ServiceTrade Demo with PDM Group

Brett Griffith with PDM Group
Recorded on 6/24/22 via Zoom, 1 hour 10 min.

Participants

SERVICETRADE

Brett Griffith
Territory Manager

Lucas Meinken
SDR

PDM GROUP

Angela Covington
Service Coordinator

Keith Gulick
Service Manager

Topics

Transcript

BRETT

0:00 Hey, good morning, Keith. Can you hear me?

KEITH

0:02 Yes. How are you?

BRETT

0:03 Awesome. I'm doing well. How are you?

KEITH

0:05 Yeah.

BRETT

0:06 Awesome. Lucas mentioned that you might have Angela joining as well. She with you or is she joining separate?

KEITH

0:13 And do you go on this thing? Yeah, she'll be joining... chief. She lost track of time.

BRETT

0:21 No worries. Not a problem at all. We can do, you want me to wait for her? Do you want me to just get started?

KEITH

0:27 And start, she's hopping on right now. Okay?

BRETT

0:30 Yeah, perfect. So Keith, welcome Angela as well. My name's Brett griffis on the inside territory manager here at service trade for the northeast. So thank you both for joining me to give you guys an idea how we like to run these meetings. I'm just gonna start out by asking you guys some questions about your business and I'm really just trying to get a feel for what you guys are working with today and how I got her how I can help you in the future. From there. I'll give you a little bit of background on service trade itself and then we will go ahead and jump into the demo. Does that work for you both?

KEITH

1:00 Yeah, sure.

BRETT

1:01 Cool. So, the gentleman you spoke with prior to me, Keith, Lucas gave me a lot of notes on kind of what you guys are looking for, but let's start from the top with those. So, I know you guys are obviously a commercial mechanical contractor run at about 17 texts in the field. It looks like you heard of us from one of our current customers?

KEITH

1:22 Yeah, they're out of that Brittany arrows and state New Jersey there, we do a lot of work with them, hand in hand work with them.

--- *Purchase decision* ---

BRETT

1:30 Nice. And did you get like a quote from them or something or?

KEITH

1:33 No, no. I started talking to them. Well, my boss told me... check this platform that they use, which is you guys, I spoke to them. They're manager is on vacation for the next two weeks. And then when he comes back, I go away, so I wouldn't be able to see anything from them until this week of the eleventh. So I figured I just set up a demo with you guys to kind of get something. Yeah, that's fine.

--- *Type of work* ---

BRETT

1:58 Yeah, might as well just come right to the source that's exactly what we're gonna do today. Okay? So it looks like you guys are doing a good amount of PM contracts, not really working too much on the installer Construction side. So mainly service.

KEITH

2:11 Mostly service maintenance. So little bit of Installation, not a whole lot like when I say Installation, it's more or less for you and, you know, replacements of existing equipment, any Construction that we do get into, which is very few is like design.

BRETT

2:30 Okay, perfect.

KEITH

2:31 That's what a lot of our...

BRETT

2:32 Customers are doing as well. I'm gonna point out right off the bat service trade itself. Hence the name. We're really good at managing service. And that's pretty much all we do. So we'll cover all that today, but it looks like you guys are using a paper process, a lot of paper, what Lucas said, and then this vertical market software, is that the name of the software?

--- Paper process ---

KEITH

2:53 Yes. Okay. What's that?

BRETT

2:57 Tell me, tell me a little bit more about that. What is it?

KEITH

3:02 It's basically a whole kind of the same thing, but very old and antiquated and Stover paper, but it does a lot of it's. Got a service boarded for scheduling, issuing purchase orders, invoicing, it does a lot of stuff. A lot of stuff that we don't use.

--- Accounting integrations ---

BRETT

3:24 I gotcha. I'm just gonna take some notes. So, I know to show you guys. So basically, from your conversation with Lucas, what he told me is, yes, you guys are in the process of looking for a new software. He mentioned your owner is also checking out Quickbooks to have, you know, an accounting system. And then service software, is that accurate?

--- Access to information ---

KEITH

3:42 Yes.

BRETT

3:43 Okay. And pretty much you're looking for everything. So you need, how are we going to manage our services? How are we going to dispatch or text invoice? Our customers want technicians to have mobile access to give them more information on site. Sounds like today with maybe your paper processes, it's maybe a lot of calls back to the office for information.

--- Type of work ---

KEITH

4:04 Yes.

BRETT

4:05 Okay. Cool. And then one thing I did want to talk to you about, Keith. It sounds like you're the one that's doing the quoting, is that right?

KEITH

4:15 Well, I do a fair amount of estimating quoting... as do the one owner Denison or one engineer, Fred, they do some estimating on the larger projects... on that and maintenance agreements. So. Awesome.

--- *Deficiencies* ---

BRETT

4:32 Okay. And your quotes, are they both for, you know, new work as well as deficiencies, your text down on site?

KEITH

4:39 Yes, yeah, I'll do a new replacement work. I'll also do they'll find something customer says, I will send me a quote for the repairs, whether it's you know, change out a motor, couple of bullets, some small I'll do all of that.

BRETT

4:52 If, if it is, you know, your tech is that location for a PM and he sees that there's a broken compressor on rooftop unit one. How does he reporting that information back to you guys?

KEITH

5:02 It all gets written down on paper. And then the obviously telling me at the end of the day, hey, we found this, they'll turn in their report, they'll turn into parts requisition form with the materials that are needed.

--- *Quoting* ---

KEITH

5:14 And if the customer wants to quote by, we'll put a quote together and send it out. If they say just makes it all or reports and fix it.

BRETT

5:22 Okay. And then on the, along the lines of if you have to send the quota, how long does it actually take you to go through everything that technician sent you and get the quote?

--- *Quote templates* ---

KEITH

5:31 They used to take me pretty quick, but nowadays it takes me a while to get through everything because of all the paperwork, I have to go through. The biggest

part is waiting on pricing from vendors. But then I mean, I have to go in and I have a spreadsheet for our, you know, our markup tables and enter all of that stuff in there with the hours I think it's gonna take from there. I'll transcribe it now onto a proposal template, type everything out, fill it all in an email to that customer.

--- ST app contracts and pricing ---

BRETT

5:58 Okay. And one thing to call out there, it sounds like you're manually doing the markups.

KEITH

6:03 I have, no, I have my spreadsheet. I have a, it's an excel sheet with the actual mark ups that we use. Okay. Some customers have different, some have a set markups on this. The majority of them, it's like a sliding scale that we use. So, I, it's a five to input that formula that's already in there and save. But yeah, it's gotta get change from time to time.

BRETT

6:24 Okay. Gotcha.

KEITH

6:26 Labor rates, every customers got, most customers have different labor rate.

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

KEITH

6:29 So I have to know which, what's their labor rate. I have to go through the site file, find it and input it.

BRETT

6:36 Yeah, I see exactly what you're saying. I'm gonna make your life a little bit use? Alright? I hope to show you that I'm going to make your life a little bit easier with that today.

--- Paper process ---

BRETT

6:44 Okay. One other thing I had written down here was, you know, your checklists for your technicians, if they're doing a PM, it sounds like maybe technicians aren't filling out checklist on site and you're not getting proper information back in the office.

KEITH

6:58 It's not so much the PM, it's more or less their actual right now.

KEITH

7:01 Like I said, everything's on paper. So they'll fill out their report, the, their job number, their job or ticket number, the service site, the model serial number of the equipment they're working on the parts they've used, even the date and their name, and our, sometimes some of that stuff is missing.

--- Tech On-site ---

KEITH

7:18 And then a very important thing which leads to invoicing is the job complete or is it not complete? Do any parts? There's little check marks for them to check on that and they don't do it. So... I've had to implement something that's more of a pain and then anything right now.

