# Followup ServiceTrade Demo with Crete Mechanical

Joseph Summerell with Air Professional Assoc, Crete Mechanical, Facility Systems Services Inc, Industrial Maintenance & Automation, Nielsen Mechanical Contractors, and Pro Tech Mechanical Inc
Recorded on 8/23/23 via Zoom, 1 hour 35 min.

## Participants

### ServiceTrade

Joseph Summerell
*Field Manager*

Jourdon Winfield
*Solutions Architect*

Adam Strong
*Solutions Architect*

### Air Professional Assoc

Carlo Nero
*Chief Financial Officer*

### Nielsen Mechanical Contractors

Chris Wendel
*General Service Manager*

### Pro Tech Mechanical Inc

Raquel Evans
*HVAC Coordinator*

Bryan Partridge
*General Manager*

## Crete Mechanical

Joseph Sutton
*MIS Manager*

Milly Martin
*MIS Manager*

## Other

DEckard

Carole Anne

13618822101

19142760100

Reid Auger

Gregory’s IPhone

Family’s IPhone

Jose Ortiz

17044760029

Tiffany

Justin Pfeifer

Shane Cook

# Topics

# Transcript

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

FAMILY'S

0:00 Hello... Joe. Hey, by the way, I think I put my phone in instead of my name.

JOSEPH SUMMERELL

0:12 Yeah. Okay. I was wondering if his name was Stanley.

FAMILY'S

0:14 Yeah, I go by all sorts. I'll only be on for a little bit because I got to jump on a flight. Okay? But looking forward to the call and hopefully plenty of questions from our partners and I think maybe just get through the introductions as quick as we can. Just a quick who's on the call and then just move into the meat and potatoes as quick as you can be great.

JOSEPH SUMMERELL

0:41 That sounds great. I can do it.

FAMILY'S

0:43 I hit into Greensboro, North Carolina. Yeah, awesome.

JOSEPH SUMMERELL

0:51 That's where I grew.

FAMILY'S

0:51 Up it is. Where are you now?

JOSEPH SUMMERELL

0:55 Raleigh, so only about an hour away.

FAMILY'S

0:57 Well, I'm flying into Raleigh, so.

JOSEPH SUMMERELL

1:00 Okay, great.

FAMILY'S

1:01 I use it's either Charlotte or rally and it's depending on the time of day depends what's the traffic's worse to get there.

JOSEPH SUMMERELL

1:08 Raleigh.

CHRIS

1:09 On the...

JOSEPH SUMMERELL

1:10 Greensboro side of the city. So that helps.

FAMILY'S

1:13 I do like the airport. A lot. It's a lot nicer, yeah, a lot less hectic than the Charlotte airport.

JOSEPH SUMMERELL

1:23 That's for sure. Yeah. So, I did some homework and kinda looked up everybody's titles and stuff. So I kinda have a good idea of who else is going to be on here, I think.

--- *Purchase decision* ---

FAMILY'S

1:32 And then, and they'll probably invite some other people on their team as well. So, we have one of the owners, some of the owners may sit with them and stuff like that. I just... so, we've got, a, good selection of people.

JOSEPH SUMMERELL

1:47 Fantastic. Well, looking forward to seeing what kinds of questions they come up with as we go through this. I think we'll have a pretty, actually a very comprehensive demo today.

--- *Purchase decision ends* ---

FAMILY'S

1:57 Okay, good. Nobody's on yet by it's two o'clock that's concerning?

JOSEPH SUMMERELL

2:03 No, I'm seeing a lot of people getting on.

FAMILY'S

2:06 Okay. Probably.

JOSEPH SUMMERELL

2:07 12 15.

FAMILY’S

2:10 Good, good. All right. Well, I'll be quiet then I'll just sit the side here. Okay? No worries. Thank you.

JOSEPH SUMMERELL

2:26 Hey, how's it going? This is mill, hey, nilly doing well. I hope you are pretty good.

FAMILY’S

2:32 Hey, Emily.

JOSEPH SUMMERELL

2:34 In the airport, what's happening there?

FAMILY’S

2:36 I'm in the airport.

JOSEPH SUMMERELL

2:37 Okay.

FAMILY’S

2:39 I'm only going to be only be here for a little bit. So I gotta get on a flight.

JOSEPH SUMMERELL

2:44 Now, he's just grabbing lunch in the airport. Yeah.

FAMILY’S

2:49 I got the travel bug, whatever it is.

JOSEPH SUMMERELL

3:00 Well, do you wanna start, do you wanna kick it off? Joseph? I can, looks like we have a few more people still joining up but, I can go ahead and get started. So I'm Jay, I'm with service trade. I've met some before. Not everybody. I am out of Raleigh, North Carolina with me from service trade. I have Adam strong. Who is, he does a lot for service trade? He has been a develop.

FAMILY’S

3:28 For...

JOSEPH SUMMERELL

3:28 A lot of our systems and also is now helping us to explain anything that may seem complex or an answer questions because, he knows the tech.

FAMILY'S

3:40 Technological...

JOSEPH SUMMERELL

3:41 Side of everything very well. So Adam is here with me today and we should be able to answer any questions that you'll have Milly sent over a pretty comprehensive list of everything to cover. So we will, I mean we'll start from new customer setup, go all the way to billing. We'll we'll cover quite a lot today, so.

FAMILY'S

4:05 Wanted to.

JOSEPH SUMMERELL

4:06 Start by kind of if everybody wants to do a quick introduction of who they are, what company they're with and what their role is there. I think that be great to give us a bit of a background on kind of, what all is going to be important to everybody. I know that's kind of a tough for everybody to just kinda call out who they are. But if you don't mind come off mute and say who you are.

--- *Type of work* ---

CHRIS

4:32 This is Chris. Well on the service manager at Nelson mechanical. We do for amount of TAM service contracts. We do a bunch of projects as well, special projects out of the service department or replacements, any split installs, stuff like that. So that's kind of what I'm looking for, in the software.

TIFFANY

4:54 Awesome. On Tiffany, right side with protect mechanical on part of the ownership of protect. We have about 22 service technicians. Our business is about a third of service and two thirds Construction. We had been in a small software BuildOps for many years, and then of course, just went over to spectrum in the last six or seven months. And so we're looking for something that can... provide a service again because spectrum is not, doesn't have any of the platform that we're used to. So we're excited to see what you can offer.

JOSEPH SUMMERELL

5:35 Great. Thank you.

ADAM

5:36 Tiny.

SHANE

5:37 Hey, this is Shane cook with facility system services, commercial, hvac full service install service and hvac controls.

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

SHANE

5:49 So we're 60 or so employees strong. I'm the operations manager over the company. Also, we were a previous BuildOps user and I agree with the no service platform currently.

JOSEPH SUMMERELL

6:12 So you were on BuildOps and then move to spectrum for you to run the service department. And now you all are clearly deciding whether to go with service trade or BuildOps.

*--- Paper process ---*

SHANE

6:21 That's correct?

JOSEPH SUMMERELL

6:22 Okay. If you don't mind me asking, how was your experience with build ups?

SHANE

6:29 Personally, it was great. Actually, I checked a lot of boxes and needs. We're currently back on paper, having to fill out tasking sheets and such for customers, which is pretty archaic.

JOSEPH SUMMERELL

6:45 Okay. Well, great. Well, hopefully we'll get you off paper one way or the other here pretty soon.

*--- Type of work ---*

JOSEPH SUMMERELL

6:58 Anybody else?

JOSEPH SUMMERELL

7:04 This is Greg Jones sales and service director for protect mechanical. We've got as typically said 26 technicians doing plumbing and hvac and electrical. Awesome. Cool. Well, that gives me a real good idea of kind of who all is on the call? What's going to be?

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

JOSEPH SUMMERELL

7:28 What with your, what your roles are. It sounds like we need to focus on service and we need to focus on the small projects as well. So we'll be sure to cover both of those during today's. Demo, a little bit of background on service trade. As a company. We've been around now for about 11, 12 years. We were built specifically for commercial service contractors and really focus only on mechanical and fire and life safety companies. Really those who are doing small projects and then service and maintenance, especially recurring maintenance. So we help keep up with when PMS are due, help with that tasking, help drive pool through revenue from those maintenance contracts and then really help demonstrate the value of what's going, what happened back to the customer. So I'll show you a couple of examples of that. Today. One thing we've really been focused on... recently is helping sell more. How do we help you sell more projects? And how do we help you sell more maintenance contracts? So I'll touch on that at the beginning because one of the things that Millis sent over to me to cover was new customer, like when you get a new customer, how do we, how do we set them up? So I'll go ahead and share my screen here. Can everybody see my screen?

