



# RuffRauth Game Plan

Chris Kidwell

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## Participants

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### **OTHER**

Kurt's iPhone

Vkugel

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# Transcript

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

DANIEL

0:00 Good afternoon.

CHRIS

0:01 Hey, Vince. I Daniel.

VKUGEL

0:03 Good afternoon, Chris?

CHRIS

0:05 How are you?

VKUGEL

0:06 Good. Thanks. Good.

CHRIS

0:08 Okay, good. Let's give it a couple more minutes. Let's let everybody get here.

VKUGEL

0:12 Okay.

CHRIS

0:33 Just waiting for Brian and James.

CHRIS

0:53 I think, I hope.

CHRIS

1:12 Comes billing.

BILLY

1:24 Hey, guys.

VKUGEL

1:26 Hi, Billy. How?

BILLY

1:27 Is everybody?

VKUGEL

1:28 Good.

DANIEL

1:31 I'm doing well. How about you?

DANIEL

1:38 Just...

CHRIS

1:38 Wait for Brian and James.

BILLY

1:53 I know Jamie, did you say Jamie?

CHRIS

1:55 James?

BRIAN

1:56 Yeah.

BILLY

1:59 Here, I saw him earlier.

CHRIS

2:03 He accepted. Yeah, Brian.

BILLY

2:07 They'll be here. Give him a minute.

BILLY

2:17 What else was rough looking at anything?

CHRIS

2:21 I mean, no... who knows? I mean, I still think they're trying to do the BuildOps thing. You know, I will go back to... the comment or the statement of.

CHRIS

2:42 The version of coins that they were on that they are on is sunsetting it's going by. They're making the migration to intact and trying to do intact and build apps. They still want these reports. The hard part or the argue men that I think that we have is those reports are gone. You're not going to be able to get them anymore because intact can't do it and BuildOps can't do it so I can't win the argument or I have not been able to transition their point of view of like, hey, then we, we're on the new island and the boats are burnt, right? We can't go backwards now, so they still think that they can go get those reports somehow, which I don't think they can. So, phase two or the next step of the argument that I'm trying to win is, you know, hey, at least we have better contract reporting than what you're currently doing now with BuildOps?

VKUGEL

3:34 They just bought BuildOps didn't they...

CHRIS

3:36 About a year ago.

VKUGEL

3:37 Yeah, it's going to be hard to displace them.

CHRIS

3:42 Well, they're not live. They've lost complete faith in the product. They have no finish line insight in terms of getting live and they're preparing for litigation against BuildOps.

VKUGEL

3:52 So, they're not using BuildOps? They're still using their coins. Have you mentioned doing a demo with Northboundary?

BILLY

4:01 Yes, I...

BRIAN

4:04 Here?

VKUGEL

4:05 Okay.

CHRIS

4:06 This is my.

VKUGEL

4:08 What did they say...

CHRIS

4:11 So, I sent him the videos that we had in high spot. So, I sent him the videos that we have in high spot... Kurt dialing in.

VKUGEL

4:25 Is my opinion when you want someone to really buy something? You should just have them get a real demo. Yeah.

--- *Purchase decision* ---

CHRIS

4:32 I agree... to you to the point I think you were making earlier, I was still trying to vet out if they were, if they're actually shopping, if this is real or if they're just trying to kick tires or if BuildOps was basically saying, well, go figure how service trade doesn't we'll just mirror what they do.

--- *Purchase decision ends* ---

CHRIS

4:48 So somewhat, you know, somewhat hesitant to entertain serious conversations until I finally got out of David that, you know, basically finally said full transparency, Chris. We're preparing for litigation and I'm like, okay, different conversation now.

VKUGEL

5:05 So, I think, you know, Northboundary, they can run without service trade or BuildOps. I think it there's a big advantage to get Northboundary in there. So we know people in their Construction division, one of their senior vice presidents is a friend of mine... and then they belong to the synergy group. And a lot of the people in synergy use Northboundary. So I, you know, there's people that I can have talked to Dave. We just have to have a pretty clear picture, but I think one of the main objectives would be to... have them get a demo from me on Northboundary because I can talk to the reports. Those are standard, you know... coins reports.

BILLY

5:55 Yeah. And that was my message to events as I was like... number... one one of the reports they want is G... how are we doing on this maintenance contract relative to what our anticipated margin was? Based upon what we proposed. Well, first, you gotta know what you proposed, do you know what you proposed? Well, I'm not sure. Well, Northboundary does, Northboundary knows what you should expect on this thing. So that's number one Northboundary?

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

VKUGEL

6:28 That's right? Yeah.

BILLY

6:30 Boundary is the project budget that's number one and this contract budget. So we've got a budget based upon what the customer signed that's number one, number two. Do you know what you spent on this thing now? We know that, right, right, Daniel knows how to run the report when they run their jobs against the contract. We can say here's, all the cost you've ever had against this contract. And if they invoice against that contract, we can say here all the invoices you ever had against that contract here's. How you're doing the one thing we can't do events that I don't know that they're asking and maybe you'll know is... hey, we're in year two, we did find in year one, copper just went up 70 percent.

--- Pricing ---

BILLY

7:19 How am I gonna do this year when copper is up 70 percent?

