Followup ServiceTrade Demo with Rich-Tek Industries Ltd

Jonathan Middlemas with Rich-Tek Industries Ltd
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Participants

ServiceTrade

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Rich-Tek Industries Ltd

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Topics

Transcript

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

JONATHAN

0:00 Can you see that?

DAVE

0:00 Yep.

JONATHAN

0:02 All right. So, yeah, remind me again, what were you looking to go over just like setting up customers and serve and things like that.

DAVE

0:09 The, the two things that's just to keep something super simple. Let's pretend that we got a phone call as a new customer and a new site. So we want to add the customer and we want to add the building and the asset to that building that we're doing the service call for.

JONATHAN

0:27 Okay. Yup. So basically, what you would do is let me just kick out of here. So I like just start from like what would essentially be like your home screen? So basically up under customers?

DAVE

0:39 Yes.

JONATHAN

0:40 First thing you would do is create the company. So this is essentially going to be your billing address for that new customer. So you would go to create customer right here.

DAVE

0:49 Okay.

JONATHAN

0:50 Type in the name. So, you know, I'll just maybe try to pull up you guys.

JONATHAN

1:01 So we'll be able to kind of pre fill all this... click save here. So once you've created, the billing address, then it's gonna take you to this screen and you can start building out, you know, different locations. So we would only have one since it's a new customer. And then you would just kinda name that. So.

JONATHAN

1:30 Let me...

DAVE

1:31 Now, when it comes to the location name, is that going to be like the building name that goes with that? So let me go ask a different question. So if we have a customer that we do multiple buildings for, would we set that the customer up and then tag buildings under them? Like, I guess I just, I'm trying to figure out what's going to be the best way to organize it? Because as I said before, is that the same piece of equipment, we can build multiple companies to work on it, right? So, I'm assuming that we would want to set up under like create a customer as the building and then we can build against that or like what what's kinda the best way to do that?

JONATHAN

2:19 Yeah. So, so first of all, I mean, again, you're gonna want to, build, the building itself out. So.

DAVE

2:29 You...

JONATHAN

2:30 You know, any, like what's one of your customers that's kinda set up that way?

DAVE

2:34 Well, let's go. Let's just use Sim. So sedylem, is they're the customer that we... sorry actually xyxylem, my bed.

JONATHAN

2:48 Okay.

DAVE

2:49 Sorry?

JONATHAN

2:53 So, you know, this is just for sake of example, so essentially, and then we will call it, you know, if you have multiple buildings, we'll just do like, you know, building to right... you know, down here is where you'll kinda, you know, pick out, what you work on. So excuse me, let me go down to... you know, fire pump.

JONATHAN

3:26 We'll just, we'll just do the pump, you know, kinda set all that information up. And then, you know, it's gonna tie obviously back to the billing address that, we set up initially to get to this page. Now, what you're asking about is basically to pull up kinda, the homepage if you will. Is the way it's gonna look is, you know... each different building is gonna have its own, you know, file associated with it, right? So under the building that's where you would then come in, you know, build out your assets. So... you know, here we'll do like a recirculating pump, we'll just put in, you know, some miscellaneous information... and then you would create kinda kind of like your service. So whatever the call came in for you to do this is where you'll kinda, you know, build that out so you can create work order.

JONATHAN

4:32 So, let me now that we built the asset, we'll actually build out the service. You can kinda go through, build it all out. You know, manually. You can also just create templates, so you can kinda build out, you know, something that's... you know, maybe reoccurring for you all. So just for the sake of saving time, you know, I'll just use a template. And then once you kinda build out, the customer, the piece of equipment you're working on as well as what you need to actually do at that point, you can create the job. So we'll go out, you know?

DAVE

5:12 Necessary. What's the difference between what you just did versus what you're like adding the job. So like, in the back screen, it has the description of the annual for what we're gonna call it deal service. So what is that? Like? I don't understand what that service is because like if I go, when I was playing with this, if I went to the calendar, I couldn't find that to schedule it on the calendar?

JONATHAN

5:42 Yeah, because it hadn't been, you hadn't created the service. So the services is, you know, the work that you're gonna perform.

DAVE

5:51 Okay.

JONATHAN

5:52 So, yeah, when you go into like your account, you know, the demo account, it's completely blank. So you have to create everything from the ground up. So you have to, you know, create, you know, whatever, you need to go out there and do, maybe your customer just called in and you're going to go out there and just like troubleshoot it because they don't know exactly what's going on, right?

DAVE

6:12 Right.

