



# **ServiceTrade Demo with K.E.G Plumbing & Mechanical**

Susan Warren with K.E.G Plumbing & Mechanical  
Recorded on 11/8/23 via Zoom, 2 hour s 3 min.

## **Participants**

### **SERVICE TRADE**

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*Territory Manager*

Chris Resta  
*Associate NorthBoundary Account Executive*

### **K.E.G PLUMBING & MECHANICAL**

Samantha Osmer  
*COO*

### **OTHER**

Phone Caller #2

Phone Caller #3

Phone Caller #1

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# Transcript

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

SUSAN

0:00 SAMANTHA, how are you?

SAMANTHA

0:01 Hey, I'm good. How are you?

SUSAN

0:03 Good, good. I'm Susan Warren, I'm a territory manager.

SAMANTHA

0:06 Here.

PHONE CALLER #1

0:06 Here at service trade. Nice to meet you. Nice to meet you. I've got somebody else coming in.

SAMANTHA

0:12 Here. So...

SUSAN

0:15 Zoom did this update where it has like in the smallest font possible like letting you know someone's trying to join your meeting. So, I'm like trying to make sure I never missed anybody trying, to hop in here. It's like, hello, Gary.

SAMANTHA

0:32 May not... you may have to call in Gary... on the number.

SUSAN

0:44 I'll pop the dial in number in the chat.

SAMANTHA

0:47 Okay.

SAMANTHA

0:54 I'm gonna have to fix this computer. I didn't know, I didn't have stuff on it.

SUSAN

1:01 Good. Yeah, while he gets situated, basically, the game plan for today, if it sounds good to you all is to, you know, spend the first chunk of time just learning more about your business, what you're hoping to accomplish with a tool like this, give you a little bit of back story about service trade and then spend the bulk of the time actually showing you around some workflows.

SAMANTHA

1:25 Okay.

SAMANTHA

1:35 All right. She can't get in. So she's gonna sit here with me, okay?

SUSAN

1:40 That was my bad, I think I...

SAMANTHA

1:43 Are you Payton? No, there is no Payton? Ashley.

SAMANTHA

1:53 Okay.

SUSAN

1:56 But yeah, we'd love to kinda start off kinda just.

SAMANTHA

2:00 It's trying to show you there, but it's not.

SUSAN

2:04 Just as connecting to audio.

SAMANTHA

2:07 Yeah, I had to update the Zoom server. So I just came in here. Okay? I shouldn't have done that.

SUSAN

2:22 But we'd love to start off kinda like what everyone's roles are that'll be a big help. So, what's your official title there?

SAMANTHA

2:32 Which one? Is it? My API title? Am, operations, directors, CFO? Co?

SUSAN

2:45 There's a lot of hats.

SAMANTHA

2:49 And go ahead just batch.

PHONE CALLER #1

2:56 Very good.

SAMANTHA

2:59 Gary, is, he has just come in, so he's kind of like we don't I don't know that we have a specific title yet... because we're trying to figure out, we know what the goal title is gonna be, but we, he doesn't have a specific title yet. And then our warehouse manager is also kinda sitting in for it as well and account gets back here too, so she can kinda see things too. You know, just.

PHONE CALLER #1

3:30 I...

SAMANTHA

3:32 You see me or not? Yeah, I'm here probably hopeless. Hello.

PHONE CALLER #1

3:38 And what was your name to else?

SUSAN

3:43 Okay. Else and accounting. Well, thanks for going over that. Nice to meet everyone. Are we still trying to get Gary situated with the ATS?

SAMANTHA

3:57 Gary, are you in? He's got his headphones on so he may not... check on all, the, yeah. So the call to call in because she, I think she sent us the number to call in?

SAMANTHA

4:34 You said you couldn't get in, okay, get to work?

SAMANTHA

4:45 Yeah, like it's still doing... because we need to fix the Zoom because it still has pain do on it, but I mean, we can go ahead and get started.

SUSAN

4:57 Yeah, I kinda wanted to start off by confirming some of the notes from Chris 's call. Just start off like more like demographic information and then kind of jumping in to, you know, the meat of, you know, pain points by here, what you're looking for, but just want to start off by confirming in terms of total folks you'll have out in the field right now, you know, doing service work. Is that eight technicians? Is that correct?

--- Access to information ---

SAMANTHA

5:20 That's eight text, but then of course, there's helpers, and there's like punch out us and things of that nature too. So, but eight leads as far as lead trucks.

SUSAN

5:34 Gotcha. In terms of folks that would like need to use, the mobile app to actually go in, edit work orders, be by themselves on a job, that kind of.

--- Type of work ---

SAMANTHA

5:44 Yes.

SUSAN

5:45 Gotcha. Perfect. And I saw in the notes, we're about 90 percent commercial versus single family resident.

SAMANTHA

5:52 Correct.

SUSAN

5:53 Okay. And then thinking about the, all the work you do by job volume, what percentage would you say is installations, and what percentage would you say as service?

SAMANTHA

6:14 I'd say 70 30 70 service.

SUSAN

6:20 70 service. And then of that service bucket, what percentage would you say is more of that proactive recurring plan, maintenance inspection, that kind of thing versus reactive repairs?

SAMANTHA

6:33 Well, our customers love reactive repairs just to be absolutely honest, they like putting bandages on stuff.



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

SUSAN

6:41 Person to say that to me next week?

SAMANTHA

6:43 Necessary. Well... most of what we do is school systems, so they don't really like to spend money on complete total re, pipes when it's necessary. And our school systems are, you know, like some of the schools are very old and so they're very dated, you know, like there was a fire agent last week that was from 1963.

--- *Recurring maintenance* ---

SAMANTHA

7:12 You... yeah, exactly. So most of it is repairs and not, you know, like more reactive versus proactive. We do a little bit of like preventative maintenance with some of the schools and some of our properties that we maintain as far as jetting either quarterly, semi annually or annually.

--- *Type of work* ---

SAMANTHA

7:45 And then of course, there's also like boiler maintenance where we do those annually or water heater maintenance. That we also, we have certain agreements with properties where we service their water heaters annually. So that in order to hopefully... link on their life span.

SUSAN

8:09 Would you say growing the volume of plan maintenance agreements is something that you would like to accomplish as a business? Is that like a top?

SAMANTHA

8:15 Priority? Yes, yes, it is.

SUSAN

8:23 But just to kind of put a rough ballpark, would you say bad job volume right now that's maybe like 15 ish percent or just make that up? I?

SAMANTHA

8:30 Like preventative maintenance type? Yeah. Anything? Okay. No... I would probably say around five percent if that.

SUSAN

8:44 Gotcha. And so you mentioned schools, any other specific types of customers that you're going after?

SAMANTHA

8:51 We have a contract with an abush... we have contracts with county governments, like government buildings.

SAMANTHA

9:05 Let's see atlantic station, which is more retail... but big retail like, you know, huge retail.

SUSAN

9:18 And in terms of the work that you're doing, obviously, you know, as the name implies, you know, plumbing backflow, you mentioned water heaters, boilers, any other bread and butter services you're providing?

SAMANTHA

9:33 If, if water goes through it, we do it. So it's not a, we do kinda everything. He doesn't really say no to anything, which kinda, I guess sets us apart bread and butter though we're huge underground. A, very, big thing for us. And the fact that we're turnkey so we don't have subs, we start the job and we finish the job. We, the only time we don't is if there's like we put a clause in for like cosmetic work. And the only time we will not be responsible for cosmetics are like 10,000,000 plus homes and things of that nature. Because then that's just above our wheelhouse. I mean, we can do everything from block work to rock work and things of that nature.

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

SAMANTHA

10:28 But we do not, we don't like the liability of, you know, 10,000,000 plus home dollar homes and their cosmetic needs.

SUSAN

10:39 That seems very fair and reasonable. They might have a level of expectation that might be.

SAMANTHA

10:46 Absolutely well.

SUSAN

10:46 Extreme if you will.

SAMANTHA

10:48 Yeah, doing block work at a school versus, you know, cosmetic repairs at a expensive home or two, totally different things completely.

--- *Purchase decision* ---

10:58 Understand that.

SUSAN

10:59 Well, thank you for all that background. I'd like to kinda jump in, you know, read through the notes from the call. It sounds like, you know, you guys went through an extensive evaluation process. You got started with BuildOps, and then just things didn't go well. I'd...

--- *Purchase decision ends* ---

SAMANTHA

11:18 We don't necessarily get started. We had templates created. I had, you know, my PDF templates for them, like to fill in on reports. We, we never went live. We built the system... and within three weeks of our go log date, it was determined that there was an issue with the integration and the records going from BuildOps to Quickbooks on billing inventory. And I'm like, okay, well, they said the, they solve all would have been we could go ahead and go log and I would just have to go into each system. And, and I'm like, no, we're not doing that. Like if I've gotta do that and I'll keep what I have because I don't have to do that currently. And so, the goal with them was okay, we'll give us until, October first. They did not have the glitches fixed or, you know, resolved. And so then I asked for a firm date and they can't give me one. We came to BuildOps after 14 long demos and they were the only ones that could kinda do all of the things I needed.

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

SAMANTHA

12:50 And when I say all of the things... Steve maxi, that includes, you know, inventory, tracking, asset tracking, and transfers, and things of that nature because.

SUSAN

13:07 Transfers, I didn't catch that last one. What do you?

SAMANTHA

13:10 And like inventory or asset like transfers and tracking. So when I say that, like if truck number 12 has a camera on it and is near truck number 14... and truck number 14 camera goes down... I need truck number 12 to be able to transfer that camera, like to truck number 14 if that makes sense.

SUSAN

13:42 So the ability, so like I'm a technician and I'm like grab like my cameras broken. I need the ability to be, like let me look at the inventory of all.

SAMANTHA

13:53 Not necessarily seeing where they're at.

SUSAN

13:57 But just knowing what's available on said truck?

SAMANTHA

14:00 Yes, but like let's say, you know, because worst case scenario and that's the way I see everything. Worst case scenario on the weekend. If somebody needs something and I can pull it up on my phone and say, well truck such and such, how's this? We need to be able to transfer that equipment to that specific truck. I don't care if it's gotta be an inventory item that is considered an intangible item that's not worth value and we're not selling it. We've got to be able to track where that piece of equipment goes from start to finish. Because the worst thing is when... it doesn't you know, somebody's going where's that camera that's like, no, that's not good management. It's not good anything because you've got a 12 or 15,000 dollar device that nobody knows where it's at because it went from this truck to this truck and nobody can track it. But does that make sense?

SUSAN

15:08 I basically, there needs to be some sort of trail of like I went, I didn't have this. So I went and grabbed it from this truck. I can see that happened because that way there isn't some like, well, now, I don't have a camera on this truck and where did it go?

SAMANTHA

15:24 Exactly. Yeah. Because everything here is numbered and assigned to trucks. And so... we need to be able to almost take the human error out, you know, because I don't want to say this, in a negative way but they're young men or old men, whatever, and they don't necessarily communicate very well sometimes or remember or, you know, keep track of things or whatever.

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

SAMANTHA

16:05 And so, the better the dummy proof system we can possibly offer, you know, it will be better for everyone. Like just so we're not, you know, chasing our tail.

