



ServiceTrade Demo with Horizon Mechanical

Alec Ashby with Horizon Mechanical Contractors of California
Recorded on 8/7/23 via Zoom, 2 hour s 31 min.

Participants

SERVICE TRADE

Alec Ashby
Territory Manager

Emily Whitehurst
Territory Manager

HORIZON MECHANICAL CONTRACTORS OF CALIFORNIA

John Gordon
Owner

Robyn Twombly
Office admin

Magali Kimball
Accountant

OTHER

Bob Kimball's iPad

Phone Caller #1

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Transcript

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

--- Call Setup ---

ALEC

0:00 Hey, Robin. How are you?

ROBYN

0:01 I am not, I think you.

ALEC

0:04 Got you. Got John in here as well. Hey, nice to meet you virtually.

ROBYN

0:10 Hi, now, right?

ALEC

0:12 2023 right? Right?

ROBYN

0:17 Yep.

ALEC

0:18 Yep. Gotcha. And then how do you pronounce your name? I do not wanna put your name.

MAGALI

0:25 Hi, Allie.

ALEC

0:26 Magali. How are you doing today? Magali?

MAGALI

0:28 Great. Doing great.

ALEC

0:31 Awesome. Okay. And then we got John in here as.

ROBYN

0:36 Yep.

ALEC

0:37 Okay. Good to go there... Bob. Okay. Got you. Yeah, I saw him on the invite too, so we can give him a couple of minutes, but how's it been out there? A lot of our people are super busy right now. I do appreciate you guys speaking with me, but how are you guys super busy, somewhat busy, controllable?

MAGALI

0:59 John?

JOHN

1:01 Yeah, are...

BOB

1:05 It's buried.

ROBYN

1:07 It's...

MAGALI

1:07 Just a semi here, so.

JOHN

1:12 Thank you for doing on short notice. We got kinda hung out an alert with the one we're onboarding with the other program, and it's just, dammit, shut these people up. There we go. We got because we got hung up to drive. We looked at you guys a couple of years ago and I don't know why we didn't come back to you, but it just seemed like at the time, this other company was gonna fit our needs and it's proven to be a tragic mistake. So.

ALEC

1:53 Yeah, yeah, no worries. And yeah, yeah, no worries to both of those. But just know you're not alone build ups, we run into them quite a bit, and you're not the only company that has done that. So no worries. We can wait for what's his name? He.

ROBYN

2:15 I get into it.

MAGALI

2:17 Okay.

ALEC

2:18 Okay. Yeah, cause really just so you know, the way these first meetings goes, we just wanna make sure service trade is a good fit for what you're looking for. We can get into more things later. But essentially how this works, I just want to get to know a little bit more about your guys company, what you're kind of looking for, maybe some of the struggles with some of the vendors you guys have gone with this year. I have some really good notes from Emily. But once I get a better idea of that, we'll hop in the platform, I'll kinda show you what we got so to speak. And then if you see this as a viable option, we can definitely talk next steps from there... as far as you guys though, you know, I know you kinda just told me a little bit about, you know, that tragic decision. I was looking back at the history because it seems like we've talked to you guys quite a bit, but it seems like you guys were on service auto pilot, then you got on sky boss, then sky boss bought out or something you went to house called pro that didn't work out.

JOHN

3:14 Yeah.

MAGALI

3:14 We never even went on it. We're still on skybos.

JOHN

3:19 Going dark September thirtieth and that's where, our big issue is right now is, you know, we need to, you know, kind of pick up the pace now that we.

ALEC

3:33 Down a date road.

JOHN

3:35 We still got to get to the finish line. So that be said, I guess, I mean, do you want us to want me to give you a kind of a broad statement of what we do?

BOB

3:50 No, I think.

ALEC

3:51 I have a pretty good idea. I would hate for you to go through that. But just this is what I got from Emily.

--- Call Setup ends ---

ALEC

3:57 Correct me if I'm wrong, but essentially, it seems like you guys do a lot of boiler work. Seems like you have a good mix of like multi day jobs, preventative maintenance, and then just break fix calls. Seems like you also do some pop repairs, retrofitting. Seems like your work is somewhat niche work with a lot of military college campuses.

MAGALI

4:20 Sounds like did she go into our system? I think I gave, it was Emily, I gave, my log in to skyboss so she could go around. I don't know if she did or not or this you got from John may?

JOHN

4:31 I mean, I know you're hitting at all spot on pre, me, if I'm wrong guys.

MAGALI

4:36 Look at it.

ALEC

4:38 Yeah. I mean, I did just, I was actually on a meeting when this got passed over to me because the lady you were supposed to speak was sick. So I just kinda briefly went over your website and looked at that, but it seems that's all accurate. It seems like.

JOHN

4:54 Yes.

MAGALI

4:55 Okay. Really, the main thing that I...

ALEC

4:59 Kinda wanted to better understand is I know that sometimes when you buy software and it doesn't work out, you can kinda get in this pattern of just like we need to buy something, we need to get something which is, you know, makes sense, right? But I kinda just want to know from a higher level, like what are you like really trying to accomplish? Like what do you want the software to do? Are you guys in growth mode or you guys, and just keep it steady? You know, just need to kinda optimize things or like what are you kind of really trying to accomplish with the?

JOHN

5:29 Everything about we are in the growth mode. We don't want, we don't we're trying to manage our growth. We don't want to try and do the stick the you get in trouble. But that be said, you know, we just want to be able to, you know, manage our customers well.

ROBYN

5:51 And efficiently and then also give our guys the tools and the...

JOHN

5:55 Field so that they can work.

ROBYN

6:00 I think one that we keep running into is that the other programs are more, we're commercial, we're not residential. We do bigger project type things.

MAGALI

6:14 Also, Alex, our company has gone to doing a lot of what we call prevailing wage work. Dr. So most of them are public jobs. So there's a lot of work behind the scenes and paperwork. So I need things that have like tags or whatever that alert me to a job that's over 30 and it's not even, our job might be 5,000, but I got to find out if the whole aggregate of the project is over 30 because then there's so many, so much more paperwork or if it's a sub, they got a whole list of things. They got to send me somewhere where there's like tags. And I know skyboss now has tags like that we can use my biggest do the sky glass right now. If it's a, if it's an estimate, it has an invoice number and a work order, and then it gets converted into an invoice. And so with Quickbooks, I never know if an invoice just isn't there or not because it doesn't go in numerical order as a regular normal invoice to be paid or collected on. Does that make sense?

ALEC

7:19 Yeah. That does. I gotta kind of break down each of those things one by one. So the first quick thing, we do have tags. So you can tag jobs, tag invoices, tag quotes, there's a lot of things you can tag. We do have tags to. So projects, are those just multi day? Are you just billing them all at once? What does that practically look like? Is that more complexity, high complexity or kind? Are you doing a lot of Aia billing? Or is it just simple multi day jobs? Like what does that kinda look like?

JOHN

7:50 So when we do a job could be a couple of hours... job could be time days, and in some recent cases, they could be a month. Okay. So basically, you know, I don't we going with this, but if we can do a little bit of everything?

ALEC

8:19 Are you, are you owning, I'm assuming you're owning those projects, you're not working with any GC or anything like that?

JOHN

8:24 Right? For the most part, we are the GC of them, we do sub work for one big customer in the commercial pull industry and we've probably got sub accounts under and we'll work for them or we work for the district. We could work for a customer in to three different people and say property, but I build the district on day.

BOB

8:53 I told them but.

JOHN

8:55 The customer, my customer one day or I might build a contractor for that same customer out in the field. So, we, you know, that property or that location could be invoiced, three different places... that.

MAGALI

9:12 The same, my invoice, just three different jobs could come from three different places for that one property at different times of the year or whatever. Not all at once.

JOHN

9:24 The budget thing, you know, it's easier for us to do it under another person. Sometimes it's easier. We do it direct, you know, it just depends on how things play out. I guess on a case based. Okay, we do a lot on the fly repairs where we enter in a lot of custom verbiage.

MAGALI

9:50 As well as I.

JOHN

9:51 Do a lot of repetitious jobs where we'll go out, overhaul back, watch as a commercial filter system. And it'll be, you know, five out. I'll do you know?

MAGALI

10:03 Set up as a template?

JOHN

10:05 In our current program?

MAGALI

10:06 Holiday I go.

JOHN

10:07 Back the job. I want. This is how many I'm doing, how many balls I put that price? And then I, you know, I can.

MAGALI

10:15 Just it if I need to or you.

JOHN

10:17 And then add, I can add a travel charge.

MAGALI

10:20 All that.

BOB

10:21 Stuff makes.

ROBYN

10:23 Okay.

ALEC

10:24 Okay. That makes sense. And with that, you know, what are you guys doing right now to manage the stuff? Are you even using BuildOps? Are you kind of doing it all manually or like how are you doing it right now?

ROBYN

10:37 You're...

JOHN

10:38 On skyboss still till thirtieth page, doc of September. They're they're done as far as we got to be in house call pro or some place else my at point and.

MAGALI

10:50 In training log with BuildOps?

JOHN

10:52 Yeah. And, and we're gonna probably dump them on their head quickly in the.

MAGALI

11:01 Real quick. Can I see a one month calendar of our jobs?

ALEC

11:06 Yes. So, I saw that in the notes too. So you can, it's an extension right now? We're actually, you know, making a lot of updates to the scheduler, dispatch. We put out a little video on our website where you can kinda see what that would potentially look like in the future, but right now, it's just an extension, I can show you that today. If you want to take a look at, that, seems like they don't have that with BuildOps.

--- Next Steps ---

MAGALI

11:33 Yeah, yeah. I think we can only see a day or a week which is what about, can we put on the calendar like I'm on vacation and then look out three months and see

who's on vacation or whatever? Because I know like when we were skyboss, you can't see it when it's a one month calendar.

ALEC

11:52 Yeah. So, you know, we are, you know, we do have a dispatch. We do have a scheduler. We can do those things. All our over 1,000 accounts use those functions every day, but at the end of the day, we're not like an outlook. You know, we're a work order management software first. You know, we do some light CRM stuff light scheduling. But one way you could do that some of our customers do that is a lot of our customers will create a vacation location and you could dispatch a work order like a dummy work order to that vacation location. And that indicates the office that, hey, Alec is on vacation. So it's kind of like a dummy work order just to indicate that Alec is out. That's one.

MAGALI

12:34 So, if you're trying to schedule it'll, let you know, no, he's not here.

JOHN

12:38 We, we could just use the guy's home address as a customer and do it that way.

ALEC

12:47 Exactly. Yeah, it's a little bit of a workaround. But that's how most of us are, most of our customers are doing that. So, yeah, it works pretty well. Obviously.

JOHN

12:54 I... can, I, is it is...

ALEC

13:02 What do you mean by?

MAGALI

13:04 Put...

JOHN

13:06 In other words, if I booked someone for?

BOB

13:08 Or...

JOHN

13:09 Appointment for 10 o'clock tomorrow? And then all of a sudden, I book them on another one at 10 o'clock will the citizen say no, can do?

ALEC

13:18 Yeah, I'll tell you that he's dispatched to two jobs. You can also, you know, add multiple technicians to a job as well.

JOHN

13:28 Yeah, I stop you from double book.

ALEC

13:34 Right. I mean, I can definitely play around with it. I don't know if I'll explicitly say, hey, you can't dispatch this out because it's at 10 10 am, but it will tell you, hey, this person is on a job at 10 am. I don't know if I'll give you like an alert or something in big fun to let you know, but I can show you what that would look like.

JOHN

13:55 If you want, okay, I mean, these are all problems that we're running into it's just like, you know, if I'm trying to double, but I, at least I should be alerted or warned about that, right?

ALEC

14:08 I mean, when you look at the dispatch board, you'll see what technicians have, what appointments. So, if Alec has a job at 10 am, you want to, you know, dispatch Alec out at 10 am because you would see it right there. Yeah.

MAGALI

14:27 One of our other things is go ahead.

ALEC

14:30 No, you go.

MAGALI

14:31 One of the things too, can you start a job, stop a job, start a job? Because in some of the programs we found, you can't just say Monday, Tuesday, Wednesday and then say we're going to return the following Thursday, Friday or something like that or add a guy because sometimes all four of our guys go to a job for two days and then one is taken off to go to another job. Can that be done in the system or break it up? Like we're here for three days and we have to break away to go to another job. Most won't, let you.

ALEC

15:04 Yes, you can have a multi day job with multiple technicians. And then if, you know, like let's say you're going to go out there Wednesday, Thursday, next Tuesday and then Friday?

--- Next Steps ends ---

JOHN

15:14 Do that. Can't I can't get him the meeting. Can you send him another invite real quick on an e-mail?

ALEC

15:23 Yeah, yeah. Absolutely. Give me one.

MAGALI

15:27 He may have gone to the oldest.

ALEC

15:31 Yeah, that's...

JOHN

15:34 I'm gonna just text them back end, look in your e-mail sending, they are sending the, or sending you an invite?

JOHN

15:49 Thank you very much.

ALEC

15:53 Yeah, no problem. Just one sec. Little this, my other monitor. So I'm not playing video games or anything, just trying to send him.

JOHN

16:00 So... you're...

ALEC

16:06 As far as you guys when you guys go out to do those preventative maintenance jobs, is it common for you guys to identify like repair opportunities? And then the office needs to quote them out. Is that a common workflow for your guys day to day? I know that a lot of folks I talked to especially a lot to do a lot of PMS that's something they're looking to streamline? I was just curious too on kind of how that goes for you guys?

ROBYN

16:28 Yeah, yes.

JOHN

16:29 And, and as far as can we attach, the equipment to the invoice so that we can call up what we've done to that piece of equipment?

ALEC

16:41 Yep. So you can associate each work order with the specific piece of equipment. That way when it gets clicked to an invoice, you know, what piece of equipment it's pertaining to. Is there a reason that stands out to you or something that's important to you? Is that just something you don't have now or something you'd want to?

JOHN

17:00 We don't have that now, but it would be nice that we'd be able, to be able to attach invoices to the equipment. As far as... format, we can upload, what formats can we, or what formats can we upload? Can we do PDF or excel videos? What can we upload to a work order or to?

ALEC

17:28 Like from the guys in the field or the people in the office. Okay? So from the field, they can upload like a picture, video, audio memo, PDF, stuff like that similar stuff in the office as far as like, a robust list of what we can do, what we can't do, I could definitely, you know, send that in like a recap, e-mail... but I mean, the main ones, I mean, is there any odd ones that you have that you're a little concerned? You can't get in there?

JOHN

18:02 Well, we were really limited with kilos. And I mean, with BuildOps say that we can upload a multitude of things like you can, but I think, you know, videos would be really nice to have as well as like the pictures, PDF. Like as far as like the equipment, can I upload a PDF to attach to that piece of equipment, say with the parts breakdown?

ALEC

18:32 Yes. So some of our customers like you can attach PDF to like the location or the customer page, and then you can also attach it to a specific piece of equipment. So, for example, if you needed a like manual or something like that on the piece of equipment, you can put. And if your techs want to have access to that in the field, they can do that as well.

JOHN

18:56 Because we have some equipment that's obsolete in finding, the PDF and sometimes little charleston? So this is good that we can attach like an obsolete if it's a current, you know, current thing, you know, they just hit the website is there. But when it comes obsolete, the becomes a challenge.

