.

MICHAEL

7:55 Okay. Got it. I think for us that wouldn't be okay because I know I'm kind of the first line here, but then, you know, depending on what we see and then when I take away from this and discuss with the team, we'd probably bring in some people from Infinity to just get their feedback on it, get them to kinda see it and see if it would be realistic for them.

--- Purchase decision ---

MICHAEL

8:19 And then to raise any of their concerns just because I know from my end, I can say, you know, what I see and what I think. But if they're the ones who are using it, it's really their feedback is going to be the most important.

BRETT

8:32 Yeah, absolutely. I love the sound of it. Let's give you the high level overview today. Let you do your thing. Definitely going to have another meeting with the Infinity people. Another thing we mentioned there is we wanna make sure it works with spectrum. I've got the resources on my team to make that happen. So Tanya is our, I color our accounting specialist.

--- Purchase decision ends ---

BRETT

8:51 She's our director of partner relationships. We will if service trade looks good to you after this meeting. And after the meeting with Infinity, we can jump on a call with Tonya and she can go through kind of what the integration can look like there for your specific needs.

--- Purchase decision ---

BRETT

9:06 And really my goal is to just give you guys all the resources you need in order to make a decision.

MICHAEL

9:11 Got it.

BRETT

9:13 Cool. Are there any other programs that you're exploring today? My?

MICHAEL

9:20 So the big one right now that we're kind of looking at. So we did look at a lot of different options and some of them just, you know, try the free demos and things like that. But the one that we have like met with and things so far is BuildOps... and that's really like the other one that we're I would say strongly considering at this point just because we're a little bit further on in this process we've had to wear. So meetings with them... so kind of just know their system a little bit better at this point and we're kind of looking to get... do our due diligence learn a little bit more about everything else out there as well and not just, you know, settlement software.

BRETT

10:05 Yeah, absolutely. Sounds like a good plan to make... and then excuse mean, is there anyone else? So I know we're gonna have to pull in people from Infinity. But as far as making a decision, you know, getting down the nitty, gritty, who else are we going to have to pull into this conversation?

MICHAEL

10:23 So the other people most likely it would be Daniel who put him to get today for this meeting and then toss us who's the director for the service department with Infinity and Stephanie out, who is the service supervisor for that department and they're kind of the decision makers and they're the ones who it's gonna come down to their call whether or not, you know, they're looking to move forward.

--- Pricing ---

BRETT

10:50 Okay. And then I guess my last question there along this topic is do you guys know what you're looking to spend on new soft?

MICHAEL

11:03 Let me think.

MICHAEL

11:08 It kinda depends what that pricing model comes down to and, you know, two seats for users in the office count as something that will, you know, be another user or is it just guys in the field? If we have guys in teams of two, does that count as just one license or is that going to be too? I know that's another thing. I've seen a lot of different pricing models. So there are a lot of different factors. It's hard for me to give an exact number.

--- Pricing ends ---

MICHAEL

11:39 I think Daniel would be able to have a better idea. But at this point, I would say if it was something that like on your end, you thought the price was a little bit high for don't want that to be a stopping.

BRETT

11:52 Okay. And yeah, on that topic as well as you brought up a lot of good questions there, does the office count our recharging them or we're just charging texts with service trade? I'll let you know right off the bat. All your office staff, Sprague, I'm only charging you for your technicians. You're running in the field. We'll have to dive deeper into, you know, if we have two guys run it on the job, what that will look like? We definitely have the concept of help or licenses.

--- Type of work ---

BRETT

12:15 So maybe one to help or ones that lead tech, maybe one doesn't even have a license, but we can definitely pause on that question and wait for Daniel until he's on our next meeting?

MICHAEL

12:25 Right. That sounds good.

BRETT

12:27 Cool. And then my last question, as far as infinities, everyday practices, it sounds like, yes, a lot of the service division is small project. What are you guys also doing? Any kind of like preventative maintenance or recurring work?

--- Recurring maintenance ---

MICHAEL

12:40 Yes, there are a handful of like PM contracts that we go to... you know, quarterly, things like that. So that is another thing that would definitely be helpful. It wouldn't be necessarily make or break. But if you guys did have the capability to set kinds of reminders for us are kind of on the schedule that, you know, every three months, we need to come back here. And here's what we'll need that would be similar.

--- Purchase decision ---

BRETT

13:06 Absolutely. Alright. So I'll make sure to cover today. Cool. So it looks like I have pretty much everything I need. I'll probably ask you some questions as we continue going through the meeting. But what I'll do is I'll go ahead and share my screen with you. Any questions from your end, Michael that you have before we get started?

MICHAEL

13:27 So I do have one question. I'm not sure how much you with that. So now we'll be able to answer, but I'm kind of been doing some research and speaking with people. I know it was mentioned that there is like the open API for service trade. So is there any more information that you're able to kind of share or discuss on that? Just because we wouldn't be able to want to or we would want to leverage that as best as possible and just for us to have a good idea, you know, what else we can take advantage of that's not maybe like built in but we're able to sort of do ourselves?

BRETT

14:05 Yeah. So you're right? This is definitely not my bread and butter. What I can do for you though is I'm just gonna look it up. I think it's really easy to find. Yeah. So our API documentation is public. It's all right here. What I'll do after our meeting, Michael, if you like what you see, I'll just keep a list of everything that I'm going to send you, but this is one of those things I can send you just so you have everything you need for your evaluation.

MICHAEL

14:31 Great. Thank.

BRETT

14:32 Yeah, absolutely. And so service trade, let me just give you a high level overview with these slides. I won't bore you too much, I promise you that, but that will go ahead and jump right in. Okay. So service trade, we are a service management program designed specifically for commercial mechanical contractors. We did start in the fire protection space. So we work with fire protection, life safety and MVP contractors like yourself. But working with customers anywhere from three trucks on the road all the way up to 300 trucks on the road. And as of today, we've got about a 1,000 customers across the states and Canada. And so leading me here into my mission statement, it's to help commercial service contractors be more valuable to their customers at the end of the day, grow their business. So another way to put that is essentially, I want to turn your service business into a customer service business because realistically, your customers are the most important part of your business without them.

--- Customer engagement ---

BRETT

15:34 Hey, the guys are written ad Infinity probably don't have jobs and we don't want that. So what we do to focus on that is Michael, what I like to call the agent, online customer service. And what I like to relate this to is have you personally ever order something on Amazon prime?

--- Customer engagement ends ---

MICHAEL

15:51 Yes.

BRETT

15:52 Why do you use it?

MICHAEL

15:54 A quick deliberate, usually I can get something the next day or two days if it's available.

BRETT

16:02 Yeah. And it's really easy for you to place that order. You could be sitting on your couch watching the football game last night or something like that, right?

--- Customer engagement ---

MICHAEL

16:08 Exactly.

BRETT

16:10 So, I love that quick delivery. It's really good customer service. You can order Amazon from whatever you want. And you didn't personally reach out to Jeff phases and say, hey, this is how I want to do my online shopping. You just came in. Did he was the pioneer in his market? So what I'm trying to do for Infinity contracting is make you guys the pioneer in your market by offering your customers the best customer service. So they're not going down to Joe schmo. We still on paper tickets down the street because he really doesn't tell me what he did for me when he was on site, right? So some different ways will help out with this. First off, you got the end route notification, which is really that first touch to the customer, letting them know that we are on the way. Customer's going to receive a picture of that text as well as their EPA and Michael, I just sent one to your email. So you'll have a couple of emails from me after today's meeting, just so you can see what all this looks like.

MICHAEL

17:02 Okay. Got it.

BRETT

17:05 Next steps we've got online quotes. So you mentioned, hey, yeah, we do have a quite a few maintenance agreement that we're keeping track of. Them are going out whatever quarterly for this customer. A lot of times my current customers, when they are doing those PMS, they're finding deficiencies or repair opportunities on site or your technicians finding that.

MICHAEL

17:24 Yeah, stuff on.

BRETT

17:26 And how are they reporting those back to the office?

MICHAEL

17:31 Those tickets?

--- *Deficiencies* ---

MICHAEL

17:32 Usually, like I was mentioning where we have to then go read the tickets, transcribe it and create a proposal for the.

