ServiceTrade Demo with Vertech Services, LLC

Quinton Stallings with Vertech Services, LLC
Recorded on 7/13/21 via Zoom, 22 min.

Participants

SERVICETRADE

Quinton Stallings
Territory Manager

VERTECH SERVICES, LLC

Stacie Rountree
HR manager

OTHER

12818388665

Topics

Transcript

12818388665

0:01 Here we go. Hi.

QUINTON

0:05 Hey, Stacey. How are you doing?

12818388665

0:07 I'm great area.

QUINTON

0:10 Hi, I'm fantastic. I'm Stacey, is there anybody else with you?

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0:14 No, unfortunately desk, I had to go on a job.

QUINTON

0:18 Okay. No worries... no worries. Well, thanks for joining me. Once again, my name is quaint, and stallings. I am the south west territory manager here at service trade and Stacey, you are the office manager over at bear tag... right? Alright. Well, my plan for us today was to kind of have, you know, restart our conversations since the last time we spoke, learn a little bit more about you guys, what you guys might be looking for from a service management software solution. After that, we'll take a quick tour through service trade. And then if this, does it like a good fit for you guys, we can break out next steps. Does that sound like a good point?

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1:00 Sounds good. Cool.

QUINTON

1:03 Well, I've got a ton of notes here from our last... last conversation, so I won't let us, you know, go back over everything by did kinda wanna hear a little bit about some of the things that you guys are looking for and what areas are important to you to... to learn more about what service trade today?

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1:25 Really, probably the most important thing is, you know, dispatching the calls and then the text and then all of the data... and... and to the system themselves, you know, try to eliminate a lot of paperwork because right now we do everything paper.

QUINTON

1:49 Gotcha. Okay. And what are some of the things that you're running into on paper that's... that's kinda wanting you to find a better solution?

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1:57 Well, the whole reason for us to find finding a better solution is when tack is going away row over some of the zooms that we've done with other companies like you all... we've found stuff that we like, and then stuff that we don't like. And, you know, one of the things that we do like a lot is right now how we have to do it in Wintac, like when the technicians and service updates and to us, they send them in on a service ticket to our email address and then lead type all of the notes ourselves into the portal. So, and tag upload all the pictures and the one tag attached, all the paperwork, whether it be the service ticket, a PM format, you know, any kind of form that goes with that job. We... we have to have somebody here in the office attaching all of that, typing all of those notes from their service to get into Wintac and adding attacking all of the pictures, everything. And a lot of the newer software that we've seen. And I thought you guys do too is the 10 cents, all of that straight in and it automatically connects to the portal itself. Is that correct? Yeah, we do all of that manually ourselves every single job.

QUINTON

3:23 That's a, that's a lot of work.

12818388665

3:26 Yeah. Moving out. Yeah, we have, we literally have one or two people in the office extra doing that.

QUINTON

3:33 Gotcha. Okay. So eliminating those steps to where you guys aren't having to reenter all that information from the tags. I'm getting that back to you guys faster and more efficient process, 100 percent that's something that we can help with. And it sounds like you've seen that from some of the other software solutions that you looked at? What are some of the things that, you know, you haven't seen and that you're still looking for that hasn't really allows you guys to... to pull the trigger on something. Yeah.

12818388665

4:01 Well, one of the big thing is... is... I'm gonna take this off a speaker is like when I'm printing reports in Wintac right now, I can print my or my, with, you know, every single thing, every single report that I need. I can print it from one tack, but a lot of the newer software I'm finding I say yours is to that... they hey are and stuff would go into the Quickbooks side and you would run your reports through Quickbooks. Is that how you guys are setup?

QUINTON

4:40 You got it. Yup.

12818388665

4:41 Yeah, that's what I figured. We don't like that at all. But I don't know if that's something that we can get away from. And the reason we don't like it is we don't want everyone to have access to Quickbooks. And everyone needs to have access to these reports.

