



ServiceTrade Demo with Gordon L. Seamen Inc.

Brett Griffith with Gordon L. Seaman Inc.
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Participants

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OTHER

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Transcript

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

KURT

0:00 Man.

BRETT

0:04 There we go. Can you hear me?

KURT

0:05 Yeah, yeah. Awesome. How you doing?

BRETT

0:12 Putting out fires over here?

KURT

0:13 Yeah.

BRETT

0:15 It's making a sandwich. The fire alarm went off. Made a mess.

KURT

0:21 I don't know what's going on.

KURT

0:27 Just mail a day huh?

BRETT

0:31 Middle of the day, I think there's actually, there, there is actually a fire in my building. They're very much in there.

BRETT

0:43 But we'll let them take care of that.

KURT

0:46 And let's see what that later.

KURT

0:52 Any word from? Was it PC the electrical company openness?

BRETT

0:59 I tried to call them this morning. I don't have a good number for John, so I shot him a message on recap. I'm hoping he replies by tomorrow so I can have a lot more time tomorrow and which I can try to figure out next steps... if not. I also put his name and the ZoomInfo channel for them to get me a better number and I'm working on it.

BRETT

1:27 I think.

KURT

1:27 That one's pretty real though. Yeah, that's... I put that up there. Yeah.

BRETT

1:37 Yeah, they're on ServiceFusion today. We gave them the whole the quote for service channel and everything like 80 K. So, I don't know he hasn't given us an objection yet, but you gotta, I think that's come.

KURT

1:53 Yeah.

BRETT

1:56 I don't know service channel with these electrical contractors. They need it... so... hope it.

KURT

2:04 Works.

KURT

2:19 Three Marketo isn't...

KURT

2:30 Yeah, I don't know if it's gonna show up. He accepted the invite last week and then shot.

KURT

3:55 This?

BRETT

3:56 Stop if he shows up to Nick lead, use stage 300 and SM... and they were in love with Tonya.

KURT

4:07 Yeah. So hopefully we can get him on the phone.

KURT

5:58 Hi, I'm back. All right. We're just waiting for him to connect audio.

CLIFFORD

6:15 Hello?

BRETT

6:16 Clifford, can you hear us?

CLIFFORD

6:19 Yeah, I got. Hey, so, guys, I got Andrew look at my office here with me and he is our, he's our service account manager, so he would be the main user on this platform here. So I just wanted to introduce him as well.

BRETT

6:32 Awesome. Well, Andrew, thanks for joining us. Introduce myself. My name's Brett, Kurt, but on the inside territory manager here at service trade for the northeast, thank you both for being here. I also have Kurt demo or on the phone. He's my field rep for you guys. Eric. He lives out on long island.

KURT

6:46 Hey, guys. Bye.

CLIFFORD

6:48 Hi, Kurt.

CLIFFORD

6:50 Thanks.

BRETT

6:51 Awesome. So, guys, thanks for being here again. My understanding is you talked to some of our team over at that and you could conference and it sounds like you liked what you saw and you wanted to dive deeper in with the demo? Well?

--- Purchase decision ---

CLIFFORD

7:04 Hello, is there, is we wouldn't spend too much time looking at exactly what it was basically, what would, we know we knew we were looking for... to take us to the next level as far as our service and what we're doing here. So all we're really doing it, the main conference was just going around and saying, hey, wait until we need to talk to you guys and we need to set up meaningful when we get back to see what we can do here.

--- Purchase decision ends ---

BRETT

7:26 Yeah, absolutely. And I'm looking at my notes here, Andrew, it looks like I spoke with you back in like 2020, I don't have the exact date, but at the time, it just wasn't a good situation for you just switch. So I'm glad you're back.

CLIFFORD

7:40 Yeah.

CLIFFORD

7:41 That's great.

CLIFFORD

7:43 Yeah. I mean, I doubt that's the case because they just started with us in August of 2020 and he wasn't even in the service department.

KURT

7:50 Let's see here.

CLIFFORD

7:54 Yeah. By you started August 20 ninth?

CLIFFORD

7:56 It got a pretty good memory on this stuff. Yeah.

CLIFFORD

8:00 Hello. Regardless. We're here now.

--- Purchase decision ---

CLIFFORD

8:01 So let's talk, you know, we, we've just so, you know, we are we entertaining about five different platforms here, five five different, you know, software platforms here that we're looking at doing. We're setting up meetings and we're looking to implement right away as well. So, it's W, something that we see evaluate and we want to, we're going to move forward with aggressively here for our service department at?

BRETT

8:24 Really, it sounds like good plan. What else are you guys looking at those five other platforms? Yeah.

CLIFFORD

8:29 Yeah. So we have you guys, we have Simpro, we have build ups. We have a service tighten. I think that's it. Yeah, Simpro, BuildOps ServiceTitan... you guys maybe one, I forget, I don't know we, I mean, we've been like every week here for the last week or so.

BRETT

8:57 Okay. Totally understandable. And you guys are doing exactly what I would push you to do as far as you should look at everything on the market to figure out what's best for you guys. But with that aggressive timeline, as far as, you know, once you find it, what's your, do you guys have a budget as far as software?

--- Purchase decision ends ---

CLIFFORD

9:13 Little as humanly fucking possible. No, we don't really have a budget. You know. I mean, listen, we're looking to accomplish a number of things here and we're really, we don't have a budget because we've never really invested money in this. Those are, you know, so Brett we were Construction company, we do large Construction projects.

--- Type of work ---

CLIFFORD

9:32 We have divisions within your organization that do service work and we've always handle them like start like Construction projects just by the smaller, which is probably not the right way to do it. Gotcha. So I'll be leaving listening a lot of experts talk and we've been sitting here in Nika shows for years and everyone's been saying to handle separately and we're finally bucket listening.