--- Tech On-site ends ---

KEITH

7:33 But I was trying to look at for as they fill out their report on it, whatever it is their phone time as they're filling this out. It won't let them send it until specific things are in that, that's more or less what I'm talking about.

BRETT

7:47 Yeah. So once we get there in the demo, I'll be sure to point that out for you. There's a couple of different ways to do it in service trade. We can do what you're looking to do as far as, you know, putting digital handcuffs essentially on your technicians to make them do what they have to do before leaving location. But we'll talk about that once we get there.

--- Paper process ---

BRETT

8:07 Okay? So it sounds like let me ask you this if I can show you guys today during the demo, how we can help you guys get rid of a lot of that manual entry you're doing today? Give your text and easier way to know what they're actually doing on site... for quoting, make that less of a manual process and manage your guys service agreements and really just get your information back to the office faster so you guys can get your bills out quicker. Do you have a time line that you're looking to get this role?

KEITH

8:38 Well, the two owners are both on vacation, so nothing could be kind have approved without them, you know, here in my feedback on it.

--- Implementation and ongoing support ---

KEITH

8:49 Ideally, I think the goal was to start, you know, to have 2023 onto a whole new system because I know that there's going to be a transition period of implementation and change it, you know, migrations and all that stuff, setup and testing. So ideally we can get it started beginning of 2023. So we start fresh on something that's what their goal was.

--- *Accounting integrations* ---

BRETT

9:10 Yeah. And is that for both service software and accounting?

KEITH

9:13 Yeah.

BRETT

9:14 Okay. So let's just...

KEITH

9:16 Probably more so the accounting side because at this way they start to your fresh with, you know, on a fresh set of books, but I mean, it's happened before that great, but I think that's the ideal goal.

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

KEITH

9:26 Okay.

BRETT

9:28 Yeah, that's a good plan. And that's what we hear from a lot of people that come to us pretty much at this time of the year as well. Hey, we're looking to get started January 123. So essentially I can do that. But at service trade, we have a concept of a service delivery window that's essentially mean that's the earliest we can get you all started earliest start. They have available as of today is 715. So July fifteenth, you would have a 90 day implementation window. So you could expect to go live like October fifteenth. Those dates are probably gonna push out by the time the owners get back, but I do just want you to know you will have about a 90 day lead way for implementation.

--- *Purchase decision* ---

BRETT

10:08 So if you want to be live January first, it's in your best interest to make a decision sooner rather than later.

KEITH

10:15 Right.

BRETT

10:17 And what are your owners names?

KEITH

10:20 On and Dennis.

BRETT

10:24 Dennis, okay. And so you guys are, I mean you are actively looking at this, thinking about this. Have you guys thought about?

KEITH

10:34 I don't mind what our controller is sitting next to me also, Warren, he's viewing this as well. He could probably answer that part of it. I don't know what their budget kinda is. I really don't we really, we've only looked at one other software so far and they asked me to look at you guys as well. So as far as like what they're looking for pricing wise, I couldn't tell you. Okay?

--- Purchase decision ends ---

BRETT

10:59 So maybe that's a conversation we need to have with John and dentists, and your controller as well. I don't I'm sorry, I didn't catch his name.

KEITH

11:04 And he's sitting at, he's here right now actually.

BRETT

11:06 Awesome. Well, welcome.

KEITH

11:08 So probably chime in with a couple of questions?

BRETT

11:10 Perfect. And then my last question for you guys before we get started, you said you looked at one other software, would you guys look at?

KEITH

11:17 So, BuildOps had reached out to us? Okay? They showed us a demo, gave us some pricing and... obviously, we're not going to go with the first one. We see. We're checking out other ones too.

BRETT

11:30 Yeah. What would?

KEITH

11:31 You guys came recommended from? Because as we do a fair amount of work with them. Yeah.

--- Type of work ---

BRETT

11:36 Of course, what was Keith? What were your thoughts on BuildOps?

KEITH

11:41 I mean, from what I saw, everything their software, I mean, like a lot of them, it looks pretty good. I'm sure you guys are probably doing a lot of the same stuff. They're geared on the commercial side as well because we don't do any residential.

--- Purchase decision ---

KEITH

11:54 So everything you're probably going to show me is going to be probably the same, which is good as long as it does what we needed to do. And when it comes down to, I guess pricing to the owners, whichever one gives us the most bang for our buck, that's what they'll probably go with.

BRETT

12:07 Yeah. Okay. That sounds like a good plan. One thing I will mentioned before we get started guys is I'm sure you'll have questions throughout the meeting. Feel free to fire away those questions at me as they come up a lot easier, answer them while they are top of mind versus waiting for the end.

--- Purchase decision ends ---

BRETT

12:21 And maybe we forget our questions that cool with you guys. Yep. Alright. So that being said, let me go ahead and share my screen with you. Just start with some slides and then we'll jump right in.

BRETT

12:38 With this off. Alright, you see that screen Keith?

KEITH

12:43 Yep.

BRETT

12:44 Cool. So service trade, we are a service management program designed specifically for commercial service contractors. So to your point earlier, no, we're not working with residential contractors, anything like that, but we're working with skilled contractors. So no pest control companies know, landscapers, pool, cleaners, anything like that. We specialize in both the mechanical and the fire protection space. But as of today, we have somewhere between 859 100 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. So really at the end of the day, companies are coming to us to grow and scale their business, which leads to be here into my mission statement, which is to help commercial service contractors be more valuable to their customers. And at the end of the day grow that business. And Keith, do you guys know if you have growth plans?

KEITH

13:37 Yeah.

BRETT

13:39 Look like. Well, yeah, the goal.

KEITH

13:44 I'm sure the owners have a goal of grow into, you know, being one of them. Obviously, we feel we are one of the premier companies out there. We do a lot of specialized work. So there's not a lot of things that not a lot of people that do some of the things we do. Yeah, we have grown a lot. I mean, we've gone from seven, eight texts in the field up to 17. So we've been growing the past couple of years.

BRETT

14:06 And...

KEITH

14:06 We anticipate corona even more.

BRETT

14:08 Yeah. And that's something we just want to help you or assistant along the way.

--- Customer engagement ---

BRETT

14:12 And you'll see that as we go throughout the meeting today. So another thing we wanna do for you guys is your in service. We want to turn your service business into a customer service business. Because realistically 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 they're pretty important and how we focus on that or what we like to look at is what I call the agent online customer service. And guys,

what I like to relate this to is have you guys ever ordered something I'll say, for example, Amazon prime, yes. Why do you use it?

KEITH

14:49 Right. It's easy to use?

BRETT

14:51 Exactly, right. It's easy to use. From the customer point of view. That is the same exact level of service that I'm trying to help provide to your customers in the commercial mechanical space, whether it's sending a quote out, sending an invoice, we wanna make it really easy to approve that quote or pay that invoice from the customer point of view, making you guys essentially the premium brand in your market versus working with, you know, the mechanical contractor down the street that is still using paper tickets and that's really hard to get in touch with, really hard to get quotes, approve, things like that. We're really coming at you from the customer engagement side of things with service trade. So some different ways will help out with that. First off your guys. We have interrupt notifications. This is really that first touch to the customer, letting them know you are on the way. Both Keith and Angela. I sent you one of these about five minutes before our meeting to your email, but it's essentially told you, hey here's, the technician that's coming out and here's his EPA.

KEITH

15:45 Okay.