JONATHAN

6:14 So, you know, you just, you would have to create kind of that service. Maybe it's just, you know, troubleshooting, and once you kinda create what you're actually going to be doing, then you can create the work order which is going to be, you know, we call it a job, but it's essentially going to be the work order. So, you know, we'll leave it, as a service call. We'll select, you know, this annual, but maybe it's just a troubleshooting thing that we're doing at that point. You know, you can actually schedule your technician straight from here if you wanted to if you already knew who is going to be going out there and just the time and date that, you know, we needed them to be on site. So once you create that work order, this is where it's gonna be where you can kinda switch what you need to switch. So, you, know we know who we're doing the work for and what building. But if you wanna Bill it, to a different individual... you know, you would come up here, click manage job and you would be able, to change, you know, the Bill to from like Rich tech over to, you know, I just know we have top golf corporate in here. It's another one of our customers that we do billing too. So you would just, change it here and save it and it's gonna change it, to have you all, once you create this invoice, it's gonna Bill it to that correct, you know, customer.

DAVE

7:42 So then in terms of like the job location, does that have to get tagged to a company?

JONATHAN

7:56 What do you mean by like tag to a company?

DAVE

7:59 So like we can't just create like a building... as a stand alone entity that we can Bill... a customer to. So like again here, typical scenario is going to happen. So zilum is a manufacturer that we do commissioning for. So they say, hey, we sold a pump to tighten fire. They're doing Installation, but we need you to go there, do the commissioning at top golf corporate office. So the job is getting built a zilum, but it's ultimately going to be owned by top golf corporate. So what I have to create the job billing zilum as a location as top golf corporate center or office.

JONATHAN

9:02 I mean, when you create the job, so I mean, essentially, you're gonna want... you know, the asset to live under just, you know, the building now, how you decide to do like the hierarchy of where, you put the building versus who, you know, Bill it to. I mean, I think you would probably put it under, you know, the billing address that you're gonna use. You know, most often... that's just gonna be something that's gonna be, you know, a decision you all have to make internally whether you want to keep it under like the original manufacturer and just Bill it to top golf or if you want to house it underneath top golf.

DAVE

9:47 So again, this is kind of where one of the struggles that I'm really having with making the conversion, I'm not opposed to change. I'm just trying to understand how it's going to work because I'm the one that's going to have to share it with everybody else to teach them how to do it. So if we in a situation where we get the call to do the commissioning because ultimately like the building is either going to be a strata or it's going to be owned by a company or whatever the building is. So it's going to be a simple one. If we're doing a building for... let's say, top golf is building a new warehouse. So the job location is going to be to top golf storage facility. And we're going to be able to build it to top golf corporate office. That's easy because that's not gonna change.

JONATHAN

10:41 Right.

DAVE

10:42 But if we get called out to do the commissioning and it's going to do a strata, but we don't know the strata information because it's still under Construction. Can we change the, what I'm gonna call the ownership of that building somewhere along the way? Or can I create a customer as that building and do it that way? Like, I guess that's just where I'm really struggling.

JONATHAN

11:10 Yeah. I mean, you can, I guess you could recreate, you know, once it changes ownership, you could recreate that building under the new ownership or you could just, you know, really that's why that managed job feature is under here. So that way when it, when it's builds, it goes to this corporation. And then you can pull that information up in the future because it's going to be this work order and everything done and associated with it. Even this pump is going to be housed underneath, you know, the top golf. So I mean, really, it's just gonna boil down to like whatever your preference is to manage your business. We have different options. It's just, you know, whichever one you all wanna take.

DAVE

11:55 Right. So how do I know what options are available to pick? What's going to be the best for our business?

JONATHAN

12:06 Yeah. So I mean that's pretty much, you know, what we, what we've looked at, you can either have it housed under, you know, if this company, was the manufacturer or if you wanted, to change it, you know, here and build it to a different entity.

DAVE

12:22 Right. So can I create a profile for the job location? What I'm gonna call the building. And then if I want to schedule a service call, then I can assign who is getting billed to.

JONATHAN

12:41 So let me just open up another tab just to make sure. So, like if you were on this page, is that what you're asking about?

DAVE

12:50 I think so. Yes.

JONATHAN

12:52 Or on the original like company Bill two page?

DAVE

12:56 Well, no, I'm looking in terms of the location. So, okay, let's kinda go maybe a little bit different tangent here. So we're looking at the location. So we want to create assets that are associated with the location. So in this case, it's in a... and then underneath that, I want to add the assets of the fire pump, the fire pump to the fire pump, controller, all those individual pieces.

JONATHAN

13:20 Right.

DAVE

13:21 And then if we get a call from the strata that owns the building or from a service company, can I just pull up that building, create a job or a service order, work order, whatever the term is and build it to the appropriate company for that building?

JONATHAN

13:41 Yeah. 100 percent. So that, that's what this managed job button is gonna do. It's gonna allow you to change who you Bill it to. So, you know, maybe you don't want to Bill it to, you know, top golf, maybe we build it to... I don't know who else is in here. Maybe we build it to, you know, fire services, you know, that, that's who you need to actually build this work order to at that point, you know, it would change, who the service gets built to.

