



# TFP Weekly Call (ongoing)

Kurt Dillmeier with Total Fire Protection  
Recorded on 4/27/22 via Zoom, 1 hour 27 min.

## Participants

### **SERVICETRADE**

Lindsay Carter

Adam Gurley

*Customer Success Manager*

Joshua Schaefer

### **TOTAL FIRE PROTECTION**

Shaunna O'Rourke

*technology champion*

### **OTHER**

Shaunna

# Topics

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# Transcript

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

--- Call Setup ---

LINDSAY

0:00 Hey guys. How's it going doing?

SHAUNNA

0:04 Hello? Hey, Lindsay. How are you... doing well?

LINDSAY

0:10 Awesome. So, Joshua is joining me. Joshua is our project coordinator for this project and he's here just to help keep track of some of the data conversation and things like that. Adam will be joining us later. I left him on the call with the coordinator so it could be on time for this one. So they're working through that agenda and he'll hop on via phone with Kurt. He is free to do so, but I would like to go over the list of things Joe sent me yesterday via email.

--- Call Setup ends ---

LINDSAY

0:38 But before we dive in, does anyone have anything top of mind or right out the gate outside of that list Joe sent yesterday?

SHAUNNA

0:47 Only because I think a lot of my existing store, great, but they didn't have a feeling today and we have a series of questions from that. So maybe Robin rates if you want to just fire, right? Maybe Lindsay, hi, Lindsay. How are you doing well. Thanks. How are you guys? Good. So I just have a couple of points. Maybe we could touch on. Maybe you can explain to us how we could navigate this through search so that you have a question in regards to an invoice. So we sometimes have a couple of customers that we do pre-built before. Is there a way to invoice inside of Sarah service trade before going through the entire process, the service for process?

LINDSAY

1:40 I mean, you, can, you have to have a job setup because you can't have an invoice without a job?

SHAUNNA

1:46 Okay. So if we have a job setup and what we don't have to schedule something before invoicing doing.

LINDSAY

1:54 No.

SHAUNNA

1:55 Job, that job has to be completed before, right? We have pre-built so some reschedule. So the job gets created. Sorry, I see. So the quote would be approved by the customer and then prior to the schedule and we can create an invoice to that job?

LINDSAY

2:15 Yeah, exactly. Yeah. So what's the nature of the billing? You just Bill ahead of time or is it like a subscription based billing was?

SHAUNNA

2:24 We have, we have a few various customers where will require perhaps downpayment payment, and we need to be able to generate invoice against the job. You know, you'll be a thing or we have a COD customer. We're expecting payment. They have service technicians arrives with set it paid more than what the customer doesn't have time to make a prepare whichever payment method they elect to use. So just, I don't think we ever asked that question before, but that is a perfect answer. So thank you for that. Well, wow. I'm certain. I think linked to... that, we do want to set up. So the one I actually have after that... if we have, if we have... a quote out to a customer for multiple locations, would we have to create a job for each individual location? Yeah... we've already built it to go to one building that has 20 cents and we're going to still do the work for all 20 times. Is there a way to break it out by or is it only my job?

LINDSAY

3:44 It's only by job. So every location like you can only have a job on a location. So if you wanted to break it out, you would just need to break it out by, you know, the location being the building, you could even maybe add the tenant apartment or whatever as the asset possibly, or just make note of what the scope of work is and what you're actually doing for all 20. So that will be 20 jobs on the same location. We're one one job on the same location with 20 tasks?

SHAUNNA

4:19 Tasks?

LINDSAY

4:21 Yes, three services.

SHAUNNA

4:22 Was it was when you say task? Is that something that's job specific on the, show us what the task?

LINDSAY

4:32 Yeah, it's just the service.

SHAUNNA

4:36 Service timecard. COVID.

LINDSAY

4:38 Yes, if we go here... this is a job for christies turner's house and she has two services on here. So this technician knows that they need to repair the deficiency and this extra service on the quote. So the single location you can have as many services on this appointment as you'd like you can span over the course of multiple days. But that's essentially what I mean by task. Like what is your tech? What are you sending them to do that's what the services?

SHAUNNA

5:14 So we have... this is the one where, yes, Patricia located hundreds of, and then we have to do. So we have wonderful day. Bye bye.

LINDSAY

5:30 You can invoice, you can do a partial invoice. So this has already been invoice. It's still in progress, but I can create another invoice, if I want.

SHAUNNA

5:40 Service timecard. It will say it's the same job. So it gives you can invoice on a work order by, of course. Yeah... yeah. All job in essence, it always right? Yes, right? Which?

ADAM

6:00 Yes.

SHAUNNA

6:01 Perfect. That job is the word quarter. This is the text. Yeah, it's has... for us would be like a sub section, work quarter D too, right? That's what we can think of it as the, because we job is to work. Cool. Okay, defer to make... it was wondering... this is step one customer, which one? Yeah. Yeah. Yeah. So at minimum were stopped by location, correct? Yeah. So we have to break that invoice. Definitely, we can talk to one candidate. Now would be generic ones.

LINDSAY

6:50 That's...

SHAUNNA

6:51 Question. Now, if we had our metrics, sorry, I'm not sure... if we're serious situation. You chime in, create one invoice for multiple, for example, we have, we

sometimes have, we would, if... we sometimes have a, we would do.

ADAM

7:14 Hey, proposal.

SHAUNNA

7:15 Vacate quote for numerous locations. Is there a way to, I guess copy that well? And then we'll have on them? Or if we have to send out the between my horse, is it, how would that work for our codes jobs?

LINDSAY

7:32 Yes. So we have Christie is a house here. We can add a quote. So let's just add something quickly here. And you want to flush this out. So you can do a quote per location. So if we needed to do 20 quotes, we can do that for christies location here, or we can do one big quote for this single location even if there are multiple things that needs to be done. But if you don't want to do it that way and you want to do several. So let's just say building HP, seeing you don't have that source, say that's fine... on... we have a whole month to schedule it. It's a one time service. Let's say you've typed up everything you put your parts and labor and all the stuff that you're quoting them on here. You can then copy the quote... and you literally just have the same thing. But another. And so you could, you know, parse it, whatever is different. You could put, of course in the quote description. But yeah, you can copy the quote.

SHAUNNA

8:44 Within the application with Kimberly. Wonderful. This is not exactly the same location or a copy of the quote and send it to somebody else. Can I do that?

LINDSAY

8:56 No, for that, you would want to set up a quote templates. So if you have these setup, so you have a fire alarm deficiency, quote templates setup here. So if we go back to any location, let's say empire state building our students some cool. Okay. And then we want to add a quote here. So let's just go ahead and create that quote. Let it load. We have the option to apply the court template. We'll choose the one that we want in these and then boom, there you go. So if you have a, you know, a service on that quote templates, things like that, you could all that would be added in.

SHAUNNA

9:41 I think we can adjust these. I think we can trust that question completely enough. Okay. Yeah... I got... one one one other thing. We have a, wow. This, is there a possible to add a stage between when a job is completed and reviewed, but prior to send it to the billing team or prior to invoicing?

LINDSAY

10:13 Not sure. I'm following that. So.

SHAUNNA

10:16 So the jobs completed, the tech checks, all the boxes all worried about that. It goes to a... more, if we go to the main page. So job, the jobs, right? And to be, completely, yeah, Jonathan needs to be completed. And then one step process, it's okay for invoice.

LINDSAY

10:37 Right. So, the only way I mean, I can't add a step in there, I mean, outside of process. So once the technician completes the appointments on a job, it's just he's he or she is just literally completing the appointments. So that would show up in this bucket here, past jobs to be more complete. So who, whoever is responsible for marketing jobs complete in your office? This is the bucket they need to be checking on the daily.

SHAUNNA

11:02 Once, once they market complete out of there, and then it goes to the next job slot, job, completed jobs to me, it was that's correct? Is there a way from completed jobs to be invoiced instead of previous cute?

LINDSAY

11:17 No.

SHAUNNA

11:18 I mean you could, my opinion. So... rejects what the operations team says, done how we work.