QUINTON

4:59 Where, where does some of the things that they're that you guys need to see? Or some of the other people in the office need to see other than just HR? And?

12818388665

5:10 There's like sales journals, which... which I bet, I'm pretty sure you could probably run those in your system to like... whip per job status. I appreciate. I can probably do that too, right?

QUINTON

5:25 Like, like tickets that are still open things that needs to be complete. Yep. Okay. So with this one and then what's the other ones?

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5:35 And... ruin, I was the only one and like the panel, you know, profit and loss, but, you know, we can definitely get that from Quickbooks. And so when like say I go in and... and make a payment to a job, does it automatically go over into Quickbooks?

QUINTON

5:59 Medically? So when you guys send out an invoice, whether it's through service trade, or whether you send it out through... through Quickbooks... you know, those invoices are created within service trade, you can send those over just with a click of a button. But once their pay, they're not gonna automatically transfer over. You do have to just click the button to send, sync that invoice over.

12818388665

6:22 Okay. Yeah, that's what I figured. And that's fine.

QUINTON

6:27 By designed to, it's... it's just to eliminate. So if there are any errors on that invoice, or if there is anything that needs adjusting, you don't want to automatically have that sent over. So then your records are accurate. So we make sure that you guys can check over the invoice, make sure it looks all good before you... you pass it over to your Quickbooks account.

--- *Pricing* ---

6:45 For sure, for sure. Okay. So some are pace and I want to give them like say they pay 50 invoices with one check, you can apply that check and just click off 50 invoices to pay? Or do you have to go into each invoice?

QUINTON

7:05 You would have to go into each individual invoice and pay? I'm pretty sure.

12818388665

7:11 Yeah, that's not gonna work. Yeah, definitely gonna work because our customers, I mean, we get huge checks and I'm not gonna go in and post the payment, every single check. Like how Wintac I set up. This is our current system. You go on the like the P, pick the first job and then you hit receipt and all of the invoices that... that customer owes pop up and you just put a check mark that every invoice you wanna pay. And at the bottom, you hit submit and it pays them all with one click of a button.

QUINTON

7:44 Yeah. Yeah. And it's kinda going back to, you know, we're not an accounting platform were specifically designed for service. So things like bulk paying invoices, I mean, you can send multiple services and multiple appointments onto one work order and have that invoice the paid on. But like sending out 50 invoices in that are being able to pay 50 invoices at one time within service trade. That's just not something that we do.

12818388665

8:14 Okay. And like... when we go to submit a payment, now, we have the option to pick the date that they hit that is paid, then lay put the check number, and then may put the amount of the check that here that's how it's deposited into our Quickbooks, that's how it transferred over into our Quickbooks. So once you hit okay, so every single invoice, you would have to go in and put the date that it was paid, the check number and the amount... that's how you all do it.

QUINTON

8:53 So the... the way service trade works is... is your invoices for a job are going to be created within service trade, you can send those invoices out within service trade. And we have a feature to where like you can actually have your customers pay directly on those invoices if you'd like them to... or you can simply just transfer that invoice over into Quickbooks. And then however you guys are... are... are sending out, I know you're... you're doing that through Wintac, whatever. However you guys are sending those invoices out now through Quickbooks. You would continue to do it the same exact way. So all of your like your service related opera operations, your scheduling, dispatching, work order management, keeping track of those working progress jobs, your text reporting, deficiencies, having services through out in the field, all of that's going to be done within service trade. And all of like the payments are the payment processing or keeping track of our things along that nature are all going to be done in... in Quickbooks?

9:53 Okay. So how does service trade? No, that... that invoice has been paid, it just disappears and the Quickbooks?

QUINTON

10:03 You can market paid or... or honestly, there's two ways to like if you... if you use the... the pay now feature within service trade and your customers pay that invoice.

--- Pricing ends ---

12818388665

10:12 Yeah, we don't have that option. All of our, all of our customers, we have to upload invoices into a portal.