PHONE CALLER #1

16:25 That...

SUSAN

16:26 It definitely makes sense. So something I want to clarify that make more.

PHONE CALLER #1

16:28 That's when we get into.

SUSAN

16:29 The system itself is, so let's say I'm a technician and I... will use the truck example.

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

SUSAN

16:41 So I need a widget to complete this job. And I go and take a widget off of another person's, truck. And so I go in, I mark, I took, you know, let's say I took two widgets off of the truck. There were five to begin with. Now, three remain on said truck in your system. Are you needing a way within the field management system to say, yes, we consume two? Or are you also looking for a system that says we consume two? There were five. Now, there are three instantaneously. Once that is removed from inventory?

--- *Invoicing* ---

SAMANTHA

17:18 Yes.

SUSAN

17:19 Okay. And that needs to happen in the moment and can and can't be done through like accounting because we need that information before the invoice is sent. Is that correct?

SAMANTHA

17:31 Not necessarily before the invoice. Like, you know what I mean? Like if the invoices and then removes it, then all is well and good as long as within that process it gets removed, does that make?

--- *Invoicing ends* ---

SUSAN

17:45 That, that makes sense?

SAMANTHA

17:47 Yeah. It doesn't have to be like real time like, you know, because ultimately, they're gonna know if they have, you know, like something whether it's material or whatever they're they should know if they, if they're doing their job, but, you know, again, I'm just trying to get out of human error.

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

SAMANTHA

18:09 A perfect system to me would be, you know, because our trucks are like warehouses, you know, we've got our main warehouse, which kind of sells all of the materials to the other warehouses, you know, kind of in a transfer process, you

know, main warehouse one, if truck six, truck eight, you know, like whatever that main warehouse needs to be able to transfer material from it cell to the truck.

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

SAMANTHA

18:41 It also needs to be able to transfer material from that to a job work order. I don't know how they're labeled in your system.

PHONE CALLER #1

18:50 For jobs?

SAMANTHA

18:52 And not create a po that because to me POS are like, it's almost cumbersome like you're doing. The, the only way we should create POS is if we're doing it to vendors like great.

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

SAMANTHA

19:08 Yeah, at the same time, we need to be creating POS for outside of the company, not within the company. I want like a transfer process from the main warehouse to each individual truck or even to the job or work order. So that then when that technician is in the invoice creating it, they see this transfer came in from the warehouse to this work order. Does that make sense? And so now that material was allocated to that work order in anything else they pulled from their truck, does that make sense?

SUSAN

19:47 That, that makes sense? And it's gonna, I'm gonna jump pretty much immediately into that when we get into the office for you to make sure because it make sure that we can do what needs to get done.

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

SUSAN

19:58 But you brought up something interesting, you said when, the tech is kind of evaluating. So generally our process and you tell me if this is different than, you know, how you would want to do things because we have, you know, additional options. But generally the workflow of most of our customers is the office, you know, sets up the appointment, sets up the work order.

*--- Quote templates ---*

SUSAN

20:18 There on me, multiple appointments, all that good stuff. You know, they put in the description of what's expected, the expected parts, the technician goes out there adds their notes, you know, takes pictures, you know, fills out forms, you know, indicates additional parts that were used and where they got them from that.

--- *Quote templates ends* ---

SUSAN

20:39 And they, you know, they market complete, they clock out, move on... very much hyper simplifying things. Of course. But then when that gets, when that's done, the office then reviews before sending, you know, the invoice or even just a service link to the end customer. Is that as workflow?

--- *Deficiencies* ---

SAMANTHA

21:00 Yes, yes, perfect.

SUSAN

21:03 I wanna ask you as well about quoting when and how are you quoting generally?

SAMANTHA

21:09 Not quote. I'm sorry, the field does not ever quote. Okay, the field can attain photos and either upload them or send them to the office or, I mean, right now, we all have like our little huddle groups.

--- *Quoting* ---

SAMANTHA

21:25 So they all send the photos to a text and say, by way of text and say, hey, you know, we need to give a proposal for blah blah blah. And then there are certain people within the office that do the quoting. But our guys are not salesmen per SE. So we're not a flat rate company. They do not quote, they don't upsell, they don't none of that like...

--- *Paper process* ---

SUSAN

21:54 Info gathers.

SAMANTHA

21:55 Yeah, they're info gatheres and they are plumbers like that. As my husband says, they're paid to plumb, not sell because one, you know, he reviews everything. Everything that comes out of this office is gonna have a name on it that represents him because he says, you know, too often, you know, like people will miss something and they'll try to tell a customer they need something that they didn't really need to

resolve their problem, that look at, the picture in a way to resolve the issue and prevent issues in the future, they looked at, you know, if we just retype this whole thing... that not necessary, you know, like, you know, think of the customer as you would want people thinking of you like, you know, and that, that's his mindset with all of them? Pretty much exactly.

SUSAN

22:58 Now, are most quoting opportunities originating from the text, spotting something in the field? Or are there also a lot of towns where people are calling up describing an issue and the quote is purely generated from the office both. Okay. Quote, both ways can handle.

*--- Paper process ends ---*

SUSAN

23:20 So, we talked about parts management. We talked about the like the general workflow, reducing human error, the ability to, you know, well, actually, I kinda want to get back to like how did things end with BuildOps? So it was just like, hey, this just isn't going to work and let's part ways or are you still like under any sort of agreement with them?

SAMANTHA

23:43 Everything went into a standby mode. And then my husband, I had a ultimatem like given to me. I was supposed we were supposed to have been live this past January. And when they told us that they were not going to be able to get like, they didn't have any sort of resolution time in October, my husband pretty much told them... and excuse the terminology shit about that because I don't have any more time to waste with you. Either you give us a definitive date that you can resolve these issues. And if you don't have a definitive date, then we're going to start looking at other programs. And so that's where we're at with them. I mean, I've given them the opportunity to come in and kinda sell themselves to other people and they've really not taken advantage of the opportunity. Nonetheless, they're kinda like their install mode, I guess and have responded a lot to my emails. So that's kinda where we're at. Yeah, I believe it's time to move on. He asked for a full refund because he's like this is bullshit. You know, this is, I'm very transparent. Yeah, you, we told you our needs before we ever signed any sort of agreement. And we actually had because our demo with them was like almost three hours long. So they knew going into this before we ever signed anything, what our expectation was and what we needed like it was, can this do this? Yes. Let me show, you know, like how this can do this. So, our should have been an hour long demo went into a three hour long demo and it was very, you know, hey, we can do, this and this but, and it was all great until we got to the inventory part and so, which they did not have inventory. When we did our demo inventory was new for them, but they gave us a guarantee in our paperwork that before we went live that inventory would be active and seamless, and wherever we've never gotten there yet. And that was like...

PHONE CALLER #1

26:17 They didn't have a way for you to like.

SUSAN



26:19 Like, so you're saying like they didn't have a day away for you to like go and pull a report of like show me everything that was used, you know, parts wise this week and where it came from.

SAMANTHA

26:30 No, we were going to have to manually input that information in like in both programs.

*--- Accounting integrations ---*

SAMANTHA

26:36 Both computers are not both Quickbooks and in BuildOps because there was no communication between the two. Like something got used. We were gonna have to manually put that information into both systems. And there was no work around that. I mean, I don't know if you all do anything with out of the box, they do a lot with like Quickbooks implementations and building the program and all that stuff.

*--- Accounting integrations ends ---*

SAMANTHA

27:08 They were actually on the Zoom call with us and they were like, no, no, no, wait a minute, but to open up a can of worms. And if there's no communication between the two programs, one that makes us feel extremely uncomfortable because what's the likelihood if there's no communication or with inventory, that payroll and all these other things are going to be accurate as well. And so they were, they put on the breaks immediately and said, we're not causing a company more work. This is supposed to make, you know, less work for the office, not more work. And what you're saying is gonna cost everybody a lot more work especially when you, it comes to inventory. So, you know, ultimately, you know, I know your more of a commercial base, not as much residential as well, then like literally, you called me like literally, I think like the week everything took place with BuildOps and, you know, our goal is, you know, just to make things easier and not have like this.

PHONE CALLER #1

28:26 This?

SAMANTHA

28:27 Is our world?

PHONE CALLER #1

28:31 I was gonna say I had a grab a big stack in physical.

SAMANTHA

28:33 To check so I can Bill like right now, this is like for me to check and Bill, and it shouldn't be that.

PHONE CALLER #1

28:41 That way. So... yeah. Well, I'm...

SUSAN

28:49 We went through that.

SAMANTHA

28:51 So necessary. It's okay.

SUSAN

28:54 So, I mean I talked to people like all day every day at work and this is what I have experienced because you're not the first person in that situation that I've talked to and it's usually. So I will say how we do things in light of what you've experienced. So like if there's ever something that's like I need, this is really important to me and I don't like explicitly like show you or explicitly explain how that's done like please stop me because like we have, I mean we have a lot of cool stuff like coming down in the pipe, you know, like some really cool features that are, you know, on the road map, but I would never want you to buy anything that I cannot show you the tool. And so not the first time I've heard issues around the Quickbooks integration... because I mean it's just one of those things like my guess is that what happened with BuildOps is that they got a huge infusion of like VC capital and we're basically just told, grow like, acquire, and we'll figure out the rest later. And that's not what we feel like was the right way to go. Like, you know, we've been growing more organically over time because for us like customer retention is kind of our more of our business model. You know, we want to make sure that if we, because we know, like we all know, like I've experienced that, you know, when I was a sales manager at a pest control company, we switched software three times in one year. And one of the reasons I was ready to leave when I did. Because like this is awful, I'm doing a bunch of extra work and I hate it. So we want to find folks that are going to be happy, you know, with a long term relationship and grow with us. So I'm sorry that you went through all of that. And basically my goal today is to like make sure that everything you know, because there's no such thing as a perfect system, exactly what you have in your head. It, it won't work exactly like that. But just want to be super transparent with you. And, you know, this is how we solve this problem. This is what it can do. This is what it cannot do. But so we talked about that. What are some other gotta have for you with a tool like this? So what are some other things that you saw with, you know, cause it sounds like you checked out a lot of options that you really liked.

--- Assets ---

SAMANTHA

31:27 Inventories are huge. I don't know if you have like a bar code scanning system that you can, you know, like that would be nice. It's not about have, but it would be nice because that would, we do click transfer process like we're done, that would be.

SUSAN

31:46 We, we have OCR, which is because most of our places, you know, don't have full bar codes for everything. So you can just scan off a numeric text and pop that in for like searching on assets, things like that.

SAMANTHA

31:59 You know, it would be got hubs. Are we want to short description or information, you know, like underground leak, grassy area, underground leak as a concrete well, if we, if they key that information and we would like, you know, it would be awesome if at that point when we put in a description like the equipment use comes up and you have like excavator, skid steer, you know, like... and as far as like it, they go to material, it's like PVC copper, you know?

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

SAMANTHA

32:45 And then like they can just, click and put in their quantities because like I said, I'm just trying to dummy proof some things like, I don't think that, you know, so we can have like safety materials or, you know, yeah, barrels comes like and then they can put a quantity versus because I mean, let me, I like this is trying to remember everything that this is what we deal with right now.

