



# ServiceTrade Demo with Neelands USA

Brett Griffith with Neelands USA  
Recorded on 6/2/22 via Zoom, 1 hour 59 min.

## Participants

### **SERVICE TRADE**

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*Territory Manager*

Katherine Holden  
*SDR*

### **NEELANDS USA**

Patrick Sperduto  
*Florida Branch Manager*

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# Transcript

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

BRETT

0:00 Hey, good afternoon, Patrick and Jennifer. How are you both?

PATRICK

0:03 Alright.

BRETT

0:05 Awesome. I'm doing well. Thanks for joining me today, guys. My name is Brett Griffin on the inside territory manager here at service trade for the northeast. I know you guys are located in Florida, but HQ is in ontario, correct? Yes. Okay, cool. So, yeah, with the whole northeast thing, we, that service trade, we tend to work with you're. Gonna work with me, I'm in the northeast because we work with the headquarter office. I did want to ask you guys prior to us getting started if you guys were to make a switch on software, would it be company wide or would it just be the Florida location?

*--- Purchase decision ---*

BRETT

0:43 Okay, cool. So... to give you guys a little idea of how we like to run these meetings, I'm gonna start out by asking you guys some questions about your business really just looking for, hey, what you guys are working with today, where you guys are looking to be from there.

*--- Purchase decision ends ---*

BRETT

0:58 I'll give you a little background on service trade itself and then we will go ahead and jump into the demo. Does that work for both of you?

PATRICK

1:04 Sure.

BRETT

1:05 Right. So, I wanted to start by reviewing some of the notes I had here from both Billy and Catherine, the two people you spoke with prior to me... Patrick, it looks like you're the branch manager and Jennifer, you're the service operations manager... correct? Okay, cool. And now, so you guys are obviously a mechanical contractor

focusing on H back refrigeration... sounds like you guys have been dealing with some complicated processes as of late, maybe 18 months ago. You guys were on mobile tech and Great Plains and the idea with.

PATRICK

1:41 They're...

BRETT

1:42 Still there because you're three quarters of a 1,000,000 dollars deep and 18 months deep into an active America implementation?

PATRICK

1:49 Yeah.

BRETT

1:51 Let's talk about that. Is this something Patrick, where you're looking to stop implementing acu medica and find something totally new or yes?

PATRICK

2:01 Yeah. So actually America, obviously, it was a bad idea. I guess it works where they haven't flushed out, but between the front end and the back and they got so many things that they want to implement that into it that it's pretty much day. Like I don't even know words that we used to have weekly meetings and I haven't heard from him too much.

--- Accounting integrations ---

BRETT

2:26 Gotcha. Yeah, that's definitely not a good sign. What I'll tell you or what I know about actually medica. Yeah, man, it's a great accounting software. But realistically, it sounds like you guys are trying to use it for accounting and service and that's just not how software is made today. That whole all in one look. Softwares are really kind of a best of breed these days like service trade as a service software. Acu, America is an accounting software. When you try to use, when you try to run service out of an accounting software, there tends to be a lot of things that do go wrong and implementation.

--- Purchase decision ---

BRETT

2:56 So you guys are not alone in that, but either way, it's still kind of thought. One thing I do want to talk about with you is I know you guys recently looked into BuildOps and you kinda mixed that conversation because they didn't have a back end. Is that right?

--- Accounting integrations ---

PATRICK

3:11 Correct.

BRETT

3:12 Okay. So let me tell you a little bit about service trade. We are a service management platform here. Not gonna replace your accounting system. We do have the ability to send a, our invoices to the customer, but we are not a full financial system. A lot of times. What our customers do to option, they will use service trade on the service side and not connect to their accounting system or hey, we can connect to multiple different accounting systems. Great Plains actually, medical being two of those systems, they will integrate service straight into their accounting system.

PATRICK

3:44 Great planes gotta go. That's the whole reason for this stuff that I'm looking for something else.

BRETT

3:50 Okay. Yeah. So Great Plains gotta go. Is what I'm trying to get out here is actually America can't figure out service and accounting. Would you still be trying to get them to figure out account?

*--- Purchase decision ---*

PATRICK

4:06 I don't know.

BRETT

4:07 Okay. Let's...

PATRICK

4:10 I have not pose that question.

BRETT

4:13 Okay. So maybe that's something we gotta bring up internally. I'm really just trying to set the right expectations with you guys. I'm not here to waste your time or anything like... that. Being said, let's show you what we got with service trade and see if it's something that's up your alley.

*--- Purchase decision ends ---*

BRETT

4:28 So let's transitional a little bit more into your guys current process. So... it's salad or Billy told me that you guys are looking for pretty much everything across the board, scheduling, dispatching, quoting, invoicing service history, inventory,



profitability reports, deficiency reports. So all that's handled in mobile tech today. Give me an idea of what that looks like. I don't know much about mobile tech.

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

PATRICK

4:51 We'll take as a service software. You've got trucks, docs, warehouse stocks, inventories, service tickets, what do you call them? You can call him service tickets for appointments or whatever you wanna do, you know? And I mean, I know mobile take has expanded capability than what we use it for.

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

PATRICK

5:13 And I don't know if that's because you just never purchased the licensing or whatever kind of back end why she's involved in that. But that's about the end, right? So service timecard, mobile take. Also, I'm in freezer go for service techs which populate onto a time track for payroll this now. But mobile take service spectrum, right? So that leaves us where we do not have any kind of useful software for our Construction department, the forming to add their time and their teams time and their work notes on, you know, on a daily or weekly basis that doesn't exist. So, you know, we did want to, I know one of the points in it Frankie medical as they wanted to incorporate sort of similar process that the service techs years for the Construction department. So I think we can better track times and basically trip the task, right? So we spent three nine is running pipe. Why should have been a nine and a half, you know? So... and that one?

*--- Access to information ---*

BRETT

6:18 Go ahead. You go ahead. Sorry.

PATRICK

6:22 So, one of my big asks, so that's mobile tech. Now... Jenkins, Jen, is there anything I'm...

JENNIFER

6:32 No, keep going sir.

PATRICK

6:36 Okay. So, I know, so that, that's about it, right? On mobile tech. It does have a back end but we don't use it.

*--- Accounting integrations ---*

PATRICK

6:48 So I've gotten like reporting capability. Okay? And GP, Great Plains on the back side... you know, it's a, it says like, you know, Jennifer is like literally proficient in GP, and if I want to pull a profitability report, it takes general people three days to get me all the info... to being able to, hey, you know, how many service calls as this tech run, and what was the net profit in parts and this, and that, you know?

--- Accounting integrations ends ---

BRETT

7:25 Okay. Yeah. Tracking with you?

PATRICK

7:27 You know, reporting, right? Basically, they call it, what does it? What are they called? The KPI'S key performance indicators?

--- Assets ---

PATRICK

7:34 You know, it's just, I want to know how good my text you're doing, you know, how many call backs, what the profitability is by customer? You froze?

BRETT

7:45 No, I got ya.

PATRICK

7:48 Okay. I want to be able to pull profitability by customer by individual location and by technician. And one of the other things too is like problems or recurring issues or what we call recalls. You know, I'm currently mobile, there's no way to store equipment by location. So, you know, we'll work on a piece of equipment. Everything we touch has a model and serial number or a name of some sort, right? So, like one of the things I was asking for is like, well, if the same model and serial number in the same location gets entered to twice for more in the in, within a 30 day period.

--- Assets ends ---

PATRICK

8:32 Now we're giving free service. And I wanted some kind of like automated alert, you know, that we can add people to almost like a workflow or, you know, gears flow or something like that where if we're having problems, let's let the managers and supervisors know before we're 10,000 dollars and the whole three week, we're doing invoices, you know?

BRETT

8:52 Yeah. Yeah. I know exactly what you're talking about. It's definitely something I can handle in service trade that we're going to cover today. So I think you'll like that aspect of it, but you're giving me great information right now, Patrick, and you're

kind of helping me steer this demo of what I'm going to show you guys today... that being said, one thing I want to bring up is Construction.

*--- Type of work ---*

BRETT

9:12 You mentioned wanting to track the time for Construction guys, the similar way that you track for service guys, your guys, Construction project, how long are they taking?

PATRICK

9:23 Well, a normal, I usual project is about three months. Yeah. I mean even brand new stores are I think four, two, five months long?

BRETT

9:34 Yeah. The reason I asked that question, Patrick, is service trade itself. We're really good at service. Hence the name. I'm glad you're Construction projects are on average three months because we are breaking more into the world where we can handle project management. So I would say three months is perfect. We can handle that in service trade. But if you do have new Construction jobs, the end up taking a year or longer service trade is probably not going to be the best software to handle those.

PATRICK

9:59 So, would it be possible in those situations where you break the job into parks?

*--- Type of work ends ---*

BRETT

10:03 Yeah, you can totally do that on.

PATRICK

10:05 The right one job part to job for three and it's just three months sections. And that would have a software side only, you know, and I wouldn't affect the flow of the job. It's just...

BRETT

10:16 Yeah. So you're thinking about it the right way.

*--- Type of work ---*

BRETT

10:18 The reason it would wouldn't necessarily work for a really long Construction job in service trade is just tends to get a little clunky because it's made for service. But if

you were to do it with exactly what you just said, doing it in different phases, yeah, it would make things less clunky.

*--- Access to information ---*

BRETT

10:31 It would be a lot easier to manage and service trade, it wouldn't change the actual work for you would be tracking everything and service trade. So that would work.

PATRICK

10:42 The other thing too. And the last thing that I wanted to put in there it is. So mobile tech is for the most part user front, right?

*--- Access to information ends ---*

PATRICK

10:52 I mean, there is a little bit of training that has to go into it. But for the most, the guys can handle... you know, navigating creating their own service calls after hours, adding parts and feels when they need to. So one of the big things is it basically it needs to be like toddler friendly because the smartest service techs are they're not... and when you couple like lazy resistant to change and just for some weird reason, not the best, it savvy people in the world that can fix it for you.

*--- Paper process ---*

PATRICK

11:24 That's what we really need it to be at least have the technician field level. It has to be easy. It can, you know, a little more complicated on the back end is...

*--- Access to information ---*

BRETT

11:34 Cool. So we're built were built specifically for commercial service contractors. So that's the only technicians are the only people using our mobile application in that field. So we made it really easy for them to use because to your point, for some reason, yeah those text, you ask him to go fix a broken compressor, they'll do it in an hour, but you ask them to use the mobile app that's a little complicated.

*--- Access to information ends ---*

BRETT

11:53 It's going to be a little bit harder on them. So we were thinking about that when we did create the application and you'll see that today. But let me ask you this, Patrick, if I'm able to show you a way today that you can track your profitability reports by location, customer and technician.

--- Assets ---

BRETT

12:08 If you, if I can show you how we track time for technicians, show you problems that are recurring, you're like you said recalls as well as give you a way to track that equipment by location, all while being user friendly, do you have a time line that you're looking to get something new started? Or what's that look like for you?

--- Assets ends ---

PATRICK

12:29 Well, actually America was suppose to fire up a year ago. This meeting was actually referred to me by our wire by our VP of US ops. So I mean, I'm assuming that depending on how this meeting goes, I'm going to report back to him and the time line will really be between him and the Canadian operations guy.

BRETT

12:52 Okay. What is the VP of US off the same?

BRETT

13:01 And then, who's the operations guy in Canada?

PATRICK

13:03 I don't know general, probably knows counterpart in Canada.

JENNIFER

13:10 Well, it was gym at this point. I think you'd probably be Tom... alright?

BRETT

13:21 Just taking some notes here so I can refer to them as their names.

--- Purchase decision ---

BRETT

13:29 Cool. Okay, guys. So it looks like I have everything here. I'm going to give you a pretty high level overview of service trade today, but we're here to find a solution that's gonna work for you all. So if you have questions throughout the demo today, feel free to jump in.

--- Purchase decision ends ---

BRETT

13:42 Interrupt me. I'm here to be a resource for you guys. So jump in whenever like I was saying, is that cool?

PATRICK

13:50 Yeah.

BRETT

13:50 Alright. Alright. So let me just share my screen with. Yeah, we're going to jump into some slides and then we'll go right into the platform. Can you guys see that screen?

--- *Type of work* ---

JENNIFER

13:58 Okay.

BRETT

14:06 What's that?

PATRICK

14:07 Sort of course, it has to be costco.

BRETT

14:10 That's where we're working today. Do you guys do work with costco?

JENNIFER

14:18 Somewhat somewhat gotcha. Yes, we do.