BRETT

9:54 Yep. Nope. You guys are, you guys are there? So you mentioned there's certain things you're trying to work on aside from, you know, breaking up service in Construction. Do you, are there specific things that you guys are trying to fix?

CLIFFORD

10:07 Wrong. Let's go through the...

BRETT

10:11 Absolutely.

CLIFFORD

10:13 Have I have an email here or what are your competitors? Summarize what we told?

--- Type of work ends ---

CLIFFORD

10:19 Yeah.

BRETT

10:23 You can send me that. You can read it off to me, whatever works.

CLIFFORD

10:26 How can they were, not that long... right? We're not that. So... what we're looking at here is our current situation. So our service department is on a spreadsheet. Currently, we have no visibility into schedule to track the team.

--- Invoicing ---

CLIFFORD

10:48 Our quotes are handled in word or excel. So we have a lot of room for human error and there's no way really to track our status of it other than remembering what's going on or invoices, double entry. We enter everything gone through like our service module. And then we go ahead and we entered read to our accounting system.

--- Paper process ---

CLIFFORD

11:04 So there's a problem. There are priorities we want to streamline our communication from our field, the office order to invoice. We want more visibility into the schedule, being able to make changes in real time. We want consistency and invoicing to avoid items slipping through the cracks. We want to create a scaleable operation within the service department.

--- Purchase decision ---

CLIFFORD

11:25 Our timeline is immediately and reviewing software options for the next two weeks. The next steps with the other guys is a demo that we have tomorrow. And then we have a couple of other things here as well. We want, we're looking for procurement for Tableau as well as track stop.

--- Purchase decision ends ---

CLIFFORD

11:40 We're also looking for service ticket generation. We're also looking at rates being assigned per customer within the system as we have many different rates for different customers based on levels of work that we're performing. Then we're also looking at that test equipment and test report.

BRETT

11:58 Explained that last wouldn't be test equipment test reports with, I mean.

CLIFFORD

12:01 I don't know my David Andrew's assistant notice on here. You know what she's talking about? Yeah.

CLIFFORD

12:07 Hi, it's probably like a like live testing reports and for it our own.

CLIFFORD

12:13 Yeah. Well, we do like some preventative electrical maintenance here. So we do some internal reports, maybe having a good way to be able to view the last one. I really don't know that one in fairness.

BRETT

12:24 Okay. No worries. Everything you guys are talking about role.

CLIFFORD

12:27 We can cover... anything.

CLIFFORD

12:30 Yeah. Well, you guys can cover this.

BRETT

12:32 Yeah. I mean, everything you said there, I don't see a problem with Kurt.

KURT

12:39 No, I did not. Nope.

BRETT

12:41 So that's exactly what we're going to cover today. The only thing I can't cover today.

--- Parts management (inventory) ---

BRETT

12:47 Well, let me ask you some further questions. Is you said truck stock as far as technicians, getting parts? Are they the ones cutting? Po? Is the office doing it? What's that look like?

CLIFFORD

12:58 Is it on our service stuff? A lot of what we're doing is time material. So our, to, our guys are able to go into directly order right? From a supply us and they don't pick it up?

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

BRETT

13:08 Okay.

CLIFFORD

13:09 Please, he is not centralized decentralized as far as the purchase orders. There really isn't a purchase orders. We just do the work order number and then assign it to the project accordingly.

BRETT

13:19 Okay. And then, are you guys, so you said most of it's PNM, is there any inventory that you track? And?

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

CLIFFORD

13:27 A little bit, but nothing too crazy to be honest with you, right? I mean, stop me if I'm wrong or?

CLIFFORD

13:32 No, it's pretty basic stuff.

CLIFFORD

13:34 Yeah, nothing too crazy. Well, most of the stuff that we have is inventory is really just stop what the promote a job that we're already got paid for that. We're charging for them again.

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

BRETT

13:44 You're not looking for a solution that's gonna track inventory, tell you, hey, when we get down to three items reorder?

CLIFFORD

13:51 Nope.

BRETT

13:52 Okay. Making it easy on me. Alright? I think I have all the information I need aside from it, say 300 for the accounting system, right?

CLIFFORD

14:03 Correct you guys, integrate, correct?

--- Parts management (inventory) ends ---

BRETT

14:05 Yep. That's a conversation we need to have that's just that's the one thing I can't cover today. We're going to need our accounting specialist on the phone. I think you guys met her at any given time?

CLIFFORD

14:15 Yeah, I don't know. I've met a lot of people man.

BRETT

14:19 Yeah, I bet.

--- Purchase decision ---

BRETT

14:20 So, let's go through service trade today. Let's see what you guys think. If you like, it will dive deeper in within accounting, a scoping call for say 300?

CLIFFORD

14:27 Yes. Yeah. This is, you know, you gotta past meetings with first before we get other stakeholders within the organization involved. So, he and I are the gate because right now we're doing all additional calls. I can tell you that we've already had one follow up scheduled. We have one, not follow up scheduled in fairness as well. So.

BRETT

14:46 Okay. I gotcha. I'll ask you that same question at the end of our meeting today before we do get started guys. Do you have a hard stop time wise?

--- Purchase decision ends ---

BRETT

15:03 Did you hear that?

CLIFFORD

15:07 Got you there?

BRETT

15:08 Yeah. Can you hear me?

CLIFFORD

15:10 Hello? Yeah, we want to get done in 220 to 30 minutes.

BRETT

15:14 Alright. Well, let's stop talking. Let's get started. So what I'm gonna do you guys, I'm gonna share my screen. I'm going to start with some slides, get into it to give you a little background.