DAVE

14:11 So, then going back to the very beginning of this, so again, we got a service call from a strata company. Hey, we need to come look at a building. We've never been to the building. We've never build a strata. So we want to create a job location. And then they say here's the information for the piece of equipment, we add that building with that information and then add the billing company to it. Is that what I understand we can do?

JONATHAN

14:47 Yeah. So, so in that example again, yeah, you would first, would, you know, create the billing address and then, you know, the location to service. And at that point, you know, who would bring you, to this page, whatever that, that's going to be named, maybe it's building for and that's when you come in and you start building out, those different pieces of equipment that you're gonna do work on site?

DAVE

15:13 Right. So maybe this can help a little bit. Can I share my screen for a sec?

JONATHAN

15:23 Yeah. Let me, let me stop sharing.

DAVE

15:42 Good work. Okay. So right now, I'm just showing you this is how we store the information for building right now. So up at the top here is that we have the building name, the address. And this actually is kind of a bad example… a different one. Okay. So this one same thing, building name, building address, who the site contact is phone number, who we build last year and who owns the building? This is going to be where all that other information in terms of what I was saying, like in terms of the fire on the fire on motor, the control or all that other stuff which I know I can input into your system that's not a big deal but what my issue is, so the building is 5,000 kings way is owned by WP McCarthy and company. So that is who I'd want to have as the primary customer for this location. But then we also build Collins out to this job as well. So I'm trying to figure out how that incorporates into the service trade system.

JONATHAN

16:49 Are you just looking just to keep track of that information that, you also built? Colin is out there?

DAVE

16:55 Well, I wanna be able to have all of that connected with the same building so that if we get a service call from the building owner because they're going to do like a service call, like there's a problem or a leak or something like that. But then we'll Bill call and for the annual service. So like there's kinda two different scopes of work that we do for the same building but I need to like I want to have everything is all connected so that if we go there for a service call, the technician can quickly look up the last test report. Hey, look, they already noted this at the last annual. They just need, they haven't done anything about it yet or vice versa. We're there for the annual. Hey, this is different from last year. Do we know anything about it and they can quickly look and see any service call history?

JONATHAN

17:40 Yeah. So I mean, as far as service that goes like service call history and stuff like that they can reference, you know, it would be tied to either to the building or to, the piece of equipment itself that they were out there to work on… pretty much in different of, you know, who it gets billed to.

DAVE

17:59 So if they were to do like if we assign a service ticket or a job or sorry, I don't remember the term that we're adding in here, but… it will, if we select that piece of equipment, it will tag it all together no matter who we're going.

JONATHAN

18:21 Yeah, because basically, it's gonna track the service history for that piece of equipment specifically.

DAVE

18:27 Okay.

JONATHAN

18:28 So, it's kinda like a different level, of tracking it like you, yeah, you can either look at the history for the customer that you build or you can just look at the complete service history for that piece of equipment overall. Anytime it shows up on a work order, there's gonna be, you know, a record that.

DAVE

18:49 So then going back to the assets. So if you can just do me a favor, quickly, let's go down to add an asset.

JONATHAN

19:00 So.

DAVE

19:00 So we're gonna select fire pump, just as a simple one for right now. So in here, one of the things that I noticed is that it has a whole crap load of information. Now, we're not necessarily gonna record all of this information. So we're can we modify the options in here? Or is this a standard default that this is the way that it is every time that we're adding a piece of equipment?

JONATHAN

19:27 Yeah. These, these fields are going to be standard default. They, they can't really be changed. You don't have to add all this information. You can put as much or as little in as you want.

DAVE

19:37 Right. Because that's one of the things that I noticed when I was kinda playing around with it is that it only kinda showed the information that I input it. So that's fine. So if we scroll down a little bit further, we're gonna go down to. Okay. So right here, we've got the motor manufacturing motor model and stuff like that. If we put the information in here as for the fire pump motor, because there's also a selection for a fire pump motor as an asset, will it cross reference between the two? If I do a search later on... if you...

JONATHAN

20:14 You out both individually with the same like serial number?

DAVE

20:19 So, because like right here, is there's multiple pieces that are all kind of all connected together. So in this selection is that it says fire pump, but it goes through the fire pump, the motor, the controller actually, I think I even scroll down a little bit further is that it includes like a joke pump as well?

JONATHAN

20:41 Right.

DAVE

20:42 So, but then, sorry, if you go back up to your asset selection list... not.

JONATHAN

20:48 Let me go down. I gotta go down, to cancel.

DAVE

20:52 Right.

JONATHAN

20:54 Yeah. So go ahead.

DAVE

20:55 So now, if you go to select asset type, then you go back down to firepump.

DAVE

21:05 Is that now it has the fire pump control or fire pump motor? So why would I use a fire pump controller or fire pump motor versus just the generic fire pump that encompasses everything?