--- *Assets* ---

PHONE CALLER #1

33:19 Yeah, you know, like...

SAMANTHA

33:21 Them trying to remember something like if they can just click everything they use and it be there.

SUSAN

33:31 So being able to pull a list of parts searchable easily from the mobile app?

SAMANTHA

33:36 Most of it's assets that, you know, like as well. Okay, is like, you know, because we charge for the usage of our tractors, our cameras, our gutters and things of that nature. I mean, of course, the same would be with parts. I mean, an inventory as well, but our assets are considered like rental equipment. So we charge basically that customer rented that piece of equipment for that job, if that makes sense. Okay? And it would be nice if there were an, if we were capable of uploading forms for back flows, you know, like where I can pre load the signature, I can pre load things like their calibration dates and their serial numbers for their machine.

--- *Forms* ---

SAMANTHA

34:35 And then they go in and they put the size of the device, what type, you know, what I mean into, and if I can pre load those forms so that then when they send it over, I can just, you know, update it if I need to and send it to the correct jurisdiction. Same with like boiler, you know, inspection form.

--- Forms ends ---

SUSAN

34:57 Pull over the asset information and then just have them keep relevant value.

SAMANTHA

35:03 Absolutely. I mean that would be great. Anything I can think of like would be nice or go. No, I mean for me, the biggest thing is like I take their invoices and I put them in the system for billing.

--- Invoicing ---

PHONE CALLER #1

35:20 So...

SAMANTHA

35:21 Not being a plumber, it, you know, really is intricate, that they put all the information on the invoice. So that's why being able to click on this and everything that you would need kinda with it can be attached to it.

SUSAN

35:36 That, that definitely makes sense. Yeah, I mean, and that's a good thing if you're using anything but Quickbooks would be a much more complex conversation but pretty much everything that, if the information is contained within the invoice, it's going over to Quickbooks.

--- Invoicing ends ---

SUSAN

35:57 So the parts, you know, the hours, the description, the customer info, it's going to Quickbooks. We definitely got you covered there. So in terms of timing decision making process, are there other places that you want to check out before you make a decision that's that are on your list?

--- Purchase decision ---

SAMANTHA

36:19 No, you're the last one... the last one, you know, we looked at ServiceFusion, of course, service site and they're like the horse or, you know, like whatever they think... and that's pretty much it because I've like started looking at... I went back and of course, I found you and I'm like I wanna see these guys before we make a decision.

--- Purchase decision ends ---

SAMANTHA

36:52 And, you know, my husband said the other day, you know, are we going love?  
And I'm like just let me find.

PHONE CALLER #1

37:01 First as.

SAMANTHA

37:02 Soon as I find the program, then we'll be good to go but.

PHONE CALLER #1

37:05 Yeah, no, can zooming back.

SUSAN

37:11 Kind of like really big picture. You know, with this experience that you've had what do you feel like the bottom line impacts have been to the business? Like in terms of, how is this like affected, you know, productivity, you know, profitability, that kind of thing?

--- *Paper process* ---

SAMANTHA

37:27 It affects all of it. You know, because she gets delayed, I get delayed, every person in this company gets delayed because of where we're at with the pen and paper and things of that nature. And, you know, I've spent my time building templates and... you know, we had an issue, with BuildOps where we had like one of our school systems.

--- *Accounting* ---

SAMANTHA

37:59 We had the county like the county school board, or, you know, board of education, and then we had all of the sites underneath it. Like all of the, you know, you got the parent account, you got a little kid accounts over here.

PHONE CALLER #1

38:12 I see you.

SAMANTHA

38:15 And so, but then it turned around during our upload and they're like, no, wait, it's not pulling correctly.

--- *Accounting ends* ---

SAMANTHA

38:25 So now we need to go in and make sites for or make parent accounts for each site. And I was like, are you kidding like this is, and then we did that like my staff did that. And then they turned around and said no, wait, we need to go back and redo that back the other way.

--- Quote templates ---

SAMANTHA

38:45 And I was like, do you understand how many hours we have changing because school systems in the metro Atlanta area are not small. There's 138 schools in deacon me... to go in and have to change because the template, on the site and the template for the customer were different.

--- Accounting ---

SAMANTHA

39:12 So it's not as though we could just copy them and just did a couple of changes. No, it was not that, I mean, like we had to go in and create the actual customer ID for that school because the site ID would not work because of the character requirements.

--- Accounting ends ---

SAMANTHA

39:33 Like it was just like there's just so much. And I'm just at a point where I'm just gonna make things easier for everybody. Like right now, it's just like I just need easier.

SUSAN

39:44 And do you feel like in terms of all the extra time that was sucked up with that stuff? Like has that impacted your ability to like get things out to your customers? Like invoices or quotes?

SAMANTHA

39:55 Absolutely. I, I'm still in voice for October, yeah.

SUSAN

40:00 Which, which gets scary because, you know, the longer you wait to invoice, the more concerns there are about.

SAMANTHA

40:06 We're supposed to, is out in 72 hours gorge national.

PHONE CALLER #1

40:11 That's that's huge... well.

SUSAN

40:17 Thank you for sharing all of that with me. What I'd like to do is like let's go ahead. I wanna give you a little bit of back story about us and then actually jump into the tool itself. So let me go ahead and share my screen... share.

SAMANTHA

40:33 So, let me get with the accounting department. I tried to set all of that up with them and their system sucks.

--- Invoicing ---

SAMANTHA

40:39 And I need to be paid for the back flows that we replaced at that location. Try to go like, I'm livid with that at this point. Sorry, a customer, but like she has owe us money since a, their system to upload our invoices or.

SUSAN

41:01 We'll definitely be covering customer communication and the ways that we can check on that.

SAMANTHA

41:06 I am not the best at some of that sometimes like I have sent emails and I've called these folks and at some point I'm like, okay, I'm done.

SUSAN

41:15 Yeah... I have typically avoided collection, you know, related things to my job. So.

SAMANTHA

41:26 I had this one individual. He was like, you can just call me back and I'm like, I'm not getting off the phone with you until you pay me.

--- Invoicing ends ---

SAMANTHA

41:34 I'm sorry back on me. This is, this is going to escalate fairly quickly like you owe us a lot of money and you're gonna pay me now?

SUSAN

41:46 Yeah, it's like we tried the nice way, but now I'm gonna need to be.

SAMANTHA

41:51 Come on. I mean, nice was like 20 emails ago. At this point. Nice went out the window.

SUSAN

41:58 Exactly.

SAMANTHA

42:01 But, yeah.

SUSAN

42:01 So a little bit about us. So we've been around for just over 11 years. We've got just over 1,300 active accounts in North America. We help manage about 13,000,000 pieces of equipment. We've helped invoice for just over seven point 5,000,000,000 dollars in revenue.

--- *Type of work* ---

SUSAN

42:19 My favorite fund fact is we are in roughly just over 10 percent of all us commercial industrial buildings. Our customers are serving some sort of piece of equipment and those in some former fashion. The point of all of that is to say, you know, we are specifically designed and always have been for folks that are focused on commercial industrial service. If you came to us wanting residential, want to be mostly residential, I'd send you another direction, same thing with mostly install. And frankly the, you know, the reason we've I was asking around that is a lot of folks, you know, one of the things that really stands out with us is the ability to where you can get more planned work as opposed to being, you know, wholly reactive. So of course we can handle the reactive work but we want to have systems built into play to a, that can help you grow the volume of plan maintenance and get more pull-through revenue from existing jobs. So we'll be walking through that and that kind of teas this up right here.

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

SUSAN

43:23 So, you know, there are a lot of great tools out there. You've seen 14 of them but, you know... in addition to, you know, being able to handle the inventory piece, most places, you know, they have like digital work orders, you know, scheduling all of that. This is, these are the areas that really help us stand out in terms of what's different about service trade.

--- *Assets* ---

SUSAN

43:46 So one we already touched on is the ability to, you know, get more and execute better on planned maintenance, on those types of jobs. I'll be walking you through that. The other piece that you touched on is the equipment management piece. And then the repair opportunity tracking. Like I was thinking when you were talking about those school systems that, you know, like just love to put a band aid on things. A lot of places you can go and look at previous work orders of equipment. And that's great. But with service trade, you can actually just show on a particular piece of



equipment. These are all the repairs that we have suggested. These are all the band aids we have put on.

*--- Assets ends ---*

SUSAN

44:23 This problem here is data and evidence of what's going on. And this is why we are recommending this repair or this bigger thing than just band aids. And this is how it could save you money in the long run. Do you feel like that would be helpful to? Have in your arsenal.

*--- Customer engagement ---*

SAMANTHA

44:38 Absolutely.

SUSAN

44:40 So we walk showing you that piece and then we talked about the pull-through revenue. The piece that we talked about, you know, the text, being able to be eyes and ears and of course, you know, plumbing, but letting them focus on that, gathering good intel, getting that back to the office to be reviewed and then quoted out really quickly with a lot of media data behind that.

*--- Deficiencies ---*

SUSAN

45:00 That's we call that our deficiency loop. So in every here deficiency think quoting opportunity, I'm really excited to show you that piece and how we can, you know, take those opportunities from the field and turn them into quotes. And then same deal. We can also, you know, anybody calling up with an issue, we can convert those quotes as well.

*--- Customer engagement ---*

SUSAN

45:18 And then the other piece is the customer communication. So not just timely, we want, of course, make it really easy to get invoices out the door really quickly. You know, same thing with quotes and being of pictures, video, etcetera, but also, you know, not just communicating when it's just an invoice or a quote. So, I sent you an e-mail that's just a service link that can be sent at any time before during after the appointment where you can see what's been done. So really having that Amazon like experience so that, you know, if one of your customers changes hands, for example, and, you know, they're like, hey, why should we, you know, still be using you guys as opposed to just a recommendation?

*--- Customer engagement ends ---*

SUSAN

46:01 You have this track record of let me show you all the things that we have done in the past and this is why you should continue using us. Would you say these four things are in addition to, of course, you know, the inventory piece, would you agree that these are all kinds of top priorities for you guys?

SAMANTHA

46:18 Yes, absolutely.

SUSAN

46:20 Good. Well, sounds like we're in the right place. So let's go ahead and jump into the tool itself. So I'm gonna say full disclosure. We are not as pretty as BuildOps. It's not, this is a workhorse not a show horse. We have been focused on features as opposed to, you know, flashy slick UI.

*--- Recurring maintenance ---*

SUSAN

46:44 But, the way that this is designed, this is designed to it's almost like always on the call like Russian nesting doll view will. So you perform services on an asset, that asset lives at a location, that location is part of a company. And that's you know, the way information always stays organized. So when you go in here into a location page, you're going to be able, this is going to be your central hub where everything is going to live about that particular location. So you've got all of the ongoing services are listed out right here. So we can keep track of that.

*--- Assets ---*

SUSAN

47:24 We can see all the previous jobs that have ever been done and be able to click into that. And of course, you know, filter and search, but this is really nice. This is where all of the assets for that particular location live. They're all right here. And of course, you know, the office can go in and add that.