BRETT

14:22 Okay. Yeah, I believe it was telling me it sounds like you guys are working with like a lot of shopping centers, grocery stores, things like that.

--- *Type of work ends* ---

BRETT

14:28 Yeah. Okay, cool. So, service trade. We are a service management program. This is designed specifically for commercial service contractors. We don't work with residential contractors. No one in like the past, controller landscaping space. We're dedicated to what you guys do and work specifically with people like you. As of today, we've got somewhere between 850 and 900 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. I didn't even ask you guys. It sounds like you have 11 service technicians in the Florida office. Do you know how many you have across all offices?

JENNIFER

15:13 I'm sure. We'd be in the hundreds.

PATRICK

15:17 Yeah, if you include candidates, it's monsters.

JENNIFER

15:20 Yes, yeah.

BRETT

15:22 Yeah. Alright. So like I was saying, hey, we work with people that size all the time... and really the goal of service trade is to help you guys grow the business. So that leads me into the, my mission statement which is the help commercial service contractors be more valuable to their customers. And at the end of the day grow their business. And you probably know this specifically for your branch. Do you guys have any growth?

JENNIFER

15:50 I'm sorry.

BRETT

15:52 Yeah, apologies, you guys probably are, the mission of service trade is to grow your business. You probably know this specifically for your Florida branch, but do you have any growth goals?

PATRICK

16:04 Yes.

BRETT

16:06 What's that look like?

PATRICK

16:09 Imaginations, the limit, you know... not really though the growth goal is to develop a customer base a big enough to allow us to build a strong enough service team so that we can, you know, truly become compact like one competitor in the state of Florida... to be, you know, on par with the big names that when you think commercial refrigeration in Florida, you know, they're the ones you've come say.

--- Type of work ---

BRETT

16:37 Gotcha. No, that's a good goal for sure. Want to be that big boy company. And you guys are pretty much on your way to doing that so far.

--- Customer engagement ---

BRETT

16:44 But let's take you through that next step. Okay? So another thing that we do it service trade is, hey, you guys are doing service, we do customer service. So essentially, we want to turn your cost per your service business into a customer service business. So your customers actually want to work with you guys at the end of the day. Your customers are the most important part of your business without them. You guys probably don't have job. So let's take care of them. So what we focus on there is what I like to call the age of online customer service guys. What I like to relate this to has, have you ever ordered something off? Say, Amazon prime?

JENNIFER

17:24 Yes.

PATRICK

17:25 Yeah.

BRETT

17:27 Why do you use it?

PATRICK

17:30 I don't know because they had when I was looking for, and one more thing.

BRETT

17:35 Okay. So it's convenient, would you say?

JENNIFER

17:40 Fast and efficient?

BRETT

17:41 Convenient, fast and efficient. That's kind of what I was going forward there. That is exact, that's the exact level of service that we want to help you guys provide to your customers in the mechanical space. Amazon completely changed the way they did business by engaging with their customers online. They are now one of the biggest corporations in the world that's exactly what we're trying to do for you guys. Yeah, you came to us looking to improve your service operations. A lot of times people aren't thinking about, you know, their digital presence or their customer engagement. But when people do come to service trade and they embrace that, they find that at the end of the day, they are increasing their revenue by engaging with their customers telling them a story of what they actually did on site. Does that make sense?

JENNIFER

18:23 Yes, that's also part of our goals, right?

--- Paper process ---

JENNIFER



18:26 So internal goals would be to have a system that is fast and efficient and simple if you will simplified. So that with the multitude of people that are working within it, the stop having so many issues.

BRETT

18:43 Exactly. I'm just writing that down. Okay. So some different ways that we're going to help you guys out.

--- *Customer engagement* ---

BRETT

18:54 First off, we have and route notifications. This is really that first touch to the customer, letting them know that your technician is on the way. The customer's going to receive a picture of the technician as well as their EPA excuse mean... next step, we've got online quotes. So like you said, you want your office staff and your technicians to be aware of recurring problem on pieces of equipment at service trade. We wanted to make it easy for our customers to be able to track what we call deficiencies, what you guys call recalls. So they're just other repair opportunities on site. So we make that really easy to do from the technician point of view. But we also make that really easy to turnaround into a quote for the customer gonna look exactly like what you're seeing on your screen. I know it's a little small right here, but we will go through a deeper in the demo. But probably the most important thing with these quotes guys, are these pictures customers today that are including anywhere from three two five pictures on their quotes and telling that story to the customer are seeing increases of 30 to 40 percent repair revenue year over year. This is really shifting the conversation from strictly the price to the actual problem at hand.

--- *Access to information* ---

JENNIFER

20:07 I have a question... is showing an iPad. So the text enough to have ipads for this to work or can they do it on their phone?

BRETT

20:16 I, any iOS or android device. So whether that's a phone or a tablet, you guys pick... great question. Next step. We've got service link is essentially a fully encompassing post service report that has the ability to go out to your customer after said work is complete.

--- *Customer engagement* ---

BRETT

20:35 So, I can tell that customer things like, hey, what tech came out? What did he do? What did you use? It can have any of my PM checklists as well as any deficiencies I found on site. So this really helps kind of stop your customers from disputing any invoices because you are telling them everything you did for them and everything they're paying for it.

BRETT

20:58 Second, the last year we have service portal. This is, this might be something you guys start with. That might be something that you guys grow into, but essentially something that could go on your.

PATRICK

21:06 Like real quick about the last slide. Yeah, yeah. So this is like tech notes and stuff that go right on a website.

--- Tech On-site ---

BRETT

21:16 So the service link, there can be notes from the technician. It's really just telling that customer what the actual job your technician went out to do was like in it.

BRETT

21:31 Get out here. Give me one second.

PATRICK

21:33 No, I don't know. I didn't know that.

BRETT

21:35 Okay. We'll keep rocking there. So, in this case, there were three services completed on this job that Johnny Mick technician. Did, he did H fact job in a kitchen appliance job. This is what the technician saw when he was on site to actually perform the job. Any notes from your technician can be included at the bottom of this and everything is going to have a toggle switch depending kind of what you want to show the customer versus what you don't want to show them.

--- Tech On-site ends ---

PATRICK

22:00 Okay. That's what I was asking because, you know, back to the good or service tech. Sometimes what they do is amazing. And then sometimes you read something, you have a brain and your...

BRETT

22:10 Yep. Don't worry, you guys are going to be able to review everything your technicians do before it goes to the customer.

JENNIFER

22:18 Sorry about that, that's...

BRETT

22:19 All good. Did I answer your question Patrick?

PATRICK

22:25 Yeah, thank you. I just want, you know, I'm you know, trying to double check hey some technical it's out goes out there and he's like, you know, I found it the drain flash and you're like...

BRETT

22:35 That's what it is.

--- Customer engagement ---

PATRICK

22:37 You know, and that shows up on your website. It's like, no.

BRETT

22:42 Exactly. And we're going to make it really easy for the text to be able to make you guys in the office aware of what's going on as well. So maybe if you guys are the ones sending out the service link, you can make some adjustments to make it a little more customer friendly.

JENNIFER

22:55 That sounds like a good idea.

BRETT

22:57 Yes, that's probably what 99 percent of our customers. So with the service portal, it's essentially something that could go on your guy's website where your customers can come in and log in and see the locations, use service specifically for that customer.

--- Assets ---

BRETT

23:13 So they can come in and see any kind of service history. If you guys are managing the assets, pieces of equipment inside of service trade. Like you said you are tracking, make model serial number. So it sounds like you will, customers can come in and see every single piece of equipment along with every single job deficiency or how you would call it.

--- Customer engagement ---

BRETT

23:31 Recall. We're quote found on those pieces of equipment. So kind of like a self service center where they can come in and find their information without calling you guys in the office.

PATRICK

23:45 I'm sorry. What was that license you said?

BRETT

23:48 The service portal is really like a self service center where your customers can go on your website and find any of the information they did for you. Did for them without having to call you guys in the office. So just saving time on both them.

*--- Customer engagement ends ---*

PATRICK

24:03 There's the are going see, I got an email from this hard mark thing and I thought that was shared with spam and the weekend.

BRETT

24:08 Yeah. Well, I was it before our last meeting.

PATRICK

24:12 It was in between our last meeting in this one, well before we just had, we had a phone call.

BRETT

24:20 Gotcha. I might have sent you like accidentally sent you like an end route notification, my father on that, but yes, our, of our service is just our dummy account that we use on demos.

PATRICK

24:30 Okay. Because I'm like I thought it was service trade. What the hell is aardvark you know?

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

BRETT

24:34 Yeah, you're gonna see that a couple of times today. I'm just know anytime you see aardvark, it's gonna say kneeland and your guys logo. But my last thing I have to point out here today is invoice link. As like I said earlier, we're not gonna replace the accounting system.

*--- Invoicing ---*

BRETT

24:51 We are not an accounting system. We don't plan to be, however, we do have this one feature that allows you to take payment via service trade. Our lot of our customers found that, hey, all their service information was already and service straight anyway, why not give them a way to actually in the customer and get paid. So that's exactly what this is right here. It's gonna have this little pay now button on

the invoice where customers can come in and pay you guys with the credit card with AC, H typically kind of depending on the direction you guys go whether use service trade as a standalone platform or connected with the accounting system, all this in from and stay in service trade work and move over to accounting. But I will tell you within voice link, customers do tend to see about a 15 to 20 day improvement in their outstanding a, are balance.

JENNIFER

25:38 So, they can access their own invoices through the portal that for them, that was on the previous page, can they access the invoice through their?

BRETT

25:47 As long as you send your invoice out via service trade? Yes?

BRETT

25:58 Do they?

JENNIFER

25:58 Have the option that they can pay online or they can continue to pay the delay, the been paying?

BRETT

26:04 I mean, yeah, if they don't wanna pay you online with this button, they can just call you guys in the office and take care of it that way, right?

PATRICK

26:09 So that's really cool though because that would give individual customers like Roxanna enormous paler. And, you know?

JENNIFER

26:15 Yes, yeah.

PATRICK

26:16 Admin option to just pay like that instead of mailing us check?

JENNIFER

26:20 Yes.

BRETT

26:21 Actually call comes back to making it easier for your.

JENNIFER

26:25 Yep. Less trips to the bank Patrick.

--- Invoicing ends ---

PATRICK

26:28 Yeah, definitely. Well, I mean in, you know, in reality, you know, they say, you know, it's easier for your customers, stuff like that, but that's more along the residential line. I mean, if you look at service in costco and whole foods and, you know, trader Joe's and they have established processes that they're going to follow.

--- Customer engagement ---

PATRICK

26:45 So, but when it gets a little one off customers. And yeah, this definitely makes it easier. You know, they get a receipt immediately, you know?

BRETT

26:54 Yeah, exactly. And then, yeah, all that information in their portal. So they don't even have to save everything. They can just log in there and have everything that they need it.

PATRICK

27:04 And how did they do that? Is that something they have to like register and we approve or something like that?

BRETT

27:10 The portal here? Yeah. So you would provide all of your customers with logging information, and that's something we would help you guys get set up during the implementation process.

--- Pricing ---

BRETT

27:22 Talking about the implementation process. The max time your implementation would take would be 120 days to four months. We're not going to get anywhere near that 18 months you guys are dealing with today?

PATRICK

27:34 You guys aren't trying to rebuild software to service freaking magicians. And with...

--- Customer engagement ---

BRETT

27:41 Exactly, right. Cool. So guys, everything I've pointed out today, they've helped our customers significantly increase their revenue. On average. Customer saw about

a 23 point four percent increase year over year. I'm in the revenue. What would this kind of increase mean for you guys or at least the Florida branch?

*--- Pricing ---*

PATRICK

28:04 23 point four percent increase in revenue would be?

PATRICK

28:12 Probably around three 400,000.

BRETT

28:16 1,000 like that. So, I mean, number one pay that's gonna pay per service trade. But number two, that's also going to help you invest more money in your business at the end of the day. That is service trade.

*--- Purchase decision ---*

JENNIFER

28:27 Cool. That was my next question is how much does all this cost?

BRETT

28:32 Yeah. So it's kinda hard to give you some pricing without going through the meeting and determining what you guys need. I will tell you pricing is right on our website. There's three different pricing tiers, but I'll be able to give you a better idea after the meeting.

*--- Access to information ---*

BRETT

28:44 Cool. So that being said, let's go ahead and jump in here. Unless you guys have any other questions prior to us getting?

JENNIFER

28:52 Hello?