CLIFFORD

15:24 Looking at your screen here, so you're good to go.

BRETT

15:27 Okay. So service trade or service management program designed specifically for commercial service contractors? I don't work with residential contractors. I'm only working with skilled contract contractors at that. So we started in the fire and life safety industry about six, seven years ago, we broke into the MSP space. We've got a 1,000, about a 1,000 customers in the states and in Canada and companies are coming to us with anywhere from three trucks on the road all the way up to 300 trucks on the road. You guys have 17 text, right?

CLIFFORD

15:58 Is it, so we would really be looking for this between for our really our small works area, which would be about roughly about 20 tests, you know what I mean? And it would include low voltage fire alarm as well as the Nashville.

BRETT

16:11 Okay.

BRETT

16:15 Gotcha. Okay. We'll talk about that low air on, but lead into my mission statement here to help commercial service contractors be more valuable to their customers. And at the end of the day grow their business. What stage of growth is your company in? Or are you guys, have you grown already or are you trying to grow right now?

CLIFFORD

16:34 Well, the stage of growth for our company, you know, we're aggressively trying to grow the service portion of our company. So our preventative maintenance

inspection, things of this nature, we're aggressively pursuing growth in that area. On our infrastructure side, we're really not aggressively pursuing growth.

BRETT

16:53 Okay. And is adopting new software on the agenda for aggressive growth on service.

--- Customer engagement ---

CLIFFORD

16:58 Only way I see us growing.

BRETT

17:01 I couldn't agree with you more by another thing we want to focus on for you. All it's essentially turning your service business into a customer service business because realistically your customers are the most important part of your business without them. You guys probably don't have service department and we want to grow it. We don't want to take disappear. So what we focus on for that is what I like to call the agent online customer service guys. What I like to relate this to is Amazon prime. If you've ever ordered something off crime, you know that, hey, you pushed by now, you get an email that came from Amazon. You get a picture of that package at your doorstep that's incredible customer service that's the same exact level of service I want to help provide to your customers in the electrical space. So some different ways will help out with this. First off, you've gotten route notifications, which is really that first touch to the customer, letting them know we are on the way customer's going to receive a picture of that tech as well as their EPA and Clifford, I'm gonna send you a copy of what this looks like right now.

CLIFFORD

17:58 My email.

BRETT

17:59 Yes, sir. Next up, we've got online quotes. So I understand that when your text are in the field doing those PMS those inspections, they're probably finding deficiencies or repair opportunities. I want to give text a really easy way to log and track that information from the field number to a way for you guys to quote that out, get your quotes away from the word documents you mentioned earlier and actually give you a way to report and track them. But number three, I wanna make that quote really easy to approved from your customer point of view. So you're gonna see one click approvals. But on these quotes, these pictures are really important because they change the conversation from strictly the price to the problem at hand. Our customers that are using anywhere from three two five pictures on their quotes are seeing increase of 30 to 40 percent and repair revenue year over year talking about growth.

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

CLIFFORD

18:47 Yeah. What is over?

BRETT

18:50 Perfect. Next up? We got service link essentially a fully encompassing post service report going out to the customer after the work is complete. So showing them who came out, what he did, what he used, any of the files or photos from onsite. If you did fill out a PM checklist that's here as well as any deficiencies.

--- *Customer engagement* ---

BRETT

19:07 So really just telling them everything you did. So when you send the invoice, they don't have any questions for you guys?

CLIFFORD

19:15 Yeah. Okay.

BRETT

19:17 Also along those lines, you have the service portal which would go on your guy's website, get them pretty nice websites. Customers could come in and see your entire service scheduled for their location specifically, but also a place where they can see any kind of service history.

--- *Invoicing* ---

BRETT

19:29 They want to know everything that happened to that electrical panel over its entire lifetime, that can be down in their portal.

BRETT

19:39 And last step guys, I know you stage 300 and we're gonna talk about the integration after this, but we do have a way for you guys to Bill your customers via service trade. It's called the invoice link. This is helping our customers get their bills out to the customer a little bit faster. Most customers are decreasing their days outstanding by about 15 to 20 days. And customers really just found, hey, if my surface information is already here, why not give them a way to take payment from the customer by sending you the invoice? That, that's exactly what this is.

--- *Access to information* ---

CLIFFORD

20:07 Okay.

BRETT

20:09 Alright. Any questions, guys?

CLIFFORD

20:13 No, I'm...

CLIFFORD

20:15 Good for now.

BRETT

20:17 Okay. Let's jump in if you've got questions during the meeting, feel free to fire away. This is your guys time. So first thing you're gonna see is service trade, the cloud based system. We're looking at the office. You right now, I'm gonna show you the field momentarily.

--- Access to information ends ---

BRETT

20:31 But first thing you see is the service dashboard. It's really giving you have visibility into your day. So I've got my daily schedule here's. All my text with the job at whatever respective locations they are going to. This page. Is also giving me the status of all my different work orders. So if I do have anything that's overdo not on the schedule, we're letting you know front and center that you guys need to schedule that. So you can go deliver the work and get paid. Next steps, you got jobs that appointments do the next two weeks, which hey, realistically, I don't want anything to be overdue for you also letting you know front and center again to go schedule it.

--- Tech On-site ---

BRETT

21:05 This one right here is real important past jobs to be more complete. Essentially, when your technician complete their work order from the field, it bounces back to this bucket in the office. It allows the office to come in and review it, make sure everything is correct, parts labor job items, all that good stuff.

--- Invoicing ---

BRETT

21:20 Once it's complete and correct from the office, you market complete and it falls down to our completed jobs to be invoice telling you, hey, either gotta push the invoice through service trade or via the integration over to stage 300. Also on this page as current tech locations.