ALEC

19:16 Okay. Yeah, gotcha. Gotcha. And you guys deal with like a lot of phone radio to like text calling you guys back in the office, trying to figure stuff out, maybe stuff like that. Is that something you kinda gonna go through right now?

JOHN

19:28 All the...

ALEC

19:30 Yeah.

BOB

19:32 Guy.

ALEC

19:35 Okay. Gotcha.

JOHN

19:38 Good. Well, I made it. Okay, good.

ALEC

19:40 Yeah. Got Bob in here, Bob. How are you doing today?

BOB

19:47 Technologically challenged?

ALEC

19:53 All good man. No, no, no worries. I know Zoom can be fun sometimes but we're here. So no worries.

JOHN

20:01 I jump into it. Let's see what and made. And Bob, you guys aren't gonna let you guys ask the question rather than me?

MAGALI

20:12 Okay. I guess the next would be like how your time keeping system works. I would presume you have something in there or?

ALEC

20:20 You talk about timekeeping? Are you referring to payroll or like, I know that can mean a lot of different things for.

MAGALI

20:28 Yeah. We, we use a company called busy, for them to keep track of their time. Well like a time clock for payroll, you know, clock in clock out, drive time, work time, office time, shop time, and then, we enter the jobs in there with the work order number. So the guys know to select it. And then at the end of the week, I do the payroll based on that because again, this is where that prevailing wage stuff comes into play. They get paid different wages.

ALEC

21:00 Okay. Gotcha. And you saying they're using that right now that's what they're using the clock in clock out?

MAGALI

21:06 Yes.

ALEC

21:08 And I mean, how's that going? Do you like that system?

MAGALI

21:11 But we have to always put the work order, do the description and put it in the system. Where if it works with... your company where you have some sort of time keeping, that they'll see the work order because it's on the dispatch board. And so they'll click on it to clock in to it.

ALEC

21:30 Yeah. So we do, as far as I don't know, we could definitely scope that out as far as if they'll play with that. I think I called it push. Was that what you said, busy. Busy? Okay. Busy busy. Yeah, I don't know if they'll play with busy, but we do have... a module, it's called service time card that's designed basically the technicians at the end of the week or however you want to do it into two weeks, can submit a time card to you. You can review that time card, make sure that time is good. And then from there, depending on if they'll play with busy, or if you'd use something else at that point, you could export that template or if you can't it'll just kinda organize that data so you can put it in from.

MAGALI

22:15 They'll just clock in clock at it doesn't they're not like clocking into a specific job that they'll see through your through what is a service trade?

ALEC

22:26 Yeah. So service trade, we have, you know, three major clock events. They can clock into jobs, clock out of jobs. You also have your parts labor items. So some people use like the labor to track that time. I mean, one thing I will is that, you know, service trade. We've been around for 10 years. So there's a lot of ways that we can help your business. But, you know, typically people see the most value out of service trade out of like the deficiency quoting managing the recurring services, providing the customer with a good experience, stuff like, you know, scheduling and payroll and stuff like that. That's kind of like a bonus. So, depending on where those are and the priorities, I would just keep that in mind as well. But no, that's definitely stuff we can do, so to speak, I would just need to get an idea. I don't know if I haven't heard that busy before. I know we work with like Paychex. I don't know if you've heard of them stuff like that?

MAGALI

23:26 I think I have, yeah.

ROBYN

23:27 Yeah.

MAGALI

23:27 Yeah. The eight.

BOB

23:30 One of the other things is being able to do like a got time card. So that way there, our client knows that it is somehow time stamped when we arrive on a specific job?

JOHN

23:48 St, is that's how they're moving forward to work on our jobs and there with their vendors, is they're going to start doing Geo stamping and accepting that in Lou of the stupid paper forms that we keep having them fill out and Chase everybody around for as soon as they get to the property at Geo stamps on, at that property and starts the time?

ALEC

24:13 Okay. And that's their system, not your system?

JOHN

24:16 Okay. That's what, any of the payroll systems that does Geo stamping, they'll accept that in lieu of the stupid paper thing we've been doing.

BOB

24:26 So, if service trade has, that is a nice feature for us. And then, if at time stamps, then we can basically, we have backup.

ALEC

24:37 Yeah. So I do just want to preface to saying, you know, we're not an adp or Paychex. We're not, you know?

MAGALI

24:44 Yeah, just, I need a timekeeping so I can do all my calculations and then upload it to adp or go in and put it.

ALEC

24:51 Okay. Yeah, cause I...

MAGALI

24:52 Send you a sample of what I get out a busy to see if that would work in service trade because it's we want them to log in to the job so they can put notes or whatever.

ALEC

25:04 Yeah.

MAGALI

25:05 And that we have the time there. But right now, because we don't have anything really concrete or functional enough, I guess would be the term we kept busy.

ALEC

25:17 Gotcha. Okay. Because I...

MAGALI

25:18 Was supposed to do that, but it seemed really clumsy.

ALEC

25:25 Okay. Sorry, sorry, but.

ROBYN

25:26 That.

ALEC

25:27 So, I think what happened if I want is busy would be replaced by time card if you like time card.

JOHN

25:33 And thought it was a.

ALEC

25:35 Good system for that. And I know time card does play with adp, I know that.

MAGALI

25:40 But does it work with your system? Does it like, can they log like, okay, the guys I guess are going to have apps on their phone for service trade to say, hey, I'm at the job or clock into the job, correct?

ALEC

25:52 Correct. So, the ServiceTrade mobile app, they'll have a way to clock into the job, clock out of the job. The time card basically at the end of the week or any end of two weeks or however you wanna do it, they'll review their time and they'll submit what we call a time card to you. You review the time card. If you have any issues with it, you can request them to make changes. If you're ready to approve it. You can approve it. So it's designed, the products specifically, a lot of our customers back in the day used to use like paper time sheets. So it's kinda designed to be that like bridge between. I have all this data of time, but it's not organized. You know, you

know, technicians are, sometimes, you know, you gotta make sure the time is correct. They submit the time you have the time, and then you can either double data, enter it into wherever you need to double a, or enter it or if it plays the.

BOB

26:44 Okay. Now, on the mobile portion, will it Geo stamp? When, when they clock in on the mobile app, will it Geo stamp?

ALEC

26:56 So, it's not gonna be like a live tracker like a fleet management system, but it will take a GPS snapshot. So, for example, if Alec walks in at target, but he's 20 Miles away from target, it'll let you know that, hey, Alec isn't actually at this target, he's 20 Miles away now, as far as like a live scanner, we do have partners we work with, but we're not like.

JOHN

27:20 We aren't we aren't looking for live scan with Geo stamping, just, we just want a snapshot. Let's let's move into your system. So at least we get some screen time with you, okay?

ALEC

27:32 Yeah, that, that's totally fine. So yeah, but in short, we do that and I can show you that as well. So I'll just kinda give you a little bit of background on us since a lot changed last time we spoke to you and then we'll just hop right into it. But anyways, what I kind of had planned for today based on the notes here is I first wanted to go through the mobile app kind of show you how that works, how your text can log into jobs, how they can report repairs. Then after that, we'll I'll show you some things in the office, kind of some of the office functionality you guys are looking for. And then I'll sprinkle in some customer viewing stuff as well. And then if you guys like what you see today, we could talk next steps, pricing if it makes sense.

--- Pricing ---

ALEC

28:15 But anyways, we understand that there's a 40 percent shortage of technicians in the workforce basically, meaning that there's an eight percent loss of tech in the workforce every single year. And what that practically means is that the gap between the amount of work or the demand for work you have and the technicians you have on staff is growing every single year. Now, a lot of people come to service trade to control costs, whether it's streamlining their operations or setting up their technicians for success, we can definitely do that. But what a lot of customers find is that, you know, once they sign with service trade, once they move forward, they can also grow their quality revenue. I basically, meaning, you know, selling more service agreements, getting more people on a plan maintenance agreement as well as, you know, picking the work that you wanna do, what works most popular or most profitable for you? And what customers are, you know, the highest margin customers. Now, as far as the, you know, places in the business we can affect, we understand that software is a recurring expense, but we also wanna make sure our customers are getting ROI or above average customers are receiving 37 percent

growth year over year. Our average customers are seeing 19 percent. So as far as, you know, the major areas of the business, I'm gonna kinda briefly go through all these. So for example, office coordination, we can help you manager PMS know what PMS are due for the technicians, we make it convenient for them to report more repairs, get more pipeline back to the office. We'll give them the ability to see service history. The goal of the tech app is to limit internal calls as well as, you know, increase their productivity... for customer communication. There's all kinds of ways we can do that main way of sending them a post job report. Because oftentimes the person you're billing isn't the person that you guys work with on site. So we'll make sure that they're you know, the know of what you guys did. And then I'm not gonna touch on these as much, but there's a lot of robust reports we can run in service trade. And quoting is one of the big ways a lot of our customers see a lot of value in service trade. But like I said, you know, we've been in the industry for over 10 years now. We have a 95 percent customer retention rate, meaning that if 10 companies sign up with service trade nine stick with this long term and we only work with commercial service contractors. I know you guys kinda mentioned in the beginning that there's a lot of residential softwares that don't quite work for you. It's definitely a different workflow. So, all of our product development budget definitely goes towards... you know, commercial service workflows compared to like residential or ERP, stuff like that. But before we hop into it here, do you guys have any questions based on what I just said or?

MAGALI

30:59 One thing I do realize unless you did, I have to step out and grab something that like integration with Quickbooks desktop. Yeah, I don't know if you mentioned that or not or how that works.

ALEC

31:12 Yeah. So we... yeah, sorry, there's a little bit of delay on my end. My bad.

MAGALI

31:18 Okay.

ALEC

31:20 So, yes, we do have an integration with Quickbooks or you on?

ROBYN

31:23 Online?

ALEC

31:24 Desktop?

MAGALI

31:25 Desktop desktop?

JOHN

31:27 Okay.

ALEC

31:28 Okay. So we do have integration with them. I'd say about, you know, 50 percent of our customers are on Quickbooks whether it's desktop or online, and a good amount of those are integrating it. We do have about 30 percent, 40 percent of our customers that don't integrate with their accounting system for whatever reason. But essentially, the way it works is people look at service trade. They're like I want to handle all my front end. So we'll handle all the stuff from the minute you dispatch something to the moment you invoice it.

--- Pricing ends ---

ALEC

31:55 What most people are concerned about is getting all that information in a outstanding. So we'll basically you can either set it up as a sync or you can manually push it to Quickbooks. I'm definitely not the Quickbooks expert over here. So if you guys like what you see today and may maybe want to speak to an accountant or someone that knows the Quickbooks integration a little bit deeper than I do, we can definitely set that up. We have a lady on staff. She works with our active customers as well as, you know, people that are thinking about moving forward with service trade. So she could, you know, kinda walkthrough how the data is mapped, whatnot, and I could also send you some videos as well. But in short, we do have an integration.

MAGALI

32:33 Okay.

ALEC

32:36 Cool. So I'll go ahead and get out of this here. So if you just give me one sec... so basically there's three major views of service trade. We have the office view, the technician view and the customer view. I, I'm gonna walkthrough all three today. But today, I wanted to start off in the office view looking at a work order. So this is what a work order looks like in the office view, couple of key things that stand out. I'm gonna point out the main things. But if there's anything else that catches your eye, feel free to interrupt me. The one thing is these assets. So since we are a commercial service platform, we can help you guys track your pieces of equipment you guys work at a location. So for example, this is what a boiler looks like in service trades. This is an example, you can put as much or as little information as this boiler as you want. So you can put the serial number model, manufacturer, you can put the type, you know, fuel type stuff like that.

MAGALI

33:49 Invoice, if you click on says we're working on this one, will it do something like that in the invoice mark that serial number, this or that or not that I care? I just, it might be handy if it does that versus retyping it each time or whatever. Do you know of anything?

ALEC

34:05 Yeah. So.

MAGALI

34:07 Yes.

ALEC

34:08 No, you're good. No, it definitely makes sense. So, I'll definitely show you an invoice today, so you can see what that looks...

ROBYN

34:13 Like.

ALEC

34:15 But just out of curiosity, are you trying when you say that, are you just trying to keep the customer in the know of like what you guys worked? Is that more for you guys internally or more for the customer?

JOHN

34:27 When you, I guess as much information as we can give them, okay?

ALEC

34:36 You guys ever thought about getting like a customer portal or something like that? Maybe something where they can log in and see the equipment you guys work on, see the quotes and voices pertaining to that? Is that something that you guys have ever considered?

JOHN

34:50 I'm not considering that at the moment. Okay. Yeah, by.

ALEC

34:56 That's fine. I was just saying that is one way to accomplish that as well. But in short, on the invoice, we attach this little service link on that service link, it's a post job report. I'll basically give you guys a, or your customer. I should say a complete history of what went on that equipment. So they can see that and they can see what the equipment's called stuff like that as far as every single, you know, little piece of information. I don't know if I'll put it there. I can definitely double check on that, but it does attach the piece of equipment so they know which one is associate.

JOHN

35:33 That's that's fine for now that works correctly?

ALEC

35:37 Okay. Gotcha. And do your guys texts have access to like service history in the field by chance?

JOHN

35:46 Our current program doesn't do that?

BOB

35:48 It... does it does do that? It's it's, and in a lot of cases, it is kinda nice to be able to review history. It just gives you a snapshot you know, invoice number, the snapshot worked on pump such, and such. And then it shows recommendations and actions. And if there's no dollar amount on the invoice, it was just never, you know, the client didn't accept or whatever.

ALEC

36:18 Okay. Yeah, I got you. So it's kind of a similar thing in here. You can see any services whether they're recurring or break fix, any work orders, associate with this piece of equipment, any deficiencies, status of those deficiencies, any quotes. And then that manual thing I was talking to you about a little bit earlier, John, if you wanted to add a manual or something like that, this is where you could add that manual stuff like that. So you could, you know, add some files.

JOHN

36:45 Right.

ALEC

36:48 Cool. But as far as the work order, that was, the main thing I wanted to show you there. Unless you guys have any more questions, what I can do is I can go out to the field and kinda show you how your technicians would work on this job. Does that sound like a plan to you guys?

BOB

37:03 Sure.

MAGALI

37:03 Yes.

ALEC

37:04 Okay. Sweet. So just give me one sec. I'll go ahead and share my screen here. So while this is pulling up just so you know, the service trade mobile app, it can be used on iPhone or android. It can also be used on a smartphone or a tablet. So basically, what you're looking at here is what a work order looks like in service trade. Now, you can filter this by today. There's all kinds of ways you can filter the order, these things. But I'm just doing it by today just to keep things simple today. So as far as what this work order looks like down here at the bottom, this is where your technicians can log clock events. And this is also where the GPS snapshot will be initiated. So we have three types. It's completely up to you if you wanna use all three or non, but we have a job prep here. We have in route, you could even send your customer and in route notification if you wanted or you have on site. And if I clock in on site, what that will do is they'll take that GPS snapshot. So that's gonna tell you guys. Hey, Alec is 323 Miles away.

MAGALI

38:24 That's what we need.

ALEC

38:26 Okay.

MAGALI

38:27 Got you.