BRETT

28:55 All right. So, guys, the one thing I haven't pointed out as far as service trade to say 100 percent cloud based system. All I need to access it from the office is internet access in a browser. All my technicians need like we said before is any kinds of iOS or android device service straight from the field is an application they'll download from the app store, and they will log in with the credentials provided. So the very first thing that you're gonna see in service trade is going to be the service dashboard really going to give you guys visibility into your day.

--- Access to information ends ---

BRETT

29:25 So telling you, hey here's your different technicians with the jobs at the respective locations they're going to for the day. But as I scroll down the screen, these buckets are also going to give me the status of my jobs. So if I do have anything overdo, no appointments on the calendar. Hey, we're letting you guys know front and center that you need to schedule this and get out to the customer. So you can do get paid.

PATRICK

29:47 How does that get into that? Where do those, where does that come from?

BRETT

29:51 Yeah, great question. So you guys do a lot of preventative maintenance, right?

--- Recurring maintenance ---

PATRICK

29:56 Yes.

BRETT

29:58 Is, is that on done on a recurring basis?

PATRICK

30:01 Yeah.

BRETT

30:02 Cool. So when you put your jobs into service trade, you're gonna have the ability to put them in on a recurring basis. All the jobs, all 41 jobs in this bucket right now, they were, hey, do by the job or the date on this screen right here. So we put do by on whatever recurring basis into service trade technologies tracking it. And when it gets to that due date and it's overdue that's how it comes into this bucket. Excuse me. Makes sense?

PATRICK

30:34 Yeah. And so another thing we were gonna use this, well, we or whatever we end up with will be used for service in Construction and then controls.

--- Accounting ---

PATRICK

30:43 So the job numbers over there, are there ways to distinguish like right now we use for example, a job number would be the year. So like wanting to dash. And then



the job number is zero zero one four. And then like see US is Construction US or US, MS, U. SS, U. S, a service US, but, you know, job numbers versus service ID.

BRETT

31:10 So you have the ability, this, the job we're looking at right here, a work order, you have the ability to put it in external ID'S if it's something we ended up connecting with the accounting system you guys are using. Yeah, we could probably do it in the way like you said US service, Canadian service. But the other thing I'm thinking of here is these job numbers are given to you by service trade. Every single job number is going to be unique across all of our customers. The reason for that is if you ever have a problem with this specific job, you call us, you tell us this job number right here we go and fix it. Access makes it really easy for us to find it. Whoever the other thing I'm thinking of right here is with job type, you can kind of pick whether it's a service call, Construction job. From there. It might be a matter of coming in and tagging it as US or Canada?

JENNIFER

31:59 What about so to add a Patrick question? So we have service ID'S and jobs. And the differences is the service ID is basically a service call to the customer and the job would be like a project or an install or, you know, a large prepare that we're doing. Do you have to separate? You know, like we couldn't call everything a job, we can call, everything is service ID or service call. So, is the, is there the option to have both in the system?

BRETT

32:31 So these are all the different job types you can have in service trade. I can send you guys a copy of all these different job types as well. After our meeting. I do on, no, no, there's no option to put anything new in. It would be a matter of us talking to our service team and determining if they could put it another job type in here.

*--- Accounting ends ---*

BRETT

32:50 The important thing to keep in mind is if they change something for you, it's going to affect all 900 of our customers.

BRETT

33:00 My best recommendation for you all with a lot of our.

PATRICK

33:06 Would it be possible if instead of job type, you put a job sub type and you just leave it as a text box?

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

BRETT

33:14 No, you have to pick a type of job. It won't let you create it without doing this, you can do.

PATRICK

33:19 I have job type, right? But what I'm saying under job type in between job type and Bill to you have a job subtype that would only open up if you pick on, no.

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

BRETT

33:31 That's not something we can do today, but it's something I can ask about for you, but.

PATRICK

33:36 Yeah, I don't expect it to be like, you know, snap your fingers, but, you know, you said we make a change for us, it will affect all 900 of your customers. But if you add that, like if you pick unknown and it pops open a job subtype that well, I don't think that will hurt any of the other 900 customers in may even help with you.

BRETT

33:55 I see, I understand exactly what you're saying and what I'm doing, Patrick. So I'm just gonna write that question down. And after we jump off our meeting, all reach out to support and see what that would look like if it's even possible.

PATRICK

34:06 Yeah, it's possible, man.

BRETT

34:09 I know it's possible. It's where they do it.

JENNIFER

34:13 Just saying to Patrick. If you actually saw some of the drop-down I mean, we could work with it, it's Scott priority call, urgent call, service, call, Construction repair.

PATRICK

34:23 Yeah, I did. I was looking.

JENNIFER

34:25 Hello?

PATRICK

34:25 Hi, may.

JENNIFER

34:26 Could we could figure it out? We just have to internally have rules to what we choose for each one or more depending on what we're setting up.

PATRICK

34:36 No, yeah. I fully understand that. And, you know, I also understand, you know, the impact and relevance of a drop down list versus free text. It's all, you know, management. If you have free text and someone here's this capital or someone else doesn't you're gonna end up with two jobs that are the same thing because they just started.

JENNIFER

34:53 Yeah.

BRETT

34:54 Exactly. So, yeah. Like I said, I'll reach out to them once I get an answer, I can send you an email with any updates or I can bring it prepared to our next meeting if we have.

--- Recurring maintenance ---

PATRICK

35:06 Alright.

BRETT

35:08 Or on this job page, let me show you how everything's stored in service trade. So, we are built like I said, strictly for commercial and industrial contractors. So, how everything's going to be setup? Is you're going to have your ship to information on the left with your Bill to information on the right? It sounds like how majority of your guys customers are setup, right?

BRETT

35:29 So, I mean, this, okay. Well, for example, you do work for, you? Said trader joes earlier, you do work for multiple trader joes?

PATRICK

35:39 Yeah.

BRETT

35:40 Okay. So when you send the Bill, do you send it to trader joes corporate?

PATRICK

35:46 Hi, yes. But like, so what Jenkins speak to this a little bit to work specifically since you're on costco, because we also work for costco, some of costco as billing goes

through the warehouse, some of it goes to Patrick. They'll incorporate like... so some of the costco clubs you will just build a corporate and, but then some of the jobs that we do for them, they built in the warehouse.

BRETT

36:11 I've got ya. So that can be changed. I just got to find the spot where it goes. But how service trade is going to be set up is kinda depending on the situation you guys have whether it's going to the warehouse or whether it's going to corporate. The Bill to is going to be where the Bill is going to the ship twos or the different locations you deliver service that. So if costco rallies go into the warehouse, the Bill to in the ship to we're going to be the same. But for the rest of the six of these, the Bill goes to cosco corporate headquarters. That's how it's going to be setup. Does that make more sense?

PATRICK

36:44 Yeah, I got you.

BRETT

36:46 God. So what I pulled up here today is cosco wholesale rallies. Since that's where we're working, Patrick, I put your contact in here. I'm going to track every contact at this location, whether their management onsite financial, whatever it may be. But you asked earlier how these, how those different jobs get into service trade?

--- Assets ---

BRETT

37:05 And they're going to be here under services. So services, anything you actually delivered to the customer. So whether it's repairing a deficiency or it's recurring work, we're going to track that right here. So let me go find a refrigeration job. For example, this all of this verbiage right here is going to be the verbiage that your technician sees when he's in the field actually performing the job, you're going to be able to tie the services to the individual pieces of equipment which we call assets where you're gonna put that make model serial number.

--- Recurring maintenance ---

BRETT

37:33 So everything's tracked and service trade. And then you're gonna put the recurring basis that you go out just to do the service for the customer. So this one's quarterly service trade reminds us every single quarter that we have to go out and perform this service for cosco wholesale route. Does that make sense?

--- Recurring maintenance ends ---

BRETT

38:02 You with me?

JENNIFER

38:04 Hi, I'm still here. I'm not sure if Patrick guy, he might have been disconnected or he might be frozen.

BRETT

38:11 It looks like he's muted. Maybe he's on the phone?

JENNIFER

38:14 Yeah, he might be on the phone. He might have had to take a call.

BRETT

38:19 Should I wait for him? When do you think?

--- Recurring maintenance ---

JENNIFER

38:21 Yeah. Yeah. Let's do a minute.

BRETT

38:27 Hi, Jennifer. How do you, how do you currently track PMS today?

JENNIFER

38:32 So our POS are entered into our system like a contract. So we have to set up the contract in the system and we basically can customize it to, you know, whether it's monthly quarterly annually or by monthly, that we can change when we want visits to be. And when do you want the billings to come out in the system at the beginning of every month? I, you know, I go in and I let the system know. I wanted to auto generate, you know, the PMS that are due for that month and it will split them all out in the form of a service call. And then I did the same thing when I want to Bill sale, you know, generate what we are building this month and it'll spit out all the invoices that needs to be sent out for that month.

BRETT

39:26 Yeah, cool. Thank you for explaining that. I think you're gonna like what I have to show you because it's very similar to what you just explained to me.

JENNIFER

39:35 And just so I understand the, what are we looking at right now? These are all the calls outstanding.

BRETT

39:42 Yes, apologies. So we're currently on a location page, a location pages, essentially the record of truth for your customer. So these are all the different services that we provide for cosco wholesale of Raleigh.

--- Assets ---

BRETT

39:55 So I've got a bunch of different H fact services. I do on their rooftop units. I've got some refrigeration services, some electrical work in here as well. But these are also does that provide?

PATRICK

40:08 This... yeah, I mean... so I'm sorry for interrupting, but why do you, why do you have like five little calendar is over there with blue? Yeah, man and I'm just seeing things.

--- Assets ends ---

BRETT

40:21 Yeah. Let's talk about that. So I'm glad you're back. Let me pull back up something and explain it to you. So right here, we have a refrigeration service. Again, this is all of your guys verbiage that goes into service trade. This is what your tech sees when he's in the field with the services.

--- Assets ---

BRETT

40:38 You're going to have the ability to tie them back to the pieces of equipment that you provide the services on. For example, this carrier free is master system you guys are currently tracking, you know, the make the model serial for that. We're going to cover this in a second.

--- Recurring maintenance ---

BRETT

40:51 And you gonna put these services into service trade on a recurring basis that you go out. So I'm gonna open this up. And if you guys focus your eyes specifically on these two tabs right here, how large is the services scheduling window? Do you have to get it done today on June second? Do you have the whole month of June to get it done? Or is it a custom date range? And then how often should this service occur? I hit monthly and I hit every three months, meaning this is gonna repeat quarterly on the fourth Friday of the month. Does that make sense?

PATRICK

41:24 Yeah, it makes sense.

BRETT

41:25 Then to answer your question, Patrick, these are just for example, this one was set up in a way up. I have the single day to go out every three months. That is the day I'm going out in this case or let me take this case. I have the whole month to go out on a quarterly basis. Just get it done sometime in that month.

PATRICK

41:42 All right. That makes sense.

BRETT

41:44 Yep. Cool. So under services, we're going to have those assets I was talking about, those are those pieces of equipment. So, for example, this industrial refrigeration system, we can track as much information as you guys have right here. So I might not have everything filled out. You don't have to have everything filled out. But the reason that we track these assets inside of service trade is to give you guys some really Rich service history, but also to help you guys better understand, hey, how many repairs have we done to the refrigeration system over its entire lifetime? I can click into these assets and see everything I have ever done to it. So we provided these services on this piece of equipment jobs, our work orders. So here's every single work order that we actually did. But then I'll be able to see any deficiencies. So I found a bad compressor back on March 16 2021. If I have for bad compressors, I would be able to see that all under one asset. Is that kinda what you're looking for?

PATRICK

42:48 So, yeah, I mean... I think we can actually do that now. So more what I was talking about this, right? So... when a technician goes out to a call, right? Their location and they have to put the model and serial number of the piece of equipment, they're right? They're working on, right? Yup. Once they do that model is your number should be saved to that location as an asset, right? So then the next time, hey go out, when they go to enter that model and serial number of that same piece of equipment, it should auto populate because it's already been entered. And if they do work on that same exact piece of equipment twice within 30 days, that should trigger... that should trigger some kind of have a notification alarm, email bell and whistle, whatever you wanna call it so that a supervisor or manager can identify that we're working on the same piece of equipment, more than once in our labor warranty period.

BRETT

43:53 Yeah. So I totally understand what you're saying it's going to be a little bit different with how service trade works. You know, how you're saying your technician enters the model and serial number from the field. He's not going to have to do that because every service in service trade is going to be tied back to an asset. So that's already in there for him. He knows what piece of equipment he's working on. The only thing I can... you guys put them in. You said you were already track and make model serial. You guys are gonna put them on during implementation?

