ServiceTrade Demo with Record Energy Concepts Inc

Meda Piner with Record Energy Concepts Inc
Recorded on 11/9/23 via Zoom, 1 hour 10 min.

Participants

SERVICETRADE

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Territory Manager

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RECORD ENERGY CONCEPTS INC

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OTHER

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Shawn Bavender

Topics

Transcript

MEDA

0:00 Hey, Marty, there's a chat box feature. Let me know if you don't have audio on your computer and I can give you a way to call in.

MEDA

0:48 No, I think you just, can you hear me all right Marty?

MARTY

0:52 Yeah, I can hear you. How are you doing?

MEDA

0:54 Cool. Good. How are you doing?

MARTY

0:58 Yeah.

MEDA

0:59 Hi. Are we still waiting on Sean?

MARTY

1:05 He'll be here in a second. I think he's grabbing a cup of coffee or something.

MEDA

1:09 All right. Cool. Awesome. Well, I appreciate you joining me today. My name's Meda. I'm one of the terror managers over here at service trade. So we will, you know, of course, run through the software, run through a background of service trade, but I do wanna start with a couple of questions about the business and kinda what you guys are hoping to see today. Do you wanna go ahead and get started or do you wanna wait for Shawn?

--- Purchase decision ---

MARTY

1:34 Go ahead. Okay?

MEDA

1:36 Cool. Awesome. So, I heard that we had a little bit of problems with BuildOps. You wanna kind of enlighten me on that a little bit more and what you didn't like about it?

MARTY

1:48 Wow. We just never got past the onboarding process.

MEDA

1:52 Okay.

MARTY

1:54 Was... it just wasn't planned very well or did the, we were promised the information from our current software with transfer over into their product?

--- *Purchase decision ends* ---

MARTY

2:10 And it just never really happened... and it kinda put it on us too. Like... you know, we thought that they would be more involved, in getting the data, and making it, you know, transfer in. And it ended up being, we had to try to put it in a proper format. And then that didn't work. And then I don't know it was just, it just wasn't a good process.

MEDA

2:43 Got you. I'm gonna kinda ask a loaded question. Is your data, as was that the reason or is it mostly just BuildOps needed it in a certain format and you guys are having to go format everything and taking too much time out of that?

MARTY

3:01 Well, I mean, I defined mess, I don't know.

--- *Accounting integrations* ---

MEDA

3:05 Yeah, I mean, it could be a bunch of different things, right? I guess where is your data housed now?

MARTY

3:14 Well, I mean, it's not a cloud product that we use ESC which support it anymore. It's basically a product, yeah, but it's a SQL server. You know, the data is on our server in Quickbooks.

--- *Accounting integrations ends* ---

MARTY

3:34 I wouldn't say it's a mess but I wouldn't say it's you know... obviously there's something up for it because it didn't go over smoothly with BuildOps. So, I don't know if it was BuildOps because they never said, hey, we have a problem with your data. They just, I don't know it was just a strange.

MEDA

3:57 You...

MARTY

3:58 Know, I feel like, they have not a lot of... people. You know, I was under the impression we have like this big implementation team and, you know, and there'd be like a lot of support and whatnot, and we ended up just having this guy you know, out of, in his apartment of North Carolina now basically handle the onboarding for us with, you know, essentially one one meeting a week that was supposed to last an hour that in reality lasted 15, you know, 15 minutes most.

MEDA

4:35 Cheese. Yeah.

MARTY

4:37 Yeah. We are in the onboarding thing for like several months.

MEDA

4:41 Wow. What in the world?

MARTY

4:45 Still never went live. So filling.

MEDA

4:49 Cut your loss, is there? Yeah, I mean, I hate to say it. I'm not surprised. I do hear it a lot with a lot of companies.

--- *Pricing* ---

MEDA

4:58 They'll be like, hey, we'll give you 50 percent off or 25 or 30 whatever it is off if you sign now. And then what happens is their onboarding is so backed up because they're just allowing anyone and everything anyone to come sign up and not stagnati so their team can correctly support them.

--- *Pricing ends* ---

MEDA

5:18 I mean, it's crazy to me that they only had one person in your implementation when ours is about. I believe four to five people that are helping and kind of in it and, you know, making this successful. So I am sorry that happened. I'm glad you guys cut your losses there instead of, you know, being in a year or a couple of year long contract with them just like trying to make it work because, you know, you're trying to run a business. You don't have time for that. So... what I would suggest, and because I wanna set good expectations and not run into what we ran into with BuildOps, would you be open to sending me a CSV file of your data? Now? It doesn't have to be all of it. It could just be a really small subset. Doesn't need to be any, you know, identifiable information or like invoicing or anything like that. Just for me to pass to our implementation team to see. Was it BuildOps? Is it your data? You know, let's go ahead and set the expectation upfront for us to have an idea of what that looks like. Because if it is your data that needs to be cleaned up. I mean, no one has completely cleaned data, but there could be some things that are maybe a hindrance and that we need to get ahead of early and maybe find a workaround or something like that. If it is something to do with your data.

--- *Purchase decision* ---

MEDA

6:41 Is that something you guys would be open to if we do get down the line and you wanna start with service trade?

MARTY

6:48 No problem. I mean, there's probably something already and so could probably just look at all the emails and forward it to you and.

MEDA

6:58 Yeah, exactly. And let me get my head of implementation to look over that just to make sure there's no glaring red flags or anything and kind of set that expectation of what that will look like for you guys.

--- *Type of work* ---

MEDA

7:12 Cool. Awesome. So tell me a little bit about the business. I see Chris mentioned you guys do service and Construction. Talk to me about that breakdown and where the line is drawn between service and Construction.

MARTY

7:31 Yeah, we're pretty basic company. Well, man, we do majority commercial work, I guess would be the difference with us, you know, 98 percent commercial. We do some residential, but, you know, standard Installation department, service department, fabrication department. Okay. In our service, we do maintenance... as well. And then in our Construction, we do... you know, we do new Construction, we do retrofit guys mainly work for general contractors, do a little bit of prime contracting work. And, you know, I don't know. Does that answer your question?

MEDA

8:20 Yeah, absolutely. It does. So.

MARTY

8:25 12 people in install and about a half 12 people in the service or support.