BRETT

15:48 Next up, we've got online quotes. So yes, your technicians in the field, they might be finding a lot of efficiencies. You guys also have a lot of estimates and quotes to make for your customers. Any way. If it is a matter of logging those deficiencies in the field, we wanted to make it really easy for technicians to track those from their mobile app. Easy for the office to go ahead and create those quotes like you're seeing on your screen right here that the end of the day to my point earlier, make it really easy for that customer to come in here and approve that quote. They'll simply have to buttons on it. They can approve it or request changes. But probably the most important thing on these quotes right here are these pictures. Customers tell us that when they're including anywhere from three two five pictures on their quotes, they're seeing increases of 30 to 40 percent and repair revenue year over year. The whole idea there is, hey, let me show the customer what I'm actually performing for them. What the problem is that's going to shift the conversation from strictly the price to the problem man? It's all about telling that story because they hire, do you guys for a reason? They're not climbing up on the rooftop units? They don't know what's going on up there. Next steps, we've got service link. This is essentially a fully encompassing post service report that has the ability to go out to your customer after the work is complete. So it can tell that customer things like, hey, what tech came out? What did he do on site? What did he use? It's? Also gonna have any PM checklist if my text out, his work signed off on as well as any deficiencies.

BRETT

17:22 Then we have service portal. This might be something you guys start with. This might be something you guys grow into essentially something that will go right on

your website where your customers can come and log into your website and see your entire service schedule for them specifically.

--- Customer engagement ends ---

BRETT

17:35 But as well as any service history. So if you're managing their locations and their pieces of equipment, this is where they will come in to see what you've done to them in the past.

BRETT

17:50 And last step here, we have invoice link. I know you guys wanted a software that had the capability of sending invoices to your customers.

--- Invoicing ---

BRETT

17:58 We do have that capability. Even though we're a service software. I'm not gonna replace Quickbooks for you or the accounting system for you. Whatever you guys pay by invoice link is essentially just a way to take payment from your customer has this really easy pay now button where customer can come in and pay you guys for the credit card or with AC.

--- Customer engagement ---

BRETT

18:14 H. And customers utilizing this feature today tend to see about a 15 to 20 day improvement in their outstanding a are balance.

BRETT

18:27 And now everything I've pointed out for you guys here today, on these slides at the end of the day, they've helped our customers significantly increase their revenue. On average. Customer saw about a 23 point four percent increase. Keith. I know you said you guys have been growing like crazy over the past couple of years, but what would the owners think about that kind of increase?

KEITH

18:45 Really like it.

BRETT

18:46 I'm sure if they would too. So let's go ahead and jump in and show you guys how unless you have any questions.

--- Access to information ---

BRETT

18:57 Hi. So first thing to point out guys is service trade is a 100 percent cloud based system. All I need to access it from the office is internet access in a browser. All my technicians need is some type of mobile device, whether that's iOS or android, you guys pay.

--- Access to information ends ---

BRETT

19:12 So the first thing you're gonna see in service traders this service dashboard, which is really giving you visibility into your day. So you've got your daily schedule with all your technicians, the jobs and the respective locations there go into. But this pages also given us the status, follow different work orders. So any overdo jobs let you guys know front and center that, hey, you need to schedule these and go delivered to your cost... jobs that appointments during the next two weeks is just, hey, it's about to be overdo, let's schedule and before it makes it to that status.

--- Tech On-site ---

BRETT

19:45 But this one's really important. So past jobs to be more complete. What this looks like is your text goes out in the field, he or she goes through complete their work order, does their PM checklist finds whatever they need to fine. But once they clock out from the field, that work quarters gonna bounce back to this bucket right here. It's gonna allow someone from the office to come in review. It, make sure everything is correct. Once the office, make sure everything is correct and we complete it, it's simply falls down here to our completed jobs to be invoice telling us, hey, we got to build these out of service trade or we get a push them over to accounting.

BRETT

20:22 And then last thing on this page is going to be current tech locations. So we are based down in Durham, North Carolina. How tech locations work? Is it, it's based off your technicians mobile device. So when a technician make the clock event, we're going to essentially take a Geo snapshot of where they're located.

--- Tech On-site ends ---

BRETT

20:39 And then drop a pin on the map. Like, so does that make sense? Yes. Hi. So this is really that main dashboard. Do you guys have any questions on what you see when you first open up service trade?

KEITH

20:52 Well, it like does it move kinda through those, some of those boxes on its own? Like you have the obviously the daily schedule you overdo job. Like if I think technician check things off. Well, it, that's when it'll move down or do we have to manually move those?

BRETT

21:08 Yeah. So basically with overdo jobs, essentially, you guys are going to put your jobs in on a recurring basis that you go out, say, for example, your PMS maybe I've got it. Yeah, got a quarterly service on the rooftop. Yep, it's gonna come in here based on when that job is do for you guys. That's automatic. This one is also automatic for this one right here. When your technicians mark jobs complete from the field, that's when they fall into this bucket. But as far as you guys creating the invoice, it is a manual process as far as the office saying, yes, this job is complete, go into.

KEITH

21:40 Right. Okay.

KEITH

21:44 Question about will be question the gentleman here, right?

KEITH

21:49 We should, we didn't get to that point yet.

BRETT

21:53 Yeah, we'll get there.

--- Recurring maintenance ---

BRETT

21:56 Hi. So what I set up for today guys is I set up a Brett preventative maintenance job in service trade. It's the same thing as the work quarter. So this is our digital work order before we get crazy into this. I am going to show you kind of our data model. So, because we're built for commercial contractors, you're going to have your ship to information on the left and your Bill to information on the right? I'd imagine that's how majority of your customers are set.

KEITH

22:18 Yeah. We have obviously a... customer and a site information is sometimes obviously that we have certain customers with multiple sites. So the billing goes to one specific spot which is basically their customer information side is where the guys are gonna be working on.

BRETT

22:39 Perfect. That's exactly how we're setup. So right here with excelsior corp, this is my Bill to, I only have one location, but if I had 10, they would just be listed out below and I would manage these 10 locations under excelsior. But today we're working at comcast center, and this is our location page is essentially going to be your record of truth for any given customer. So at the very top, yes, I'll track contacts and I'll have every contact at this location. But most importantly you'll have services. Is there anything I actually delivered to my customer? So whether it's repairing a deficiency like you can see up top or as I scroll down, I do get more into my recurring work and along the lines of your guys service agreements, this is where you're gonna put all the work. And so whatever you guys agree with your customers on service

agreements, quarterly, annual, semi annual as you put them into service trade right here. And I'll pull one of these up. If you focus your eyes specifically on these tabs right here, you're gonna pick how large is the service scheduling window? Do I get it done today on the 20 fourth, the whole month of June or a custom date range? And then how often should this occur? If I wanted to make this a quarterly service? I would just come in and hit monthly every three months. And then service trade would remind me every three months to go out and do this job.

KEITH

23:58 Well, it would automatically pop up on our job list or service board.

BRETT

24:02 Exactly, right.

KEITH

24:03 Okay.

BRETT

24:05 And then asked that I actually have one other thing to show you. So... service ops basically, you guys would come in here and run this report called service opportunities for whatever parameters you want to select. Maybe I search for recurring services because next month... basically what this report just did is it pings all the locations and look for job that I have do within these parameters. You guys would then come in here, select what you need to slack, pick the job type. I selected recurring services. So I'm gonna hit these always PM... and then just to show you, hey, I've got six different jobs. I gotta do at costco. We're going to put them all on one ticket for you guys because they're all do in the month of July. Doesn't make sense to send multiple trucks that location in a month?

--- *Recurring maintenance ends* ---

KEITH

24:54 Right.