*--- Access to information ---*

SUSAN

47:40 And this is accessible for the tech as well. And we get into the mobile app. I'll show you exactly. Of course is, you know, can be seen in the office too, but I'll show you exactly how we can see that repair history as well as the general history for each of these.

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

SUSAN

47:56 And then you can see all these other components here, you know, quotes, quoting opportunities, pricing contracts, all that is kind of here in a central hub. So

that's how we have our information organized. Going back to this work order. This is what we're going to be walking through today, this job.

*--- Recurring maintenance ---*

SUSAN

48:17 So this is a planned maintenance visit. However this can be for an install. It can be for repair, doesn't matter. But in this case, this is something that's set up to recur automatically every three months with the flexibility to schedule at any point throughout the month, I know you'd mentioned, you know, with saving a little bit of time.

*--- Recurring maintenance ends ---*

SUSAN

48:38 So this description of what is expected to be done during this service as well as these parts. In this case, you know, just planned maintenance. I'm sorry.

SUSAN

48:58 I think we might have there. We lose folks... yes.

SUSAN

49:09 And we're back.

SUSAN

49:18 Thank you for doing that. I was just talking away.

PHONE CALLER #1

49:27 Hello. Well back. Yeah, you're fine. Gary will just trying to stop me because I was just, I was just running my back. I'm like wait a minute. No, you're fine.

SUSAN

49:40 But yeah. So back here on the work order, so this description of what's expected to be done as well as these parts, in this case, it's planned maintenance.

*--- Quote templates ---*

SUSAN

49:49 So we're just doing labor, but... whatever job items you want on there. So, you know, equipment parts, labor, all of that can be part of a template that you can just then go in and apply across your customer base to help save a little bit of time.

SAMANTHA

50:05 Okay.

--- Tech On-site ---

SUSAN

50:08 So, we've got that in here and then really pretty much everything else we're going to be walking through as we work the job, you know, the clock events are gonna come back in. And then we've got this asset here. If we wanted to, we could click in, see that history, see additional information... and then any sort of like relevant comments, any sort of attachments are right here, but overall thoughts on the office view of the work order?

--- Assets ---

SAMANTHA

50:37 Can I see that parts labor portion like right there at the job? Like no, go up like right there beside general information?

SUSAN

50:49 Yeah, it's the same info.

SAMANTHA

50:51 Okay. Because we didn't get most of it. All we got was like history and then it kinda went out. Sorry, I think you were scrolled up... like with the customer it was.

SUSAN

51:09 Back on the location page.

PHONE CALLER #1

51:10 Yeah.

SAMANTHA

51:11 That's all we were right here when it went out.

SUSAN

51:14 Gotcha. But yeah. So all the ongoing services live on this customer page is the location page... and then all of the assets are all right here. So you can easily add assets, view them. The previous work history, every single job that's been done at this location lives there, and any sort of relevant comments and attachments to that location like a gate code or something like that. But another piece that's really nice is the ability to go in and have... all these different roles across the organization, whether it's location specific or company specific. They're all going to be right here. So you can pull whenever.

SAMANTHA

51:55 Okay. Is there a limit to how many sites you can have for one customer?

PHONE CALLER #1

52:02 No man.

SAMANTHA

52:04 Okay. What about price books?

SUSAN

52:08 So we, our customers do such a broad way range of services. We don't pull in third party price books, but the way our...

SAMANTHA

52:16 Sometime like special pricing for each customer.

SUSAN

52:20 Yeah, that's...

SAMANTHA

52:21 The price book type.

SUSAN

52:24 Yeah. So in that case, that's a good segway.

SAMANTHA

52:29 People have like only, you can only have so many price books within your program. And of course, we have contracts. We have different pricing for each school system we have.

SUSAN

52:43 Yeah. We've got you covered there. No limits on that would help if I clicked on contracts, not contacts there we go. So I have my little pricing contract here and I apply that to all of my crispy cream customers. So this serves a twofold purpose. One is going to give you all these rules about how things get marked up. So this always gets a specific percentage. This always gets a specific price. And then, you know, you've got all this kind of stuff like certain terms, markup tiers, invoice, notes, etcetera, TS and CS. You can have parent child contracts. So all of that's there. But also it's going to give you the ability. So like let's say this was, you know, xyz schools pricing contract. So you could see anything that has that applied that's the default for that particular location. You're gonna see a, if it's like a plan maintenance agreement, when does that expire? And B, you're also gonna see your invoice today and then actual margin so far? Is that kind of what you're looking for?

SAMANTHA

53:55 Yeah, yeah, I.

SUSAN

53:58 Perfect. Any other questions about the location page or the office view of the work order?

SAMANTHA

54:07 No, not on the work order. So what I go in, how do I schedule? Like let's say crispy cream just called in. They have an emergency. I need to get them on the books.

--- *Recurring maintenance* ---

SUSAN

54:20 So we have a couple of options for scheduling when it comes to... the reactive work like that. So if you're just on the page and you just wanna go in here and add a job, you can easily go in here and do that. You know, you can add in the services, these are all the ongoing services.

--- *Dispatch* ---

SUSAN

54:42 You can create a new service. If this, if, you know, I wanna type all of that in and then, you know, add any parts from this page. So that's one way of doing that. But I would say most folks when it comes to more reactive repairs, they're going to head over to our dispatch board because it's usually about, you know, who's available well when. So this is our dispatching board. And we also have a map based scheduler that's more for things that are a little bit further out. So you can see on a day by day, week by week, view all up here. And so you can choose to display which, you know, you can hide technicians or display all of them all right here. And then we can go over and create filters for what types of jobs we want to pull in. So if there's something that's already out there that you've already, you know, built out that way that was just showing, but you haven't assigned a time to this would pull that up. So you can see these are all the jobs that are out standing that are due this week. So we can pull those over and put them into a queue. You can, you know, change it by all these different categories. So like only show me urgent or emergency or priority et cetera.

--- *Dispatch ends* ---

SUSAN

55:57 So that's how you would filter out things that are already in the system. But if you want to just go in here and create a brand new job, you can just go in here. Quickly fill this out. It's going to do, you know, a smart search for you.

--- *Recurring maintenance* ---

SUSAN

56:09 So I'll do my night Dale crispy cream. It's gonna, you know, pull in my contact information. So if I want to, I can go ahead and schedule it out or I can just put in a specific due date and then use that queue to pull it down.

SAMANTHA

56:28 So hypothetically...

--- *Recurring maintenance ends* ---

PHONE CALLER #1

56:29 Speaking, I.

SUSAN

56:30 And my technician to this job today?

SAMANTHA

56:32 And they don't finish... is it like a pause kind of scenario? Like they post a job and they?

SUSAN

56:44 So, if they, so over here, this is what it looks like. When you log in for the day with service trade, this is getting a facelift.

--- *Dispatch* ---

SUSAN

56:53 There. We go go to this page. Internet. This is gonna be getting of a facelift in the coming months. But the bucket that we, a lot of folks in the office really live in is this past jobs to be marked complete? So, the job occurred in the past, the tech has done none, all some of the work and I'll show you what that looks like when we get into the mobile app.

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

SUSAN

57:19 But basically, it's you know, most of the offices, I would say most of their day, but a portion of their day is spent basically going through and evaluating all of these saying, yes, they had everything they needed and they went out and completed the job? Fantastic. We can invoice it or it's hey, they didn't have something they needed or a part, you know, an emergency came up whatever they couldn't complete it.

--- *Invoicing* ---

SUSAN

57:45 Let me reschedule it and we're in the mobile app. I'll show you if they're not able to complete everything, they can list a reason why.

PHONE CALLER #1

57:52 You would match. But technically, you would batch out every job.

SAMANTHA

57:55 From that scenario right there, once you're complete, you would batch. And when you batch it, it's going straight to your accounting software.

--- Tech On-site ---

SUSAN

58:04 You choose to do that. So you can mark a job complete without invoicing it because some folks have someone who qa is the work order and a different person that invoices. So, if you want someone to just market complete and leave it alone, that would then go into this bucket, completed jobs to be invoiced.

SAMANTHA

58:21 Okay. All right.

PHONE CALLER #1

58:25 Yeah. Can I asian technician?

SUSAN

58:28 Can I be let's okay?

SAMANTHA

58:31 I didn't complete said job today and we've called him off that job and gone on.

PHONE CALLER #1

58:37 An emergency job?

SUSAN

58:38 Can be all at one time, he can't be clocked into the same time, but that can, of course, you know, remain on that's. Gonna remain on his mobile app. So, if he wants to go back to it, he certainly could.

--- Dispatch ---

SAMANTHA

58:58 Okay. Do you have like color... you know, like designated colors for urgencies and different things, the calendar?



SUSAN

59:13 Yes.

SAMANTHA

59:14 Okay.

SUSAN

59:17 So, for example, this little, when you're in that queue, that little purple bar that indicates a certain type of service. So that one is a preventative maintenance and therefore is purple.

--- Dispatch ends ---

SAMANTHA

59:29 Okay. Yeah. The biggest thing I think would as long as our tech can be like attached to multiple jobs at a time. So I have experience with service tighten and that was one thing that they did not allow is that if my tech like we had to close them out, pause it.

--- Tech On-site ---

SAMANTHA

59:48 And then if you pause, you couldn't go into another job. So, and with us doing emergency work, a lot of times, we might be on a site and get, I might hold them to somewhere else and that they would have to return to the first job.

SUSAN

1:00:02 Exactly. Yeah. So you can clock out without marking something complete.

--- Tech On-site ends ---

PHONE CALLER #1

1:00:08 So...

SUSAN

1:00:09 You're you're keeping the time and you can go back because we understand that same exact thing happens and that's interesting tight and won't let you do that. Any other questions about, you know, the reactive scheduling, the work order or the location page before we see what this looks like from the text perspective?

--- Access to information ---

PHONE CALLER #1

1:00:29 Go ahead. Perfect. Okay?

SUSAN

1:00:32 Stop sharing here.

PHONE CALLER #1

1:00:41 And hop into my phone.

SAMANTHA

1:00:51 Do they clock in your own on a at? Like they do? Okay?

SUSAN

1:00:56 Do most of your, I mean, most of your guys, you're thinking they're gonna be using phones or tablets or a mix of both?

SAMANTHA

1:01:03 Hi, Beth.

SUSAN

1:01:07 Anything that runs android or iOS?

PHONE CALLER #1

1:01:09 It's fine. Okay. Share my screen, start the broadcast.

--- Dispatch ---

PHONE CALLER #1

1:01:21 Okay. All right. So.

SUSAN

1:01:27 This is what it looks like to log into service trade for the day. Yeah, it would have all their appointments that are assigned to them for that particular day. On this screen, you can go further out than that. You can see anything that's assigned, but unscheduled as well as completed.

--- Tech On-site ---

SUSAN

1:01:47 So we'll go ahead and tap on this job to go ahead and get started. The first thing we'd probably do is we can go down here and swipe across and clock in as being in route. Do you guys track draft time? Yes. So that's gonna take a time and a GPS stamp. And when I tap this, I can notify the customer, you know, let's say I'm actually going to be getting here at this time. And even if you're arriving exactly when you say you're going to, it's still nice because this is going to send a headshot and a name. It's just a little extra layer of customer communication, letting folks know that folks are on their way.