VKUGEL

7:23 Yeah, I don't think that's they might say that, but I don't think that's really issue because they don't use copper on maintenance contracts. We even a win up.

--- Pricing ends ---

BILLY

7:34 Cotton copper. Yeah.

VKUGEL

7:36 It's it's air filters.

BILLY

7:38 What? Yeah. What?

VKUGEL

7:40 Filters and bounce, that's the primary things. Yeah.

BILLY

7:45 Whatever I don't know free on.

VKUGEL

7:46 Okay.

BILLY

7:48 Anyway, the point being I said outside of that little anomaly, we should be able to do exactly what they want to do. And Chris, you're supposed to go get the reports verbatim that they're using now for last year, they represent what they want, right?

VKUGEL

8:06 They did send one collection of reports maybe not the.

BILLY

8:10 There it is.

VKUGEL

8:11 Today. Okay?

BILLY

8:17 All right. And so... well, it's ugly, but looks like it was run on a dot matrix printer.

VKUGEL

8:27 Yeah, that's probably what they use. I think they have a OS version of coins.

BILLY

8:36 Okay. So, I'm guessing that left is a revenue?

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

VKUGEL

8:40 Contract amount, what it contract name, contract amount bump. So they do have an invoicing schedule. So, whether that's run off the invoicing schedule, what the budget was, margin, dollar, margin percent, billing margin?

BILLY

8:57 Billing like what they actually Bill? Yeah. So it looks like they're getting on this thing 33 point four percent margin on an expected margin of 55 point two... maybe.

--- *Pricing* ---

VKUGEL

9:14 Yeah, they had an expected margin. Well, on the one 33 point four of, yeah, amount, gross margin percent, yep, 55 point two. And they got 33 point four.

BILLY

9:27 Well, the, but the other thing I would point out is that you thought you were going to get was 1,700 times four in revenue, 40 plus 28, 68. And somehow you only figured out how to show up for roughly 4,000. So, you out to be complaining about the 2,800 in revenue? You did not get... something like that?

VKUGEL



9:51 Yeah. Well, greement performance reporting is a big deal for people like that, and they know if they are performing too well, they're not doing their maintenance.

--- Pricing ends ---

VKUGEL

10:01 And so they look at them either way. Am I over or am I under? And they have different, you know, action they take on that information.

BILLY

10:12 Okay. I don't know where... let me call Brian.

VKUGEL

10:18 And, and so, like I say, I think it would give him if he use Northboundary that's gonna give him a lot of information. And I think that's really gonna put us in a lot better position.

BILLY

10:34 Yeah, no doubt.

VKUGEL

10:37 And we do have the initial bridge built for it's already implemented to push the customer, the location, all the inventory, all the assets over to ServiceTrade.

BILLY

10:49 Yup. So here's the thing that you gotta fight through then says that they don't believe anymore unless they can see it because build up sold them a pig and a post. Are you on join this call?

BILLY

11:10 Okay. Thanks. All right. Bye. All right. Here comes Brian. Let me get James.

BILLY

11:22 Yeah.

CHRIS

11:22 So that's somewhat of the hard part Vince that we have is... and Dave will admit it that he bought build outs because they had a fancy project management reporting tool. It unfortunately can't handle their maintenance and their.

BILLY

11:39 Rat call. Bye. Yeah. Yeah, he's coming.

VKUGEL

11:46 Yeah. And that's what I hear about BuildOps.

--- *Type of work* ---

VKUGEL

11:49 They're not very good on the maintenance side. They're focused on projects. I have another customer... that Jackson mechanical. I think they may have had a service trade and went over to BuildOps and they then they said the BuildOps is pretty weak in the maintenance side.

CHRIS

12:10 Yeah. They might be coming back.

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

VKUGEL

12:13 I don't know about that part.

CHRIS

12:17 You're probably right. But we'll see.

VKUGEL

12:18 Well, if, you know Ryan, do you know those guys... that Ryan owns those eight or so contractors and USA mechanical says Ryan says go to BuildOps.

CHRIS

12:34 You say mechanicals been force fed that for three years and haven't gotten off service trade yet though?

VKUGEL

12:40 Yeah. Well, I talked to them last week. I was doing some training with them and I always try to convince them look, you know, that doesn't have good service. They said, yeah, Jackson mechanical has been telling us the service module is not very good. They moved over a year or so ago and so I work on them. We'll see if they switch or not. But they said they're getting a directive from... Ryan.

CHRIS

13:06 Yeah, I believe Ryan's invested in BuildOps.

BILLY

13:09 Yeah. You know what? That's starting to sound right?

VKUGEL

13:12 Yeah, we...

CHRIS

13:14 Yeah. So.

VKUGEL

13:15 That's okay. We'll kill them with, you know, by having Northboundary and service trade and integration. We'll smoke those guys and then they'll all come back eventual.

CHRIS

13:26 Helios is a part of or an Billy who helios that contract you put together for me on Friday?

BILLY

13:32 Yeah. Yeah. I thought that was just for Ryan... itself, but that was for that group.

CHRIS

13:41 Yeah, anyway.

BILLY

13:43 We got the whole group here.