QUINTON

10:18 Right, right. Okay. So, yeah, for instance, if then, if you're... if you're creating those invoices within service trade and you want to market paid within service trade, you would have to mark them as paid for each one that you sent out.

12818388665

10:34 Okay. I don't think this is gonna work for her. I can definitely... presented to her but I'm pretty sure. Okay. No, I definitely don't wanna.

QUINTON

10:48 You know, your time or... or hours. So, if... if, you know, maybe you talk with whoever is your accounting person, or your office lady, wherever it may be. If that's a deal breaker, then, you know, hopefully part ways. If not, we can always revisit and... and go through the platform.

12818388665

11:10 Okay. And every invoice and software.

12818388665

11:21 So, if we keep the invoice as not paid but it's invoice, it's always going to show up. Like if you run a web, well, let's show up on there as an invoice not paid or will fall off the web because it's closed as an invoice.

QUINTON

11:38 So, so the way it works is there's... there's difference or you can run a job report and you can say all the jobs show all the jobs that have not been completed yet or have not been invoiced. Yet. There's also a section on the dashboard that showed like jobs that have been completed but needs to be kind of stand as approval to be invoice. And then... then jobs that actually needs to be sent to your customers. But as far as like when those are actually paid on, if you're... if you're not marking them paid within service trade, you can still keep them. You can still keep track of all that

within Quickbooks and just sink those invoices over. But you can mark that paid within service trade to kinda keep both records accurate. Does that make sense? Okay?

12818388665

12:31 And, and let me... let me tell you why this is so important. So, our bank requires they are to show all of the open jobs on one report like an, a, our report by customer by date. So the air's are sorted out back customer, all the state to newest date and it picks on that. Our report and this has to be ran through our Wintac system because they have to know the data was invoice. The data is do the invoice number and them out. And when tag right now, our current software produces these forums for us. So if the bank calls me and I need to give them a quick, are I have it even if Quickbooks is not up to date?

QUINTON

13:29 So, you're sending the bank an invoice that shows you're saying that our, of your customers from oldest to newest and what's... what's the difference of the Wintac invoice than... than the Quickbooks invoice?

12818388665

13:46 Because she may not have integrated it and to Quickbooks yet. Okay... they see... go ahead... go ahead. The girl that does it is the owner's wife and she comes like once a month, if that.

QUINTON

14:03 Right. Okay. Gotcha. So that's why you need to be able to send it right then and there and not wait a month later when she got.

12818388665

14:12 Yeah.

QUINTON

14:13 So... could you... could you have access to Quickbooks and send that over to the Quickbooks account and then send it out through the Quickbooks to your bank?

12818388665

14:24 I probably could, but I don't want access to Quickbooks because honestly, I don't want any part of the accounting or the money going in and outside. They have like the last 10 people that we've had that have... have access to work in Quickbooks. They don't work here anymore because of Quickbooks. Gotcha... gotcha.

QUINTON

14:48 It sounds like Quickbooks is Stacey, he's a baby and she doesn't want anybody messing with it. And if you do it's bad too.

12818388665

14:55 Yeah.

QUINTON

14:57 Yeah. Well, that makes sense. I mean, I wish I could find a solution for that, but this is just like the accounting side of stuff is really not what service straight. And as well as it's if... if you're if you guys are looking for an all in one platform were... were specifically designed for the service side of things, let's see.

12818388665

15:18 We may have to go to.

QUINTON

15:19 Yeah... yeah.

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15:23 Yeah, I mean, because it's almost every company that I've talked to... the software is being separated out and... and it's... it's just exactly like your platform. You know, the... the service trade desk for the actual like dispatching and... and the jobs side and accounting is Quickbooks. I mean, that's every single software company that I've talked to so far. It's been like that. So we may not have a choice and.