--- Tech On-site ---

BRETT

21:38 So this is based off your text mobile device essentially want to techniques o'clock event on their mobile device. We take a G, a snapshot of where that tech is located within, drop a pin on this map. Like you're seeing here, you will see a list of those clock events below as well. Questions?

--- Invoicing ---

CLIFFORD

21:58 Question, do we, would we have a notification that the client would approve this invoice? Or if we, is there a notification that will notify the client pay?

BRETT

22:13 If the client pays you'd, be a service trade, you'll get an email saying XYZ paid you. If the client pays you via states 300, I don't know what that looks like on that side.

CLIFFORD

22:22 She doesn't like... close. I mean, like we, if we send the invoice, and then, yeah, if a job is closed and they get the invoice, and then... would it be in the same system? No.

CLIFFORD

22:41 Can you handle engaging... but you shouldn't be worried about.

CLIFFORD

22:45 That's not my department gotcha. No worries. Okay. I'm going to get people.

--- Recurring maintenance ---

CLIFFORD

22:57 Yeah.

BRETT

22:59 Okay. So first thing I want to show you guys is really how service trade is structured. So because we are built for commercial contractors were set up with a ship to an appeal to, I imagine you guys work off that every single day. Is that right?

CLIFFORD

23:14 Yeah, absolutely.

BRETT

23:16 All right. So, in this case, but what universities my Bill to work and specifically about your health today? So I have that pulled up and write your, this is my location page, essentially my record of truth for this customer. Anything I do for them is going to be here under services. So you're gonna see I have a couple of deficiencies up top. And as I scroll down, I do get more into my recurring work whether it's a fire alarm inspection, it's an electrical inspection. This is going to be your guys verbiage inside of service trade. You're gonna tied it to the piece of equipment that the services occurring on and you're going to set it up on the recurring basis that we go out that way service trade can remind us to do the services. Does that make sense?

--- Assets ---

CLIFFORD

23:54 Yes.

BRETT

23:56 So, below services, you have assets or the individual piece of equipment that we're working on here's, my alarm system. I get really granular with type information. I track same with my electrical panel. The reason we're tracking assets inside of service trade is for really Rich service history. If I want to know anything that happened to this piece of equipment in the past, I can click into it from the office. I can also see it from the field on my technician, mobile device.

BRETT

24:24 But below that, yeah, you'll have a list of all deficiencies and quote sent for this location.

--- ST app contracts and pricing ---

BRETT

24:28 But I want to point out contracts because you guys mentioned different customers have different rates that's exactly what this is. So it's different pricing contracts, essentially different markup rules. You can have one. You can have as many as you want in here, but essentially you'll default these contracts to your customers. So when it is time to quote them or the invoice on the market pros automatically apply.

--- Recurring maintenance ---

BRETT

24:52 Make sense? Yes. Okay. Any questions on this page before I move on?

CLIFFORD

25:00 Definitely.

BRETT

25:02 Alright. So what I set up for today's is preventative maintenance job means the same thing is work order inside of service trade. So Clifford I went ahead, put you as my primary contact right here. And what I set up for today is I saw on your website, you guys do a little bit of generator work. Is that right? Yeah.

CLIFFORD

25:19 Yeah.

BRETT

25:20 Okay. So I set up both of generate a recurring service right here as well as the service call. Again, this is going to be your guys burbage inside of service trade, you can put as many services on one ticket as you want.

--- Assets ---

BRETT

25:32 Realistically, if you're going to location, you might as well get it all done one ticket versus sending your technician to location six times in the month of November. How we break it up is what we like to call service granularity in a way that you can tag correct parts, labor items as well as attachments and comments, each individual service at hand more for job costing reasons.

--- Quote templates ---

BRETT

25:52 I want to know where I use the labor where I use the parts. As I scroll down my part of my labor, my items will be broken up by service right here. And as you can see, these are the two assets that we're going to work on today.

--- Access to information ---

BRETT

26:07 At the very bottom. I don't have any attachments right now. We're going to go out to the field, be a technician. I'm gonna show you how all this information reflects back in the office for you all. Yeah. So I'm currently on an iPad or compatible with both iOS and android devices. So you guys pick it. Only thing I'm not gonna work with is like those Microsoft surface tablet, but they using the NFL... right here. I hit this filter by today option. So it's just showing me today's, job by turn that off. I see every job that I'm scheduled.

--- Tech On-site ---

BRETT

26:37 This keeps a little cleaner. So we're working here at bother. Health. First thing I might do is while I clocked in and route eight minutes ago and I came in here and notify Clifford, but I was on the way via email. But now that I'm on site and then o'clock, out event route. I'm gonna clock in on site that's gonna attract my hours in the background technician when he gets the location, he's probably gonna click up into services is gonna tell him everything that is performing on site today and everything here's permission base. If you don't want them to see price that can be turned off.

--- Deficiencies ---

BRETT

27:07 But this is all of your guys verbiage from the office. Okay? Below that, as attachments, a lot of my customers today are taken before and after pictures there,

essentially showing the customer the work that they're doing for them. So whether you're doing before and after pictures or you just wanna take a picture, whatever happens, we can add that here and you can add as many pictures as you want.

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

BRETT

27:28 You can also do audio recordings or videos. Talking about the material we use. So click into Jobvite them here's. What was initially on this ticket? If I'm a technician though, and I need to order a part, I can come in here and I can either grab something from your guys list or I can add an additional part that's maybe not in this list.

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

BRETT

27:51 In this case, let's say I grab a widget and I need to source out where did I get it from? I can select the parts vendor and say which parts vendor did I get it from? I'm gonna say acme supplies. I can enter the po number question. Do you guys want to continue doing po is like you do today with the job number?