TIFFANY

8:54 Yes.

JOSEPH SUMMERELL

8:55 Fantastic. So when we're setting up a new customer, it all depends really on where you wanna start and where you're starting your journey with service trade, some folks who are going to sell a new maintenance contract, they'll start here with our Northboundary application. This is specifically for sales folks, and then it can pass the information over to service trade. Some folks will start in service trade if they're getting those new customers to are winning the business outside of our platform. But you can kinda pick and choose how you want to do it. So if we are starting it here within Northboundary, let's see. I'll go to a maintenance agreement that I have built out.

*--- Assets ---*

JOSEPH SUMMERELL

9:35 So let's say we're looking at getting the PM agreement for cosco in Durham, North Carolina. I can use a mobile application to scan in all the equipment with make model serial number. I can put the filters and belts that are going to be needed in order to build out a really good PM proposal.

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

JOSEPH SUMMERELL

9:54 I can adjust any sort of pricing metrics as needed. So say, this wasn't a costco. This was a prison and we were doing a PM there. We may want to put 30 percent more labor on everything across the board just because it's gonna be hard to get to and we're going to have to just take more time with it.

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

JOSEPH SUMMERELL

10:11 I can go ahead and apply those things in bulk and this uses astray data to understand how many hours should be spent at each visit, everything that you should be doing that sort of stuff. Of course, you can always mess with, the kind of the matrix in the background to find TUNE it for your company.

--- *Quote templates* ---

JOSEPH SUMMERELL

10:30 But once you kind of get this laid out the way you want, it makes it super easy to generate proposals on the fly. So once you get your assets in there, make any service pricing adjustments you need to. You can go straight to a, I guess save that.

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

JOSEPH SUMMERELL

10:44 Before I move onto the proposal, you can go straight on over to a proposal. And when you go to either print it or send it for E sign or however you want to send it to the customer... it'll compile it all into a nice pre package and you can send it over to the customer that way. So I can have your logo, each individual company can have their own logo in there. It'll go through all of you can set this up however you want with whatever verbiage you want, whatever sort of... documents on. Hey, this is why PMS valuable, that sort of thing. Then you can send it over to your customer via E sign.

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

11:23 So I can go right down here to where it talks about the pricing and signatures and all that. And then it can also at the very bottom have all the asset data and all the filters that you're going to replace that sort of stuff. So for some folks, this is where an agreement gets closed one and then, the customer entry into service trade is just the click of a button and it will push over the customer, the location, the services in which, and the intervals in which they're due, and all the asset information for anybody not using Northboundary, that stuff can be either imported or input right here in service trades UI. So let's open up or any questions on that before I get into this piece?

--- *Recurring maintenance ends* ---

JOSEPH SUTTON

12:10 That... that generation, I see Northboundary that's a different website than service trade?

JOSEPH SUMMERELL

12:18 That is correct. Yes, sir. So that is still under the service trade umbrella, but that is our application designed specifically for selling projects and maintenance contracts. So really when the sales people can stay in their own little space because their workflow is different than, the operational workflow within ServiceTrade.

JOSEPH SUTTON

12:37 So, do they need a separate log in for that?

JOSEPH SUMMERELL

12:40 They would, yes. Okay. Yep. But as same with service trade, we don't, we would that pricing is done per sales user and then you can have as many administrators in there as possible or as you want not as possible. I mean, you can have a ton in there, but we don't charge extra for administrators in that system. So whoever needs access to it can get access to it.

JOSEPH SUTTON

13:04 Okay. Thank you.

JOSEPH SUMMERELL

13:05 Yep.

JOSEPH SUMMERELL

13:11 All right. So I'm gonna go ahead and open up a customer page. This is, this is companies.

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

13:17 So if I needed to create a new customer company, I could do that right here. Type in the basic information and create a new company. Once I do that, then I can create locations underneath that company and tie them to it. So I'll show you that hierarchy here. So service trade, I'm gonna look at, we have the customer and then the locations underneath it. So I'm opening up a costco corporate headquarters location, or costco corporate headquarters company. And then I have all my different cosco locations underneath that. At the customer level, we'll keep up with those locations, any sort of attachments, maybe a one PM contract or something like that. And we can also keep up with contacts for that parent company.

--- *Assets* ---

CHRIS

14:06 You add the, locate, the new location from here, where it says or location, or do you have to create another spot and then add it in here?

JOSEPH SUMMERELL

14:15 No. So you just click add location and it takes you to the place where you can upload it or I'll put it on all the information.

*--- Accounting ---*

JOSEPH SUMMERELL

14:21 And if you're doing this in bulk, you can do excel import of locations and companies and all that. And we'll get it all set up for you on the front side with what you have now.

CHRIS

14:35 Makes sense. Thank you.

JOSEPH SUMMERELL

14:37 Yes, sir.

JOSEPH SUMMERELL

14:44 All right. The other thing I wanted to talk about setting up would be a technician... and then I'll go into the location page... all right.

*--- Deficiencies ---*

JOSEPH SUMMERELL

14:55 So if I needed to set up a new technician, that is that's pretty simple. You go into my company.

JOSEPH SUMMERELL

15:08 And then you'll be able to just say add a new technician. We never limit you from being able to add new technicians or anything because we never really want to slow you down.

*--- Deficiencies ends ---*

JOSEPH SUMMERELL

15:20 So you can go in here. You can add a user... type in a user name, create a password, forum, first name, last name, and then you can designate what kind of user they are. So if they're a technician, you'll need to check this box. So they have mobile app capabilities. But if they're just, a new dispatcher or something like that, then you don't need to check that box and they'll have all their access immediately. Another thing to note in here are the, once you create a user, you can add different capabilities for that user. So I'll be able to say, hey, this person, I want to be able to see dispatching and pricing, and all of that. Let me go back to my company and I'll show you that. So you can say, hey, you can create different... roles within the company of this person should have this capability. Let me pull myself up, Jason.

TIFFANY

16:26 Or...

JOSEPH SUMMERELL

16:28 And I have an account admin role, an account tech plus field quoting role, a budget management role. I have a lot of them turned on, but you can create these to whatever specifications you want to. So if you want an entry level technician to be really limited on the amount of information they can see about pricing and things like that, you can limit them. But then if you have a very experienced technician that's kind of a service manager, you can really open it up so that they have a lot more capabilities. Another thing to note here is you can go in and control what notifications you want coming in. So you can say, alright, well, any time one of my jobs is completed that I'm a sales person for I wanna know about it and you can set that up. Some people like notifications. Other people just get distracted by them, so you can customize all that.

JOSEPH SUMMERELL

17:27 Any questions there?

*--- Recurring maintenance ---*

JOSEPH SUMMERELL

17:40 All right. No, I'm gonna jump to the location page in service trade that I'll be working out of today. If I have maintenance services that are in service trade, this is well there where they will be housed per location. I, so I can see, I have an annual PM on RT number one at this location. I have an estimated price and duration in there for scheduling purposes. And then I can have a preferred technician. So I can try and send the same person out every single time to deliver this work. I'll also have a window in which, the work needs to get done.

*--- Recurring maintenance ends ---*

JOSEPH SUMMERELL

18:18 So I can have quick visibility into that. Looks like I'm running pretty late on this one. So I'm gonna move now to how we take all of the maintenance jobs and actually go in, find all what I'll do for the month and generate those. So I'll go up to jobs here and then service opportunities open that up.

*--- Recurring maintenance ---*

JOSEPH SUMMERELL

18:45 So when I run a service opportunities report, this is where I'll be able to say, hey show me everything due next month. I'll open it up to all offices and I can say, I can say certain offices. I can say all offices. I can do it for a specific type of work if I want to. So if I want to look at show me all my chiller PMS I need to do, I can filter it down that way. And then this will look at every single location within service trade and say, all right, these 15 or these 500 jobs need to get done.