LINDSAY

11:28 I guess you would reopen the job... and.

SHAUNNA

11:34 You people are not complete?

LINDSAY

11:36 Yeah.

SHAUNNA

11:37 So go go to a job. Okay. Yeah. So jobs just love to solve and stuff. Yes. Yeah.

LINDSAY

11:47 Yeah.

SHAUNNA

11:48 Jonathan ready to be a news?

LINDSAY

11:54 Sorry, collapse this? So ready to be invoice. So.

SHAUNNA

11:58 I just don't I don't want, I don't care. So.

SHAUNNA

12:06 So, the question is right. So the billing team is going through the queue ready to be invoice, and they see something that they don't like there's something missing there's a question. They want us to go back to the operations team. And we want to be able to tell you hey this through this back to the call. So some time or whatever. So, how can we work flow? That, is that, so, you said?

LINDSAY

12:36 Like what you said, create a tag?

SHAUNNA

12:42 Yeah. Yeah. I need to do, we need to attach a customer sign off or something too, right?

LINDSAY

12:49 And yourself a comment?

SHAUNNA

12:50 Here... right? And then how do we?

LINDSAY

13:00 So that.

SHAUNNA

13:02 Sent back, we'll reopen the job. Okay. Do that goes back to work too?

LINDSAY

13:07 Correct. It goes back to the queue where we just were so literally the previous.

SHAUNNA

13:16 Yeah... that information that was put back. Is that listed anywhere in the job... but...

ADAM

13:30 A...

SHAUNNA



13:30 Trial trial?

LINDSAY

13:32 Like your history here?

SHAUNNA

13:37 True. Yeah. Yeah. So my job status update schedule. If we were to take this one right now, well, we didn't cancel the job. We, what we said, it's not done also if we set it up on our main site, more services included. But what we just did, where does that?

LINDSAY

13:58 Here we're I change the status of the jobs and job status updated to complete 11, 12 Pacific Time, job status was updated to scheduled. So that is the, that is the status before completed.

SHAUNNA

14:13 Is that going back to far? Because there's not, we haven't rescheduled, it's still, it's...

LINDSAY

14:17 The only option. So it's the only option. So literally the system, the product, it only knows that scheduled comes before completed. So, if you take it out of completed, it only understands to go back to scheduled.

SHAUNNA

14:33 Sit in the schedule. So.

LINDSAY

14:37 It goes back. It literally goes back to what we just talked about. It goes back to pass jobs to be marked complete?

SHAUNNA

14:43 That's fine. I see all... their point because for them, it's job, it's scheduled. It's done. It's invoice. There's nothing that you guys see this guy guys?

LINDSAY

15:00 Hold on. So you see all work has done, do you see how you have check marks here? This is literally telling you that a technician is completed the appointment. So the appointment is what the technician sees on their mobile app and completes the job. Is what your office staff, an admin staff see to complete. So it's a different thing. But this is what determines if it lives in this bucket. So that's why whenever you uncheck completed job or reopened the job, rather, it immediately goes back to this bucket right here because it requires, so.

SHAUNNA

15:33 Over time will be checked off, it's not going to know the technician will not to say that they did the job. Yeah.

LINDSAY

15:41 Right.

SHAUNNA

15:45 Yeah. What did you say? Nervous? Like a dispatcher is going to send the technician out. Again. It's after I got, okay, that works perfect. That's perfect. Right now. Israel integrate with like little like a British far kind of with that being said with users a picture or something.

LINDSAY

16:07 Yeah, it'll be whoever it is. This is what my picture for this demo account looks like. This is a fake person Johnny make tech. And then this is Adams. So you could do their initials. I recommend that some companies don't want their tech pictures or their staff pictures and just depends. So you could, you know, get into a Google doc or something like that and just some color coding and initials. I think that option works really great. Yeah.

--- Pricing ---

SHAUNNA

16:35 Hello. Okay. Cool. That is good news. Definitely could do that. That's perfect.

LINDSAY

16:41 Awesome. What else you guys?

SHAUNNA O'ROURKE

16:43 Yeah. The only thing I want...

LINDSAY

16:48 To update on quickly was.

SHAUNNA O'ROURKE

16:50 Those annual dates. I'm finishing up all the monthly accounts. I already have all the annual and semi annual schedules populated. I'm finishing up, adding those annual dates for our monthly accounts, and then I could flip that over to you.

SHAUNNA

17:06 Okay. My spreadsheet watch on.

SHAUNNA O'ROURKE

17:09 Yeah. I have a spreadsheet. The first data dump that I pulled out of inquest, didn't have the correct naming conventions. So I had to go back, rework it and do some formatting, but I'm on the monthly. Is it's all I have left? So.

SHAUNNA

17:25 What, what was the service line?

SHAUNNA O'ROURKE

17:28 For every service line?

SHAUNNA

17:30 So that, yes, yeah... yeah.

SHAUNNA O'ROURKE

17:35 So, I have all the schedules, what frequencies there on and I have all their annual dates. I'm just like I said, it's only the monthly is I have to go in because monthly is the report that I use to pull that information.

--- Pricing ends ---

SHAUNNA O'ROURKE

17:51 The monthly is going to show that the next state that were out there is may first 2022. That doesn't necessarily mean that's our annual, and we need to know those dates. So I have to manually go back into the system and check those out.

SHAUNNA

18:05 Okay. That's tied to the service location, correct?

LINDSAY

18:09 Yes. So, the...

SHAUNNA O'ROURKE

18:10 First time it was then I had to re, pull all the data and now it's going to be linked with the service location and those naming conventions that Lindsay had shot over last week, I believe it.

SHAUNNA

18:21 If we get that in, we've solved for scheduling issue for the most part. I...

SHAUNNA O'ROURKE

18:28 So, yeah.

LINDSAY

18:30 This is the spreadsheets on her?

SHAUNNA

18:34 No, I do not close.

SHAUNNA O'ROURKE

18:35 Yeah. I've been working on at all week, which is one of my other reports haven't gone out. I didn't I kinda under wraps because I didn't want anything to go portly, and.

LINDSAY

18:48 Hi, this is no small feat. This is a lot. Yeah, it's...

SHAUNNA

18:51 Lot of...

SHAUNNA O'ROURKE

18:51 Information. Yeah, I'm thinking like I said, I have monthly is.

LINDSAY

18:58 It's every...

SHAUNNA O'ROURKE

18:59 Account manually. So.

SHAUNNA

19:01 Yeah. And it's probably Friday at four o'clock sure.

ADAM

19:07 O'clock, in Texas.

SHAUNNA O'ROURKE

19:08 That tomorrow... I'll just get it done no matter what, because I know it's a huge win for us.

SHAUNNA

19:17 I'm sure. While I got suffer through this for a sec on a sprinkler team saying there's teams kind of investigate very like they're going, we'll have the schedule with the service schedule estate, I think to go back in class for that division, which is like a really stale data. So, for that division.

LINDSAY

19:44 Yeah. Yeah. So the sprinkler?

SHAUNNA O'ROURKE

19:48 That...

LINDSAY

19:49 Is...

SHAUNNA O'ROURKE

19:50 All whole entire other and animal.

SHAUNNA

19:55 Correct.

SHAUNNA O'ROURKE

19:56 It's based on the service items in inquest, it's like a calendar that we populate, I'm able to pull the annual date out but I still need to do some manual work on that end. But 80... the issue that I'm having with the sprinkler team?

LINDSAY

20:14 Is they?

SHAUNNA O'ROURKE

20:15 Have internally reset things or push work off schedule. Things weren't done. Things were done and didn't alert me and my team to go ahead and quite an update the schedule there around research that we're trying to do.

ADAM

20:34 And...

LINDSAY

20:34 Hey, was...

SHAUNNA O'ROURKE

20:35 That semi done on schedule? Do I need to adjust it because we want to clean data over into service trade? So that one, I'll be able to provide the annual dates, but I'm still trying to figure out the back end, how to get the full calendar schedules pulled and go over it with the sprinkler team.