BRETT

17:40 Okay. So it sounds like kind of a pain to create that quote.

MICHAEL

17:43 Definitely.

BRETT

17:45 Okay. So what I wanna do for you guys is I wanna make it really easy for the tech in the field to be able to log those deficiencies, you know, take pictures, take videos of what they are actually finding on site.

--- *Customer engagement* ---

BRETT

17:57 So when it does come back to you guys in the office and you're not having to copy paste, it, transcribe all that good stuff, you can just see what the technician found and really easy generate a quote for your customer. And probably the most important thing on these quotes are these pictures or customers today that are utilizing anywhere from three two five pictures on their quotes are seeing increases of 30 to 40 percent and repair revenue year over year. What we like to refer to as pull through revenue. Hey, I'm already going out to do a PM, why not find additional opportunity for work that's just more money my pocket, right? And then at the end of the day, we wanna make that quote really easy to approved from your customer point of view. And we'll go through this process today. Next up, we've got service link is really a fully encompassing post service report that has the ability to go to your customer after that work is complete. So I'm telling your customer which check came out? When did they do it? What did you do?

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

BRETT

18:54 What do you use? But I'm also including if it was a PM and he filled out maybe a startup checklist or a PM checklist step there. If you guys work, signed off on any of those pictures he took on site. The lastly, any deficiencies. So one of my customer does get this service link, they don't have any questions, what they're paying you guys for when the invoice comes because you're telling them everyday.

MICHAEL

19:15 Got it.

BRETT

19:19 Another thing along those lines is our service portal. This is something that could go on your guy's website. Essentially your customers come in and log in and they could see your service scheduled for their location specifically. So today's jobs, upcoming jobs, recently completed jobs, but also a space, how we were talking about equipment history.

--- Assets ---

BRETT

19:36 Those customers can come in and see all of the work that you've done to X, piece of equipment. Why piece of equipment over its entire lifetime at their location? So they're not having to call you guys in the office, they can do it kind of on their time when they want to find that information.

--- Purchase decision ---

MICHAEL

19:52 Okay. Yeah, that would be super helpful. I know that's something we deal with a lot. You know, when did you guys look at our to you one? Let's check and...

BRETT

20:03 Exactly. And I just want to reduce those calls to the office because you guys are busy. Like you mentioned before, the whole reason you're doing this evaluation is Infinity is busy doing the operational side of things. They don't have time to take calls from customers and say, this is what we did six months ago. I'm just trying to make it easier on you guys, right? Cool. So, the last thing here on my slide, Michael is invoice link. One thing I'm gonna point out right off the bat is we are not an accounting system.

--- Invoicing ---

BRETT

20:28 I am not gonna replace spectrum for you, so definitely keep that, but I do have the ability to send invoices to your customers. This was requested by a lot of our customers. Our CEO said we would never do it, but here it is. So essentially, if all your service information is already in service trade, why not give you guys a way to actually send the invoice to the customers as well as take payment from them, exactly what this is.

BRETT

20:52 And customers utilizing invoice link today, do tend to see about a 15 to 20 day improvement in their days outstanding. Really just getting that invoice out faster, getting paid faster, right? So all these things I've pointed out for you, Michael, they've helped our customers significantly increase their revenue. On average customer saw about a 23 point four percent increase. What would that mean for the team over at Infinity?

MICHAEL

21:19 Be huge, probably means more trucks, more technicians, more jobs, and even more web.

BRETT

21:24 Yeah. Absolutely. You mentioned more text there, are you guys doing?

MICHAEL

21:31 Yes, we are.

--- Customer engagement ends ---

BRETT

21:32 Okay. So not really having a problem with the labor shortage.

MICHAEL

21:37 Not particularly, I would say the workforce has been pretty steady if anything, a lot of guys who are like looking for work.

BRETT

21:45 Okay, good. Because I talked to companies that are non union and it's like I've done literally everything in my power to find technicians to work for me and I can't find them.

--- Access to information ---

BRETT

21:53 So union shops are definitely kind of move right now. Alright, cool. Any questions you have for me off those slides?

MICHAEL

22:02 Yeah. I did have a couple of questions. So one thing for like in the field, I guess... is there something that the technicians can use also to sort of see, I guess what they've done in the past at a job site and like see their... previous visits or if someone else was dispatch before them to see what they did?

BRETT



22:27 Absolutely. And I'll definitely show you that when we get to the mobile app to?

MICHAEL

22:30 Okay. Got it. And for that mobile app, does it have like offline functionality if they're going somewhere that doesn't have good service or any service? Would they still be able to see something or would it just not work?

--- Access to information ends ---

BRETT

22:46 Yeah, that's a really good question. So we do have offline capabilities. And the reason for that is I've got a lot of customers specifically in like the fire protection space that work out on ships in the atlantic or the pacific ocean. There's absolutely no service out there and they needed to work.

--- Access to information ---

BRETT

23:00 So reason I'm bringing that up is maybe you guys are in a building, you're in a basement, you don't have service or anything that your text do in the mobile app is simply going to cash into the system. And once they walk out of that building or they get service, all the information is then going to automatically sink back to the home office.

--- Access to information ends ---

MICHAEL

23:17 Okay, great. And then in terms of like those kinds of invoices, and I guess sort of the reporting in different pages that you showed, what is the flexibility in terms of like customization, how much control would we have over how it actually works? Because like I mentioned, a lot of these are city and state agencies. So we need to kind of comply to their standards and follow what they send us as templates for how they want bandwidth of the reports to.

BRETT

23:49 Yeah. So as I go through the demo today, I'll be sure to point out the different areas that you can, and you can't change realistically all the data that goes on the report is going to be your guy's data. It's gonna say nothing service trade related or anything like that. But I'll be sure like on the quote on the invoice on, you know, a checklist that we fill out. I can show you all that today.

MICHAEL

24:12 Okay, great. And those are the only questions that I have so far.

BRETT

24:16 Cool. And I'll say to you is as we go through this, if question does come to mind a lot better to bring that up as it comes to mind versus waiting to the end, a lot of the

times people forget. So feel free to fire away whenever they come.

MICHAEL

24:28 Got it. Will do.

BRETT

24:30 Cool. So the first thing you're seeing here on your screen is our service dashboard. It's the first thing you're gonna see when you log into service trade, but it's really given your office visibility into what's going on throughout the day. So you've got a daily schedule here's. All your text with the jobs at the respective locations there go into. And as your text are going through and completing these jobs, you're gonna see little checkmark saying, yes, I did complete these and I'll go quick refresh, see if anything comes up just like that one right there. And so also on this page, you got a few different, what I like to call bucket first bucket. If you have any overdo jobs that appointments, it's not on the schedule. We're letting you guys know front and center that, hey, you need to go schedule this for the customer so you can go deliver the work and at the end of the day, get paid on a referring to those PM contracts you mentioned, not a deal breaker, but it would be nice if you guys could remind us of these that's exactly what this is right here.

MICHAEL

25:23 Okay. Got it.

BRETT

25:26 So below that, I've got jobs that appointments do in the next two weeks. Realistically, I don't want anything to be overdue for you. So I'm just reminding you two weeks ahead of time to go and schedule it. Okay. But this one right here is really important pass jobs to be marked complete, what it looks like his text, go out in the field, do their work quarter, find their deficiencies, that do their checklist, whatever they need to do once they clock out of that job and complete it.

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

BRETT

25:50 It's gonna jump back to the office. This is gonna allow someone from the office to come in and review it. Maybe it's Stephanie is coming in here, reviewing the work order, making sure parts labor job items are correct. The pictures are they're all that good stuff once she make sure that everything is correct, she simply marketing at complete from the office and it's falling down here to this final bucket, completed jobs to be invoice.

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

BRETT

26:11 If we connect to spectrum, these are just all the jobs that need to be pushed over through the integration to spectrum.

MICHAEL

26:18 Okay. Got it.

BRETT

26:21 And then the last thing on this page is current Peck location. So we're based down in the Durham North Carolina area. I'm out here in Charlotte.