BRETT

24:55 So from here, we would simply create these jobs and they would fall over onto our map based scheduler where you could actually go ahead and schedule these out. And let me just filter this for you. So those jobs from service opt fall onto this map as the gray pins and let's go up here to long island. So they fall as this gray pins are just telling us that job there on assigned an unscheduled. And that's exactly what we're here to do today. Just like this. Then all your tests are going to be over on this left hand side. They're all gonna have a color associated with them. So that's how we know which text go into which pin or job. But as far as this gray one, let's say I want to send Tam, it's a simple drag and drop of Tim to that it turns orange. And then it's a matter of drag and drop it down to the schedule of when you want to send him to this job. So you can see at gain that calendar in the actual pin that's just letting me know that, hey, when I click on it, it's now got an appointment for 625 at eight a M. With Tam. Is my technician?

BRETT

26:01 How's that look? Rescheduling?

KEITH

26:06 That was pretty easy. I mean, that's Angela's forte. She does a lot of the scheduling solid, her answer that.

--- Recurring maintenance ---

BRETT

26:13 Very easy. Awesome. We like that. Do you have any questions? Any concerns?

KEITH

26:21 No, not at the moment. Okay?

BRETT

26:23 Yeah, perfect. So, yeah, that was just a real quick look into scheduling but I wanted to make sure I showed you that service opportunities report which came from services. But below services, we have jobs really just the list of every single work order you guys have done or expect to do at this location... like getting into assets.

--- Assets ---

BRETT

26:44 Keith, when we were talking earlier at the beginning of the meeting, you talked about how you guys are tracking, you know, make model serial, have all the equipment you guys work on. We're going to do that too. We call those assets in service trade. And so for example, we put whatever assets you guys have into service trade and as much information as you guys have, it doesn't really matter like this one. I don't have any information but the units still in here. And then the top one, I've got a ton of information. So none of these fields are required. But you guys put in what you have, but tracking assets and service trade just allows us to track really Rich service history. So if a customer ever had a question, what happened on rooftop unit one, I can click on that from the office or from the field and tell that customer, every service, every job, any deficiencies or any quotes found on this piece of equipment.

--- ST app contracts and pricing ---

KEITH

27:35 Okay.

BRETT

27:40 And then from there, a couple of other things to point out, yes, you will have a list of all deficiencies and all quotes found at this location. But contracts you were talking about markup rules, things like that, your excel sheet, we call that contracts

and service trade. This is not the service agreement. However this is contract pricing. Essentially, you can make as many contract price lists as you want. And you can default these to your customers inside of service trade, it can be done one or two ways. Yeah, it can be percentage wise, markup rules or it can be individual items priced out. But that way when you go to send a quote or an invoice, the correct prices are displaying based off your guys unit costs.

BRETT

28:26 Does that make sense?

KEITH

28:29 Yeah. I mean, essentially, that would these be under like we have quotes contracts? Like if I have a fixed price job, is that kind of where this would fall under?

BRETT

28:42 No. So contract, this is really just the pricing matrix. So if I were to click into one of these... it's basically like, hey, this one specifically is individual parts are just priced out. So, okay, this contract is applied to this customer at comcast center, and I sell them and whole gasket. It's going to be eight dollars for them. It might be four dollars for someone else. But for this customer definitely that's what it's going to be.

KEITH

29:09 Okay.

BRETT

29:12 And contracts will make a little bit more sense once we get into quotes and invoices as well. But from there, I showed you a good amount of information on this location page. Do we have any questions guys?

--- Tech On-site ---

KEITH

29:25 So far? Nope?

BRETT

29:28 Okay. So what I'm gonna do with you is I'm going to go back to that work order I set up and I'm gonna take you through the process of one showing you the work order from the office. We're going to go out to the field via technician, will then come back to the office.

--- Recurring maintenance ---

BRETT

29:40 We will quote a deficiency. We will invoice the job and we can end with a little bit of dispatching does that.

KEITH

29:46 Work.

BRETT

29:48 All right. So what I set up for today is this quarterly PM on rooftop unit to how service trade is setup. Is you have this little drop down right here, which we call service granularity essentially allows you to tied the correct parts, labor job items, attachment and comments to the individual service that hand and that's really important because you can put multiple services on one ticket.

--- Assets ---

BRETT

30:12 You guys work. I mean, you guys are commercial contractor, you're working at large facilities. I'd imagine you're working on more than one rooftop unit, and at a given time, right? Yep, exactly, right. So put as many as you want on one ticket. But any pictures they take, you want them tied to the credit piece of equipment for record keeping.

--- Quote templates ---

BRETT

30:29 So that's kind of what we're doing here. As I scroll down, I do have a list of all my parts, my labor, my job items that I expect to use, my technician very well might put more stuff on here from the field. So from here, I will actually take you out to the field.

--- Tech On-site ---

BRETT

30:47 And I'm currently on an iPad today, guys. Like I said, iOS or android, you pick it. But we're working at comcast center. The first thing I do is click into it and I see that I'm clocked in and route. So I'm probably going to go ahead and clock in on site as the technician that's just going to track my hours in the background. Now, as far as what I need to actually perform on site and clicking up into services, which is telling me that exact verbiage that you guys just saw from the office. So this is what you want your text to do on site?

KEITH

31:18 Hi, this is more or less what you're showing us what the type is going to be seeing on their end?

--- Customer engagement ---

BRETT

31:23 100 per cent. Yeah, I'm being your technician right now.

KEITH

31:25 Okay.

BRETT

31:29 Hi, I'm from here, you've got attachments. Like I was saying before telling the story to our customers is really important. Show them the work that you did for them. So a lot of our customers are coming in here and doing like before and after pictures.

--- *Deficiencies* ---

BRETT

31:45 I can take as many pictures as I want right here. I can also do videos. I can also do audio recordings. Anything that's going to be beneficial for you guys. But down under job items is where they're going to track the material. So here's the five items that were initially on the ticket from the office.

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

BRETT

31:59 However, you know, my technicians on site and he realized that he needs to use a widget. You can come in here and search for a part. This is going to be your guys part list in service trade. I'm going to grab that widget. I can pick the quantity and permission based.

--- *Assets* ---

BRETT

32:15 You can allow technicians to see pricing from the field or it can just zero out everything and service traits permission based though.

BRETT

32:26 From there, if I click into assets again, assets, are those pieces of equipment. So here with rooftop unit to given my technician a little bit more information. So, yeah, he has all the information about this piece of equipment if you need any of it. But he also add his fingertips has service history. So here's every single work order I've done at comcast center on rooftop unit to over its entire lifetime. So if I wanted to go back to 2021, see what happened, I could see, you know, what was done here. Looks like the same thing we're doing today. If there were any pictures taken or PM checklist, they would be here. It looks like I picked a bad one because there's none, but technicians do have access to all of that information at their fingertips. How would a technician having last year's PM or last quarters PM benefit them?

--- *Paper process* ---

BRETT

33:19 Wait, say that again?

KEITH

33:21 I have to call me and then I have to go through.

KEITH

33:24 That's true.

BRETT

33:27 Okay. So I like to call that Angela, the phone call rodeo because a lot of times when your technicians call you, I'd imagine you're busy in the office and you can't take that call right away, right?

KEITH

33:37 Yeah. Sometimes.

BRETT

33:39 Okay. The reason, I, yeah, that's kinda the reason I call it phone call rodeo because if you can't answer, then he's waiting on you and then maybe he can answer and it's just back and forth. Why not just give them that information? I just fingertips so he can speed up his process and get that job done.

--- Forms ---

BRETT

33:56 Awesome. So from here, let's talk about those checklists a little bit. So I told you I'd talk a little bit more about that right here, under view, more details. It's gonna do exactly that. Just show us a little bit more information. And what I'm gonna do from here is hit actions and we're going to go download blank paperwork. So how this works guys is we are not going to provide you guys with the forums that your text are gonna fill out on site. However we are going to take your forums and make them billable PDF inside of service trade. Basically, you're not gonna get all five forms dispatched right here. Your forms are going to be set up to be dispatched based on the job you have at hand. So if it's a rooftop unit job, you're gonna get the rooftop unit. Does that make sense?