SHAUNNA

20:54 Okay.

SHAUNNA

21:00 Which would be your questions... correctly CB already. So I have a question, sure. So we send out invoices from service chaining, Kelly is find the email address is sent from.

LINDSAY

21:26 So, what do you mean? Like if you go in here, actually let's do it now?

SHAUNNA

21:35 Address, the email address that comes from is influencing NTSC one time. And that way the customer has a question or it gets kicked back for whatever reason.

LINDSAY

21:45 We...

SHAUNNA

21:46 Are suddenly monitoring that specific email address to cash needs?

SHAUNNA O'ROURKE

21:50 Hovers.

SHAUNNA

21:50 Or, you know, customer name, regional governance, the invoice, and we managed to continue that. Is there a way that we can have the invoice sent from... email address? Basically, we're seeing what email ERP, so send me, I'll be some more since they would like to have that email address being reference CLP one laptop, but they want to see invoicing. But instead of grace active, we want that job, right? Or wrong. It's engineer.

LINDSAY

22:23 I don't think so. And Joshua correct me if I'm wrong here... Adam, is that you? Sorry, I'm not, I can't see everybody. Great. It is okay. So he's joining by phone. So it'll take a minute to get connected to audio, but I'm glad he's able to join, but Joshua, Kurt, correct me if I'm wrong, it's gonna come from the person who actually sends out the invoice link in service trade.

SHAUNNA O'ROURKE

22:49 And I...

LINDSAY

22:49 Believe how this has been resolved in the past is adding like a permanent comment essentially email, you know, invoicing at TSP one for any inquiries or what have you? Yeah, yeah, I don't think that that's changed, but, you know, never know, not always in the know right away. But I think that is going to be the only way because I can't there's not a way for us to change who it comes from like instead as a default... outgoing.

SHAUNNA

23:26 Down in term, which is where this is all invoices... now... but it's something that goes for invoicing. Yeah, she said that she sells from.

LINDSAY

23:42 From Intacct. Yeah. So.

SHAUNNA O'ROURKE

23:45 Roman to answer your question and...

SHAUNNA

23:48 Sure.

SHAUNNA O'ROURKE

23:48 It's linked with our outlook. So as long as she has the invoicing email attach with her outlook, would she does there's a toggle where she presto, she wants it sent out of the invoicing mailbox so that all responses can go back to that one.

SHAUNNA

24:06 Wonderful the borders. And by those, I mean, people releasing invoice, Tino, awesome. I'll definitely be access to book and wish to, when you release it invoice, just switch it... the same way that at once, which is it was through from... column. If you want, you can ship on her. I will put in what's in incentives seconds... but I'm sorry, the search feed is going to link to our outlook... possibly if you want to send, if we were to send this invoice to be right now, how that all came from?

LINDSAY

24:55 To do it. And then you can check your email.

SHAUNNA

24:59 That's my two cents a month.

LINDSAY

25:05 Come from me. So, Joe the... onsite, what's your email?

SHAUNNA

25:13 J, alright. Yeah. Alright. You're a tip one dotcom?

LINDSAY

25:28 Good.

LINDSAY

25:32 Alright. So you should get it, but I believe it will have my user information... but let's...

SHAUNNA

25:41 So... which I mean.

SHAUNNA O'ROURKE

25:49 Hello?

SHAUNNA

25:50 She goes, not users. Yes. So what does anybody who's in, which is the one thing that is because we don't they don't need their email address, they have to log in for been working. So that would they lose anything?

LINDSAY

26:14 Yeah.

LINDSAY

26:25 So, it might take a few minutes. You know, you can always an Adam, I mean, I'm fairly certain it just comes from the user and there's no way to really change that. I'm definitely an idea. You know, creating just the invoicing user, however your history and your audit if someone makes a mistake will not be.

SHAUNNA O'ROURKE

26:46 Accurate. So, I don't I have.

LINDSAY

26:47 To say, I don't recommend that.

ADAM

26:50 They don't the one thing that I did think about is the last time that you and I were talking about this Joe, like your team was going to be responsible for sending the invoice lake. So Roman and raise those individuals would be the ones creating the invoices and sending the invoice links. We could like in that regard, we could make romans email not his user name, but he's email invoicing it, TFT and the same for grace. And that would be one way to do it.

SHAUNNA

27:20 Yeah, that's one second since the user, we keep the names and when we switch the email address associated. So I'm not gonna say one, right? What else would you be doing in the system settings, right? And then this is all that it came from and we're seeing and not our... ministry. Nobody has a tag and then you would put it, you would have, yeah. Okay. So email address? Okay. I think that's all for me. That works. And... she never said that either. So, but I'd say.



SHAUNNA

28:00 Phone now and... down. She'll be joining us shortly. We just send them the link. Was there any other stuff out of the building? Quote we get the... data?

ADAM

28:17 One quick thing I, I'm sure Lindsay told you but we just got off a call with Zack over at a court it.

ADAM

28:30 The, it is going to be possible we were talking about cbre and what that looks like in your account. That is going to be possible to merge that into a single entity and then get that taken care of in order to do so. What I'm going to need from the team is a list of the customers that basically what we're going to do is we're going to using continuing to use CB already as our example. We're going to merge that into one entity with all of the locations under it. And then I'm going to work with sack to get the proper builds who's associated with the locations in Intacct. So.

SHAUNNA

29:21 So it was all right. Okay, Shawna. I don't think I spoke to you about this... data, got maybe a day one Atlanta got David got loaded up into service free sample, they location accounts, each location, that setup as a customer as opposed to one customer with multiple locations. Okay? And CPR is the prime example for example, like rain. But I think I sent you that one out of where it had one customer and thousands of locations, exactly how it should go. That one word, some reason, but CPR LinkedIn. So we're going to need to identify all the CV always first sort of we can...

SHAUNNA O'ROURKE

30:06 Adam, correct me if I'm wrong, you guys did that and split it up based on the Bill to addresses, right? So if all the filters were 1,166, those grouped together, if it was 11 33, those grouped together, correct?

ADAM

30:20 Correct.

SHAUNNA O'ROURKE

30:21 Yeah. So that won't be a problem. And that's why rainbow all went together and wasn't an issue because they all have a 1,000 Pennsylvania as their billing location. I'm gonna need to pull a new file from.

SHAUNNA

30:35 So, you know what? There might be a different distributors shoulder?

SHAUNNA O'ROURKE

30:39 Baby baby?

SHAUNNA

30:42 Is set up correctly? Just description of the cost of labor. Does give class.

SHAUNNA O'ROURKE

30:49 Yeah, because I do remember Adam explaining last time that it was based on those filters and that's why service trade kind of treated accounts because they're going to separate entities when you send the bills and treated as separate companies. So I could definitely, I'm gonna need to pull a new file from Quickbooks anyways. Since we, I mean we enter hundreds of accounts. So we're gonna need a fresh file. Let me consult with Fabio if I could do that either tonight tomorrow or Friday. And when I do fresh data, I'll go ahead and group all of the account. So it's not.

SHAUNNA

31:30 You might not have that much because we're already blocked off. Yeah.

LINDSAY

31:33 So, yeah, this is sorry, this is something I want to talk about. I spoke with Jeff yesterday, so you guys are already live. So all of this data is already live and in play. And I talked to Jeff yesterday and we, there isn't a real way for us to bulk merge... locations and customers.

SHAUNNA

31:57 You see if you disagree, they started.

ADAM

32:01 Disagree with that. But so basically what it's going to boil down to and what we need to make sure we're up here. Yes. Okay. So in this instance, if we were to merge CB, it's just for a moment. Hypothetically we merge CB already into one company entity, or I think we had there were three that were distinct that were named different things, whatever that is. We could have CB already, whatever it is west CPR east. And then CB already made whatever that looks like and then have... three entities rather than the 40 and 50 that are in there. Now, what it would mean though is for an accurate Bill to Zach and I have talked about this three to have for CPR invoices to have an accurate Bill to their invoices would need to be sent out of Intacct rather than out of service, right?