JONATHAN

21:20 Again, it's just different options for how you want to set your assets up so you can build the whole thing out or you can build out individual assets. It's it's honestly, stuff like that comes down to a preference. It's just options we built in with feedback from customers doing in different ways over time.

DAVE

21:38 Okay. So then now, what would be, so if we set them up as individual items, can we select multiple items? Like if we're doing an annual service that then we would select the fire pump, the fire pump, driver, fire pump, controller, jockey, motor, jockey controller, or would it be better? Like, I guess I'm trying to figure out like what would be the advantage or disadvantage of one set versus the other?

JONATHAN

22:04 Yeah. I mean, so if you set them up to answer kind of, the first part of the question, if you set them up individually and then, you know, all you wanted to, you know, have all those services aligned at the same day and have it serviced all at once, which would probably be the best most efficient option. You can certainly put, you know, different individual services onto the same like work order for your tech to take care of with each individual component and what needs to be done.

DAVE

22:33 Right.

JONATHAN

22:33 Or, I mean, yeah, you can just build it all out underneath the fire pump and just have essentially one service on the work order for your tech, take care of?

DAVE

22:42 Right. Okay. So now, if you put, that asset in there, is there somewhere that it tells you like where it's located? Or like I'm trying to remember when I just kinda playing around with that is because that's one of the other important pieces of information to keep is how do we know, like we have notes on our form that I was showing you as to where the pump is located or who to contact when we get there, that type of stuff. So that can be added in there as well?

JONATHAN

23:10 Yeah. So like if I click on the just the fire pump as an example, yeah, you can put where located on site, obviously build out all this other information. And then if you needed to contact a certain individual prior to working on that, probably the best thing to do would just be like to note it down at the bottom of that piece of equipment.

DAVE

23:31 Right.

JONATHAN

23:31 And, I'm gonna click out here really quickly, don't have to scroll all the way up, but then tied to each building is also gonna be, you know, you can put the contact information in.

DAVE

23:43 Right.

JONATHAN

23:44 It says, hey, you need to, you need to contact Jonathan, you know, I'm gonna be on here. This isn't me, but, you know, I'm going to be on here as the contact. So, your text will have this in their app as well. So, they know they need to get a hold of me first, things like that.

DAVE

24:01 Okay. So now, okay. So let's say we're going to, we've got the fire pump added in there. We're gonna add an annual service. So how do we go through those steps and add pertinent information to that job?

JONATHAN

24:12 Okay. Yeah. So there's a couple of different ways to do that. First that I'll show you is just add again, we build out, the fire pump. We need to do an annual service. I clicked on the wrong button. We'll actually click add a new service. So then what you do is you're able to select, you know, the piece of equipment that we're going to be, you know, servicing. We'll pick the pump, you'll select the line which is going to be fire pump. And then at this point, you know, under description is where you're gonna put, you know, what exactly you want, your tech to do out there. And then down here, it's kind of where you select, you know, how often you need it, to reoccur. So we'll just have it due any time during in the month. We'll go ahead and start it this month. In October. We need it to reoccur, we'll pick annually. And at this point we'll pick, you know, for it to be, you know, every year in October, same kind of workflow for your quarterlies, except you would just change this to monthly and select for it to repeat, you know, every three months for each quarter. So you can set them up individually like that one at a time. Now, you're obviously doing a lot of the same services for a lot of your customers. So really to kinda speed it up, you can also create service templates up here, which is going to be, you know, under my account... you can kinda come in here, build them out. So these are the ones we've already built out. But if you wanted to create a new template, you just name it, you know, set it up for, the piece of equipment. Again, you'll pre fill that information, you can pre fill the line items. And once you build that out, Dave, then at that point, you can come in here, click use a template and just select it from like, your drop down menu of different templates. So we'll put, you know, we'll pick our fire pump DSL service. It's gonna pull over that description, any line items and all you would have to do at that point is select when you wanted to start and how often you wanted it to repeat. So again, different ways to do it, the templates is going to be the fastest way for, those same services you're doing across your whole, you know, customer base.

DAVE

26:30 Right. Okay. So then... if we have, I mean this is kind of a good one here. So on a deal service is that we have, a mechanic that does the annual services? Can we enter somewhere in there the parts that we need for the engine service? Like, I mean, that's kinda part of the, I guess quoting side of things a little bit. But if we go there and we use, the fuel filter and oil filter, can we add that as an item into there and so that we know what we need next year?

JONATHAN

27:04 Yeah, absolutely. So right here is where you would kinda do that. So we just have, our labor and our, you know, inspection charges here. But if you wanted, to do, you know, put your filters in here. You know, you'll know maybe you need five of them and whatever else. You can certainly build all that out. So whenever, you know, select the service in and create that work where all these will be carried over.

DAVE

27:29 So, okay. But if it's going to be a specific item, like is there a way that we can specify what filters for that piece of equipment?