KEITH

34:42 Yeah.

BRETT

34:44 So just to show you what this looks like when I hit generate, what we do is we open this up through Adobe acrobat, which is a free app just enables us to smart fill this form on site. And what I mean by smart, Phil is, hey, there's my asset here's. All my job information. Well, it's smartphone, all this information from inside my service trade account. So my tech doesn't have to fill all that out because that's a waste of time. Easier to just do is PM. So whether it's checking off the boxes like so we're writing and information, you can do exactly that. But on this Keith we talked a little bit earlier about what one thing I said was the digital Hancock making

technicians do things prior to them leaving location. With what our showing you right here, this is called blank paperwork. This does not require your technician to fill it out prior to leaving location. What I like to refer this to his JV forms. We have another product it's called service forums. I like to refer to those as our varsity forums. Where it is the digital hand cops. Essentially, when your technician clocks into a job, they get dispatched to form and they cannot leave that location until they fill out every question that's required on that form. It would require another meeting for us to go through service forms just because I need to get all set up for it. But knowing this information now, I'm under the impression that you would lean more towards service forms?

KEITH

36:07 Yes.

BRETT

36:08 Okay. So I'm gonna write down in my notes right now, one of our next steps very well might need to be a service forms demo.

--- Tech On-site ---

BRETT

36:16 And that should take 2025 minutes... from here just to show you this process as well. If it were, you know, the technician was using blank paperwork, it would just be a matter of sending this back to service trade. So when I hit add to service trade right here where we already know we're clocked in at comcast center.

--- Deficiencies ---

BRETT

36:36 So it's just a matter of uploading this back to our job... from there. Though. Let's say my technician did find some deficiencies, maybe he found a broken compressor. He can come in here. Doesn't have to be crazy descriptive with it. And it's important to point out he can also do a talk to text if that's easier on him... but not being crazy disagree because I'm coming behind it and I'm adding more detail. So I'm coming in, taking a picture taken a video, I'm telling you guys in the office what you need to quote out for this customer... and our customers really like the audio recording function because it's quicker. So I can say, hey, Keith, I ran into a broken compressor under top to, I need to do XYZ to fix it. It's gonna take me about three hours, a lot of information. I can tell you in a couple of seconds. So from here, I'm gonna mark the severity. We're going to call this inoperable. We are gonna tied it back to the asset that we're working on giving us that really Rich service history service trade knows this is an H back job. So our last step is to just mark the status and we're going to call this new today.

--- Customer engagement ---

BRETT

37:47 Any questions on deficiency creation? Okay? I think personally deficiency creation is extremely important and service trade because we recently ran a study

based on some of our customers that were alive between 2020 and 2022 fully live fully on board at all that good stuff. And what we call pull through revenue, which is essentially you go out to do some work but you find efficiencies and send more quotes out to your customers is the number one ways that our customers are increasing their revenue.

--- Quoting ---

BRETT

38:18 And especially if you're taking a couple of pictures of those deficiencies, you're not going to get every single quote approved, but chances are a couple of those will get approved. And then at the end of the day that's just more money in your guys pockets.

BRETT

38:34 From there, Keith, are you guys getting your work signed off on after it's complete?

--- Tech On-site ---

KEITH

38:39 They're supposed to, yeah.

BRETT

38:42 So they can come in here and do create work acknowledgement. Essentially, they would select their onsite contacts. So, Keith, I'll select view. And as the tack, I would come through all these fields and just make sure I did everything I said. I did this button right here is we're permission based setting. If you don't want text to see it, we will completely turn it off, it'll disappear... but I'll hit this review button at the top and I would essentially turn my device around to my onsite contact. So Keith, you would come in and review everything, make sure it's correct, acknowledge it. And I would get your signature right after that... complete that you're going to get a copy of that in your inbox. It's also gonna show up on the service trade job in the office... but that was a pretty high level overview of the mobile application. Do you guys have questions, concerns, comments here?

KEITH

39:37 Trying to think, you showed me how to where they were able to add things as far as parts that they used, their little blurb as far as what they did, their hours are pretty much in there when they clock in and out.

BRETT

39:53 Exactly, right. We're tracking that down here. And once that clock out at the end of the job, it goes back to the office.

KEITH

39:58 Okay. Okay. And so that's basically their work or their paperwork, essentially the report they filled out. You know, I'd like to see what it looks like back online and when they finish in, clock out and everything.

BRETT

40:12 Do that.

KEITH

40:13 So, sorry... for hours.

BRETT

40:20 Right.

KEITH

40:21 So...

BRETT

40:22 Let me just do a quick refresh right here. Alright. So right here on the job, we're back in the office now job status as in Progress. However down under the appointment, it says completed that's because as the technician, I just hit, yes, I am done with this service. Go ahead and billing. So where this work order is in your service trade account right now, is it in that past jobs to be more complete bucket? So you guys would come in here, review it. We realize that hey, it looks like Brett added two widgets but he didn't hide them to a service. So maybe we go and fix that. I used these widgets under this service. And it looks like, hey labor hours. I don't have any pricing in here.

--- Tech time tracking ---

BRETT

41:06 So basically, I'm just gonna replace this one for you guys. You all your technicians can have different labor, our labor rates inside of service trade. For example, Matt is 54 dollars an hour. That's how I recommend tracking on the actual work order with the labor. But you guys can come in here and make any manual adjustments that you need to.

--- Tech On-site ---

BRETT

41:25 If the pricing is incorrect... we'll save that in, but talking about clock events. So, yes, here's my clock events from when I was the technician onsite. I was clocked in route for 35 minutes onsite for nine minutes and it tells you that, hey, Brett was 340 Miles away from comcast center.

--- Deficiencies ---

BRETT

₄₁:₄₅ So that might be telling you guys in the office. Hey, I gotta go have a conversation with Brett. What in the world was he doing? He was not at location... but down below that, hey, that deficiency are reported on site is going to be found right on the work quarter, but it's also, you guys are also gonna get an email notification of that. So inoperable deficiency reported at comcast center. There's my broken compressor. And here's this link that takes you guys right into service trade to go and quoted out. So, you see that, hey, your technician reported this broken compressor tied to this job. Everything in service trade is going to be hyperlinked making it really easy to find things. You've got related deficiencies. So if I see all these other broken compressors here in the past year, I'm probably looking a little bit deeper into that one to see what's going on. But down at the very bottom, hey, there's my picture and my audio recordings. So the person who is doing the quoting knows what they're actually going to quote out.

--- Quote templates ---

BRETT

₄₂:₄₂ So we're simply going to add this to a quote right here. You guys might throw an expiration date. And I'm sure prices are changing like crazy right now... exactly. So right here, we have our quote. It's pretty blank right now. You guys are more than welcome to come in and type whatever you need to type right here. However we're really big fans of saving time at service trade. So we really liked this apply quote template feature where if I type in compressor, I have a template for compress the replacement right here. And these are going to be your guys templates in your service trade account. You're not gonna get my templates... but this is just the general description of work I do on this type of repair along with all the parts of the labor, the job items I expect to gifts. So we add that in this quote at this point is pretty much created, but I might come down here to my parts, my labor, my items and number one, let's pick the level of detail.

--- ST app contracts and pricing ---

BRETT

₄₃:₃₄ My customer's going to see on this invoice or on this quote. And then back to those contracts. Keith, if I were to change this contract, it would essentially just try to change the, or the price or the marketing. Like it looks like these are all the same. Though, that was bad one.