MEDA

8:34 Okay. And are you looking to get your install guys on service trade or are we strictly talking about straight service today and those six people? No?

MARTY

8:49 I'm really.

--- Type of work ends ---

MEDA

8:50 Well, that's what I really.

MARTY

8:51 Liked about BuildOps is I really liked their product a lot but it didn't but it's just really strong for commercial Construction, and management.

MEDA

9:05 Agree.

MARTY

9:05 So that's really would be great if we could find a product that, you know, is really strong on that.

--- Type of work ---

MARTY

9:13 On that side of the business, we do a lot of projects that, you know, span anywhere from, you know, they could go from one month to 12 months to 18 months. So, you know, we got Progress billings... Aia. We use the Aia form for that, but seems like most software companies for that now and then on the service side, we, you know, we do a bit of maintenance.

--- Accounting integrations ---

MARTY

9:47 So we have maintenance contracts. So as far as the service module goes, we want kind of a full service module that offers the ability to manage maintenance, and, you know, order filters, and everything associated with that maintenance contract. Really nice to have a payroll function, or time tracking function that integrated with the,

with Quickbooks payroll. As far as, you know, timekeeping and the field off an app or something like that.

MEDA

10:24 Yeah. Okay. We can definitely talk about that now. I wanna talk about your projects a little bit because we do have project a project management portion generally. I like to say it's for max six eight month projects. We can do Progress billing, change orders, you know, budget with things like that.

MEDA

10:50 But if it's a job that's like we're not gonna handle Construction, is what I'm trying to get at. We can do a long, you know, service projects may be a longer install, things like that, but something that spans over eight months. I would say you probably need a little bit more than what we offer.

MEDA

11:14 I will show you what we offer and you can make that determination, but I do wanna set, you know, expectations up at front that it's it is pretty light weight because we don't focus on Construction. Unfortunately, BuildOps is someone who really handles Construction, pro core as well is really good with Construction.

MEDA

11:35 So if you don't see what you need to see today with Construction, you know, obviously we can focus just on the service side, but we do have an integration with pro core that would absolutely be able to handle all of your Construction needs.

MARTY

11:50 Okay.

MEDA

11:53 All right. So tell me what we're you know, being able to handle PM contracts and, you know, that kind of recurring service is definitely something that we can do time tracking for text on the jobs. Things like that. We can definitely do. What else are you guys looking for?

MARTY

12:17 On like the Construction side or?

MEDA

12:21 Side. Yeah. Let's focus on service just because that is our, you know, that is what we do over here versus.

MARTY

12:29 Though we still need to move to, you know, mobile paper lists, you know, what we're still using work orders on paper form.

--- Paper process ---

MARTY

12:41 So definitely wanna go paper lists, move to the app on the phone thing and have the ability, to do service, you know, service calls, maintenance, you know, warranty, whatever the call is, handle all that wireless kind of, eliminate the paperwork, kinda expedite the billing process, get stuff filled quicker, yeah, increase, you know, just being able to manage the guys a little better?

MEDA

13:17 Yeah, a little bit more visibility. Okay. So talk to me about your billing. How long is it taking you guys to build things out?

MARTY

13:27 To log?

MEDA

13:29 On it, so.

MARTY

13:32 I portion.

MEDA

13:34 Cheese. Okay. Is that because it's paper work orders and we have a tech that maybe didn't get all the information and has to go back out or paperwork just builds up.

MARTY

13:48 Paperwork retrieval late. You know, you know, we don't get the tickets every day, we get them, you know, every week.

MEDA

13:56 Okay. I see.

MARTY

13:59 Process is really, it would be nice.

MEDA

14:02 Yep. That's definitely something that we can handle for you guys. What about equipment management? Are you guys able to track equipment? What's been done? Who did it? What needs to be done, next, things like that?

--- *Assets* ---

MARTY

14:16 Equipment in regards to like serialized hvac equipment?

MEDA

14:20 Correct. Yes.

MARTY

14:23 Yeah. The ESC has the ability to enter an equipment for all service properties. You can attach files, pictures, that kind of stuff. Okay? I mean, it's a bit antiquated compared to like the newer stuff now.

MEDA

14:37 Yeah, yeah, I got you absolutely.

--- *Assets ends* ---

MARTY

14:42 We just need to update.

MEDA

14:44 Okay. Yeah, I got you. I mean, especially if ESC isn't supported anymore, it's just kinda going out.

MEDA

14:55 I mean, I couldn't imagine using a software and not getting supported at all. That would, that would probably be my worst nightmare. I'm not gonna lie, sorry not to call your reality my worst nightmare, but to call your reality my worst nightmare. It, it really is. Yeah, yeah.

MARTY

15:13 To be live with the other product, you know, a year ago, last November, right after thanksgiving. So we literally wasted a year and a half with that company.

MEDA

15:25 That's such a pain. I'll tell you onboarding should never last over 60 days especially with, I mean, how many texts do you have? Were you on a six plus 12 on there or just all your six techs? I guess you were doing all of them because it's Construction regardless shouldn't have taken that long?

MARTY

15:45 Yeah, I don't think so.

MEDA

15:47 No.

MARTY

15:49 Are we still waiting for the shot or?

MEDA

15:54 Okay.

MARTY

15:55 A little bit on like we just on.

MEDA

15:58 My gosh. You guys do. Sounds like my gosh. That's so funny. Okay. Shawn. Anything that's important to you that we haven't talked about?

MARTY

16:09 Yeah, no, we've been going over some of it and I've been asking some of your questions. So, yeah, we're I think we're right?

MEDA

16:18 Yeah. Well, let's jump on in here. I'll give you guys a little bit of background about us and then we'll go into the tool and do a little workflow situation. All right. So just to give you guys a little bit of background about us, we only work with commercial mechanical and fire life, safety contractors. We have over 1,300 active accounts servicing about 10 percent of all commercial and industrial buildings. And we accounted for about 13,000,000 assets under our management last year. So we are a tech founded company. They noticed back in the market, you know, many years ago that there was no real technology that was focusing on the right things. What they thought were the right things was improving service and project it operations actually setting technicians up for success, selling more service agreements and winning more projects and then growing profitable customer loyalty. So they just felt like all the softwares out there weren't focused on, you know, agreement and sales delivery, that equipment management, the pull through optimization and that customer communication that's really actually gonna move the needle compared to, you know, in the past where it's just softwares to hold data. So what we're gonna do is focus on office coordination, technician, productivity, customer communication management visibility. And we're actually not gonna touch on sales success here.