CHRIS

13:45 Side track. So let's get back on track so we can get this conversation over with. So... hey, I put notes in the calendar invite guys as well as the PDF. So I can share my screen if you want. I think we have a way to get what the rough is looking for... based off of Northboundary events. You can kind of elaborate. What I want to get is the story... if I get Dave back on the phone, Dave Sloan from rough raf back on the phone on how we can show them this.

VKUGEL

14:19 The only thing I would do is Dave, can you... sit in on a demo with Northboundary? And if that happens, then everything will be revealed to him, then we'll know one way or another what his opinion is, but we have a lot of the components that he's looking for and we come from that background.

BILLY

14:45 That's right?

VKUGEL

14:46 And we know a lot of the same people. So if someone would set up the demo, then we would be that much closer.

BILLY

14:57 The other thing we need to be able to do... Brian James and Daniel... is we need to show them for a contract in that contract.

--- *Recurring maintenance* ---

BILLY

15:09 The only thing they're billing is maintenance as all their billing and that's all the jobs you know, are running under that. And we need to show it two ways. We need to show where they're billing the invoices as recurring invoices that are fixed costs that come out of our recurring invoice capability.

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

BILLY

15:26 And we need to show it the other way where they're building each voice for the one that they're for the job that they're doing. And in the case where the invoices don't actually have a job would cost, we need to show how the jobs show up with all the cost that went into that job and how they, for every contract, they can measure the gross margin in summary and in detail summary should probably be on the contracts page and detail should be inside of the report. Does that make sense? You?

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

BRIAN

16:00 Yeah. With a goal for the detail of camping this report that we got on the screen here now?

BILLY

16:06 I wouldn't necessarily have it look just like this because this is as ugly as it gets... familiar.

BRIAN

16:17 Ugly but familiar. But yeah.

VKUGEL

16:19 They, they sent over earlier, Chris probably provided three or four different reports that they were looking for.

--- *Pricing* ---

BRIAN

16:30 Yeah.

BILLY

16:30 Do we know what the...

BRIAN

16:31 Individual lines on this, are they sent, we actually got copies of some of their reports about a year ago and I sent Chris back some notes on, hey, let's try to get clarification on some of the stuff. One of the things was what this number is like 1,817 1,615. What are they? Do? We know?

VKUGEL

16:48 When you say 1,615 10?

BRIAN

16:51 So, on the left side of the screen under numb, which is the second column there. Yeah, that stuff. Do we know what those numbers are? They're clearly individual rows of something... do we know?

VKUGEL

17:01 Renew number, contract type customer?

BILLY

17:05 In a... contract number 18, billable amount, 1,678, I mean, but I could be wrong.

VKUGEL

17:14 Yeah.

BRIAN

17:15 Seem, right?

VKUGEL

17:16 Well, repeats, 18, 17, 16, 15, 18, 17, 16, 15, 1,413. So, yeah, we'd have to check with them on that part.

BRIAN

17:27 If nobody knows, and it's clearly not super important here would be obvious to somebody.

VKUGEL

17:31 I would.

DANIEL

17:32 Have a contract renewal. So those are the individual renewal instances of probably the same contract all the way up and down.

--- Pricing ends ---

BRIAN

17:39 Yeah, I guess.

BILLY

17:44 Well, I'm not sure we need to be that explicit, right? In there thing. I think we just need to vent this point, say guys here's the way you should run your business and we show them Northboundary, and then we show them service trade and we show them the data in service trade that leads to them understanding on a month by month basis for a given or quarterly basis for a given contract, what their summary and detailed gross margin is, that's what they want.

VKUGEL

18:16 Yeah. So, I think at a minimum, we should be able to sell them Northboundary. And I think, you know, we'd really like to sell them both of them. But at least if we get Northboundary in place, that... reminds them every day they need service trade on the other side of.

BILLY

18:35 Yup. And I think Vince is correct and leading with Northboundary because he's got so much, very explicit stuff that I guarantee you the BuildOps guys haven't even come close to yet with regard to costing out maintenance contracts and proposing them. They've got none of that.

VKUGEL

18:53 That's right? Because I have several other companies that have BuildOps, but they, there's nothing, BuildOps offers them that competes against Northboundary. So, you know, they need Northboundary.

BILLY

19:08 Chris, what was, did they never even get Northboundary off the ground for any of their projects stuff either?

CHRIS

19:15 Build apps, you mean?

BILLY

19:16 Yeah, I do correct. Well, then you also need to show them project quoting and explain how that's going to lead to projects being initiated in service trade based upon a win.

--- Purchase decision ---

VKUGEL

19:32 Okay. Yeah. So... yeah, I think if we did it, we're able to do a demo and Chris, if you can't talk to them, I can work my resources to set up a demo.

CHRIS

19:48 Dave said he's happy to take a call as long as we can handle the reporting functionality.

--- Purchase decision ends ---

CHRIS

19:51 So... that's kinda where I'm stuck at, right? I don't want to waste anybody's time. If we can't handle the reports he needs.

VKUGEL

19:59 Well, it's not a waste of time.

BILLY

20:02 So, so, so Daniel, I don't know if it's you or if it's James, I don't know who's gonna get the summary, the example data in the account but, and I can put another resource on it in terms of, you know, osela or somebody else or James, you can have one of your resources, get enough jobs in the system under a maintenance contract, right?

