ServiceTrade Review

Logan Engel with Texas Chiller Systems
Recorded on 12/20/23 via Zoom, 33 min.

Participants

SERVICETRADE

Logan Engel
Account Manager

TEXAS CHILLER SYSTEMS

Brandon Clark
(NEW) Director of Sales

OTHER

17706330383

Sjohnson

Alex.Taylor

Topics

Transcript

--- *Call Setup* ---

BRANDON

0:00 You hear me?

LOGAN

0:01 Now, I can, hey, how are you?

BRANDON

0:03 I'm doing good. Hey, I'm trying to evolve another employee here.

LOGAN

0:08 Yeah. Okay. I just let them in from the phone.

BRANDON

0:13 Yeah. She was trying to log in via computer. I think, right? China. Yes. And, and you're still having issues with a link?

17706330383

0:25 Let me...

LOGAN

0:29 I'm sorry, say it.

BRANDON

0:33 Same, can you repeat that?

17706330383

0:36 I'm I am trying to log in. I've actually got to the launch meeting screen.

BRANDON

0:41 Okay. So you?

17706330383

0:44 Download icon?

BRANDON

0:49 Yeah, mine had some Zoom updates that took me through so that's probably what's going on with yours?

17706330383

0:58 No.

17706330383

1:17 I think we're in business?

LOGAN

1:18 There we go. Yeah, I just omitted you, so it should connect now.

17706330383

1:25 I'm in.

LOGAN

1:26 Cool. What you'll want. Do you have audio on your computer?

17706330383

1:31 I do not. So.

LOGAN

1:33 Perfect. Okay. I didn't want there to be an echo, but that works out perfectly. So, anyways, well, thank you all for joining today. How can I help you?

--- *Call Setup ends* ---

BRANDON

1:42 Well, so I'm the new director of sales for Texas chiller systems. I've moved in from sales. I have some experience as a user, not as an admin and China, is a brand new company. She's been here less than 24 hours and she's here to help us with our processes internally. And so, I wanted her to be a part of this call to hear some of the things that I want to go over with you that I can improve my own knowledge on and then learn a few things. So we really aren't as a group utilizing the tool for much more than just opportunity tracking. So I've got to go in and we want to start using it as an estimating tool, but I've gotta make some adjustments to cost to make them more in line with what's actual because they're inaccurate as they are right now... and a few of the other things I wanted to learn how to, if I can adjust the probability of closure like the... we can, I know you can add in the percentage there, but like the stage of the opportunity, can we rename those stages to better defined?

LOGAN

3:17 Yeah. So you're referring to the account management team, we don't have demo accounts, so I...

BRANDON

3:28 What?

LOGAN

3:29 Boundary for you, but are you referring to like the color coded section?

BRANDON

3:33 I'm referring to like why don't we put it in an opportunity. The stage is either going to be under opportunity, under proposal. Okay?

LOGAN

3:44 Cool. Yeah, we're talking the same language. Let me pull up. I think on our website, I can grab like, a view real quick sales manager.

LOGAN

4:04 Sorry, bear with me all.

BRANDON

4:06 No worries.

LOGAN

4:07 For the, for being patient, I appreciate it. You know what I have?

BRANDON

4:15 That four?

LOGAN

4:48 I think I have it anyways. I've definitely seen what I think you're referring to. I just don't know if I can find like a grab a screen grab from it.

17706330383

5:02 Hey, Logan. Go to and Brandon, I think I may have found what you're looking for, go to the support, the new support training link and look under opportunities because there's a managing opportunity types and opportunity groups. And then there's opportunity stages... with some graphic icon.

BRANDON

5:28 Screen.

--- *Call Setup* ---

BRANDON

5:57 Can I share my screen with you?

LOGAN

5:59 Yes, yes, for sure. Okay. I finally found a screen graph. But if you share screen that's totally fine. There.

BRANDON

6:14 You, see the screen here?

LOGAN

6:17 Gotcha. Yep.

BRANDON

6:19 Okay. So... my internet is really slow just gonna go ahead so I can make a new one here for example. So right here where it says probability of selling and you have these different categories, do I have the ability to amend these? Edit these? Add? Delete?

LOGAN

6:42 You should, yes, how you do that? I personally don't know but I can definitely get you to someone who can help with that.

BRANDON

6:51 Okay.

LOGAN

6:53 Yeah. Let me actually real quick center on the call. Let me send them a message and see if they're in a meeting. If not, I'll see if they can hop right on this call.

BRANDON

7:04 Okay.

LOGAN

7:07 There we go.