--- Quote templates ---

BRETT

₄₃:₅₂ So we can change that. It looks like, hey, I don't have pricing on this one. So let me fix that and let me fix that, delete that one. So we can see our gross margin is 73 percent. Keith. If I'm you, I'm thrilled about that one to her going to save that in and I'm simply going to send this out to my customer.

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

BRETT

44:09 So Keith and Angela, I'm gonna send you both a copy of this just so you have it before I do that, I can pick and choose what actually goes out to the customer. So maybe my technician, Brett Hurst a little bit, let's turn that off customers need here... but I will send that to you guys and to either of you have access to your email today.

KEITH

44:27 Yeah, I actually just came through.

BRETT

44:29 Awesome. Yeah. If you can pull it up and hit that view and respond to quote, you can see exactly what it's gonna look like from your customer point of view. And for anyone else in the room, I'll pull it up on my screen.

KEITH

44:51 Okay. Yeah, I see.

BRETT

44:52 It... and where it says aardvark service, gonna say PDM group, but what are your, what are your initial thoughts?

KEITH

45:01 That's pretty quick to do, which is great.

BRETT

45:05 Exactly, right. Saving time on both the office side and the customer side, right?

KEITH

45:09 Yeah. Now, the pricing that's on there or is that... where does that come from?

--- ST app contracts and pricing ---

KEITH

45:16 As far I know, like how does that put in there? That put, is that price like my cost for those parts or is that already like my cross post the more?

BRETT

45:25 On this quote, the unit price, does your cost plus the markup your customers never gonna see your, you know?

KEITH

45:30 Right. Okay. So as far as my mark, like how do I input, how would I like my markups on there?

BRETT

45:37 So that's exactly if I take you back to the quote screen, when I was, I already sent this quote out when I was changing that contract. It was applying the different contract price rules. So contracts and service trade are defaulted to customers. And it essentially takes your guys unit cost, applies those markup rules and gives you the unit price for the customer automatic.

KEITH

45:59 That's what I want. Like where would you put the markup rules in there? I know that's more on the office side than the text side. They don't see that you want a different tab to set.

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

BRETT

46:08 Do you want your customers to see them?

KEITH

46:11 Exactly. Nope. Nope. I was just curious how you set that up?

BRETT

46:19 Yeah, setting it up a service contract. So, this is something we're going to help you guys with during onboarding. But essentially, I would go through there's a couple of different contracts I can make.

--- Quote templates ---

BRETT

46:29 I would probably make like a default contract and I go in, it's a lot of different drop Downs that you guys are going to fill out. Once I create this, I would go into editing it and that's where I put in, whether it's markup roles or whether it's individual pricing I put it in.

--- Implementation and ongoing support ---

KEITH

46:45 Okay.

BRETT

46:47 And this is something it's not gonna make a lot of sense right now because you're not trained on how to use number one service trade or how to really do anything. But it's important to point out during the implementation process. You guys are going to get trained, how to use absolutely everything in the system. And then you're gonna work with the project manager to get your contract pricing setup for customers.

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

KEITH

47:06 Okay.

BRETT

47:09 So, Keith, if you can go ahead and approve that quote for me, I can show you how we turn it back to a job from the office.

--- Quoting ---

BRETT

47:28 And...

KEITH

47:28 Then...

BRETT

47:30 Alright. Thank you for approving that. Are you looking back at my screen? Yeah. Alright. So quote status, right? They're all it did is it changed from submitted to approve? I've got this really cool quote history tab showing me here's, Brett in the field, adding that picture that recording. I sent it to both of you guys. But Keith, you're the one that viewed it with this IP address and you approved it with po number one two three. So kind of like having a paper trail even in the digital world with this quote history right here. A lot of people are, a lot of our customers are telling us, you know, the customer reaches out and said, Keith never sent me a quote for XYZ. You can come in here and say, well, mister customer, you viewed it three times today. So I don't know, tell you... but from here, it's really easy to either add this to an existing job if I'm already going to comcast center or create a brand new job. From this quote.

--- Dispatch ---

BRETT

48:22 Your po would copy over. I would copy all attachments and all comments. I even have the ability to create a budget for this job if need be. And so we just created the job. The next step is to actually schedule it with that process we went through earlier as far as the map, a scheduler.

--- ST app contracts and pricing ---

BRETT

48:40 But if you guys did want to see the budget, this is a newer feature and service trade based on whatever you quoted out can fall into this budget and just help you guys better track your margins. Things like that.

KEITH

48:55 Right.

KEITH

48:56 Yeah, this is from a cool.

                                    KEITH

48:58 Customer seeing all this stuff.

                                    KEITH

49:01 No, no.

                                    BRETT

49:02 Hi, this is.

                                    KEITH

49:03 All the, I saw like what this is, what is the customer ID? I saw this? Let's see
this?

                                    KEITH

49:09 Yeah.

                                    KEITH

49:09 There's the amount of labor at this at labor costs here's. The refer, you know,
cost for this is the total price that they would see and these are already marked up
prices already, not what we pay for it.

                              --- Quoting ---

                                    KEITH

49:21 Are they seeing all this stuff here?

                                    KEITH

49:23 Yeah, you can't you said you can take some of this out. Yeah, they're they see all,
this is a quote that they would see that I approve. This is what they would get.

                                    KEITH

49:36 That's... for some customers requesting them.

                                    KEITH

49:42 On our end, yeah, someone to see all that stuff.

                        --- ST app contracts and pricing ---

                                    KEITH

49:44 Some don't they just see what, you know, is it on the quoting side is like right now, I just showed just start total cost that's it, no total price. I don't break down the labor materials some of them might have to some of them. I don't that's we can change those, right?

--- *Customer engagement* ---

BRETT

49:59 Yeah, you can change that per customer.

KEITH

50:02 Yeah. Okay.

BRETT

50:09 Any questions? Nope? Okay. So I'm gonna take you guys back to our work order that we just did. In the field, we went through the whole deficiency process as far as quoting it out, what we refer to as that pull through revenue.

--- *Forms* ---

BRETT

50:22 Again, one of the number one ways our customers are increasing revenue. But let's go back to our attachments. So here here's that paperwork that I filled out on site. I know we're going to do that service forms demo probably sometime next week for the varsity forums. But here's that picture.

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

BRETT

50:40 And here's where I got my work signed off on by you Keith. So everything's flowing back to the job in real time once I make sure is everything is correct, you know, parts labor, job items, all that good stuff. I'm simply going to come up here and complete this job and I'm going to complete it and create the invoice.

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

BRETT

50:59 And so I can, I have two options. I can simply just complete the job and we'll create invoices that maybe at the end of the day or the end of the week or I can do it all at once like I'm doing right here. But this is just another area for you guys to review your unit cost, not your unit price, just making sure everything is correct as well as the contract price is correct for this customer.

--- *Invoicing* ---

BRETT

51:21 So when I create this invoices to essentially creating our pro forma invoice inside of service trade for us, our margins are already off. So that's the number one thing I'm gonna look into fixing right now and I can see hey some of my prices just didn't filter through.

--- *Quote templates* ---

BRETT

51:35 This is my demo account. So not everything's setup perfectly... will fix this one as well. We can see we're now making a 35 percent margin. So similar with my quote, I can pick the level of detail that I'm gonna share with my customer. You said you're just doing grand total only let's do exactly that.

--- *Accounting* ---

BRETT

51:52 And if I'm taxing my customers are not, we have the proper tax rates and codes for the jurisdictions that you guys work in that can be provided during onboarding, and you can mark whether certain things are taxable or not. So maybe like detects labor.

KEITH

52:08 On the job?

KEITH

52:10 Yes.