--- Tech On-site ---

BRETT

26:28 So basically when a technician makes o'clock event on a job, we're gonna take a Geo snapshot of where that tech is located and drop a pin on the map. Like I just plugged in route to the job we're working on today. When I sent you that notification.

MICHAEL

26:40 Okay.

--- Tech On-site ends ---

BRETT

26:45 So that's really the dashboard at a really high level. One other thing to point out that you guys might use is we have the concept of offices does not have to be individual brick and mortar offices that you guys have. It can just be different divisions. So for Infinity specifically, if you guys wanted to have a project division and a service division, that might be a really good way to break it.

--- Assets ---

MICHAEL

27:06 Okay. Gotcha.

BRETT

27:09 Perfect. So what I set up for today is an Installation job, this can be a PM job and Installation job, service call, whatever it needs to be. But the first thing I want to show you is kind of how our data model or what our data model follows.

--- Assets ends ---

BRETT

27:23 Because we only work with commercial contractors. I don't work with residential contractors. And at that, I'm only working with skilled contractors. So no pool cleaners know, landscapers, know, pest control companies. This is catered specifically to your guys business. So going off that I've got my ship to information and I've got my Bill to information.

--- Recurring maintenance ---

BRETT

27:43 So if I actually pull up my Bill to today, I understand that as a commercial contractor, I'm the person that receives the Bill might be getting a Bill from multiple different locations. Is that accurate?

MICHAEL

27:55 Yes.

BRETT

27:56 Cool. So whether you have one location or you have 100 locations, they would just be listed out below here. Today, we are working specifically at comcast center. So we're going to pull that up. This is our location or are shipped to. And so Michael I went ahead, I put you here's. My primary contact. I'm going to track every contact that it's location. Okay? The first thing here is services, anything I'm actually delivering to my customer. So whether it is, you know, a phased roll out Installation, whether it's to recurring service or it's repairing a deficiency. It's going to be right here. Let me scroll down into like my recurring services touching on this one more time you mentioned you go out quarterly for those are to use. This right here's. The description of work that you guys do on this quarterly service. We set it up in service trade as a quarterly service. It's red, letting me know. Hey, I was supposed to go out and do this in may of 2020 to read, letting me know it's overdue. And same with all my other services. You guys can set them up on a recurring basis that you go out. So I simply came in here for a quarterly service and said I have the whole month to get it done. It can be a single day or custom date range. And then how often should this occur? I said monthly every three months, that semi annual I'm going every six months. If it's annual, it's got its own town.

MICHAEL

29:13 Got it.

BRETT

29:16 And so all that's there for me under services you've got jobs. It's just a list of every single work order we've done at this location.

--- Assets ---

BRETT

29:24 I'm gonna say job a lot today. It's an interchangeable term with work order. Okay? Then we get down to assets in service trade or the individual piece of equipment you guys are all working on talking about rooftops. Do you currently track that information today?

MICHAEL

29:43 We do, but very loosely not enough that it would be particularly helpful at this current point. But we definitely should be doing better.

BRETT

29:53 Yeah. And Michael, you're not alone. I hear that all the time, a lot of people with their current processes at the end of the day, they really just don't have a good way to track assets. But we found that tracking these assets is really important for a couple of things you mentioned earlier on the meeting equipment history. I want to know every single thing I did the rooftop unit one over its entire lifetime. So when the customer calls me, I have that information. So what I'm getting at is you're not alone, a lot of customers start tracking assets when they join on with service trade. But here's an idea of what it can look like. So I've got a couple of different rooftop units here. Yeah, I can get really granular with the type of information I keep or if I don't have a ton, I can just put what I app so really up to you guys here. But along the lines of service history, if I click into this rooftop, I can see, you know, what are the services we provide for this piece of equipment. So there's all my recurring services, what jobs have I completed here? What deficiencies have we found on this piece of equipment and what quotes have we sent? So all that information's here as you can see, everything is hyperlinked. So it's really easy when the customer does call in to go and find this information for.

MICHAEL

31:03 Got it.

BRETT

31:06 And I'll be sure to show you this from the field as well.

BRETT

31:12 Hello assets. Yep. You'll have another list of deficiencies in quotes at this location.

*--- ST app contracts and pricing ---*

BRETT

31:17 The big thing I wanna point out is contract contracts and service trade are different pricing structures essentially. So do different customers of yours receive different pricing structure?

MICHAEL

31:28 Yeah.

BRETT

31:30 Okay. And how was that manage today?

MICHAEL

31:37 That's a question that I guess. And maybe Stephanie as a little bit more of an insight into from my end kind of being in charge of the operations.

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

MICHAEL

31:45 It was something I just have to make note of and kind of went into a bucket for someone else to handle. So probably not very efficiently are very easily is my best guess.

BRETT

32:00 Okay. Yeah. And we can touch on that in another meeting as well. I'll just make a note of it.

*--- ST app contracts and pricing ---*

BRETT

32:05 But contracts and service trade, high level overview. You can set up different contract price rules for different customers. As you can see, I've got a pretty comprehensive list of different contracts here. And then you can default these contracts to your customers. So when it is time to quote them or time to invoice them, it'll essentially take your guys unit cost, apply the markup give you the unit price for the customer.

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

BRETT

32:26 At any point, you can adjust that further. If you'd like this is just a really fast and easy way to do it with what you agreed on with that customer.

BRETT

32:37 No.

MICHAEL

32:38 I do have a quick question about like kind of those regularly scheduled PM... services that you were showing.

*--- Quote templates ---*

MICHAEL

32:50 Is there any way to set like templates for that? If we know, you know, kind of rooftop units are always going to need us to do like these six items. Is there a way to have that be something set that we can apply multiple different areas?

BRETT

33:05 Yeah, absolutely. And realistically, I don't want you coming in here and type in all that information every time. So I just went to add a new service. I can use a template here. And I think I have like a PM template. I've got all these templates in here, so I can go grab my fall H back template, all my information there.

*--- Recurring maintenance ---*

BRETT

33:21 But it also add items onto that. So my items are on my template, my descriptions on my template. If it's a quarterly, it knows it's happening quarterly. So it's just click a couple of buttons, set it up and we're good to go.

MICHAEL

33:34 Okay, great.

BRETT

33:38 And then on that topic, as far as PM, as you were asking earlier about reminders, I did point out the overdue jobs on the dashboard, but I will show you this service opportunities report which is just something that you guys might run on like a weekly or a monthly basis to make sure you're not missing any opportunity to get this work done. So I can run a report for next month for I've got all different offices but I'll use this one and maybe I say recurring services. So within the next month, what this is doing is it's pinging all my different locations and looking for jobs that are do within the parameters we selected. So ideally you guys would hit select all. I'll just hit a few of these just for the demo, but I know these are all recurring services. So I'm gonna go search for PM... if I have preferred technician that I want to send it these locations, I can put their name in here.

--- Dispatch ---

BRETT

34:28 If not, I'll leave it blank and figure it out when I schedule them just to show you what that looks like is I'm creating jobs for all these different locations here's. When they're do. So, I'm gonna simply show you one more one. He just location as to icon it's. Gonna automatically schedule all three of those services on the same ticket for you guys.

MICHAEL

34:49 Okay.

BRETT

34:50 So from here, really easy to create those five jobs, everything disappears but it does fall over onto our map based scheduler. You can filter that out as you see fit... Zoom out. We'll go out here to the North Carolina coast. So, yes, in Raleigh, you are seeing all these different pins. Those are all different job you have. I'll let me close some of these offices out. So you guys will probably just have one or two offices. This is my demo account. So I do a lot of testing here, but all your text would be over on the left hand side. They're all gonna have a color associated with them that's how we know what tech is going to what location. But with this gray one out here in newburn, gray means that jobs are both on assign an unscheduled. So this is a job that we just added from that service opportunities report. We need to come in and schedule it. So I say I'm gonna sign broke to this job on a drag and drop or it turns orange. And then I'm gonna send Brooke to this job on Friday the fourteenth at gains that calendar letting me know that, hey, there's now an appointment for the fourteenth at eight am gonna take two hours, but broke, my technician also gets a

notification in her email as well as her service trade app that she's going to this job on the forties.

MICHAEL

36:07 Okay.

