



# **Call with Rich-Tek Industries Ltd - Dave Beulens**

Jonathan Middlemas with Rich-Tek Industries Ltd  
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## **Participants**

### **SERVICETRADE**

Jonathan Middlemas  
*Territory Manager*

### **RICH-TEK INDUSTRIES LTD**

Dave Beulens  
*General Manager*

# Topics

<i>Pricing</i> .....	9:11
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# Transcript

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DAVE

0:00 Good morning is Nicole speaking?

JONATHAN

0:02 Hey, Nicole, is Dave available?

DAVE

0:04 Sure. Hold on one moment.

DAVE

0:19 Hello? Speaking.

JONATHAN

0:20 Hey, Dave. How's it going? This is Jonathan with service trade.

DAVE

0:24 Hey, Jonathan?

JONATHAN

0:25 Hey, catching up with you from last Friday when we spoke, I know you had some questions. I got some answers for those. And then I wanted to check in and see if you had, you know, signed up and started working in, the trial account.

DAVE

0:33 Okay.

DAVE

0:40 Okay. So to your quick question, there is no, I haven't I've just been tied up with a bunch of other projects and it was a short week for us this week. So I haven't had a chance that I thought I would on that one. So I was gonna play with out in the next couple of days here just to kinda see what's going on and go from there.

JONATHAN

0:50 Hum...

JONATHAN

0:56 Gotcha.

DAVE

0:58 So, okay. So then answers my questions, where are we at? For those ones?

JONATHAN

1:05 Yeah. So first of all, kind of the easier of the two, you can search by serial number. So essentially, whenever, you know, build out a piece of equipment, part of that is going to be the serial number that's just gonna attach to, the general description. So it's something that's definitely going to be searchable. And it would just pull that up.

DAVE

1:14 Okay.

JONATHAN

1:28 And then as far as the question about...

JONATHAN

1:33 You know, the asset history being able too move between, you know, different essentially like Bill two, customers, you know?

DAVE

1:41 Yes.

JONATHAN

1:43 Yeah. So that's doable as well. You are able to, whenever you like create the work order to go do the service, you can change the Bill to address. So, if it's not gonna be too like the property owner, but rather, you know, the manufacturer or whomever you can change it. So the bills correctly. But then the history for that piece of equipment stays with that piece of equipment.

DAVE

2:03 Right.

DAVE

2:09 Okay. So the, that, sorry, so like would it be set up almost like a sub contract or something like that, is, would that be a correct way that it would get termed within the platform?

JONATHAN

2:22 No, you wouldn't have to set it up as a subcontractor because essentially, the way, you would set it up within the platform is, you know, the physical property that, the assets located on, you would just, you know, create a work order for that property and just... you know, change the Bill, to make sure that you build the correct party. So it's pretty simple.

DAVE

2:33 Huh.

DAVE

2:41 Okay.

DAVE

2:44 Right. Okay. Yeah, no, fair enough. Now, the other thing too that I'm just kinda thinking about as I was going through steps of how we do things and to convert it to using it into the platform is when we do the initial commissioning, we may not know like who the building owner is going to be. Typically, it's going to be like a strata or something like that. So, if we were to create the building?

DAVE

3:14 And trying the, we create the site, let's put it that way. Can we change the owner information later on? Like just for all intents and purposes, is that we're going there to do the commissioning at the beginning stages. So then we could just put in the building owner as like a generic piece of information. And then we change it or even if it was to be so like it was owned by.

DAVE

3:44 B, and then it gets sold to Reo. Can, can we change that ownership of the building or would we have to create a whole new entry for that building?

JONATHAN

3:55 No, you can, excuse me, you can create, yeah, change the ownership. So we have a lot of customers that basically their customer base is property managers. So, you know, that's something that's pretty common.

DAVE

4:06 Right.

DAVE

4:09 Okay. I didn't think that was going to be that big of an obstacle. I was just trying to think of how to process that because ideally, what my plan is that we will create a profile for a building. So, my example was Dave's tower, and then, the strata corporation. So, the BCS 25 55 will be the owner of that building. But then so we can build the asset list underneath that. And then if we have to go work on a piece of equipment, is that we can build that out to whoever we need to. But until we find out

who the actual legal owner will be, which will be a month or two down the road. We'd have to put something in there and then update it as we get that information.

JONATHAN

4:25 Huh.

JONATHAN

4:54 Yeah, that, I mean, that sounds like that would pretty much be how that workflow would be in, you know, that way you can build different people into, you know, exactly who's going to be, the long term owner.

DAVE

5:00 Okay.

DAVE

5:05 Right. Okay. And then as we go down in time or go out in time, so, let's say two years down the road, when we click or look at that piece of, or that asset is, we can see all the different people that we have built for that or like so that all of that asset history will be connected to that piece of equipment. Is that correct?