--- Accounting ---

BILLY

20:27 Ideally with a third party ID that's tied over to Northboundary, so it indicates that it came from Northboundary, and that we get the items on the jobs correctly, that we get the cost on the items correctly, that we get the invoices done correctly, and that Daniel can generate a report. How do I get from here to there?

--- Accounting ends ---

VKUGEL

20:48 Yeah. I don't think we need to do all of that yet. I think it's gonna take a full session to go through Northboundary and just see how it all flows. And then in the end push everything over to service trade. So there it is, and then we can build reports on all this stuff.

BILLY

21:05 Yeah. But then I'm not gonna take the chance with them having been burnt. I don't think it has to correlate with one that was exactly created in Northboundary, but I'm not going to take the chance that they say, yeah, we were told and we were told that the other thing would just do it. Trust me, we're not gonna, we're not gonna do any, trust me with these guys. What we're gonna do is we're going to have Daniel show them the exact report that we're talking about, that has the data in it, whether it's arranged exactly the way they want it, but has the data in it?

CHRIS

21:38 That they're looking for.

BILLY

21:39 And we'll show them the data on the screen in service trade and then we'll show them the data in the report.

BRIAN

21:45 A question, is there a demo... in Northboundary that we like that looks kinda like you're looking for Billy here's. Why I'm asking, is they ask, is let's go set up a contract and some stuff underneath it, so that a good report comes out in service trade with somebody's. Got to go build that. Why don't we just build it based off of a maintenance contract in Northboundary demo that we already like. So then back over to the.

BILLY

22:09 So, so... the, so so that the line items look identical? Yeah.

BRIAN

22:15 Yeah, like why not? You know, the numbers don't have to all line up perfectly, but at least if it looks sort a ballpark familiar, then that supports the, that supports the demo.

--- *Recurring maintenance* ---

BRIAN

22:25 So that's when you're doing a sales demo and forget me because I think you've done this for me before. I just don't remember when you do a sales demo usually, do you have like a already cooked up, you know, example of a maintenance contract that would have some stuff underneath it, you know, individual assets, you know, services and so forth.

--- *Recurring maintenance ends* ---

BRIAN

22:46 And we could just use pick and choose the pieces off of that, the frequencies, the asset details, the prices and hours of labor, and so forth to set up the corresponding data over in service rate. Kinda like if the integration of all the stuff already existed that's what we'd end up with. Yeah, we're just gonna have it by hand.

--- *Customer engagement* ---

VKUGEL

23:03 So we can, so first we can push all the assets to service trade today. Beyond that. What are you looking for? Like the agreement information?

BRIAN



23:15 Just kinda all the line item level detail. But the goal here is if we're gonna give them like a seamless experience or seamless feeling experience.

--- Customer engagement ends ---

BRIAN

23:22 The goal here is I quoted, you know, this, that and the other maintenance on this equipment, this other equipment, this other equipment, they're gonna occur on these frequencies with these hours of labor and these parts involved and so forth. If I can see a good like a realistic example of that in Northboundary, then we can, you know, key all that corresponding stuff in the service rate. And then from that point, it's straightforward to build a report off of it. But we want to get the data in first. So rather than us just make something up and have it look fake and bad, let's just use something that you.

BILLY

23:57 This data because we know that it looks good. Yeah, I like it.

--- Recurring maintenance ---

DANIEL

24:02 Is there some entity type of that demo is all umbrellaed up to like the same singular contract or singular have any one thing? Yeah, we...

BRIAN

24:12 One of the demo accounts like sticking in demo. So we don't care just one that's hooked up the data warehouse so you can build reports on it, right? And then, yeah, since it's all scoped under one contract, it doesn't matter if there's noisy data elsewhere in that account, one contract anyway.

BILLY

24:27 Let's take vents, Northboundary demo contract. Let's create a fresh contract... called Northboundary maintenance example. Let's put in the matching frequencies, the filters, the bells labor, let's put in... the invoicing schedule and that should do it.

--- Recurring maintenance ends ---

BILLY

24:52 We should have it then. And then we have, then we need to put in four example jobs, right? For or at least a couple maybe, you know, and.

BRIAN

25:04 We can, we can take from there. We just need to set up.

BILLY

25:07 And then all the data then it should all that should all.

DANIEL

25:12 And my understanding there is integration in place that you guys worked out that pushes some of that across or were you replicated by?

BILLY

25:18 As just assess.

BRIAN

25:20 Working on it, but just pretend monkeys are gonna type all the stuff down. Your problem is once the data, is there, let me build a report.

BILLY

25:29 Yeah, your problem is format.

BRIAN

25:30 Or one?

BILLY

25:32 And, and Daniel, if you wanna work with me on what you think that report looks like, I'll tell you when I and I'd say vents as well. We can tell you when we think you've got what they will, what they will like.

DANIEL

25:45 Okay.

BILLY

25:46 So, why don't and you can just do like three line items, three items of data, invoice, two invoices and three parts or whatever. And from there, we can tell you if we think your formatting is going to be good. So if you've got, when you got something that you want to share that we can see even as a screenshot from quick site or whatever, share that with me and vents, and we'll loop right back behind you on a phone call on a Zoom meeting and make sure that's good. But all this has to happen pretty pro to right? Chris.