JOHN

38:28 Yeah.

MAGALI

38:29 For, because we have somebody a customer that said, hey, if you can show us have some sort of clocking or map thing that shows that your guys were on this job at this time and they left this time, we don't have to do handwritten time sheets because sometimes they forget to take pictures of it. And then if we don't have it, we may not get paid. So this is perfect.

ALEC

38:53 Got you. And I'll definitely show you how, that visibility is kind of in the office too. So you can see how that looks once it.

MAGALI

38:59 So, can we do travel time? Like because our guys get paid from the minute they get in the truck and turn the engine on because they take their trucks home?

ALEC

39:08 Yeah. So we call that in route. So if I wanna do in route, you can do that as a clock event. Now, keep in mind, we have these job items too. So the job items are what you're billing the customer. So that could be if you do a trip charge or you do parts labor, you know, the time on the job that's really more for the billing. The clock events are usually typically used more for internal, whether it's for time card or something else. But the job items is actually what its Bill to the.

MAGALI

39:39 Okay. Well, sometimes we do charge travel time to them. So we would wanna know.

ALEC

39:46 Yeah. So the idea is that they clock in and out and you would wanna make sure that the end route time and the time you're charging the customer are similar if not the same. Some people round, some people don't so that's kind of what that would look like.

--- Call Setup ---

JOHN

39:59 Hey, Magali.

MAGALI

40:00 How are...

JOHN

40:01 You, you in the background?

MAGALI

40:04 What?

JOHN

40:05 Sounds like you guys are echoing the background somebody?

MAGALI

40:10 No, I mean, I haven't changed anything.

BOB

40:13 No, I have.

MAGALI

40:14 The dog right now?

BOB

40:15 It's, it's me. Let me go to my truck because there was a loud speaker, on the full deck.

JOHN

40:22 Thank you.

MAGALI

40:24 Now, it's the dog barking. I can close the door actually.

ROBYN

40:28 We can't hear him mad.

ALEC

40:31 I can't really hear anything, but, yeah.

ROBYN

40:33 Hear the dog?

MAGALI

40:35 So...

JOHN

40:36 I clocking event... is for, that doesn't stop me from say building a job until she reconciles the time on the job.

--- Call Setup ends ---

ALEC

40:49 Exactly. So, essentially, the clock events are used more for internal. Basically once I clock out, the technician will say the service as complete and say the appointments complete. And then I'll ping the office basically letting them know, hey, the technician completed this work order is just gonna go back to the office to review before passing on to billing. And the idea is that there's some checks and balances there so that you're not, you know, doing any inaccurate billing.

JOHN

41:14 In anything? Okay, good. Because that was gonna be a problem too because, you know, the other program is gonna start holding up, you know, the horse and the cart and getting them all slapped around. So we couldn't do things until somebody else did something else. And it just was gonna be a giant hassle.

ALEC

41:35 No, yes, no, these, like I said, some of our customers don't even use these clock events for whatever reason. So it's just up to you on if you want to, you know, but that's not gonna stop you from taking a look at the job or getting visibility on stuff like that.

JOHN

41:50 Okay. Keep going.

ALEC

41:52 Okay. So as far as this at, like I said, 90 percent of the time they're mainly going to interact with these eight major tiles of information. I'm gonna cruise through the main ones. But let me know if you have any questions. So first one they might take a look at is the services. So what they're here to do is they can see what piece of equipment they're here to do and what they're here to accomplish. Now, as far as that estimated price, estimated duration service straits very permission based. So, if you don't want them to see that they don't have to see that obviously.

JOHN

42:24 We...

MAGALI

42:25 Do like the estimated time?

JOHN

42:27 We, we don't care. We, we're a small company we, you know.

MAGALI

42:32 We're starting to grow John. I mean, that can always be turned off too, right? Turned on and off at any given time.

ALEC

42:39 Right. Yeah, exactly. And that's kind of what you're saying when you're smaller typically text, get more visibility as you scale. It's probably gonna, you know, cut back on the visibility a little bit more. But yeah, absolutely, you know, they can do all that, you know, kinda see that the reason some people like estimated time is, you know, for PMS and stuff like that. It makes it a little easier for you to plan out your work now. If, you know, a job typically takes three hours or something like that can be good for planning stuff like that.

MAGALI

43:11 Well, for me, I need it on these prevailing wage jobs when I have to send.

JOHN

43:15 And forms for apprentices.

MAGALI

43:16 And stuff like that. I need to have an estimate of what, how long the job is gonna be.

ALEC

43:23 Okay. Gotcha. Cool. As far as these comments. So like I said, these can be site specific comments. The text can leave comments. These are designed to limit communication from the home office and the technicians. So they have visibility on maybe they need a gate code or maybe they need to bring a ladder. This is just designed for less phone calls back to the office. They can also see that asset. So similar to how I showed you in the office, they can see the asset we're working on today. Cool thing is they can also see all the assets at this piece of, at this location. So if they have any other assets, the customer might have a question about, they have access to that information. But essentially, they can see, you know, any service history. So any work orders that ever been logged in this piece of equipment, they can see any deficiencies, any repair opportunities you've ever reported. They can see those files and photos. If you had a PDF or something like that of a manual, they could pull that up here. And then they can have a, you know, a brief list of the

information we have in the office. So they can see, you know, warranty date, install, date, all that stuff.

JOHN

44:39 Okay.

ALEC

44:43 And then the, unless you guys have any other questions, the last thing I wanted to show you is basically how the technician could report a deficiency. So this is one of the ways that a lot of our customers see a lot of a root. The goal of this is for them to report more deficiencies as well as get higher quality information in the office. So I'll show you this real quick. So if they click this deficiency tile here and they click add deficiency, this is where they can go in and put a brief description of what they found. So for example, if it was a leak or something like that, they can put that here. We know technicians don't like to do a whole bunch of writing or typing. So if they'd rather leave an audio memo, we give them the option to leave an audio memo, take a video, stuff like that. But, you know, I know you kind of mentioned it to Emily, but, you know, a lot of our customers too, like to take a lot of pictures. Main reason being is that, you know, if you add I'm sure as you understand, you know, two to three pictures to a quote to a chance of it getting approved are a lot higher. So you can add a picture here. And the idea is that it's gonna tell the story. They're not just gonna see the price, they're actually gonna see what's going.

JOHN

45:53 Good question. As far as the attachments... can I select what I want to send the customer and what I don't want to send the customer?

ALEC

46:07 Yep, absolutely. So for, you know, you can have the text do that and you can do that as well. So if the text leave an audio memo and they wanna market as internal, they can do that. And then when you go to send it to the customer, you get to toggle on and off what you want them to see. That way they're not hearing any of your audio memos or videos that maybe you don't want them to.

JOHN

46:26 Okay, great.

ALEC

46:29 Then they can also select the severity. So I'm gonna say this is an inoperable unit. It's not functioning. They can set the specific asset. So I'm gonna tie it to that boiler that I'm working on today. So I'm building out that history. And then last, but not least I'll select the status. So I'm gonna say this is a new deficiency, a new opportunity that I need to get quoted out. Now, if I save this here, what they'll basically do is whoever in the office that's responsible for quoting this out, they'll receive an e-mail notification, that e-mail notification and we'll just say, hey, ServiceTrade founded efficiency, go find it. It'll contain the exact details that you guys need. So you guys can go.

JOHN

47:12 Had quoted out. Is there going to be a report that I'll show all the deficiencies setting out for all the customers?

ALEC

47:20 Exactly. So you can either run a quote report for all the quotes you have out or all the deficiencies that you maybe have not been able to get to? You can do all that? Is that something you do now or something that would save you a lot of time or curious on why that kinda came up?

JOHN

47:35 Yeah, save me a lot of time. It would save me a lot of time because then it would be dumped into a certain area and I can just pick through it and just, you know, start doing, you know, doing the quotes. Now as far as the deficiency does that tie to the quote? So if I get the quote, that deficiency will toggle away.

ALEC

47:59 Yeah. So basically how it works is that when you get a deficiency, I'll ping you via e-mail I'll also show up on the work order, and then you just simply have to flip it to a quote and the quote will be associated with the deficiency. So, you know, what quotes are associated with what as well as the quote will be associated with the piece of equipment. So I can see that, hey, this boiler has this quote out. And here's the status of it kinda like I showed you in the office, I.

JOHN

48:26 The deficiency would hang out there until they accepted the quote for that deficiency.

ALEC

48:31 So, the way it works is once the deficiency is flipped to a quote, the way you're gonna track the status, you're gonna look at it more like a quote. You're gonna track the status of the quote is the quote been approved? Has it been viewed there's various ways you can stack this track, the status of the quote. Really, the deficiency is just more of like pinging you to let you know, hey, your customers equipment is inoperable or something like that. We need to flip this to a quote that's kinda the purpose of the deficiency.

JOHN

48:58 Okay. Fair enough. One, one quick question. Well, we'll get through the invoice, keep on, I'm getting ahead of myself.

ALEC

49:08 No, you're good. You're good. We'll definitely go through that. And then as far as on this, I mean, do you think this would help you? I don't know if you have issues managing those quotes right now or maybe your...

JOHN

49:21 Belonged every day with quotes. So, yeah, no, this will help me tremendous.

ALEC

49:29 Gotcha. And are you trying to free up time to like, you know, make, you know, make sales stuff like that or what would you kinda do at that time if you had?

JOHN

49:36 If I, if I can, if I can get through my quotes faster, that means I can turn more work out and that would be like Magali says we're growing. I just don't want it to be a hockey stick growth.

ALEC

49:53 Right, grove, you can handle. No, and I get it.

JOHN

49:57 Being busy being too busy is as bad as being too slow. Both have both have problems.

ALEC

50:05 Right. Yeah, you don't you definitely don't wanna, you know, get ahead of yourself. That's for sure. So, yeah, no, I definitely get that.

JOHN

50:13 No. Everything I see so far... looks good on face value.

ALEC

50:21 Okay. No, I got that.

MAGALI

50:23 Like real quick, the job like the job or job numbers assigned. And then once it's like done, then it's given an invoice number, correct?

ALEC

50:34 Correct. Yep. So the job numbers are automated sequential number, and then the invoice number.

BOB

50:39 And...

MAGALI

50:40 With that, will the job number appear on the invoice? Or at least when I'm online, I can see what tie one to the other?

ALEC

50:49 Yeah, that'll be a little bit easier to show you and tell you. But I believe that, the invoice they'll be a little hyperlink with the job number. So if you need to click that job number to refer back to that work quarter, you can.

JOHN

51:02 Do that.

MAGALI

51:03 Okay. Because service autopilot, I remember back then did not have, that was so frustrating not to know to look at all the detail and stuff like that. Okay?

ALEC

51:15 Yeah. When we're definitely, I'd call it a hyperlink friendly software. A lot of the fields you're looking to get to, you can click instead of having to, you know, dig around. So I can definitely show you that. Cool. Well, I'll go ahead and clock out of this job here. And then if we stop sharing my screen here, I'll kinda just show you how this information travels. So as far as the work order, basically, what you'll see here is that the appointment was completed... we can see these clock events. So, you know, you guys kinda mentioned it has a little explanation mark basically indicating you that I wasn't actually there. So you can see all that here right there. And then we have our deficiencies as well. So, these are deficiencies that we reported for the work order as far as how it looks via e-mail. It's gonna look something like this, basically indicating to you guys who reported it at what location, brief description, what equipment is it pertaining to? Once they click this link, it's gonna take them to something like this. Basically, this is just giving you guys high level visibility on the description. The tech could even add a proposed solution if you wanted here are the pictures. So if you had any audio memos, videos, stuff like that, you could kind of briefly look over those. But as far as flipping this to a quote, I'll just simply click add to quote and I'll click create quote.

ALEC

53:01 Now, if this was a relatively unique quote, you can always manually go in and add a description, any parts, labor items. What a lot of our customers like to do though is apply these quote templates. So, for example, here, I have a boiler template in the system. The idea is for those five to 10 common repairs, you kinda just have some templates ready on deck. Really, the goal of this is to get you about 90 percent of the way there. All you might need to do is make some slight adjustments to the verbiage or maybe the margin isn't quite high enough, and we want to adjust that to get closer to 35 percent. And you're also in control over what format do you want? TAM? Do you want grand total, all that good stuff... before I send this out to you? Just curious, I mean, do you guys use templates right now or how does this kinda compare to the way you're quoting now? As far as the tech reporting repair, flipping into a quote or is...

JOHN

54:01 Looking much more friendly to me also on each templates, can I go in there, edit the template while I'm on the fly in that template?

ALEC

54:10 So, the idea is if you wanted to reset it at the template level, you could go to the template and reset it. But when you apply the template, like let's say with this template, I need to add another bullet point, I could add another bullet point here if I needed to.

JOHN

54:24 Perfect. Yeah, there's a lot of times what I'll do, if I had to do something, you know, restructure something, I'll end up copying it out into word documents, run around, shove it back in there. I'll you know, copy and paste it right back in.

ALEC

54:42 Yep. And the idea is that we'd want you to live a little less in word and a little more in here. So you're not having to do a bunch of copy and paste action. It's a little.

JOHN

54:52 Yeah. As far as like we have a lot of where, we get behind on our billing, and the job's done. Can we run a report on all the open work orders that are out there? So we can go back and make sure we build everything.

ALEC

55:08 Yeah. So there's invoicing reports, work, quarter, reports, you?

JOHN

55:13 Run a?

ALEC

55:14 Report on what jobs need to be invoice. A lot of people. And I'll probably show you guys this in a sec before I show you an invoice. Because we have this service dashboard. It basically gives you a high level overview of the different stages of your work flow. The idea with that is you don't have to run a bunch of reports if you don't want to, but I'll tell you how many jobs you need to invoice, how many jobs you need to close out. I can kinda show you that too in.

JOHN

55:37 If you want.

ALEC

55:38 And I can show you some reports... but I'll send this quote out to you guys just so you can have an idea of, what the quote looks like.

JOHN

55:52 Okay. So you can toggle on and off who you want to send that quote to.

ALEC

55:56 Exactly. So this is just my service trade water bottle. If I don't want you to see that. I just click this. If I had some audio memos, yep, you're in complete control, you can toggle on and off comments. If you want them to see comments, you're in control over what you want the customer to see. But I could go ahead and send this to you guys. If you just give me one sec. Do you want me to just I could send it to one person or I could just show you a preview, whatever you guys prefer. Okay. That's fine. The only thing is, if I show it to you, it will show you how it's approved, but I can basically walkthrough that.

JOHN

56:32 You send it to me?

ALEC

56:36 Okay. Gotcha. So give me one sec, John. I'm gonna go ahead and send this over to you. So I just sent that over to you John. It should be a quote from a var service. It's our little fake company. It would obviously be your logo and stuff like that. I'll show the rest of you guys on this, what it looks like. So this is basically what a service trade quote looks like. We understand the person you're billing quoting isn't always the person you know, paying approving. So we've kinda designed it in that way, this would be your logo. But essentially, they get a high level description of the work. They can see what equipment this is pertaining to. So they see that here, it's kind of up to you guys on how much detail you want in here. Big thing is pictures. They can, you know, go in here and click on these pictures, your terms and conditions. And intentionally, we put either an approved button, they can approve it, put it in a purchase order number if they have one agree to your terms or they can request changes. If the price is too high, something along those lines, they can do that too. And the idea you go ahead John.