CLIFFORD

28:13 You're a work order or job number? But yet there's needs to be some tracking them.

KURT

28:17 Okay.

BRETT

28:22 Right here... I'm gonna go, give me one sec. So just looking at my job number, we're going to go last four, one, nine seven, eight. There's. The tracking of it is tied back to this job. I can then mark the status of this part. So has it they had not yet ordered or received. In this case, I'm gonna say I received it and I brought it to the job and I did the job. Does that make sense? Yup. Okay.

BRETT

28:55 I'm sorry, I missed something there.

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

CLIFFORD

28:58 We don't see any value in this. We can move on.

BRETT

29:03 You don't see any value in that? I thought you guys had a track pardon?

CLIFFORD

29:07 No, we need to track our purchase orders and our... material things.

BRETT

29:16 And is that I need a little more explanation you need to track your guy, goes to the vendor and grabs 18 widgets. Is that what you need to track or you need to track them?

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

CLIFFORD

29:26 He, he gets the receipt ticket from the vendor. So what you just showed me it would be attachments is basically.

CLIFFORD

29:33 Be probably a lot.

CLIFFORD

29:34 Easier.

CLIFFORD

29:36 For...

CLIFFORD

29:36 The tech just put in or take a picture of the attachment scan your services done? Yes. Yeah. So you're right? You can just, you can just name the ticket, scan, the document, name and ticket, the ticket number away. Got it from.

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

BRETT

29:53 Okay. Yes, that's the clarification I was looking for. So you can scan it in. This is all gonna reflect in the background?

CLIFFORD

29:59 Yeah, he can talk to Jonathan is going to be on the ticket. You can just...

CLIFFORD

30:02 Hello? Hi, going.

CLIFFORD

30:04 To confirm that everything on the job and then we can go.

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

BRETT

30:09 Okay. So, I'll say this picture is our scan and receipt that will reflect in the back office.

CLIFFORD

30:14 Soon as we were trying to give you some feedback here.

BRETT

30:19 Can you expand on that?

CLIFFORD

30:21 And then...

CLIFFORD

30:24 This is the question about the paperwork that's where we can put it on generate tickets generated forms. Again, it gives us, you know?

--- Forms ---

CLIFFORD

30:31 Okay. No.

BRETT

30:32 I'm not.

CLIFFORD

30:34 Find the forums.

CLIFFORD

30:35 Yeah.

BRETT

30:36 I'm not gonna give you forums. I'm gonna take the forms that you guys use today and put them into service trade because every single one of our customers is different.

CLIFFORD

30:43 Yeah.

CLIFFORD

30:44 Yep. Yep.

BRETT

30:45 Yep. So.

CLIFFORD

30:46 Like right now we're using pro core to fuck around with it. So we have like a form section where all of our stuff's in there, like.

--- Assets ---

CLIFFORD

30:53 Auto fills that whole payment gotcha.

BRETT

30:56 Okay. So we'll get the forms. And the second, let me show you guys a couple of other things assets you talked about service history. If I want to know what happened on this generator over the past over its lifetime? One, I click into it here's. All the information I know about it. But to here's, service history here's. Every single work order I have done on this generator at this Butler health location over its entire lifetime. So technician can click into it and see what happened last time. They can see who was the technician that came out.

--- Deficiencies ---

BRETT

31:23 So it's simply slide over. It was myself. What did they do? They did pull light in generator work. If they took any pictures, they'd be here. And then if I bounced back one or two, I can see any deficiencies that were founded this location. It looks like I had bad battery back November 2021. Is that the information that your technicians are looking for?

--- Deficiencies ends ---

CLIFFORD

31:46 Yes. Okay. So also, is there a, is there a way of having like my text profiles where even if it's not one location, I can administer worries in like let's say last week, I'm on vacation, I come back and I can get the history of, well, let's see Thursday. Let me see Wednesday just office profile just now.

--- Tech On-site ---

BRETT

32:13 If you're logged into his mobile app, you can see all of his completed jobs. I can run a report of his completed jobs from the office. Those would be the two ways to do

it. Okay? But let's talk about those forms. So how it's gonna work guys, is I'm gonna hit the more detailed technician is gonna come in here.

--- *Forms* ---

BRETT

32:34 Like I said, we're gonna take your guys forms, put them into service trade. So when I hit actions and I go to blank paperwork, it's going to be your form dispatched based on the type of work that you're doing. If it's a fire alarm job, you're getting the fire alarm for that to generate or job of getting the January report. Does that make sense? Yeah. Okay. So I'm gonna use this one as an example. We're gonna hit generate and what we're gonna do is open these up through Adobe. Acrobat. Adobe is a free app. It enables us to smart fill these forms. The end of the day, you guys are paying your technicians a lot of money to do the work they do. They shouldn't be having to type in admin work in the field. That's why everything pre-sales in right here. And then these are just physical documents to your tech goes in whether it's checking off the boxes like so or it's writing and free form information. They write whatever they need to do on their form and they finish it up. What questions do we have here?

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

CLIFFORD

33:27 Hello. Good. Perfect.

BRETT

33:29 Right. So all I gotta do is add this back to my service trade job. I simply send a copy. Service trade knows, we're clocked in here about their health. So when I hit add the service trade, it says, hey, do you want to add it to this job?

--- *Deficiencies* ---

BRETT

33:39 I say, yes, I uploaded, we're down there. I go back to my service trade ticket will under paperwork and attachments, that paperwork that we just added this here. I'm going to show you that in the office as well guys, how often are your technicians finding deficiencies?

CLIFFORD

34:01 So, yeah, good question.