That is a Northboundary piece that we have. So that is an add on products. It's a completely separate product line for or sales, the optimization of that, running a sales pipeline for preventative maintenance.

<center>--- *ST app contracts and pricing* ---</center>

<center>MEDA</center>

18:01 So we're not gonna touch on that today, but just know that we do have a full suite of products that you guys can grow with. Now, in terms of office coordination, you're going to have everything to manage and execute on your service agreement work. So automatically creating work orders when that works, due, summarizing the profitability at the end of each term. All down to kind of renewing agreements when they expire. So we'll handle everything from dispatching to invoicing for your service work. We talked about it earlier if you need budget whip, change orders, Progress, billing for that Progress work, we can handle all of that. And then of course, you'll be able to easily track and manage all parts being used from POS to warehouses, to trucks, to job sites.

<center>--- *Parts management (inventory)* ---</center>

<center>MEDA</center>

18:48 We find that a lot of folks are just, you know, ordering a ton of parts throughout the day and throughout the week and they get a ton of parts that come in and they don't know exactly what job that part needs to be used on. So we'll be able to make sure that you guys use the right part on the right job as well.

<center>--- *Access to information* ---</center>

<center>MEDA</center>

19:05 As be able to pull a consumption report of what you guys have used and kinda have on hand. And then of course, tracking texts. So them clocking in, clocking out for break time just for accurate labor cost on the job. Then on a technician productivity and do your text have iphones, androids, tablets on hand that they use?

<center>MARTY</center>

19:32 Of android one?

<center>MEDA</center>

19:36 Cool. Yeah, that's perfect. So, they'll have everything on an app that they can use offline. So if they don't have internet access, totally fine, they can do everything that they need to do. So they'll have task lists, location, contacts, complete equipment and location history at their fingertips.

<center>--- *Deficiencies* ---</center>

<center>MEDA</center>

19:54 They'll be able to record parts, labor and other cost information. And of course, they'll be able to share, you know, pictures, videos, any kind of custom forms, and paperwork, really, any kind of equipment issue reports as well. As do you guys ever need the functionality of customer signing off work in the field?

--- Invoicing ---

MEDA

20:15 Or do you ever want your text to invoice in the field? Or do you strictly want that to go through the office... depends?

MARTY

20:24 Type of customer... how it should work is if I, so customers should be built and collected at time of service... and, or a commercial customer that doesn't have a credit established.

MEDA

20:41 Yep.

MARTY

20:43 Sometimes we'll secure that with, you know, a credit card or something like that.

MEDA

20:47 Got you. Yeah, totally makes sense. Well, all of our system is based off preferences. So if you have, you know, a certain lead technician or a certain customer that you wanna do different things for like that, we can kinda set that up in the beginning to make sure that we, you know, collect the, that information.

--- Customer engagement ---

MEDA

21:08 And then of course, customer communication, you'll be able to share Rich real time updates from the start to finish of each job. So notifications, when your techs are in route, appoint reminders after job reports, with those pictures, videos, you know, paperwork, any kind of detailed summary. And then of course, you'll be able to offer them a portal where they can access all this information on demand. And of course, you know, paying quote, sorry, approving quotes, and paying invoices online. And then lastly, we've got management visibility. So all of your data is going to be centralized into one system. So you only have to look into one place to know what's going on. So if you do have any investigative issues, we'll give you a detailed summary so that you can solve those customer issues.

--- Customer engagement ends ---

MEDA

And we also have an audit log. So if you do have maybe a problem child over there, which we all typically do, you'll be able to uncover those internal process issues pretty quickly as well as you'll get, you know, operational KPI'S margin performance, technician, productivity. All of that. All right. So that's a little background about us. Any questions before we jump in here?

MEDA

22:24 Cool. Awesome. So I'll show you three different views today, the office view, the technician view and then what your customers will see as well. So let's start off here in the office view. We're at our dashboard. This is essentially a high level overview of the different stages of your workflow. So we've got a daily schedule here. We've got over do of jobs without appointments. And there's also another bucket that's jobs without appointments do in the next two weeks. So that just gives you a snapshot of what's upcoming. It looks like right now we don't have any jobs do in the next two weeks, which is why that bucket isn't showing up for us but it's really great for your preventative maintenance jobs.

--- *Recurring maintenance* ---

MEDA

23:06 We're gonna set those kind of as a set it and forget it. And they're gonna populate here quarterly annually, however often that service does come about so that you know, you need to schedule it as well as if you're booking out, you know, two to three weeks in advance.

--- *Recurring maintenance ends* ---

MEDA

23:21 What you can go ahead and do is create the work order and it'll sit in these buckets until you're able to schedule that out. So making sure we just don't miss any jobs and keeping on top of everything and having a snapshot of what's upcoming, as well as jobs that need to be marked complete, and jobs that need to be invoiced.

--- *Tech time tracking* ---

MEDA

23:43 As you can see over here, we have our technicians clocking in and out with pins on their location. So we're not tracking their bodies. We're not tracking their trucks. We're tracking when they clock in and out of jobs just to make sure, you know, a little check on them and kind of accurate labor cost.

--- *Quote templates* ---

MEDA

24:04 So I did set us up a preventative maintenance job. I have a description my asset to service and this can completely be customized over here. So if we need to meet, maybe if it's an install job, it's a longer one. We might keep this open for a little bit longer to any parts and items for this job.

MEDA

24:25 We're gonna show up. And if we know ahead of time that we're you know, we need to order this part, how we're gonna log that, and whether we, you know, have this part like I have my widget here who has my pricing rules already set up based on the inventory that we grab from you guys or maybe it's just a complete new part.

MEDA

24:45 So it's a filter that we don't have 12 by let's see. 24, we do have that. There we go. Okay. So, or it's just a random part that you guys haven't ever ordered. We can put in our pricing, select our source. So we'll put in all your parts vendor information. You'll be able to select the vendor that you ordered from, put in your purchase order number and let's say we've ordered this. It's gonna be in on Monday. So we know that when that part comes in, all I have to do is come up here to my search bar, put in my po number, and this work order is gonna show up. And you'll also be able to pull reports on, you know, what's been ordered, what's been received, maybe a half received shipment, things like that?