JOHN

57:48 To request changes, does it make a volume one two three four and keep each revision?

ALEC

57:57 Yeah. So basically where it goes, John, is there's this little comment section on this quote. I'll just let you know when that customer requested changes time sensitive and it'll just let you know when they did it. So... the idea with that is that basically, you know, if they have an issue with the price, you can revise it real quick, send it back out. And the idea with these buttons just in general is that instead of them having to e-mail you back physically or, you know, give you a call, they can just kinda do it. It's kinda like Amazon, make it easy for them and they can go about their day and you guys can go about, you know, changing the work order from, you know, dispatching it out from there. So that's kind of how that goes. But John just let me know when you approve that in a second. I can kinda show you how that comes back.

JOHN

58:49 Approved.

ALEC

58:50 Okay. Cool. So if I go ahead and refresh this here... what you'll see is the quote was approved, we can create a work order from this quote or add it to an existing job. Cool thing is as well as we can see all the visibility. So I can see when John viewed the quote when it was approved and then kinda to touch on John's point like if we wanted to see a report of quotes that we have out, we can do that as well. So this is probably be more for you, John, but essentially, like let's say, for example, I wanna see all the quotes I had out in June just as an example, there's a lot of as I can put on this. I'm not gonna bore you with those, but I could see any submitted and not viewed basically meeting the customer, didn't even look at it. I could see any submitted and viewed basically meeting the customer looked at it. They just didn't click on anything. And the idea is you can go through these briefly, give these people a call, let them know what's kind of going on with their quote or, you know, if they have any questions or to what a lot of our customers like to do is they like to send that quote out in bulk back to the customer because sometimes just getting it in front of their face two to three times will make it a little easier for them to approve it. And as well as it takes you a little less time than calling them up individually. So those are kind of some options.

JOHN

1:00:05 Out there. Yeah.

ALEC

1:00:10 Cool. Could, you, could you see this helping you guys out though? Do you, do you like the quoting, what's kind of your thoughts on that?

BOB

1:00:16 I like it so far.

JOHN

1:00:19 I've got a lot less, you know, questions that I have before with the other people. Okay?

BOB

1:00:30 I'm sorry... this one quote, you know, if we've got say four different deficiencies, you said it can be added to one job and one quote. And then also they can kinda Ala carte the deficiencies if they want numbers one, four and seven, then, they can approve those?

ALEC

1:00:53 Yeah. So the most optimal way would be to send out one quote per deficiency. I mean, how often do you guys, I guess send out a quote with like four different deficiencies on it?

JOHN

1:01:07 Well, I think a deficiency could be, you know, it's got four different problem but we consider that one.

BOB

1:01:15 Finishing. Okay. Got it. Okay.

ALEC

1:01:20 Okay. So the last thing I wanna show you is an invoice and that's been pretty popular. So I just wanna make sure I'm showing you guys that what that looks like. So basically this job has been marked complete by my technician. I might review it, make sure everything looks good. Once I do, I can click complete job and complete job and create invoice. From here. I can double check, make sure my costs are correct, assuming they are. I'll go ahead and flip this to invoice. Now, if we need to make any adjustments, the prices for whatever reason, we can always do that. So I'll go in here and update some of these prices. And then similar to the quote, you're in complete control over what you want the formatting to be. So I'll just make this grand total only. But you have options... as far as some of the things you mentioned earlier. So that job that's right here, you'll see that little job there. And if you need to go back and refer to that job for whatever reason, you just click that little link and it'll take you right back to that job.

JOHN

1:02:38 Okay.

ALEC

1:02:38 And then I'll show you what the invoice looks like as well. So if I go ahead here and update this so similar to the quote, the invoice was designed to, you know, we know the person you're billing isn't always the person you work with on site. So that's kind of how it was designed as far as some of the questions you had earlier, the equipment is right there. So they can see what piece of equipment that is similar to the quote in control over what verbiage you want here. If they, you know, need a little more visibility before paying, we attach this service link. This is actually something you can send separately as well. So essentially this service link, basically, it's like a post job report, but you can send it before the job, after the job, during the job. This is where they can see, you know, what they came here to do. So, you know, you guys came here to do the boiler, they can see services permission based as well. So if you don't want them to see parts, labor items, or some of these comments, you're in control of that, you got to sign off or a work acknowledgement, you could put that on there as well. And then they can also see this time line. So they can see, you know, when the technician came, you know, all this kinds of stuff. They can see that kind of visibility there. And the idea is that once they see all that, you know, you give them that level of transparency, they should have no issue use paying it right there and they can pay it right then and there with credit card or a CH, as well as far as once they pay it, you know, how it gets to Quickbooks. Like I said, most of our customers are setting it up as a sync. So every 10 minutes hour day, however you want to set it up, I'll take all these, you know, invoices and push them over to Quickbooks. And I'll send you a little bit more information as far as how the data is mapped, where it kinda goes from there. And you also do have the option to manually push it if you'd prefer to do that for whatever reason, but that's kind of how the invoicing looks. Any, any questions on that? I know that was a big thing for you guys?

JOHN

1:04:43 Big thing is service reports. Like on our boilers, we have service reports that we, they fill out. Can I make service report templates that they fill out on the work order and it's attached to the invoice?

ALEC

1:04:59 Yeah. So as far as those templates, is that like kinda similar to like a PM checklist or like inspection form or is that just like...

JOHN

1:05:08 Or, or order now? It's more of a PM checklist that we, it's inside of it. I can, if you want to flip a screen, I can probably show it to you. Yeah, yeah. Feel free.

ALEC

1:05:23 If it is what I think it is, I definitely want to take a look first. I'm pretty sure we can do...

JOHN

1:05:27 That, but I wanna take a look.

ROBYN

1:05:28 First.

ALEC

1:05:28 Just to be...

ROBYN

1:05:29 Sure.

BOB

1:05:31 Yeah, globally, we have within every single invoice, we've got the option of a bunch of different forms. And if it's for a pump or a motor or something, we can toggle on that. And then there's 12 fields that we can fill out. And then we, and then we can add, it automatically gets added to it to the invoice.

ALEC

1:05:55 Gotcha.

BOB

1:05:56 So...

JOHN

1:05:57 Okay. So let me see if, I got a I do list. I get some back up there. Okay. Hoops, we go. Okay. There you are. Okay. And let me see how do I, okay, share screen bingo ago. Got it. Okay. Then we go to mine. I go to here and go to here and view the, okay, here we are here's. The service report. This first part, I made that I call in to quote it. Okay? I'm able to change the number if I want to or use, the embedded number I made with the template and then service kit, which is that. And then we had a flow switch. It had happened after the fact or actually it was part just include in the flow which I'm sorry. And then no, actually it was probably added after, anyways. But then we go to my report there's, report that the guy filled out on the job and it's you know, it's got green arrow, you know, green or yellow or red which is this, is that important? But this right here, the values were really important. Okay? And then we have a place for comments and recommendation. Okay? And then this would be a deficiency in your and that's a recommendation that on the report that continues here for the second boiler. And then here's some pictures of what we found when we're on the on site. So.

ALEC

1:07:59 You, good. Sorry. So the first part of that report, you won't really need that that'll be all accomplished in service trade as far as if you wanted to break down each line item individually, if you wanted to, you know, put some of that information to service link. You could do that. As far as that evaluation form. Are they filling that out like as a fill able PDF? Now, is that like paper, how, how's that kind of getting filled out?

JOHN

1:08:25 Is part of service on a pilot, or, yes, our sky box is part of, our program that we use and it, it's they call in the inspection form within the work order. Okay?

BOB

1:08:40 So, the left column is a template, and then the middle and the far right are fillable fields.

JOHN

1:08:47 And then they gave it a gray.

ALEC

1:08:53 And then what is the green? Is the green? Yellow, red? Is that just represent like statuses of each individual thing?

JOHN

1:09:00 A bad basically. Okay. Yeah.

ALEC

1:09:06 Yes, I'm there's a little bit of delay on my end. I'm sorry, I...

JOHN

1:09:09 Trying to interrupt you. What were you saying? Nothing? I'm just entering.

ALEC

1:09:13 Question. Okay. So, yeah. So the beginning of that report, you can get, you know, most of that accomplished in service trade as far as this service report. If you, if you stopped sharing my screen, I can kinda show you how you could get that accomplished in our system as well. Kind of some of the things you told about templates. So if you just give me a sec when you stop, yep, I'll kinda go through a little each thing on.

JOHN

1:09:38 By one.

ALEC

1:09:42 It's not letting me share my screen now that's interesting.

JOHN

1:09:49 I stop sharing mine. I see.

ALEC

1:09:52 Yeah. I think it's just, no worries. Just an error kinda similar to Bob. I guess I'm just getting the bad in stick now. So I'm gonna just stop, let's see if I work there. We go. Yep. Okay. I figured it out there. We go. Okay, as far as templates. So I'll kinda go through real quick... so service trade, you know, we organize our customers on a Bill to ship to relationships. So if I'm billing target headquarters, but I'm servicing these five physical locations, each physical location will have its own page... as far as you know, what this page can do. I don't wanna touch on this too much, but there's a lot of things this page can do. The main thing I want to highlight is the templates you kind of mentioned. So we have this concept and service trade called services. So services, these can be, you know, your break fix calls or these can be your recurring calls. So basically with each PM, you can associate each PM with a specific piece of equipment. You can put a brief description of what you guys would do. You can put a scheduling frequency as well as the parts labor items that you guys will typically use. And the idea is that you set that up once and you forget it. So service tree will put on a rolling clock. So between the dashboard and other reports, you can run, you're in complete control of never missing out on an opportunity. To what I really want to highlight though about this is you can create templates. So if you have a boiler template, you know, things they're supposed to do or whatnot you can see here. I don't wanna mess up my little page here, but I have multiple templates. It's gonna populate a description, populate a parts labor items if I wanted to estimated price, estimated duration, stuff like that. It'll populate that. That way the customer can see that too. When you go to.

JOHN

1:11:56 Okay. So when you go back to where you highlighted what you... and you go ahead, you add one, it says a boiler and what happens if, you highlight that?

ALEC

1:12:14 Yeah. So if I click on this, it's just gonna populate whatever template I want. So a template would be like this one where a description, you see us here, it's already. I accidentally clicked it, but essentially, you can see here, the description automatically populates scheduling frequency, populates the parts, labor items populates as well. They'll associate it with the right unit. This is not a template that I created per SE, but that's kind of what that does. So if I go back to this one, they'll just do quarterly PM, stuff like that. And the idea is that you set that up once and you forget it. And then when you're setting up multiple locations, when you're sending these things to the customer, they can see that kind of list. It was kinda similar to what you just showed me. Like the list of what?

JOHN

1:13:04 You, if I wanna put in where I let the gas settings, the air settings at, is there a place for me to put that?

ALEC

1:13:13 Sorry, I didn't quite hear you what you say.

JOHN

1:13:15 I wanna put the values of where I set that boiler at it like one point two on the air, you know, one point two on the gas. Is there a place for me to put that value?

ALEC

1:13:27 So, so for that, like that evaluation report?

JOHN

1:13:30 Right.

ALEC

1:13:31 Okay. So for that, your technician would fill out a fill able PDF and that'll get attached to the invoice that person could see that, what do you say?

JOHN

1:13:44 Where would the PDF be resigned in the system?

ALEC

1:13:47 Yep. So I'll show you that in a sec. So if I go here to the back to the mobile app.

ALEC

1:13:58 So essentially those billable PDF, if they need to access those, what they do is they'll click this view, more details button. And then at the top right here, once it populates there's so I think it's because I close this one out, let me reopen this so I can do this one sec... since I clocked out of it. But essentially, you have two options to get your forms into service trade. So if you guys already have them as billable PDF, you can add as many of those fill able PDFS in the system as you'd like it seems like

to me, you just have that one evaluation form that you use that a lot of different locations. Is that correct? Or is that just an example?

JOHN

1:14:47 I have one for FD drives. I have one for boilers. I have one for repair. We have a few of them.

ALEC

1:14:55 Okay. It's like seems like three to six, something like that.

BOB

1:14:59 Yeah.

JOHN

1:15:00 Many, okay.

ALEC

1:15:03 So as far as how that gets populated... so that should come back now. So essentially, if I click this view more details button. And then at the top right here, there will be a little actions button. It'll be click to download blank paperwork. Now, these are your forms. So we don't force use any kind of forms. Like I said, if you already have available PDF, you can upload as many in the system as you want for no charge. If you want us to take your forms and convert them to fill able PDFS. It's about 149 per page. Now, keep in mind what we classify as a page if you have a two page form and it's that one standard boiler form using it at 30 different locations, we'd count that as like two pages. And if I go ahead and generate this here, this is just an example. I know it doesn't really pertain to your industry, but it'll you'll pull up this refrigerant tracking form which would be your form with your fill able fields.

ALEC

1:16:12 As far as how it populates. So we apply these things called smart rules. So with these smart rules, it's basically good to automatically update the work order number, date of service system name. The idea is that, you know, it's kind of up to you on how you want to set this up. They can go in and check any boxes, fill out anything they want, things like deficiencies, they report that in service trade stuff like that. This is really more for those analytics, those numbers, those, you know, kinds of statuses you kind of mentioned. And then once they fill this out, if you want them to be able to, you know, the customer to see these forms, you would just upload that back to service trade. And then they could see that on the service link. So.

JOHN

1:16:58 Speak. And then the up or right? Basically, it's we put your fields that correspond with the day, the work or number. In other words, you have those fields that we drop in the template field location basically.

ALEC

1:17:17 Exactly. The, the idea is that we want the technicians to fill out is least information.

JOHN

1:17:23 Not, the upper right or a bunch of macros within your system so that, it dumps that into the upper right corner.

ALEC

1:17:32 Exactly. And then this is just one, you know, example of a form. But this is one way you can apply these smart rules. Yeah.

JOHN

1:17:39 Okay. So, so basically, we could take, any form we want, make a PDF and they'll go into a library that is per SE in service trade that we can select or.

ALEC

1:17:54 Exactly. In that library too, there's different ways you can set it up. If you want them to have access to any form in your system. You can, you can also make it like, hey, at this location, we just do this. So we're not gonna give them too many forms. And the idea, like I said, as long as they're fillable PDF, as long as they're fillable, you can upload as many of these to our system as you want, and they can go in and, you know, fill the.

JOHN

1:18:16 What? So when we upload that form, it's basically gonna have links, or areas that don't do anything. The only thing it's going to be interactive is where we happen to dump the upper right corner stuff that is part of your system. They'll automatically backload into that form is, I guess the best way to say it, right?

ALEC

1:18:42 Right, right. And, and keep in mind too, if you, for whatever reason didn't wanna do that, you don't have to do that either if you want them to, you know, fill out every.

JOHN

1:18:49 Form you can do that. I have to fill that hard out and it's all correct?

MAGALI

1:18:55 Okay. I get how your...

JOHN

1:18:56 That works. Okay? I understand it.

ALEC

1:19:01 Yeah, yeah, no worries. Cool. Well, I do wanna be respectful of your time. I know we went a little bit over there. I mean, do you, I mean, do you guys have a hard cut? I don't know if there is. I know you were kind of, I think telling Emily that you guys are kind of in a time crunch, but.