*--- Recurring maintenance ends ---*

JOSEPH SUMMERELL

19:15 So I can select all of them or one by one over here, on the right hand side, it will show me a brief snippet of exactly what needs to be done in the window in which it needs to get done. And then once I select my job type for those, I can then create those jobs in bulk... once they're created to schedule them out and send them to the technicians. We have two different ways to schedule. So one thing I want to note here is everything I'm showing you today is live customers are using it. Nothing is still in development now. Of course, we are working on some things. So I'll be sure to note what may be coming soon. And this is one of those things. So right now, we have two scheduling pieces one that's based around a map and one that's a dispatch board over the next six months or so those will be combined so that it's an easier experience for the user. So when you create all of your maintenance jobs or something that you may be planning out for two weeks ahead of time all. Those jobs can populate onto a map like this. The color corresponds with a technician over here on the left hand side. And then the little icons within it will say whether they're not there's an appointment scheduled or if it's completed. So a checkmark can show completed. Those can also fall off of the map once they are actually completed. And then this gray one right here is a great example of something that has no technician or appointment assigned to it. So I can click on, let's put tray on this because it looks like he's already gonna be near by with that other purple one. And then I can click on his name and drag it down for Thursday. So now tray Wood has a job for him at playing a fitness on Thursday for four hours.

JOSEPH SUMMERELL

21:19 So if emergency job pops up three, three hours east of town, then you can make sure that you're hitting anything else along the way with this quick visibility.

JOSEPH SUMMERELL

21:33 The other way to schedule would be our dispatch board. So I can open that up. And each technician here will have their own swim Lane.

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

JOSEPH SUMMERELL

21:40 You can see the different jobs that have been assigned to them. This is the job I set up for us to look at today. So you can see I clocked in and I am still in route. I've been driving for 26 minutes. If we need to add a job, say an emergency call comes in that we need to get the technician out to you pretty quickly.

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

JOSEPH SUMMERELL

22:01 I can click on add a job right here and let's say... cosco calls us in Charlotte... it'll go ahead and fill in customer details as they as it has them in the system. Then I can go ahead and schedule that appointment right here if I want to or I can have that land in my unscheduled unassigned jobs. So I'm just sitting there waiting to be sent to a technician. So let's say I've got, I'll make an appointment for today at three o'clock... no AC, I can select an asset to service. If I know which are to you, I'm going out to service. I can go ahead and select that.

JOSEPH SUMMERELL

22:54 And then, so I've created an appointment but I have not added a technician... and I need to put a service line on there of hvac. So I can do this a couple of different ways. I can create that appointment with a technician. So it'll go straight onto their schedule. But if I don't know who's going to get out there, I can go ahead and create that without a technician, it'll land in this unassigned bucket up here. From there, I can click on it, see that Billy has time on his schedule and I'll put it on his schedule for three o'clock that will trigger a notification to Billy to say, hey, you need to get out here. There's been a change made to your schedule. Now, if no, or now, if you have a whole bank of service calls that have come in, they'll flow underneath this available jobs tab. So you can click and drag them down as needed. Or if not a whole lot of service calls have come in and you can get to some more PMS. You can look at your bank of PM calls up here and click and drag those down onto the schedule.

JOSEPH SUMMERELL

24:04 Any questions or comments there?

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

24:15 All right. Sounds good from here, I'm gonna go back to the location page that I have set up for today. Back at my costco location. I'll collapse these services and we'll walk through the rest of the data that is stored at the location level. So if you have recurring invoices that you want to send out of service trade, say you have a quarterly and annual service, but you build a customer on a monthly basis, you can have that housed within service trade, to send out, which is the click of a button. You can send all your recurring invoices for the month. The cool thing about this is it will understand that, hey, this invoice and then these PM services fall underneath the same contract. So you can look at that profitability as it comes in. So I'll go down and show you that right here. So I've got my costco contract tied to this location. I'll open that up and show you what that looks like. So this is my contract for cosco. I've got a quick status of it of expected revenue. How much has been invoiced to date? Looks like we're doing great on it.

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

JOSEPH SUMMERELL

25:28 I mean this is all demo data, but expecting margin 28. My actual margin is 63 that's fantastic within these contracts. You can have different pricing rules for different customers. So say cosco gets for, you can do mark up rules or set the price on it. You can create different contract rules for administrative charges, truck charges, markups invoice, notes, that sort of thing.

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

25:56 And then you can create child contracts as well. So maybe cosco has a parent contract, and then each individual location has their own little tweaks that they like to make. All of that can be housed right here along with any attachments. Any questions there?

*--- Assets ---*

JOSEPH SUMMERELL

26:22 Cool. All right. So back at this location page, the next thing I wanted to cover with you all would be the assets that we can house. So at each service trade location, you can put in all the assets that you're keeping track of, make model, serial number, belt sizes and quantities, things like that.

*--- Recurring maintenance ---*

JOSEPH SUMMERELL

26:41 So, the reason we like to have our clients like to put a lot of that information in is one easy to get to two. It helps you plan ahead if you can. It makes it easy to run a report of, hey show me all of, the filters and belts I'm gonna need for my ms this fall.

*--- Assets ---*

JOSEPH SUMMERELL

26:59 You can go ahead and run that report and get the totals of it and order those into the office in bulk if you want to. Everything here that you see in that's going to be in blue is something that's hyperlinked within service trade. So I can click on rooftop unit number one and I can drill down into it. I'll be able to see that make model zero number, all that stuff. Again. But in addition to that, I'll have an accordion with any sort of jobs and quotes and deficiencies that have been done on that job.

JOSEPH SUMMERELL

27:37 So the it'll have like I said, the jobs, the quotes that have been done on this rooftop unit deficiencies are going to be any sort of issues that have been found out there.

*--- Deficiencies ---*

JOSEPH SUMMERELL

27:51 It looks like a lot of these are just verified. None of them have truly been fixed. So it looks like I mean this is just finding the issues out in the field. If I open it up to show you the fixed ones, you can see this one's been verified.

*--- Assets ---*

JOSEPH SUMMERELL

28:06 This one's been fixed. This one's been fixed, that sort of thing. So you can really start to see the trends over time of what issues are being found on what pieces of equipment. You'll also be able to see the jobs broken down per piece of equipment. So if you're going to renew a contract with somebody or maybe try and sell them a new RTU, you can say, hey, you'll spend 15,000 dollars servicing this equipment over the last three years. But a new one is 35. It just financially makes more sense to go ahead and replace it. This can give you all that data to back it up really quickly. And then on top of that, you have attachments and comments per piece of equipment. So you can put maybe a wiring diagram or a PDF of the repair manual or something like that tied to the equipment. That way the text out in the field have easy access to it.

*--- Access to information ---*

JOSEPH SUMMERELL

29:09 All right. All good here.

SHANE

29:19 You may talk about it once we get to the mobile app, but adding the information on to a unit, can that be done from the mobile app or all has to be done from the office?

JOSEPH SUMMERELL

29:35 Yeah, I'll show you how to do it from the mobile app.

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

JOSEPH SUMMERELL

29:37 You can do it all sorts of different ways, whatever makes the most sense for you from the office. You can do it via bulk import. It can come over from that Northboundary application. If you scan it all in during the sales process or as a technician, you can add it as well.

*--- Quote templates ---*

SHANE

29:57 Perfect. Thanks.

JOSEPH SUMMERELL

30:02 All right. I think that's all to really cover, on the location page.

JOSEPH SUMMERELL

30:13 If I do need to add a new service or add a deficiency or add a job, I can always do that over here. On the right hand side, there's some quick add buttons that I can get to typically not where you would add a job, but you certainly can.

*--- Assets ---*

JOSEPH SUMMERELL

30:28 So from here, I'm going to go into the job I have set up for us today... is a preventative maintenance job at this cosco. So I've got three different services that

I'm taking care of the PM on RT number one and two as well as a compressor change out on our TU number two.

*--- Quote templates ---*

JOSEPH SUMMERELL

30:50 It looks like that was bad. Last time we were out there, some technician documented the deficiency. We got a repair quote approved. And so I've been able to add that to this job. You'll be able to have any sort of parts labor and materials that you're gonna need for every single PM that you do at this location, you can have those automatically populate so that you don't ever miss them.

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

JOSEPH SUMMERELL

31:16 And this is where it understands, hey, this, these parts and this labor is being applied to RT number one versus RT number two, which can really help separate it out later for reporting capabilities.

JOSEPH SUMMERELL

31:33 All right. Let me make sure I haven't missed anything. I've got a list of all the stuff Milly wanted me to cover.

*--- Access to information ---*

JOSEPH SUMMERELL

31:38 So see... yep. I think I'm hitting it. All right. Cool. So from here, I'm gonna slide out, excuse me, I'm gonna slide out into the mobile application... and then we'll come back to the office view here in a little bit. So when you log into your mobile app, it'll have a list of all of the jobs or work orders that the technician has scheduled for today.