JONATHAN

5:27 Yeah. So excuse me for that piece of equipment. Like it would have, the work orders essentially.

JONATHAN

5:34 You know, aligned to it, and if you clicked into each work order, you would be able to see who you build that work to.

DAVE

5:41 Right. Okay. And is there a, like, I don't know the best word, but is there a barrier so that when the technician is on site that they don't see the pricing that's an access level that we can grant to the technicians or take away from the technician, correct?

JONATHAN

5:57 Correct.

DAVE

6:00 Okay. Let me play with, that trial thing and just kinda see how everything all works out. As I said, it sounds promising. As I said, I just, we're looking at a couple of different ones to see which one is going to be kind of our, the best suited for our needs.

JONATHAN

6:14 Yeah. Who else I can't remember, who else are you looking at?

DAVE

6:17 So, we've kinda narrowed it down to service trade, ServiceFusion and build ups are, the top three right now.

JONATHAN

6:26 Okay. Gotcha. So, yeah, I'm familiar with the ServiceFusion, and build up to a certain extent. Have they been able to kind of meet, your needs as far as, you know, tracking assets, and different things like that?

DAVE

6:40 So in terms of that, yes. So the, I, I'm more familiar in terms of like I've had more conversations, with service rate and ServiceFusion. So I'm going to be a little bit better versed in what I know at least, what I understand it's probably going to be a good way to put it. Is the... there's a split between what is going to be the better advantage. So in service trade, from what I can tell so far is that the platform, is predesigned for fire protection industry, which is going to be easier, I think for the initial setup because when you click on it, it's gonna already have the equipment ID such as fire pumps or whatever else. But when I was, when we were doing that demo is that it showed the whole list of all the items that like all the fields that you can fill out for information such as her numbers models, makes all that other stuff, but I can't...

JONATHAN

6:57 All right.

JONATHAN

7:22 Huh.

DAVE

7:37 Modify again, correct me if I'm wrong. I can't modify that list. So whatever is in that list is going to come up to be entered every time that we enter a fire pump into that piece of into that database.

JONATHAN

7:51 Correct.

DAVE

7:52 Whereas with the ServiceFusion is that we can build our own field list. But what I understand with that one is that because we work on more than just fire protection equipment, is their list is going to be the same list for every piece of equipment, no matter what it is. And that is the one that I'm kinda waiting to get confirmation as to how it is, because like again, when we were doing our demo, is that when you selected fire pump, a list drop down of all the fields. And I'm assuming that's going to be different if we select a I guess circulator pump or something like that. Is that the list option would be suited more for that pump versus a fire pump. And that's one of the things that I, I'm not 100 percent sure as to which is going to be the best way to do it.

JONATHAN

8:33 Yeah.

JONATHAN

8:40 Yeah, yeah. Absolutely. So I mean, ours is like you said more geared towards the specific industry, there might be a little bit more broad.

JONATHAN

8:49 But yeah, I mean, pretty much, what we've spoke about is exactly how it's going to be handled in service trade.

DAVE

8:56 Because the other thing to going through my notes as to our conversation is that there's going to be certain things like if we wanted to be able to create a purchase order within service trade is that we had to get an add on feature for that.

--- Pricing ---

DAVE

9:11 So, I was just worried about extra charges as we go through like as we want to add more onto it, is that there just be additional charges to it? Whereas where the ServiceFusion platform is, that is basically a flat fee and you get anything that they offer all encompassed at the same time?

JONATHAN

9:30 Yeah, potentially, I mean, that's how we work. So, I don't know how ServiceFusion is really structured, in that.

DAVE

9:36 Yeah, no. And, and I don't expect you to understand that. I said again that's just one of, the differences that I have come across it because one of the scenarios that I'm looking for is that we can more or less do everything within the one platform. So once we get that request from the customer is that we can send the quote that's built into the tray or into the ServiceTrade platform, we can then they approve, that comes back into it. We can schedule through the platform. And then ideally, as we move along, is that we want to be able to add on that we can... incorporate our Sage. But as I said, I think that when we were talking, is that again, that was an add on to do the Sage integration?

JONATHAN

9:41 Gotcha.

JONATHAN

9:52 Yeah.



JONATHAN

10:16 Huh.

DAVE

10:17 And actually, I don't remember, we can do Sage within the platform, but we had to get that add on, right? Yeah.

JONATHAN

10:22 Yeah, there's additional fee to set up that integration absolutely.

DAVE

10:26 Yeah. And, and is that a one time fee or is that an annual fee?

JONATHAN

10:30 I believe it's annual.

DAVE

10:33 Okay.

DAVE

10:35 And what was that be? Do you know, or?