QUINTON

15:58 Reason for that too. It's it... it all makes sense, right? I have it all in one solution. But the... the, what you find with an all in one is that, you know, people claim to do it all and then they don't do all of it really well. So, like for instance, with Wintac, you guys are having to still reenter all that information in, but yet it takes care of some of the things that are crucial to your business that you really need, you know, so.

12818388665

16:20 Right. It's...

QUINTON

16:21 It's really that finding that... that it's really finding multiple platforms that all seem can work together rather than one that kind of handles something. So, so and then, but also handles one side, that may be another platform, my man... so that we're... we're known as a best of breed solution.

12818388665

16:40 Right. I got it. So.

QUINTON

16:47 Through the platform today. And then, you know, if you guys feel like this might be a good fit, we can revisit the conversation or I can even send you the recording of

our previous meeting, that, excuse me, that goes throughout the... the entire platform to... if you think that would be sufficient as well?

12818388665

17:13 Well, why don't you send me the recording? Okay? You know, it goes to the platform because I don't wanna keep you tied up when I don't even know if it's gonna work for us. Sure. And then I can show her the... the video... and...

QUINTON

17:35 Yeah, I think that would be the best move because I can... I can certainly send you the recording. You can show it to Stacy, kinda talk about what we talked about today. And then if you guys really get to... to fit, finding that there's really not a platform out there that does what you guys need and you kinda need to go with service management solution kind of like some of the others that you've seen, we hope that we'd be probably the best fit for you guys given your, the work that you guys do. So.

12818388665

18:03 Yeah, actually, everybody has, and so, not everybody but a couple of people that I have spoken to have recommended you guys and trying to find my notes to see who that was.

12818388665

18:26 I see it was field ops... so not, have you heard of BuildOps? I've...

QUINTON

18:35 Heard of BuildOps?

12818388665

18:37 Yeah. Build on. So we've done a demo with two and that they got from field ops recommended y'all and they were more residential and that he recommended y'all first and then build up second, and somebody called smart trade third.

QUINTON

18:56 SmartService.

12818388665

18:59 Smart, no, smart trade. And then SmartService was next, but they said SmartService was not very highly recommended.

QUINTON

19:06 Yeah. I haven't heard of the best things about SmartService or BuildOps for that... for that matter... but... but yeah, I mean, we are specifically designed for commercial service contractors. We'd say we have about 800 customers now, all pretty much for about 70 percent of those being on Quickbooks. So the integration

works great. We solely help our customers grow revenue and become more efficient. So if... if you guys can get around the... the whole invoicing thing and be able to use Quickbooks for your financials and figure out a way to send a report without having to wait for Stacey to do it... that... that would be, you know, obviously.

12818388665

19:52 Right. And what have you heard bad about BuildOps?

QUINTON

19:57 Well, we never want to bash another platform but... some of the implementation, I guess things that they promise their customers. I guess I've never really followed through on an it's been years since that's actually, I guess came to... to light. So that's just some of the things that we've heard.

12818388665

20:19 Gotcha. Yep. Okay. I have on the app as in with them too. So let me see. This is what I think like you said, send the video. So, and it's like it's a demo of your whole software or is it what we already went over? Like what we talked about? Nope, it's a complete full demo. We will also just about everything. So.

--- Wrap-up ---

QUINTON

20:48 Think it would be a good start. And then if you guys.

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20:49 Want to go through a second demo with?

QUINTON

20:51 Stacey and her husband as well. I'm more than happy to set that up too, but I think it's does since we kind of already went through this, we could probably send the video first. And then if we need to do a second demo.

12818388665

21:04 Start from there. Perfect. Cool. Well, do you have any more questions? I don't think so. Alright. Well, sorry, I hope this was an.

QUINTON

21:16 Wasted time.

12818388665

21:18 No, not at all. Okay. Good. I'll go ahead and report on it. They can know that that's a big, that's something Baker, right? For sure. Okay. Cool. Well, okay. Sounds wonderful. If you have questions, please let me know. Yes, sir. Thank you so much. Yeah, thank you. Bye bye bye.

The End