SAMANTHA

1:02:30 Can I do that as well or only the this?

SUSAN

1:02:34 Only the tech can send in route notifications but you can send bulk appointment reminders in. So we'll pretend like this is a very short commute and we'll go ahead and clock out of being in route and clock in as being on site.

--- Assets ---

SUSAN

1:02:53 Again. Another time and GPS stamp have been taken. And so probably the first thing we'd wanna do is check for any comments in here. You know, let's say there's a gate code or something we need to know before we even get started on the job. And this is the same place we're gonna go in and add any sort of job specific comments as the tech later on... in the next place we're gonna go is we're going to head over here and review the services?

--- Assets ends ---

SUSAN

1:03:16 Is that same information you just saw in the office view that's what they're pected to do from the offices perspective. And then of course, we can head over to the assets.

--- Assets ---

SUSAN

1:03:28 This is the asset that is assigned to this appointment. If there are multiples on here, they would all be listed out here. But what's really cool as promised is I can go in here and see that full service history. So I can see all the jobs that have ever been assigned.

--- Assets ends ---

SUSAN

1:03:45 And then I can click into that and, you know, see it the same way. Wow, we're very descriptive with the same big install and, you know, dig into all of that as much as possible. But what's...

SAMANTHA

1:04:03 We were just talking about liking that because like, you know, sometimes not we try for the same person to go if we've got a return to something. But if not, then at least the initial person can capture the information and the second person knows what the, where they left off at, or what happened instead of calling the office and spilling the paperwork. And like all that great. Jazz.

SUSAN

1:04:29 Yeah, not a good use of anybody's time doing that.

--- *Deficiencies* ---

SUSAN

1:04:33 But in addition to that, this is what I was talking about with this list of deficiencies. So here... there's a, there's been a broken backflow preventer that we keep telling them about. And we keep putting a ban date on it and they keep paying us. But what if we had all of this right in front of us either as the tech or the person in the office doesn't matter, you can have that conversation be like, what are we doing?

--- *Deficiencies ends* ---

SUSAN

1:04:57 You keep, you keep throwing us little bits of money here. We'd both be happier if we just went in and replace the backflow prevent.

SAMANTHA

1:05:04 Right.

SUSAN

1:05:06 So, do you think the text would be able to like, you know, potentially have those conversations or even the office? Would that be helpful?

SAMANTHA

1:05:13 They would, they would definitely because we're at AC hotel. We just left AC hotel and we've been there like several times for the same issue and... they're like, but... they were like, no, like we've been here over how.

SUSAN

1:05:33 We've...

SAMANTHA

1:05:33 Told you that we have to shut down this building and, they need us to say, have not allowed us to do that yet.

PHONE CALLER #1

1:05:43 Yeah. It's fun.

SUSAN

1:05:45 Because we were all in the office yesterday and so, in case they keep trying to replace, fix this one event, they keep sending different technicians out and like, they don't have, the history of like what's been the issue? And they're like we've brought

the wrong filters and I'm like the irony of this happening like within the service trade office is like not losing anyone pitching this company, like we tried.

*--- Assets ---*

SUSAN

1:06:09 Yeah, but yeah, but it's not just that it's also like manuals diagrams. Anything that's going to be helpful, a comment, you know, that's like, hey, like the back panel of this is hard to open, go in through the front, whatever. And then of course, like all this basic information is right here as well. And then if there's a whole heap of assets, you know, you can go in here and see when I tap on this, that scan text is gonna pop up and that's gonna do the OCR. And then you've got that same information for every single other piece of equipment that's out there. So, if somebody's got a question, you know, about this, I can just go in here, pull that up, see the service history, see the previous deficiencies.

SAMANTHA

1:06:56 And a manager go.

PHONE CALLER #1

1:06:58 In another technicians invoice.

SUSAN

1:07:02 To assist and like billing and stuff like that can... like.

PHONE CALLER #1

1:07:10 Sign in?

SAMANTHA

1:07:11 Job as well?

*--- Assets ends ---*

SUSAN

1:07:14 Are you talking like after the fact, like when it comes back or?

SAMANTHA

1:07:18 Yeah. So, like in previous world, like sometimes like the tech was struggling?

SUSAN

1:07:25 With creating?

PHONE CALLER #1

1:07:26 The invoice or what have you in the...

SUSAN

1:07:28 So...

SAMANTHA

1:07:29 Obvious...

SUSAN

1:07:30 In the office?

SAMANTHA

1:07:32 I would, we would be able to adjust the invoice and help them like add things like if they couldn't figure out how to add the gender to the job or whatever the case may be. But would, is it different for like a come a computer person as, or the...

*--- Access to information ---*

SUSAN

1:07:49 Mobile app, is it?

PHONE CALLER #1

1:07:50 Different that?

SUSAN

1:07:54 So, you're saying like could someone go in and like qa, somebody else's work within the mobile app if they weren't necessarily assigned to it, correct, got it. So... if they are nearby, they can, you know, there is like something for like, you know, close by jobs. But generally my recommendation for that if that's kinda like the function of like you need someone in the field doing, that kind of office ask functionality is to have them use a tablet and then be more in that computer view. So that way they can go in and do that through there... because you can only see things that are assigned to you.

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

SUSAN

1:08:42 If you think that's going to be the case. You could, you could always throw that manager on the job, just sorta as a qa functionality and then they could go in and do that. But that would have to be done by the office.

*--- Assets ---*

PHONE CALLER #1

1:08:54 Make sure. So.

SUSAN

1:08:57 So that we talked about assets now for the job items piece. So... let's say we are out here and we need to add, we need a part. So we're going to go here and click add part labor. Whatever this is that list that you maintain in the back end that is searchable.

--- Quote templates ---

SUSAN

1:09:18 It can be done individually. If you have a couple of small things where you can do it in bulk. So let's say while they're out here, we need just grab this random black pipe. It's gonna pull all of that information automatically. If we had a cost associated with it in the back end, it would be in there. Let me go find my widget.

--- Quote templates ends ---

SUSAN

1:09:45 So you can key in, you know, really whatever here or if it's something that is not in this list that is a brand new or just for whatever reason isn't in the back end list, they can click that plus button. And then, you know, key in all of this information here.

--- Parts management (inventory) ---

SUSAN

1:10:03 And so for this, what, you know, I think we're thinking about it in particular is this item source area. So if they got it from their truck, then they're going to put technician. And so, that way, you know, this came from Susan struck. However, let's say... we wanna call these warehouses. Warehouses can be other people's trucks. It can be an actual warehouse. So you can go in here. And I actually borrowed this from Danny struck. Let's say I did get it from Danny truck in this case... or if they went and got it from a vendor?

SAMANTHA

1:10:39 Perfect. Yeah, that.

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

SUSAN

1:10:41 Can go in here, put in the vendor and then put indicate the status of order not yet ordered and received. All of that is gonna come back over with the individual work order, but also be able to be reported on an aggregate. So you can run weekly reports on jobs waiting for parts jobs with parts pass, due, so on and so forth. So we're not gonna have that same leakage issue that you experience with pen and paper.

--- Parts management (inventory) ---

SAMANTHA

1:11:05 Okay.

SUSAN

1:11:08 So in this case, I'll do something just to kinda show you what this looks like. I'm going to get this from Danny's truck. So I'll go here and select Danny's truck. Fantastic. And then...

SAMANTHA

1:11:28 Yeah.

SUSAN

1:11:31 This is... I'll just grab something kind of random here and that's for this service.

--- Deficiencies ---

SUSAN

1:11:48 We got that in there is that kind of what you're looking for from the technicians perspective, the ability to indicate that? Okay, perfect. So we found that part, but let's say, you know, we want to grab like a before and after picture. So we can just head over to attachments, do that really quickly. You got photo. You got video, etcetera, all those options, no limitations on that. And let's say, while we're out here, we realize, you guess that there's going to be an issue with this backflow preventers. So let's talk about how that actually gets reported. So we've got all over deficiencies listed out here, but we wanna add a new one.

PHONE CALLER #1

1:12:34 So...

SUSAN

1:12:35 As a technician, all I have to do is fill out the questions right here and that is going to be everything I need to do to report back. So let's say it is a broken... backflow preventer.

SUSAN

1:12:54 And of course, you know, the voice of tech is available as well. We found that the sweet spot for getting quotes approved is like four to five different media items. I won't bore you with all of that. Just take a quick picture of my microphone.

SUSAN

1:13:13 And they can add a description here as well. This is gonna ask us how bad this is. It's making it in operable. We wanna keep it nice and organized. So we're gonna assign it to this and then it's a new issue. And if they want to, they can propose a solution. This is not required. So in just that short amount of time, the tech has done everything they need to do is for the office to then quote that out. So an e-mail has



been triggered saying, hey, a deficiency has been found. Do you want to quote it out? Review it? Whatever? Do you think you, do you think your text would be open to that process?

SAMANTHA

1:13:49 Yes, sure.

SUSAN

1:13:54 So, we've reported efficiency if you need to go in here.

--- Forms ---

SUSAN

1:13:59 And I know we mentioned like the backflow paperwork, we have... that same thing I was, you know, describing of, you know, the ability to have certain rules that can pull in like, you know, customer name, asset information like that static information that lives in service trade. And then you basically just create rules saying if it's this type of asset or if it's this location, whatever, then this blank paperwork pops up and the way that they would get to that as they're just gonna head up down here to view more details. And then under... this drop box, download blank paperwork. And then when they open that up, it'll fill in everything, they just key in the value. And then that PDF gets automatically saved back to service trade. So that's always going to live on this work order and it's always, you know, going to come back and be able to be sent to the customer as an attachment?

--- Tech On-site ---

SAMANTHA

1:14:59 Got to go.

SUSAN

1:15:03 Was there a question about that?

SAMANTHA

1:15:05 No, no.

SUSAN

1:15:09 And do you guys need onsite signatures?

SAMANTHA

1:15:13 Yes, yes.

SUSAN

1:15:14 So the way that we would do that is we would just go well, first, let's add a comment. So let's say we wanna have add a job comment here. I'll just put in the

word sample... so that's gonna come back over for the review process. So we can go down here and click create work acknowledgment, scroll down, select a contact from that existing database. Of course, they can add one. If someone there is new... they're going to be reviewing all of these things with them. They can click into any of that as needed and simply click review. They're just gonna toggle for the TS and CS, click confirm and sign it's. Gonna automatically fill in. So save a little bit of time and then I will Butcher your signature... and that's been sent to you and it's coming back over with the work order as well.

SAMANTHA

1:16:11 Good.

SUSAN

1:16:15 Before we begin the clock out process, any other nice to have or gotta have from the text perspective on the mobile app?

SAMANTHA

1:16:22 Can we create a pre work like authorization like, okay. So that... when they pull up the, because I saw?

SUSAN

1:16:37 You know what I mean?

SAMANTHA

1:16:38 Like that the customers authorizing them to do the work, you know what I mean? Like, well, I didn't authorize that, you know, is it possible for us to create that beforehand? Like send it to the customer for them to do before the technician actually gets there? Does that make sense?