DANIEL

26:21 Yeah, that was my next question. I got a quite a few pto holiday days, Wednesday is the only other day this week that I'm in and I think Vince and I were going to meet at least a half hour on Wednesday. Hopefully, maybe. Is that right? Or am I thinking of something else? No, we have nothing on the books yet.

VKUGEL

26:40 Yeah... we'll show you guys something if you can see my screen.

BILLY

26:45 Yup.

VKUGEL

26:46 Can you see it? Well, these are the reports that they'll be looking for?

BILLY

26:54 Are those, are those the computer? I mean?

VKUGEL

26:57 Those are all there's a report engine, all the reports that they look for, management.

BILLY

27:03 Hold on. Are those... coins reports or are those Northboundary reports?

VKUGEL

27:09 Coins...

BILLY

27:09 Coins? Okay.

VKUGEL

27:11 So, these are, you know, the kind of service screen performance report that's one of the primary reports. They look at... performance. This is service group, performance, service group, performance... more performance service sample.

BILLY

27:31 Hey, by the way... Daniel, you should call it the exact thing that they call it, even if it looks slightly different.

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

VKUGEL

27:40 So, these are, you know, their gross profit reports, agreement, performance reports, these are the standard management reports that they would look for. And so it's not just one report. They're gonna want 10 reports. And so you gotta have to kind of see the data that they look for in all the reporting.

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

BRIAN

28:01 Yeah, we know, well, from a year ago, anyway, we know they asked us to comp the work order status report, contract renewal report and contract status report. So, I think those are the, those are probably the highest value targets.

VKUGEL

28:15 Okay.

BRIAN

28:16 Okay. So.

DANIEL

28:17 Realistic to have the data stuff figured out by Wednesday so that Vince and I can work through the Construction on Wednesday.

BRIAN

28:24 Yeah. I mean, hey, so... this, I want to go into some Northboundary tenant somewhere and look at a... fully featured like realistic looking maintenance agreement. Where should I go?

VKUGEL

28:45 You could the last credentials that I gave you, if you go in there, you would go maintenance on the left toolbar maintenance management.

BRIAN

28:55 And there's some already built out man.

VKUGEL

28:57 You can.

BRIAN

28:57 Just...

VKUGEL

28:58 Yeah, just pick any one of them.

BILLY

29:01 All right. Yeah, pick one that you think looks good, then circle back with 10, Brian, and say, hey, I think this one looks good... and then have him affirm that, you know, you're looking at what you need to be looking at?

BRIAN

29:13 Doing it now?

BILLY

29:15 Okay. Great. Love it.

BRIAN

29:17 I see no, nothing. You said maintenance management, right? Yeah. Okay. Yeah, I don't see anything.

VKUGEL

29:23 At the top under the organization, pick all users.

BRIAN

29:27 All right.

DANIEL

29:32 Is that PDF in the meeting? Invite Chris or somewhere I can get to.

CHRIS

29:37 The PDF I originally had were in the meeting invite.

DANIEL

29:40 Okay. Cool.

CHRIS

29:43 If you need my.

BRIAN

29:44 I see only one for good year. I maybe I should be doing something wrong.

VKUGEL

29:49 Yeah, that was the original credentials. I sent you a set.

BRIAN

29:53 Say.

VKUGEL

29:53 The credentials?

BRIAN

29:54 All right.

VKUGEL

29:55 Because the second set went into the demo account. I use every day.

BRIAN

30:00 Okay.

VKUGEL

30:00 But that one job, it would be a complete job if you just wanted to look at it where you're logged in at.

BRIAN

30:07 Okay.

BRIAN

30:12 I got it. The apex one understood. Okay, I'll holler... if I get confused thanks.

VKUGEL

30:18 Yeah. If you want me to walk you through something, we can go through it. If you go into pricing, you'll see reports and... the pricing summary. We'll have all the...

BILLY

30:30 Yeah. James, who is on your staff other than Jose that's going to be in that solutions architectural?

JAMES

30:41 I mean, at the moment that it... is.

BILLY

30:47 Well, this is the kind of thing I'd like for sell to go run because she's going to have to know how to do this anyway. So I don't know how or if we can loop her into this time, but for future reference, this is the stuff that she needs to run down.

JAMES

31:03 Yeah, I agree. And she's been involved in the burn heard a little bit, but that's been primarily been setting up service forms on that deal. I guess it just depends on when Daniel and events can meet on Wednesday to see if she can be looped into.

BRIAN

31:19 Yeah. So the work here is set a bunch of stuff up in service trade between now and Wednesday. Can she do that?

JAMES

31:27 Between now and when? And the, in the mechanical demo using that report that you just.

--- Recurring maintenance ---

BILLY

31:33 Using mentors data?

BRIAN

31:35 Yeah.

JAMES

31:36 Should be.

DANIEL

31:37 Our, our roll up entity is one single job on the Northboundary end. We want everything under that job is our sample set on Northboundary. And that's also the set that's gonna jump.

BILLY

31:47 I'm not sure. I'm not sure the roll up entity is a job. I feel like it should be a contract because you're going to do multiple maintenance job under a single contract.

--- Recurring maintenance ends ---

VKUGEL

31:56 Yeah. And so we have so much information in Northboundary because we produce tasking and so we know how many hours we're gonna put in each visit and we know what we're gonna do in those visits and... there's a lot of that detail is in Northboundary.