SHAUNNA

33:02 Hello. Yeah, that gets a little funnel. How about this? Let me give you a different approach.

ADAM

33:09 Okay.

SHAUNNA

33:12 Let's say doctor on the phone right now, maybe we're lucky here and we haven't done anything because normally one division as far on what it is we do anymore, receive you already, yeah... who you said we have for certification? What does it mean to leave the low? We delay more customers that we haven't done anything for it. Can you Julie this is kind of a bigger question. Okay? Do it a couple of customers into the system to append existing customer list? Because solicitor you're working off of Lindsay that we're working on this library is from February or March, whatever. We added a bunch of customers. So the question is, and they would consult with CPR reprocess way if we can do an append to the existing customer list for all new customers and locations. Maybe we should we load the ones that didn't go in, right?

LINDSAY

34:17 So we can, if you can give me an export of your new customers, you've added since February tenth, we can absolutely get those in. Now, we're going to be deleting anything that is going to need to be scoped in.

SHAUNNA

34:34 To pending on the wireless with this... we could go in. And so if there's nothing hanging off of a customer right now, do we have the ability to service trade, delete the customer?

LINDSAY

34:52 Sort of. So let me just show you so you guys can see my screen. So if I go to try to find one that's similar here, let's just pick one. So all of these do have actually go back. This is the same only thing that's different is the... postal code, so we can merge this company into. So I can take CBRE, I can find the one that I want. This is where it gets a little bit tricky, but it can be merged. So this is your demo account. So I'm just gonna do it. So we confirm this merge. It cannot be on done. So I'm deleting Jericho cbre here and emerging it into Madison avenue. Okay, that is absolutely your prerogative you can do this at the location level or at the company level in the UI. However it would not be a fast process just based on the number of cbre companies that you have in here. So if we're you know, if we want to talk about deleting customers that you haven't done work for that's, a whole thing that's a whole big process.

SHAUNNA O'ROURKE

36:05 Hello, can you go with the two locations?

SHAUNNA

36:08 Because now it's two locations and it was wanting to know in this exact.

LINDSAY

36:15 Yep. So.

SHAUNNA

36:16 No. So the other two locations, the one those the Jericho, but now is the billing address for Jericho automatically 650 minutes.

LINDSAY

36:26 That's right? That's what this is saying.

SHAUNNA

36:27 That's what we want right now. We have different Bill. We have different filters because by location, yeah, do you have any plans for, to get the rest accounts for one account? Yeah. So what are six different customers around? What it would affect? Yes, that's right... there's one called CD already there. They service different locations. We Bill CVRD. Are we, in some cases, you might see various customers directly... some customers... by the domain, the language customers correct? So... sorry, I forget... how many senior, every single one, six or seven? Okay. So if we have six or seven senior resume, that... will be fine, whichever the root one is figure out which ones CVRD really.

SHAUNNA O'ROURKE

37:47 Most of these.

SHAUNNA

37:51 What do they want the same time? Is there a, is there a CRM right now... for... senior product? What is the address? Dash B, L la... right there at the top, right? Yeah. Yeah, that's... true. But it also have all the same Bill to patient. So, so let me ask you this, right? So what if we do this? Because this might be a better way to do with this tool because we know our customer base.

LINDSAY

38:37 Exactly.

SHAUNNA

38:38 So, with... recreate a custom report, CB already beyond that has no page. And instead we go through this list and merge. It always say that customer right there. Could we have a location? Obviously, you know how good day.

LINDSAY

39:02 Basically what you're doing. So let, let's actually just try it, so.

SHAUNNA

39:12 Thank you.

LINDSAY

39:13 So if we want to merge, I'm gonna edit... viewing, right? So we've just updated the name of this company and this is your demo account. Again. So we're not doing anything wrong with this specific. The specific company has a single location associated with it. So I want to merge company. I'm saying this is my winter. So this is the one that lives in. I'm saying CB... just grab this top one. I don't have anything

but it has a generic location, those on the customer list. I'm gonna merge that into... February, be away. And then now I have both of those locations that exist.

SHAUNNA O'ROURKE

40:04 So Lindsay, my question is, and I know this is the demo account and there was just generic information, but we saw it on the live account to that. All of them just show up as cbre. I'm gonna have to go into each individual one?

LINDSAY

40:17 Yeah, that's the tricky part. So.

SHAUNNA

40:23 Talking about, so Sean, your... billing address? Yes, sir, somewhere service located down in that county. So.

SHAUNNA

40:40 This might help. No problem. I think we generally six push leads CPR in this will be a way by billing address. So the customers names in the CPM dash and what that field is, this little spiel with capital... data was probably want to quote and then keep that space. We have those six that we keep stationary. And I was having to open up one, you know, which ones argument to based on the answers... to go version into based on the items because it's gonna say on it, what's the Bill to have it is built in. It's going to be... our off season regain everything. Yeah, I think he just put them on hold on. I'm wondering and the work, the merge a screen.

LINDSAY

41:29 Yeah. So the, if you want to merge here?

SHAUNNA

41:34 Yes. Yeah. Just stay here. This is what's gonna remain. We're gonna open up an account. Yeah, let's say this was probably see what we see that this would be or whatever it is. I need to see it there. Anything that I know we covered now, you know, it's for example here, you know, this, I think merge let's see here. But do you do on the left side? You don't know... you don't know this one but you see the Bill to can be changed into now contains the into.

LINDSAY

42:03 That. So I just did that. If I take that into away merge into. So if you're trying to merge into be a way, it is always going to be, you have to look, you have to pick which one you want before.

SHAUNNA

42:16 Can you take the merge from first and then emerging us doing nothing wherever.

LINDSAY

42:24 Pick this first.

SHAUNNA

42:26 Yeah. Yeah. I mean, what can technically, I just do this one right now. Just part of this one right now. I don't see peer review or some tax.

LINDSAY

42:42 Go where?

SHAUNNA

42:45 What location? So those 10, yes. Why is it happening with that?

SHAUNNA

42:57 So I'm not sure they're seeing?

LINDSAY

43:02 Yeah, I think, Shaun, I think you have a good handle on this. So essentially, you have to look.

SHAUNNA O'ROURKE

43:08 Hello, sure. Your faith in me, Lindsay. So I'm assuming based on what I see what graces question was with the Hoovers that merge from was already that was grouped together based on the Bill to which was all those Hoovers. So if either one location with all those locations already, everything's gonna shift. So this is us, but I know how to do it. I'm following the logic of it.

SHAUNNA

43:42 But those should be able to hear again exactly.

LINDSAY

43:45 So, the main thing the main takeaway here is if you were going to use this tool whenever you pick a cbre, I'm just gonna pick another.

SHAUNNA

43:53 Locations you'd...

SHAUNNA O'ROURKE

43:54 Have to.

LINDSAY

43:55 Hello. Yeah, you'd have to look what you're merging, yes.

SHAUNNA

43:58 Right. Well, that's easy enough. No, just because the verbiage to that one has 10 locations. We moved... locations, some of those when the data was loving, it should accomplish. Well... now, hold on.

SHAUNNA O'ROURKE

44:23 He does happen... guys real quick. CB already does have an over account. What when do you didn't do the previous time? Because we were just showing as an example of the merge was drop down that locations. And if she dropped down those locations, it would.

SHAUNNA O'ROURKE

44:44 Exactly. I would.

LINDSAY

44:45 Have...

SHAUNNA

44:46 Okay, guys, I think we're good. So, what we gotta do is... showing overall onboarding that those are taking the best. If we can do an extract of the customer list, see if the problem is just cbre or it's going to be anything with it. Wouldn't be any customer with two different Bill to address. This is Christian and Wakefield testing different build to that customer setup differently... do a search on company to Christmas SH a N.

SHAUNNA O'ROURKE

45:19 It's gonna be new mark. So it's going to be questions. It's the SL greens that's for nato's we have.

SHAUNNA

45:24 I want to see how that goes.

SHAUNNA

45:31 So, I mean, if it was just CB already, I would say we would do it manually. It's gonna be a few that it's going to be a few of the big Sean. Do you think? Do you think if maybe you hire we could, we could merge these accurately?