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

JOSEPH SUMMERELL

32:06 If you wanna open it up for them, this is completely optional. But, you can say, hey, I've got certain work orders that I know Jimmy is gonna need to do and they're gonna just be, I'm just gonna make them do it at the end of the month. If he has extra time, he can get to him. If he doesn't I'll schedule them towards the end of the month, but you can have those fall into this unscheduled tab right here. And then the technician can sort by what's due soon, what's marked as a priority. And then simply what's close by. Now, that is completely optional. The other thing that's optional, there is this map feature. So if they do have a few hours to kill between work orders, they can just Zoom in and see, hey, what is close by to where I'm working right now. So I'm sitting right here. I could go check out one of these jobs at north hills in Raleigh.

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

JOSEPH SUMMERELL

33:02 Now, I've already clocked in that I am on the way in route to the job that I have set up at cosco in Raleigh. When I clock in down here at the bottom, I can then trigger an in route notification to notify the customer of exactly what time I'll be there. So it just says, hey, J summer with my fake company is a var services. He's on the way. This is what time you should expect them. When I get on site, I can say that I am there and this will turn green down at the bottom to start tracking that time on site, it'll also do a GPS snapshot of wherever the technician is when they do a clock event. So if they're 20 Miles away from cosco and they say they're there, it'll flag that for you.

JOSEPH SUTTON

33:47 Where does that live in the system?

JOSEPH SUMMERELL

33:51 The Geo location... so back on the job itself, underneath clock events, it just updated that I clocked in on site on two point one Miles away from cosco. So when you click on it, it'll show you where they are on just on Google maps.

JOSEPH SUTTON

34:07 Okay. Thank you.

JOSEPH SUMMERELL

34:13 Another thing to note there if you want to see what those in route notifications look like. There's two kinds of notifications that can be sent from service trade. This one is the in route notification say, hey, I'm on the way, this is sent by the technician with my estimated arrival time.

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

JOSEPH SUMMERELL

34:30 The other one that you can send is a service link. So this is a more comprehensive, maybe a point riot reminder that you send out the day before and then it can update live as the technician performs the work. And then ultimately the tasking sheets and pictures and all that can flow out thematically right into it. So this can be sent to the customer. Say, hey, you have an upcoming job, you can click on it, view the upcoming job as the customer. They can see, hey, there's an appointment on this day in time. This is who's coming. This is what they plan to do.

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

JOSEPH SUMMERELL

35:05 All right. All that looks good. And then as the technician completes things in the field, say, it's a four day long PM, they can kinda see, hey, the PM on RT one through 18 or done. But then the rest of them are going to be done over the next few days, these little check marks. They'll turn green right here.

*--- Assets ---*

JOSEPH SUMMERELL

35:32 All right. I'm gonna slide back over to the technician view here. The services will show us what exactly it is that we need to do today. So we've got our two different PMS and then that compressor swap out. One thing that we are working on is bringing, the tasking right underneath those services.

*--- Forms ---*

JOSEPH SUMMERELL

35:54 So you can see exactly what it is that your tasking is for each one of those pieces of equipment. Right now, it is underneath the view, more details tab. And then we'll generate blank paperwork for that job or for that piece of equipment. So I'll click on actions and download blank paperwork. We can take whatever sort of tasking sheets or PM checklists that you out, put it into service trade. And then with the right smart rules applied, it'll understand what paperwork is applicable for which job. And then it'll automatically put that up there as an option. And then it will automatically fill in the information that's needed.

*--- Assets ---*

JOSEPH SUMMERELL

36:31 So, RTU number two with my make model, serial number that flows right over from service trade, along with my names, addresses, phone numbers, that sort of thing. So technicians won't have to waste time typing all that stuff in and they also won't have to or won't have the opportunity to type it in wrong. That's only gonna get better with time. Any questions there?

*--- Deficiencies ---*

JOSEPH SUMMERELL

37:05 All right. Cool. So I'll keep working through these tiles. We've got our attachments right here. So this is simple enough. I can just click add attachment. I can add something from the library or I can just snap a photo out my window here. I can put it to a specific job or a specific service within that job, if I want it tied to a PM or with a project.

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

JOSEPH SUMMERELL

37:31 The services also can be used as phases so you can tie an attachment to a specific phase of a project... just by clicking into it like that and I can put a description of it.

*--- Deficiencies ---*

JOSEPH SUMMERELL

37:54 I can also, I can do pictures, I can do videos, I can do audio memos, and I can add PDF and all sorts of documents like that in here.

JOSEPH SUMMERELL

38:07 Next tile down is going to be job items. So as a technician, this is where I can go in and say, hey, I need to... add a part and say, I use a widget off of my truck.

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

JOSEPH SUMMERELL

38:19 I can click on that and I can say, I'm gonna bump that up to a quantity of three costs can be hidden from technicians, of course, but I have admin access in my account. So I see everything. The important thing for the technician to note is where this item is coming from. So let's say it's coming straight off of my truck. I can just select my warehouse as a truck. Let's say I'm in truck number two. So that way I can document where everything's coming from. Does anybody ever have their technicians cut POS in the field or is that all done in the office?

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

SHANE

38:58 We're allowing the technician to get their own pa.

FAMILY'S

39:02 Okay.

JOSEPH SUMMERELL

39:03 Cool. Well, I'll be sure to walk through that right here then. So if the technician needs to get their own po, they can just click this open up partsledger piece right here and it'll take them into where they can generate a po for this job. So it'll automatically populate that job number. And then I can type in a supplier and get a po. The other thing I can do here is look up stock. So let's say, I think I have a many pleaded filter in here. I can see if anybody else that might be close by has those available. So maybe truck number four is closer. The depot number one is closer than the part else. I can go there. Now. If those aren't convenient, I can just go down here and generate a po and go to the part else... say acne supplies, create new po.

JOSEPH SUMMERELL

40:02 And this will generate the po and add and I'll be able to add, the parts to that po and ultimately to that job.

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

JOSEPH SUMMERELL

40:34 Adam, did I do something wrong there or is my iPad in dirt?

ADAM

40:39 Yeah. I mean, you were supposed to be done with this like a minute ago. What account are you in?

JOSEPH SUMMERELL

40:45 I'm in the hvac account. Okay, hard work.

ADAM

40:52 Yeah. I'm taking a look, why don't, you move on? We can come back to it?

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

JOSEPH SUMMERELL

40:57 Okay. So once that part gets the po gets generated in, the part gets added, it'll flow right into here and they'll be able to mark it as ordered or received. And then that can update reporting in the background to say that it gives you visibility to say, all right, show me all the jobs with parts that need to be ordered or parts that are overdue for delivery. Or, hey show me all the jobs where all parts are received and I need to go deliver that work has good detailed reporting on that. Let's see if I go to this filter right here. I can show you all the different options there. So if it's from a vendor, I can have different statuses with that po number. If I generated the po number out of service trade, that would automatically flow right into here. But I'll just marked that one as received.

JOSEPH SUMMERELL

41:57 Is anybody cutting POS from the office side... and not letting technicians cut those POS? Yes. Okay. Adam. Do you mind walking through, the workflow for that?

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

ADAM

42:13 No, not at all. Let me get it's going. Yeah, Jay, I don't know why you weren't able to get to that screen, but I can show, I can show that for sure.

JOSEPH SUMMERELL

42:26 It's probably because I have an iPad from 2012.

ADAM

42:30 Yeah, maybe. But, this is basically where he left off, where we have the job number in there.

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

ADAM

42:38 And then I get some information about, the parts that I have available to order. I'm going to order and this is as a tech, I'm gonna order just these and I'm gonna get them from acne supplies. Like Jay wanted us to... click, create new po, and you see within half a second where we're there on the screen, I can add more items.

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

ADAM

43:05 If there were other things that I discovered, I need to... all sorts of things. The way that we do items in service trade is really powerful and flexible if you track things by part number and quantity and all of that. Like some of the filters that Jay was mentioning, we can do that.

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

ADAM

43:29 But if you have, you know, 40,000 different kinds of one off items that you don't want to have in your system, you just want to be able to order them when you need them directly to the job, not track them by part number. We don't force you to do that. So I could type in press?

FAMILY'S

43:46 Sir.