SUSAN

1:16:59 Yeah. I mean that's certainly something, you know, that could be done like, you know, before starting the day is to just get these out.

--- Invoicing ---

SAMANTHA

1:17:10 Okay. It wouldn't be like all the time. I mean, there's just like one or two that here and there that are, you know, and then there are at times like customers that are COD that were, you know, they have to give us a credit card... before we even like go out... having that preauthorization like for, from the customer is saying, hey, I authorize them to come out because of this issue.

--- Tech On-site ---

SAMANTHA

1:17:47 And, if the technician has that, then the customer can't say, well, I didn't I never called you guys. I never authorized anything because they would already have that information.

--- Tech On-site ends ---

SAMANTHA

1:17:57 I mean, that's not like a deal breaker or anything. I'm just asking if that's something that we could be, you know, a little proactive on some of these like homeowner type calls like I said here there... that may help to alleviate potential issues for the technicians?

SUSAN

1:18:17 So, you're looking for a way before the tech even goes out to basically have a confirmation that they're authorizing the visit and are willing to pay for it? Yes. Gotcha. So my recommendation because that, this is all like tech app while they're there.

SAMANTHA

1:18:32 Yeah.

SUSAN

1:18:33 My recommendation would be as part of like for certain types of customers, you would create a tag that, you know, COD, whatever you wanna call it. And then when you're sending out your appointment reminders, run a report on, you know, stuff coming up a week out, that is COD.

--- Tech On-site ---

SUSAN

1:18:50 And in that message basically say like, you know, we need confirmation from you or this appointment won't happen, basically call us whatever.

SAMANTHA

1:19:01 Okay, good deal.

SUSAN

1:19:06 But, yeah, are we ready to clock out?

SAMANTHA

1:19:08 Yes.

PHONE CALLER #1

1:19:10 So...

SUSAN

1:19:11 Right O clock out. So we go down here, unsurprisingly click clock out if they were just taking a break or a lunch break or whatever they can do that. But in this case, we're gonna tap here. And this is the spot that I was telling you about how like let's say they weren't actually able to complete these services, but we still want to clock out. So if I tap here, it's going to ask me why weren't you able to do this? And this will come back over for the office to see as well. So that way we're not calling people asking these questions.

SAMANTHA

1:19:46 Right.

SUSAN

1:19:47 But in this case, we'll go ahead and click, yes, we had everything, we did, everything fantastic. We can continue clocking at. Now. This is something we've recently added.

--- *Deficiencies* ---

SUSAN

1:19:55 This is something you set up in the back end? You can choose some of these things, all of these things, none of these things. But right now, it's required that a technician attaches a photo, they leave a comment and they find in recorded efficiency or indicate that there were no deficiencies. Would that be? Would that be helpful to have as a check on?

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

SAMANTHA

1:20:13 So, yeah, so.

SUSAN

1:20:16 We did all of those things. So it's not giving us any warnings if we didn't know, be like, hey, go leave a comment, can't clock out and in this case, we can go ahead and finish clocking out. So we did all of that. So let's head back to the office and get paid for our work and get that quote out as well. Alright? So head back over here and share this screen. So you notice this has changed from...

--- *Deficiencies* ---

SUSAN

1:20:52 Schedule to complete it. And down here, we'll go ahead into this deficiencies... and we'll grab this.

SUSAN

1:21:12 So, this is the deficiency page is going to have all the information that the tech had on there automatically for you guys to review in the office. And we can quickly add this to a quote. So let's say we want this quote due back to us by the thirtieth.

--- *Quote templates* ---

SUSAN

1:21:35 So, we've just basically converted this to a quote... and... you can go in, add that description, you know, key and service information, add parts manually. But let's say, you know, replacing the backflow presenter is something we do fairly often and let's see if I can find my backflow replacement template.

SUSAN

1:22:02 So this is something you would create in the back end that description of the parts labor gonna come over automatically. So we can review all that internally only it's gonna show you your gross margins and that pricing contract I showed earlier that's what's telling what to charge things. But then of course, you can make small edits as needed with this pencil icon and you can even go in and change the way that it gets displayed to the end customer. In this case, it's granted only. But if we want to be as granular as possible, we can do line items with prices.

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

SAMANTHA

1:22:36 Okay. I got another question. Can we do our customers want line item for labor material is one... line item? They just want it all bundled in one. And then the equipment used because of the rental thing is separate line items.

SUSAN

1:23:01 Let's see. So here are options.

SAMANTHA

1:23:05 So I...

SUSAN

1:23:07 Really do them differently by different types. So I think what you would.

SAMANTHA

1:23:16 So we couldn't...

SUSAN

1:23:18 Have like a level of detail for labor that's different from the level of detail for the parts. You'd have to choose either to group everything or you could be super granular if you needed that level of detail. And, you know, certain instances in one part but not the other. You could always go up into the description and... put that

information into the description and then make things less granular in the remaining portions of it.

SAMANTHA

1:23:48 And we can't do.

SUSAN

1:23:49 Different different type. So like for example.

SAMANTHA

1:23:53 Material and then itemize labor... because what we do now is we bundle like we itemize everything. But when it's sent to, the customer sees a material, it says, you know, job materials and then one lump sum, and then each Labor Day or each technician or whatever is itemized. Okay. All right.

*--- Tech time tracking ---*

SUSAN

1:24:25 So when you say each, so like each like different type of labor, like, you know, this is three hours of general labor. This is three hours of.

SAMANTHA

1:24:34 Like a general, like for instance, three hours labor, three hours plumber, does that make sense? Like, and if we went back multiple days, then there would be like multiple days of each person's labor on that.

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

SAMANTHA

1:24:50 But all of the material is bundled under one material cost that the customer sees it is not, it's not like individually spell out. They wouldn't see that they, eternity wouldn't see a 90. They, they would never see a 90, but they would see that there was a helper there for three hours and they would see that there was a plumber there for three hours.

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

SUSAN

1:25:15 Okay. So I've got a way to work around that. So I would say keep this as vague as possible here, right? Because this is going to be what's on your end. Well, this is for the quote, right? But we're thinking about it for like when you're invoicing out that service link. Yeah. So when you're invoicing out that service link is going to show you a full on timeline of who did what, when, and so they'll be able to see that portion. So, like because I'm getting the impression I want to see like how much, you know, like who is doing what, at what time? Like that kind of like check.

--- Quote templates ---

SAMANTHA

1:25:52 Right.

PHONE CALLER #1

1:25:53 And that way?

SUSAN

1:25:54 You can turn, you know, keep everything super vague.

PHONE CALLER #1

1:25:57 Anywhere else, turn off the.

SUSAN

1:25:58 You know, the specific names of the parts you use if you want to.

PHONE CALLER #1

1:26:01 But then they can go into that timeline. Yeah. So.

SUSAN

1:26:09 For this case, like I'll just do... summarize that type. I'll see what this looks like. So I'll show you what that quote looks like.

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

SUSAN

1:26:24 You can require a po for approval if need be, if you've got some folks that need that extra layer of accountability. I'll show you what that looks like.

SUSAN

1:26:39 So, this is a quote and service trade. You see how it's just listed at like this way. And then you've got... the pictures to go on there as well.

--- Quoting ---

SUSAN

1:26:55 Is this kind of similar to what you were sending out before? What was?

SAMANTHA

1:27:03 Yes.

SUSAN

1:27:05 But, yeah. So they got the pictures and then a big green approved button, there's no disapproved quote or reject quote. They either approve it or request changes. But yeah, and then from there, we can easily just run reports on things like outstanding quotes, you know, the quotes that are about to be passed.

--- Dispatch ---

SUSAN

1:27:23 Do we can have that same reporting functionality for invoices as well? You know, show me everything that's coming up due past due, and then you can send bulk reminders from there as well... and then going back into the actual job that we were on. So apologies for this, it looks like Danny's truck was not set up properly.

--- Tech On-site ---

SUSAN

1:27:47 This is what I get for trying Danny truck on a whim without actually checking it. But this would say Danny truck... on here and that's how that's come back. And then you would be able to like run reports on that. We've got our clock events. So we can go in here, you know, review that against the labor that we're being that we're expecting to use, you know, in this case, it's saying, hey, this person clocked in the we're actually several Miles away. We saw that deficiency that is there. And then that picture and then the work authorization is here under attachments. And then... we can go in here and actually edit this comment and make it so they can see it on the invoice. So from here, we've reviewed this invoice and we're ready to market complete. So we'll go ahead and complete the job. If we want to just complete it, have someone else invoice that we would just complete it. But in this case, we wanna do both. So here we can go in here, complete job and create invoice. And in this case, that cost, we can go ahead.

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

SUSAN

1:29:07 We call it that. So we'll key that in and put that in as 100. We can create the invoice from here.

SUSAN

1:29:19 So this is your invoice prep screen... very similar to the quote screen. And then from here, we can go ahead and get this out. We'll choose to, you know, have that sample comment on there. And I'll show you what that looks like. And before I do that one to change the way this gets displayed, let's do that same summary, some by line item type... now.

SUSAN

1:29:54 So, labor material listed out. The comments are there, then we go into the service details. This is that service link that's in advance that can be sent at any time.



--- Deficiencies ---

SUSAN

1:30:05 I would have the ability to turn this off. So, if I didn't want to list out what was actually used, I could turn this off here. We've got those comments in there. The attachments are right here. We can see the went, the extra mile, found that efficiency. And then here's that timeline piece that we can see... where people actually were doing, what, where?

--- ST app contracts and pricing ---

SAMANTHA

1:30:29 And the customer can see that.

SUSAN

1:30:31 Yes.

SAMANTHA

1:30:32 Okay. But yeah.

SUSAN

1:30:36 The thoughts on the invoicing process and what the customers would think of the invoice. What was that?

SAMANTHA

1:30:41 I would say you want the material, turn it off, won't you... well... like we can only if we bundle, like if, we can't have material like grouped and then not labor. So we have to just do a labor total and material to which is fine. Hold on. Maybe, hey, never mind. Sorry.

PHONE CALLER #1

1:31:09 Hello? Hey.

SAMANTHA

1:31:11 Hey, she's not very social, go in there. Thank you. Okay. But you said and so that we could turn off, but she said you could turn off the material like the detailed list because like some, okay. So if you go to that detailed list again, go to the service details.

--- Tech On-site ---

PHONE CALLER #1

1:31:36 Right here.

SAMANTHA

1:31:37 Yes... you can.

SUSAN

1:31:40 Toggle this off.

SAMANTHA

1:31:41 Okay. Can you only do parts and leave labor or can you understand what I'm saying? Like can you click that plus sign? Okay. So... you, can, you, if you click it off, you have it's everything.

SUSAN

1:32:03 Everything. Yeah.

SAMANTHA

1:32:06 Okay.

SUSAN

1:32:08 And another option, if, you know, really don't want to, you know, if you want, if you got to have like materials bundle, but labor not is back on that invoice prep screen.

*--- Quote templates ---*

SUSAN

1:32:18 You know, you could keep everything vague and if you wanted to have on the invoice specific details about the labor, you could just copy and paste the specific details about the labor and put that in the description. And so they can see that there and then in the actual items, it would be different.