SHAUNNA O'ROURKE

45:46 So, I'm right now pulling a soft list of the data in Quickbooks so that I could try to see what exactly we're going to be working with. I think between me and you, we would be able to get it done. I mean, we always figure out ways but I don't want to commit to it without knowing the monster that we're going to be handling?

SHAUNNA

46:10 Be it's gonna be anything that has it's going to be whatever has a different bills.

SHAUNNA O'ROURKE

46:15 Yeah.

SHAUNNA

46:16 Within a company that has multiple locations and how prevalent?

SHAUNNA O'ROURKE

46:23 It's so, yeah.

LINDSAY

46:25 I wanna make sure you guys. So if this is the company. So let's just open this.

SHAUNNA

46:30 Tab right... now.

LINDSAY

46:36 This is also hold on and this is also the service site location if you need to send the Bill to the service site locations, and this is set up correctly in service trade. So I really want you guys to be cognizant of that and not merge everything just to have to and merge it.

--- Pricing ---

SHAUNNA

46:52 So, so for example, 86 chambers, I don't believe that many push notifications go to is the same as chips. So I don't think if this, if we did a 16 percent discount that we... made, it should go to.

SHAUNNA O'ROURKE

47:09 Hello?

SHAUNNA

47:15 Can you just see where the chamber should be?

SHAUNNA O'ROURKE

47:18 Yeah, I'm going there now, it's just delayed and side note, a total of 562 new accounts have been entered since February tenth.

LINDSAY

47:30 Can you get?

SHAUNNA



47:30 On out? Seems like, yeah, definitely just have to figure that out but show on.

SHAUNNA O'ROURKE

47:36 That was just a soft pull up the data based on the start date that was entered into those accounts. So it could be more that's just what came back without doing the full single user admin. I'm just a little...

SHAUNNA

47:49 That's a request from Quickbooks. Now that's Quickbooks is a one five.

SHAUNNA O'ROURKE

47:56 That's everything needs to be entered in QB one. So it came.

SHAUNNA

48:01 Okay. And my...

SHAUNNA O'ROURKE

48:03 So, it's currently frozen, so.

SHAUNNA

48:05 So, let's do fixed for the sake of time... Roman and she'll want to keep you guys peel off and come up with a plan on us. I think if you want to actively do this, I think we can get it done with. I don't know what a reasonable timeframe would be, but it's definitely do.

--- Pricing ends ---

SHAUNNA

48:27 Yeah, I'm Sean, I know you're busy as well. I mean... I guess maybe after the meeting, we could give you a call. We could look at it together. I think that was realistic.

SHAUNNA O'ROURKE

48:38 Yeah, ones, the data stops falling. I will flip it over to you and we'll get on a phone call with that and we'll figure it out one way or another. Hopefully, it's not too many, but.

SHAUNNA

48:51 Anything?

LINDSAY

48:53 To hold on one second, Shawna and Roman if you want to talk about doing like a bulk delete of customers, meaning we literally do it through the API and talk about,

you know, what that would look like. We can certainly talk about that just so you have it in your back pocket.

SHAUNNA

49:12 And they do, that would be, if we do that, you're saying that will be charged?

LINDSAY

49:17 Definitely, yeah.

SHAUNNA

49:18 Definitely. I love it. I love it. The we'll have to have the live now.

SHAUNNA O'ROURKE

49:33 So one thing though with room and Joe and respects. So this, I do know that it's important. I'm wrong. I'm probably not gonna touch base with you until tomorrow. To be honest, I don't wanna lose the momentum on the.

SHAUNNA

49:51 I see what you guys do is analyze that data, see how many customers are affected, how big of a deal that is. And then we do this. It sounds like is for the customers that don't have anything attached to, we should delete them and include that in the upper lower above the new customers.

SHAUNNA

50:22 Okay.

SHAUNNA O'ROURKE

50:23 Yeah, no, I follow you Joe... first step as me pulling the data, what do, if no jobs or anything active has been done with the fire alarm team, then we go down the route of deleting and re uploading with the proper information, which I agree with Joe, but because that encourage a different charge that is all on you.

ADAM

50:49 And I think that based on all of this conversation right now, what we're looking at is Shawna enrollment humor your task? Is the site, find out what kinds of base we're dealing with and if it's feasible to do it manually doing it manually, make sense if it's unfeasible for you enrollment to manually do this?

SHAUNNA

51:11 Awesome.

ADAM

51:13 We've got plan B as a backup and... we can burn that bridge when we get to it.

SHAUNNA

51:20 Hello? Hello? Hello that... weekend... anyway. So if I understood you correctly, your initial work around was a work around that we're kind of still be slack. So we should probably just scrap that. We don't really have any in tax issue with this. So you're using, you can tack to kind of work around this problem. So, I heard you correctly when he first came on.

ADAM

51:55 That's correct? I think that... yeah, I... is every theory that we have right now, it hinges upon Sean enrollments findings like once we, once they get back to you as to what this looks like, well, there's a separate discussion that will have to be had, but we need an accurate picture of what's going on.

*--- Next Steps ---*

SHAUNNA

52:20 Okay. My, I really want to like fix things quick. So so on the enrollment, if you figure it out tomorrow, I don't want to have to wait until X, Wednesdays call to come up with a plan. So, Sean, I'll take a look at it once I come downstairs as well, I'll try to find my own findings and as much data that I present to us as possible. And then you and I can touch base first thing in the morning at.

SHAUNNA O'ROURKE

52:45 I have the west thing right now and it's loading in Quickbooks. So as soon as that's done, I could switch over to you for you to review as I finish up the annual dates. And definitely tomorrow morning, at some point we'll hop on a call.

SHAUNNA

53:01 Really worry too much about you guys, but, you know, getting Adams time, getting lunch time probably.

*--- Next Steps ends ---*

LINDSAY

53:06 So let me just be clear about something also. So Adam is absolutely important for dealing with process oriented things. But if we need to do anything that is data related that requires another team that I would need to facilitate that conversation at that meeting. Okay? So, so ultimately any data decisions would come down to me and our data team. And then of course, you Joe, whoever is in charge of pulling the trigger on your end.

SHAUNNA

53:33 So, Lindsay, if it turns out because I think this is what's going to happen, it's going to be a delete upload.

LINDSAY

53:40 Yeah. I mean, I do think, I think, yeah, that's why I wanted to offer that because I think once you guys get the lay of the land and you see what you have to work with based on the process that I just showed you in the UI, which is the only option to do manually. Then we need to talk about how to accomplish that with a data expert.

SHAUNNA

53:59 Okay. Yeah. I mean, I know this is like after, but do you think that's like a long process or you think that?

LINDSAY

54:06 Think, I mean, depending on, you know, it's definitely out of scope. So definitely has to be paid, which of course, I mean, as things go when you guys understand business, you know, if it's paid, we can prioritize and we can rearrange what maybe needs to be rearranged and prioritize on the data team side so that we can accomplish that sooner rather than later.

SHAUNNA

54:30 Every thing that I see on the list, this is the biggest one.

LINDSAY

54:36 Everything hinges on your customer data. So before we even start to tackle, yeah, I mean, even with that services file, you know, if we're changing those location names, that's gonna throw things off now given we will have failures, but all of the rest of the data hinges on this customer data. So I cannot stress enough. This needs to be solved first. Okay?

SHAUNNA

54:58 So, like with every, put everything on the email I sent you has to be done. So we have to sequence that we have to sequence it that's fine. Great... greatest maintains outside of service trade. But obviously, we want to sort of say going forward will the pricing listed? So there have been some price increases since we loaded the dial list up. So somehow we need to understand how to do we have to do update our price list in a fall away and I don't know, let me type in every number one. I think that I believe there's a way to do that, right?

LINDSAY

55:41 Yeah, absolutely. Yeah. It's customer facing because we, yeah. Well, we can also facilitate that while you're still in implementation. Go ahead. Adam. Sorry. Didn't mean to cut you off there?