JOHN

1:19:21 We're trying to be respectful of your time but get as much out of this as we can.

ALEC

1:19:26 Okay. Well, let me double check. Yeah, I didn't seem, I had some meetings earlier.

MAGALI

1:19:31 I have.

ALEC

1:19:32 More time if, you know, we need to go.

JOHN

1:19:35 We're good.

ALEC

1:19:36 Okay. So, I know we've basically gone over the mobile app, gone over an invoice kind of gone over. What else would you guys want to go through today? What else do we need to go through?

JOHN

1:19:48 Yeah, po systems.

ALEC

1:19:50 Okay. So, how are you guys cutting POS right now?

JOHN

1:19:54 Or through an app that I have just a shitty little po app that I use and I just issue is on each or share my screen and there. And here's my little po app that I use. And I just, you know, I just here's, my purchase orders and I just, I'm basically uploading attach it to, you know, it's like here, I needed a motor where Bob is gonna go to do repair. I just attached that to the work order. So I have, I know where I bought it and how much I paid for it. Okay. So.

ALEC

1:20:37 And, do you like, is it fine that you're cutting those POS in that little app or kind of indifferent towards that?

JOHN

1:20:44 As obsolete and you can even download it anymore. So it's apple app, things, you know? So I'd rather be able to do it in the system if I could, okay?

MAGALI

1:20:57 Alex. So I can explain to, we have kinda two different purchase orders, one to just purchase material that John does most of it. But on occasion, if we have a sub contractor, it kinda like the flip flop. Now we're, the vendor per SE. So we have to send them a purchase order for them to sign the contract. Basically our contract. I guess we could call it so that when we hire especially if it's a public job, I need a contract with a signature. I've learned.

ALEC

1:21:29 Yeah, I'm sure. Okay. Let's kinda break that down into two individual things. So subbing, how often are you subbing? Are you subbing 10 percent of the time? 20 percent of the time, I'm sure it's a little different between service and projects, but I mean, how often are you guys subbing?

MAGALI

1:21:49 Not often. We just started recently. John feels like it just was a one time thing, but we do, I mean some of the subs are like a crane company, and if we're on a public job, they have to pay prevailing wages. So we need a contract from them or them send us a sign something?

ALEC

1:22:08 And are you just doing that like the contract through e-mail or something like that, I assume, or how are you kind of executing on that contract?

MAGALI

1:22:16 That's usually through an e-mail or the one customer that's a sub? Well, no, we're a sub for them, but for subs for us.

JOHN

1:22:28 Really haven't got a system put together. Yeah, because this is all brand new.

MAGALI

1:22:34 It's possible I've missed having subs when doing this but I took a glass and learned with prevailing wage work or public jobs, I got to be better about making sure we get contracts from our subs and who is the sub because it?

ALEC

1:22:48 And are you guys subbing out more on the project side or the service side? Do you have an idea?

JOHN

1:22:55 It'd be a little bit of both projects? Okay?

ALEC

1:23:00 Okay. So just to touch on that, so service trade, you know, we're a service management software first, we can handle moderate complex, projects where you own the relationship as far as like if you're subbing out a lot for your projects, we're not the best platform to handle that. Now, as far as the po thing, so we do have this add on product. It's called partsledger. So I'm assuming you, it sounds like to me, you don't want your technicians cutting POS, it's something more for the office. Is that correct? I just want to be sure. And I'm not trying to be really tedious. I'm just trying to understand so that I'm giving you the proper information. Are you guys ideally cutting POS in the office or is that, do you want your technicians to be able to do that too?

JOHN

1:23:52 I, rather than not, they, they're too busy doing their own thing. So it would be something myself motherly Robin even Bob would be doing.

ALEC

1:24:03 Okay. Because I mean I wanna really recommend the partsledger for the ability to cut POS. Usually if people, you know, want partsledger, it's more for, you know, other things. So if you give me one sec, let me, since I already completed this, I wanna make sure I can show you this. So what I'd recommend is either keep cutting POS through that system or some people cut POS through Quickbooks, you can absolutely put those in here. So for example, I can put a parts vendor, let's say, for example, I ordered it at home depot. I can put in a purchase order number. If I want one, I can select the status. So has it been ordered? Has it been received? Not yet ordered? Whatever I wanna do? And then I can, you know, put a delivery date in there as well.

JOHN

1:24:59 And this isn't tied to our general address. This is more just internal to the jar.

ALEC

1:25:04 React, correct that. That's one way to do it is if you're cool. You know, cutting po is the way you're doing it or cutting POS in Quickbooks, you can do that. What some of our other customers have done is use the job number as the po. So, you know, I know numbers can get kind of unique in this industry. But like you could do like just copy and paste this job, right? Job number. And then if you wanted to do like the job number and then hip.

MAGALI

1:25:34 In a, or...

ALEC

1:25:35 Whatever you could do that, that's an option too. As far as cutting POS, it is something we can do, but I mean, I don't really know what your budget is. I want to

really buy parts ledger just for the ability to cut POS, but you can't manage the, you know, there's you know, ways to use the job number or cut them in your current systems and you can attach things to. So if you need to attach receipts, you can always attach those to the.

ROBYN

1:26:01 Quarter two.

ALEC

1:26:09 Any questions on that? Is that kind of what you were looking for?

JOHN

1:26:12 What is it? What part? What do you look like?

ALEC

1:26:17 Yeah. So I'm not the one that does those demos that'll be one of my sales engineers that's basically an inventory module, so it can help you track status of ports on the trucks.

MAGALI

1:26:30 I said, I mean if you're not keeping inventory on the trucks, stuff like that.

ALEC

1:26:35 And the only reason you'd buy that is for the ability to cut a po, I think you try one and see the value there. I mean, I could definitely set you up with someone if you wanted to take a look at it. I don't really know. I know you've kind of gone through a couple of vendors. So I don't really know if I'd be within your budget or not because you would have to go to our premium plan, but I wanna really recommend it if that's the only reason you'd be interested in.

JOHN

1:26:59 And, and, I appreciate your candor about it so that, that's fine. I mean, we can probably work that around. I mean, you guys are looking more like, I don't know, do you think he's looking more like sky boss guys?

ROBYN

1:27:20 So, I have a question, not a project platform. What do you mean by that?

ALEC

1:27:26 So we're not gonna do. We're not like a Construction platform. We're not gonna do.

MAGALI

1:27:30 Like Aia billing.

ALEC

1:27:32 We're not gonna work well with GC and we're not gonna help you sub out a ton of work on your projects.

ROBYN

1:27:38 Okay.

ALEC

1:27:38 And I, and I didn't say we weren't a project platform. I'm just saying we're not a project first platform. We...

ROBYN

1:27:45 Platform...

ALEC

1:27:46 First, and then we can handle light to moderate projects depending on your budget as well. I mean, we do have some project management functionality like if you guys have change out orders, work in Progress, manage budgets, if any of that, you know, rings true or something that you'd be interested in. Those are definitely things we can do, but...

MAGALI

1:28:08 Far as like super complex you?

ALEC

1:28:10 Work with the GC or, you know, super complex a billing that's not in our wheelhouse and just telling you that because I know you've been... I don't know how to put it in the most, you know, mature manner, but it seems like you've kind of been over promised a little bit. So, I just wanna make sure I'm being completely transparent.

BOB

1:28:28 With...

ALEC

1:28:29 You guys on what we can do and what we can.

ROBYN

1:28:31 No, I appreciate that. Thank you.

JOHN

1:28:33 Wait, big time. We.

ROBYN

1:28:35 Yeah.

JOHN

1:28:37 Because, you know, the other person, I mean, it horribly over promise and... but I mean, yeah, okay. We have to work with our inventory a different way. Okay? I get it. Our, our time keeping may or may not go over to you guys. I get that. That's what I'm saying. It's more. It seems like it's more skybosh is.

ROBYN

1:29:07 I agree as far as like for you for like John's how do I say it? Like you're things that need to be invoiced and stuff like that. Do you have to go into a report to find out or like... do you know what I'm saying? John? Like how skyboss has it.

JOHN

1:29:26 Yeah. So, yeah, skyboss, you know, when I get into, let me jump out here. You're good.

ALEC

1:29:36 Your time?

JOHN

1:29:39 Being being.

ROBYN

1:29:40 So we don't lose track of, you know, stuff.

ALEC

1:29:44 Yeah, yeah. No, it makes sense. That's what most people don't want to lose track of stuff.

ROBYN

1:29:49 Yeah, it just, yeah. So in short.

MAGALI

1:29:55 There's a lot of way.

ALEC

1:29:56 To do, you know, service trade is definitely not a super simple system. So, there's a lot of ways to do it. The two.

MAGALI

1:30:00 Main ways to do it is one we have.

ALEC

1:30:02 A service dashboard and I'll show you that here in a sec after John shows me what he wants to show me the service dashboard.

JOHN

1:30:09 Let's just go to your search dashboard because it's gonna show the calendar and all that stuff. And that's gonna be important to. So we jump back into our meeting and I'm here. So let's keep going.

ALEC

1:30:23 Okay. Yeah, that's fine. So the service dashboard, this is in the office, what you'll see right? When you log in. Basically, it's cool to give you a high...

MAGALI

1:30:31 Level.

ALEC

1:30:32 Overview of the different stages of your workflow?

MAGALI

1:30:34 Hello, you?

ALEC

1:30:35 Now... we'll see a simplified daily schedule here. So what's going on in the business today?

MAGALI

1:30:44 Well, also see overdue jobs?

ALEC

1:30:45 Appointments. So these could be PMS or service.

MAGALI

1:30:48 Calls.

ALEC

1:30:48 Instead of them slipping through the cracks, service trade will give us a heads up. Hey, we need to go ahead and get to these. We also have jobs that appointments do in the next two weeks. So, these are jobs that we need to get to in two weeks. Service trade is just giving us a heads up... and then we have pass jobs to be more complete. So.

MAGALI

1:31:12 These are work.

ALEC

1:31:13 Orders, remember when I went to the field and I call...

MAGALI

1:31:15 Locked out, these are where the work order.

ALEC

1:31:17 Have been complete. It just goes into this review bucket for someone to look over before passing it on.

ROBYN

1:31:24 Bill.

JOHN

1:31:27 Okay.

ALEC

1:31:27 And then we have, you know, this is obviously a demo account. So we're not really invoicing anyone but, you know, for you guys, it'd probably be a lot lower but essentially, you could see all the completed jobs to be invoiced. So, the idea here is that the dashboard gives you a high level overview, if we want to run reports on this stuff, we can, but we can kinda get visibility on this stuff, right? When we log.

JOHN

1:31:51 Okay. So, let me, can you show me a month view?

ALEC

1:31:56 Yeah. So like I said, our scheduling and dispatch, we're putting a lot of resources. It's not that it's you know, all of our customers are using it right now, but that's definitely one of the big initiatives for us and have to on developing as far as what it looks like, right?

ROBYN

1:32:12 Now.

ALEC

1:32:13 This is what it looks like. It's a simple extension. Yeah. So this is just a simple extension. All this is telling you is what's going on a monthly basis? Don't pay attention so much to this on the left. Yours won't be as complicated. It'll just be your five technicians.

JOHN

1:32:33 And we can use colors and stuff like that.

ALEC

1:32:37 So, each technician has a certain color and you can see that here. I don't know, but you guys a color blind? So.

ROBYN

1:32:46 Perfect. My.

ALEC

1:32:48 If you just click on these jobs, it's just gonna take you to the job.

JOHN

1:32:52 We have a, I have a friend that's an electrician that's color like how he does his work. I'll never figure out.

ALEC

1:32:59 Yeah, no, I get that. And I'm not, I'm just being a little dramatic. I'm not like medically color blind. I'm just saying like, I'm not like definitely 70 spectrum. Yeah, no, I get.

MAGALI

1:33:10 Quick quick question. Like on this calendar, can we, and I think we may, I may have actually asked you. I'm getting confused now between all these different. Can we put like when a guys on vacation or so? When John is looking at the monthly or I'm looking at it that I can say they're going to go on vacation this day or they need time to go to the doctor or myself? I don't get scheduled for jobs, but I'd like to put that, hey, I'm out of town this week or something like that or for the day. So.

ALEC

1:33:43 I'd say for the overall company, you might be better off like using like an outlook or something like that. But for technicians, you know, which just like, you know, dispatching technicians, scheduling technicians, that thing I told you earlier about how you can set up a location to be either pto or sick or vacation. Basically, the way you can do that is you can dispatch a fake work order and what that would show up. Like for example, Shelby, let's say Shelby on Tuesday was sick, you could create a sick location or an out location and I'll just tell you in the office that Shelby is out. So that's kind of how you could.

JOHN

1:34:25 Do that. I was saying that. That was what we said earlier model. It's using each person's home address as a location and that's where they get the vacation and sick time, all that.

MAGALI

1:34:37 Yeah, but it creates, a job you're saying for each time, right?

JOHN

1:34:41 Yeah.

ROBYN

1:34:42 Walking time basically.

ALEC

1:34:45 Right, exactly. And, and the hope would be that if you saw it was to his address, you'd be like, and then you could cancel it or whatever once you don't need that.

ROBYN

1:34:54 Quarter anymore.

ALEC

1:34:56 Even make it just an ongoing work order, you know, multiple appointments, stuff like that kind of different ways to do that. But, yeah.

BOB

1:35:04 And, can the technician do that on the mobile app?

ALEC

1:35:11 Can you create a work order on the mobile app or be listed as out on the mobile app?

BOB

1:35:15 If he can, if he can say, I'm gonna be out on Friday the twelfth.

ALEC

1:35:20 So, like I said, that's probably a better function for like some kind of HR or payroll software, you know, just to let you guys know basically where the software industry is going. Is there's like two types of software there's, the all in one system, which is stuff like your Foundation, your Sage, they claim they can do everything under the sun. And then there's the best of breed solutions. Best of breed basically means that you have multiple softwares that do specific functions. Service trade is going to help you manage your work orders, you know, upsell to your customers, improve your customer relationships, we can dispatch, can schedule, you know, can get things to adp, stuff like that. But as far as like kind of more HR or like high level, you're probably better off doing it another system. So as far as him requesting time off, I know in the time card module, he can, you know, put in his pto and tell you

guys, hey, I was out this day. You need to pay me for pto as far as requesting time off, that's there's probably a better way to do that. Yeah.

--- Small Talk ---

MAGALI

1:36:24 Not necessarily requesting but that we put it on the calendar since when we're looking at it like let's say I'm doing payroll. It's like this guy didn't show any time he was on vacation, that's why?

ALEC

1:36:36 Yeah. So for that, when he submits his time, you can even put in pto or sick time, vacation time, stuff like that. So when he submits this time card, he was out for a couple of days sick, he would just put in a field sick and you could do that for Monday, Tuesday, eight hours, whatever. And then you could approve that. If he submitted a doctor's appointment or, you know, whatever something like that.

--- Small Talk ends ---

ALEC

1:36:59 Yeah. And I can definitely send you a little bit more to about the time card thing as well, or if you guys wanted to take a look at that, we could definitely set up a demo for that.