JONATHAN

27:38 Yeah. So that's part of something like when you build your items out, you would just, you know, make a more detailed description, of the type of filter or the size. We, we might have something else. So like right here where you would put the size in. Now, all that being said is also underneath like the asset itself.

JONATHAN

28:03 You know, you're gonna be able, to make note of that. I think there's filters in here. Somewhere. Let me try. Let me try to just.

DAVE

28:11 I have to go under probably under nine or something like that would be my suspicion.

JONATHAN

28:16 Yeah. So whenever you're building out the asset, you can also... do, I've got the pump up there. But essentially, yeah, I mean the answer is, yes, you can definitely, you know, put line items that are going to be specific in size for what your tech needs to actually take out there, put on his truck and make sure he's got on site.

DAVE

28:40 Right. So whoever is building that would have to know what filtered like again where we have kind of a separate database that we use so that when we do a service, we keep track of what filters we use this year so that next year we know which one it is. So that's just kind of why I was hoping that we can have something built into that as well to keep track of that.

JONATHAN

29:01 Yeah. So you would just build the service out once like you're gonna do, the same filters each time. And so, you know, anytime you go to actually create that job... you know, we'll select this. We'll just again, we'll just do like a service call and then we'll create the job, right? And at that point, excuse me, the work word is gonna pull up. I didn't save the filters. So let me go back.

JONATHAN

29:45 I didn't pick the, I didn't pick the right item. So I need to do the pump. Yeah. So you would just create a job, where is the pump... that's not the right pump? I think I did this one... that the one I did Dave?

DAVE

30:00 I'm sorry, you're moving a little quicker than I'm paying attention to what's going on?

JONATHAN

30:05 Yeah, I've got, I.

DAVE

30:07 I don't know. I'm not sure.

JONATHAN

30:09 Which when I put the filters on for the service, but I think it was that top one. Yeah. So once you create that service and add those items that, you know, hey, we're gonna need this every time we go out there to do that service, those line items are gonna carry over, with the filter size per the description, you know, you've set up. So you're not going to have to reference it each time because as long as you know, the pump itself doesn't change, obviously, the filters are gonna stay the same.

DAVE

30:37 Okay.

JONATHAN

30:40 And then, of course, you know... you can update, you know, kinda, the cost of your items as maybe your suppliers, are changing them, you can do them one off. You can also just update your items as a whole in service trade. So each time, you kinda set this work order up, your most recent costs are going to be associated with the work order.

DAVE

31:05 Okay. So then now, how do we move that over into the calendar? Like how do we schedule that?

JONATHAN

31:12 Yeah, good question. So you can either schedule it straight from, the work order. You know, you can click here, pick the date and time, if you know that information as well and then throw the right technician on there or, if you're not sure who exactly who's going to be out there, you can just pick... pull up, your calendar for your scheduling. And basically, it's just gonna show, you know, based on your filters, what jobs you have, where and to schedule it, you know, you would just click on the pin, pick the date that you needed your tech on the job. And then you would just, you know, click on the little person icon and assign the technician at that point. You know, it's gonna sign that work order, that tech and put it on, his app for whatever date we selected it. So.

DAVE

32:08 We do it by like a calendar view or does it have to be a?

JONATHAN

32:14 It's gonna be a map view. So we do have a calendar view being developed and it'll come out some time. I think in the next like six to eight months was the most recent time line. But as of today, it's gonna be a map view with just like a, you know, a weekly view at the bottom. But, you know, monthly kind of something we're working on right now?

--- Next Steps ---

DAVE

32:41 Okay. So then like if we get a phone call today job is to be scheduled three months out. Can we like, can we schedule a date but not a technician?

JONATHAN

32:57 Yeah. So let me back on that work order. You can... like say, we need to be out there December eighteenth. We can schedule it, schedule that job, but not a technician.

JONATHAN

33:16 And then once that date comes up, you know, like on your dashboard, let me change. Let me go to December eighteenth. Specifically. It's gonna come up that this is on your schedule, but it's not gonna have a tech assigned to it. So you would know like that, it's blank and we need to, we need to assign an individual.

DAVE

33:35 So, okay. And then how do we see like that day? Like we have to go to that map view and then just have a little bar underneath is what, like how do we see how full the day is?

JONATHAN

33:52 Yeah. So exactly. I mean, you would have all your technicians with their jobs, you know, stacked underneath the day.

DAVE

34:02 Tell you how long they're scheduled for?

JONATHAN

34:05 No, that view doesn't but there is, we have a dispatch board which is a different view to kinda see that. Again, these would be all your technicians and you would be able to see like who's got time blocks, where, and, what their availability is throughout the day, if they had any gaps in their day that needed to be filled. So like you can see like, you know, these jobs, are supposed to be an hour block. I've got them overlapping but, you know, we've got Logan down here. He's going to be at the gossip grow from eight to about 12 30. And then, you know, like that, he's got availability beyond that.