SHAUNNA

55:57 That, that is really an operational thing with you. So even after the implementation is done, yeah, we're going to want to have a mechanism to do that from time to time.

LINDSAY

56:07 Yeah, absolutely. And it's here for you. So it's yeah, you can absolutely do this. It's a very simple process. It walks you through. You do an export of your items, update what needs to be updated and then do that.

SHAUNNA

56:19 Hey, Daniel, can you just stop copy that link and send the degrees?

LINDSAY

56:23 Absolutely. Yeah, absolutely.

SHAUNNA

56:28 Yeah.

LINDSAY

56:30 Yeah. Basically, it's literally. Yeah, it's the step-by-step is exactly what we would do if we did it for you.

SHAUNNA

56:37 Okay. So that, that's straightforward... I'm gonna put a check.

LINDSAY

56:42 We'll get that.

SHAUNNA

56:43 Done.

SHAUNNA

56:48 The invoice presentation, we launched out, I guess, dial back end?

ADAM

56:54 No, sorry. I'm driving to rural North Carolina, not tipperary last service on bad.

SHAUNNA

56:59 I had a couple of the form. Now. Come on. So the invoice presentation, vice chairman at all. We don't ever want to happy hour thing for after you put it in. I don't know for fish. Okay. Alright. Thank you. You're done on your end, correct?

ADAM

57:16 Yeah, because the only thing that wasn't on there was invoice route and gray said that wasn't a big deal. So I think we can sign off on that.

SHAUNNA

57:29 He's got. Okay. Bye... customer service. Adam. I think you and I talked about this. So we have know 30 60 90 she'll be whatever. There seems to be a field in service trade to handle that. But I don't think we have a logo or do you guys have a template that we can?

LINDSAY

57:56 Yeah. Go ahead on.

ADAM

57:58 Hinges upon that customer data. So again, that's one of those things Lindsay and I've been talking about that behind the scenes, we've got some, we've got some ideas on how we might be able to handle that. Let's again our solution and what we can do. And just upon attaching payment terms to customers et cetera. So we need to do that first.

LINDSAY

58:22 Yeah. Well, let's...

SHAUNNA

58:23 Just pick a day. Alright? Bye.

LINDSAY

58:26 Joe, can I give you exactly how that would layout? And Adam, please feel free to correct me if I'm wrong, but I went over this with Jeff yesterday. I'm just the set of questions here. So essentially, if we need a specific payment terms for, you know, let's say a 1,000 customers, they all have different payment terms.

--- Pricing ---

LINDSAY

58:43 You don't have a default or standard. And as far as your payment terms go, the only real option there is to create a contracts for each of your customer and set those as the default set, whatever the payment terms that are on that contract. So, so that's the option there. So Adam is absolutely correct. We have to make sure that this customer data is done. We, that has to be literally completed before we can tackle these other things. But I wanted to give you an idea of what the process would look like. They're...

SHAUNNA

59:16 Yeah, I don't know if I've got solution. If you go with the service, right? There is a field that the customer will allow that you can... get the customer while. But that's where I want to populate. We definitely saw that somewhere. I don't remember what to do.

ADAM

59:39 Alright. So the terms is account based and so useful those options that populate... something else. And.

SHAUNNA

59:57 Data. Whereas that, that's what we're talking.

LINDSAY

1:00:00 Yeah, this is account base. So this is for everybody. This is gonna, this is gonna go to your service contract. Okay? So service contracts, standard contract. They're interchangeable terms and service trade.

SHAUNNA

1:00:12 Is there and put that to customer?

LINDSAY

1:00:16 Only with the contract?

SHAUNNA

1:00:18 Out a contract. I mean, you can't deal with it. You couldn't do their address type of like customer address phone number... and then the next option B payment terms.

LINDSAY

1:00:31 There's there's not that doesn't exist in service trade Kurt?

SHAUNNA

1:00:34 Let me ask is let's just say we're creating that. I'm going to July, we're creating an invoice in search and we're building search, right? I imagine going to have this is just Quickbooks data in tax. So what we create invoice, we just look at the current selection stats intact and just... equipment say, and so they're they just switching starting to see a day. Well, so that 60 to net 30, let me put that on the invoice. Is there in terms of when you create an invoice, you could put in terms of invoice, correct? Yeah, that's right? So maybe it's just the chat that we do, what we use in TalkDesk viable, not this text is Oracle licenses, right?

--- Pricing ends ---

SHAUNNA

1:01:27 This is theoretically have a billing system. Almost. We decide that they have an invoice number. Now, no, that's one more step. I think checking tack and see what the status of candidates. I think you'd have to put a tag on the location. I mean, essentially, okay, it's not gonna do any good because not because of the ability to double check to make sure influences the problem turns on all text search.

SHAUNNA O'ROURKE

1:01:58 Is the tag show right at the bottom there? Correct? If they did a tag for 30 60 or 90 or do on receipt when they're in the invoice, correct? Yeah, yep.

SHAUNNA

1:02:09 Problem. I said that a customer status can change, it's. Gonna change the tax, right? Collection?

LINDSAY

1:02:16 Hello... if you need to update the tag, you need to update it at the location level. So for this location, empire state building where you did the work, you would need a net 30 tag on it. So it would flow to whatever jobs you created and on. So if you needed to update the tag moving forward, like let's say after this Bill has been paid, you would want to do that at the location level.

SHAUNNA O'ROURKE

1:02:40 Yeah. And Joe, it's very similar to how you have to update things in Quickbooks and sync it over to inquest above.

SHAUNNA

1:02:50 Saying, you know, we're interested in those tags now.

SHAUNNA O'ROURKE

1:02:54 If you're updating, let's say scheduling contact person will need to go into Quickbooks enough data and then go into that location in class and update it. So it's the same type of process where they need to make sure that both systems are in sync, whoever is updating those terms.

SHAUNNA

1:03:14 30 deal or do you want to sort of see... do you have a, do you want me to challenge? Reasonable? Yeah. So, so should we ask them to just me every receipt? And then we just updated as we go? So at least it says invoice. Do I see where it's like a customer complaint and say, I'm net 60 hotels. This is there when the, is there a way to let's say we have the customers, we have the customer list to what we believe would be our lightning. Is there a way... to mass upload tags to now?

LINDSAY

1:03:59 Yeah, you would just, we want to add that to the basically if we do a new import or if we do a customer or we want to do it at the location.

SHAUNNA

1:04:10 That's fine. That's not a problem that's the same.

LINDSAY

1:04:12 We could do a location update.



SHAUNNA

1:04:14 Put it onto BuildOps spreadsheet. We want to help customers with us on the call today. Sure. So I'm gonna argue with your procurement. Lindsay. We have... the, we have an upload of all the data right now from Quickbooks into service trade. Customers are portable that, right? So I would recommend because we have a methodology. Let's load everything up into that mapping now. And then if you want to change the customer configuration, do that master pushing, let's solve for 90 to 95 percent of the invite to be filing side.

LINDSAY

1:05:03 So, I think so. So essentially, you want to just do this tag thing and payment term thing before we combine customers or merge anything, delete anything?

SHAUNNA

1:05:18 That's what I'm thinking because you don't have to worry about the London lines up to two, right dynamic... because we're never heard about that, right? What do we do this with? Done? And then we, we've got to explain and we will fall right right... awesome all this now and try to like do an asset for, you know, update?

LINDSAY

1:05:44 Hold on hold or stop. So no, that's the caveat. I cannot delete customers. We cannot do that in the use the API. It's not possible if we have assets on a location or anything that has happened at that location, it becomes impossible.

SHAUNNA

1:06:01 Okay. Alright. So, so just limitation. So we just gotta be careful. What about?

LINDSAY

1:06:08 Terms your terms. Literally. The only way I can assign that to a specific location is with the contract which would come after we figured out the customer data. My data team is not gonna work contracts and to your customer data solidified, I can tell you that right now.

SHAUNNA

1:06:23 Okay. What about tags here?

LINDSAY

1:06:26 So, let me show you can't see my screen. Let me share something else.