ADAM

43:48 Let's do a red one and notice that as I start typing out of my library, it still allows me to do that. That way you don't get stuck... you know, a technician having to make a phone call to the office to say I need this part number on the po. Another thing that a lot of our customers do when the tech is creating a po is actually instead of doing the part numbers and itemizing things and they'll do a box of stuff... and they'll just say, look, it's a 1,000 dollars in total. I'm gonna take a photograph of the receiver so you can get all the line item information. But as a technician who needs to get moving down to my next appointment, it's not worth it for me to itemize all those different bits and pieces, but I need a po number and it needs to be for a 1,000 dollars. I can do it that way. So I add that item to the purchase order and then finalize it. That's going to create that purchase order. Give me the number. Let the office know that I've done that, update the service trade jobs. So anyone who's watching that sees all that detail too. And with this little button right here, I can attach a photograph of the receiver. I don't have a picture handy at the moment, but I'll show you where that would end up if I were to have taken that photograph. But up here, I have purchase order 681. The thing I really care about and I can give that to the parts counter, and move on... over in, the service trade job. This is the one that we were looking at with Jay. Let's let's see what's happened. So I've got the box of stuff that wasn't there before for a 1,000 dollars with the supplier name, and then the couple of parts here they are, they've got some different status colors. The blue is ordered but not yet received. This one must have had, some anticipated delivery date J in the data. So it's thinking that it's late... but you have a number of different statuses available to you. And these are searchable. So if I wanna find all of the jobs where I have overdue parts or parts it to be received or another common thing that our customers do. We've received all the parts, everything on the job, is approved.

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

ADAM

46:25 The costs are correct. Now, I want to send out an invoice, help me build a queue of all the jobs in that condition and I can just go through and start invoicing for all those. Jobs, but if there are things that have yet to be received maybe with some placeholder costs, I don't wanna see those until they're done.

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

ADAM

46:43 These different statuses really help different folks in the office with workflow automation and prioritizing their time. So now I wanna order the rest of the parts for this job. And so I'm going to go into an office view and that's, the job number here.

ADAM

47:11 Yeah, I think that's it right there. No, it was not.

ADAM

47:22 There it is. So... yeah, Jay, these aren't these don't have, the part numbers attached to them. So I can't do that from the office specifically. But let me show, let me add a couple of things that do have some part numbers. So I'm gonna do some filters... and I'm gonna do is just a different size filter. So, the fourteens and the sixteenth in different quantities. And these are things that I want to order but I don't want the technician to do it. I want to have that control. What happens is all of the parts here and here's actually just as we're sitting here, let me do some other material, but I'm gonna do, that red compressor.

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

ADAM

48:28 Add my service line and let's say this is 505 100 dollars.

ADAM

48:38 So we can do our placeholder costs here or not. Placeholder costs, our placeholder kind of ad hock items right here. And I've got these three that I want to order. Let me just... it should show up in a second.

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

ADAM

48:57 But what I'm able to do is look at all of the items, that I still need to order. And there's a button up here to purchase all of those direct onto a po. So as soon as those items appear, I'm kinda going through this quickly. I can click a button. They all end up on a purchase order.

ADAM

49:28 Yeah, I don't know why they're not there yet, but maybe I'm just going too fast. But yeah. So once you have that purchase order, let me just show you the one that the technician created. I've got my po, the vendor, my warehouse, something that, you know, is J was showing looking up parts and pulling parts out of your warehouse. The technician doesn't have to search through all 100 warehouses to get to their truck every single time. If that service trade user, that technician has a default warehouse on their profile, it just picks out automatically. So it saves you a number of steps here's. My po, had I taken a photograph, it would have shown up here. So that would have been my receiver. And then as I update these like I don't like these placeholder costs, I'm gonna edit that real fast. I'm gonna do 10 15... and then that's going to show up right on the job. If I am ready to receive this purchase order. And I've got, you know, whether I've got all the parts or the invoice, most of our customers wait to receive until they have the invoice from the vendor in their hands. If I have all the lines here. And this matches the invoice. I have an easy button right here here to receive the entire purchase order with one click. Do that put in the vendor invoice number, whatever documentation number I need there. And I'm able to do that all in one click. If I have received only part of, the order, I can go in here and I can select which lines. And for the ones that have multiple quantities, maybe select some of those quantities and receive those. Then what you see is let's do it. I'm gonna do this one. And this one... this is a quantity of one. So of course, I'm gonna receive the entire thing. But instead of receiving all six, I'm going to do four.

ADAM

51:52 So, the four of this part and the one of this one... this updates to show the remainder, my purchase order updates to show that it's partially fulfilled. And for the item, that used to be six, it's now broken out into two. So we've got all four out of four out of this one and none of the remaining two. That's a great way again because we talked about that workflow automation. How does somebody know that you might be able to do some of the work with some of the parts but not the whole thing because there are still some and parts incoming by splitting them out this way, that's how we're able to show that everyone is always up to date no matter if you're in purchasing working through here, scheduling on the job. Let's let's see, should be able to see those items here.

ADAM

52:51 But everyone is able to get all of the accurate information. So here's the four that's received. And then the remaining two are in here as well.

ADAM

53:10 Yeah. And there's that... any questions about, the purchasing and purchasing from the office or from the technician?

*--- Access to information ---*

ADAM

53:32 Cool. Jay. You want me to pass it back to you?

JOSEPH SUMMERELL

53:35 Yeah, that sounds great. And I'll go back to the mobile app, excellent.

JOSEPH SUMMERELL

53:45 All right. So back here in the mobile app, gonna continue working through these tiles here. We have our comments. Those can be either for the job or for the location.

--- *Assets* ---

JOSEPH SUMMERELL

53:56 So if there's a gate code or an alarm code, something like that, you can tie that to a specific location. And then it'll populate every time a technician goes out there... underneath contacts, you'll have your list of contacts for that location with their different designations on it, whether it's an owner or financial or whatever the case is, assets are going to be where you, where the equipment is housed. So this is where you could go in as the technician, see what equipment you're working on that day or click on all and see everything at that location. Now, if I click into RT number one, I can see service history specifically for that one asset. So I can look back at all the old PM jobs and repair jobs that have been done without looking at it for the location as a whole. And I can click into that and I can see what exactly was performed. I can also view the deficiencies per piece of equipment. So I can see if anything is becoming a trend over time with said RTU, looks like we have a lot of bad compressors out there. Attachments will be pictures, videos, repair manuals, that sort of thing. And then down below, we have make model serial number, all that. So as a technician, I can add assets in the field. I can edit existing assets and I can go in and change whatever I need to. Or if I'm maybe doing a swap out of some sort, I can copy and make inactive. So if I'm taking an old RT out, putting pretty much the exact same one in, I can copy it, have a new one in there. And then just change the serial number... technicians generally like this because they can easily get to the historical information that they need.

--- *Deficiencies* ---

JOSEPH SUMMERELL

55:45 And they can also document the deficiency very quickly. So if I'm on this PM and I see, hey, RT number one has an issue. I can click add deficiency down here at the bottom, put in a description of it and say, hey, we have a bad compressor. I can snap a picture or a video of what exactly the issue is. So there's a picture of the compressor and maybe it's making a weird noise as well. So I can record an audio memo and say, hey, mill, I'm out at this cost go. We're gonna need some of this and some of that to get the repair done and they're looking to do it pretty quickly. So let's try and turn a quote around either today or tomorrow. One, this could be great to well show the customer, the problem that's happening on the site. But also makes it super easy for technicians to communicate back to the office, everything that they need to. From there. I'll mark the severity of the deficiency and say this one is inoperable needs to be fixed right away. I'll select the asset that it is on and I'll assign it a status of new fixed or verified. So, this was an issue last time I was out there and it's still an issue. I wanna be, I wanna show the customer. Hey, this is still an issue. We still need to get this fixed that way when it ultimately does break, you can kinda point back to it and say, mr, customer, I've been telling you this is a problem for a while. You need to, when I tell you something wrong, you need to act on it. I'll mark this one as new and I'll click save so that will trigger a notification back to the office to say, hey, this problem was found on this piece of equipment needs to be quoted out.

*--- Customer engagement ---*

JOSEPH SUMMERELL

57:30 And that information can also be shared, with the customer. So this is something really unique to service trade. We have streamlined this process to help drive revenue from your existing customers that you're already going to see. So technicians can document repair opportunities and get more of that pull through that high margin pull through revenue.