PATRICK

44:20 So, we have make model and serial on a bunch of it. There's we don't we currently do not have a list. I'm sorry, I'm finding that was misleading, but... we, yeah, we don't have an inventory of all of our service locations by model and serial number. I wish we did, but we know, so this is something that the technicians are going to be building as they are doing PMS and service.

BRETT

44:46 Okay. That's not a problem either because your technicians do have the ability to add these assets from the field. And to your point, it is going to save that asset in the system. So the next time your technician goes out there, he knows that he's working on that polar freeze unit or whatever it was, and he knows what happened to it.

--- *Deficiencies* ---

BRETT

45:02 Last time. Patrick, the only thing I can't do for you is I can't send off an email notification to let you know that you've worked on this twice in 30 days. However I will display that information. When a deficiency is created. It will show you related deficiencies that happened on that same piece of equipment over its entire lifetime.

--- *Quoting* ---

BRETT

45:20 So the person who is reviewing that is going to have visibility to see, hey, did we find another deficiency in the past 30 days? This is probably something we need to look deeper into.

PATRICK

45:33 Okay.

BRETT

45:35 I'll be able to show you that once we get to the quote?

BRETT

45:41 So that being said, the last thing I want to show you guys on this page is contract.

--- *ST app contracts and pricing* ---

BRETT

45:45 This is not the individual maintenance contract you have with your customer, however this is different pricing contract. So for you guys, do different customers of yours, you know, trader joes, costco, do they receive different pricing structures?

JENNIFER

46:02 Yes, depending on the customer and you know, it, sometimes labor rates and things are negotiated or they're you know, different as different end customer specific.

BRETT



46:14 Yep. So that's exactly why this was created. You can have different mark up rules for different customers or it can be individual items priced out. So maybe it's hey, parts and labor zero to 50 dollars, our markup 100 percent, 50 dollars and one cent to 100 dollars. I'm a couple of 75 percent. So on from there or those individual line items priced out, you'll have the ability to default these to your customers. So when it comes time to quote them or to invoice them, the proper markup flat markup rules apply to your guys unit costs, giving you your customer price.

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

BRETT

46:50 Questions?

PATRICK

46:56 You, did you, I'm sorry. Did you have one in there that was related or no?

BRETT

47:01 I haven't gotten to that portion that we're going to get there shortly.

PATRICK

47:04 Okay. Alright. We're good. I'm good here.

BRETT

47:07 Okay. So I'm actually gonna take you back to this preventative maintenance job.

--- *Deficiencies* ---

BRETT

47:11 What I'm gonna do is I'm gonna show you this work order from the office. I'm they're going to go out to the field. The, your technician do a couple of things. We will then do a quote or a deficiency in a quote so you can see the related deficiencies thing. But then we'll go through an invoice, the job, does that work?

--- *Purchase decision* ---

PATRICK

47:27 Yeah, that's fine.

BRETT

47:29 I didn't even ask. Do you guys have a hard stop time wise?

PATRICK

47:33 I mean... no, I mean, do we, generally, do we have another?

47:40 I don't think so.

BRETT

47:43 So, I promise, I won't take too much of your time guys, but I might go over the hour that we had today if that's okay with you.

--- Tech On-site ---

PATRICK

47:50 Yeah, I think that's all right.

BRETT

47:54 Alright. So let's go ahead and jump in here. So what we're looking at right now is a job, a work order inside of service, street job and work order mean the exact same thing. So, what I set up today is three different refrigeration services that were performing on site today.

--- Recurring maintenance ---

BRETT

48:06 They have to all get done sometime in the month of June. So that's why I put three of these on the work quarter. I don't want to send my technician to costco three different times. It makes the most sense to put these all on one work quarter. And the way these are broken down is what we call service granularity.

--- Quote templates ---

BRETT

48:22 You have the ability to tie your different parts, labor, item attachments and comments to the individual services at hand. You want to know what parts you use the job, or what job use the parts on, right?

BRETT

48:39 Right. So as I scroll down, I'm gonna have a list of all my parts, my labor, my items, you can see they are broken up by service here.

--- Tech On-site ---

BRETT

48:45 These are items that were initially on the ticket from the office. You know, you're gonna use these. Your technician does have the ability to add more from the field later on. So the one thing I'll point out here before we go out to the field is comment, comments can be left for technicians in the future.

--- Assets ---

BRETT

49:01 Comments can be left specifically on this job. It can be technician jobs or notes, scheduling, notes, or billing notes. So we know that, hey Jay left as the comment. The gate code is 87 65. When my technician gets out to, he's gonna see this comment. So from here, I'm gonna take you out to the field.

--- Tech On-site ---

BRETT

49:20 I'm currently on an iPad today. So first thing your technician is gonna do is actually clock in on site. I actually already did that. So from there, he's gonna figure out what are you actually ask, perform today? Onsite? He's gonna find that under services, he's gonna see those three different services that I set up on the work order for the technician to do.

--- Access to information ---

BRETT

49:40 And depending what you want your text to see if you don't want them to see maybe estimated price that can be turned off, everything and service traits, permission base.

BRETT

49:52 So...

PATRICK

49:52 This is like the view of the mobile app.

BRETT

49:55 Yes, this is exactly what your technicians are gonna see. So we break it down and we try to make it really user friendly to give them these different tiles as far as what they need to do. So services, this is what you're doing today. Attachments take some pictures. So going into that, a lot of our customers today are taking before and after pictures to share with the end customer, the work they actually did for them.

--- Deficiencies ---

BRETT

50:18 So whether it's taking a before and after, we're just taking a picture of something that's broken and sharing it. It's really valuable. So I can take as many pictures as I want right here. I can also do videos. I can also do audio recording... but moving down to job items, your guys in the field are going to be able to see that.

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

BRETT

50:37 Hey here's all the items that were initially on this, take it from the office. However if they do need an it's something to this work order, they can go ahead and add a part in how it's gonna work because they're gonna select this button right here. This is going to be your guys part list and service trade.

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

BRETT

50:51 So as they start typing up top, it's going to narrow down this list for what they're looking for. So I'm looking for a widget today. I used three of these things in my case, as a technician. I don't have access to pricing that's why this doesn't have a price here. Again, that's a permission based setting. So if you want text to see pricing, this will automatically pre-fill if not you'll see what you're seeing here. But then I can come down and source this part out to where it came from. So if I got this from a vendor... essentially, we can pull all of your guys vendors into service trade.

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

BRETT

51:25 So I'll say acme, we can put the po number in and how are you guys doing po is today?

BRETT

51:35 We...

JENNIFER

51:35 Generate them in the system?

BRETT

51:38 No.

JENNIFER

51:40 No. And GP.

BRETT

51:43 Okay. If you guys get off the ground with actually medical on the accounting side is the goal to create.

JENNIFER

51:53 Well, the guys can create po is for mobile tech just needed, but we mainly do it for them just because you know, of all the issues if they put in the wrong item right now creates a lot of work in the back end internally. So the office has been creating the fields for them. Okay?

BRETT

52:14 So that's a process that a lot of our customers take as well. Native service trade guys. What we're looking at here today does not have the ability to create a purchase order numbers for you guys. However, what our customers are doing today is they're coming in here and under the po number, they're actually writing the last four of the service trade job number so they can come in to 41 29.

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

BRETT

52:39 That helps reference those parts back to the job it was used on. I will point out like I said, native service trade does not track inventory. We do have another product in our suite of products called parts ledger. It does track inventory. It's a po generating software and it works with service trade. It sounds like you guys track and store inventory, is that correct?

JENNIFER

53:02 Yes.

BRETT

53:03 And is that both at the truck level and the warehouse.

PATRICK

53:06 So... we have an inventory in our warehouse... and then the way the new ones has it set up currently is every truck as its own warehouse, dumb, but that's the way to, I guess that's the way the system or small person that it. And we've just never been able to break for you there.

BRETT

53:30 Yeah, understandable. So if it's a matter of you guys wanting to keep it that way, we can work with that parts of your application that would require another demo with you guys with the parts ledger team. That's not something I can personally demo, but I want to point out, hey, you guys gotta like service trade first. So if service trade looks good and it's something you want to bring to your higher ups and we can talk about bringing in parts ledger and seeing if that's a fit as well... that work.

PATRICK

54:03 Yeah, that's fine. I mean, I, so I'm not, you, can you, I'm not... super well versed on the back end of the parts, I know how to get a po.

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

PATRICK

54:13 I know how to build a po, mobile tech, but yeah, I'm not super hip on the back end of that.

BRETT

54:22 Yeah. And that's understandable. And like I said, we're trying to make sure service trade itself. Native service trade is a good fit that's what today's meeting is all about. So let's not get too much into the weeds about that. However down the road, we will have to pull in people that are more well versed with the po process. So we can go through that, explain what that's gonna look like.

--- Deficiencies ---

BRETT

54:47 But the whole idea here is technicians do have the ability to add in parts from the field. So my last step here is all mark the status and I'll say this part was received. But Patrick you brought up adding assets, how your technicians and might have to be building this out from the field, that is possible.

--- Assets ---

BRETT

55:04 And that's what a lot of our customers do because a lot of them don't track assets prior to using service trade. So right here in this assets tile here's, the piece of equipment that we're working on today. Number one, I can click into this piece of equipment and see all the information I know about it as well. Let's see any service history. So here's every single work order that I've done at costco, Philip Raleigh on that industrial refrigeration system over its entire lifetime. So as the technician, I can scroll back to let's say April 20 second 2021 and see what actually happened here. When my technician was that location.

--- Deficiencies ---

BRETT

55:39 So I can scroll over and see it looks like Chris and J, where the tax? What did they do on site? They did both H back end refrigeration service? Did they take any pictures? It looks like Jay took a picture from the field right here. But lastly technicians also have the ability to see any deficiencies that have happened on this piece of equipment. So it looks like we just have that bad compressor back on 316.

--- Assets ---

BRETT

56:09 Do you, do you guys think that providing your technicians with this level of service history? Would it be beneficial for him?

PATRICK

56:17 It would definitely be beneficial especially if they're working on something that's already been worked on. So like if you go out and you find you have a bad thermostat and you can look at the service history and you see that the thermostat has been replaced three times. Maybe that's not a problem.

BRETT

56:31 Hey, exactly. Right? That's just telling your guy like, hey, let's start putting a band-aid on it. Let's figure out the root problem here. But to answer your initial question, if your technician does have to put these assets into service trade, he's simply going to come down here to add an asset, select the asset type. We're gonna let's go with refrigeration today. He's gonna pick whatever wanting us to pick from here. And we have all these asset types and service straight. If there's an asset type that you guys need that's maybe not in service trade, that is something we can enter in for you guys. Again, that's something that's gonna affect all 900 customers. So it's probably in here if you need it, but your tech and go through, fill out all the information they have. Maybe they just have the manufacturer, the model on the serial number great, put that into service trade hit save that is going to create another asset inside of service trade for you and it's going to be in there for life.

--- Assets ends ---

BRETT

57:25 That makes sense. Patrick.

PATRICK

57:26 Yeah. I did see. So one, when you were going through something a little bit earlier, there was like a deacon permission or deactivate. So it's like if you change our case, you can just deactivate it and it just goes away or become invisible. Or so I'm like really good at building stuff like this. Not sharepoint. So I like the way I do it in sharepoint is that I would, you know, you would just change the view, you know, maybe an act of assets. And if you as soon as you mark something deactivate, it doesn't go away. It's just no longer visible. And then she switched to the.

--- Assets ---

BRETT

57:58 Yep. That's exactly how service trade works. So if you guys pull out an app that from a piece or a customer, you still want that history and service trade, but you simply make it inactive, it's still going to be in service trade, it is going to be labelled as an inactive asset, but you're gonna be able to see previous history on it?

--- Assets ends ---

PATRICK

58:19 Alright. That's cool. That works.

BRETT

58:21 Perfect. Now, your text in the field, are they filling out a good amount of PM checklist?

PATRICK

58:33 So they did, right?

JENNIFER

58:37 But the...

PATRICK

58:37 Say the service software can handle?

JENNIFER

58:40 Yeah, exactly.

BRETT

58:42 I think I'm about to say that Patrick.

PATRICK

58:44 Hello? What I've had to do, drum roll in pain.

--- *Forms* ---

PATRICK

58:49 Hey, what I've had to do is I built the PM lists in smart sheets, linked it to a PDF, and then put that embedded that link into a button on sharepoint with an auto return. And that's how I'm currently handling the PM for... works. But, hey, every single time I have to set up a new one, it's like a day and a half of back end work for me to make it a seamless button, click for a tech.