LINDSAY

1:06:35 Can you see this?

SHAUNNA

1:06:36 They can do with this? Yeah. Yeah.

LINDSAY

1:06:42 So we can create tags before. I mean, I want to float this by Jeff first and Adam, you may know, but I think we can create tags and then we could do a bulk delete and then re import your locations, but whatever wasn't deleted would still have the tags. So what if we're deleting and then run essentially how it would work? Is we're deleting customers and locations, and then we wouldn't be re importing just a basic import. We're not merging anything because it's not really possible in bulk anyway. So I think that the tags we need to come second to fixing the customer.

SHAUNNA

1:07:22 You know, I've made a suggestion but you got another system better, right? So what I'm saying? So that was just thinking how I would say just.

ADAM

1:07:36 So...

LINDSAY

1:07:36 The the...

SHAUNNA

1:07:37 Logic. Yeah, I get it to a customer terms that, alright... okay. I think we are able too, and I think done at a job board, but... was... he told me yesterday they did not want to upload the assets, building reports into service? Great for the files? Yeah, some issues. I don't think he wants to do with what she was on the phone... just to confirm that he wasn't on the call and she said she had scheduled lower so that might change the pin, but we'll keep that as a placeholder. But I do have the fire extinguishers. So... cool. Adamant I talked about how to build out those marketing. We should do that process. Looks like you guys download them, service credit, do some manipulation before you guys load it back up to list, lot of backup. So if we have those steps, we can load the fire extinguishers into the system.

LINDSAY

1:08:51 Yeah. I mean, so I need to let me partner with Adam to see what you guys have talked about. Yeah. Okay.

SHAUNNA

1:08:59 And then the customer knows what are we doing there added for we could do that as well. Okay?

LINDSAY

1:09:06 It just requires, so I'm gonna say though that it would need to come second to correcting the customer data because we can do a comments import, which I think Dylan did for some of the contact stuff. We just added them as comments to a location. But we can certainly, we can certainly do that. We just... need, we need the data, you know. So we need your customer data as it as it's going to be moving forward so finalized. And then we would need the comments and we would need a way to match the comments to the appropriate location. Okay? To all of that is

doable. It just depends on where this data is coming from. And if we have your customer data set in the live account as it needs to be moving forward.

SHAUNNA

1:09:56 So... okay. The data mapping plan will have to come out. So, so see what is short enrollment, get together by the bar, right? So we're having to deal we have, and then before we do anything, we've got a reconvene and just figure out everything. Just do, let's just assume.

LINDSAY

1:10:22 Yes, exactly.

SHAUNNA

1:10:23 Hello? Sorry, I can't get around how the customer data... and then, so we have a map, all this crap based on our historical sponsor. I just don't work. But so if you guys got a smart guy Scott?

LINDSAY

1:10:39 Hello? Yeah. Yeah. So, Shawna, I feel like, I mean, Shawna, maybe I do, I just have all the faith in you... but I feel like you understand just by the way you talk about it. So if we have your customer data, which that isn't it. So we have it here. Your location import ID is essentially, I don't know if I have it open. No, I don't that's another customer.

SHAUNNA O'ROURKE

1:11:07 That's the unique reference code that goes exactly, yep, name? Yeah.

LINDSAY

1:11:12 Yes, that's what we need in that already exists in your Quickbooks. It already exist in the export of your customers from the live account from a service trade.

SHAUNNA O'ROURKE

1:11:24 That's that, that's the mass.

LINDSAY

1:11:26 Or this is what needs to be for us. It, and I feel like Shawna already has that.

SHAUNNA

1:11:31 So we have a key. So no matter what we do is we could map it to the key fields as long.

LINDSAY

1:11:36 I'm a new stuff yep.

SHAUNNA O'ROURKE

1:11:37 Yeah, that's what Lindsay sent over to me last week. I've been working on an independent file not to disrupt any data because I didn't know if that was gonna work or not. But once I'm finished with the monthly, is I'll just map it out into the shared copy and we should be good to go.

SHAUNNA

1:11:55 Remember when I call... what I told me that location in for interviews from ServiceTitan?

SHAUNNA O'ROURKE

1:12:02 Is from Quickbooks?

SHAUNNA

1:12:04 For Quickbooks? So when I take the fire extinguisher data out of intellects, and try to map it to a location, how's that gonna work?

SHAUNNA O'ROURKE

1:12:14 It will not have that ID. You have to go. I'm based on the service location name, which those are how they linked together. So if it's CVRD dash P away calling, 11 33 avenues, America's it will read the exact same and inquest because they're controlled by the books billing link. And then from there, you just do a.

SHAUNNA

1:12:38 Isn't it isn't that exact same.

LINDSAY

1:12:40 Yeah. And so that I feel like... yeah, I feel like this is a good, okay. This is what I want to happen. I'm just gonna, I'm kinda gonna try and move this forward with some executive decision making. So, I do want Shawna and Roman to do what you need to do to review the data to decide how you want to move forward. If you want to move forward with a, another conversation around data, then I'd need to know that sooner rather than later so that I can account for just time to get him on a phone call so that we can essentially plan how we're going to execute this because I want to point out that just in this file, like we have a unique location ID'S but if we just wanna make sure we're not getting rid of a billing link ID essentially that is needed. So it's very, it's complex, but it all makes sense. Once you talk through it, I just need to know how you guys want to move forward.

SHAUNNA

1:13:38 Hello? Fair. Okay. Alright. So... do we know?

SHAUNNA

1:13:51 The customers, yeah, yeah, it's contingent upon getting customers, right? Just quick question. We have our next slide is our scope of state and national, they

subcontract out a lot of the work. I think about the best way to use the system. We were kind of thinking of maybe we set their technician... has other customer up as a technician to sub contractor. Is that the best way to handle it?

LINDSAY

1:14:25 No, I'm Adam, please feel free to jump in here. My suggestion is to use the sub contracting feature in service trade, which you would then like let's say your sub contracting to me to put in, you know, some sprinkler heads or something like that. Then they would, you would essentially inviting them to use service trade. You would create the job since you are the owner.

SHAUNNA O'ROURKE

1:14:49 Or?

LINDSAY

1:14:49 Master of everything and your sub contracting that out, send them that some contract a job, they complete it and everything stays and service straighten, it stays structurally how it's intended to be within this.

SHAUNNA

1:15:02 Such a contract I seen, can you, can, what are you guys can send me a video on how to set that up. Yeah?

LINDSAY

1:15:09 And send you the information on that for sure. Yeah.

SHAUNNA

1:15:12 Hey, Jordan manager in there and we have, we just need to use it.

LINDSAY

1:15:15 Yeah, you just have to essentially, the key is you got to invite your sub contractor to you service straight. If they're not, so that they have a user log in and stuff like that. Because if you put them under your account, then you gotta pay form... and it's free. They can use a free account. It's not a big deal.

SHAUNNA

1:15:34 Okay. Yeah. Send me anything and I'll figure it out of any questions. Just an update. I think going reports like starting to code sometime next week awesome. Okay. And just a question for the team. Do we feel like we want to try to Quickbooks? Like on...

SHAUNNA

1:15:57 The side?

LINDSAY

1:16:05 No, you're not you're...

SHAUNNA

1:16:06 I think we need, once we get the customer things down Pat, download start. Yeah, we can import the data over into... Quickbooks. Correct? We still wants to get the customer's credit with all the customers in here. No, exactly what we're looking at Quickbooks. I think it wouldn't work. Cool. So then the question is where we, we've decided to continue to build that Quickbooks for the time being. So we kinda sorta somebody has issues out, but... we have to type everything into Quickbooks. If we don't do that. Quickbooks, like there's a hesitancy on the team here to turn to Quickbooks, like calling because the state of the customer date?