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

JOSEPH SUMMERELL

57:57 All right. So, let's say, I'm continuing on with this work order... kind of come into the end of it. So let's capture a customer signature, any sort of tasking sheet I fill out will fall underneath paperwork there. But let's say, I'm done with all that we'll just create a work acknowledgement and capture that customer signature at the end of the job. I'll select the contact that I'm working with. So I'll put this one as mill then click review. And this is where I can turn my tablet or phone around to the customer and say, hey, this is what we did today. We did these two PMS and replace a compressor for you. If everything looks good, you can just acknowledge that everything was completed as described. Click confirm and sign it, will confirm their contact information. And then they can sign away. Essentially, this replaces, the old triplicate paperwork that you would leave behind with a customer, this automate. Totally, you can get flattened into a PDF and e-mail it over to whoever signed it, and then you can e-mail a copy to other folks as well. At this point, I can go ahead and clock out as the technician it'll ask me if I completed what I came to do today. So let's say I don't mark any of those complete. It will then ask me, wait, why are you clocking out, what needs to happen here? So you can have different statuses on that now if I need to, or if I did complete everything I need to do, I can go to continue clocking out and I can make these three pieces requirements before the technician is able to clock out. So if they did not record a efficiency or at least say, hey, there are no deficiencies on this job or they did not attach a photo, it would not let them clock out until they do. So.

*--- Tech time tracking ---*

JOSEPH SUMMERELL

59:56 And that's really the mobile app. Any, any questions there?

CHRIS

1:00:01 Is the only way that this collects time? Is the clock in and out? Or is there a way that they could put in, you know, I was there for three hours?

JOSEPH SUMMERELL

1:00:10 Great question. Underneath job items is the alternate way to collect time.

*--- Quote templates ---*

JOSEPH SUMMERELL

1:00:15 So I can click add part labor or item… and I can just have, I can just select the type of labor. There are a lot of different options in here because it's a demo account, but I can have 15 types of labor or I can just have one and it can understand the different costs for the different technicians in the background.

*--- Tech time tracking ---*

JOSEPH SUMMERELL

1:00:34 Because if you see here, I can have general labor with a quantity of one and then it ties it to a specific technician with a used on date. So it can understand your cost, your burden rate per technician, and then assign a date used on that labor, that way in the background when it comes time to collect data for payroll, it can understand, alright, these hours belong to jays summary on this date. Does that answer your question? Yeah.

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

JOSEPH SUTTON

1:01:08 Can you default the type of labor used to a specific type of technician? You know, maybe there's a hvac versus electrician versus plumbing. That kind of thing like to say that we have these different rates based on the type of work being done. And so this is what you will use regardless of what you find on the app.

JOSEPH SUMMERELL

1:01:29 That's a great question. What do you think about that? Adam? Would you just create one type and then have the different costs for the different technicians in the background? Or would you just say, hey, if you're an electrician choose electrician labor?

ADAM

1:01:44 Probably that second one… so you can have an entire library of different rates, a class technician, B, class technician, electrical, plumbing, all sorts of stuff. And each one of those can have their own default rate. In addition to that, what Jay was alluding to is maybe he is more expensive when doing electrical work than I am. And in the background, when he's added as the electrical technician, the rate jumps up when I'm added, the rate does not, or maybe it goes down because I'm not as good.

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

ADAM

1:02:17 You can do a lot of different stuff with that. You can make it as complicated or as simple as you'd like, was that where you were looking for?

JOSEPH SUTTON

1:02:26 Yes, thank you.

ADAM

1:02:28 Great. Awesome.

CHRIS

1:02:31 Can you set it to where does it automatically when the technician gets the acknowledgement? Does it automatically send that e-mail or can we select whether it's reviewed or not before that gets sent?

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

JOSEPH SUMMERELL

1:02:45 Yeah, you can select whether you want that to be reviewed or not. The, the one that gets sent from the technician is very basic. It's more of just, hey, we came out to do these two things and they're completed it's. Not gonna have any sort of pricing or anything like that.

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

JOSEPH SUMMERELL

1:03:03 And a lot of folks don't put tasking sheets on that because they want to go through and make sure that the technician didn't misspell anything or any pictures that were taken, weren't accidentally added from their library. And God knows what flowed in there.

CHRIS

1:03:20 Okay. Thank you.

JOSEPH SUMMERELL

1:03:22 I'll show you that review process right now.

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

JOSEPH SUMMERELL

1:03:24 So when I go back to the office view of service trade, I'll quick refresh on this, make sure it's all up to date. Couple of things have happened here. These three services are now showing completed because I completed them out in the field. My parts that I've used have now shown that they are received. Adam showed you that piece and my clock events have been tallied up. So I spent 27 minutes on site and 38 minutes driving... the place where you would send that post service report from the office would be in this service link. So here, I can determine whether I want the appointment to show up the services that were done to show up or not comments.

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

JOSEPH SUMMERELL

1:04:17 I can toggle some of those on and say, all right... I like that comment, James doing a good job. I want that to go to the customer so that they can see it. Maybe it's a description of what the technician did underneath attachments. I can say, all right, yes, I want that one to show up, but I don't necessarily want that one to show up because that was just meant for the office, things like that. But I do want the deficiencies to show up because that is, those are the issues that were documented out in the field.

JOSEPH SUMMERELL

1:04:52 So I send that over to the customer. What it'll look like. I'll just pull up a full screen preview. It'll land in their inbox a lot like the one we saw earlier.

*--- Assets ---*

JOSEPH SUMMERELL

1:05:01 But now we have a few more things. We got the comments. We've got the attachments, got the deficiencies, things like that. So it shows that, hey, I fixed that compressor on our TU, number two, but I actually found another bad compressor on our TU number one while I was out there.

*--- Tech time tracking ---*

CHRIS

1:05:21 Yes, sir. All right. Where would the time show up that you added separately? The six hours other than the clock on the job?

JOSEPH SUMMERELL

1:05:32 The six hours that I added that would be... underneath parts of labor here?

JOSEPH SUMMERELL

1:05:45 I don't see that. I go through the full process of adding a might not.

*--- Tech time tracking ends ---*

ADAM

1:05:51 Sure you saved it.

JOSEPH SUMMERELL

1:05:53 I don't think I saved it either. All right. Let me add that real quick. And then I'll show you what that looks.

CHRIS

1:05:58 You're not at that, just if it's showing up there and the parts of labor we were good.

JOSEPH SUMMERELL

1:06:03 Okay. Yeah, shows up right there and it has the technician in which it's assigned to.

*--- Tech time tracking ---*

JOSEPH SUMMERELL

1:06:07 And I'll show you that actual time card here in a second as well of how it compiles all at the end because you don't want to have to look through every job and compile all that manually. What I wanna focus on now is this deficiency that was found.

*--- Deficiencies ---*

JOSEPH SUMMERELL

1:06:26 So any sort of issue found out in the field by a technician is going to be documented on the job in which it was found. And so you can always click on details right there. But then depending on your notification settings, you can also be emailed about that deficiency and you can have these go to multiple people.

*--- Deficiencies ends ---*

JOSEPH SUMMERELL

1:06:48 You can have certain deficiencies for certain locations, go to certain people. If you have account managers or CSR or whatever you call them, you can have all these different notifications set up to route to the right person. So straight from here, I can see where the problem is found.

*--- Deficiencies ---*

JOSEPH SUMMERELL

1:07:04 Click on view. The deficiency takes me right into ServiceTrade. So I can see, hey, this is found at costco, on our number one on this PM job. We have related efficiencies. So I can see any other issue that has happened on this piece of equipment, I can see those trends start to build over time as well as the attachments, the picture and the audio that were taken by the technician out in the field.

*--- Quote templates ---*

JOSEPH SUMMERELL

1:07:30 So if I need to build a quote out for this, I click add to quote and create quote. Now, I have a basic quote built out with, the deficiency and the repair quote and all that. But I don't have any parts of labor yet. We do have templates for those. So I can just say, hey, I've got a compressor, a replacement. These templates will be whatever verbiage and standard parts of labor you want for that kind of repair, I can just apply them to the quote and then it'll automatically apply. Of course, I can go in and edit things as I need to. So if I want to control how the pricing is displayed to the customer, whether it's just grand total only or summarized by line on the type, I can do that there, but that will be set typically by the contract. So you can set it all up in the background.

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

JOSEPH SUMMERELL

1:08:17 So you don't have to worry about it. That contract will automatically apply based on location. But then if I go in here and say, hey, this belt and you charge 55 dollars for it. It'll let you change it, but it will flag it to say, the contract price for that 42 dollars. So it will notify you, but it won't inhibit you from doing what you need to do.

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

JOSEPH SUMMERELL

1:08:46 So if everything looks good on this quote, I can go up here and click send to customer and I can select a customer. I'll just send it to myself so I can show everybody what it looks like. I can select the different pictures and audio memos that are a part of this quote and send it on. So to get that approved, it will show up in the customer's inbox... quote for cosco or quote for repair. Cosco wholesale is ready for your approval. It'll talk through a brief description of what it is. And then they can click on view and respond to quote. This will have your individual logos. We can have all your different brands in here to populate. And then a big green approve button or a request changes button, something to note before I click approve is down here at the bottom, you have your audio memo and your pictures to really show the customer what it is, that is happening at this site.