--- *Next Steps ends* ---

DAVE

34:45 Okay.

JONATHAN

34:45 There's different views if you wanted to kinda see that.

DAVE

34:51 Okay.

DAVE

34:57 And then, so from here, if the job gets done.

DAVE

35:08 How do we Bible that out? I guess I'm gonna kinda quickly bypass the technician step at this point.

JONATHAN

35:14 Okay. Yeah. So, okay. Yeah. So back on the workforce, this is perfect. So say, the job is done. I mean, just for the sake of it, I have to kinda market as completed so we can build it. This is just gonna be when your technician completes the job in the field and marks it as done at that point. What you all would do... you know, we're gonna put it on your dashboard in your bucket letting you know that this job is done in the field, but it needs to be reviewed and build. You're. Gonna come in here, you know, make sure all the parts, are accounted for and everything's accurate, right? All you would do is you would click complete job and then I'll go ahead and complete it and create the invoice. And the first screen that's gonna come up is this one, this is just gonna allow you to, you know, deselect items if you needed to do partial or split billing for any reason. And then we'll actually just create the invoice. And at, you know, server trade is gonna create the invoice from here and you can, you know, send it straight to your customer. But essentially, you know, it, it's that simple just to click, you know, complete job and create invoice.

DAVE

36:32 Okay. And then we can modify pricing or whatever before we send it.

JONATHAN

36:38 Yeah. So, this is just the invoice. Obviously, we haven't sent it to our customers. So again, you would just click the pencil, adjust your pricing, add. Any items, you know, stuff like that. You can change how it gets displayed if you wanted to show line items or just a grand total. You have the ability, to change all that.

DAVE

36:59 Okay. And then can we, like, can I see what that invoice looks like right now?

JONATHAN

37:04 Yeah. So what it's gonna look like, is this, so... this is going to be, your logo? It'll have your terms and conditions. It'll have the pricing displayed however, you know, need to do the pricing. And then, you know, this pay now button actually isn't available in Canada. So you wouldn't have that, but, you know, everything else would be there. Service details is gonna be, you know, kinda the post job report showing, you know, anything you all did with, you know, attached paperwork, pictures, things like that.

DAVE

37:42 And that's a link as a customer? Yes?

JONATHAN

37:45 This is a link that the customer gets. We'll include it on our invoice, but you can also send it separately if like you didn't want to invoice through service trade, but you wanted to just, you know, send your post job reports. It can be sent separately. Yeah.

DAVE

38:01 Okay. So that's one one or the other because for, in terms of accounting, is that we're going to be using Sage, so we can invoice through service trade. So how does that work as well? So I guess we would have to print off a copy of that invoice. So that I guess entered manually here.

JONATHAN

38:25 Yeah. So I mean, generally, yeah, you would have to... you know, re, key this information into Sage. You know, we also, we do offer at the end of the day, we do offer an integration with Sage, but it's probably not the best place to start because it is a little bit, it's a little bit pricey especially to get set up initially but, you know, it's something that people with Sage tend to get into like second year with service trade, something like that after they've gotten used to all of the other.

DAVE

39:01 Yeah. What we're talking about at this moment in time. So, okay. So from here, like, what does it look like when you go to print the invoice? I guess it looks like that. Does it show what it looks like if you just to print the invoice?

JONATHAN

39:17 I really don't know. I'll just click print and kinda see what the yes. So it's just gonna look exactly like this.

DAVE

39:25 Okay.

JONATHAN

39:26 And then, that just is based on how you want to display the invoice. So like, you know, for example, I've just got the grand total, but if we wanted to break it down by line items, then at that point, you know, the invoice is going to... it's gonna have that breakdown because it's gonna then include, you know, the items. So, you know, the person rekeying it can make sure that they put, you know, the correct filter size and things like that?

DAVE

39:53 Right. Okay. Now, how about if it is, a custom order piece, let's say we're ordering, a new controller that's specific for that item. How do we tag that into the service trade? So actually let's back up a little bit further. I'm not gonna go down this road completely, but we figure out how to do the quoting system through service trade.

JONATHAN

40:20 Hum...

DAVE

40:21 Can we create a purchase order within service trade and send that direct to our customer or to the supplier?

JONATHAN

40:31 Yes, and no, not everything that we've looked at, but we do have like an add on called partsledger, where, you know, those type of capabilities, are possible, absolutely.

DAVE

40:42 Okay. Now, when you say that is an add on, like what type of price to, are we talking about?

JONATHAN

40:48 Wow. I don't even I'm not even sure, maybe like 10 to 10 K, something like that, but I'm not positive Dave to be honest with.

DAVE

40:56 Yeah. Okay. No, fair enough. So then, how would we incorporate special item pricing? Like is that just something that we would kinda have to build in there as an item? Okay?