MARTY

25:33 That kinda makes sense. The.

MEDA

25:37 Comes from our parts vendor. That gives us a purchase order.

MARTY

25:42 So, you're saying it was previously generated the po number?

MEDA

25:47 Correct. We don't cut POS.

MARTY

25:51 So you integrate with Quickbooks though, right? Correct? So our POS cut out of Quickbooks then?

MEDA

26:00 Yep, absolutely.

MARTY

26:02 Okay. All right. So.

MEDA

26:07 Save that.

MARTY

26:11 You don't do any kind of inventory then either then?

MEDA

26:14 So, we do have an add on product called partsledger. Now, what kind of inventory needs are we trying to fill?

MARTY

26:26 Well, I mean, we have inventory at the shop and then every vehicle has a separate inventory location as well.

MEDA

26:35 Okay. But no, like large multiple warehouses.

MARTY

26:42 Just one warehouse.

MEDA

26:44 Okay. So we're all looking for something that you can order from and track that order and all of that stuff... and cut from there.

MARTY

26:57 Cause most of the softwares we demoed have had that capability like the other one we're looking at a service tight, and you're probably familiar with that one.

MEDA

27:08 Yep. Yeah. So what we do inventory is based off consumption in our core functionality products. So you would just say you use this part on this job and you pull in a spreadsheet and kind of pull that report to see what we have left in our inventory. If that is not what you guys are looking for, then you guys would be looking at partsledger. I will say partsledger is really for folks who have tin warehouses, a ton of inventory needs and very specific inventory needs. And it's also a 10,000 dollar add on products almost.

--- Invoicing ---

MARTY

27:55 Okay. Yeah. I mean, we don't you know, it would be cool to get to the point where we have like a legit inventory where, you know, stuff is maybe scanned in and out and that sort of thing. But I mean, we're not at that point but, you know, but it seems like most of these, the only thing you know, with the integration with

Quickbooks is almost everything is done in the software. The only thing that's really done in Quickbooks is like payroll and accounts payable?

MEDA

28:27 Correct. Yep. Everything would start and end kind of in your service module, whether that's you know, service trade, service, tighten, whatever. And then the rest of it would be pushed to Quickbooks. After, you know, invoice.

MARTY

28:45 Yeah. So like accounts receivable collections, date men, is that done in this software or is that done out of Quickbooks?

MEDA

28:54 Yeah, you can invoice through the software, plug payment through the software, and then all those details will push to your Quickbooks after that.

MARTY

29:04 So, what are our statements done out of Quickbooks?

MEDA

29:08 What do you mean by statements?

MARTY

29:11 Monthly statements to customers, for money? They all send invoices. Accounts receivable?

MEDA

29:18 You could do that through here. We have, and so we have a invoice spot where you can search for your invoice, opportunities. Hold on. Let me just leave this real quick where you can.

MARTY

29:34 We send out statements. We send out statements once a month to our customers with, you know, so they have their open balances, a lot of them in the office state.

MEDA

29:43 Yeah. So what you can do is pull a report of all those customers. You, I mean, you can pull it by certain locations or whatnot, and let's just do I'm just gonna do all invoices unpaid or partially paid, fully paid. So, what you would do is run this report. These are all my customers who haven't paid, hit this toggle and send it all back out to them to pay. And that's kind of like what they owe you guys?

MARTY

30:13 Okay.

MEDA

30:14 And you can search from a certain date range, certain customers, you can search by all these things?

--- *Forms* ---

MEDA

30:27 Do you guys have any kind of custom paperwork... like check off lists, things like that or maybe even customer paperwork that they need you guys to fill out on the job, something like that?

MARTY

30:45 Yeah, we have a few different forms we use.

MEDA

30:48 Okay. So what we would do is attach those to whether that's you know, a location form or a certain kind of job that needs that form filled out and they would show up here.

--- *Assets* ---

MEDA

31:00 And what that would be is your technician would be able to kinda write down anything that they needed. Check off the list, whatnot it's show up in the mobile app as well as any kind of comment. So gate code, building map, things like that can be held in here. Something that's really great is our asset management now, I'll just use this H back unit as an example since that's when we're running today. So the office and the technicians both have a access to this a little bit different functionality on each and I'll point that out but they'll both have asset details here here's. Our active service that we're doing to this unit here's. All the jobs that we've ever done on this unit. Now, the biggest difference will be the technician will not have invoice details in the field. It'll strictly be what was done at the location, what was fixed, what was broken, et cetera.

--- *Deficiencies* ---

MEDA

31:59 You can even filter these jobs if you need to. And then we have deficiencies which are repairs that we've done in here, which this just makes the repair and replace conversation really easy when you can and search and see how many times we've had let's say a broken compressor. And so at this point, we might wanna, you know, replace versus repair this time, but the technician and the office staff will have that on hand. So if we did need to kinda let the customer know while we're quoting, this will pull up for them as well as the technician in the field... then of course, any previous quotes that we've had for this one asset, any attachments?

MEDA

32:41 Any comments down here as well? So how does this compare to the asset history that you guys have? Now? Just see that this could be really helpful for your text in the field or even when the office is quoting?

MARTY

32:55 Yeah, it's you know, a little more comprehensive. I would say like the way we have it now is just the equipment attached to the customer?

MARTY

33:11 It's not, you know, there's no interface like, I mean, I guess it's not really attached to the equipment. Like as far as the quotes and all that the quotes are attached to the customer, not the asset. But that makes...

MEDA

33:26 Okay, got.

MARTY

33:26 Just a little more simple, you know, it's an older product, so, you know, and none of our technicians can see it. Anyway. I'm the only person.

MEDA

33:37 So they having a call back to the office to get that history up... building a lot of calls from that.

MARTY

33:48 Well, we're not running mobile software yet?

MEDA

33:50 Yeah, yeah, yeah, absolutely. Are you cool. Any questions here on our work order before we move onto the technician side of things?

MEDA

34:05 We're good. Okay. Let's move over to the mobile app. Give me a second.

MARTY

34:26 How long has service trade been around?

MEDA

34:29 A little bit over 11 years. We just celebrated our anniversary, the summer.

MARTY

34:38 You're on the east coast?