--- *Forms* ---

CLIFFORD

34:03 But it's you know, what we do is not that much because we do we provide reports, we find efficiencies or deficiencies get marked on their info report that we submitted as part of the cold requirement. And then why don't we, why are we do

like all the service work for walmart. So when we do those, we have to utilize their forms. So we're not even gonna utilize something like that.

BRETT

34:25 Okay. And for walmart, I use and isn't like service channel like third party?

CLIFFORD

34:30 No, it's all itself so excel based.

BRETT

34:33 Okay. But it's like their form and you have to fill out.

CLIFFORD

34:37 That's correct?

BRETT

34:39 Okay. So, essentially, what we can do is if you can get their form, we can put it into service trade to your text, can fill it out and you can, it'll just be a PDF that you can take from service trade and submit to whatever portal you're submitting it to for walmart for example?

--- Tech On-site ---

CLIFFORD

34:57 Okay.

BRETT

35:00 Cool. Anything else from the field that you would like to cover that I haven't touched on yet, aside from getting our work signed off, on, which I'm gonna do right before we leave the field?

CLIFFORD

35:16 Yeah, I think we're good for now. Okay?

BRETT

35:20 So, let's get that work signed off on, let's say create working knowledge meant essentially your tackle come in here, pick their onsite contact, tackle, go through all these fields right here and make sure everything is correct. If you want this button to be here, we'll keep it here but it's permission based. If you don't want text to generate invoices on site, we will leave that strictly for the office.

CLIFFORD

35:38 Good.

BRETT

35:40 They'll hit review at the top. I'll hand this around some onsite contact or click. You would come in and review everything. Make sure it's all correct. Agree to my t's and c's you would say, yep, I acknowledge it. I'm gonna make sure your information is correct. I'm gonna send you another copy of something and you're gonna see what that working knowledge it is once I get the work signed off on. So from there guys, I'm simply clocking out of the work order. I'm saying, yep, finished both these services. It's gonna ask me if I'm done? I'm saying yes, if I hit, no, that means, you know, maybe I'm going on lunch and I gotta come back to this job later this afternoon. But if I go back to my scheduled screen, you can see it disappeared it is over here in completed.

BRETT

36:21 So back in the office, couple of things happen there guys job status currently says in Progress however down into appointments that says completed that's because my technician just completed everything he was supposed to do on site. So this work order is in this past jobs, more complete bucket in the office.

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

BRETT

36:38 So you guys are coming in, you're making sure everything's correct. You see that, hey, Brett added a widget from actually supplies with the 1978. You guys don't have to do it that way. You can also do it with, hey, there's that stand receipt that he took.

--- Quote templates ---

BRETT

36:50 I want to match it up with the labor that we're charging the customer or the parts that were charging the customer here. Does that make sense? Yup. Okay. So as I scroll down here's, that paperwork I filled out, you guys do what you need to do with it here's.

--- Tech On-site ---

BRETT

37:06 Any pictures I took there's, my scanned receipt. And there's where I got my work signed off onto. Everything is reflected over. So from here, once I make sure everything is complete, I'm simply going to complete it and create the... this is a chance for you guys to select the contract pricing for that customer.

--- ST app contracts and pricing ---

BRETT

37:22 This is the default for the customer. For any reason. I need to change it. I can do that right here. But it's also a chance for you guys to review your unit cost, not your unit price. So we're going to simply create the invoice. And right here, this is my pro

forma invoice inside of service trade. See right off the bat, my margin is only four percent. I don't like that. So let's go fix it. This one, I don't have a markup on it. So we will put a markup on it. My margin is now 45 percent. Before I send this invoice to the customer, I can pick and choose what level of detail I share with them.

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

BRETT

37:54 So do I want to go full blown out of the prices just grand total you guys pick right here. And then if we're taxing customers, we select that here. So couple of ways to do this guy's. I can send out my invoice via service trade here's. What it's gonna look like. Cliff. I'll send you a copy, but I'll pull it up as well.

--- Customer engagement ---

BRETT

38:16 If it's coming in through service trade, this is what it's gonna look like. We're talking about, you know, engaging with the customer. It would be your guys logo up here, getting this in front of the customer and giving them a really easy way for them to pay you through right here.

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

BRETT

38:28 But if they have any questions, what you're charging them this much money for, they can click this button which pulls up in the service link essentially telling your customer everything and anything you did for them. So Brett came out this time here's. What he did here's. What do you use here's? Any files or photos he took. So customer can go ahead and download that form. They can see where they signed off on the work that you guys did. Forum can see any pictures you took on site, important to point out. You can pick and choose what goes out to the customer.

--- Accounting integrations ---

BRETT

38:55 So if you don't want to include that stand receipt from the hard part house, we can turn that on. Okay? The other use case guys is going to be, hey, I want to send this to my accounting system that's what that's how the conversation with tiny. It comes into play where we need to map out how is this gonna work? As far as integrating with stage 300? And Kurt, you might know better than I do is the stage 300 integration? Yeah. Dynamic.

KURT

39:25 I believe so. Yeah. Okay.

BRETT

39:27 So it is a rate I'm like 99 percent. Sure. On that one, it's a written integration. It's not very customizable. It's custom to you guys based on what you want. But that's a conversation. We need to have a Tanya as far as what's going to map over from service trade in stage 300 for you? All. Okay? So that's the invoicing, what questions do you guys have?

CLIFFORD

39:49 Doesn't really? I mean listen, a lot of our, a lot of our customers are institutional. So we have to utilize like their billing platform. So we wouldn't really see it as a way to send out, you know, send the invoicing. But as far as preparing them and transfer them into your accounting system for that import into their system. I could see that working there, but it's definitely a good tool. Yeah.