--- *Forms ends* ---

BRETT

59:26 I can imagine how you started that off with the pain and then ended with the pain. That sounds like a lot of them. Let's make your life a little bit easier if you're making me laugh day. So I definitely appreciate that. What your technicians are gonna do is they're gonna come down here to be more detailed, gonna do exactly that.

--- *Forms* ---

BRETT

59:44 Just show him a little bit more information. And so from here, once this loads, they're gonna come up to action and go download like paperwork. So how this is gonna work is we are going to pull your guys PM checklist into service trade. We are gonna make them billable PDF. The correct form is going to be dispatched to your technician depending on the service they're doing. So this is my demo account. I got dispatched all five of these. But if I'm doing a refrigerant service where I need to track refrigerant, only this form is going to be dispatched to me. So your technician knows what he has to fill out. He's gonna hit generate. What that's gonna do is open this form up to Adobe acrobat, to free app, enables us to smart fill these forms on site. So I'll open it up for you and show you exactly what that looks like. So when I



say smart fill that form, all this information, for example, the asset as well as all of this information on the left hand side pre-fill then we don't want your technician to do all the admin work on site. Is there to do is, you know, refrigeration are H, back job. He doesn't want to be typing in tease form. So let's make his job a little bit easier by providing that already on there. But this is available document. So it's going to be your guys form. It's gotta be a little bit different than what you're seeing today. But depending what your form looks like, whether it's checking off the boxes or whether it's writing and information, this is how your technicians are going to fill it out... and maybe it's free form, come in here and put test whatever I need to do. How does that compare to the current process today Patrick?

BRETT

1:01:21 Yeah.

PATRICK

1:01:21 So...

JENNIFER

1:01:22 To awesome.

PATRICK

1:01:25 I have one question. So... I have like, so the fresh market, right? That's one of our bigger customers. And for where we have a customer, we have more locations. They're Pam form is a great tragic. It really is. It's a, it's like five pages, different format. You know, there's different formats between the first three pages and the fourth page. I've tried 100 different ways to convert that into an editable PDF and I just have not been able to get it to work. Okay? To the software engineers, a smart sheets and they were useless. I, you know, I talked to Google forums and I can do it in Google forums and I can do it in smart sheets to, but they're PM form is so complicated. You know, they'd be like it would be a multi day events for me to get that to work. Is that something that you guys could possibly potentially incorporate?

--- *Forms ends* ---

BRETT

1:02:38 100 percent. So you got two options on. This is what we're looking at right now. We come up like paperwork. Hey, yeah, you guys are more than welcome to create these yourselves internally. I've created a few myself and they're not hard to do by any means. They do just take a lot of time.

--- *Forms* ---

BRETT

1:02:52 I know that's not something you necessarily have. So if you want my team to take care of these syllable PDF for you, we will do them for you at 149 dollars per page.

PATRICK

1:03:05 Okay. Yeah. What's our current cleaning? What's our current? The first, do you have, do you have an actual copy of a real Pam form? Not the PDF one that I mean?

JENNIFER

1:03:21 What do you mean for the fresh market?

PATRICK

1:03:23 Yeah, but an actual Pam form not?

JENNIFER

1:03:28 Yeah. You mean like from them? Like the one that they want us to fill out? Yeah, I can find it. See. What would you like me to do it at once? Like Robert here, Patrick?

--- *Forms ends* ---

PATRICK

1:03:45 Maybe we can share it... with Brett, or maybe we can just email it to them. I don't know how it would be easier break and we can, she just share her screen real quick so you can take a peek at it.

BRETT

1:03:58 Yes, your screen?

JENNIFER

1:04:00 You bear with me. I got assigned at first. I'm looking for right now.

PATRICK

1:04:05 My God.

JENNIFER

1:04:10 On... I think I've got one here, Patrick. Hold on.

PATRICK

1:04:16 Okay.

PATRICK

1:04:21 I got it. Actually.

JENNIFER

1:04:23 Got it. Okay.

PATRICK

1:04:24 Yeah. Alright. Let me pull up real quick. I'll just go ahead and share my screen. This one... this is a little different than. Okay. So here we go. Okay.

--- *Forms* ---

PATRICK

1:04:41 Let me know when you guys can see that, right? Got it. So, when I've used Adobe is or nitro is conversion that first column here under our to you one, that is the only column that it picks up... the auto format. So that means I have to individually create... or check boxes for all the rest of this nonsense, right? Yep?

BRETT

1:05:07 Hello?

PATRICK

1:05:08 Hi to incorporate into smart sheets. What really kills me incorporating and then smart sheets is let me see. Hold on. Let me get to it.

PATRICK

1:05:23 There's one, there's one page in here. You can see, obviously, there you go. That one right there, this destroy this page district process. Even if I rotate this page left and do it like that, this page destroys the entire process of converting. This document is destroyed.

BRETT

1:05:48 Because it's a different format than the above.

PATRICK

1:05:50 Yeah. Yeah. The auto format has a manager heart attack and game over, which means I would need to... box by box, create a 14 page billable PDF.

--- *Forms ends* ---

BRETT

1:06:05 Yup. And that's why we charge 149 a page to do it. I've got, you know, guys on the service team that this is what they do every single day. They're really good at it, and that's why we charge what we do because it's a very time consuming process.

PATRICK

1:06:20 Yeah.

BRETT

1:06:22 So, the options there, we can do it for you guys. You can do it in house. I can send you a video on how we would do it if you don't want to pay for it. But the option is there is the most important thing?

PATRICK

1:06:32 Yeah. Okay.

--- *Forms* ---

BRETT

1:06:36 Hi. So once your text are done with this form on site, all they have to do is simply add it back to service trade. And so because Adobe is connected to service trade, we're just gonna come in here, just send a copy. It's gonna do its thing and we're going to simply add it back to service trade.

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

BRETT

1:06:52 So because we are clocked in at costco wholesale, Raleigh service trade knows that it's gonna attach it automatically to that job for us. So if I were to hop back to service trade, that PM form that we just filled out is going to be both under attachments and paperwork. You can see both those loading symbols right there. And it's the second one right here. You're gonna see this when we get back to the office as well. But from there, let's say your technician was, you know, doing a PM for him and he noticed a problem on site. How would he report that back to the office today?

--- *Deficiencies* ---

PATRICK

1:07:32 I'm sorry, say that again.

BRETT

1:07:33 Yeah. So say your technician is filling out a PM form for costco. He noticed is something is wrong. You know, as a service that's bad, the compressor, it's broken. How does he report that back to the office today?

PATRICK

1:07:45 It's so, so it's noted and efficiency on the PM form.

--- *Customer engagement* ---

PATRICK

1:07:53 And that's usually where next, because at that point, it's customers discretion whether or not they want to place a billable service call to get fixed.

BRETT

1:08:01 So, are you guys not sending out quotes for deficiencies that you fine.

PATRICK

1:08:05 Yeah.

BRETT

1:08:08 Do you want to be?

PATRICK

1:08:09 I mean, it makes sense.

BRETT

1:08:11 Yup. So the reason I'm bringing this up is that service trade, one of the number one ways that our customers have increase their revenue is through a process of what we like to call pull through work, pull through work is essentially, hey, you guys are going out to do a PM, you find an additional problem on site and additional repair opportunity.

--- Quoting ---

BRETT

1:08:28 You log and take pictures of that and send a quote out to the customer. So it's like pulling out more revenue from the work that you guys are already doing. You're not gonna get every single quote approved. But the more quotes you send out that is more that you are going to get approved, meaning more money in your guys pocket. Does that make sense?

JENNIFER

1:08:47 Yes. How did the quotes come through? Is that the original screen you had showed us in the beginning?

BRETT

1:08:54 Sorry, can you say the first part of that question again?

JENNIFER

1:08:56 How, how did the quotes get generated in the system? Is that one of the slides you and showed us in the very beginning of the meeting?

--- Customer engagement ---

BRETT

1:09:05 That is one of the slides I showed you. And actually what I'm gonna do for you guys here is I'm going to go ahead and log and efficiency or repair opportunity or

what you guys call a recall. And then I'm going to turn it around into a quote.

--- *Deficiencies* ---

BRETT

1:09:15 I'm gonna show Patrick the related deficiencies section and pretty much all gonna come together at that point. So if you gave me two or three minutes, we'll get there.

BRETT

1:09:27 Alright. So let's actually do that. It's log a deficiency as a technician, I can come in here and say whatever actually found on site. So maybe I found a bad compressor. But guess what? I'm a technician that doesn't want to type this out, I can even come down here and do this talk to text broken compressor. Really easy for your technician to put that in. He doesn't have to be crazy descriptive with it because he is gonna come behind it and add more detail. What I mean by that is, hey, let's take some pictures, videos, it, even an audio recording of what we found on site that's not only informing the office of what we found but also the customer. At the end of the day... our customers really liked the audio memo feature because their text don't have to type it in. It just makes it easier for them on site. All about that user friendliness. Patrick, how you would say Todd there friendliness. So I can come in here and say, hey, Patrick, it's Brett ran into this broken compressor. I gotta do XY and Z to fix it. It's gonna take me about three hours. I can go really into detail there without breaking my back. Type into that. From here. I'm gonna mark the severity of this deficiency. So whether it's inoperable, deficient, or suggested. And then we're going to tie it back to that asset that we're working on giving us that really Rich service history... service trade knows that we are working on a controls job right here. It's select it for us. And then the last step is to mark the status of this deficiency. So I'm gonna market as new and we're going to go quoted out. But what questions do you guys have on deficiency creation?

--- *Forms* ---

BRETT

1:11:08 Alright. So from...

PATRICK

1:11:10 It's pretty straightforward. I mean, it's basically the same thing I do now for the patients creation. It's just, we don't have the quote built into it at the end.

BRETT

1:11:20 Yeah. So what I'm hearing from you is, yeah, up to this point, you're doing everything that we're doing with those deficiencies are tracked on the PM forums. So, someone individually has to go through those PM forums and find those deficiencies versus getting notified of them. Yeah, that accurate. Yeah. So how many deficiencies would you say are getting missed?

JENNIFER

1:11:40 Hold on.

PATRICK

1:11:44 And it's not administered. It's. Yes, it is. It's not really man. It's more along the lines of I really just don't have time to go back into this all the time... but if I do log back into it, it's right there. Okay. Smart sheet. Hold on one.

--- *Forms ends* ---

JENNIFER

1:12:04 Again.

PATRICK

1:12:08 Soon as this loads up patient.

PATRICK

1:12:16 So...

PATRICK

1:12:26 Okay. There's one.

--- *Pricing* ---

PATRICK

1:12:47 34.

PATRICK

1:12:53 Five six seven.

PATRICK

1:13:03 Hey.

JENNIFER

1:13:05 Hello? Good.

PATRICK

1:13:06 Can...

JENNIFER

1:13:07 11.

PATRICK

BRETT

1:13:09 Okay. What's your average cost of a repair service call?

PATRICK

1:13:18 That's actually difficult to say sir?

BRETT

1:13:22 Conservative...

PATRICK

1:13:23 Supervisor... say... conservative, I'd say like 250.

BRETT

1:13:33 Okay. Well, if you take those 13 deficiencies and you multiply that by a conservative number of 250 dollars, that is two times 250 that's 3,200 dollars you guys are leaving on the table right there, and that's with what you just counted in this time.

--- Quoting ---

BRETT

1:13:51 So, what I'm hearing is deficiencies might be getting missed if you guys were to send out more quotes? Like I said, not everyone every quotes gonna get approved, but you guys have more opportunities to get work approved meeting, get paid, right?

PATRICK

1:14:06 Yeah.

BRETT

1:14:07 Okay. So that's what I saw there prior to taking you guys back to the office, all I'm gonna do is actually clock out of this job. Are you guys getting your work signed off on?

--- Tech On-site ---

PATRICK

1:14:18 Yeah. So, store managers do sign off on the work.

BRETT

1:14:21 Okay. So we'll do that real quick and we'll end from the field. What your technician is gonna do is they're going to select their onsite contacts. So, Patrick, I put you in here, I'm gonna select you as the customer. You're gonna come through



and review all these fields right here. Make sure everything's accurate. If you do not want your text to see this generate invoice button, it will be turned off. Most customers are not using this today. It's a permission settings. I would then hit review. Is the technician. I would hand my device or that was me as the technician reviewing it. This is where I had my device to the customer. They review everything. They acknowledge your guys, t's and c's down at the bottom. We make sure the information is correct. And Patrick, I'm gonna send you a copy here. So you have it. The last step is let's get that signature and let's market complete. So I'll show you what that looks like back at the office. But from here, hey, our technicians done is completed with this job. So he's going to clock out or just say, yes, we finished all three of these services. Go ahead.