JONATHAN

41:10 Yeah. So, you can, you know, you can build it in right here. You can just add it to your invoice or, you know, you can actually let me where's my account at or you can just go into items. I actually don't want to leave here. Let me open up a new tab... and you can just, you know, create the item from here that way even though it's more or less a one off. If you're using it in half 12 times a year, you could actually just go ahead and create it and have it in your standard item list moving forward.

DAVE

41:41 So, sorry, what does that specific company mean?

JONATHAN

41:46 That's a great question. I don't know maybe if you're just, you know, using certain items or certain pricing that you pass off to certain accounts, you just want to, you can note that, in service trade.

DAVE

41:58 Okay.

JONATHAN

42:00 The only thing that's really, you know, required are gonna be the description and, the type, of material.

DAVE

42:07 Great. Okay.

JONATHAN

42:11 So, yeah, you can either just do one off items. Let me close some of this stuff out on the invoice, or just put it in your items list so you can reference it even if, you know, you're only using it a handful of times a year.

--- Pricing ---

DAVE

42:27 Okay.

DAVE

42:33 Okay. And then when we go back to like the conversation of our onboarding and stuff like, that 3,500 dollar quote that or quarter price that you gave me that, that's a set price or how does, that work?

JONATHAN

42:51 Well, that, yeah. So that's a set price for like, the 90 days worth of onboarding. Like if you want an additional like 30 days, you know, there, there's a different fee for that, but nobody typically takes more than 90 days. Most people get through it and actually less than that.

DAVE

43:11 And then... what is included in that service? We talked about like adding our customers from like our Sage account.

JONATHAN

43:23 Yeah. So.

DAVE

43:25 What else would be included in that?

JONATHAN

43:28 Yup. So beyond that, obviously, we set up your customers contact information, address and stuff like that. And then it's gonna include, you know, the 90 days worth, of training for anybody using it, texting and office staff. A lot of it's gonna be... you know, online based self paced learning modules. And then there's also like a once a week meeting for 30 minutes where whoever is like the point of contact for your onboarding within your company, would actually meet with your project manager for your onboarding just to make sure everybody's tracking and that any questions that do come up during onboarding can get addressed on our end. So at the end of those 90 days, everybody's you know, ready to roll and more than comfortable with service trade plus ongoing support. So you'll have a single point of contact, your account manager, once you're out of onboarding, that you can reach out to.

DAVE

44:29 Okay. And then for that point of contact, like our project manager at service trade, is that always going to be the same person that we're dealing with?

JONATHAN

44:39 Yeah, most of the time, I mean, we do have a pretty low like turnover on that team. People do get promoted into like different roles, but, you know, you'll be made a well aware of any changes like that, but it's definitely not gonna like change monthly or anything like that different two years from now, but.

DAVE

44:58 Right, right. I'm sorry, one other question that I had as well. So some of our forms right now is that we're going to be doing it in excel. How do we import that as a PDF into the service records?

JONATHAN

45:13 Okay. So, there's two different ways, right? So you can either, you know, give us, those reports and we can do it for you during onboarding. It's 149 dollars per page or if you have access to Adobe acrobat pro, we have a step by step guideline on how to do it, you know, yourself and it's pretty simple. I always tell people. I think I could even do it.

DAVE

45:45 Which we're gonna go down that road that's the plan.

--- *Pricing ends* ---

DAVE

45:49 But for right now, I know one of the forms will not convert quickly and just in terms of getting the process going as I'm still gonna use the excel version of that form is gonna stand alone we.

JONATHAN

46:03 I...

DAVE

46:03 Save it as a PDF, but I want to attach it into the service record for like an annual fire pump test.

JONATHAN

46:10 Yup. So.

DAVE

46:11 How do I import that into, the service ticket?

JONATHAN

46:16 Yup. So back, on the job, what you would wanna do is you could just, you would come down to attachments. I mean, you're gonna save it as a PDF. So it's going to be on your hard job anyhow and you would just add the attachment. So, you know, you just have to name it and just choose the file and upload it from your computer at that point and it's gonna save it to the work order, which then, you can, you know, obviously reference, you know, underneath the, you know, wherever that work order is being housed, whichever customer account is being housed under.

DAVE

46:48 Right.

JONATHAN

46:49 So you can do it there, attach it straight to the work order or you can attach it underneath the actual property that it was done at, you can put attachments there.

DAVE

46:59 Right. I mean, in this particular one is that it would, I think it would be best suited to go to, the service ticket.

JONATHAN

47:06 Okay.

DAVE

47:06 Yeah. Like again, whether we're doing a fire pump test, we're doing the flow curve for, the annual inspection or if we're doing a hydro test, is I just need to be able to add that so that it gets tagged so that when we send the invoice out, they get a copy of that as well.

JONATHAN

47:23 Yup. And that's exactly how you would do it, you would.

DAVE

47:26 Just...

JONATHAN

47:27 Attach it, to the bottom of the work order at that point. It would put it... on that after job report that we looked at earlier and you can send it all to your customer from there.