BRETT

36:09 And this map based scheduler has really just helped our customers kind of a bad example out here. Let's say I am in Raleigh. I've got all these jobs really close together. It makes the most sense to send the same technician to all three of these jobs right here because the right next to each other, let's make the best use of our technicians time. So they spend less time driving and more time working.

*--- Dispatch ends ---*

MICHAEL

36:30 Yeah, definitely. I know that's something that we also at this point definitely have challenges with. And that would definitely be helpful.

BRETT

36:39 Perfect. Any questions on this before I jump out to the work order?

MICHAEL

36:45 So I do have a couple of questions in terms of the text. Is there a way to see kind of like their home location or something on the map as well... just in terms of kind of like you're saying we're scheduling them. We don't want to schedule. Some are across the city if there's two jobs that are a block away from where they are already coming from their house?

BRETT

37:08 Yeah. So it sounds like they're your dispatching them straight from their house in the morning?

MICHAEL

37:13 Yeah, exactly.

BRETT

37:14 Yeah. So my recommendation there, I haven't gotten that question before, but just thinking off the dome here, you could put a location into service trade, say I live in Durham, North Carolina. You could just put a dummy location like Brett house. And that way, you know, here's where Brett starting ease, go into these six jobs. Let's not send them to chapel hill. What's only send them an?

*--- Assets ---*



MICHAEL

37:36 Right. And then another question I have is for the technicians, is there any sort of like profile I guess or something that we would be able to see? I guess like their strengths are the type of work that their best to. You know, we know this guy's really good chillers or something, but don't send them for fans.

BRETT

37:58 Absolutely. So where do I get there user? So what you can do is in mind specifically, I have like my licenses and when you click on that user, you can see their license information. But if you want to put like Brett is really good at chillers, not H back units... or you can put their actual licenses in here if that makes sense for you.

*--- Assets ends ---*

MICHAEL

38:24 Got it. Okay.

BRETT

38:27 Perfect. Alright. Great questions. So far. I appreciate it. And so we're I'm taking a, now Michael, is we're over on the job? The work order, I set up a couple of things for us today. I know you guys did a lot of project work. So I set up a first second and third stage of an Installation all on different days, but I also set up a PM just so you can get an idea of what this information looks like.

*--- Recurring maintenance ---*

BRETT

38:55 So the point being, yes, you can have multiple services on one work order if you don't want to close the ticket every single day. You do not have to, you can do it if you want. But what we have here is what we like to call service granularity.

*--- Assets ---*

BRETT

39:08 So service granularity, meaning all these services, they, you can put different information on them. I did something different on the first stage of the install than I did on the second, but I wanna tied all attachments and comments and parts from the first stage to this service specifically. So you guys know what you're billing for. Does that make sense?

*--- Quote templates ---*

MICHAEL

39:27 Yeah.

BRETT

39:28 Cool. And then, yep, as you can see, these are just setup for all different days here. So coming on down, you will have your parts, your labor, your items. You can see they're broken up by service here. I just don't have items on every single service that's why we're only seeing the two of them.

--- Assets ---

BRETT

39:44 And there's nothing under these. Okay? Then as I scroll down today, we're going to see that, hey, we're working on rooftop unit one. I'm going to show you from the field, what that's gonna look like here momentarily and just to show, you know, attachments, no tricks up my sleeve. We're going to get everything from the field and we'll come back.

--- Access to information ---

MICHAEL

40:03 Okay.

BRETT

40:05 So this is my mobile app, Michael. I'm currently on a iPad right now, we're compatible with both iOS and android devices to whatever works best for you guys phone or tablet. You pick it. Only thing I'm not only thing I work with is like those Microsoft surface tablets.

--- Tech On-site ---

BRETT

40:20 Okay? Excuse, man, but this is my job for today. I can filter by the day. I can turn that off and see all my jobs that I'm scheduled. I like to do this because it keeps a little cleaner... but here's my work order. So, as I mentioned before, I did clock in and route to this job. And what I did is I came in here and notified you as my customer that I was on the way, I sent you an email.

MICHAEL

40:44 Okay. Got.

BRETT

40:44 It. But from here, I'm ready to get to work, clock out of an route, let's clock in on site. This is going to track my hours in the background. Do have a question with you guys being a union shop, are you allowed to track clock events?

--- Tech On-site ends ---

MICHAEL

40:59 So, yes. And it would be something that is helpful for us. But the question that I would have is like how much can we edit or change those? Like sometimes that will happen, a guy doesn't get there at seven, but we're still gonna put his start time as seven. You know, maybe after 715, seven 30. Is that something we can still edit or does it need to go by what that time is?

BRETT

41:23 Yeah. So yeah, you guys from the office has have full autonomy to go in and edit whatever you need to edit to change the workload around for your customer?

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

MICHAEL

41:31 Okay. Got it.

BRETT

41:33 Cool. And I'll be sure to show you that once we jump back to the office. But as far as what am I doing here at comcast center? So under services that's that same information that we just saw from the work quarter in the office. So we're here today to do our first stage, these are the other stages of the Installation, but also here's that PM that I threw on the job, telling my technician, everything that they need to do on site.

--- *Customer engagement* ---

BRETT

42:01 Below that, I got attachments. A lot of my customers today are taken before and after pictures. Again, it's all about that customer experience showing my customer the work I did for them. They hired Infinity for a reason because they have no idea what they're doing in terms of mechanical contracting.

--- *Deficiencies* ---

BRETT

42:16 So let's show the person who's paying the Bill, what we're actually doing for... maybe I come in and I do a before and after picture... and you guys can take as many pictures as you want. You can do videos. You can do audio recording, anything that's going to help you guys in the office as well as the end customer better understand what the technician get.

--- *Assets* ---

MICHAEL

42:41 Got it. And so they're in the attachments, can we also from the office put things like for the technicians? Like if we wanted to give them, like to start a manual or something like that for a piece of equipment, would we be able to do it very semi?

BRETT

42:56 Absolutely. You guys added in from the office on the location level, your technician can see those manuals, those drawings, the maybe a map of where to park, whatever it is.

MICHAEL

43:06 Got it. Okay.

BRETT

43:10 Down under job items, this is where we're tracking the material that we actually used on this job here's, all the items that were initially on my ticket.

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

BRETT

43:19 But if I'm the tech in the field and I realize that, hey, I had to use a widget for this. I wanna make sure we go for it and say, hey, I used for those widgets, they're 15 dollars. And depending if you want your text to see pricing or not, you can or can't turn that off. Everything in service trade is going to be permission based. So you can really pick and choose what your guys?

--- *Assets* ---

MICHAEL

43:39 Okay.

BRETT

43:42 Simply add that in and we'll hit back. But before we were talking about, are you asked me the question? Can text, see, you know, what they did last time at this location? Can they see their previous work quarters? Yeah. So we're gonna go into assets for that asset. Again, my piece of equipment for this appointment specifically, we're working on rooftop unit one. I do have all the pieces of equipment at this location under all. Okay. But if I click into rooftop unit one, number one, I see all the information. I know about this piece of equipment. If I did have to edit it, I could do that net would simply sync up with the office or maybe I found a product number or whatever it is. The size of it. I can enter that in. But at the top, this is where they have full access to service history. So here's every single work order that I've done at comcast center on rooftop unit one and not just meet any technician has done here. So if I go back to this PM that I did on July nineteenth, I can number one see who was the technician that did this on the nineteenth. So with these dots right here, just slide over and say, hey, I was the technician that came out, did this. But under services, what did I do? I did two different PMS. I can dive deeper into those to see what I actually did. I can see if I took any pictures when I was out here.

--- *Deficiencies* ---

BRETT

45:03 It looks like I took an audio recording. I did a checklist and I took a video, so I can listen to that, look at that information as the tech on site. But if I click back here, I can also see any deficiencies. So here's all the deficiencies I found at this location, it looks like we ran into quite a few broken compressors over at this, a piece of equipment lifetime, maybe we need to check the compressor again. Is it working today or do we need to come out and fix it.

--- Assets ---

MICHAEL

45:30 Got it.