MEDA

34:40 I am, yep. I'm in your favorite place, North Carolina, and I promise, I'm not the same as your implementation person from North Carolina. He's given us a bad name that's for sure.

MARTY

34:58 He had a great mustache though.

MEDA

35:01 Hi guys.

MARTY

35:02 Great beard. Genetic see how that going for.

MEDA

35:06 That's solid that's hopefully that will get him far because I don't know if his support is getting him very far. Your tech. Sorry, I did not mean to rag on him like that.

--- Access to information ---

MEDA

35:18 So your text will log in to actually log into their mobile app. They'll see the jobs that they need to perform for the day. I just have one on my app right now, but they'll be able to click in there and they'll be able to clock in on site.

--- Tech time tracking ---

MEDA

35:35 They can also if you guys want to track drive time and it'll be logged differently as regular time too. So if you guys pay a little bit differently for drive time versus on site time, we can handle that. You can also notify the customer of your eta right through here.

--- Dispatch ---

35:50 So I'm gonna go ahead and clock in. And this is the activity that we're seeing on that homepage dashboard that I just showed you guys just to pin on my location time date stands... cool. So as a technician, all I've gotta do is go into my services and see what I need to perform for the day.

--- Forms ---

MEDA

36:12 So we've got a general description of what needs to be done. If there's any kind of paperwork that will be shown here and what our software does. It pulls in the customer data, the location data, asset data, all that Jazz. And all the technician has to do is either, you know, knock off the check marks, write a little blurb at the bottom, you know, whatever your paperwork requires of them and that will be shown in here for them to do digitally.

--- Assets ---

MEDA

36:38 And it'll automatically be attached to this work order once it's been filled. So that'll be held here, they'll be a number one if they need that. We've got location contacts if needed. We've got comments here. So if the technician needs to leave a comment or if we have a stagnant comment like gate code, building map, things like, that will all be held there... any kind of job items.

--- Quote templates ---

MEDA

37:03 So here's our typical job items that come on this preventative maintenance. If we need to add anything else, what's showing down here is your inventory that we gather from you guys. And this already has the pricing roles, you know, mark up rules, things like that and there.

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

MEDA

37:19 So they'll just click the plus button and add that item. Now if it's something that's not in your inventory, maybe they're going to home depot or whatever to pick up that part. They come up here to other item and they just put in those details. And it automatically logs that tech. Use that part and they can go ahead and, you know, attach a receipt or something like that.

--- Assets ---

MEDA

37:50 All right. Then we've got all of our asset details down here. So if you're servicing multiple units, all the units will show up here. But of course, you'll be able to click in

here, get all the details down here about, you know, whatever you need to and don't laugh because I did make all these up as well as, you know, we've got service history in here.

--- *Deficiencies* ---

MEDA

38:17 We've got a deficiency record any kind of comments you guys have on this asset or you can create tags as well. Do you guys do a lot of pool through work? So in terms of going out for preventative maintenance, maybe identifying other repair needs, logging those, quoting those out, things like that?

--- *Deficiencies ends* ---

MEDA

38:44 Good. I hope so. All right. Yeah, exactly. Exactly. I mean, some folks don't and it's kinda crazy to me because they're leaving a shit ton of money on the table. So how are you?

MARTY

39:00 I was just gonna say we're not making a lot of money doing maintenance man, service and installs, you know?

--- *Type of work* ---

MEDA

39:08 Yeah, but you can get a little bit more out of them because you are, you for preventative maintenance. You're not making a whole lot out of that. But if you identify a huge risk for repair, I mean that repair could be a 1,000 or, you know, a replacement or whatever could be a little bit more than that maintenance. So it's just kind of attack on.

--- *Deficiencies* ---

MARTY

39:27 Yep.

MEDA

39:28 So whether we were able to fix it right there in the field or we need to go back out because we've got a part on order, we would log it through deficiencies right here. All my previous repairs are showing up but I'm gonna come down here to add deficiency. And that's how I'm gonna log it. So add deficiency. I don't have to have a ton of description because of brown compressor nice. Because what I'm able to do is add photos, videos, voice memos, as many as you want in there. So let's take a photo... add that attachment if I needed to, right? Maybe a before and after down here. I can... maybe I wanna take another photo once I fixed it instead after. So I can add as many as I want in there, save that. We're gonna mark the severity whether it's

an operable deficient or just a suggested repair. So let's say an operable, we're gonna tie it back to that asset. Because again we want that clean clear asset history and then our status. So if you're able to fix it right there, we'd say fixed and the office will be notified to just go ahead and invoice. If it's a new repair, we've got to go back out or we've got a quote this out to get approval. We'd say new and our proposed solution is to order, you know, part XYZ or whatever your solution is. Hopefully they give you a better solution than I did. So it's that simple, we save that and the office is already getting notified that happens. And I didn't have to trigger that to go out to my office just by hitting save that's being sent to my office right now.

--- Deficiencies ends ---

MEDA

41:16 So you guys can go ahead and knock out that quote. Now for those one offs where you do need signatures or to generate an invoice, it would come through here. And again, we can set this to where maybe only certain text can do this or how however you want to set that up.

--- Access to information ---

MEDA

41:36 But that's pretty much the mobile app. Do you guys have any questions? Anything that you guys want to dive into a little bit more?

MARTY

41:44 In regards to mobile, yeah... they give them access to what they need.

MEDA

41:54 Yep. Is this what you guys were looking for?

MARTY

41:58 Yeah. I mean, it seems pretty comparable to... you know, most mobile apps far as what you can do.

MEDA

42:11 Cool. All right. So we're gonna go ahead and clock out on the job. I can mark that. I'm taking a breaker if I'm just completely done with the appointment. Let's say I'm done with the appointment. Now, something that's...

MARTY

42:24 Little bit.

MEDA

42:24 Different. Yup.

MARTY

42:27 Sorry, I didn't think I have a question in regards to the mobile app, as far as logging time in, does it send that time to, the time sheet, functioning Quickbooks from your software or is that not a capability?

--- *Invoicing* ---

MEDA

42:42 So what it's gonna do is gonna log that time on the job. And then you'll also have a report whether you wanna pull that weekly monthly or whatever of that time as well. And so all these details will push into your Quickbooks. I need to confirm whether it pushes into the payroll functionality on Quickbooks automatically. So let me double check on that before I give you a wrong answer.