LOGAN

7:49 Okay. I sent that message. I'm gonna check his calendar while we're waiting just so I can... see if he is on.

BRANDON

7:56 A call.

LOGAN

8:07 Okay. So it looks like he's free on his calendar. So I'll give him some time to answer. He may be in an internal meeting because I won't have visibility in that aspect, but we'll see here.

BRANDON

8:20 Okay.

LOGAN

8:23 Then...

LOGAN

8:31 I'm gonna message one other person to, just to see if she could.

LOGAN

8:39 Perfect. Alex, just message back and said he can hop on. What I'm gonna do is copy the link and invite him on over real quick.

BRANDON

8:48 Okay.

LOGAN

8:54 Right.

LOGAN

9:23 Okay. He's joining now.

LOGAN

9:31 Hey, Alex.

ALEX.TAYLOR

9:33 Hey, how's it going?

LOGAN

9:34 Good. Thank you so much for joining. I know that was last minute. I have Brandon here. He's the new director of sales at Texas chillers. Yeah. And seeing how do you pronounce your name? I'm so sorry, is it? Sorry, you cut out there?

--- Call Setup ends ---

17706330383

9:52 China?

LOGAN

9:54 China. I'm gonna get that. I promise, I have Sheena here as well. She's brand new like, as in within the last 24 hours. Okay. Gotcha. Currently, they are using Northboundary minimally I would say just for opportunity tracking, but they want to start using it for estimating. So what Brandon is going to work on is updating cost to be more accurate. And he had a question around renaming the stage for, was it under probability of selling Brandon? Was that the, yeah. So in that drop down, is there a way for them to rename each stage and Brandon, if you could click on that, just so that drops down to show what you currently have... perfect.

ALEX.TAYLOR

10:44 So that is a good question. So let me hop into your tenant. Now in Northboundary, there are things called custom fields. So we have them for opportunities, customers and contacts. I think that might be a custom fields. We might be able to change that, but let me sign into your tenant real quick and I can double check that.

--- Small Talk ---

BRANDON

11:01 Okay.

ALEX.TAYLOR

11:02 And it's gonna take just a second. Sorry, we, I don't know if you all saw the switch over to SSO. So now it's like an extra step in signing in. So it's gonna take just a second. And there is.

LOGAN

11:20 What part of Texas are you all based out of?

BRANDON

11:24 San Antonio?

LOGAN

11:26 Nice. Okay. I used to live in Austin for three years. I've been down to San Antonio several times.

BRANDON

11:32 Yeah. I just moved back from Austin. I've been in Austin the last six years.

LOGAN

11:37 Nice. Okay. Yeah, I used to work at their corporate apples, corporate office up, okay?

BRANDON

How you go with that?

LOGAN

Golly, that was, I would say five, about five or six years ago now.

BRANDON

Yeah. I mean, it's a voice since then.

LOGAN

Yeah. I flew back with my girlfriend in April because she had never been to Austin?

BRANDON

Yeah.

LOGAN

I just absolutely love it but it kinda breaks my heart how much it's changing, which is to be expected but.

BRANDON

Yeah, for sure.

LOGAN

I miss how it used to be.

BRANDON

Yeah, it's a great place to visit though.

LOGAN

Yeah. We're going back in March for her sister's wedding down in Houston and some time in Austin while I'm there, so.

BRANDON

That's good.

LOGAN

Yeah. But you'll I've been down to San Antonio, you'll have what is that place called? There's? Also one in New Orleans and I used to live there, so that's why I would go down to San Antonio. You can get the hurricane drinks. I even have a glass... yes, yes, pad over in.

BRANDON

_{12:45} Yeah. So if you have enough hurricane drinks, you forget what the name of the bar is.

LOGAN

_{12:51} Yeah.

ALEX.TAYLOR

_{12:54} So I did find the section. So if you, so if you can close out of there real quick, and then what we're gonna do is open up a separate tab for the setting section. So if you go ahead and click on close... and then what I want you to do is, right, click on that and that works too. So then if you go under opportunities actually. Yep. Okay. So you got that. So look for the probability... yep right there. So there you can change the names of them, change the percentages. I think if you click cancel, you'll be able to add new ones as well as new percentages as well.

BRANDON

_{13:32} Okay. So I can just put one here and then save. Okay, perfect. That answers that question. I've got a few more... and this, these are pretty much most of these are related to tracking categoriesi. Mean tracking opportunities. So... one of the things that I would also like to know is can I control which of these are mandatory?