BRETT

45:33 And then just one other thing we talked about under attachments, if you want to add a manual for a specific piece of equipment, it might also be who've you guys to put it under attachments for the specific piece of equipment, just so everything's in one central location, right? So either under attachments for the asset or attachments for the job, doesn't really matter but just wanted to give you a couple of.

MICHAEL

45:55 Got it. Okay.

BRETT

45:58 So I wanna make sure that level of service history is going to be good for the guys have run Infinity.

MICHAEL

46:05 Yeah. Something like that would definitely work and makes sense.

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

MICHAEL

46:08 One thing I do have a question about is in terms of like purchasing or like issuing purchase orders, is that something that service trade can handle? And if so, it's something that also like technicians would be able to do or?

BRETT

46:25 Yes. So to answer your question, yes, that is something service trade can handle. We basically how we can do it is to us, text can have the ability to generate the po request from the field or they can continue like the process or if the process today is that let's just start here. What is the process?

MICHAEL

46:48 Yeah. So kind of depends if it's you know, a bigger piece of equipment, something we've got a full proposal for and everything, it would be handled in the office and we would interface with the vendors and things like that. But if a tech is at

a job site and they say, I need, you know, Installation or whatever it is. Sometimes they just run to the vendor, they are able to currently generate the po just from the spectrum app and give that to them and, you know, be with the equipment that they need or material that they need.

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

BRETT

47:19 Okay. So what I can tell you is, so we're looking at service trade today, service trade to the core app. We have a couple of different products. One of those other product is partsledger is a po generation and inventory management tool. I'm not set up to show the inventory side today. Are you guys keep an inventory? And now?

MICHAEL

47:42 So we do have some equipment but for the most part because a lot of our jobs are time and material. If we're taking something kinda from our stock in the shop, what we're doing is we are just ordering a replacement for that anyway, and then taking that invoice to be signed by the client.

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

MICHAEL

48:00 So it's mostly for like emergency use. And so we always have something but we are still sending out a po to replace it hopefully immediately if it is taken.

BRETT

48:13 Okay. I gotcha. So I can show you a po is real quick. Basically what I did there is we're just making sure the job numbers match up.

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

BRETT

48:23 So one thing I want to preface this with is I know this is a web app today within a month to October eleventh. Within about a month. Partsledger is going to be built into the service trade application that we were just looking at. So don't pay too much attention to that one right now.

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

BRETT

48:38 As that comes up or the update comes out, I'll be sure to let you guys know. But the first thing I did is I opened up partsledger. It's connected to my service trade account. So the first thing is that it did is it copied over that same job number for the job the I'm clocked into as the technician. So when I hit that little, I right there, it actually pulls up the information from the job. And if I say that, hey, I need, you know, one of those widgets... I can either select that or on the next page which I can show you in a sec, I can add a new item. Let's say, hey, I'm gonna order this part

from acne supplies and I'm gonna create a new po. So this is the area where I can add a new item in here or add from the existing list on this job. So maybe I come in here and say... I need this black light. I need... 10 of them. They cost eight dollars a piece. So I can add that to my PM. So we can see both those items down here and simply finalize the po right here. I can add a message up top if I say, hey, I had one of these but it was broken, just kinda let the office. No... let's try it.

BRETT

50:03 You try finalizing that. Yeah. So I think what happened there? Is that widget wasn't part of my partsledger codes as you can see kind of starts with po here. So there were.

MICHAEL

50:14 Yeah.

BRETT

50:16 It worked. It worked there for me. Basically what I just did as a technician is I created the po. I did not issue the po, but this is me letting the office know that, hey, I created po number 414 for this black pipe. I can send an email maybe the office to notify them that I created this. They will get notified anyway. But this is also an opportunity for my text to go in and take a picture of the part that they need or the part that's missing, whatever. It might be, just further information that we might share with the office.

--- Access to information ---

MICHAEL

50:46 Okay. Got it.

BRETT

50:48 Hello, simply hit done there. And that's pretty much it and what I just showed you. So, yes, text can create it in the field. If you don't want text to have that on top of me, we can just bring it back to the office and might be everything be done from the office. I would just go to the same website that I did from the office to go and do this.

--- Parts management (inventory) ---

MICHAEL

51:08 Okay, got.

BRETT

51:09 It. And then from there, I will take you partsledger.

BRETT

51:22 See that's? Not what I wanted.

51:30 That's...

BRETT

51:37 All right. So in partsledger, you can see over on this left hand side, I've got this navigation pain. There's a lot of different things I can do an partsledger. We're just talking about po is today and so we're going to go over into our purchasing section here's.

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

BRETT

51:53 That purchase orders. And so you'll be able to see every purchase order that's been created, including the one that we just submitted. There's 414 right there. But you can see all this information. So the po number, the status issue date, and you can really filter this list based on what you need state. So every page is gonna filter button... but we're gonna click on number 414. For that one that we just created. You'll see the po is for acme supplies, right here. The line items that the tech put on the po are all right here. And in the notes field, if I had filled out anything, they would be down here along with pictures. So from here, I can click this edit button and this is what allows the office to go ahead and edit this po before we actually issue it. So maybe I need to come in and I realize, hey, we actually need to do the eleventh or maybe I want to come in and say, hey, we're ordering these for this sales order, which is this job that we're working on today. But I also want to add... by something else from this vendor. It doesn't have to be tied to a sales order. I can order it for inventory in that I would do that process there. And I would simply just go through change what I need to change and submitted. So my last step here is to actually go in, issue this po. And when I click issue, you know, everything changes right here. And this can be done in a couple of ways. When I issue an email can be sent automatically to your guys vendor send them the po. You guys can download a PDF and send it that way or you can call it in depending on how you guys issue those today. And so that's really how we, you know, create the po is inside of partsledger. If I take you real quick back to the service trade job... you can go down to items, whether it's that black pipe that I just added for Mac, the supplies there's, my po number attached to it. Okay? So go... going back in here just to take you through the full process. If I click in purchasing again, let me go and receive that shipment. So when you click here, you'll be able to see all the posts that have part that needs to. Be received. And when you enter shipment receipts, that can be based on when you guys physically received parts or when you receive the in the vendor invoice, I've got customers doing both. So totally up to you what you guys wanna do there. And I'm gonna click on a couple of these Rose. Let me actually... I'm gonna do that black pipe and that wire that I ordered. So what I'm gonna do is click this autofill button. All that does is it populates all the information, so I can go and change it. So maybe I say, hey, I ordered 11 of these types, but I only got 10 when I received the shipment, I can change that here and I can hit receive. This is an opportunity for you guys to put it in your invoice number or Bill of lading number, whatever. It is just a way to track this, these parts again and you guys to review what you're actually receiving. I would simply come in and confirm that and close that out.

MICHAEL

55:06 Okay. Got it.



BRETT

55:08 Last step there is I really, I just received the shipment. So let me go back to my service straight job, hit refresh. And we can see that, hey, there's those 10 black pipes that I received. I'm still waiting on one of them and then you guys can run reports and service trade that tell you, hey, show me all of that job that I'm waiting on parts for this would show up. I'm still waiting on that one.

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

MICHAEL

55:35 Okay. Yeah. I know that's something that actually would be super helpful because that's something that we face a lot, you know, they said five things we needed 10. So where the rest of them. And right now it's not really being tracked unless someone 10, remember?

BRETT

55:51 Okay. Yeah, no, I'm really glad we went through partsledger today that was just touching the surface. That's pretty much as I know on the partsledger side, I'm really a service trade expert. If we want to bring the team in, if we get there, I can bring in my solutions architects to further go through partsledger and its capabilities.

MICHAEL

56:12 Okay. Got it.

BRETT

56:14 Cool. So taking you back out to the field, finished going through that mobile app.

--- *Forms* ---

BRETT

56:21 So a couple of things we haven't been over yet. You mentioned your customers have very specific forms we need to fill out. It's typically city or government agencies we can work with that. So I'm gonna come down here to view more details. It's gonna do exactly that to show me a little more information. What I'm gonna do is hit actions were gonna download blank paperwork. So we're gonna take your guys that you need to fill out. So maybe the city or government agencies provide you with forms that you guys need to fill out. We can put them right into service trade like this and only the correct forms will be dispatched based on the service that you're technician is doing on site. So I'm just gonna grab one of these as an example. We're going to generate. What this does is we actually opened it up through Adobe acrobat and that and Adobe enables us to smartphone these forms on site essentially making less work for your technician.