MAGALI

1:37:13 Okay. Yeah. We're trying to avoid like having the guys to do two different places, like for us, it doesn't matter. We're just hourly whatever. But for the guys, they're going to have to clock in to this company to service trade to so that, you know about the job, then they're going to have to go over to busy and clock in so we can keep time. Does that make sense? We gotta get all the administration straight stradministrator S on... the time keeping system too, but it sounds like service trade doesn't have that option.

ALEC

1:37:51 I can definitely double check, but to my knowledge, the timecards really more designed for the technicians compare to, you know, you guys in the office submitting stuff like that. But as far as like for the technicians, I don't know if you guys use busy as well, the technicians can absolutely, you know, use time card and that would ideally replace busy. But like I said, I mean if you're happy with it, you know, you could always just keep using it. I definitely understand you don't want to use multiple systems. So, I mean I'd probably recommend maybe looking into time card. I'm you know, the service trade expert. I definitely know a lot about these other products. But as far as setting up a time card where they could maybe answer more of your specific payroll specific questions, we could definitely go over that. If that's important to you. I just don't want to give you any false, you know, information, but I think most of what you say we can accomplish it's just, you know, service trade. Like I said, it's a service management software first more than anything else handle projects, work orders and stuff like that can take GB snapshots. We're not like an HR software just basically.

ROBYN

1:39:02 Trying...

JOHN

1:39:03 To let you know.

MAGALI

1:39:04 Can you show me how my biggest thing to find out is as John creates, I guess what's and it's something we're still kinda we keep track of it one by one, on a spin spreadsheet but table to look at when he starts. I guess a job and I guess it's just, I have to keep track of it so that I can figure out if it's prevailing wage, how much is it? So I can get paperwork done on that.

ALEC

1:39:35 Mentioned tags a little bit earlier that's one way to do it. So if I wanted to just tag every job with a prevailing wage?

ROBYN

1:39:46 What I can do?

ALEC

1:39:47 That... and then there's a way to.

MAGALI

1:39:51 We just call it dr or whatever. Yeah, so that it pops up that, I know, okay, this is a dr job.

ALEC

1:39:59 Right. Yep. Yeah. So you can do that. We also have this concept in service trade called job types. I don't think we have those job types in our system that you mentioned, but some customers for more industry specific stuff, you can make a certain job type associated with, something along those lines. But the tags is easy way to see that stuff like that.

MAGALI

1:40:26 I can just pull up a list of tags or something like that. Like I wanna see all these tags.

ALEC

1:40:38 So, for example, prevailing wage, I can see, I have eight jobs and four invoices. It seems like you're...

JOHN

1:40:44 That does.

MAGALI

1:40:47 Like John, when you start a work order or whatever you wanna call it an estimate. If you tag it right away, prevailing wage, then I would see it on here right away would be one way. I guess.

JOHN

1:41:02 I just make that tag when I'm doing the quote. Yeah.

ALEC

1:41:07 So you can see, even I use it, you know, just to make sure my people aren't deleting my stuff. So I can see these are all my kinds of things or, yeah, it's a cool tool that you can definitely just makes things searchable. So you can.

JOHN

1:41:21 Do that. Okay? So.

MAGALI

1:41:24 A flow over when you convert the estimate or quote and it converts it into, a job.

ALEC

1:41:35 I don't know that off the top of my head, I could definitely double check that, but I think the idea would be that the quote would be tagged. And then if you needed to see, you clicked on the quote, you'd see it got to a job, but I don't know that off the top of my head honestly.

JOHN

1:41:50 Everything and everything attachments all flow over from the quote to the job, correct?

ALEC

1:41:57 Yep. So, you know, if you get a quote... so you would want the pictures from the quote to come over to the job, I'm assuming like if you took some pictures of the deficiency, you'd maybe want those pictures to go over and then maybe take some more or something like that.

JOHN

1:42:15 Yeah. And, and as far and as well as, my vendors and everything. And now it's a job. Now, I'm gonna start issuing po.

ALEC

1:42:24 Yep. So you can do all that. You can transfer attachment stuff like that. If that's...

JOHN

1:42:27 You want, is it automatically do it?

ALEC

1:42:30 So, I believe it's kinda similar to when I showed you the service link quote, you're in control. It'll give you the option. Do you want to transfer the attachments over from the job or do you not, you can set it as automatically you want to because it seems like that's what you wanna do and then it.

JOHN

1:42:47 Yep. Okay.

ROBYN

1:42:49 I have a question on the dispatch or do you have a weekly as well?

ALEC

1:42:55 Yep. So I do just want to preface by saying a lot of this stuff should be changing. I don't have an active timeline on these updates. I could definitely send you a video on what it will potentially look like. It's all on our website. But as of right now, we have two main scheduling tools. So we have the dispatch board which is better for reactive daily scheduling, seeing what's going on in the business today. And then we have our map based scheduler which is better at seeing a weekly view.

ROBYN

1:43:22 Okay, perfect. Okay.

ALEC

1:43:24 And then, and then I already showed you the extension which is the extension was just a monthly view. All you can really do with that is just click on the jobs, kinda get a high level view. Essentially here you go ahead.

JOHN

1:43:38 Actually, that's all we're really after on the month. We just wanted to kinda give that helicopter view of like what's going on?

ALEC

1:43:47 Okay. Yep. So here, you know, you can add jobs. You can see what jobs are available, what jobs are unassigned. So it would just be five technicians for you guys or six I believe actually. So you can see all that here. And then as far as this map based schedule and my internet is acting up a little bit today. Just give me a sec, essentially the map based scheduler. There's all kinds of ways you can filter it, don't get too overwhelmed with this. But essentially, this is going to give you that weekly

view. And some of our customers like this because I don't know maybe someone calls in and you wanna see who's close, kinda similar to the similar to the monthly view that I showed you. Every technician has a color. So we can see here, yellow sea. So let's say we have someone calling in Greenwood forest. We might want someone that's near Scott shells to go over... stuff like that. Now, basic drag and drop functions, you.

ROBYN

1:44:44 Got all that here.

ALEC

1:44:49 I think you're Mike. So I don't know if you're just talking to someone or talking to me?

JOHN

1:44:53 No, my microphone.

MAGALI

1:44:55 It's on. Okay. Yeah, no, I was talking to you. I'm sorry about that. You're good with the customer to see all the service addresses under them. I'm not sure if I missed that or not.

ALEC

1:45:09 Yeah. I know we've gone through a lot, so no worries. We did go through that, but I'll just show you again. So basically, we organize our customers on a Bill to ship to basis. So I can see for example, if I service five targets, each target will be associated with this one billing location, but they'll all live under this one corporate umbrella and each page will have its own set of contacts equipment you guys work on stuff.

JOHN

1:45:34 Like that?

MAGALI

1:45:36 It looks like the filter location. Like if I just start typing a portion or it says, I don't know, if I have, does it strictly go by the beginning of the name or like if we're not sure how we labeled it so that we're not duplicating, what does that make sense?

--- Small Talk ---

ALEC

1:45:53 Yeah. So you have some, I mean, how would you like to do it if it was, you know, because I, I'm assuming you're saying that because you just see target Pittsburgh?

MAGALI

1:46:01 Yeah. We actually have, we'll have an example for one of the counties we have ever Martin park, George Lane park, Loma, Alta park, Steven soon park. So all these different parks and it'll end up on more than one page or, we, maybe we miss it. And then we got duplicates of things.

ALEC

1:46:22 Okay. Gotcha. So one thing I do want to preface is that, you know, if you guys did move forward with service trade or if you were a customer, we do give you an implementation specialists that, you know, helps you learn how to use the system as well as you have an account manager. So if you're ever struggling with something, we're not gonna, you know, we give you a point of contact that's here in the states. We're not just gonna leave you hanging. So I definitely don't want you to think that, you know, you need to retain all this right now.

--- *Small Talk ends* ---

ALEC

1:46:49 But as far as these names is up to you on how you name them. So this was just name this way. I believe the reason that happened is that some of the reps that were using these locations are no longer here. So sometimes they clean them up. This target. Pittsburgh is the one I use. So if you want it to be, you know, whatever you're like brand name location or whatever it's up to you on how you name it. We're not forcing you on how to name it. You can name it whatever.

JOHN

1:47:15 You wanna name it.

JOHN

1:47:21 We, sometimes we'll have a property and we'll use target Pittsburgh. Okay. That's a location we have, we work for that same target in Pittsburgh. We might work for the target in Pittsburgh direct. We might work for the target in Pittsburgh for more system or we might work for that same target, for a general contractor and under a different parent name, so that sub account could be built three different ways. There's a way to change that on the fly who we're billing?

ALEC

1:47:57 Yes. So when you Bill, you can change. So if you want to organize it this way, but then when you Bill, you got to Bill someone else. You can set multiple billing locations. So if you need to change the billing location once it's time to invoice.

JOHN

1:48:10 You can change that because I'd like to, we want to be able to keep, all the equipment in one sub account, but be able to choose which parent account we want to invoice.

ALEC

1:48:23 Right. Okay. Yep. So you can definitely set multiple billing locations. They'll just be all organized under this one thing. But if you had a target, I think you said target GC, target something you can.

JOHN

1:48:34 All that, did you show us how, you would change billing addresses or how you would do that?

ALEC

1:48:41 Yeah. So I believe, give me one.

JOHN

1:48:45 One sec, we do that.

MAGALI

1:48:48 While you're doing going to, can we have multiple names on a customer? Like you have your accounting department, your engineer, your salesperson, so that if I need to go to that customer, I can see here's who I talk with before because some places you're limited to one name or two names and it's like kind of a pain. Does that make?

ALEC

1:49:11 Yeah, yeah.

MAGALI

1:49:13 When you finish what you're doing, yeah?

ALEC

1:49:15 I'm gonna show you that real quick. It's pretty simple.

JOHN

1:49:18 You showed us that, you could add as many as you want. It looks like.

ALEC

1:49:23 Yeah, no, no limit. We use Amazon web services.

JOHN

1:49:27 You have no limit.

ALEC

1:49:28 To data, but yeah, you can, I have a couple of roles in here. You can have accounting management owner onsite contact.

ROBYN

1:49:37 Whatever.

MAGALI

1:49:37 Okay.

ALEC

1:49:42 So, let me see. The problem is that I keep completing that job is kind of, you know, I just gotta find a job that I could do that for real quick. So just give me a sec. Let me just find.

JOHN

1:49:55 Complete the job and go back into it after it's been completed.

--- Small Talk ---

ALEC

1:49:59 Yeah, I can. So I'll just do that.

JOHN

1:50:02 Good. I'll do that all the time.

MAGALI

1:50:05 Dries, any nuts that throws off my account?

ALEC

1:50:09 And...

BOB

1:50:10 Then Alec, and then Alec on the calendar, let's say we've got a continuous job and it's gonna be say, I'm gonna work Monday through Wednesday and then I have to go back on next week, you know, Tuesday, Thursday, Friday. And in the schedule, can we have like visit one visit two?

ALEC

1:50:30 Yeah, yeah. Let me... I can show you that. I definitely want to show it. John is just, some of these questions are easier to show you than tell you. But in short.

MAGALI

1:50:39 I agree.

ALEC

1:50:40 Yes. And, and I do have to go here in about probably 15 to 20 minutes because I do got some things I need to send to folks, but essentially, this is an example of a multi day job. So the verbiage stuff like that completely up to you guys, but you can see here that, in this example, this is just one of my examples. I have one on the second one on the third one on the fourth. And then for whatever reason, I have to go back on the seventh.

JOHN

1:51:11 This all under the same work order.

ALEC

1:51:14 Yep. So it's all under the same work order. So you can either have multiple services on a work order or multiple appointments. So if it's one service meaning one project, that's gonna take me three days, I can have one service and then multiple appointments, and then each appointment you see on this example here, I know it's not specific to your industry, but I have phase one scope of work, phase two, phase three. I have all that and I could make it August second, August fifth and August eleventh. You know, I didn't have to, it's not gonna restrict me to keeping them all together kind of thing.

JOHN

1:51:47 Good. And I can put it on different days.

ALEC

1:51:53 Yep. So you can see here that you have Alec hardest worker on the job.

--- *Small Talk ends* ---

ALEC

1:51:58 He's doing every other thing. But if, you know, that wasn't the case, we could put, you know, Ben in for this day.

JOHN

1:52:04 And you...

ALEC

1:52:06 Know, and the tech can have visibility on who did what, you know, if you want, you know, so you can put in this day and then I could installing in this day. So you're kind of up to you on how...

JOHN

1:52:19 You've answered it. It's perfect.

ALEC

1:52:21 Okay.

ALEC

1:52:26 And then...

JOHN

1:52:27 Multiple the property and multiple billing thing. Do I set it up the property, as the primary thing? And then choose who I want to go to late on when I call up that property or do I have to put that property under a master account?

ALEC

1:52:45 Is you have to put the property under a master account? So this is how it's organized. So the property would be here's, your primary billing here's, your five physical locations, your service. And then if you had to change it, if you click this managed job button, you can always go in and change the Bill too. And you can create multiple Bill too. So if for whatever reason I needed to change this... can't spell?

JOHN

1:53:19 No, it's good.

ALEC

1:53:22 I saw cosco in here. I don't know what's going on.

JOHN

1:53:25 Just try one.

ALEC

1:53:27 So we could do, you know, walgreens corporate, you get the drift, you know, there's I can put multiple billing locations in here. So I can always make adjustments.

JOHN

1:53:35 Like that. But so I just don't have to be aware where when I call, I can call the once. Once the property address is enter, I can just search for that property address. And then when I'm making that call, I just select who I want to build. Yep. Exactly. Yep. Okay. I got it.

MAGALI

1:53:59 Is there a global to remove a name? Like because we have this one customer, there's probably 30 sites or 60 sites because, they just hire us to do a lot of the jobs. And my question is now a person leaves and we have his name or her name in each one of these property addresses. Any chance there's a global search to say remove and put this person or just remove? How?

ALEC

1:54:31 Is that?

ROBYN

1:54:32 Happening?

ALEC

1:54:37 I'm...

MAGALI

1:54:37 Mean, there's probably a handful of customers that, that's kind of.

JOHN

1:54:43 Is gonna be one that's, they change all the time.

MAGALI

1:54:48 And, nor, well, not north so much.

ALEC

1:54:52 Yeah. So I just wanna make sure I understand you correctly. So, are you saying like just remove the contact or like make the location inactive? Like we don't...

MAGALI

1:55:03 A contact person?

BOB

1:55:05 Change the contact for the whole global account and only have to do it once?

ALEC

1:55:11 And I'm assuming is that for more billing or more on site communication?

MAGALI

1:55:15 On site communication.

ALEC

1:55:17 Yep. So I know you would do that.

MAGALI

1:55:19 In, for me, I'll be going through it and it's like wait a minute. I don't think this person's here anymore and we have their name under 20 different customers or locations. So.

ALEC

1:55:31 One way to do that. There's a decent amount of ways you could do that, but you can set headquarter contacts. So these are contacts that you guys deal with at the corporate level of the billing level. And then if you needed to remove them, you just click this X button, and then at the location, you'll have your location contacts as well. So you this, like for example, I have five locations. I don't have I just have this just for my portal. But if I had Alex Ashley in here, and now it's Thomas ashbey, or something like that. I can create a new one.