ALEX.TAYLOR

_{14:10} So for the custom fields, you can, for the default fields. Unfortunately, we can't control which ones are required or not. And actually you don't have any custom fields for your opportunities. So if you wanted to add any additional custom fields and mark them as required, that would be an option as well. But out of those ones you have there, unfortunately, we can't modify that.

BRANDON

_{14:33} So adding custom fields that's something that I wouldn't have to go to service trade and have you guys do that?

ALEX.TAYLOR

_{14:39} No, that's actually something that we could actually take a look at right now. So if you close out of here and then go back into the setup menu... and then back under opportunities. And also, I like that you're using the left hand menu because everything in the center is, it's a little bit of a mess. So if you click on opportunity custom fields, it'll be closer to the bottom. Yeah. Perfect. So what we have here is the first four are plain text. The next four are drop Downs, and then the bottom two or a date field. And then a number field. And the way that we can set these up is, you know, you've got your label text like what is the field called? If you want to help message there, it will have like a little pop up on the side that will bring up the message. If you want that to link out to something. So say, if someone needs to refer to something, you've got a site that you want them to go to, it will open that up in a separate page. And then that checkbox required will actually turn that toggle on and off. But this is only for custom fields.

BRANDON

15:38 Okay. All right. And then we have dollar amount here, tracking like I wanted to track like man hours... if, which one of these would I use, to put in man hours and then be able to plug in 800 is a, as a number?

ALEX.TAYLOR

16:04 I'd maybe suggest one of the plain text fields up at the top because I think the tenth one that's primarily used for currency. Okay?

BRANDON

16:12 So these would just give them the opportunity, I can label it and then they have the opportunity just enter any plain text into that. Okay, perfect. You're doing a great job and answer my questions. Thank you. So... really only have one more. And this is related to using utilizing this tool for estimating purposes. And I apologize because I know that... the previous sales manager had had gone through this in great detail. But... and forgive me, I don't have, I can't find my example in here that I have made. I was.

ALEX.TAYLOR

17:06 One thing that throws everybody off is yep, so that organization filter.

17706330383

17:12 Yeah.

ALEX.TAYLOR

17:13 Perfect.

BRANDON

17:14 So in here, for example, and this is something that she is really gonna help us out with, on our processes internally, utilizing this tool for estimating purposes, these item numbers over here, you know, I just plug those in manually, but, we refer those to internally as cost codes that go into another operations side tool that feeds into finance. And so these numbers are very important as we plug these into this estimate sheet and to carry over into. And, and I don't believe that there's any sort of open API between Northboundary and Jonas is the tool that we use. So we're having to just manually enter these cost codes as part of this estimate. But what I don't I haven't figured out and I don't know why it seems like it would be pretty obvious that it would be necessary. Is there's no way to actually print?

LOGAN

18:32 Or...

BRANDON

18:33 Export, this sheet right here, this roll up of parts and pieces unless I'm wrong?

ALEX.TAYLOR

18:42 That is a good question. Actually, I just found your job and let me look at the, so we got this worksheet here.

LOGAN

18:53 Let me pull.

ALEX.TAYLOR

18:55 Let me check some of these reports because you're right? I'm not sure what we can export as a spreadsheet. And especially if you need to load this into another system that does make it kind of a kind of a pain in the butt to actually grab all of that. So if you click on reports, so actually, what kind of format are you looking for? Would it be like a, like an excel format? Would it be just like a PDF?

BRANDON

19:22 Either one excel would be preferred.

ALEX.TAYLOR

19:28 So, if you click on reports, then let's take a look at what we have at least by.

BRANDON

19:34 The left hand side.

ALEX.TAYLOR

19:36 No over on the right hand. So right under where, right under your name, there's a drop down that says reports. Yep, I will say, and just a side note when I was first learning the system, there are a lot of clicks that you don't see.

BRANDON

19:51 All the time. I...

ALEX.TAYLOR

19:53 Have, some standing notes to the product team on moving some stuff around so that's not so.

BRANDON

19:59 Honestly, I've never even noticed that tab up there.

ALEX.TAYLOR

20:03 Yup. So what I want you to do is click each of those check boxes. So these are reports that are specific to this particular project and let's see what would be relevant. Now, the couple of options we have. So for anything in files that would just be anything that's associated with that opportunity. So, that one you wouldn't you

probably wouldn't see in every single project. So the print one that will just open it up as if you're about to print it on the export button, that would export it into a word document. And then the file that opens it up as a PDF. So, I guess, and then we can see what they look like. Try the print one, right? Okay. So we've got the project pricing summary that's just a breakdown of by each of your boxes in this project. You know, what's the cost of it? What's your margin? All that good stuff?