PATRICK

1:15:23 Hi, there with you said clock out. So how will the tax track their travel?

BRETT

1:15:30 Yeah. Let me finish this and I'll show you in a second. Once he's done with the job, they'll hit next. In this case, I'm gonna hit no because I forgot to track travel. So when I hit no, I get clocked out of onsite there's three different clock events down at the bottom one of those clock events and route that's travel time.

PATRICK

1:15:49 Okay.

BRETT

1:15:50 And then your last, this job prep, maybe he's gotta do some work prior to going in. So I'll do here is I will go clock out of this job. I will say, yes, I finished everything. I'm done with this visit. So what happens here is the job disappears from my scheduled screen, but it does go over into my completed section. I am done with this job. Hold on.

--- Tech On-site ends ---

PATRICK

1:16:12 Second, one more thing to interrupt you for. I'm good at that today, I guess.

BRETT

1:16:16 Man. Hey question.

PATRICK

1:16:17 Back to your clock times, right? Yep. I love the fact that it's simple and it's a push button. Is there a way for, is there a way for time edits? And so like, so, you know, I know we have the generate invoice and some customers like to see their invoice right away or whatever?

--- Tech time tracking ---

PATRICK

1:16:40 Is there a way to edit times? And is there a way for the text to differentiate what's regular time and whatsoever?

BRETT

1:16:47 Yes, and yes... let me pull open this job. Again. So two different, I'm going to get to the adjusting clock events back from the office. But as far as differentiating between say over time and normal time, there's two ways to track time and service trade. You're going to have, yes, those clock events that we talked about, but also job items would be labor item example, refrigeration, labor. Maybe that's my standard rate. So, if I used one hour of that standard labor, but I used one hour of overtime, I might come in here to job items in this would require you guys having a job item titled over time, but I would just come in here and enter that Jobvite them for the amount of overtime labor hours I work. Let's call it to an added in. Does that make sense?

PATRICK

1:17:37 Hello, tech would have to do that?

BRETT

1:17:39 Tech doesn't have to do, I mean, your office staff to do it, but someone's gotta do it. But if you're tech knows he's working over time, he wants to get paid overtime rate. So he's probably gonna put that in, right?

PATRICK

1:17:51 Yeah. So yeah, I guess that's fine. It's just different. It's a little weird. You know, basically now, and when the impact of the labor entry, he asked to add a labor entry to the ticket. And in that labor entry that he has to pick if it's regular time over time travel.

BRETT

1:18:09 I've got ya. So, yeah, it is going to be a little different but that's as expected if you guys go with a different system... realistically because you guys are tracking over time, I think job items would be the best way to track it... as far as over time, at least travel, you're going to have the clock events?

--- Tech time tracking ends ---

PATRICK

1:18:28 Right. Okay.

BRETT

1:18:31 Question?

PATRICK

1:18:31 I just, yeah, I'm just, I'm not a super fan. I'm having multiple ways to do the same thing. But yeah.

BRETT

1:18:39 I recommend picking one of them, there's options because again, there's 900 customers and not everyone adopt the same process, but I would pick one of them and stick with it.

--- Tech time tracking ---

PATRICK

1:18:48 Yeah. So I really like to just the button, right? And I mean, I wouldn't even want that third option. The job crap. I don't even want that like travel or on site that's all I need. Okay?

BRETT

1:19:00 I can't remove job prep, just don't use it though.

PATRICK

1:19:03 Yeah. Well, I guess we'll just have to deal with the ads using job, right?

BRETT

1:19:10 Fair enough. But yes, I definitely recommend just picking one of those timing processes, sticking with it. And that way everything is consistent across the board. So if you guys want to use clock events, great use clock event, that would require your office staff to come in and say what was over time? What wasn't and I can show you that from the office. But to answer your other question, can clock events be adjusted? Yes. So here's clock events right here, you can see that my technician, Brett was in route for zero minutes. I was on site for an hour and a half.

--- Tech On-site ---

BRETT

1:19:41 So my total was an hour and a half. I clocked in two Miles away from location because my house is two Miles away from costco wholesale Raleigh. So it's gonna tell you that, hey, it's flagging it Brett two Miles away from location, but he clocked in. Do you need to call him? Is he at mcdonalds down the street? Because he's not at location, but I can always come in here with this pencil and adjust clock times as needed. And that can be an en route onsite workshop, right?

PATRICK

1:20:09 Okay. That's yeah, that's good. It's just, you know, I mean, I don't even need to tell you, but when we do finally shift to a new service software, there will be interesting.

--- Tech On-site ends ---

BRETT

1:20:21 There's going to be mistakes. I'm not gonna lie to you. Implementation of any software is going to be difficult because it's different, but that's why we're with you guys every state, single step of the way you're every single person in your staff is going to get trained how to use this product.

--- Tech On-site ---

PATRICK

1:20:39 Yes.

BRETT

1:20:42 Cool. So a couple of other things to show you guys were back in the office on that work order, job status up at the top says in Progress. However under appointments that says completed that because my technician completed everything he was supposed to do on site. So scrolling down what your office staff might be doing is reviewing the parts of labor, the Jobvite and let's make sure everything's correct? Hey, those widgets Brett added in from act me don't have a price on them. So let's fix that. I know that my standard cost for a widget, it's 15 bucks that's in service trade. It lets me know. So if it is a matter of your office staff checking over your technicians clock events and putting the correct line items on here, they can do that... and save it in... the couple of other things.

--- Deficiencies ---

BRETT

1:21:28 Hello. Hey, there is that efficiency that we reported on site? This is not the only way that you guys are gonna get notified of it. You're also gonna get an email notification. So the person who's doing the quoting is going to get this email notification saying, hey, Brett found a broken compressor at costco. Here's. This link that takes you right into service trade to go find more information about it. So, deficiency history is the one I just found 11 minutes ago. But guess what there's that related deficiencies button. It looks like Jay found a bad compressor a year ago. I ran into the same thing 11 minutes ago.

--- Assets ---

BRETT

1:22:00 It's been a year, so it might be the compressor. But hey, I probably want to look a little bit deeper into it as well. If there's multiple, they would just be listed out below. Do you think that's going to help your staff better understand if you've worked on that piece of equipment more recently?

--- Type of work ---

PATRICK

1:22:17 It will, it's just so like... we're really growing the service department, right? So, service department right now, I have two service supervisors and to service teams.

And for, in Georgia, we, in Florida, we don't have a service manager... yet. So the service supervisors are the ones that are going to have to break out and take time to go through these and review jobs and tickets and make sure we're not, you know, so they can catch ongoing issues and.

--- *Type of work ends* ---

PATRICK

1:23:00 I just, you know, it will help. I think we just, we, we're gonna need a little bit more growth before the service supervisors have enough free time to go through this. Okay. I, you know, I promise you, I do.

BRETT

1:23:13 Yep. And that's understandable. It's service trade is about making it easier on you guys.

--- *Deficiencies* ---

BRETT

1:23:18 So we're taking all your information, putting it in one central spot. You're getting all the information back. It's just not doing that notification for you. The notification it's doing is that deficiency email which brings you to this page. So in a way it is, yes. But to your point, you guys are gonna have to grow a little more to have the people to manage this, which is understandable. Yeah. Okay. So down at the bottom and to get more into the first question as far as how these quotes are created prior to us getting there here's, the attachments that are technician took in the field. So that picture and the audio recording. So the person who is creating the quote knows what's actually put on it.

--- *Quote templates* ---

BRETT

1:23:56 So we would come up here to add to quote. You guys would select the job type. This is, I'm gonna call it a repair and I'm gonna say, hey, this expires at the end of June. So here's our quote right here. It's pretty blank right now. You guys are more than welcome to come in and type whatever you need to type. But if you want to save time, which it sounds like you do.

JENNIFER

1:24:16 You...

BRETT

1:24:17 Can apply a quote template to this quote. So I did a broken compressor, for example, in my demo account. I have a compressor replacement template. So here's the general description of work as well as the parts belabor the job items I expect to use. So I add this in, you know, every customer's going to be a little different. I might have to change this around a little bit, but at least the bulk of it's there for me. Same with my part. So I can come down here and I can make sure all my pricing is correct.

But once I get here, I can select the level of detail that my customer's going to see on this quote, I can pick the pricing contract.

*--- ST app contracts and pricing ---*

BRETT

1:24:53 So if I change this contract, you can see it changes the markup rules based on the rules, the contract... then I can mark whether or not that customers taxable or not. And this is information those tax groups will be provided to you guys. During onboarding. We can see on this job or making a 73 percent margin that's pretty good.

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

BRETT

1:25:14 So I'm gonna go ahead and save that. And then what I can do is, hey send this to the customer via service trade. So, Patrick, I'm gonna send you a copy of this before I send it. I'm going to pick and choose what you see on that. So yeah, I want to include that picture because it tells a story to the customer. But hey, the audio recording, my technician, Brett Hurst a little bit, let's turn that off. And Patrick, do you have access to your email today?

PATRICK

1:25:41 Yes.

BRETT

1:25:42 Awesome. I just sent you an email with the quote in it. Do you think you could pull it up? And I can actually send it to myself.

PATRICK

1:25:50 Got it.

BRETT

1:25:52 Okay. What I'll do for Jan is I will pull it up right here. So Patrick, you pull that up. Once you get the email, it's gonna save you a respond to quote agenda for you. I'll explain it. So up here is going to be the new ones logo. This is what your customer's going to receive from us. So the description of work, the service, we want to complete, any files or photos. The technician took on site, all of our line items and then your guys t's and c's at the bottom, but we're making it really easy again to work with your customer. So they have two options. They can approve this quote. They can request changes on this quote. There's not an option to decline it because we want an answer from.

JENNIFER

1:26:39 Okay.

BRETT

1:26:41 But what are your guys initial thoughts on this?

PATRICK

1:26:44 What have, what does it look like when they request for change?

--- Quoting ---

BRETT

1:26:47 Do it, I'll show you.

PATRICK

1:26:49 In.

BRETT

1:26:51 Hello. Alright. So, I do a quick refresh back. Are you looking back at my screen?

PATRICK

1:27:00 Yeah.

BRETT

1:27:01 Course, where it says quotes status that goes back to draft. I'm tracking the history of this quote. See that, hey, you requested changes to this quote after reviewing it.

--- Quote templates ---

BRETT

1:27:10 But down here on the quote, I can come to comments and say, hey, Patrick requested changes. I forgot to add the compressor. So I would come in here. I would say... there we go delete that. I would save it and I would send this back out to Patrick. Does that make sense?

--- Quoting ---

PATRICK

1:27:36 Yeah.

BRETT

1:27:37 Okay. So, if you can go ahead and approve that for me, I can show you how we turn it back to a job where you are.

BRETT

1:27:47 And if it's too much trouble to go into your email again, I can get it for you.

PATRICK

1:27:51 No, no, no, it's not. I just got a text to my soldiers field that our most recent year now.

JENNIFER

1:27:56 Sure.

PATRICK

1:27:58 Yeah.

BRETT

1:28:01 Never ending. So, always something.

BRETT

1:28:09 And something to point out is you guys will get email notifications like, hey, Patrick viewed this quote changes needed to this quote. So you'll be able to know like when your customers viewing approving things for you all.

BRETT

1:28:24 Alright, thank you, sir. I'm gonna do is a quick refresh and let me know when you're looking back at my screen.

PATRICK

1:28:38 Give me one second... okay?

BRETT

1:28:42 Right. Like I was saying, I do have this really cool quote history. It's like having a paper trail in the digital space. I'm tracking your IP address, so it knows that you were the one that viewed it, requested changes, then approved it again with po number 65 34.

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

BRETT

1:28:58 So from here, you've got two options. You can add this to an existing job. Hey, if I'm going out to costco wholesale Raleigh on Friday? Great. I'm just gonna add it to that existing job that reduce the amount of trips I take to that location. If that's not the case, I'm going to create a new job over it's going to copy over Patrick po number.

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

BRETT



1:29:16 I'm gonna throw a due date and copy over all attachments and comments. And from here, you guys even have the ability to create a budget for a job. So we'll do exactly that. So here's our job, the last step on it would be to actually schedule it and that's something we'll get to shortly.

--- *ST app contracts and pricing* ---

BRETT

1:29:34 But on that budget, this is a brand new feature came out like last week. You guys do have the ability to like I said, create budgets for things and it's gonna track kind of how you guys are tracking in relation to your budget and your margin. And this will have a history as well.

--- *Deficiencies* ---

BRETT

1:29:52 What questions do you all have on that deficiency loop in, into the quote?