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

BRETT

52:11 Okay. So just, it's just important to point out you can pick and choose what's taxable. So I'll save that in. If there are any additional notes that I want to provide to my customer, I can put that down here under invoice note. But if it's a matter of sending the invoice via service trade, it's simply just coming through and hit send invoice link. And Angela and Keith, I'll send you both copy, but I'll pull this up on my screen so I can talk to you guys through it. And this is exactly what the customer's going to receive from you guys, of course, is going to have PDM group up top grand total. This is going to be your guys t's and c's at the bottom. The customer has any questions, what they owe you 1,200 dollars for, they can click this button right here. This pulls open that service like telling that customer every single thing we did for them for that 1,200 dollars.

--- *Deficiencies* ---

BRETT

52:58 So here's your text that came out here's. What he did on site here's. What he used. Hey, mr, customer here's, your PM checklist here's. Where you signed off on

the work I did for you. And here's a couple of pictures we took on site. And by the way here's, an open deficiency we've found with some pictures and videos.

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

BRETT

53:14 You can expect a quote from us soon if you haven't gotten there. Alright. But Keith, you know your customers a lot better than I know your customers. How do you think they're going to react to this level of post service report?

KEITH

53:29 Probably like even seeing just a lot of male go ask for picture. Sometimes I'll text them or email a picture of some, something that though... that's found.

--- Customer engagement ---

BRETT

53:39 Yeah. And that's kind of where this whole service link came from. A lot of times in the commercial space, people are asking for more information and that's where service trade coming from with, hey, yeah, we want to provide a better service and help you guys streamline your operations.

--- Invoicing ---

BRETT

53:52 But at the end of the day, we wanna make it easier on the customer. Did you work with you guys? And if we're sending them all the pictures from location without them even asking, that makes you guys have premium brand?

BRETT

54:06 Okay. And then from this invoice, the last thing here is they have this pay now button where customers can come in and pay you guys to the credit card with a. CH. I would just go ahead, fill out my information. Whatever I need to do with this. I would pay you guys. We utilize a payment processor called stacks STA X to make this happen. Essentially. When your customer pays you via invoice link, your money goes into the stacks dashboard. You guys would then reconcile between the stacks dashboard in the accounting system that you also?

--- Accounting ---

KEITH

54:38 Site. Is there an area where I set up the tax ability of a customer according too, so.

BRETT

54:47 Certain areas and set up the tax ability of a cost. Can you?

KEITH

54:51 Customer customer, and this I'm in New York. We're doing work in New Jersey for him. Okay. We're going to charge a New Jersey sales tax tactical customer?

--- Accounting ends ---

BRETT

55:05 Yes. So there is an area to put that are put that in that's something my implement excuse my implementation team is going to help you guys with kind of based on whatever you guys need. If it's where we're delivering service, will give you that text rate. If it's where we're providing service, will give you that tax rate.

--- Accounting ---

BRETT

55:24 And I can find you some documentation on that. I think I have a article about that for me. Write that down.

KEITH

55:33 We were really registered to collect sales tax in New Jersey. We do work outside of New Jersey. We do not charge sales tax even though the, even though the customer may be located in New Jersey.

--- Accounting ends ---

BRETT

55:47 Okay. Yeah, no, we can definitely set that up for you guys. And I'm just, I don't wanna say the wrong thing to you. So I wanna find that article to give you the most accurate information. Is that alright with you? Sure. Okay. So I will send that to you after our meeting and a recap email.

--- Dispatch ---

BRETT

56:04 But from here, guys, really the last thing I had to show you and I know we're almost here at time is the dispatch board and Angela might be more of your role here, but it's very similar to that map base schedule I showed you earlier. All your text are going to be over on the left hand side. For example, this is me. So how I like to describe it is, this is my swim Lane horizontally across the screen. We just worked on comcast center together. It has a check mark meaning it's completed. But for you, Angela, if I Zoom in these dark blue lines right here, these are your technicians, clock events can see the time, the dark blue that Brett was spent clocked in and route, the lighter blue is the time Brett was spent, clocked in on site. So if his clock event is way past the actual appointment, you know, that, hey, something's probably going on. I might need to call him, but it's also a queue not schedule Brett for any more jobs if that is the case. But this dispatch board, a couple of things, you guys are always going to have available jobs to get done. They're going to be broken up by job type up here. So if it's a matter of you guys wanting to fill all this white space with jobs and make

your text busy just a matter of dragging and dropping. But also from here, it's a really good place to add any emergency calls that come in. So maybe let's see. Comcast center calls me. All my information about comcast center is in here. If they say something is leaking... you tell the customer that, hey, I can have someone out there. It's about 10 o'clock I can have someone there by 11 30 if, you know, what technician you're going to send, great, select them here, if not leave that blank and we'll touch on that here in a second.

--- Quote templates ---

BRETT

57:46 And if the person calling, you know, the asset that is giving them a problem, you guys can select it. Typically, they have no idea. So we can select the building as the default and let your technician figure it out when he gets there. But remember, I did not apply a technician to this, but I will save it in.

--- Dispatch ---

BRETT

58:01 So what happens there? Is that job falls into this on assigned? Okay, which is essentially your guys queue of jobs that you need to go and schedule. So I can see that, hey, we gotta go at 11 30. It looks like Brett will be free at 11 30. Let me drag and drop it to him. When I drag and drop to me, I both get an email notification as well as this job shows up in my service trade mobile application.

BRETT

58:28 How does this compare to the current system as far as dispatching? Angela?

KEITH

58:34 He's...

KEITH

58:34 Actually on the phone with the supplier right now, but it's a lot different in a lot easier.

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

BRETT

58:39 That's good.

KEITH

58:41 You created that job right there like that. I will automatically assigns a like a work order job, number ticket, number, whatever you wanna call it.

BRETT

Exactly, right. That's what I did. I just created the job. So, if I hit details and actually go into the job here's, my work.

--- Dispatch ---

KEITH

58:55 Okay. And once it's assigned to attack, it automatically shows up on... their side of it, correct?

BRETT

59:04 Exactly, right. As soon as I apply, the technician, I can actually go in here and take a second there's. My, some things. We can comcast center for 11 30.

KEITH

59:15 The job was cancelled.

BRETT

59:17 The job is canceled. You would probably in the office reschedule it, right?

KEITH

59:24 Yeah.

BRETT

59:25 So, I would probably, I would number one guy.

KEITH

59:28 Customer, we could reschedule.

KEITH

59:29 It or they might just say on never mind false alarm. I don't need this job pedal.

BRETT

59:35 Okay. So if it's a, if it's false alarm, don't come out, we're simply going to cancel it. If it's a matter of rescheduling it, I'm going to get on the phone with the customer and figure out when a good time for us to go out. That works with my schedule as well as, and I can do that from the map based scheduler or I can just do it right here. Matt, they schedule is a little easier because you can see, you know, what's on the schedule.

KEITH

59:57 Job is totally cancelled.

KEITH

Hey, cancel job, right?

KEITH

1:00:00 There. Yup.

BRETT

1:00:09 And so, nothing's going to get deleted in service trade that's important to point out this job will still be available under your location page. It'll just tell you that it was cancelled.

KEITH

1:00:23 Where do you have one? They're listing of all the open jobs? Sure, partial jobs?

--- *Dispatch ends* ---

BRETT

1:00:30 Yeah. So there's a lot of different things that can be reported on inside of service trade, whether it be jobs, quotes, invoices, customers. But if we take a job report right here, say, I want to show me all the jobs where hearts to be ordered, that's a big one for you guys.