JONATHAN

10:38 I don't know that's something that would have to be kinda scoped out by, the software engineers and, I really don't know what it ends up being.

DAVE

10:45 Okay.

DAVE

10:48 Okay. But so that would be an annual fee that again, that I just have to take into account for that because with the service rate is also built by the technician. So as we grow, the cost of it will become higher as well.

JONATHAN

11:05 Yeah. So as you grow like any pretty much you'll have to, if you get a sixth seventh eighth tech, then, you know, those licenses, are added on.

JONATHAN

11:15 You know, we just charge per tech. So I don't know how many people would be using it in the office but that, that's all included in the pricing.

DAVE

11:23 Yeah. Okay. Let me sign into that. The trial version and kind of player because I think that's going to be.

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DAVE

11:28 I said one of our biggest deciding factors on that is to how those, the selections come into play because as I said, the, what I can kinda see upfront is that everything is all pre formatted in terms of the service trade. But then, it may have too much or not enough. And as I said, I just wanna make sure that there's information that I can use for the other pieces of equipment that we work on as well.

JONATHAN

11:42 Huh.

JONATHAN

11:51 Yeah, absolutely. I'll maybe give you a call sometime next week if we've had some time to get into, the trial account at that point and, you know, more than happy, to answer your questions and kinda figure out what makes sense?

DAVE

12:00 Yep.

DAVE

12:05 Yeah. And if you can kinda find out like the budget price as to what I can, what would be anticipated for the integrating the Sage at capability? Because, that is something that I want to move on.

JONATHAN

12:15 Yeah. Is that?

JONATHAN

12:19 What is?

DAVE

12:22 Sorry. Well, we want to be able to invoice through our Sage accounting software because I know that you guys integrate out of the box, with Quickbooks, but all of our historical data is with Sage. So we're trying to keep that.

JONATHAN

12:28 Can I help?

JONATHAN

12:33 He?

DAVE

12:39 With everything going on?

JONATHAN

12:41 Yeah, I can certainly look into that, which version of Sage are you using again?

DAVE

12:48 I believe it's Sage 50, but I would have to confirm 100 percent on that.

JONATHAN

12:55 Okay. Yeah. Let me know because I think that plays a role, into what it ends up costing just because of how many man hours I think go into setting that integration up.

DAVE

13:05 Right, right. Okay.

JONATHAN

13:06 Yeah, just verify that and I can get, you know, some ballpark numbers.

JONATHAN

13:13 Is ServiceFusion and BuildOps? Do they have an integration with, Sage?

DAVE

13:18 So, BuildOps, they do, they actually integrate with many different accounting softwares, ServiceFusion. They don't actually... integrate, but they have a API like an open data thing where you can... write a code and it will force it into Sage.

JONATHAN

13:39 Yeah.

DAVE

13:39 So you have to go like with, their pro option and so then you can have that built into it. So basically is a one time fee that I would have to talk to a code writer. They write the code and they actually give you the information is what they need to do and then it just, it forces it into Sage. So it doesn't integrate but it is, I'm gonna be say compatible with.

JONATHAN

14:00 Yeah, that's interesting. I'm not trying to downplay anything, Dave, but, I would be careful of that. It's probably a little bit more difficult than the they're maybe

leading you to believe... and I know we have relations with customers like, it takes us, you know, a long time, with a team of engineers that have done it before. So.

DAVE

14:16 I'm not disagreeing with you. Is, is that it? Yeah.

DAVE

14:28 Yeah. And I'm not denying that at all either. As I said, it's just, those are one of the options, that are out there because I do need to be aware like ultimately my end game is that everything will all be done within the one platform.

JONATHAN

14:39 Absolutely.

DAVE

14:43 But... the lady that handles the accounting stuff right now is that she's not super convinced that she wants to have it all integrated at this moment. So, I do have to go in kind of baby steps. We'll make some transitions, and carry on from there.

JONATHAN

14:59 Yeah, that makes sense. That's common kind of a common way to go about it as well. So I'll get you the information from my end about, you know, what we're looking at once you get me over, you know, the, if it's Sage 50 or 100 or whichever one ends up being. And then you got, you know, you'll have that. So you can, you know, make a decision on if you want to just go full integration or maybe just put in service trade and eight, 10, 12 months down the line, look at the integration.

DAVE

15:15 Yep.

DAVE

15:28 Yeah, exactly.

JONATHAN

15:29 Okay. That's fair. Let me know what you find out and then I'll send you over, you know, some rough numbers.

DAVE

15:31 Right.

DAVE

15:37 Perfect. Sounds good. Alright. Yeah, you too.

JONATHAN

15:38 Yep. Have a good one.

JONATHAN

15:40 Bye.

*The End*