BILLY

32:19 Yeah, that's the budget and.

VKUGEL

32:20 That's right? We have all the budgeting information.

BRIAN

32:24 Yeah. I, management, as I think what you're looking for there in Northboundary, that's the sort of the equivalent of our contract. Sorry, Daniel, I cut you off.

DANIEL

32:32 I was just gonna say my goal over the ask here is that we can agree on the role of entities so that we know we can tie out numbers like literally numbers system to system saying this. We're gonna migrate everything under this contract or everything

under this company or everything under this one job. And then that ties out in the demo count one to one for real.

VKUGEL

32:49 I can look at a booking report and just send you over all the booking data. And then you can see if there's somewhere in service trade, you could put a plan together that uses that booking data.

BRIAN

33:04 Let's do. So. Chris and Billy, I don't think we need you guys anymore because we're getting in the implementation weeds, Daniel, James, have you guys, are you guys available for a couple of more minutes? We can knock this out right now? You still available?

VKUGEL

33:16 Yeah.

BILLY

33:16 It out now and we'll circle back, Chris. You and I will circle back tomorrow time frame and then maybe join their meeting on Wednesday that they get together when Daniel is back, just to confirm everything and make sure we understand it. And then we can set up rough off with 10 and me and you and probably either James or Brian.

CHRIS

33:38 So, two two quick questions. Just wanna make sure Billy that we have an understanding of who's going to do the show and tell. So who's going to show what? So Vince is obviously gonna do the Northboundary side in terms of the service trade side. I don't know how much we need to show there. And then I would assume Daniel would have the quick site reporting side.

BILLY

33:58 It'll it'll be either James or Brian.

CHRIS

34:01 Okay. Okay. And then.

BILLY

34:04 Probably James, right? But we'll see.

CHRIS

34:08 Okay. And then sounds like this is going to be a meeting setup with David Sloan, probably next week.

VKUGEL



34:16 Not sure about next week because it is a Christmas week. If he's available, but take a...

*--- Purchase decision ---*

CHRIS

34:21 Payment all be available, so.

BILLY

34:24 In to close it then, but I would say there's no point in doing next week if they're not willing to make a decision next week. Okay? There's no point, right? We got other stuff to work on if they can't get done, but tell them look, this is, we will be aggressive to kick Northboundary out of an account if he wants to see this.

*--- Purchase decision ends ---*

BILLY

34:44 See if the, if there's somebody around that can sign that wants to sign, we're willing to show up. Okay? All right. Perfect. Thank you.

BRIAN

34:55 All right. Billy, before you leave real quick, let's all get let's all get religion on the same terms. So, what then, what Northboundary calls maintenance agreements is what we call contracts. Everybody agree on that.

BILLY

35:08 Correct. We're gonna name it. We're gonna name it. We're gonna name it maintenance contract from Northboundary.

BRIAN

35:15 We got it. Second thing, Daniel asked, hey, let's make sure we agree on roll up entity. These are called under maintenance management. These are called jobs. So, when he said job, that's what he meant, everybody agree that's what he meant.

*--- Assets ---*

BILLY

35:27 I don't know what a job is in Northboundary.

BRIAN

35:29 All right. Well, we're going to be real clear on that right now before we all leave this call, right? Then this.

VKUGEL

35:34 Jobs in Northboundary, is a maintenance job, all the assets, the customer information, all the pricing, all the tasking, everything resides in the job.

*--- Recurring maintenance ---*

BILLY

35:46 And several.

BRIAN

35:46 Visits might occur.

BILLY

35:48 Hold on, hold on in service trade. A job is a single instance. Then if they're supposed to go four times a year, do you have four jobs or is that one job?

VKUGEL

36:04 If I...

BILLY

36:05 If they go four times a?

VKUGEL

36:06 What we call a job is a job. I think what you call a job as a work order.

*--- Recurring maintenance ends ---*

BILLY

36:11 There you go. There's. Your, when they say when vent says job for us, that means contract?

BRIAN

36:18 Yeah, good. Now, we all agree. Cool. Okay. All right... Chris and Billy, you guys need to cover anything else or can we go work on the implementation for a little bit?

BILLY

36:30 On implementation that's perfect.

BRIAN

36:32 Thank you. Very good. All right.

CHRIS

36:34 Which one of these?

VKUGEL

36:36 Well, I can demo on my side if you want me to show the screen or?

BRIAN

36:40 Yeah. What I'm looking for more is like, I don't want to spend a bunch of time doing a full demo here. What I want is a specific job that is good. Like I have a good example of some.

VKUGEL

36:51 Good year seven.

BRIAN

36:52 100 sample data, cool.

CHRIS

36:54 Zoom, and I just made you the host, so.

BRIAN

36:56 Sir. You?

CHRIS

36:57 Should be going.

BRIAN

36:58 Cool. So, we've got some stuff in it. Great.

VKUGEL

37:01 Well, if you look at that, any of those assets?

BRIAN

37:04 Yup.

VKUGEL

37:05 Just so you know... if you show inspections... on the right there's a, in a green box, the lowest green box.

BRIAN

37:15 And...

VKUGEL

37:16 Then if you pick user to find time, it'll show you the time right next to it in that same box area a little bit. Yeah, there you go.