--- Invoicing ---

BRETT

40:08 Yeah, absolutely. And essentially, the integration is just gonna take whatever is in your invoice and service trade and push it over into Sage. Yup. Perfect. So a couple of things, let me just run down my list. We need visibility into schedule, need to cover that... you need to cover.

--- Recurring maintenance ---

BRETT

40:31 Okay. So let's go over a little bit scheduling and then we'll finish with reporting. So for scheduling, you guys said you're trying to get more into the PM world. I want to give you a really easy way to track all your PM, I'm doing that on the location page like I showed you guys earlier, but you need to be easier way to schedule this as well. So you guys would run this report right here. Essentially pings all your different locations and looks for jobs that are do within whatever parameters select. In this case, I've got 14 jobs for today's. Demo. I'm just gonna select a couple of these. So these six jobs, I search for recurring services.

--- Dispatch ---

BRETT

41:06 I know these are all PMS... if I have preferred technicians that I want to send to these six locations, I can write his or her name here. Letting your dispatcher know, hey, Brett available san Brett first. If not, I'll leave it blank just to show you at one.

--- Recurring maintenance ---

BRETT

41:21 He just location. We've got multiple icons here that's letting us know that, hey, there's multiple services do with this location service trade is gonna put them all in one ticket for you guys because they all are do in the month of February, there's no sense and you guys go in that location eight times in a month.

--- Dispatch ---

BRETT

41:39 So from here, we're going to create these six jobs. Those six jobs are gonna disappear and they're gonna fall into this map based scheduler.

BRETT

41:50 Easy amount here. So we're going to go out to greensborough right here. All these pins that you see on the map, these are all different job that are assigned to your technicians. If I close out some of these offices, I didn't point this out earlier, but you guys can break your service trade account into different offices as you see fit. Maybe you want to fire alarm office and electrical office, a generator office, so on. But the jobs that we added from service opportunities, they fell into this map is these gray pin, right? Pins are telling us the jobs are both on assign an unscheduled that's exactly what we're here to do this job out in Greensboro, North Carolina. I'm gonna take my technician broke. I'm gonna drag and drop her to that pin. She is now assigned to that job. And then as far as scheduling her, I'm gonna schedule her for Friday the eighteenth, you can see at gains that calendar in the pay and letting me know this job is scheduled for 1,118 eight am. It's expected to take two hours... questions.

--- Access to information ---

CLIFFORD

42:42 On this, on a mobile device. If I'm on the road and I tried to schedule things on the go, how is it a bit of a process of being on my computer? A laptop?

BRETT

42:52 It's the same process, just permission based setting to allow you to do that. Okay?

--- Dispatch ---

BRETT

43:00 One other part of scheduling that I will show you, it might be a little easier to do from the field would be the dispatch board. So similar to my map base schedule in a way that all my text over here on the left hand side, this is me right here. How I like to describe it. This is my swim Lane horizontally across the screen. So if I need to add a job, I might come up here at a job and, you know, let's say comcast and our calls me.

CLIFFORD

43:24 Right. Yeah. Can you show us how to do it from the mobile aspect of?

--- Tech On-site ---

BRETT

43:29 I got a, I, just my settings.

KURT

43:31 Yes.

CLIFFORD

43:33 That's what you want to say?

CLIFFORD

43:34 Yeah.

BRETT

43:39 No, I'm an admin for good.

BRETT

43:47 All right. You click into any job doesn't matter what job, you don't have to clock in, it'll be more details. It's gonna do exactly that from here. I'm gonna hit this back button. I'm gonna hit this hamburger button. And then I'm going to go into service trade right here.

--- Tech On-site ends ---

BRETT

44:06 So it gives me what you guys just saw from the office. So I would come in and say, let's go dispatch board.

BRETT

44:28 Might take a second. As you guys can see, it's made for a computer.

BRETT

44:51 I'm gonna try again.

BRETT

45:02 How often are you guys scheduling on the road?

CLIFFORD

45:06 No.

CLIFFORD

45:07 But we do... we tend to anything in the scheduling and turn on intent. So I can go on the road, we have to go to this job, Margie call.

BRETT

45:24 Here's how I would do it. Disregard what I just said, I'm gonna change that around a little bit.

--- Tech On-site ---

BRETT

45:29 I'm gonna give you more details, go through that same process. As far as going back here. I'm gonna go back and I'm just gonna go add a job. It's gonna be a lot easier on your mobile device to add a job. So I can say comcast and are called me... comcast centers information in here.

--- Dispatch ---

BRETT

45:45 What they called me about, they need of emergency service call, I can pick their job contract right here and I can go ahead and schedule it. So let's say I was gonna take two hours, save it in... right here. I can then add whatever service I need to add.

--- Quote templates ---

BRETT

46:03 So if I, we have a concept of templates, if you already have templates built in, this can then be a lot easier to do on the road. So I'm just gonna pick a template. I know I have... it fills out all my information for me, it already at the job items that are attached to this template as well.

--- Tech On-site ---

BRETT

46:22 So I can save that in and can hit back. I can add whatever job items right here. I can assign technicians right here. There's the assets at this location and this job is now schedule?

CLIFFORD

46:34 Yeah.

BRETT

46:37 No questions.

CLIFFORD

46:42 Clifford...

BRETT

46:45 I'm sorry, what was that?

CLIFFORD

46:47 Hello? Good.

BRETT

46:49 Okay. So that was really scheduling in a nutshell whether you do it from the field or from the office, that is fine.

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

BRETT

46:55 But bunch of different reports you guys can run in service trade for, you know, overviews of what your technicians actually did. So if I want to run a job report, I can come in here. Show me all the jobs where parts are ordered but not received. Well here's.