BRETT

57:21 So all my, what I mean by that smart Bill, all my information from my service trade account flow down to this work order. He's not there to do admin work. He's

there to do skilled labor. So let's let them do is inspection, you know, fill out this form, whatever he needs to do, whether it is, you know, checking off the boxes can do that here, whether it's free form information, I can do that here.

--- Tech On-site ---

BRETT

57:44 But once I'm done it's really easy for my technician to simply add this back to the work order. And then your customers forums are within the work quarter that you guys will review at the end of the day.

MICHAEL

57:54 Got it.

BRETT

57:57 Just send the copy. We know that we're clocked in here at comcast center. It knows it. So we just upload right there.

--- Deficiencies ---

MICHAEL

58:05 Okay. Got it.

BRETT

58:09 And then with that, you mentioned how your technicians today are just throw in those deficiencies on the phone with PDF. I want to give you guys a little bit easier way to do that and an easier way to transcribe that information from the office. So, if I come in here and I say that, hey, Michael, I found a broke, I found a broken compressor today. I don't have to be crazy descriptive on that because I can come behind that and add more detail. What I mean is let's take some pictures. Let's tell the story of what I've found on site. So there's my broken compressor, something that technicians really like is this audio recording, they don't have to type anything. It, they can come in and say, hey, Michael, Brett onsite found this broken compressor rooftop unit one, it looks like I need to fix X, Y and Z. I'm gonna need these parts. It's gonna take me three hours.

BRETT

59:03 From there, I'll mark the severity. I'll call this an inoperable deficiency. I will tied it back to the asset that I found the problem occurring on giving us that really Rich service history service trade knows, this is an H back job selected for us. I last step is I'm gonna mark the status of this deficiency and we're going to say it's new because I want to quoted out for the customer.

--- Deficiencies ends ---

MICHAEL

59:22 Okay.

BRETT

59:24 Any questions there?

MICHAEL

59:29 No, I think that Pardot instance.

BRETT

59:31 Okay. How are you doing on time by the way?

MICHAEL

59:36 No pressure on time for me.

BRETT

59:39 Right. Putting you about 10, 15 minutes if that's cool.

MICHAEL

59:42 Yeah, definitely.

BRETT

59:44 Right. So, my last question for you, Michael, your text when they're on site, whether it's an install or service work, are they getting their work signed off on?

--- Forms ---

MICHAEL

59:54 Yes, for the most part, they always have tickets that they'll need the customer to sign.

BRETT

59:59 And is that your customers form or is that a standard?

MICHAEL

1:00:03 Those will be the customers calling?

BRETT

1:00:05 Okay. So for that, we would go through that same process. As far as the more details, taking the customers form, getting it signed, I can put a signature in that billable document.

--- Tech On-site ---

MICHAEL

1:00:15 Okay. Got an...

BRETT

1:00:17 So from there, I'm gonna simply click out of this job. Let's say yes, like finished everything they asked me if I'm done with this visit. So I hit yes. If I was, you know, going on lunch or something, I would hit no, and I would come back to this. Okay. But coming back to our work order, couple of things happen. So job status currently says in Progress. However another appointment, it says completed. I've done everything I need to do. I know we're kind of budgeting this little bit because this is a three day job, but we're doing a demo.

--- Quote templates ---

BRETT

1:00:49 So I'm gonna go ahead and complete everything and just to show you a couple of things, hey, there is our parts that we added from the po. What I wanna do is make sure all my prices are correct. So it looks like I don't have a price on your labor.

--- Tech time tracking ---

BRETT

1:01:05 Add that in it will let you know what the standard cost inside of service trade is. So it's zero. In this case, just show you. I can make changes. You asked me earlier. Can we edit clock events? Yes, we can couple of things about clock events. I was in route for 24 minutes.

--- Tech On-site ---

BRETT

1:01:22 I was on-site for 20 minutes. The one I didn't go over was job Brett, but it's just another clock event option. But if we want to say, hey, says Brett started this job at 1,217. I'm gonna say no, you got there at 12 o'clock... that's really easy for me to edit that.

MICHAEL

1:01:38 Got...

BRETT

1:01:38 It. And then this will track where your text are and location to a customer location. I'm in Charlotte important 50 Miles away from New York City. So it's gonna flag it and let you know, hey, you probably need to talk to Brett. That's kinda questionable.

MICHAEL

1:01:52 Got it.

BRETT

1:01:55 And moving on down so that's deficiency here's. That broken compressor. I've found this is not the only way that you guys are going to get notified of this deficiency. You will also get an email notification. So there's my inoperable deficiency reported at comcast center. There's my broken compressor. And here's this link that takes you right into service trade or the person who's doing the quoting right into service trade. I don't have to transcribe everything. It's all right here for me. Got it. So there's the deficiency I just found a couple of minutes ago. Here's everything I've found related on this piece of equipment in the past.

--- Quote templates ---

BRETT

1:02:29 Again bunch of broken compressor might look deeper into that one. There's my attachments. So I've got to listen to the audio recording. I could see that picture and understand what I actually need to quote out. So I can add this to a quote right here. And now, as far as your guys verbiage, you can put whatever you want in the quote description, same with your parts, your labor, your items and your service. Really, you asked me about templates earlier as far as doing the, those services and we just put a template and make it easier. Yes, I can also do that on quotes. So if, you know, I do a lot of compressor replacements, I might have the general description for this type of work as well as the parts that I use. And you guys can at any point come in and change this as you see fit. Every customer's. Going to be a little bit different. You're probably gonna have to change it, right? Okay. Then I can come down here to my parts, my labor, my items, I can make sure everything's correct.

--- ST app contracts and pricing ---

BRETT

1:03:31 Why don't I have a price on that or on... that one blank. So we will be tracking your gross margin on this job making 72 percent. It's pretty good. You guys can pick the level of detail that you want to share with your customer. You mentioned a lot of your jobs are TM.

--- Quote templates ---

BRETT

1:03:49 So maybe we select that... you can also pick that pricing contract. So this is the one that defaulted to this customer. But if I need to change it, you can see it changes those markup rules automatically. And then of course, if you guys are tackling customers or not, we can throw that on here.

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

BRETT

1:04:09 Okay? So everything's good to go. What I'm gonna do Michael, is I'm gonna send you a quote. Do you have access to your email?

MICHAEL

1:04:18 Yes.

BRETT

1:04:20 Cool. So, I'm gonna send you this in a second just to point out before I do, you guys can pick and choose what the customer sees. So Brett cursed a little bit. We don't want the customer to hear that during the audio recording off, but we do want to include that picture. It tells that story. So you're gonna receive an email from me here in about 30 seconds. It's gonna say quote from service trade. And at the bottom, it's gonna save you and respond to quote if you can hit that.

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

MICHAEL

1:04:43 Okay.

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

MICHAEL

1:05:01 Okay. Got it. I see it.

BRETT

1:05:04 Alright. So, yeah, the reason I wanted you to pull that up if I just want you to see or get to experience how Infinity customers code received quotes in the future. If you go with service trade... where it says aardvark at the top, that's where it's gonna say Infinity logo, really anything on this quote. As far as description you guys can change, it's going to be your t's and c's at the bottom. It's gonna be your part to your pictures. The only thing you can't change is where those approve and request change buttons.

MICHAEL

1:05:33 Okay. Got it.

BRETT

1:05:36 Cool. Do you think infinities customers would be receptive receiving a quote in this manner?

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

MICHAEL

1:05:47 Some of them potentially, I know a couple of them probably not, but I think it really just depends a lot of the city and state agencies are at this point still very behind the times. So... for us, you know, we might love it and they would definitely simplify things, but it really is kind of fat their whim, and if we can celebrate it, you know, I would be helpful, but I have worked with them in the past, so.

BRETT

1:06:20 Understandable. Yeah, you're not the first company that works with government or city agencies. So I very much understand that you mentioned a good point there. If we can sell it correctly. Yeah, it might work that's exactly what our customers are doing. They're saying, hey, we purchased the software.