*--- Quoting ---*

JOSEPH SUMMERELL

1:09:44 I can click on that and, that's a good high resolution picture rather than just a really grainyone. Another thing to note here is since I just viewed that quote... I got another e-mail. This is as the administrator in ServiceTrade. I can see, hey, that quote is being viewed. So if it's a larger project or something that you really want to talk through with your customer, you can have those view notifications flow into your e-mail and if you're in front of your computer and they happen to be looking at it, what an opportune time to call. Now, back on the customer's perspective, I can click approve. I can type in a po for that. And then I can check terms and conditions and approve that quote. So now I get another e-mail saying, hey, the quote has been approved... and we're good to go. So back in service trade, when I click refresh here, a couple of new buttons have shown up because this now says approved and I can either create a job from the quote or I can add it to an existing job. If I'm going out there next week for something else. Anyway, might as well tack this compressor replacement on something else. I'll also keep up with a full history of these quotes from when the issue is found, when it's approved, who approved it, all sorts of things like that. Anybody have any questions on that?

JOSEPH SUMMERELL

1:11:23 Cool. So, one of the things I forgot to mention on it is all the reporting that goes along with it. If I am looking at a quote report, I can say, hey, show me all of the quotes that have been sent to the customer and not viewed by the customer… since we're tracking those views, I can filter that down and then say, hey, on bulk, select all of those and resend them to the customer, getting back at the top of their inbox, or maybe if they're not being looked at, maybe I have the wrong e-mail address for that customer, the wrong contact and I need to figure that out. The other thing you have here is a deficiencies report, so I can look at all of the issues that have been found this week but not yet been quoted out. I need to figure out why my team is not sending those quotes because this theoretically should be low hanging fruit.

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

JOSEPH SUMMERELL

1:12:09 These are, these are issues at the site that our technicians found that we should be able to go, win that work pretty quickly.

JOSEPH SUMMERELL

1:12:22 Any, any questions on that?

JOSEPH SUMMERELL

1:12:29 All right. Then let's go back to the job we were on. We'll build out, our invoice for this. So we have a couple systems of checks and balances that you can use.

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

JOSEPH SUMMERELL

1:12:45 When you complete a job, you can either complete it and then create that invoice in two different steps or you can do it all in one step depending on how you want your workflow, to go. So I'll do it in one step, it'll check all the parts and say, hey, do you really want to create an invoice from all 14 items and I can click that right here.

*--- Invoicing ---*

JOSEPH SUMMERELL

1:13:04 Now. If I want to do a partial invoice, I can do that. I can send 10 invoices for the same job if I want to. I can also just do one line item as a deposit if you're doing a deposit for, a small project or something like that. So I'll create an invoice for these?

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

JOSEPH SUMMERELL

1:13:25 Looks like I'm missing some pricing rules in here because I am losing money on this job. All right. That's the one in the box of stuff. I didn't have a good mark up rule for that. So I'll put 1,500 dollars on that. That should be good. Yeah.

*--- Invoicing ---*

JOSEPH SUMMERELL

1:13:40 So now my gross margin is up around 34 percent rather than negative 11. So this is the point where we can either pass this invoice as a as an Ar invoice over into spectrum and you can send it out of there or some folks are sending the invoices directly out of service trade because it's a good, moderate intuitive feel for the customer and they can get them out quicker.

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

JOSEPH SUMMERELL

1:14:08 So if that invoice gets sent out of service trade, it'll look a lot like this flows into the customer's inbox, they click on the link and they can have pay now, but that can also be hidden. You can hide it completely or you can hide it for certain customers.

*--- Invoicing ---*

JOSEPH SUMMERELL

1:14:23 So only certain people have the pay now option or you can create pricing rules around it or I guess invoice totals rules around it. So if it's over 5,000 dollars, I do not want to accept online payment, you can set that up in the background. But for something that's like this, makes it easy for the customer to pay. And then you can pull in your accounts. Receivable. One of the really valuable things about invoicing out of service trade is this go to service details button. It can house all the information from the job because generally the person paying the Bill, they weren't on site. They don't know what you did.

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

JOSEPH SUMMERELL

1:15:02 They don't know the value of what it is your technician did. So you can click on as the person paying the Bill, click on, go to service details. And it takes you right back into that service link we were looking at earlier with all the details about the job that was performed.

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

JOSEPH SUMMERELL

1:15:23 All right. So that really covers invoicing. So now I've got left on my list time card, some reporting. And then looking at a project, I'll touch on time card real quick. But when it comes to reporting, what are some of the most important reports that you would be looking to get out of your service platform?

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

CHRIS

1:15:54 Estimate versus actual would be a big one especially on quoted jobs.

TIFFANY

1:15:59 Okay.

CHRIS

1:16:03 And then the other thing... that is service contracts, a quick view at all your service contracts, actuals... that as well.

JOSEPH SUMMERELL

1:16:16 Gotcha. All right. So let's actually start with that. We've got this is our reporting tool.

*--- Quoting ---*

JOSEPH SUMMERELL

1:16:23 We use Amazon quick site. You can use all sorts of different reporting tools, Microsoft PowerBI, that sort of thing. It's really just a data visualization tool. So here, I'm looking at a dashboard called the boost revenue dashboard. We can track like jobs with efficiencies, how many of those were quoted out, and quote approval rates, that sort of thing.

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

JOSEPH SUMMERELL

1:16:43 So you can look at more operational data. Now, if you are looking at, I think the account manager one has what we're looking for here.

JOSEPH SUMMERELL

1:16:56 So, for job or contract profitability, for instance, this is one of those reports that we can have built out for you where you have actual revenue versus actual cost expected versus actual margins, things like that. See job profitability, yes, sir.

CHRIS

1:17:15 Sorry to interrupt. So it won't happen in service trail, be, have to be built out into another reporting device.

JOSEPH SUMMERELL

1:17:23 So we'll show, the individual contract within service trade, the profitability of that. But if you're looking at it as a holistically then, yeah, that's just, it's simpler to do, in a tool designed for that data visualization. Adam, do you have anything to add on that?

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

ADAM

1:17:44 No. The, the tool that we're using for reporting is incredibly powerful and can pull together a lot of different types of stuff. So that's why exactly what Jay said, is right?

JOSEPH SUMMERELL

1:18:01 Essentially, it's a way to give you a lot more information and make it easier to use because we don't have to go reinvent the wheel?

CHRIS

1:18:09 Got it. Thank you.

ADAM

1:18:13 About that reporting engine. Is that what we show our kind of our attempt, or our dashboards of what we think most customers like. Often, what happens is that, those kinds of standard or stock reports get modified heavily to meet your custom needs?

JOSEPH SUMMERELL

1:18:36 Yeah, that's a great point because that's another reason we do things out of the outside reporting tools is because there's a whole lot more customization.

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

JOSEPH SUMMERELL

1:18:45 Everybody every company wants to see different data and it's not going to be standard across our entire customer base. And it does, they can do some pretty slick things. Like if I'm looking at this whole company, I can collapse things down and look at, the revenue cost and margin across an entire company I'm doing business with. And then if it's looking really bad like this, a solutions negative 83,000 percent margin, I can pop that open and really drill into exactly which one of these jobs I'm losing all that money on.

JOSEPH SUMMERELL

1:19:26 All right. So if there's no more questions there, I'm gonna jump to our time card.

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

JOSEPH SUMMERELL

1:19:30 And then Adam, I'll hand it over to you to touch on kind a like a brief overview of our project stuff. So the service time card is going to look at, let me find one. That makes sense. I think Brett was a good one. I've looked at the other day.

*--- Tech time tracking ---*

JOSEPH SUMMERELL

1:19:48 So this will take all the data from service trades, clock, events, or labor items, and compile it into essentially a digital time card.

JOSEPH SUMMERELL

1:20:06 It'll have the hours that were worked on which day and then all that will be hyperlinked to the job itself. So if you, if something doesn't look right, maybe somebody has 14 hours in a day on one job, they might have gotten to clock out or typed in the wrong number. You can click on that it'll take you right into service trade to the job in which it was performed on and you can go in and really find, the root cause of the incorrect time. If they need to add sick time, pto, time, things like that. A technician can do it in here.