*--- Quote templates ends ---*

SAMANTHA

1:32:41 Okay. So.

SUSAN

1:32:45 Yeah. So that's invoicing. So we talked about... that component as well as we've you know, we've gone over scheduling as well, a few different, you know, reports that have been run. And then very briefly, I do wanna touch on how we actually help you execute on planned maintenance jobs.

*--- Recurring maintenance ---*

SUSAN

1:33:04 So when, you saw that was initially set up to repeat automatically every three months. So if let's say I wanna go ahead and get December service or opportunities schedule that, I can just go over here to service opportunities select next month. And this is going to generate everything that's coming up due in the month of December. I can check on this and then, you know, let's say they're all planned maintenance visits and I can create these in bulk. So that way all these services that are due randomly throughout the month of December, for example, and the best by Dallas, I can go ahead and put them on a single job. So we're not wasting a bunch of time going back and forth.

--- Dispatch ---

SAMANTHA

1:33:46 It...

SUSAN

1:33:47 I won't create these jobs, will mess up the demo. But then from there, once those get created, we can head over to our map base scheduler. This is a demo account. So there's a lot of different services in here that would not be in yours. And then jobs do by let's do next month... you've got a bunch of different filtering options on here as well. But basically, you would just go through and all these unassigned and unscheduled jobs. All you have to do is, you know, click on that, see what's going on and when it's due. And you can just, you know, for example, go here and go to December. I can drag this and have Adam do this job. So change to Adam's color and then I can drag it on the schedule for him and that's basically how you work through and make sure none of your plan maintenance is gonna fall through the cracks. And then would that be helpful? Yes?

SAMANTHA

1:34:48 Okay.

SUSAN

1:34:49 And this is also nice. So you can change this to job scheduled for this month in this instance. And now you're going to have a map based view of everything that is on the schedule... and you'll be able to move that around as well. So we can just make sure that everybody's you know, going to places that makes sense. And of course, you can change, the date parameters on that as well. And that kinda ties back into, you know, going back to the very front page. Of course, you got your schedule and where at based on your most recent clock events. But when you go down here, this is another check. So any overdue jobs without appointments or any jobs that appointments do the next couple of weeks. So, you know, those are going to be immediately actionable. And we talked about, those two buckets as well. But I also did want to show you just the way that you can also run reports on quoting opportunities in aggregate.

--- Quoting ---

SUSAN

1:35:47 So, you know, if you wanted to say, like if you're having a conversation with a customer, you could easily pull up by, you know, that particular location and have a conversation about all the outstanding deficiencies, what their status is, you know, did that get turned into a quote?

--- Tech On-site ---

SUSAN

1:36:01 What's going on? That's that's pretty much a high level overview? What did I miss in terms of gotta have nice to have?

SAMANTHA

1:36:14 I didn't mention it, but can I see what the GPS stamp looks like on their clock end block out?

SUSAN

1:36:22 Good question. Yes. So we've got that here on the job itself.

PHONE CALLER #1

1:36:37 It's right here. So I click on that.

SAMANTHA

1:36:43 Does it alert you if they clock in and they're not there?

SUSAN

1:36:47 Yeah, that, see that little danger, son?

SAMANTHA

1:36:52 Okay. And then you can.

SUSAN

1:36:55 If they, if they forget to clock out, you need to adjust it. You can do that. And then the other piece of this is I always want to be clear about this.

--- Tech time tracking ---

SUSAN

1:37:01 So service trade is designed to track billable hours only like every all time is tied to a job, you can run exports, you know, by just simply going over to jobs. And then, you know, job clock events... for, you know, all the different categories for, you know, whatever technician for whatever time range and export that to a CSV. But we're not a replacement for you clock in for the day, you clock out that kind of deal... that all that can be exported to CSV. What?

SAMANTHA

1:37:36 I'm sorry, it's not going to allow them to start creating an invoice or a quote. And if they're not clocked in, correct? Cool.

--- Tech time tracking ends ---

SUSAN

1:37:48 The, the, and just to kind of provide clarity is like we really wouldn't want the text even doing a quote or.

SAMANTHA

1:37:57 Correct.

SUSAN

1:37:58 Doing an invoice. So... like they can, when they go in, yeah, they let me just.

SAMANTHA

1:38:09 They can with the information to do that.

SUSAN

1:38:13 They can, they can basically just, you know, provide information. But like you technically can turn on the ability to quote or invoice from the field. But generally, most folks don't do that. A good portion of the time. It's usually just like reporting information back to the office.

SAMANTHA

1:38:29 So, can they clock in when they get to the office? Does that make sense? Because they all come here, but, well, I mean, they're not going to in the future, but right now, they all come here and they start their time as soon as they get here. Like if they're suppose to be here at seven, their time starts at seven. So, in some cases...

--- Parts management (inventory) ---

SUSAN

1:38:54 But is the time from that seven o'clock onward tied to a specific job?

SAMANTHA

1:39:00 It can be, but it can't be, sometimes they are here to get materials to like restock their truck or, you know what I mean? That's kinda like bound Tim as far as not downtime from like it's not billable to a customer. It's it's time that we're paying them to do their vehicle inspection, you know, restock their truck, if they use materials the day before or whatever, like if you know, and for them to get direction if needed on the which in that could be a whole nother thing.

SUSAN

1:39:47 It's it's a workaround to do that.

--- Tech time tracking ---

SUSAN

1:39:49 So basically, you would have to create like a weekly ongoing job for every technician for an internal customer that would be yourself. And they would have to clock into that, you know, and describe what they were doing. Generally, our customers are happiest when they have an alternate system for tracking general payroll like that. So like, you know, the time that they're spending their non billable hours like a pay locity or Paychex or whatever. We're really designed to track billable time.

SAMANTHA

1:40:26 Okay.

SUSAN

1:40:28 Is that something that like you need with a field service management system to have that like all in one?

SAMANTHA

1:40:34 With that particular, I mean, it would have been nice, yes, because ultimately, we're still going to be paper, you know, if we don't, if it's not available, then we're still going to be paper because so he can take out some of that to continue to hold them, you know, like responsible for, you know, in being honest.

--- Tech time tracking ends ---

SUSAN

1:41:03 Gotcha. Of like, yeah, like being here. I mean, so you really, I mean, you could certainly do it. I mean, it wouldn't be a huge hassle. Basically, what you would do is you would create a customer with all's name and you would assign all the text to it, you know, and the job would run for that week basically and they can clock in and out of it... for that and you would have that time keeping, but... you know, and, we have an add on called service time card that, you know, that's also available that's more for like tracking pto sick time.

--- Tech time tracking ---

SUSAN

1:41:43 It's not a general like I began my workday at seven am and I ended my workday at, you know, 327 po.

PHONE CALLER #1

1:41:53 Or whatever.

SAMANTHA

1:41:54 Okay. So typical human resource type stuff like... time off vacation and all that stuff that's not included, that would be considered an add on?

SUSAN

1:42:11 Yeah. That, that can be an add on. But even with that, it's like... it's not designed to be, it's more of like a human resources function with like pto sick, TAM et cetera, is not designed to be like a punch on for the day I punch out.

*--- Invoicing ---*

PHONE CALLER #1

1:42:26 All...

SAMANTHA

1:42:27 Right.

SUSAN

1:42:28 So, like most let.

SAMANTHA

1:42:29 Quickbooks anyway. So looking at that like Quickbooks would do the payroll. This is basically just the service.

*--- Accounting integrations ---*

SAMANTHA

1:42:44 Okay. So just said Quickbooks would do it. Perfect. It's been years since I use Quickbooks. I mean, like a long time go when we use Quickbooks... we use the Microsoft like the Google calendar, like it goes way back.

SUSAN

1:43:10 It's it's funny because like, I personally don't have a Quickbooks log in. So like I have to like refer off of like videos and like things that I see on like demos with our Quickbooks expert that's in house. So like wait, go back. What, what?

PHONE CALLER #1

1:43:23 What's that over there? Yeah, how.

SAMANTHA

1:43:26 You know, the thing with BuildOps. Okay? So BuildOps, they don't have an inventory issue with Sage in tech.

SUSAN

1:43:35 See. Okay, there's something up with Sage intact that I fully clearly do not understand because everyone has a good time with them, but no other Sage product.

SAMANTHA

1:43:43 Well, Sage and tech cost 30,000 dollars to implement. And... it is geared for a company that is 100 100 employees or more.

--- Accounting integrations ends ---

SAMANTHA

1:44:04 So, of course, while I'm in the demo with them, I'm like this is awesome. And this is great. I have a quarter of what you're talking about like, I don't have 100 employees like this would be awesome if I did. Unfortunately, I don't I mean, not, unfortunately, I would not want 100 employees, fair enough problems with just the ones.

--- Accounting integrations ---

SAMANTHA

1:44:26 I have 100, you know, that'll be like my problem times four. So I'm like that just wouldn't be feasible for me. And so they don't have a problem with that program in the integration, but they have a problem with Quickbooks and the integration. Yeah, that feel like they were trying to upsell me like.

PHONE CALLER #1

1:44:55 But into a different company, right? Well.

SAMANTHA

1:44:58 Tell me tonight, you use Quickbooks and to use Sage in tech?

SUSAN

1:45:03 Gotcha. Yeah.

SAMANTHA

1:45:04 Something that I can't like is way too much worse for me to like even use. So.

SUSAN

1:45:11 Yeah, I mean, and with our onboarding, like part of it is making sure that, you know, it's going to work with your Quickbooks like that is we understand that as part of it, but everything you're describing the basic needs of like keeping track of what parts were used by whom, and where, and when, like you're not asking for anything unusual or niche or strange, like all of our customers that use Quickbooks need to do basically the same thing that you're doing.

--- Accounting integrations ends ---



PHONE CALLER #1

1:45:40 So.

SUSAN

1:45:43 I definitely get that. Does it, what other things are springing to mind?

SAMANTHA

1:45:50 Spell it for me.

SUSAN

1:45:53 May I ask where are we in the running of, the 14 different options right now based on what?

SAMANTHA

1:45:58 Okay. Well, they're not 14 options anymore. They got to the point where when people would call me, I was like, look, there is not a damn thing that you but will show me that I've not already seeing like, you know, my God, I do not even want it like, yeah, so I personally do not feel that ServiceFusion can serve us. I think that like just because our demo went through roadblock after roadblock, and it was like God, you know, and they're like there's a lot. Even they said there's a lot of mountains we'll need to climb on this one. I'm like, yeah, unfortunately, you know...

PHONE CALLER #1

1:46:46 Weirdly.

SUSAN

1:46:47 Feeling impathetic for the surf speech of Salesforce?

PHONE CALLER #1

1:46:50 Yeah. Well.

SAMANTHA

1:46:51 I mean, I'm like I'm not gonna sugar code it for you but, you know, like actually came from residential like, you know, and I forewarnd her during our interview. I'm like I promise you like it is so different like you can say and you can like, yes, I can. This, I can, this is a different beast like this is totally different. And she did not believe me.

PHONE CALLER #1

1:47:21 Where are you at now actually?