JENNIFER

1:29:59 Hi guys. I'm just gonna mute myself for a second, I.

PATRICK

1:30:03 Think.

PATRICK

1:30:08 I like how simple it is but I'm not really sure I want text generating quotes in the field.

BRETT

1:30:15 That was not, that was the office staff generating a quote?

--- *Access to information* ---

PATRICK

1:30:19 That was office staff. Okay. Yeah. One of BuildOps things is that they, you can attack it hit, generate a quote from?

BRETT

1:30:27 Yeah. I mean, you can do that in service trade. It's a permission based setting. Majority of our customers are not using that because, you know, texts are running around with their heads cut off some times and they miss things and really, they just want the office to do it. It's possible, but most people don't use it.

--- *Quote templates* ---

BRETT

1:30:47 But do you think your office staff would be receptive generating these quotes the way I showed you today?

PATRICK

1:30:51 Yeah. I mean, Jennifer is already makes 90 percent of the quotes for me. So this will just make it easier especially if it was a saved. So, you know, I mean we do have, you know, compressed and we do compressors, condenser as case change out and stuff like that.

--- Quote templates ends ---

PATRICK

1:31:10 So it'll be great the agenda and your quote for vacation. He's out of the store. Okay? Being here, you go.

BRETT

1:31:15 Right.

PATRICK

1:31:16 We'd have to, we'd have to review probably every 30 60 90, whatever we send it out. We'd have to review material cost.

BRETT

1:31:25 Yup. And you're going to be able to update in our material cost inside of service trade viable.

--- Quote templates ---

BRETT

1:31:29 So really easy to do that. But yeah to me also, it sounds like it's gonna save down to, for a lot of time in the office. You guys have those quote templates in there for repairs you guys do. So it's your guys verbiage and it's just really easy to create that get us, the customer even better track it.

--- Tech On-site ---

BRETT

1:31:45 So the last step here guys is I am going to go back to our war quarter. I'm going to simply complete this job because I reviewed everything I made sure it was correct and we're gonna simply invoice it. So I'm making sure my unit cost is correct. It's important not your guys unit price, but I'm gonna go ahead and create this invoice and this is essentially our pro forma invoice and service trade.

--- Quote templates ---

BRETT

1:32:09 We can see our margins are way off. So I might come in here and fix this and see what's going on... this one down here. So when I make that change, I see our margins are now 62 percent similar with my quote. I could pick the level of detail about my customer sees on this as well as if we're taxing them or not.

--- Invoicing ---

BRETT

1:32:29 So from here, you've got two options. Yes, you can send this invoice out via service trade via the invoice, like you saw on the slides earlier. Or if you guys do end up connecting this with your accounting system, that's something, it would be something we would have to scope out as far as writing code to make it happen.

--- Invoicing ends ---

BRETT

1:32:44 But nine times out of 10, we can't connect with the accounting system. Acumatica has one we can work with. But if I send you this invoice... you can take a look at what it looks like. I wouldn't worry about pulling it up right now. So I'll pull it up for both.

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

BRETT

1:33:00 Yeah. So Neil logo would be up top. This is what your customer Richard received from you, all your guys t's and c's the bottom. But if they have any questions what they owe you about four grand for they can click this button right here. It pulls up that service like we talked about.

--- Tech On-site ---

BRETT

1:33:15 So again new ones logo telling your customer that, hey Brett perform this work at this date and time here's. Everything he did for you guys on site here's. Everything he used. If I added any additional comments, they would be down below. But as far as file, hey, mr, customer here's your PM checklist.

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

BRETT

1:33:33 Here's where you signed off on the work. And here's a picture my technician took as well as lastly, I found a deficiency at your location. Here's a picture and already recording of it, you can expect a quote from us sometime soon. But you guys know your customers a lot better than I know your customers. How do you think they're gonna react to this level of post service support?

--- Paper process ---

PATRICK

1:33:56 Poster post service support... is good. It just requires multiple departments involvement, which is on which is difficult sometimes because, you know, billing like the easier issues we can usually fix in the office between myself Jennifer dispatching and the local billing that we have here in the US problem is our dispatcher reports to the Canadian service operations manager and our biller and report to the Canadian billing department manager.

--- Paper process ends ---

PATRICK

1:34:30 So if we need anything that she can't that one of them can't handle locally. And then we have to set up a conference calls and go through nightmares and emails and all kinds of stuff to get issues resolved.

BRETT

1:34:42 But with service straight, everything's all going to be connected. So why would they, why would you be setting up conference call to find information like that?

PATRICK

1:34:50 Well, that's true, but the service trade. So everything you've got. So one question is this is an online at only or will it work if they are working in an area that does not have service where they would just re sync afterwards?

BRETT

1:35:05 Yeah. So that's a great question.

--- Access to information ---

BRETT

1:35:07 How it works for text in the field. If your technician does not have service, essentially, all the information he puts into his application will cash in the system. Once he catches a signal, all that information will push to the home office.

--- Accounting integrations ---

PATRICK

1:35:27 Okay. So then the other thing, the issue of getting rid of GP. So like I said, getting rid of GP is really what's driving this whole entire thing about changing service software and all that. Because great, this is, it, it's a disaster. It's it just requires too much inner coordination, inter departmental coordination to achieve a single goal to include something as simple as pulling a service profitability report... what back end programs... interior connect with service trade? That will be a 2022 or at least 2020... or something.

BRETT

1:36:13 You're talking about accounting system?

PATRICK

1:36:15 Yes. What's gonna do the back end?

BRETT

1:36:18 So we connect with plenty of different accounting systems. We are a product that has an open API application programming interface, meaning we can connect with pretty much anything else that also has an open API. So on our website which I'm pulling up right now, a lot of our customers use Quickbooks. Our recommendation is intact because it's a cloud based accounting system, interacts really well with service trade. Some of our customers use Computerease, which is a Construction accounting software as well as a lot of the different Sage product. But then there are the option for custom integration. So acu America would be an example of a custom integration. Great Plains. If you were to keep, it would be one, the point here I'm trying to make is we can work with a lot of different accounting systems. It's just a matter of, hey, is it a custom integration we have to build for you guys or is it one that we already have?

PATRICK

1:37:14 Yeah. Well, that's what I was going to ask, right? So if so, right, basically, I don't know what we're paying right now for mobile deck and Great Plains, I don't information. But so going to a new platform, not only would it have to work better for our field employees, but the combination of service trade and whatever back end program they decided to use would have to be economically are financially responsible decision switch. You know what I mean?

BRETT

1:37:49 100 percent honestly, Patrick my recommendation, let me ask you this with acu America. Has it taken so long? Just because there's so many different kind of modules that you guys are putting it together between accounting and service timecard?

PATRICK

1:38:02 There's the service portion there's the Construction portion, there's the accounting and billing.

--- Accounting integrations ends ---

PATRICK

1:38:09 So the ap and the Ar portion there's the parts portion. And... that's all I'm really aware of right now, there may be more back end to it, but... you know, any meeting that I've been in, I send them back to the drawing board every time because even their mobile app is over complicated. So, you know, we're gonna have, we're gonna have a nightmare of back end work or, you know, a tornado of back end work, fixing technician mistakes four months after switching services. If we went back

there. So every time they come to me with the service side of it, I kick him back to the drawing board and it's too complicated.

*--- Accounting integrations ---*

PATRICK

1:38:49 It's too complicated. You know, I mean all they need, all they should need to all you should need to pick to generate. And after our service call, is the customer, the location and the work order?

BRETT

1:38:59 Exactly. I guess, right? You're using an accounting software back to you about it goes known for their accounting. So, it's an accounting software that built a plugin for service. It's not their specialty. So it makes sense that it's not the best application that's kind of where I'm coming from with. I know you guys want an all in one solution that's gonna handle everything across the board.

*--- Accounting integrations ends ---*

BRETT

1:39:20 But guys realistically, all in one solution. I was thinking about this before our meeting. If I pull out my Swiss army knife, I'm not using my corkscrew to cut a room because it doesn't work that way. It's not made for that. I'm using a knife or you go on your phone.

*--- Accounting integrations ---*

BRETT

1:39:33 I'm not clicking in my weather app to look at my calendar because it's not an all in one solution. So why would you pick a software that says it's an all in one when different software companies are catered to doing specific functions, whether it be accounting Construction or service?

PATRICK

1:39:51 Yeah.

BRETT

1:39:53 So that's really what service trade is. We're a best of breed software. A lot of our top notch customers. They are buying specific softwares for the individual parts of their business, and they're buying cloud based software so they can connect them altogether. And that's exactly what we're trying to do with you guys. So I might recommend if you guys really do like active America, yeah, keep it for the accounting and Construction side and get it figured out and then use service trade for the parts and the service side, connect the two together.

PATRICK

1:40:25 Yeah.

BRETT

1:40:27 So that, yeah, that's the best recommendation I have for you all.

*--- Purchase decision ---*

BRETT

1:40:31 Obviously we have to go up to the higher ups, but from everything you've told me today, guys, realistically, you're a great fit for service trade. Sounds like service trade is a great fit for you all as well, would you agree?

PATRICK

1:40:45 I do think service trade is good. I don't know, I'd like to get James opinion on it too. I like it. I do like... realistically I like this, you know, anything is going to be better than what we have, but I do like what you've shown us. I just figure out what we can couple it with to provide with the back end needs specifically the Canadians because they're the ones that deal with and Jennifer, that's why I asked Jennifer.

*--- Purchase decision ends ---*

PATRICK

1:41:13 It is sitting on this to see the back end and GP way more than I do. Like, I mean, I can barely navigate GP, you know, I can get in there and find tech notes and costs and stuff. But when it comes to reporting generating and all that stuff that's 100 percent generally?

*--- Invoicing ---*

BRETT

1:41:31 So as far as the, you mentioned this at the beginning of our meeting, the profitability reports are really important. I know I said service trade is not a financial system. However we can track all that information. If I come over here to invoices. And I, this is what all my different reports and service straight are gonna look like.

*--- Accounting ---*

BRETT

1:41:48 I'm gonna have all these different fields where I can narrow it down by. But what I would do in this scenario is I would come in and run an invoice totals report. This would essentially export a spreadsheet over to excel. And then let me pull this up. There.

*--- ST app contracts and pricing ---*

BRETT

1:42:01 It is so I can come in here and say there's the job here's, all the information about the job, the total of it, the job costs total, my margin, the contract associated

with it. So all that information is here for me. It's just gonna be export it into excel.

PATRICK

1:42:18 So, do you have one on there? What does it look like when it's negative? Because, you know, unfortunate reality is not every job is.

BRETT

1:42:26 It would just say the negative gross margin.

PATRICK

1:42:30 There you go. Alright. Okay. Yeah, that's fine and sell because I can manipulate excel really well.

--- *Quoting* ---

BRETT

1:42:38 Perfect. And yeah... that's the most important thing to point out. I can report on invoices and there's different things I can report on with invoices. I can report on quotes, deficiencies, jobs as a bunch of different things that I can come in narrowed down and find.

PATRICK

1:42:56 Okay.

BRETT

1:42:56 So for example, actually just one of...

--- *Forms* ---

PATRICK

1:42:59 Is there a, is there a way to do like frequent reports... set up a certain kind of report that I like to pull that? I can just go back and change the dates and pull the same report.

BRETT

1:43:11 My recommendation for you would be to bookmark that report, you know, up on your bookmarks bar. And if you click that link, it's gonna have all the same fields you filled out.

PATRICK

1:43:22 Same fields but they don't need blank.

BRETT



1:43:25 No. So if you filled out like service call and put some things in a comcast... and then I bookmark this to make it easy to find. And then I exit out of it, but went into... they change that.

PATRICK

1:43:50 Yeah. So.

BRETT

1:43:50 It, it appears that there was no way to do that. I'm gonna have to check on that one for you.

--- *Forms ends* ---

PATRICK

1:43:56 Okay. You know what I'm talking about, that, right?

BRETT

1:43:59 No, you don't want to put it in all this information again. You just want to quickly run the report.

PATRICK

1:44:03 Yeah. So like, you know, basically, I'm having the capability of like building having the managers like, you know, service manager, Construction manager myself, Jan, we're all going to be looking at different things, right?

--- *Type of work* ---

PATRICK

1:44:17 So like the manager, he's not gonna care of really what Construction is doing. So, he's going to pull reports based on service, customer service, techs, Construction manager, flip side is not really going to care about services doing. He wants to see how his jobs are doing. And then, you know, myself, I'm gonna have to look at everything.

--- *Type of work ends* ---

BRETT

1:44:34 Hi, gotcha. So with what I just showed you again, native service trade is what we're looking at today. It appears there's no way to save your reports. You guys are a very large company with all the different branches, something I kind of want to bring up to you.