BRANDON

20:55 It does it, this does absolutely what I needed it to be. Okay... because I couldn't figure out why we didn't have this sheet to where we could turn this over to ops and they have this data right here with cost codes.

ALEX.TAYLOR

21:14 Gotcha. So I wonder if, and I've also got the job open on my end if we open that up in word, if that would give us a more editable version. So the very we'll see while you can copy from that table there, if you have it all in one spot that might make it a little easier to copy.

BRANDON

21:30 Okay. So should I go back to print or export to word?

ALEX.TAYLOR

21:37 Try exporting it, the word.

BRANDON

21:38 Okay.

BRANDON

21:54 There we go.

ALEX.TAYLOR

22:12 Yeah. I don't see a way to necessarily export that into excel. But does having that in a word format where you at least have a little bit more edit options with, is that like a step?

BRANDON

22:23 Absolutely. Yeah. I mean, this is just being able to... just export this, you know, in any form or fashion without having to have somebody in ops log in the Northboundary... and manually enter everything in Jonas from what they're looking at on the screen that, this would be a part of a turnover packet.

ALEX.TAYLOR

22:49 Gotcha.

BRANDON

22:50 This, this really has a lot of a lot more horse power than I understood it to have. So, okay... that's really... the gist of what I had at this point. I'm sure as I start getting deeper into this, I might have to reach back out to you guys and Logan, maybe you can tell me. So, when I need some technical assistance, who, who's the right person?

LOGAN

23:21 Yeah, great question. So do you have the support e-mail for Northboundary? If not, okay, I will e-mail that right on over to you. And then as far as me for the time being, if you have any questions around like renewal or adding sales licenses as you expand and grow out your sales team more and more, I'll be your point of contact for that. And I'll put all of that in the e-mail that way, you can always go to that and decipher from there. If if it's ever a topic where you're not sure if it would be me or tech support, reach out to me. In worst case, I'll get you in contact with support.

BRANDON

24:02 Okay. I appreciate it Sheena. How about you? Do you have anything to add or any questions?

17706330383

24:08 I have that questions to ask. Hey, will you send me that export? Because I'm gonna look at that tomorrow, costco and Jonas tomorrow, Alex. This is probably more for you. So as Brandon mentioned at the beginning, I think before you got on, we need to update a bunch of items, prices, burdens, all of that stuff. I know we have the import export, just the sidebar. I launched a service trade. I'm familiar with service trade. Okay. My previous company, I executed and implemented that change over so kinda familiar with how everything looks, but I know we have the ability to export import relatively easily. Can you kinda e-mail us what it looks like? Or is it gonna be better served to get you guys to help us do that? Because from what I've seen, I think some steps were missed on the launch of the implementation on our side. That is making Brandon's life a lot harder.

ALEX.TAYLOR

25:12 Gotcha. So a couple there. So regarding updating the item libraries, we actually, I have an article that I'll send to Logan to include to send you to you at the very least that could be used just to, to, for you all to get some initial information. So, you know, where to go, how to export, stuff, how to update stuff. And then if you have any questions, you'll have the support line. So to reach out to us like, hey, we're trying to do this, need some assistance regarding project pricing that unfortunately cannot. We can't import that, but you can set up multiple labor rates like per projects. I will say between maintenance and projects. Projects is a lot easier. The challenge with maintenance is that, that's pulling from your pricing, your price factors, the asset information and as well as the type of agreement as well. So that's if you're if you want to get started with updating one versus the other, I definitely suggest projects because that's that has a little bit more feedback regarding, you know, you change this, that affects this. But I'll see if there's an article on that as well. And then if you have any questions where you're going about that, you've got the support line. And then if you want us to actively help, that might turn into a TM I thing, but that might be something.

BRANDON

To talk about.

17706330383

Yep. And it honestly may end up being worth that especially when we get into the maintenance component because I don't know we may have one percent of maintenance information set up.

ALEX.TAYLOR

26:38 Gotcha. Okay?

LOGAN

26:39 Real quick then not to cut anybody off China, what's your e-mail just so that I have that and can include you on what I sent to.

17706330383

26:47 Mine is Sheena Johnson at Texas chiller system.

LOGAN

27:00 Perfect. Dot com, I'm assuming.

BRANDON

27:04 Yeah, yes.

LOGAN

27:05 Perfect. Awesome. Thanks. I didn't mean to cut you all off, keep going questions.