SAMANTHA

1:47:23 What I was saying was true as most people do not believe what I'm saying when I say is, very different like it's just totally different. Now she does. Now, she, she's like she was not lying, damn it. But, you know, I think that, you know, you're on the top and I'll be honest with you.

--- Quote templates ---

SAMANTHA

1:47:54 The only major issue and this is just like I said, I'm, very transparent is that labor material difference on the invoices. I mean, that, that's that is a major issue simply because of what our customers require from us. I mean, but I get what you said as far as doing the copy and paste and just putting that in your description.

--- Quote templates ends ---

SAMANTHA

1:48:21 I mean, so that is a workaround versus it being like a deal breaker. You know what I mean? Like I think as long as there's a workaround and they can actually see, you know... we have a, we have transparency, you know, the big thing with the materials. And this is why because with residential customers as you will know, I'm sure you've heard or I hope you've heard and if you haven't then I'm gonna like you here if you're ever just extremely transparent, you say a props 90... these mugs are gonna go on home depot.

--- Pricing ---

SUSAN

1:49:09 And they.

SAMANTHA

1:49:10 You just charged me 10 dollars for 58 cent per press, not that press on, it would ever be 58 cents, but I'm just using that and I don't know how many years ago, how many arguments that I got into with a customer about, okay, but you don't understand... one, what you aren't seeing is home depot bought all those at container pricing.

--- Pricing ends ---

SAMANTHA

1:49:44 And you know what I mean? Like if they didn't get hit with the 300 percent mark up that on copper. And, and so you almost have to educate people on pricing. And but then there's some people that you cannot educate on pricing because they think they know everything. So that's the only that's the only issue that I saw like as far as I was concerned, what about you?

PHONE CALLER #1

1:50:11 Well, all the thing like you said with maybe in warehouse management?

SAMANTHA

1:50:19 Yeah, I ask.

PHONE CALLER #1

1:50:24 Is that, is that trackable?

SAMANTHA

1:50:26 In the program? Because we didn't ask that question complete maintenance?

--- Assets ---

SUSAN

1:50:30 So, like when you...

SAMANTHA

1:50:31 Well, do you know, like the...

SUSAN

1:50:38 So, so the way, that is actually a non workaround by creating an internal customer. So you create an internal customer, you list out all your assets like the trucks, the, whatever that's all. And then as work gets done to them, you just update what was done to them within the asset so you can either make that be a job that's tied to it or you can just attach like PDF, whatever is easiest.

--- Recurring maintenance ---

SAMANTHA

1:51:09 Right. Okay. That's kinda like what we're doing. Yeah, that's kinda like now, yeah.

SAMANTHA

1:51:19 You know... yeah, we...

SUSAN

1:51:23 Do we could do that? So you would set it up? You could set it up to like, let's say you want to service your.

SAMANTHA

1:51:29 Inspection like it would be, you know, you would set it up like that like 12 would be a customer. Does that make sense? And?

--- Parts management (inventory) ---

PHONE CALLER #1

1:51:41 No, I know so many to make sure.

SAMANTHA

1:51:48 But now, found a way in our program now that we can set up late maintenance in it, right? Which is a whole, no, I mean, that's yeah, but I, you know... I have anything about what the... transfer from warehouse to trucks, warehouse to job, from drug to drug. Yeah, as long as we do all that, I'm...

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

PHONE CALLER #1

1:52:24 Yeah, yeah.

SUSAN

1:52:25 Because it's gonna spit out a report of what got used, where. So you're gonna know where it came from both in aggregate and on the individual work order.

PHONE CALLER #1

1:52:35 So...

SUSAN

1:52:36 That, that's how most folks do is if they see something they like got used from one, like when, during that whole like qa eval process... when they see something like got used, it's like crap like I need to go, let me go ahead and replace that camera. And then you've got that check on it in aggregate to go out and do that. Yeah. Now, I'm like I'm starting to like, I'm curious if I had a separate service.

SAMANTHA

1:53:08 I can't talk to sorry?

SUSAN

1:53:12 I do wanna check and see how other people have solved the whole granularity around labor but not.

PHONE CALLER #1

1:53:20 Display what items would use.

SAMANTHA

1:53:23 So...

PHONE CALLER #1

1:53:25 That's her.

SAMANTHA

1:53:27 Sorry, you're fine. There is this elderly woman and I'm telling you she will call here 100 damn times a day. It's Caroline Davis, we sent the proposal over to Kevin.

SAMANTHA

1:53:45 Okay. Sorry.

SUSAN

1:53:47 You're... but yeah, I'm curious to see if there is a, is there's not a workaround but like a better way than the copy and paste function of that. So I want to, that will be my action to ask about that. So... in light of that, so it's real. So it seems like we have a way to solve for it. It's not perfect. But it's solvable, anything else that we can think of?

SAMANTHA

1:54:14 This time, I don't think.

SUSAN

1:54:17 Does it make sense to talk about how much it costs? Yeah, perfect. All right. Let's head over.

PHONE CALLER #1

1:54:25 Her.

SUSAN

1:54:29 And I will share this screen and don't worry.

--- Pricing ---

SUSAN

1:54:32 I'm gonna e-mail everything to you. Okay? So we do our pricing per technician per month build annually to as you may have seen on our website, unlimited office users, any time somebody's using it, you know, that office view as opposed to the tech view and the app. You can have two folks or 12 doesn't matter.

--- Customer engagement ---

SUSAN

1:54:56 So a few things that might be of interest, it with the premium plan, I can kinda see you guys going either way. And of course, you can always like upgrade later on. So one thing I didn't show but would it be more than happy to is our service portal. So that's a step beyond those service links with the ability for your customers to see all of their appointments go in and request service on a particular asset, see all outstanding deficiencies. It's just, a big hub. Is that something that is a nice to have from the beginning or what are your thoughts on that?

--- Customer engagement ends ---

SAMANTHA

1:55:33 Yeah. I mean, it would be nice to have.

SUSAN

1:55:36 Just show that to you real quick because it's cool... the customer portal. And this just attaches to your website. Like you just add a blank Wordpress page to your website and then we attach a plugin. And so like once they're logged in, they're going to be able to see like I said, all the today's job.

--- Assets ---

SUSAN

1:55:56 So they can click into that job and number, see the service link for it. And then they can drill down to the asset level at a particular location. And, you know, for example, on this one, we can see all the deficiencies that are there and request service on that particular asset that will trigger an e-mail as well as create a blank job.

--- Assets ends ---

SUSAN

1:56:19 You just have to schedule it out from there. And then they can go in and see all the open quotes as well as efficiencies that are out there. So that comes with, the premium package. And then the other piece that's really nice is customer support for multiple pricing contracts.

--- Pricing ---

SUSAN

1:56:40 Like I showed, you can technically do it in premium, but the customer support, if you run to any challenges with, that is a premium feature. And then 24 seven emergency support as well. If you ever need to sub contract work, the ability to do that. So that's where premium latin... without those features, we would just be on select. So where would you think about like wanting to start with?

SAMANTHA

1:57:07 Probably be the premium.

SUSAN

1:57:11 Perfect. Okay. So with premium and eight folks out in the field, let me go over to my calculator.

PHONE CALLER #1

1:57:24 Or that?

SUSAN

1:57:25 Premium. So I just do that because we have a base of five technicians. So eight times 12 times one 39 takes you to an annual recurring cost of 13 344. We take onboarding super seriously. With our premium package. You get access for 90 days to a dedicated project manager who is going to be making sure your text know how to operate the program.

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

SUSAN

1:57:52 We have online certifications with videos. They can walkthrough as well as a demo account. They can play in. It's. Weekly phone calls, unlimited access via e-mail to your project manager, making sure everyone's ready to go, making sure you're data is going and clean your customer lists are going in clean from Quickbooks into service trade and just making sure that Quickbooks connection is solid really just wanna make sure everyone is rock and roll in. And I know you had a bad experience with like nebulous onboarding. We have specific dates that are available for onboarding right now. It's either December first or December fifteenth is the next like when you can get started date and then it rolls on from 90 days from there because we wanna make sure at the end of that 90 days you are good to go. You are.

*--- Pricing ---*

SAMANTHA

1:58:47 Take nine to, for the onboarding hold on baby.

SUSAN

1:58:53 Do you get access to them for 90 days? Some folks can do that a little bit faster, but I would say absolute, at minimum, I would plan for roughly 70 days.

SUSAN

1:59:10 Is that in ballpark with expectation?

SAMANTHA

1:59:13 Yeah, yeah. Yeah.

*--- Pricing ends ---*

SUSAN

1:59:17 So it looks, you know, we've got the group together here. What else needs to happen on your end for a decision to be made?

SAMANTHA

1:59:25 Just gotta get with the group and we gotta go over some things and I can definitely be back in touch with you stop.

SUSAN

1:59:33 So, what I'd like to do just as a kind of final thing is, you know, we always like to schedule kind of, the follow final like follow up check kind of as soon as possible just because, you know, it's hard to, I struggled to remember what I ate for breakfast yesterday. So, when do you think that soon as you guys could chat and potentially get back together would be?

SAMANTHA

1:59:59 I'm gonna be leaving for the day here in a minute. So, and... probably be, we would probably know something by Monday, okay?

SUSAN

2:00:13 So, can we throw some time on the calendar for like Monday afternoon? Yeah, that's fine. Okay. What? Monday afternoon? I'm free?

SAMANTHA

2:00:22 On Monday, Tuesday. Sorry. All good because it's my daughter's birthday. My God would be in so much trouble.

SUSAN

2:00:32 Almost my anniversary is on the eleventh and I was like I got a both present real fast sneaks up on it every time. But yeah, Tuesday, I'm open until two on Tuesday. What are you all got?

SAMANTHA

2:00:47 Let's see. I say 10 a. M. Yeah.

SUSAN

2:00:53 Am is good by me and I'm gonna, so in terms of the deliver roles I'm gonna send, I'm gonna send over like onboarding overview, the Quickbooks overview. I'm gonna dig around about, the labor issue that we talked about. So, is there anybody else that wasn't on this invite that I need their e-mail address that would be part of the discussion a few emails?

SAMANTHA

2:01:17 Okay, perfect. Yeah, they were just here just to see thing as a team pretty much around here. And so like I let people come in and see certain parts of things so that they can have any insight.

SUSAN

2:01:37 Very good. Well, I'll put that time on the calendar for 10 am on Tuesday, the fourteenth and always like to ask us right before we go. Any other lingering thoughts



that we haven't discovered any hesitations. Bad. Babs. Awesome. Well, enjoy the rest of your day off.

SAMANTHA

2:02:01 Here. We've already had senior photos once she's a senior in high school, and my youngest, and we've already had them once and now we have to have them again, so.

SUSAN

2:02:15 Well, but so you're continuing to do work with just in a different capacity is what?

SAMANTHA

2:02:21 Yes, absolutely. Like, well, yes.

SUSAN

2:02:24 Well, good luck with that. I really enjoyed chatting with you all, the transparency and the discussion and we'll be talking soon. All right. Thank you. Thanks. Have a good one. Bye you too.

SAMANTHA

2:02:34 Bye.

*The End*