--- *Customer engagement* ---

BRETT

1:06:36 This is how we're going to communicate with you guys moving forward, you're going to get quotes that look like this invoices that look like this service like that, look like this and really preaching that customer engagement. I'm trying to show you mr customer, everything that I did for you guys on site.

--- *Quoting* ---

MICHAEL

1:06:51 Right.

BRETT

1:06:53 Cool. So, Michael, if I can have you approve that quote, I can show you how quick and easy it is to turn it back into a job.

MICHAEL

1:07:00 Yeah.

MICHAEL

1:07:08 Okay.

BRETT

1:07:10 Alright, thank you, sir. And just to let you know, you can get email notification like, hey, Michael viewed this quote. I'll get one of the second that says Michael accepted this quote. It'll look like this one right here. And, but from here, once it has been approved, you guys can really easy added to an existing job. It's already on the schedule. Let's you know, decrease the amount of drive time that my text you're doing or I can create a brand new job from this. I'll throw a do day in for next week. I'll copy over all attachments and comment. And if this is a quote for project work, I can go in and create a budget for this job.

--- *ST app contracts and pricing* ---

BRETT

1:07:48 So here's the work order. My last step would be to actually schedule that and I can do that via the map base schedule that we covered earlier or I could do it right here. But with that budget, I can also click into that budget. I can see, you know, what are my costs associated with this approved quote? Am I making sure that I'm

tracking within my margins? I can then lock this once we do go and do it to make sure we're not going outside of that margin or that budget.

MICHAEL

1:08:14 Okay.

BRETT

1:08:17 So that's really quoting in a nutshell. So taking you back to our initial work quarter attachments.

--- Tech On-site ---

BRETT

1:08:24 There was nothing here before I got three attachments. Now. So here's that paperwork that I filled out as a technician on site, all the changes I made her there. You guys can review it. You can also change it from here if you.

MICHAEL

1:08:38 Okay.

BRETT

1:08:40 There's those before and after picture that I took on site. So once maybe Stephanie is in here, she reviews everything. She make sure everything is correct. She's simply going to complete this job and say complete and create invoice. So this page right here is an opportunity for you guys to review your contract price for this customer, make sure for your contract, make sure it's correct, but also a chance for you guys to review your unit cost.

--- Invoicing ---

BRETT

1:09:06 So I'll make sure everything's good. I'm gonna take these two out... and we're going to create this invoice. So this is my pro forma invoice inside of service trade. At the top. You are always see in your margin here's. All the items I used. I can open this up.

--- Quote templates ---

BRETT

1:09:24 I can motor my quote, change the level of detail that my customer sees on this. Maybe I do this one and maybe I say we're taxing... so I can see, I'm making that 65 percent margin. If there are any additional notes that you want to add for the customer, I can add them here.

--- Quote templates ends ---



BRETT

1:09:40 I can quickly add services, things like that like this. Just a couple of clicks of a button, technicians save. And then from here, I can do a couple of things. So yes, I can push this invoice over to spectrum. We need to have that call to cover how that's gonna look.

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

BRETT

1:09:58 I can also, I can also send that invoice via service trade. If I send it via service trade, I'll send it to you so you can see how it looks... and I'll pull it up here so we can talk through it. So Infinity contracting at the top, this is going to be all of your guys burbage here. You're letting your customer know that, hey, they have a 6,900 dollars. They have any questions, what they owe a 6,900 for? They can click this button right here. This is our service blank telling that customer everything we did for them. So your guys logo here's, who the tech was when he came out, what he did, what he used... under files. Hey, there's your customers form that you were requested to fill out... there's, those pictures. And lastly there's my deficiencies. So letting my customer, no, everything. So they're not confused what they're paying that money for?

BRETT

1:10:57 Do you think I know a little different with city and government agencies? But do you think they would be receptive to receiving, you know, their forums, their pictures in this manner?

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

MICHAEL

1:11:06 So at least for the invoices, I know it's something they are a little bit more stringent about. So, if you go back to the other view, actually, would there be any way to have those attachments here? Because that's kind of how it works like pretty much of breakdown like this. And then it's you know, the tickets from every day that the guys were there backup?

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

BRETT

1:11:33 See, I don't think there's a way to have the pictures on the invoice?

MICHAEL

1:11:38 Hello?

BRETT

1:11:39 Without clicking that link.

MICHAEL

1:11:41 Okay.

BRETT

1:11:44 I'll check on that for you. I feel like there's a way, I just don't know it picks on invoice. So let me get you a better answer on that, but I will confirm either yes or no in an email after today's meeting.

--- Invoicing ---

MICHAEL

1:11:59 Okay. Got it.

BRETT

1:12:03 The other option there, if you're not sending invoice link as a service trade, like I was saying, we can send it over to the accounting system. We have that call on the coming weeks coming days, but it's essentially, we need to figure out what information do you guys want to move from service trade into spectrum.

--- Invoicing ends ---

BRETT

1:12:21 Are there specific data points that's kind of what that call is going to be about? And then from there, we can give you a better idea of what information will move over.

MICHAEL

1:12:31 Okay. Got it.

BRETT

1:12:34 But right there, that pretty much brings me to the end of a high level overview of service trade.

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

BRETT

1:12:40 I'm just reviewing my notes here. I wanna make sure I touched on everything. Really. The only thing that I'm seeing I haven't touched on is reporting. And so for that couple of things we talked earlier about, hey show me all the jobs with parts to be ordered or parts ordered.

--- Invoicing ---

BRETT

1:13:00 But not for Steve, really easy to run that report that a service trade right here here's, all my job that I just haven't received parts on yet. As far as what you asked,

me, as far as reporting, you want to see what's been billed, what's been paid? So invoices. And so I can get really granular with all these different parameters here. If I wanna see, you know, what's been fully paid, customer invoice or vendor Bill, we're gonna say non recurring invoices and show me everything that's been paid. So this is a demo account. I don't pay thing. I just create things here. Actually, this might be it. There we go. I have a couple that have been paid just for, but I can see all these have been paid right here. Really easy to bulk, send these over to the accounting system or bulk, update the status, whatever it might be that maybe I wanna look at the things that haven't been paid.

--- Accounting ---

BRETT

1:13:58 And then it might make a little more sense to bulk, send these back out to the customer.

MICHAEL

1:14:03 Okay.

BRETT

1:14:05 And then Michael, all this information that we're looking at, it can be export it into a spreadsheet. So if I go invoice details right here... pull this up. So I have sheets on my computer.

--- Quote templates ---

BRETT

1:14:18 I don't have excel, but whatever you have... it will flow into that. And this is how you'll be able to read it. So I can come over and see, you know, there's my total there's my gross margin. All my information is here. Is that kinda what you're looking for?

--- Purchase decision ---

MICHAEL

1:14:38 Yeah, I think something like that should be helpful.

BRETT

1:14:43 Okay. Cool. Well, is there anything from your eyes that, you know, I haven't covered yet today that you were hoping to see... wasn't something?

MICHAEL

1:14:54 I was hoping to see, but it was something I thought up along the way that I did have a question about in terms of like the hours for the guys.

--- Tech time tracking ---

MICHAEL

1:15:02 Is there any way not really to track like payroll but like time sheets or like weekly time for the technicians? Is that something that... you're able to do or?

BRETT

1:15:15 Absolutely. So we have a product called time card service timecard. Essentially, we can go through it. So in the field, you notice how, you know, my text, let me just go back to a work order.

BRETT

1:15:38 So on this, I track time in two different ways. I had H back labor as a line item, but I also had clock events. So those are two different ways that you guys can track time. You don't have to do both or you can do both and you can pick and choose how you want it to flow into that time card. Essentially, I would come in here and as a technician time card is a way for me to submit my hours at the end of the week to my manager can then come in, prove that information. And that's how we get payroll service trade itself, will not do payroll. Let's go look at clock events. So here's all my clock events from last week, you know, I'm doing demos. So I don't have really all that much, but this is also a chance for your text to go in and put, you know, I was on vacation on Monday for eight hours... put that in here. Maybe I had a meeting on Thursday for two hours. I can go into, edit my time card as I see fit. Also important to point out, I'm an admin in this space. So I'm seeing both submit time card and review time card. Your 10 technician is only gonna see something that says like my time card?