17706330383

27:12 Because I don't I mean, it would be great just to totally relaunch it, but I don't want to do that because that's a pain in the butt and a whole lot of work. The other question that I have for you is end of this year, we're targeting to move off of Jonas, which is our current ERP over to a combo BuildOps Sage and tact, we are fairly confident that there are customers that exist in Jonas today that are not in Northboundary. When we get to a point where we can pause and actually look at that, do we have the ability to again create export out of Jonas, compare it to Northboundary? Remove our duplicates. Have a list of clients that don't exist to Northboundary and then upload them into Northboundary. So our systems match one for one. And then moving forward, Northboundary is the driving connector for everything goes in the Northboundary. And then that's what feeds single direction to the rest of the world.

ALEX.TAYLOR

28:25 So I'm not sure I haven't worked with Jonas myself, but in Northboundary, there is a customer import. So, and you can also export all that data as well. So actually her, Brandon, can you go back to the dashboard real quick?

28:51 Or I can also send the documentation on it. But if you're side into the system, if you go under customer management, there is a actually let me pull up on.

17706330383

29:00 All right. I'm there, I'm under customer management.

ALEX.TAYLOR

29:02 Okay, perfect. So then on the far right side, there's a drop down button. So, and that has import customers and then export files. Yep. So what you wanna do is make sure that you've got your filter set for everything just so that you're seeing everything. And then that will be your way to export. It. Now, I will say I have an enhancement request in to update a couple of things. One of those things is that the export headers are a little different than the import headers but that's something to be aware of. And again, as you're when you get to that point, feel free to reach out to support and we can help troubleshoot the import process. You wanna make sure that, you know once you, your list of customers that are not duplicate, the first step is, you know, you load the file. Next step is you review the mapping. Now, there is an import template that is provided under the import side. So you just wanna make sure you load it according to that, check your mapping and then it'll give you a review of the data like, hey, this is where everything is going. And then you just select, hey, this is all good to import. And then you import it. Admittedly the feedback is again, that's another note we have the product because right now it just tells you how many were imported, how many were updated and how many were skipped. So again, if you have any issues with that, just let us know and we can help troubleshoot.

17706330383

30:20 Okay. And then if Brandon is in a situation where he has lots of things to change, is there a shortcut to a support article? Because if you guys have beefed up Northboundary. The way that service trade is, there is a, of valuable research and information in that support field on how like what fields you can do mass import into Northboundary with. Just so if it's something that we can save him a little bit of time, we can reference that and use that as a tool instead of one for one creating.

ALEX.TAYLOR

31:00 Yeah. Actually, so there is an article on bulk importing and exporting. I'm gonna put that in the chat and just to have a preference, what we can bulk import or import and export, our customers contacts leads opportunities and users. I will say that with the import. And again, this is one of those standing requests I have, you wanna make sure that you check the manual, like when you're building something manually, just check the required fields there, right? Say if you don't put a required field in on the import, it won't import it. And then it won't tell you why. So definitely double check that, and that might be a good place to start with troubleshooting. Say if you run a customer import and it skips everything, well, we forgot to put this particular thing in there. Yeah. So I put a link to the.

17706330383

31:51 And...

ALEX.TAYLOR

31:53 I'm sorry, what was that?

17706330383

31:55 I, I'm a big fan of copying and pasting into the CSV template file.

ALEX.TAYLOR

32:00 Absolutely. And I just sent a link to that article to Logan and... make sure that I get sick.

17706330383

32:08 About that.

ALEX.TAYLOR

32:09 Perfect.

BRANDON

32:11 Cool.

LOGAN

32:13 Okay. I am muted, I thought I wasn't so I've just been like giving thumbs ups.

--- Wrap-up ---

LOGAN

32:19 Yeah. So right now, I'm actually typing out the e-mail that I'm gonna send to you all that way. Everything's already plugged in there for you. So I'm gonna grab that link that you just dropped as well... and I will get this sent on out to you. I'm gonna clean it up just a little bit and make sure you have all information that I want in there for you before I send it, but I'll get this sent out here in just a few minutes.

17706330383

32:47 Perfect.

LOGAN

32:47 To both of you, Brandon and China.

BRANDON

32:50 That'll be great. Thank you, Logan and Alex. You've both been very helpful.

LOGAN

32:55 Of course. I'm happy to help. Thank you, Alex. I really appreciate you hopping on.

ALEX.TAYLOR

33:01 Absolutely.

LOGAN

33:02 Cool. Well, you all have a wonderful day and hook him horns.

BRANDON

33:09 No, that's all right.

--- Wrap-up ends ---

LOGAN

33:11 All right.

The End