LINDSAY

1:17:00 So, so you can absolutely go ahead and set up the Quickbooks integration. If you, if you'd like to do that, it's looking for an exact name match whenever it's sending that information over. So as long as is it matches, you have, you know, empire state building and that's where it came from. So my guess is you're probably find there, but the data needs to match in both platforms to utilize that integration. If you're billing out of Quickbooks, you can just say if you don't want to do a double entry, let me show you the, this the quick little option there. So you've opened, let's just say for this is your Quickbooks, you've done your thing. Great. You're looking at two different screens, then you go to the job. After a while, you would already be on the job and service trade, you just got a split screen happening and you build the invoice in Quickbooks, you can say invoice job, I already have an invoice number to be one, two, three four, whatever the actual invoice number is. You can put the grand total if you want that way your records match, but you don't actually have to do a full on double data entry.

SHAUNNA O'ROURKE

1:18:14 Wow.

SHAUNNA

1:18:16 Yeah, one one, five, six, two six. So what happens is, so... we send the data over Quickbooks, and we manually type this back to is over seven and the phones. So what are your demonstrating? What actually have?

LINDSAY

1:18:33 If you don't want to set up the Quickbooks integration until you get all of your customer data, right? Because the two platforms need to match that's, how the integration works. And Adam, your, you know, please feel free to interrupt me here. But if you have two screens, so you're looking at the job, you know, what needs to be build. Great. I'm completing the job. I'm going over into Quickbooks. I'm building out the invoice because we don't have the integration setup, then you can come back here to the service trade side and create the invoice. And rather than creating a native service trade invoice, like what it looks like. Generally, you would just say I already have, let me just show you from the get an.

SHAUNNA

1:19:14 I already have this.

SHAUNNA

1:19:20 Exactly.

LINDSAY

1:19:21 Exactly. Yeah.

SHAUNNA

1:19:22 Just for the time being, right? Second. So you do get to that invoice job that's correct? Yeah, do that. But that doesn't always usually.

LINDSAY

1:19:36 Because this is the platform. So it's giving you the option. I already have an invoice because...

SHAUNNA

1:19:44 Nice.

LINDSAY

1:19:45 Yeah, grace just made one in Quickbooks. So she's gonna be like, yep, alrighty.

SHAUNNA

1:19:49 Yeah, I got no. So my thinking is so, so everyone's worried that the data is not going to line up the customer. The problem here. I'm gonna say.

ADAM

1:20:02 So it...

SHAUNNA

1:20:02 Should as well should match, right? And then all of that type of stuff, all the crap that the builders don't have to do to just throw it over to Quickbooks that we've created. We've talked a little fun. We've dumped the table, but they still got setting up an invoice, an email, but at least the data is talking in Quickbooks. Like why are we in turn it on? I mean, unfortunately, I'm kind of thinking that again, that's where I'm in public places like you said earlier the meeting so that we will in 20 influencers, but obviously, that's information. It's more about that we determined that this is what went wrong with this former, right? Let's continue to do. It... doesn't roll forward on 24 as opposed to roll the dice when we need to do 500. I mean, where do you see any reason why now? Why we should return on? I'm gonna, we're not gonna build up service trade, right? But why would they censor, right? Right?

LINDSAY

1:21:07 I think it's fine. I mean, you need to understand how the integration works and what the sync settings are though, which I can send those again in my recap, but I do think that whoever is responsible for setting that up and whoever controls your Quickbooks absolutely needs to understand the limitations and how just literally how it functions and what it's looking for is an exact match. So character prepared or match. So if you change a bunch of data in one platform, it's going to be confused and what it's built to do is if it doesn't find an exact match whenever you send the invoice over into Quickbooks, it's built to create a new customer for you in Quickbooks. So I think really what it comes down to whoever controls that aspect needs to fully understand the integration based on the documentation that we have for you guys.

SHAUNNA

1:21:57 I resend it will take a look.

LINDSAY

1:22:03 So, I think, yeah, I mean, I really, you know.

SHAUNNA O'ROURKE

1:22:05 I have to be honest.

LINDSAY

1:22:06 And I, you know, I'm good. What I do and I've done this for a while. I think the biggest thing that you guys need to be focused on for the rest of this week is a game plan for your customer data. And if you can figure out what you wanna do internally between now and Friday, I can see if I can get some adjust time on Friday so that we can come up with a plan on our end to actually execute the end result.

--- Next Steps ---

SHAUNNA

1:22:27 Alright. Alright. Fair enough. So we're not gonna focus on showing enrollment and we'll task to figure stuff out tomorrow. And we should, what we want is for price.

LINDSAY

1:22:42 I think I want to, I want to hear back by the end of the day just because his schedule is a little bit tight. So I don't wanna, I'm I mean, I can do a tentative us time for what he has, but I want to hear back before we actually meet with him. I'm just on what you Shawna in enrollment find, but I can absolutely set up. Let's see. I think it probably two PM, your time 11 my time.

--- Next Steps ends ---

SHAUNNA

1:23:07 Wow. The.

LINDSAY



1:23:08 Tentative. Yeah.

SHAUNNA

1:23:09 Will have shown it wrong, but it's a couple of 1,000 in loss. No words here. You'll see the patents. Yeah. Well, you gotta.

SHAUNNA O'ROURKE

1:23:22 I mean.

SHAUNNA

1:23:22 Realistically, it's not gonna, it's not gonna. It's not gonna take long... stretch as much like what my, what I think is going to that, okay?

SHAUNNA O'ROURKE

1:23:35 We cut down most of the data by doing fine for duplicate values and excel and will not be quickly what we have working with.

SHAUNNA

1:23:45 And he said you guys already know which data, one role based on the rules of the road. And of course... I have an idea. It's just a matter how many actual account got this is, you know? So one second.

SHAUNNA O'ROURKE

1:24:03 Yep.

SHAUNNA

1:24:05 Okay. Now, again, a big benefit from our efforts here because by the time we're ready to load data, we will have software correct. So I think just to reiterate, I think I did mentioned that you don't wish its core console that they will take a fresh data... sometime in June. So we'll export all service data intact needs, they'll open it up so that they have, are covering five. So if you will.

LINDSAY

1:24:42 So, yeah, I mean that's definitely what needs to happen as far as that process. We need to get it right in service trade. And then let Zach take it from there with what he needs. So with an export from what is correct in your live account, move that into your intact.

SHAUNNA

1:25:01 And you don't see any problems with that, right? You guys export the data to drive?

LINDSAY

1:25:05 Yeah, absolutely. I mean, you, yeah, it's yeah, exporting is not a problem. It's just, I wanna make sure that we're we get it right in your live account before you start to building out that live connection because right now he's working from a demo.

SHAUNNA

1:25:17 Yeah. And I think I was one year sandbox. So you guys have thoughts on the sandbox and mature plus. Yeah.

--- *Wrap-up* ---

LINDSAY

1:25:24 Yeah, he's all hooked up.

SHAUNNA

1:25:26 Okay. And then I contracting company to load or restore Quickbooks data into intact. So I'm just wondering with this customer manipulation, screwed me up. We'll see about that. Alright. I see that's. Nice.

LINDSAY

1:25:51 I think, yeah, I think we're I think there's a good place to wrap up, but please, do, you know, shoot me an email between you know, now and Friday morning, you know, if you guys want to move forward with the meeting, but I blocked off a little bit of time for Friday afternoon. It's actually would be two 30. So I hope that works.

SHAUNNA

1:26:10 Goodness. Fine. We're kind of getting the team on our end. You know, this sounds like a mess but the reality is if I look at every single one of these items once we get this customer issues solve, everything, pretty much everything on our list is too. So, yeah... I think, yeah, I think.

LINDSAY

1:26:31 Yeah, that's good. That's everything hinges on. So, I think that's where the focus needs to be for the next few days.

SHAUNNA

1:26:36 Hello? Okay. Let's get it done and then we'll have a successful implementation itself.

LINDSAY

1:26:43 Awesome guys. Well, thank you for your time today. I know it was a long one but I'll get you a recap a little later. I do have another call. Anything that comes up, please don't hesitate and we will most likely talk to you guys on Friday afternoon.

SHAUNNA

1:26:57 Bye. Thanks. Thanks guys.

LINDSAY

1:26:59 Okay. Bye.

*The End*