--- *Paper process* ---

MARTY

43:14 Okay.

MEDA

43:15 Cool. So, something that's a little bit different with our software than others is that we give our text digital handcuffs. We love our technicians at the end of the day, but sometimes they come back with not all the right information or not all the information. And then we have to send someone back out and we're wasting time and money by doing that or you guys just don't have enough details.

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

MEDA

43:38 So what we can do is just give them digital handcuffs and you can require certain things of them to do. So, as you can see here, my company is requiring me to attach two photos and I only attached one. They also required me to leave a comment and I didn't leave one at all.

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

MEDA

43:56 So I can't clock out and go do the rest of my jobs until I do what my office is requiring me of. So I need to take a second photo.

MARTY

44:11 Have you got a digital handcuff or, is that like the same?

MEDA

44:17 No, I'm pretty sure I'm the only one that uses that. I just think it paints a good picture.

--- Tech On-site ---

MARTY

44:24 Yeah, you like it? Yeah, I do.

MEDA

44:29 Good, good. Alright. So I left a comment I've attached to photo. And now I can block out. All right... cool. So we're gonna move back to the office side of things. They're gonna get an e-mail notifying them of what went down and what location really the meat and potatoes is right here in this link.

--- Deficiencies ---

MEDA

44:54 So we're gonna click that link. It's gonna bring us back into the office side of things and what this is. It's just a record within our original work order. So it's a record within a record. So we've got that repair record right there. Again, this is what I was talking about right before we're about to build out this quote. We're gonna give you guys a lot of information. So any related repairs are gonna pull up... as well as, you know, if we quote in the field, it would show up there. If our technician left any comments on this repair, it would be shown there. And of course, our attachment.

--- Quote templates ---

MEDA

45:33 So our photo of our repair. So let's go ahead and create a quote for this. Now for your customers, do you guys have like a standard PM contract that you use across the board with pricing rules or do you have multiple contracts for, you know, your different customers?

--- ST app contracts and pricing ---

MARTY

45:57 It's pretty standard. We just kinda made one up in excel and a spreadsheet format. And okay, now we have like a tab for equipment, a tab for tasks, and a price tab as.

MEDA

46:12 Okay. Cool. So we can host different contracts in here. I'll show you what our contract page looks like.

--- Quote templates ---

MEDA

46:21 But when you're scheduling a service or even setting up a customer, you can attach a certain kind of contracts for them. But let's fill out our quote real quick. So what I suggest is using quote templates, you don't have to use them. But for jobs that you guys are doing pretty repetitively, it's really easy just to add a template there. So you can just come in here and knock out your quote real quick, maybe adjust anything that you need to hopefully you're not writing gibberish like me. And then, you can have typical line items and things that are associated with that. So we've got our quote description build out.

--- Deficiencies ---

MEDA

47:00 We've got our services, our repair record, parts and labor all down here. And of course, our attachment. So let's go ahead and quote this out and send it to the customer. You can send it to who, what, whoever knock off your voice memos, because we definitely don't want to send any voice memos with our text like dropping the F bomb or something or if it's an appropriate voice memo, of course, attach it.

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

MEDA

47:25 But you can kinda pick and choose what you're attaching and then let's view this full screen. So we were really sending this to a customer and have a big approved button and a big request changes button over here. What's not customizable on this quote would be your logo up here, your quote number, and these to and from details.

--- Quote templates ---

MEDA

47:46 So of course, this would be you guys up here. What is customizable is, of course, this full description down here. And if you want to include details of the service, you could as well as the pricing. So if you wanted this to be laid out line items, prices, brand total.

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

MEDA

48:05 However you want this to look completely customizable. And then of course, any kind of files and photos and comments you wanna send in terms and conditions at the bottom? Does it seem like it's...

MARTY

48:19 Easier.

MEDA

48:20 To build that?

MARTY

48:22 So you generate all quotes from this feature for maintenance, Installation, service, repairs, they all get done from here?

--- Recurring maintenance ---

MEDA

48:34 Correct. Yep.

MARTY

48:37 So there's not like a separate module for maintenance or like assign a contract number to a maintenance agreement or anything like that, right?

MEDA

48:50 No, I mean.

MARTY

48:53 There's not a.

MEDA

48:55 No, no, no, no. So when you schedule jobs, you'll determine what kind of job it is, whether it's an emergency call, a preventative maintenance call and install, whatnot, you'll determine what kind of call that is. So you can kinda divvy out those and separate those. But no, it, it'd be all the same workflow.

--- Quoting ---

MARTY

49:21 Okay.

MEDA

49:23 Cool. So we'll go ahead and approve this quo, of course, you're they can approve it online. Now, we could do one or two things right here. We are done with our preventative maintenance job. We've knocked that out so we could go ahead and invoice for that, but we have this repair that we need to go back out and do.

--- Tech On-site ---

MEDA

49:46 So you might as well invoice all at one time, so that's kind of what I'm doing right now. So what I'm doing is I added this same original work order that we were doing. I just scheduled and I have an extra one on here that's lingering. I just added this repair to the original work order that we did so that we can invoice all at one time.

MEDA

50:18 So you could have invoiced for the permitted maintenance and then invoice again for this repair. It'd be kinda silly to do that, but you can see right here that we can have multiple appointments open and do Progress billing and things like that. Now here's our project management features over here. And this is what I was talking about. It's lightweight so we can set a budget with change orders, etcetera. You know, you have your estimated margin, your total value, all that Jazz up here. But this is kinda what I was talking about. You wouldn't be able to handle like a really long term Construction project on this.

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

MEDA

50:58 You could, you probably don't want to though because it's not going to have all the features that you want. But is this good enough for now for kind of project management? Or are you guys looking for something more robust?

MARTY

51:13 Yeah, no, something probably a little more. This is pretty simple. Yeah.

--- Recurring maintenance ---

MEDA

51:18 Exactly.

MARTY

51:19 And in regards to back up a second on the maintenance billing, is there typically we, do we Bill our maintenance, you know, before doing service, it's pretty paid. Okay. So every month, we Bill for the next month maintenance, whether it's quarterly, semi, annual, whatever the type of inspection is.

--- ST app contracts and pricing ---

MEDA

51:45 Yeah, we could do that. And then you would just...