BRIAN

37:24 Okay, great.

VKUGEL

37:25 So, those are the visits and that's how much time for that asset?

BRIAN

37:29 Cool. So, if I wanna see, all right time, makes sense. If I wanna see parts you get used here, that would be under filters and belts if there were any.

VKUGEL

37:36 EPA...

BRIAN

37:37 Cool. Is there?

VKUGEL

37:39 Get a package in. It would have filters and bounce?

BRIAN

37:41 Okay. There, that's why it was cool. All right.

VKUGEL

37:46 Asking it'll, have when you're going to do what?

BRIAN

37:49 Cool. And this agreement doesn't care when the summer maintenance occurs, it just cares it, it's going to happen in the summer and the user decides what summer means, right?

VKUGEL

37:58 Yeah. If you go to planning.

BRIAN

37:59 Yeah.

VKUGEL

38:01 At the top, there's a little planning tab at the very top. Yeah.

BRIAN

38:05 I'm sure. I'm missing... no.

VKUGEL

38:08 All the way up one more.

BRIAN

38:10 Got it. Cool. Here. That's what we're looking for.

VKUGEL

38:16 And there will be the schedule, it breaking it down by spring, summer, fall, winter coat. Then if you plug it into the schedule, if you hit load 15 minute rounding, it takes the time and puts it into the schedule when that service will occur.

BRIAN

38:32 Okay, cool. And the output of that is up here, right? No, that's estimate.

VKUGEL

38:37 What you'd have to look at, you can look at annual. If you hit reports top right corner... you can look that right there. An annual report. It would show you for the year, all the tasks that you would provide doing that.

BRIAN

38:55 All right. Good. Yeah, that's more detail than we want. What we're looking, I think.

VKUGEL

38:58 If you look at service pricing.

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

BRIAN

39:00 Just time and up, yeah. And...

VKUGEL

39:03 If you look at pricing summary, okay.

BRIAN

39:06 Wrong thing. Sorry.

VKUGEL

39:07 Right. Service pricing summary. Just click on the first one and then print.

VKUGEL

39:18 That shows you if they sold a plan maintenance agreement. So, we're showing five, six programs there. If it was planned maintenance, we're showing travel labor, PM, labor, filter, belt labor, unplanned labor for emergency service, vehicle expense, PM, material, filter belt material, unplanned material, and then subs. So it shows the spend plan there. What is available to spend on this job that's what they would be, their budget is what they're going to track against. Is that right there?

BRIAN

39:49 Okay. Got it. Okay. Daniel James and me, our goal here is get sort of the relevant bits of this into corresponding services and assets.

*--- Accounting ---*

VKUGEL

40:03 You can go where to?

BRIAN

40:05 And then just a second... and then make a couple of jobs and invoices underneath that to drive annual support. Yeah, under action.

VKUGEL

40:15 If you created a new job, there's an export job to service trade.

BRIAN

40:19 Yeah.

VKUGEL

40:20 That would push it over.

BRIAN

40:22 Cool. But...

VKUGEL

40:23 Yeah... that one's probably already been over. Yeah, it works.

*--- Accounting ends ---*

BRIAN

40:27 Cool. What happens if I try to send the same one twice?

VKUGEL

40:31 To double the inventory, it would ask you like if you're adding inventory, it'll say, hey... it'll check. If it's the same job, it won't push it over. If I added one more asset to the same job, it would just push that one asset over.

BRIAN

40:47 Cool. Well, now, I feel like I got to click it. Cool. Location name cool.

VKUGEL

40:54 Yeah.

BRIAN

40:55 All right. This might be... export CSV to template.

VKUGEL

41:06 That one, the way.

BRIAN

41:08 Yeah. Is there a given all to me thing?

VKUGEL

41:10 Yeah. If you pick the two above it, get out of this one, this is if someone designs their own.

BRIAN

41:17 Okay.

VKUGEL

41:18 But if you just say export CSV, it's like the second action.

BRIAN

41:23 Yeah, that's what I look...

VKUGEL

41:24 For that's the.

BRIAN

41:25 Yeah, cool.

VKUGEL

41:33 Yep, for.

CHRIS

41:33 On here.

BRIAN

41:38 All right. Good enough. I think that gives us enough stuff to work with James. Let's have us all do as much of the heavy lifting on this as we can. We want to round her up and I'm happy to hop on and we can get through this together because I don't she's seen Northboundary yet.

VKUGEL

41:55 Under service pricing, there's a series of reports that you can look at additional information belts and filters and stuff like that?

BRIAN

42:02 Cool.

JAMES

42:04 You want me to see if she's available to join now?

BRIAN

42:08 I need to drop to help Tania with an impact thing. But yeah, if you can pick up a ball from here then, yeah, that'll be fine with me.

JAMES

42:14 Okay. So, pick it up means I gotta be able to log in to the screen you're sharing?

BRIAN

42:21 Yeah, that's a good point. Hey, can I, am I admin? I am admin? Sweet that's what I wanted.

VKUGEL

42:29 Go back.

BRIAN

42:30 Yeah.

VKUGEL

42:32 And on the left six item down as user management.

BRIAN

42:37 Gotcha.