JOHN

1:56:04 Whatever. So, right there, okay?

BOB

1:56:08 All right. Thank you.

ALEC

1:56:10 Yeah, no, no problem. Cool. Well, as far as you guys, I mean, I know we went through quite a bit today and I appreciate the level of detail and the questions. Do we need as far as core service trade, do we need to go over anything else as far as just service trade? I know we kinda talked a little bit about some other things, but as far as like service trade, is there anything else you guys need to see?

JOHN

1:56:38 Right there, I just saw something which we do every now and again merge location. Is that, yeah, we're all of a sudden, we've created a location twice. Is that for merging the two together?

MAGALI

1:56:54 Yeah, I'll...

ALEC

1:56:55 Be honest with you. That's not a question. I get too often. I could send you. I believe that's when kind of what you just said right there. I'm not exactly sure I could send you a support article or I could actually probably just look that up real quick on.

ROBYN

1:57:11 Support.

ALEC

1:57:13 To let you know what that is.

JOHN

1:57:15 But will end up duplicating, that property... under a sub account?

ROBYN

1:57:24 Yep. Okay.

JOHN

1:57:27 Give me one.

ALEC

1:57:32 And then what while we're talking anything else to any other?

JOHN

1:57:38 Answered a lot of questions for me, so.

ALEC

1:57:42 I try, man. Yeah, I know. Yeah, I definitely don't know. I've been doing this quite a bit. So I'm definitely pretty familiar with most of the things in here. There's just a couple of specific questions that sometimes I don't hear every day.

ROBYN

1:58:00 Let me see.

ALEC

1:58:03 Yep. So this is, here we go. And that's the cool thing about us too guys, you know, unlike some of these other software vendors, you know, we've been doing this for, you know, 10 years. So we have a pretty robust support center. I've actually heard some mixed things about BuildOps support center, but like I don't even I just pulled this up in a matter of seconds. So if you guys ever had a question, I mean, obviously, you have a point of contact, but I think that's exactly what you mentioned John right there. You can Adam put here from time to time, you may find that you have a duplicate company or location and need to merge them the process of merging. So that's exactly what.

JOHN

1:58:44 So, at.

ALEC

1:58:45 I found that in real...

JOHN

1:58:46 Time. So, yeah, unfortunately BuildOps really kind of, I don't know way over promise and under deliver. We, our onboarding person ended up leaving the company, which is a late bunch of stuff. And we got a time crunch and, you know, the trainer that's posed to be training is doing more showing than training. And, you know, I mean, what you've told us today, we learned more about your program than we've learned with him in two weeks. Magali.

MAGALI

1:59:23 Yeah, it's... how do I explain it? It seems to like way in that you can't see the whole big picture. When you're working on it. It's it's very confusing where this one seems a little more streamlined, you know, like I can see like I get the monthly calendar. I can see way out in the future where that one take, you know, a long time to see where we are in December or where, you know, November because John one, I try and put, if we have three week job that's gonna last three weeks, we want to be able to see where on a calendar we can get a three week span or what. So, no, I like this one is very, really user friendly. The go the go and the training program had had the nerve to tell me that some customer.

JOHN

2:00:16 What they've had to do is put four screens on four monitors on their desk so they can see the entire month.

MAGALI

2:00:25 How...

ALEC

2:00:25 Interesting.

MAGALI

2:00:26 Are you kidding me? They did the monthly calendar. The system would crash. I guess they put everything, all the information goes on the calendar. And so that if you got the month, there's just too much memory or whatever.

ALEC

2:00:42 I don't know if I trust that. It sounds like she might have just said... yeah, I mean, yeah, no, and I definitely don't want to, you know, just keep doing them or whatnot but just so you know, I mean, we have heard that from customers. I mean, anytime you're purchasing software of any kind, if at some point in the process, they aren't telling you, no, we don't do that or no, that's not our forte. If they're never saying that unless it's like Salesforce or some humongus company that just has, you know, a bunch of product development budget, then, you know, it's probably kind of a red flag if I'm just being honest, but I know though. And I get it. I know BuildOps BuildOps, they're actually a lot of their executives come from a company called ServiceTitan which is more of a residential software. BuildOps is originally built to be in my, from my understanding, I metrical project management software. Now, I don't really know when they pivoted to kind of doing this other stuff. But really their whole thing is, you know, they're out of, you know, we're out of Durham, North Carolina, which is kind of, I guess the tech of the east. They're out of silicon valley. So they're trying to get a lot of market share right now which, you know, makes sense. But, you know, what they'll find and they'll probably they're a younger company than us. We're you know, a 10 year old company. They're three year old. Is that really just like any other business? If you can't keep customers happy renewing every year, you know, gonna be so successful at it. You know, I know BuildOps. I'm sure. When you looked at, it looks good. I've seen, you know, videos. It's look good looking software. It's just if they don't have a process that can get you live or if they can't set proper expectations or support you, then it doesn't matter how many sales they can get to get you in the, or if they can't keep them happy. You know, we've had a lot of people lately come to us and kind of expressed some of the same things. I just don't want

you guys to feel like you're alone. I mean, there's definitely happens from, you know, it's happening like every month now. I mean, I'm probably for every five demos, I do, I probably hear a story like that mainly too because BuildOps targets companies that are similar to our, the companies we target so obviously that's there, but I don't want you to feel alone but that's definitely unfortunate that you've learned more with me because I'm not even really a trainer. I just know the system a lot because the way we kind of run our sales cycle, so to speak, because I'm kind of the engineer and the salesman. I'm not just here to sell you on a vision. I'm here to also make sure you're comfortable with the functionality. So I do that. I am sorry to hear that though that's definitely an excuseable the fact that you've learned more about our system in two hours than, you know.

BOB

2:03:23 Let...

ALEC

2:03:23 Me believe.

JOHN

2:03:24 Many... programmers. Do you guys keep on staff, or, do you work your workout to programs?

ALEC

2:03:35 When you say programmers, your friend, people that are coding the software?

JOHN

2:03:39 Yeah, working within your software to keep it up to date moving.

ALEC

2:03:44 Got you. So the people just like, yeah, okay. I believe don't quote me on this. I don't really know. I'd say it's in the 45 65 range. I don't really know the exact number. I know some of the people that are programming coding. Some of them are over season and some of them are in the states, but we do have a big team that does that and we got a big investment from JM a couple of years ago as an 85,000,000 dollar raise and funding and we've used most of that funding to my knowledge to invest in our engineering team. That way when our customers make request the product, we can get to it, you know, obviously, it's a timely manner so we can do it overnight for some of these things. But I know it's definitely a thing we have a big team for sure.

BOB

2:04:30 You know, Alec, I believe, you know, I had to hire a bor company because I was too busy and I believe when they sent the quote over, it was with, on the bottom, it said service trade with California boilers. And...

MAGALI

2:04:47 Yeah, I was gonna say that that's two Bob, their invoice looked just like that one.

BOB

2:04:51 Yes.

ALEC

2:04:53 Yeah, we have boilers, is definitely one of the new verticals that we work a lot with. I know I've signed up two really big boiler companies this year. I'm pretty sure that sounds familiar. I know that... we have a lot of companies out in California, full disclosure. I mean, what's your name had a call at six? I'm normally working in the east, I'm just filling in for, the west today, but that name does sound familiar. I wanna be surprised if they're a customer. We do have a lot of customers out there in California obviously.

BOB

2:05:25 Well, good.

JOHN

2:05:27 I'm doing well.

BOB

2:05:27 All right. I gotta go to first.

JOHN

2:05:29 Alec. Thank thank.

BOB

2:05:30 You so much.

JOHN

2:05:31 Bear you much.

ALEC

2:05:33 Yeah, yeah, no problem. So, as far as you guys, I mean, are you guys looking at anyone else besides service trade or where kind of you have with your evaluation?

JOHN

2:05:44 We, we were, it was the other one we're supposed to look at and that's the company that the guys left.

ALEC

2:05:51 Yeah, they're more residential. They're also pretty expensive, but, you know, never a bad idea to look at multiple things, but we're going.

JOHN

2:05:59 We're gonna keep a meeting with them, Alec and we're we'll be talking tomorrow.

--- *Wrap-up* ---

JOHN

2:06:05 Probably. Do you have contact information or do I contact if I want further this and move it to the next place?

ALEC

2:06:14 Yes. So that would be me. I'm gonna be your point of contact throughout your evaluation. I'm gonna send you a recap e-mail tomorrow. It'll probably come in really early for you. Not so early for me because I'm on east coast time, but I'll send you a recap e-mail I'll have this demo recording, some stuff like that. The only thing is that caught my eye here and I know we've been here for a while so I definitely wanna make sure.

--- *Pricing* ---

ALEC

2:06:41 So I saw here that you guys correct me if this got lost in translation, but you guys... like we're trying to get live by September or start. I was just a little confused.

JOHN

2:06:55 What you.

ALEC

2:06:56 Guys are ideally trying to do.

JOHN

2:06:57 September thirtieth is a drop dead date. The sky boss goes dark and... this is what the BuildOps kinda put us in this position. And now we're scrambling because, we work for lack of better words, fires remorse, you know? Yeah. So, we are kind of under a gun at the moment.

ALEC

2:07:27 Okay. So just to let you know, typically companies with ServiceTrade can go live to two to three months. We have a very indepth process, very strategic process. It typically takes companies two to three months to go live. So, I mean, we've had companies go faster, but I also don't wanna, you know, just kinda tell you, hey, you can go live in 14 days and you don't so I know today... 15 slides got taken up.

MAGALI

2:08:00 We have a...

ALEC

2:08:01 Couple of slots or one slot left for nine one. And basically that window basically meaning that from nine one, you'd have a two, three month window to implement service tree and make sure you're live, make sure you're comfortable. So I don't know how quickly you're looking to make a decision, but.

ROBYN

2:08:19 Yeah.

MAGALI

2:08:19 Tomorrow?

ALEC

2:08:21 Okay.

MAGALI

2:08:22 Yeah. Say that we gotta do it tomorrow.

ALEC

2:08:26 Okay. Well, if that's the case, yeah, I mean, I can't make any guarantees. We do have one slot. So you guys have six technicians. Is that correct? Like six guys that go out to the field?

JOHN

2:08:43 Well, six.

ROBYN

2:08:44 Six.

ALEC

2:08:46 Okay. Yeah. So essentially six. So... give me one sec. So the earliest implementation date. We have one slot left for nine one. That would basically lock you in. It is like I said, it typically takes companies 60 to 90 days. I don't know if you're flexible with skyboss, if you could extend that because a lot of companies like to run two parallel systems until they're live.

--- Pricing ends ---

ALEC

2:09:17 Because I mean, if service tighten tells you that they can get you live in a month, I'd probably be a little careful of that. I don't know if you're what you're gonna think about them or whatnot but if you want, we could set up a meeting tomorrow and we could go through what your evaluation was of service tight in, you know, where you're gonna add your evaluation, and then we can go from there as far as what direction, you know, stuff like that.

MAGALI

2:09:46 A...

ALEC

2:09:47 Little busy tomorrow. So, I would wanna make sure I'm making time for you. I'm definitely open to that. We could set up a follow up meeting and I could kinda walk you through how much this would cost, what the onboarding would look like, stuff like that.

MAGALI

2:10:00 I ask.

--- Pricing ---

JOHN

2:10:02 You've been upfront with those. I mean, completely transparent with us. I mean, tell us the good and the bad about service time. I mean, just, give it to be brutally honest. I mean, am I wasting my time?

ALEC

2:10:19 I mean, I feel like you are to be honest, but it also depends on your budget. So service title is more of a residential software. Now. They claim they're getting more into the commercial.

ROBYN

2:10:34 Yeah, that's what I said. It's like we go residential that.

MAGALI

2:10:37 I think we should do it anyway to convince us that this system service trade is better.

JOHN

2:10:43 Okay. So, so, we're gonna say unless we say no to or say yes to them, we're gonna say no to them, basically say yes to you because everything you've shown us is more sky boss, is you guys, I would say.

ROBYN

2:11:03 Okay.

JOHN

2:11:04 So far, what is the cost?

ALEC

2:11:08 Yeah, no worries. Just give me one sec. Let me pull it up here. So with your projects, are you guys doing a lot of budgets or work in Progress change out orders or do you just need what you see today? Just a multi appointment each thing today kind of thing. Just wanna be sure.

JOHN

2:11:35 What's this go up the ladder? What did we see today?

ALEC

2:11:39 So everything you've seen today is available on our select plan. So this is what you'd be looking at as far as our select plan. The only reason you would want to go up to our premium plan is maybe you need a little bit more project management that's always something you could grow into in the future. But basically, this is what you'd be looking at. So we Bill annual... basically, this is what you'd be looking at for six technicians on select in your first year. You'd be looking at this 10,000 number. What that's basically gonna cover is your onboarding. So you're going to have a point of contact here in the states that's gonna walk you through onboarding service trade, get your data in the system, make sure everyone's trained. Once you guys are done with onboarding, you also have an account manager, a point of contact. So this is what you'd be looking at in your first year. Then after your first year, you'd be looking at six four eight. So that's what you'd be looking at there. So that's basically how the cost is looking.

JOHN

2:12:46 Okay.

MAGALI

2:12:49 A service time card. Okay?

ALEC

2:12:52 Yeah. So the service time card is 14 dollars per tech. It's pretty inexpensive for what it does. You could always upgrade to that in the future or if you'd want to start with that, you could as well if we put that in there, just basically putting you up about 800 dollars. There's no extra onboarding for that. So.

--- Pricing ends ---

MAGALI

2:13:12 I think that will hold off till we can at least get going on everything else. I got a quick question. You had mentioned that it takes two, two to three months. Is that training or just to do where you mirror and work on the same thing?

ALEC

2:13:29 Yeah, great question. So really the difference between the people that go live super quick and the people that don't go live super quick is data submission faster. We have your data. You have it in the system and you like what you see, it's pretty straightforward from there.

MAGALI

2:13:44 I mean, that's what happened with service sky boss, pretty much they did what they did in the background and then we went live and that was, it never went back to service autopilot.

ALEC

2:13:53 So, typically we alleviate two to four weeks for data submission just because some people get busy stuff like that. Then after that, we have technician training. We have office training, admin training. You'll meet with your project manager every week. So their job is to make sure the project's going on schedule. You guys are going up to date to before the project even starts. Like once you sign with service trade, you'll actually set up a kickoff call as well so you can go over with them, your goals, what you guys are trying to accomplish stuff like that as well as what we do before we go live if you want, we can do some use, test, use, case testing. So before you go live and test things out, we kinda just do some testing, make sure. Hey, this happens. How do we do this that way? When you're live, you're not learning on the fly. We definitely have a little article that kinda walks through how that times alleviated. I could definitely share that with you too, but, you know, just as at a high level, you go to service trade, dot coms, onboarding. This kinda just gives you a high, not really specific but just high level of, you know, what goes into each thing. So yep, you can look at that, but I can send you some more specific if you want to. But.

JOHN

2:15:19 Yeah.

JOHN

2:15:23 Okay.

ALEC

2:15:25 Cool. Any, any questions on that or?

JOHN

2:15:30 No.