MICHAEL

1:16:53 Hello?

BRETT

1:16:54 They can go through, adjust this and I could say, hey vacation time... pre-approved whatever it was. If I could spell, that would be nice and I can submit this. What that's gonna look like is, hey, Brett submitted a time card. The manager gets it. They can come in and review it. They can certify that, hey, all these hours are correct. These are all hyperlinks back to the job. So I can go reference all this information, make sure the time is correct. And as a manager, I can either request to change and say, hey, your hours for Tuesday are way off. How did you work 66 hours in one day? That's not possible? Or I can come in and simply approve it. If I request it, I request change... I would get a notification in my email... saying, hey review your time card. I would go back and fix it, go through that process, adjust what I need to adjust. And then I can come back and certified to be true?

MICHAEL

1:17:55 Got it.

BRETT

1:17:57 And then just to show you kind of what that looks like, there's a couple of different settings on time card. So you guys can add additional Rose. If there's a different things that you need to track whatever it might be, you know, shop time at

that. And I can start on whatever the day of the week I need. I can base it off different clock events. So you guys might be tracking job prepping, your service trade app, but that's not something you pay your technicians off. I would turn that off. If you want comments to transfer over time cards. You just pick here. Yes or no. You guys can also track expenses. So if texts or, you know, buying gas by in parts, go into home depot, whatever it is. They can track that on their work orders and that will funnel over the time cards. So they get reimbursed... notifications. It's just all those emails you told me getting about the time card... templates, settings. We would, what do you guys use for payroll view as a service?

MICHAEL

1:18:56 We use spectrum for the payroll as well.

BRETT

1:18:59 Perfect. So we would just need to create a template based off spectrum.

--- Accounting ---

BRETT

1:19:04 So this is just one that I created. Basically there's different columns that you can select as far as how they map over. And so job number in service trade might be called job number, but spectrum, my call ticket number and we would call this ticket number. So just making sure the things map over from service trade to spectrum correctly? This is creating the import template that we would import time tracking information into spectrum for payroll purposes.

--- Tech time tracking ---

MICHAEL

1:19:32 Got it. Okay. Yeah, that would definitely work.

BRETT

1:19:37 Cool. And then, yeah, you can go through. Are you doing job items? Are you doing clock events? Are you tracking expenses? And then any time, if you were to add a new user and service trade, I hit this button. Everything sinks over. You can pick and choose, you know, who manages time cards, who's simply just a technician. I'm an admin. So again, that's why I'm seeing everything. But last, there is other settings and it's just what offices do you want to base this off of? And then, you know, different formats. You can put the ship to answer your question in a really long way. Yeah, we can do time cards.

--- Purchase decision ---

MICHAEL

1:20:13 Okay. Got it. Thank you.

BRETT

1:20:15 Absolutely. So what I want to pull up last thing here, Michael is what I've been doing on my end, I'm just doing this job for a couple of years is it's really hard to stay organized. There's a lot of things are a lot of information I shared with you today. I don't want some of that stuff to go unnoticed. Are on talked about when you talk to the Infinity team. So what I set up is this workspace, it's called recapped. It's a software that service trade just bought in order to better collaborate in this sales cycle together.

--- Purchase decision ends ---

BRETT

1:20:45 Would you be open to setting up with me kind of next steps in this process just to keep us both better organized?

MICHAEL

1:20:54 Yeah, sure. No problem.

BRETT

1:20:56 Awesome. And what I'll do is I will actually share this with you. So you'll get an invite after our meeting and you can come in and see this is also a place. Hey, we talked about partsledger today. We talked about time card today and service trade. I'm going to put a bunch of resources over on this left hand side that when you do talk to the Infinity team, you can just pull up recaps and have all the information.

MICHAEL

1:21:15 Need, got it.

--- Purchase decision ---

BRETT

1:21:17 So we did our initial demo today. I'm gonna mark this as complete... and I'll put you on after our meeting. I don't wanna waste too much time with it. But as far as next steps, we're probably gonna have to like you said, bring in the people from Infinity. We're going to have to get their thoughts on it. They're the people that are gonna be using every single day. We're going to have a scoping call for spectrum. We should probably go over partsledger and POS and a little more detail. But what is your next step in this process?

MICHAEL

1:21:48 So my next step is going to be first talking to Daniel kind of about this and then talking to the Infinity team as well. That recording they said you're going to have I'm hopefully going to share with them. I know at this point, it's almost an hour and a half. So I don't know, you know, if the watch all of it or how soon they'll be able to watch all of it, but that I'm sure we'll take a couple of days. So I just wanna make sure kind of cover everything and then have a couple of meetings with them. Realistically probably like the beginning of next week... we will kind of reach out to then see what those next steps are for us. And I think that gives us enough time to kind of do our part, kinda review what I've seen, pass on that information and have everything in a

good place to feel ready to go forward or to, you know, decide that it's not gonna work for what we need.

*--- Purchase decision ends ---*

BRETT

1:22:55 Okay. So what if I call you on either Monday or Tuesday of next week to see kind of how those internal conversations went and determine, hey, do we want to dive deeper in or is that not?

MICHAEL

1:23:06 Yeah, that would be good. I think Tuesday should be good. Just have a week to kind of go over it with everyone.

BRETT

1:23:13 Lately. Okay. And then I'll just go with, go ahead and put a couple of other things in here like... that's. Not what I wanted. So I do.

*--- Purchase decision ---*

BRETT

1:23:38 And then... these are just things I'm thinking of that we might have to touch on. We can always change this as we see fit. But talking about that demo recording, Michael, what I'm gonna do is I'm going to fill out this space with everything we talked about in the beginning of the meeting, I'm going to drop the demo recording right here is going to be a link to it.

*--- Purchase decision ends ---*

MICHAEL

1:23:58 Okay, perfect. Yeah. And I think this will be something helpful kind have to share with the team so that they can kind of see it and get a to still version of all that information as well.

BRETT

1:24:08 Exactly. And then my last thing there is if there's you know, people from the Infinity team that you want me to just share this with them. I can send it directly to their emails. They can get reminders about it, things like that. So just let me know if there's anything I can do to help you better facilitate this process internally.

MICHAEL

1:24:27 Okay. Got it. I think for now, if you can just share this with Daniel to, that would be the most helpful. But... other than that, if something else comes up, I'll definitely reach out and let you know.

BRETT

1:24:39 Absolutely. And what's Daniel, his last name?

MICHAEL

1:24:42 Let me get the spelling.

MICHAEL

1:24:50 It's REM... ISZ... EWSKI.

BRETT

1:25:02 I would definitely want to have the check spelling on that one too. Alright. Let me just copy your email instances. Cool. So it's not updated yet. I'm gonna put some work in at this afternoon, but this should be in your inbox right now.

MICHAEL

1:25:19 Okay, great. Thank you.

BRETT

1:25:21 Absolutely. And Michael, thanks so much for your time. Want very last thing I'll point out is, hey, you and Daniel got questions comments, you need information from me. Really easy way to do it. If you don't want to call me, feel free to call me anytime, but feel free to leave a comment here as well. Hey, Brett. I need X, do you do this, whatever it might be? If you leave it here, it'll go right to my inbox and I'll come in here. I check this like 10 times a day.

MICHAEL

1:25:45 Okay. Got it. That sounds great. Must have some time with him. We'll definitely sit down and discuss and kind of come up with a game plan on our end.

--- Dispatch ---

BRETT

1:25:54 Absolutely. Well, that being said, Michael, it seems like service trade could be a really good fit for Infinity based on everything we talked about today. So I'm excited for you guys to deep dive in. I'm excited to hear from you next week. But if you need anything, please don't hesitate to reach out.

--- Dispatch ends ---

MICHAEL

1:26:10 Got it. Yeah, thank you so much for your time and thank you for showing me everything.

BRETT

1:26:13 Absolutely. You have a good day.



MICHAEL

1:26:15 Thank you. Same to you.

BRETT

1:26:17 Thanks. Bye bye.

*The End*