MARTY

51:47 That we'd have to do it individually, right? Say, hey... Bill all December inspections, November first?

MEDA

52:02 Let me, that's a good question. Give me a second. Let me see if that can be held in contracts. So here are here's like a contract that I have a PM contract. It has item

price list with mark up rules, contract rules. This is what I was looking at.

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

MEDA

52:36 I don't know. I think you would have to do it manually.

MARTY

52:42 Okay.

MEDA

52:42 Now that I'm looking at these... no, that's not what I wanted. Yeah, I think you would have to invoice that. And then on your job page, put a negative number that, that's been paid. So to take it out of the total, you guys don't even add maintenance to the total.

--- Tech time tracking ---

MEDA

53:04 I guess then I would just run that as a second, a separate job even though it's not like a true real job. I would run it as a job and just like invoice through that and just have it as paid.

MARTY

53:22 You could still attach labor materials to?

MEDA

53:26 Correct. Yeah, that's all I would probably suggest doing it.

--- Access to information ---

MARTY

53:33 Okay. Is this software cloud based or does it sit on a file server in our office?

MEDA

53:39 Cloud based?

MEDA

53:47 All right. So, let's go back to this job real quick. Let's magically complete this job and go ahead and create an invoice.

MEDA

54:03 As soon as my computer loads.

MARTY

54:14 Do you like North Carolina?

MEDA

54:16 I mean, it is the only thing that I know I was born and raised here, but I do love it. I mean, we get the beach and the ocean kinda all in one day. You could go to either. I mean, I like it. We do well. Well, I would say winter, not so much. I can't remember the last time it actually snowed. Let me reload this... and we don't handle snow down here very well. There's a very infamous picture of Raleigh, North Carolina when it snowed and there were cars on fire and it was really funny. So, I mean, it's not funny. No one was hurt.

MARTY

55:02 We call it.

MEDA

55:04 To pack lives. Yeah. So we don't I wouldn't say we get like a true winter, but we like to pretend like we do that's for sure. You guys are, where are you all out of?

MARTY

55:19 Yeah, where?

MEDA

55:21 I bet.

MARTY

55:23 Southern Arizona, too, fine.

MEDA

55:26 Fun. Nice.

MARTY

55:28 Were like, you know, the exact opposite. We're over an hour away from Mexico.

MEDA

55:36 Nice. You guys go to Mexico on the weekend, get a little partying in?

MARTY

55:42 I'm not into Mexico.

MEDA

55:44 Okay. Sorry.

MARTY

55:47 I mean, I went there earlier this year and got really sick.

MEDA

55:53 That's not good. You know, we actually went to Mexico and we, I didn't get montazuma as revenge, but my fiance did and it was rough. We got it or he got it on the flight back. So, it was a really fun travel day for sure.

MARTY

56:12 Yeah. I mean, usually, it's you know, not horrible, but I can tell you it was, you know, quite possibly the sickest I've been in my life, it was, so I'm sorry about that.

MEDA

56:29 Yeah, I was, I.

MARTY

56:33 Actually, yeah.

MEDA

56:37 Do you have a travel, a choice place that you like to go? Or are you just not a big traveler?

MARTY

56:43 I like traveling... vegas. It's been the vegas. I love the ocean. I love the ocean, the water. I like San Diego. I like Hawaii a lot.

MEDA

57:01 Yep. Yeah. Well, I was gonna suggest North Carolina beaches, but I don't think we really compare to Hawaii beaches, but we do have beautiful beaches over here that's for sure.

MARTY

57:13 I've done research in South Carolina as a potential place to live later in life.

MEDA

57:20 A lot of people go down there. They have a really, I mean, the whole entire state really. I don't know if you go off or not huge golfing community, really nice communities out there. I love South Carolina. So, mount pleasant, I have a lot of family in that area as well as tiby, and a couple of other beaches down there. So would definitely suggest if you ever want an insiders information about it, I can definitely let you know some details.

MARTY

57:51 Well, yeah, I've been to Hilton head island and Myrtle beach, and.

MEDA

57:57 That's great, don't. We can't say anything good about Myrtle beach. We can't it's the armpit, it's the armpit of the south, but it's...

MARTY

58:05 Yeah, it's...

MEDA

58:06 All right.

MARTY

58:07 The same great place.

MEDA

58:09 Yeah, yeah. Especially if you go during biker week, it is a wild place.

MARTY

58:17 But I like santa Georgia too.

MEDA

58:20 Yeah... it's gorgeous. You got the water right there too. They've got a nice little, I believe it's like a river front. I can't remember.

MARTY

58:29 Yeah. And they make the leans right on the board like there.

MEDA

58:35 Yeah. It's nice. Yeah, you got, you get a little bit slower life down here. I don't know what it's like over there, but it's definitely slow down here. That's for sure. Yeah, yeah, absolutely cool. So let's build out our invoice real quick.

--- ST app contracts and pricing ---

MEDA

58:50 We've got a contract in play because I have a contract attached to this job that dictates my pricing in markup roles. Now, I don't like that gross margin. So I'm gonna give this a little bit of love in here just not under charge. And then I can dictate the level of detail.

--- Quote templates ---

MEDA

59:12 So if I wanna group this by service or just have a huge long list of items if I, you know, wanna do just a grand total summarized by line item type. However you wanna do that. Let's just show you what it's like with a little bit more detail and you can always add any kind of invoice items down here.

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

MEDA

59:30 Maybe an invoice note. So save those changes that we have. I like that gross margin a little bit more. And then we can put like a net 30 90 60 however often you guys do that. And then let's send the invoice out.

MEDA

59:50 So, we've got our invoice details. I split it up by equipment fees, labor, and other. Again, you can kinda have that look however you want it to. And then your terms and conditions at the bottom... something that's really great for folks, of course they can pay. Now, something that's really great is the service details right here.

--- Tech On-site ---

MEDA

1:00:11 Now, sometimes our folks send this out before the jobs gone off as a heads up on, hey here's, the appointments that we have here's, the services that we're gonna do. So if you were sending it out before the job's gone off, obviously, it wanna be checked off. You can send it during a job as like a Progress check to say, hey, we've done this visit. This is what we've done so far. This is what we have left to do or of course, on an invoice like this when it's completed. So now that it's completed, we can see all of our appointments are checked off. All of our services are checked off my parts and labor in items again only quantity never pricing in here. Any kind of comments will be held here. Any attachments and any deficiency, the repairs?