DAVE

47:36 Right. And then also, sorry, going back to the asset list is that if we go in there is that we can add like an iom or something like that or pictures directly associated with that asset as well. And that's only viewable internally.

JONATHAN

47:54 That's yeah, it's not going to be viewable to, your customer. You could, you could look at it, your text could look at?

--- *Next Steps* ---

DAVE

47:59 Right. Okay. Yes. Okay. And is there a storage limit as well?

JONATHAN

48:09 No, sir.

DAVE

48:14 Okay. Let me mole is over for a few days and then we can talk next week.

JONATHAN

48:20 Yeah, works.

DAVE

48:21 Monday.

JONATHAN

48:22 What's that?

DAVE

48:23 Are you off on Monday?

JONATHAN

48:25 I'm not, I'm working on next week, the following week, the week of the sixteenth. I'm actually out on vacation, but next week I'm available.

DAVE

48:34 Okay. Well, let's touch base maybe Wednesday if that works with you?

JONATHAN

48:38 Yeah, I'll call you on the eleventh. What's what's the best time to maybe catch up?

DAVE

48:45 Probably is going to be better kind of around the same time as now?

JONATHAN

48:49 Okay. I'll plan on doing that. You know, as I always tell you anything that comes up before then just let me know and I can get you some resources, but was this helpful for you?

--- *Next Steps ends* ---

DAVE

48:59 It is, was, however you want to phrase that. As I said, it's just, I think until we kinda start getting into it is, as I said, my big challenges is how are we... getting everything organized so that it semi matches what we currently have just in terms of ease of transition. That's going to be a big thing and that's gonna take a little bit of time to kinda play around with. And, and also in terms of changing up like because I said we'll have to do a couple of external forms versus internal forms and move things over. So I will that's going to be my biggest challenge, on the whole scheme of things is trying to figure out how to convert from how we are doing it to work within the platform and get the same or better results at the end of the day.

JONATHAN

49:53 Yeah. Absolutely. I mean, that's always kinda kind of the value you have to, you have to weigh against. Are you, still, are you still evaluating any other products at this point?

DAVE

50:01 I am, I have to be 100 percent honest on that. I'm not 100 percent convinced on any of them. It's just going to be kind of what's going to be the easiest way. Like one of the ones... I believe a ServiceFusion is that it left me create purchase orders to the suppliers within the platform. And kinda, the general concept I get of that is that there's going to be more initial setup time because like with service, they got the premade platforms and everything like that in terms of what information to record, whereas ServiceFusion, you have to build everything literally from the ground up. So there's definitely pros and cons both ways. I also looked at... sorry, there's two other ones that I was looking at BuildOps and... I can't even remember the other one. But that one, it would have been nice but it just, it wasn't financially viable. There was sorry.

JONATHAN

51:07 BuildOps?

DAVE

51:08 No, it was... crap. I don't remember the other name.

JONATHAN

51:15 Yeah.

DAVE

51:16 It was a Canadian company which was a little bit nice just because the, everything was all done within the Canadian rules if you want to call it that. But at the end of the day, it doesn't really matter. I mean, both systems. All systems are set up to work with both in us and Canada. So... it's just that the features are all going to be the same. It's not like that one where you could say that pay online. We can't do that. Even still, I don't think we'd be able to do it because we won't have Quickbooks incorporated.

JONATHAN

51:47 Right. Okay. Yeah.

DAVE

51:50 But as it's not end of the world, in any aspect. So I just have to kinda way out which is going to be the better system, yeah.

JONATHAN

52:02 No, I understand that well... you know, let me know what I can do to kinda help you figure...

DAVE

52:09 That.

JONATHAN

52:09 Out at least service trade wise. And I guess at the end of the day, what we can do here, I can do to earn your business. You know, you're checking them all out, but I think you realize ServiceTrade is probably the one most tailored towards fire protection, in your business, but, you know, I kinda.

DAVE

52:27 Yeah, I'm definitely gonna say, I mean, there's several advantages. As I said, it's just kinda playing with the platform that's going to be one of those things that is definitely going to be a big challenge because you kinda have to be all in before you can really make a decision, but it's just a lot of time and potentially money that gets invested. If there's anything you find out, it doesn't work out.

JONATHAN

52:48 Yeah. So, and that, and that's why we take kind of a longer onboarding stances. We know it's a lot and we wanna make sure, that we kinda, you know, are there along the way to make sure that any wrinkles, are taken care of prior, to your going live as we call it.

DAVE

53:09 Yeah. Okay. Well, let me think about this. We'll touch base on Wednesday next week and reconvene?

JONATHAN

53:17 All right, Dave. I appreciate your time. Look forward to catching up with you next week.

DAVE

53:21 Sounds good. Thanks.

JONATHAN

53:23 Bye.

DAVE

53:24 Bye bye.

The End