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

BRETT

1:00:48 Parts have been ordered but not received. I can run this report and I've got 325 jobs where I've got parts bordered, but I haven't received them yet. So these are all kind of into to be scheduled, just waiting on parts, but you can narrowed down by all these different parameters here and it can be jobs, job items, job clock, events, different appointments, everything here also can be export it to a spreadsheet.

KEITH

1:01:15 What about as far as I schedule a job, I have to buy material, anything I want to issue a purchase order number for that cannot be done... through this.

BRETT

1:01:26 So with native service trade, what we're looking at today, native service trade will not generate a po for you guys.

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

BRETT

1:01:33 We do have another product that's called partsledger. It's an inventory management and PO processing system. Partsledger will generate the po for you guys. On that. Are you guys tracking inventory?

KEITH

1:01:47 No, not anymore.

BRETT

1:01:48 Okay. So it sounds like I need to show you the peo generation side for you.

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

KEITH

1:01:56 Will will purchase something. We'll issue the supplier a po and then...

KEITH

1:02:01 Really, we.

KEITH

1:02:02 Input the part and the cost onto our system for that. Would that be that's tied to that po number? And it automatically populates to... that job. So when we go to invoice, that's already there?

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

BRETT

1:02:16 Okay. So the tool we have partsledger, it will do the same exact process for you guys. There is a workaround inside of service trade that I can show you right now. And I do want to show you this to see if it's gonna work or if you need partsledger.

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

BRETT

1:02:32 So with service trade reopened this job, a workaround that some of our customers use that don't want to go and purchase the inventory management function of service trade is you can add apart. So maybe I add a widget, I know that I need to order this widget from a vendor so I can select my vendor here and can be done from the field or from the office. We can pull essentially all of your guys vendors and service trade. And for the po number, the customers that are not purchasing partsledger, what they're doing is they're using the service trade job number as the po number. Maybe they're using the last four, maybe they're using the whole thing kind of a process you guys would have to figure out. But I can put that purchase order, that job number as the purchase order number and select the status right here. Let's say we expect to deliver it to get delivered on Monday. I know that's not a po number. It's something that's worked for a lot of our customers, but I wanted to get your thoughts on it Keith.

KEITH

1:03:33 Hello, yep, five vendors and you want the purchase order number the same as a job number that doesn't make sense?

KEITH

1:03:45 What?

BRETT

1:03:45 Part of it doesn't make sense?

KEITH

1:03:47 Five vendors, you're issuing five purchase orders?

KEITH

1:03:51 On the, on the same job you're buying?

KEITH

1:03:53 Yeah.

BRETT

1:03:54 Yeah. I got separate different vendors. I have one customer that's Texas, but they're doing it though.

KEITH

1:04:02 Vendor there like this purchase order from this vendor, it's more or less on the, yeah, the tracking side when he goes to invoice them.

KEITH

1:04:10 Hi, I'm...

KEITH

1:04:11 Trying to pay invoices.

BRETT

1:04:12 Yeah. So.

KEITH

1:04:16 For both what you?

BRETT

1:04:16 Get with what you guys are telling me, it sounded like you're needing partsledger where it's actually going to generate the po for you guys.

--- *Purchase decision* ---

BRETT

1:04:22 That's another thing I can't show you today. I'm just not set up to show you it. But what I can do for you guys is that I think it would be beneficial to combine maybe like a service forums demo and a po creation demo on one.

KEITH

1:04:35 Okay.

BRETT

1:04:37 I think, would you be open to setting that up next week? Yeah. Okay. Yeah. So that's what I have as far as next steps because everything you've seen today that's pretty high level of service trade up. I'd love to kind of hear your thoughts and see what you guys are thinking first of all, right now.

KEITH

1:04:55 It's definitely a lot easier than what we have... and it makes things a lot faster.

--- Accounting integrations ---

KEITH

1:05:01 Well, yeah. On the service side, yeah... I'm interested in one, the, yeah, the accounting side. Awesome. This is ServiceTitan. Yeah.

BRETT

1:05:14 Yeah. So all integrate well, depending what accounting system you guys go with. It seems like you're leaning towards Quickbooks. I have a native integration with both Quickbooks online and desktop and guys, what I'm actually gonna do for you is at service trade.

--- Accounting integrations ends ---

BRETT

1:05:28 We recently invested in this tool. It's called recap, and you guys can still see my screen, right? Yeah. Okay. So what I'm gonna do is this is a space that I'm gonna use to send you guys a bunch of information. It's also going to be like a plan that we can both look at, come in here, see what we've done in the Progress.

--- Invoicing ---

BRETT

1:05:45 Are in the process. So far, I'm going to go through and type all this out and send you guys a link after the fact, but I found it to be just a better place for us to collaborate on this journey. But in the resources section for you guys under, for example, accounting integration, I'm gonna go ahead and put in like the Quickbooks integration video, the Quickbooks sync, settings and data mapping article.

--- Invoicing ends ---

1:06:08 So you guys are gonna have a bunch of resources in here as far as things we talked about today and things I wrote down. Does that work for you guys? Yeah.

KEITH

1:06:16 Yeah.

BRETT

1:06:17 Okay. And yeah, I'm just gonna send you a link and just a couple of cool things that you can do. If you ever have a question for me, type it in here. It's a lot easier than sending an email, anything like that. I'll get a notification. Everything's in one central location, all that good stuff. But I'll be filling this out as we move forward in the process. And then for the time being, we would like to go ahead and schedule a service forums... and partsledger demo... you know, creation... as far as looking at next week, Keith, do you have a calendar pulled up? Yup. Alright. Let's see here. How does Wednesday the 20 ninth look for you?

KEITH

1:07:05 Currently, I am open.

BRETT

1:07:08 And we do a two PM eastern.

KEITH

1:07:12 No, because that's usually we're starting to get bombarded with phone calls from our texts that are efficient fashion up for today?

BRETT

1:07:18 What about 10? Am sure. Alright. Let's do it. So that is 29 10 am I'm going to send the invite to all of you guys that are here today? Is there anyone else you would like to send me that send that back to?

KEITH

1:07:39 Hi, Wilson.

KEITH

1:07:40 More, it'll be involved in that. Okay. Yeah.

BRETT

1:07:46 Yeah, you can forward it to them or if you want to just type your email in here, feel free to do that. I'll add you on all future correspondence as well. But that being said guys, I definitely saw a lot of benefit as far as that service trade can bring to the table for PDM group. I think you guys saw that as well. So what I'll do in the meantime is I will put together all this information. This recap. I'll fill it out. I'll send

you guys a link. You'll have access later this afternoon. I'll send you guys an invite for next Wednesday for the service forums and partsledger demo. We'll go through that will answer any questions. And at that point, it sounds like the owners might be back from vacation and it might be time to kind of bring them in. Yeah.

KEITH

1:08:26 They come back on July. Okay. They're both back in the office at which point I'll be out of the office, but I mean... I'm looking at this part of it, the rest of it goes to them as far as... what the costs are for software implementation costs across all that stuff, whatever that comes to.

BRETT

1:08:46 Okay. And what are, just, so I have it, what are the dates that you're out of office?

KEITH

1:08:50 Hi, I'm out the week of the fifth. So I come back to the eleventh.

BRETT

1:08:53 Okay.

BRETT

1:08:58 Cool. I have that my note. Cool guys. So, yeah, Angela, Keith born. Thank you guys so much for your time today. If you guys have any questions in the meantime, please feel free to reach out. You'll have my contact information. Once I send this email out, but yeah, if you need anything at all, let me know. Other than that. You guys have a fantastic weekend. Thank you for your time today and I'll talk to you guys next Wednesday for our service forms and partsledger demo.

KEITH

1:09:23 Alrighty. Thank you.

BRETT

1:09:24 Got it. Take care guys.

KEITH

1:09:26 Bye, bye bye.

The End