MAGALI

2:15:32 Trying to think what I there was.

JOHN

2:15:34 I wanted to ask.

MAGALI

2:15:36 That just so you know, we do what is it like 300 invoices a year. So it's not like we're doing, you know, we got all five guys or six guys on six different jobs a day.

ALEC

2:15:51 Okay. You can add multiple people to.

JOHN

2:15:54 You want? Yeah.

ALEC

2:15:56 That's fine that.

JOHN

2:15:57 Didn't really affect anything?

MAGALI

2:15:59 I was just thinking for training that you thought it might take too long because we got so many jobs going on the same day.

ALEC

2:16:05 No, the tech training is pretty straightforward. So the tech training is only about two hours. So it's like a learning course that's the shortest, one of them pretty straightforward. Honestly, some of our technicians just find the app easy to use. They don't even.

JOHN

2:16:19 Really need.

ALEC

2:16:19 It, but we supply you with that as well. So that's usually the most easy part of the process. But anyways, we have a couple of options here on, you know, what we wanna do next one, if you guys wanna talk to service, tighten before making a decision, you can absolutely do that and we can go from there or two if you want. I can go ahead and send you over an agreement. You can look it over. You could have that meeting with tighten if you don't like it or you don't you know, whatever, and you wanna go with us, you'd already have it in your hands. You already have something to review. You can do that just kind of up to you.

--- Next Steps ---

ALEC

2:16:57 I mean, do you want me to just follow up with you guys tomorrow to see how that meeting goes or see what's going on? Or would you rather me just go ahead and

send one out? Since we only have one slot left for that nine one slot, just kind of up to you. I don't wanna, you know, force you to do anything?

MAGALI

2:17:12 After that, when's the next one?

ALEC

2:17:14 So it be 915. So it's every 15 days. We have one left for nine one and then four left for.

JOHN

2:17:22 All right.

MAGALI

2:17:25 And you temporarily put us in there and send us the contract?

ALEC

2:17:29 Unfortunately, I mean, I can always put in a good word. Unfortunately, it is kind of first come first serve. I can definitely see if we have any out right now if you want me to check. I mean, when's your meeting with it, is it tomorrow morning today or?

JOHN

2:17:46 Today?

ROBYN

2:17:47 Today?

ALEC

2:17:50 Okay.

JOHN

2:17:54 So, hey.

ALEC

2:17:54 Little...

JOHN

2:17:54 Well, here's the other thing Alex, which has already gotten me a little bit a little bit concerned in first, they kinda said no, we can't help you, okay?

--- Next Steps ends ---

JOHN

2:18:04 And then they kinda came back and what, no, we can help you, then they were kind of, you know... back. We wanna make sure there's six technicians and he's just trying to really hone it in, to make sure that I don't know that we fit their model. And it sounded like we were kinda halfway in halfway out of what they can do for us. Does that sound like the story that you get about them title? Yeah.

ALEC

2:18:34 At times, I mean, one thing you have to understand too is that a lot of times just what rep are you dealing with? You know what I mean? Like your experience talking to Alec from service trade might be different from, you know, someone else from service trade, but I've heard that. Yeah, I've definitely heard that. It sounds a little sketchy to me. I mean, if it's just me, I mean, like I said, they are more residential. So if you don't do residential, I mean, I really highly doubt that you'll see anything there that, you know, will be like, wow, this is commercial based because I know you told Emily like, hey, we're looking for something commercial. We don't like house call pro. So you're gonna just see a more robust house call pro. I mean, you can do a lot of cool stuff, but it's also pretty expensive too. To my knowledge. I mean, they're more expensive than our.

ROBYN

2:19:26 Test plan.

ALEC

2:19:28 So, like I said, I don't wanna pressure you.

--- *Wrap-up* ---

ALEC

2:19:31 I mean, if you wanna take a look at it, you know, feel free. I don't really think that we would run out of a slot that quickly if you're taking a look at them today, I think you'd be, you'd get a pretty good idea if that would work for you or not. So I don't really think that would be a bad idea but.

MAGALI

2:19:48 She's kind of up to.

ALEC

2:19:49 You, I mean, obviously.

ROBYN

2:19:50 You guys have seen.

ALEC

2:19:51 Some quotes for some big companies in CA. I mean, we're kinda, you know, we do this.

JOHN

2:19:56 You send us a contract today?

MAGALI

2:19:58 And then we, if we do it tonight, you'll have it first thing in the morning when you come in.

ALEC

2:20:04 Okay. Yeah, that works. So I'll just go in and send it over. Feel free to look it over. If you have any questions about it. Let me know. I'll make it expire for Wednesday to give you guys plenty of time to talk with tighten or if anything else comes up, feel free, but I'll get my accounting team to send that over, John. Would I just be sending that you?

JOHN

2:20:21 How about you? What?

MAGALI

2:20:24 Let me send it to me, which it's Magali at. Well, you send me, I think that.

ALEC

2:20:32 I got your e-mail yeah, I'll just send it over there. Let me know if you have any questions, but I'll go ahead and send it. It's an actual agreement definitely, you know, make sure you're reading through and take your time with it. And yeah, appreciate probably the business, I guess you think about it, but yeah, I'll go ahead and send that over to you guys. If you have any questions, let me know and I'll still send that recap e-mail tomorrow morning.

MAGALI

2:20:58 And...

ALEC

2:20:58 I, when I send you a quick e-mail too, so you have my contact information.

--- *Wrap-up ends* ---

MAGALI

2:21:02 Okay. I do have a quick question. I'm looking at your screen and where it says service forms 49 dollars per month per tech. What, what do you mean there? What's that? So?

ALEC

2:21:13 Basically service forms, we have two forms. The form capability I showed you today, which is similar to what you're doing. Now. Like I said, it's even on this, it's 149 per page. If you want us to take your forms, make them fill able PDF. It seems like they're already fill able PDF. So there's no charge for that service forms. It's something that honestly more of our fire protection customers use compared to our mechanical or boiler companies use. It's just the varsity version of forms. So some companies use that if they want to get their forms done quicker or they want their conditional logic, I don't really think you would need that now that's probably something you might explore two to three years from now, I guess might keep being the keyword, but that's just a more robust form capabilities. It gives you conditional logic. There's a way like if they find a deficiency on the form, it'll go back to service trade. It's probably a little bit more than you need. But it's kinda the varsity version of forms.

MAGALI

2:22:14 I just didn't want all of a sudden, we think we can do this. And when we start doing it, find out that, no, you got to be charged for your forms.

ALEC

2:22:22 No, no. So the only way we charge you for the forms for what we went through today is if you had some forms that weren't available PDFS. And for whatever reason you wanted us to take those forms and plug them in available PDF, if you had a two page form that you'd use at multiple locations, I'd be 149.

ROBYN

2:22:38 Per page.

MAGALI

2:22:40 Yeah, no, I can do those.

ALEC

2:22:42 Yeah, that's what I figured. So what's gonna be on the agreement is you're gonna have the annual subscription and then you'll have the account. It'll it'll be something along the lines of like account set up in data migration, and then you'll have this asset import as well. So this basically it's just all the customer equipment that you guys track now is gonna make sure that gets in the service trade that's all that's going to be on the agreement. And then, you know, in the future that service time card. If you guys want to explore that once you're live or maybe in the winter, that's 14 dollars per tech per month billed annual. So I believe for five techs, it's 840, probably slightly below a 1,000. If you wanted to add that, you can explore that.

MAGALI

2:23:25 Do you have the demo on that one that you can send me or something? Or?

ALEC

2:23:32 So I don't we could set up a demo. I'd say if you wanted. I don't think we should set up a demo now, but what you could do is if you go to service trade, dot

com, you go to features, you go to timecards there's like four simple videos on the website that'll give you a high level overview. I wouldn't really set up a meeting till you're ready to potentially purchase it, but this should give you a pretty good idea of what the tool?

JOHN

2:23:56 Hey, Alex, one quick question as far as on service or skyboss, have you done a lot of migration of people coming from skybos to you guys?

ALEC

2:24:10 No. So I haven't to be honest, I haven't really run into that name, but all we really need is the data to be in an excel file or access file? We can bulk import it.

JOHN

2:24:19 From there.

ALEC

2:24:19 So, our team imports from a lot of different systems, you know, BuildOps fusion house call pro tied in. So as long as you can get that in a CSV or excel file, you should have no issues getting into our system.

JOHN

2:24:33 Okay. You have those files, Magali?

MAGALI

2:24:37 Yeah. I even, I believe I sent my log into, is it Emily?

ALEC

2:24:43 Front line? She like books the meetings on. I don't know if you might just want to send that to me, I could definitely double check it, but you shouldn't I mean, you shouldn't have any issues bulk exporting things out. But if you do, you know, regardless of what system you go with, that's just going to be the case. I don't know what a BuildOps kinda tell you. I guess.

JOHN

2:25:04 Never even got into that part. Well, actually, you have Magali, where are you at with that?

MAGALI

2:25:09 As far as importing it, I sent all this stuff to her and she can log in. So, I don't know if she's even done that yet Lacy?

JOHN

2:25:18 Yeah.

ALEC

2:25:18 Okay. Well, yeah, I don't really think you have any issues, but like I said, I just, we just needed an CSV excel file or access. We have there's multiple files that we have, so.

JOHN

2:25:32 We give you access.

MAGALI

2:25:34 You guys go in and do it?

ALEC

2:25:37 Well, I mean, just to be transparent, it's not, it's if you, if, for whatever reason, you can get that into an excel or access file and bulk import from there. We're not gonna double data, enter the data in there for you. But I mean, I really highly doubt to be honest that you wouldn't be able to do that. So if you wanna call them and just double check... we could definitely do that, but.

JOHN

2:26:05 Yeah. Okay. And, and as far as support it's support comes with.

BOB

2:26:13 Early subscription.

JOHN

2:26:14 Correct.

ALEC

2:26:16 Right. Yeah. So all that will be, you know, in the agreement as well. So feel free to look over what's included, but you're getting support for, you know, customer success or customer service for more minute things. You'll also have an account manager, you'll meet with every quarter if you want. They're your first point of contact, you can book meetings with them. Like for example, if you guys want to explore time card in five months that'll be your point of contact for that or if there's specific workflows you wanna work with, you can book a time for that. So that's included.

--- Next Steps ---

JOHN

2:26:47 Yep. Okay. Well, you mean other questions, Magali?

MAGALI

2:26:54 No, I'm good for now.

JOHN

2:26:56 I'm so send male information. And then with this contract, it'll be good to Wednesday with that September one day, correct?

ALEC

2:27:05 If no one takes it as far as what I've seen, I don't think because we just ran out of 815 today, I don't think we have any out. So, I mean, it seems like you take a look at tighten, you don't like tighten and I think you'd probably be fine that expiration dates more for, yeah, that, but I'll let you know if we have someone send out an agreement for that nine, one day. I'll be sure to send you guys an e-mail or give you a call, but I do not believe we have.

ROBYN

2:27:34 One out right now for that.

BOB

2:27:36 Day. Okay?

JOHN

2:27:38 So we would want that.

BOB

2:27:40 One date as part of taking the agreement today?

JOHN

2:27:43 At least having, that security that we protected.

BOB

2:27:47 For...

JOHN

2:27:48 At least one to.

BOB

2:27:49 Two days.

ALEC

2:27:51 Okay. I mean, like I said, I think you'd be fine today or tomorrow. I can't really do that. That's not really. I mean, I just can't but I'd say as long as you do it today or tomorrow, you should be fine. I'll let you know if anything changes, but we don't have any agreements out if you want. If it makes you feel more comfortable, I could just make it expire tomorrow, but all the expiration really does just not make it

actionable. It's not the expiration don't really have too much to do with those dates. It's more.

ROBYN

2:28:18 You're...

JOHN

2:28:18 Also late in your day. Your, your day is almost coming to an end out there anyways.

ALEC

2:28:23 Yeah, exactly. But, you know, we do business with people in the west as well. So, obviously, so, but your day is almost done. I don't see any.

ROBYN

2:28:32 Out right now.

ALEC

2:28:33 I'm also not the person that oversees that apartment, but I'd say if you do it today or tomorrow, you'd probably be fine.

--- Next Steps ends ---

JOHN

2:28:39 Would you at least make a call, that person give heads up if someone else were to be coming to contact us for first write a refusal?

ALEC

2:28:51 I mean, I can ask, I can ask, but I don't just being realistic. I don't really know if I could do that, but I can ask, I'll definitely ask and I can let you know what, but it's just first comfort or is kind of.

JOHN

2:29:03 I...

BOB

2:29:04 Think, you know.

MAGALI

2:29:04 We're serious.

ALEC

2:29:06 I know you're serious. It's just, this is kind of the system is just so I'm saying, I mean, if it was me, I'd be like, yeah, absolutely. I'll hold that for you, but it's just there's other people, you know, sending stuff out stuff. So I can do my best.

--- Next Steps ---

JOHN

2:29:19 I'm just trying to lock it as far as I can for our company.

ALEC

2:29:24 Okay. Now, when you say your meeting was with Tyten, you said our...

JOHN

2:29:28 Four o'clock this afternoon?

ALEC

2:29:30 Okay. You'll probably be fine. I mean, I really doubt you'd have an issue, but I think the first step is just getting it in, you know, your guy's hands that way it's in your hands and I'll give you an update if anything changes, but I'll go ahead and get that in your hands.

--- Next Steps ends ---

ALEC

2:29:46 I'll see what I can do as far as seeing, I can lock that in for you, but I'll go ahead and send that to you. So it's in your hands. And if you guys don't like tighten, you sign either today or tomorrow. I think you'll be fine.

JOHN

2:30:00 Because...

ALEC

2:30:00 I don't see. I don't see any.

JOHN

2:30:01 Happen right now. So, I mean, at that point, we're on the clock because like the forms and stuff, we're gonna have to have those things ready to upload as soon as you.

BOB

2:30:13 Guys start.

JOHN

2:30:13 Doing our onboarding and stuff like that. So we got some front end.

BOB

2:30:17 To do as far as.

ALEC

2:30:19 That's why we have a gap in between that time and that's also why you can book that kickoff call. So if you guys sign the agreement, essentially, what will happen is I'll send you an e-mail introducing you to customer success, someone, his name is DA, he's our senior manager of implementation. He'll send an e-mail where you can book a kickoff call. So be.

ROBYN

2:30:39 Before...

ALEC

2:30:40 That nine, one day even starts, you already know that point of contact, you can kind of express some of these things to that person. So you'll have that.

JOHN

2:30:49 Okay. Thank you, Alec.

ALEC

2:30:52 Yeah, no problem. Super. Nice meeting you guys. I am sorry though about some of the experiences you guys had with software. I'm hoping that, you know, we'll be a long term vendor for you. So you're not doing this every, I know it's not fun evaluating software. I'm sure it's not the most fun thing in the world, so.

JOHN

2:31:10 Person on this phone is retiring in five years. So, you, this is it for us.

ALEC

2:31:15 Okay. Gotcha. Yeah, I know. I've definitely heard that before.

ROBYN

2:31:19 Okay.

MAGALI

2:31:21 Thank you, Alex.

ROBYN

2:31:23 I...

ALEC

2:31:24 Got one. Okay?

ROBYN

2:31:25 All right.

The End