--- Type of work ---

MEDA

1:01:07 Yep. That's kind of service trade as a whole. Now that we've shown you this, you know, based on what you've mentioned earlier, I believe this would be best for your service department. Not for the, you know, Construction side. They probably have more needs, would you agree?

MARTY

1:01:28 Yeah, definitely lacking in Construction.

MEDA

1:01:32 Yeah. It's just not something we'll ever do.

MARTY

1:01:37 Yeah, but even the service side seems to be missing a few pieces... you know, like, with Maine and stuff like that, but in general, it's yeah, it looks like it'd work for service.

MEDA

1:01:51 What pieces are we missing for maintenance? Just?

--- Recurring maintenance ---

MARTY

1:01:57 Just like the whole maintenance management aspect of it in regards, to billing ahead of time, and then kind of, you know, almost having a separate module for maintenance where, you know, we could have all of our maintenance contracts entered in for each maintenance customer to not only Bill ahead of time based off that inspection schedule, but to also order materials like, you know, filters belts, et cetera, for each inspection... ahead of time as well.

--- Invoicing ---

MARTY

1:02:45 You know, through a purchasing function, yeah the top to that module that also allows batch generation, batch, billing, batch, work orders. You don't do them all individual.

MEDA

1:03:00 No, you can definitely batch billings, work orders and all of that as well and invoicing. So, in order to batch opportunities, we come over here to service opportunities.

--- Recurring maintenance ---

MEDA

1:03:16 Look at, let's just say let's do next month, approve services, search... hit this and batch schedule and create all these jobs.

MARTY

1:03:31 Okay. So if you set up this account as a job?

MEDA

1:03:37 And then in terms of service contracts here are all of your service contracts here. So you can have as many as you want in here and then specify certain kinds of details and attach them to different kinds of companies or jobs.

--- ST app contracts and pricing ---

MEDA

1:03:55 So you can have these automatically a pull into jobs. So item prices, contract roles with payment terms, minimum charges, admin charges, you know, whatever markup cross markup roles across the board specific invoice notes specific, you know, all of your invoices are tied to here. Any kind of child contracts, things like that?

MEDA

1:04:30 So, these can be automatically.

MARTY

1:04:34 You have the ability to do like Aia billing formats?

MEDA

1:04:41 Billing time and materials?

MARTY

1:04:46 Okay. And, any flat rate?

MEDA

1:04:52 No.

MARTY

1:04:54 Okay. Yeah. I mean, we don't really... do much of that or really any of that anymore, but we use. All right.

MEDA

1:05:05 Yeah. So I mean, we can do Progress billing things like that.

--- *Type of work* ---

MEDA

1:05:11 And again, it's just gonna be that lightweight project management that you're seeing. So it's not gonna be something that I would really ever recommend for a Construction job or even a job that's longer than like six months.

MARTY

1:05:27 Yeah, for sure. I.

MEDA

1:05:32 To be honest guys, I think this would really work for your service side, but I also think you guys want something for the install for the Construction team as well. Am I wrong on that?

--- *Pricing* ---

MARTY

1:05:47 No, I mean, in a perfect. Well, yeah, that would be the best case scenario you talk about, you know, getting a separate thing with someone like pro core super expensive.

MEDA

1:05:58 Yeah.

MARTY

1:06:00 You know, so you just driving up your cost, you know, these cloud based systems are quite expensive. I don't know if you handle pricing, but roughly what do you guys charge per user a month? Just?

--- ST app contracts and pricing ---

MEDA

1:06:15 Yeah. So we have a different, let me show you our different kinds of pricing breakdowns. So, we have a select premium and enterprise package if you guys needed some kind of service portal, which is that thing on your website that I was mentioning where folks could request work or view previous work that you've done for them as well as those project management features that we talked about, budget whip, change order, Progress, billing, things like that. You would be up to premium. And here is a monthly pricing per tech.

--- Pricing ---

MARTY

1:06:54 Okay. And it's just monthly or, do you?

MEDA

1:07:00 No, we Bill upfront. Yeah, we do a year long contract.

MARTY

1:07:07 Okay. So you like to get a whole year paid upfront?

MEDA

1:07:11 Correct.

MARTY

1:07:16 All right.

MEDA

1:07:18 Cool. So.

MARTY

1:07:24 Yeah. I mean, like we've already mentioned that I would like the ability to at least have the ability, to do a little bit more on the Construction side in regards to like a pay apps and a little bit more... for... and that budget, what you guys have call a budget feature on the project management side to be able to create some cost codes and then, you know, add some costs, and labor per cost code or phase of Construction, a little bit more capability there.

--- ST app contracts and pricing ---

MARTY

1:08:08 We don't need like a full module, but yeah, I think it's a little too light for us if you will. But.

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

MEDA

1:08:19 No. And I agree with you guys doing more Construction than not. Let me take your question to our solutions architects team, see if, they know something that I don't which hopefully they do and maybe see if there's a workaround or ways to do that within the software. Yeah, I'll double check with you guys or with them for that and kinda get back to you all on how we can do that.

MARTY

1:08:51 Okay. Cool. Sounds good.

MEDA

1:08:54 Awesome. Well, I appreciate you guys. I will reach out to them, probably gonna get an answer by the end of the day, if not early tomorrow. So what time looks good for us to get back together, answer questions and kinda see what our next steps are?

--- Purchase decision ---

MARTY

1:09:17 Just reach out to Sean on e-mail after you get those questions answered, and then we'll just go from there.

MEDA

1:09:23 Okay. I'm assuming if the answers are no, that this is a no go.

MARTY

1:09:30 Yeah, pretty much.

MEDA

1:09:32 No. And I appreciate the honesty and I would have to totally agree.

--- Purchase decision ends ---

MEDA

1:09:37 I really would recommend looking at pro core. I understand it's super expensive, but it really will have most of everything that you need. But yeah, I'll get you these answers and kinda touch base with you, Shawn, and see where we're gonna go from there. Okay. Sounds good. All right. I appreciate it. You'll have a great rest of your day.

MARTY

1:10:01 Thank you too. Bye bye.

MEDA

1:10:02 Thanks bye.

The End