VKUGEL



42:42 So, we have a couple of different accounts. This one I demo in every day. So you don't want to mess it up too much, you can use it and do stuff in it. Just don't make major... changes that are gonna mess with my demo. The other account that I gave you was wide open. You could add everybody you want there as well.

BRIAN

43:04 Cool.

VKUGEL

43:04 And I don't care which one you put people in, but I'm just...

BRIAN

43:07 Okay. I think we should use both, but for now, James, you cool. Is there a good role for read only without breaking stuff?

VKUGEL

43:15 A user is not read only, but they can just, they're not administrators. They can't do a whole lot. Okay?

BRIAN

43:21 You care what the company is?

VKUGEL

43:24 No.

BRIAN

43:24 It doesn't actually do anything, does it?

VKUGEL

43:26 No.

BRIAN

43:26 All right.

JAMES

43:29 Those, my email yeah.

BRIAN

43:31 Yeah, I'll have to get you another one for the break things account.

VKUGEL

43:37 You can just make one up.

BRIAN

43:38 Yeah.

VKUGEL

43:40 Password to?

BRIAN

43:43 There we go. We'll give you a real password, like a man. Okay, totally worked. All right, or does the org and stuff matter? It does not, right?

VKUGEL

43:51 Yeah, just put them like the main group.

BRIAN

43:54 Got it. Division empty or need admin. Does it matter?

VKUGEL

44:00 Doesn't matter too much in there. That's just people by default, their service.

BRIAN

44:08 I didn't like my...

VKUGEL

44:09 Passwords.

BRIAN

44:10 All right. Fine. Whatever. Give you a better password. I'm gonna make you remember that James, you already there, holms... that's all.

VKUGEL

44:28 Maybe it saved him, but it didn't like the password. I see. I'm James Jordan.

BRIAN

44:34 You see two of them?

VKUGEL

44:38 I see one, you can see.

JAMES

44:39 Demo a demo?

VKUGEL

44:44 That's probably where it had because it had a plus in there that's probably the error it had. If you pick James, you can take that plus out... unless you want that plus is okay. I was thinking is the at, but the at, yeah, we're good.

BRIAN

45:00 He might, I might have already set him up in the other account, the play around the account. Okay? So, anyway, now, you're hooked up James?

BRIAN

45:13 Right. You wanna, you want to do seo now without me or later with seo with me up to you?

VKUGEL

45:21 Talking to you?

BRIAN

45:22 All right, James.

JAMES

45:23 I mean, I guess it just depends on when she can be available. She might be available tomorrow morning. She's prepping for... the hard demo.

BRIAN

45:33 Yeah.

JAMES

45:34 So, she's got that from 10 to 12 and...

BRIAN

45:39 Demos, from 10 to 12 or perhaps from 10 to 12, perhaps. All right. Okay. I could do, pretend.

JAMES

45:49 I can see if she's... yeah, she, we're going to have to stop people from having meeting prep for meetings all on Prem that's...

BRIAN

46:00 For you?

JAMES

46:01 Fascinating. So, anyway, she can kill the meeting that is preparing for the meeting that is about preparation for a meeting that would be the nine 30 to 10. So in theory, she's free before 10. So I'll verify with her that's...

VKUGEL

46:15 What's your goal? Because my day is booked tomorrow?

JAMES

46:20 To give that data converted over to ServiceTrade data, yeah.

BRIAN

46:24 We might have some, we might have some specific tactical questions.

VKUGEL

46:28 Yeah, you can, right?

BRIAN

46:30 Yeah.

VKUGEL

46:30 Gotcha. Okay?

BRIAN

46:32 Yeah, I don't want it's. Probably going to be a waste of your time, you know, with mostly just monkeys type and stuff in the screen, so.

VKUGEL

46:38 Okay. Whatever you need. Let me...

JAMES

46:40 Know you're not available tomorrow, is that right?

DANIEL

46:42 They can, if absolutely needed, but I had to have a pto day currently scheduled, correct?

JAMES

46:51 Okay. I think the main thing is just once we get it in there, you have to review it to make sure that it's right? Okay.

DANIEL

47:00 Calling right? The data points gathered or the actual tie out of the numbers between the two systems, right?

JAMES

47:09 I think it's just gonna matter that you get the report and service trade, right?

DANIEL

47:14 The specific points we need are transferred over. Okay? And then...

BRIAN

47:22 It'll be it'll be right or close to it by the time you roll in on Wednesday.

DANIEL

47:26 And then my output goal is PDF essentially or some nicer version thereof.

BRIAN

47:33 Yeah. Something prettier that has all the key bits in it, profitability for the contract and for the individual jobs underneath it is gonna be the key thing.

DANIEL

47:43 Okay.

JAMES

47:43 Brian, what time do you want me to invite you? Do you want to do a nine to 10 or eight 30 to 10?

BRIAN

47:49 Nine to 10, fine, eight 30 is fine. If you want to get rolling that.

JAMES

47:54 About you and I.

BRIAN

47:55 To bye.

JAMES

47:57 Are you gonna be in the office?

BRIAN

47:59 I am together?

VKUGEL

48:02 Yeah, I...

CHRIS

48:04 All right. Be great.

JAMES

48:05 Good.

BRIAN

48:06 Cool. Man. All right. Thanks. Hey, thanks, Betty. Sure all.

VKUGEL

48:12 Right. See you guys.

*The End*