--- *Implementation and ongoing support* ---

BRETT

1:44:49 I can't show you everything today, just because I don't have access, but at the screenshot... through our enterprise level, which is our top notch pricing tier. We use Amazon quick site. It's up our BI tool to kind of take your guy's data out of service trade and display it onto these charts.

*--- Implementation and ongoing support ends ---*

BRETT

1:45:07 If you guys end up using quick site, this is something that you can save reports and just quickly run on. Each person in your company, can have different reports, styles of what they want to stay.

PATRICK

1:45:20 That's fine. I mean, it's not like it's a deal breaker or anything. So be able to save reports, but, you know, it's just thinking ahead of schedule, you know?

*--- Purchase decision ---*

BRETT

1:45:30 Exactly. And that's kinda the reason I showed you this here. Like I said, I don't have the ability to show it. I just don't have a log in for it. However my field rep current does. So if it's a matter of you guys wanting to dig deeper into this evaluation, will poker on the next meeting and he can share this.

*--- Accounting integrations ---*

PATRICK

1:45:46 Yeah. And I, yeah, I'm familiar with PowerBI. I've I actually use PowerBI in are interconnected with sharepoint for something completely different, but it was to show assets and troops available in southeast Asia area of responsibility. So it's pretty.

BRETT

1:46:03 Wow. That's a sound cool and something important to point out here. You don't have to use click that you can use whatever BI tool you want. Quick sites, just the one we use, we recommend.

BRETT

1:46:18 But with everything I've showed you today, Patrick, like I said, it really does seem like the linens and a really good fit for service trade, vice versa as well. Was able to show you today one those profitability reports to time tracking three problems for recurring issue.

*--- Recurring maintenance ---*

PATRICK

1:46:36 Yeah, definitely. The only remaining question I think I would have for this wouldn't be how we Construction job would work, that would spend three months yep?

BRETT

1:46:46 And you have a couple of more minutes right now. Let's set one up. Let me just find the location. We're gonna go to comcast center in Philly?

PATRICK

1:47:00 Okay.

BRETT

1:47:04 Tabs, makes it go faster. Alright. So, I'm on my location page, what I'm gonna do is add a job from here. I'm gonna select the job type. We're gonna call it Construction and we would associate the pricing contract we have if we have one. So all these services are the actual services I provide to my customer.

--- *Quote templates* ---

BRETT

1:47:23 So what I would do is I would come in and create a new service. In this case, we're just gonna say the building is our asset. We can change it on later if we need to. I'm gonna call this a refrigeration job and you guys put whatever description you need to put in here. So.

--- *Pricing* ---

PATRICK

1:47:40 Yeah, we just, yeah, just put remodel or whatever estimated duration and be like 950 were estimated duration is the number of man hours?

JENNIFER

1:47:49 Would work?

PATRICK

1:47:50 Or the number of.

BRETT

1:47:51 Man hours? Yeah.

PATRICK

1:47:52 Okay. So let's just use 945 or whatever.

BRETT

1:47:58 And let's call it 20,000 dollars.

--- Dispatch ---

PATRICK

1:48:01 Numbers are like 200,000, yeah.

BRETT

1:48:04 Alright. Yeah. He's not the refrigeration space, you know, lot more than I do. Yeah, we just created that additional service that somewhere in this list right there. So what I'm gonna do is I'm gonna go ahead and schedule this for myself and say, hey, I'm going to select multiple different days that I'm gonna schedule this for and you guys would come through and select all the different days that you have to go out. So this is one of the reasons service trade isn't necessarily built for Construction job because you do have to come here and select the multiple days, but I could say, hey, I'm working these three weeks in June. And then I'm work in the three weeks in August and go through here and schedule it for all the different days. I'll leave us with that for now... and we'll say each appointment is six hours. So we create this. And what's going to happen is it's gonna bring us to another war quarter like the one we worked on today for service, but it's just gonna have all these different dates as appointments.

--- Dispatch ends ---

BRETT

1:49:08 And then you're going to be able to fill in, pull up, you're going to be able to fill in what exactly you have to do. So if you have to, you know, change what you're doing on this.

PATRICK

1:49:18 Wait a minute, wait a minute. So it says 945 hours, right?

--- Tech time tracking ---

PATRICK

1:49:25 So as the Construction guys are clocking in to that call, will it show a building total? Like a running total of the hours that have been clicked on that?

BRETT

1:49:39 Yes, as long as all of your appointments or on one work order like this, the hours will be tracked below.

PATRICK

1:49:47 Man. That's beautiful. That's what I was, one of the things like that. So right now, I'm I just, we have weekly job class meeting and like I have to wait for labor to go through HR hit payroll and be posted back before it will show up on my job. So.

BRETT

1:50:04 Wow.

PATRICK

1:50:04 Once again inter departmental coordination, I have to go to HR to payroll and wait for them to post the cost and the hours. So the absolute best at the absolute best that I can ever have is always going to be at a minimum one week bye... bye.

--- Tech time tracking ends ---

BRETT

1:50:22 Okay.

PATRICK

1:50:23 And if for any reason payroll doesn't post, they get home, they get hung up or someone's on vacation or whatever. I mean, I've seen it as far as like three or four weeks behind.

BRETT

1:50:33 Wow.

PATRICK

1:50:33 Get to that point. I have no idea where I'm at on the job until we come out the other end and it's like, well, we just busted our labor hello.

BRETT

1:50:40 Yeah. No, that's pretty concerning that you don't know how a Construction job is doing until you're done with it. And you're like, wow, we mess that up or wow, we did really well on that. That's definitely something you want the ability to track. So basically, if your housing, all your service information and service trade, all you gotta do is go run that report of, hey, how am I tracking on this? Am I over my estimated hours that I planned for this job and you'll be able to know that right? When you run the report essentially?

PATRICK

1:51:08 Yeah, no, that's freaking awesome. I like that a lot perfect. I mean, I would literally be able to just put bring that spreadsheet to the job cost me.

--- Deficiencies ---

BRETT

1:51:18 Exactly, right?

PATRICK

1:51:20 Yeah. Okay. Hello.

BRETT

1:51:22 Okay. So Patrick, is this something that you are going to take too? I'm Mark, and...

PATRICK

1:51:31 I'm gonna take it to mark? Does I report to Tom? But I will take it back to mark and tell him that it is, yeah, you know, 1,000 percent better solution than actually America with the drawback of we will still have to have an accounting software on the back?

--- Purchase decision ---

BRETT

1:51:48 Yes. So when do you think you can talk to mark about that?

PATRICK

1:51:52 To send marketing email in about five minutes after we hang up?

BRETT

1:51:55 Okay. So really what I'm looking for here, Patrick, is let me actually pull something up. We recently invested in this software called recap. It allows us to kind of collaborate a lot better during this evaluation process and it's a one central spot that I'm going to send all of our information in. So I'm gonna create this after our meeting. I'm gonna put it in the initiatives we talked about at the beginning of the meeting and I'm going to come in here and fill out next steps. So we did this initial demo today, June second and I'm gonna mark this as completed and I'll put you in Jennifer on here.

--- Purchase decision ends ---

BRETT

1:52:30 So you have visibility into that. Also on this, I'm going to include a bunch of different resources that you guys should check out. So they'll all be on this resources tab. But we did this today. You're gonna come in here and you're gonna email... you know, because it mark with a K or see.

PATRICK

1:52:52 Okay.

BRETT

1:52:56 You need anything specific that to send mark that would be helpful and kind of explaining who we are and what we do?

PATRICK

1:53:03 Well, mark is the one that referred you guys to me, so.

BRETT

1:53:07 Okay.

PATRICK

1:53:07 Don't know how much information he problem, he probably hasn't happened. It was probably a cold call that you guys did, and he was like, well, let me send this to Florida.

BRETT

1:53:18 Yeah. No, that makes a lotta sense. You're exactly right? It probably was a cold call to talk to mark and mark said to talk to you. So it sounds like, yeah, he probably has some idea of what we do. I can also include resources.

PATRICK

1:53:31 That you were, you had price brackets.

--- Accounting integrations ---

PATRICK

1:53:34 So that's definitely something mark is going to be interested in because he's gonna have to do a cost analysis. I'm continuing down the rabbit hole with actually America... or, you know, looking at the cost efficiency of using service trade and also buying a new accounting software. Do that?

PATRICK

1:54:06 Like I said, you get rid of Great Plains because Microsoft horizon, Great Plains and they are not going to be supporting anymore, which doesn't help us at all.

BRETT

1:54:17 Yeah, no, I totally understand you. Okay. And what I'm gonna do here is invite you both to this. What is it?

--- Accounting integrations ends ---

PATRICK

1:54:32 Do you do?

BRETT

1:54:32 Here. Gotcha. Let me just pull this up the invite.

PATRICK

1:54:37 It's just first dot, last name and.

BRETT

1:54:43 Bye.

BRETT

1:54:50 Huh. Gotcha.

BRETT

1:54:58 Cool. So you guys are both invited in this as we go through this. I'm going to include you in this to you're. Going to get reminders day of on the tasks we said we were gonna do.

--- *Purchase decision* ---

BRETT

1:55:07 So you're gonna go talk to Patrick. I'm gonna actually set this for tomorrow just in case you don't get to it today. You will get a day of reminder to do it. But from there, our next step in this process would be, hey, if marks interested, we should probably get him on a meeting and show him what we're working with. Is that something you'd agree with?

--- *Dispatch* ---

PATRICK

1:55:24 Yeah. And we would have to also include Scott.

JENNIFER

1:55:27 Hello?

BRETT

1:55:30 That last name for me.

PATRICK

1:55:31 Really?

BRETT

1:55:32 See. And then marks last name was?

PATRICK

1:55:36 Bringing them?

BRETT



1:55:37 Yes, gotcha. Okay. So, we will, once you have that conversation with mark, I will call you because you're going to have that conversation today or tomorrow sending an email out today or tomorrow? When is a good time for me to call you in the office Patrick?

--- Dispatch ends ---

PATRICK

1:55:56 Well, right now, I'm in the office Mondays and Fridays, but here in the near future, I'll be in the office every day. So seven and well, probably eight to four, eight to four 30. And, you know, I mean, I can't really give you a time because usually from seven in the morning till I'm laying in bed and my phone doesn't stop. So it'll just whatever works best for you. Try to give me a heads up and I'll make sure it doesn't have any other meeting conflicts and we'll be good to go.

BRETT

1:56:29 Yeah, that sounds like a good plan of if, hey, I call you're busy, I'll call you back or I'll shoot you an email or whatever that might be, but can we at least pick a day that we think would be better?

PATRICK

1:56:37 Monday or Friday, take a Friday?

BRETT

1:56:41 Okay. Friday the 10?

PATRICK

1:56:44 Yeah, sure.

BRETT

1:56:46 Right... right.

BRETT

1:56:59 Alright. So... I'm gonna continue filling this out as we go through this process. I've found it to be a really beneficial tool because you're not gonna have to go through 14 emails that I send you. All your information is going to be on this page when I send this to you here's. What it's gonna look like. You're gonna see summary. I'll fill this out. You're gonna see next steps which is what we just filled out and we will continue to fill out. And then you're gonna see resources which is again where I'm gonna put all this information, which is also where on all include pricing information, accounting, integration, information, some other blog posts we have that I think might be beneficial for you to send tomorrow night email. Is that, are you okay with working with this tool?

PATRICK

1:57:42 Yeah, I'm fine with matter of fact, it looks a whole lot like the software, right?

BRETT

1:57:48 Perfect. I'm trialing it this month. It's been, I've used it with four different companies. It's been really nice. It's called recap.

PATRICK

1:57:59 Yeah, it looks like a rebrand of the sharepoint but that's fine.

BRETT

1:58:06 Good. So, yeah, Patrick, I wanted to say, thank you so much for your time today. And Jennifer, if you're still here as well, you as well. I will get this email out to you guys shortly, give me about 30, 40 minutes to put it together. And then you'll have a link to this where you can go explore all of this information.

*--- Purchase decision ---*

BRETT

1:58:22 And then like I said, I will be giving you a call on Friday the tenth to determine how your conversation went with mark and ideally schedule a follow up meeting with mark and Scott so they can see the product and determine if it's something you guys want to continue diving into.

*--- Purchase decision ends ---*

JENNIFER

1:58:37 Okay.

BRETT

1:58:39 Of course. Thank you both for your time today, and I know I went a little late so I definitely appreciate you guys stand, yep, awesome. You do the same take care guys.

*The End*