--- Quoting ---

BRETT

47:09 All your jobs, we're just waiting on parts for you can click into those. Find that information. If you want to run other reports for show me all of maybe appointments complete where Brett was a salesperson... I don't think I'm set up as a salesperson projects or Jack was the salesperson here's, all the jobs rejecting salesperson.

--- Tech time tracking ---

BRETT

47:28 But as you can see, there's all these different parameters that you guys can report off of. You can also go job clock events if you want to track time, that can be export it to your payroll system. Unless you, do you guys do that in Sage or do you have a different system for it?

CLIFFORD

47:42 As far as clocking time?

BRETT

47:44 As far as payroll?

CLIFFORD

47:46 Yeah. We're doing that for Sage.

BRETT

47:48 Okay. So it's going to be a simple export of job clock events for that. You can do it for all your technicians. You can narrow it down to one technician. You guys pick how you want to do that. But here's all Brett, the clock events, we can simply export that to a spreadsheet and then import it into stage. But if we go the integration route, that's something we'll talk about because that information we'll go over automatically. Okay. Couple of other reports we can run, you guys talked about quoting quotes are currently in word.

--- Quoting ---

BRETT

48:15 There's no way to track them. Well, if you send a quote through service trade, everything can be tracked. Same way, all these different parameters, couple of core reports I like to run, show me all the quotes that have been submitted and viewed but not actually approved by my customer here's. Every single quote. There are 33 results there's. A lot of money in those quotes that adds up. It's a lot of money being left on the table, a lot of stuff slipping through the cracks. So maybe you guys want to focus on these back out to the customer. Maybe they deleted that email. I just want to bring it to the top of your inbox. I can send these in bulk and just say top of inbox, whatever it is and I can send them. And then Andrew, I think it was you that asked earlier as far as the invoices can I say, can I see if they paid me?

--- Customer engagement ---

BRETT

48:58 I can see, hey, show me all the invoices that have been fully paid... here's. A report of every customer that's paid me.

CLIFFORD

49:07 Well, that's only through the service trade system, alright?

CLIFFORD

49:11 You're right?

CLIFFORD

49:14 Yeah. So that, okay. And we're pretty good on the invoices here.

BRETT

49:18 Okay. Is there, I'm running through my list as far as what you guys told me earlier, I'm giving you visibility into your schedule, getting your quotes off of word, reducing data, entry into accounting, streamlining, communication, avoiding things slipping through the cracks... tracking truck, stop, giving you rates for customers and the test reports. Have I covered all of that today?

--- Customer engagement ends ---

CLIFFORD

49:44 Yeah.

BRETT

49:46 Okay. So, I'm gonna put the ball in your court. What are your guys thoughts on service trade?

CLIFFORD

49:54 Good. Definitely a lot better than what I'm doing now, creating my own excel sheet. I would love to just to take a look at it even if you can send me a link just to get a demo of like being hands on with just the test is, you know, for a day or whatever with my service team?

--- Implementation and ongoing support ---

BRETT

50:15 That's tough. And the reason I say that's tough is there's so much work that goes on the back end. I'm setting up these accounts from my customer support team. We don't really do any kind of trial. The other idea there is you guys aren't trained on it. You don't know how to use it.

--- Implementation and ongoing support ends ---

BRETT

50:27 It's not gonna have any data in it. So, we found that people ask for that a lot but they never do anything with it. So that's kind of why we don't offer it. If there's some things specific that you guys wanna see. We can jump on another meeting to GA, and I can give you guys my logging credentials. I can talk you through it... but that's the only way we do.

CLIFFORD

50:51 Yeah, I think we take it from here is what, you know, I think you need to get back to us regarding the saved 300 integration here.

BRETT

50:59 We need to set up a call with Tonya. I can pull up her calendar. If you guys can pull up yours as well. We can find the time to do that. Certainly... right? Ton is.

KURT

51:11 PW. See this week?

BRETT

51:16 First availability Tanya has this next Monday morning. I don't know how Monday morning, but for you guys?

CLIFFORD

51:23 Sunday morning, no good.

BRETT

51:25 I figured how's Tuesday afternoon, three o'clock...

CLIFFORD

51:29 Good afternoon. The 20 second at three o'clock...

BRETT

51:31 Yeah... yup. And just note that's right before thanksgiving. So double check.

KURT

51:39 Yeah.

CLIFFORD

51:40 Yeah, we're about.

BRETT

51:41 Okay. So what I'll do guys is I will send you both an invite for the stage 300 scoping call. Are there specific things that you're looking to move over that I can talk to Tanya about before? I know you want the AI invoice. It sounds like you want time as well. Is there anything else?

CLIFFORD

51:56 Yeah, no, we're not crazy about time. We're really just looking for the, our invoicing over.

BRETT

52:01 Okay. Easy enough. Cool. So, let me talk to Tanya. When she gets back from this conference later this week, we will be ready for you on the 20 second at three PM. We'll discuss what that integration from service trade to take 300 looks like to give you guys the full picture at the end of that meeting. I'm telling you will be able to give you a price for the integration. I can give you a price per service trade and I'll put together a full proposal for you guys. Does that work?

CLIFFORD

52:24 Brett?

BRETT

52:25 Awesome. Well, cliff, Andrew, thank you for joining me. I'm gonna send you guys an email after this, with some information. You'll have my contact information. If you need anything between now and next Tuesday, give me a shout, shoot me an email, whatever works best for you guys. Yeah.

CLIFFORD

52:38 God, man, we'll talk to you then.

BRETT

52:40 Awesome. Thanks, guys. Take care.

CLIFFORD

52:42 Bye, bye bye.

The End