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

JOSEPH SUMMERELL

1:20:41 And essentially, they'll need to come in here just once a week. It'll kick them a notification and say, hey, you need to review your time, tell me that it looks good. Once the technician reviews it, then it can kick to a manager. They can review it and say, yes, this looks good.

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

JOSEPH SUMMERELL

1:20:54 And then all that can be passed over to, your payroll system at the end of the week or whenever you need it to be.

CHRIS

1:21:01 Is this in the app or is this a separate website?

JOSEPH SUMMERELL

1:21:06 This is, I mean it's all in the same ecosystem. It's time car, dot ServiceTrade, dot com instead of app, dot ServiceTrade. Dotcom.

*--- Tech time tracking ---*

JOSEPH SUMMERELL

1:21:18 I can tell that there's some hesitation in the amount of different or the amount of different apps or websites that we're using. The reason we do this, the reason we have multiple different places for data to be housed is simply usability. Whoever is reviewing time card data for payroll is generally not the same person that is either generating a po or something like that or the dispatcher may not be due running payroll.

*--- Tech time tracking ends ---*

JOSEPH SUMMERELL

1:21:51 It really simplifies things to have them kind of in their own space. Now, it's all built by the same folks. So it's you can use the same log INS. You can, it all communicates with each other, but it's, it feels like it's one cohesive platform.

CHRIS

1:22:15 The only reason I asked about that is because simply just keeping it as easy as we can for the technicians, because I mean everybody that's in the trades understands it's hard to get them to do their paperwork in the first place. So the easier we can make it the better.

JOSEPH SUMMERELL

1:22:28 Yup. I get that.

JOSEPH SUMMERELL

1:22:36 Cool. Well, Adam, I will hand it off to you to talk a little bit about projects.

ADAM

1:22:45 The word thing... all right?

ADAM

1:22:53 So we spent a lot of time looking at service trade jobs and kind of how they're laid out attachments and clock events, and job items projects are, very similar because it's built on top of this job infrastructure with some extra extended functionality to help manage a job that's you know, multiple months a year, that sort of thing.

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

ADAM

1:23:23 So we're looking at a project right now and, it's a little bit of an older one. We're only 10 percent of the way through it even though we have eight days remaining. But right up in this top corner, we have a percent complete start and do by dates, we've got some budget information that's unique to project and we have... some performance data to show our total incurred cost versus total invoice, some really nice high level bits of information on there. So I'm gonna scroll down just so that we can see how a lot of this is still very familiar. We have the different phases of the project similar to how we were doing services. Where we have phase one is complete. Phase two is in Progress. Phase three hasn't started yet. And then grouped by these phases, we have the job items, so parts, labor, materials, rentals, fees, all sorts of stuff like that. We can see that this overhead crane rental that's been received, but the chiller that hasn't been received.

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

ADAM

1:24:32 So this is, you know, the, this is something that, we definitely are expecting this invoice but we haven't received it yet. And then clock events, comments attachments, those would all show up here. So when we look at our budget, this is kind of, the key part of what makes, the project unique.

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

ADAM

1:24:57 We have a breakdown of all of the different types of items on the job and what I like to call the exploding doughnut. And we have the overall value of the project with our estimated margin and how we're doing notice that this budget is locked. So I've already built it out and I've locked it for further changes.

*--- Quote templates ---*

ADAM

1:25:18 But it's built out of the same items that you've seen on the service trade job. In fact, I don't have to type this over and over again. I can build out a quote, have that customer approve the quote and then turn that into a project, use, the items that were on the quote go on the job, go on the budget.

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

ADAM

1:25:41 And then I can tweak these things here. So we've got our unit cost extended. And then the price is coming from that contract. So Jay showed you all the different ways that you can create mark up rules for your parts and labor. These automatically get applied here so that you can see your margin and go through, and just really price everything out.

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

ADAM

1:26:03 So with data set up the right way, this thing can be built out with one click. And then of course, it can always be edited. Let's see I have a couple of different check boxes here and some little stars next to these numbers. I had a change order that was sent out to my customer and then approved.

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

ADAM

1:26:25 And so previously, neither one of these items were in the budget or on the job and I clicked create change order edited. You know, you can edit and add or remove items right here. And then I'll show you what that looks like. You can either send that change to your customer for approval or if it's just a small clerical change that isn't going to affect the projects, you can make an internal change order... change orders function very similarly to quotes in the sense that you have the document, you get all of the approval status, send the e-mail out to the customer, see if they've reviewed it.

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

ADAM

1:27:10 All the things that Jay mentioned before. If I open this up, it has all the nice branding and formatting that we're used to seeing. So this would be your logo here. We can see that I was actually the person that approved this quote, but this would be your customer name, the date that they did it. We can see some of the, some of the comments on the parts. I added, what that's going to do to the project and then what that's going to do to the total overall terms and conditions, all the same things that we've seen before.

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

ADAM

1:27:47 So this is a great way to have a budget have the plan and then be able to change the plan and involve the customer in that journey.

ADAM

1:27:59 The other thing that we have, we've got this nice little high level performance view, but we can dive into this a little bit more and this is going to show us how we're performing against the budget in more detail. So, you've seen these first two rows before, but now we've broken it out into materials, labor hours, how we're doing with the margin versus what we were planning. And then right here, I've got the three phases. I've got some Bright red text here to show me that in fact, I have gone over my labor estimates.

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

ADAM

1:28:35 If I flip this from dollars to quantity, I can see I have four more hours of hvac labor than I had planned for. And so using this, I can then dive into the comments into the attachments. Maybe the, you know, the technicians have likely already included documentation on what's going on and, you know, they're telling me through the service trade mobile app.

*--- Assets ---*

ADAM

1:29:02 I can see this in my report and then I can go into the job and I can filter based on particular date, maybe, you know, this past week or let's look at last month. This is going to drill down the entire view because, these projects, they can get big and there can be a lot of attachments and photos... and line items.

*--- Assets ends ---*

ADAM

1:29:29 I now have only the items that were used on the previous month. Same thing with all these other sections. So it's really easy to drill down into the little bits of data to see what's going on, what's being done, what might be going off track? If there are problems, I can catch them early right here on this project page.

*--- Access to information ---*

ADAM

1:29:56 And then I mean, much of what we've already shown you in terms of how a job works is still true here. So the technician doesn't have to learn two different ways of working things. They're already used to the service trade mobile app. They're used to clocking in and out.

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

ADAM

1:30:13 They're used to adding job items. And, you know, the fact that this is a project versus a service call for the technician, is just kind of neat to know it doesn't really affect their day to day. So, you know, this is where building on top of an already really solid platform for service work and extending it for that product functionality has been really helpful in that area.

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

ADAM

1:30:40 Remove the filter... and then invoicing, same thing that J showed you that doesn't change as well. You can send multiple invoices. So I already have the one for the project and this is how I'm able to compare the incurred cost versus my invoicing. This is all the same that you've seen before as well. That's a very brief intro to project management. One of the other things that sometimes I like to get into since Jay had talked about reporting, is that, okay, it's really good to see this high level stuff on a per project level so that you can dive into the details. But through the reporting engine that we talked about before, you can look at your entire portfolio and see how they're tracking, you know, how your cost versus your invoice versus your budget, all that detail across the entire portfolio for all of the projects that you have going on at that time.

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

ADAM

1:31:48 Any questions about projects?

ADAM

1:32:02 Okay, great. As Jay mentioned a lot of the stuff that, you know, whether it's projects, or other parts of the application are constantly in development and being improved based on customer feedback, everything that we've shown you today is live and we have, you know, a 1,000 over a 1,000 customers doing all this stuff today. And so we get really good feedback, good partnerships with customers really pushing the envelope and are constantly improving it.

ADAM

1:32:43 Awesome.

CHRIS

1:32:43 Thanks Adam.

JOSEPH SUMMERELL

1:32:44 Well, everybody, if there aren't any more questions, really appreciate your time. If you think of something like I do after a meeting that five minutes later, I think it's something I could have asked. Send me an e-mail if you don't have it already, it's Joseph summarel, at ServiceTrade dot com. I'll drop it in the chat or you can send that through, the team at creed.

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

CHRIS

1:33:10 The only other question I think of real quick is I have customers that issue standing POS for, you know, let's say it's 100 different service calls, right? But it's a 50,000 dollar standing po. How do you guys manage that?

JOSEPH SUMMERELL

1:33:24 Yeah, you would just attach that po to like, the contract within service trade. So you can understand hey first 50,000 dollars used gets tied to this po.

CHRIS

1:33:36 Okay. So they also issue a po for the PM agreement. So it's one po, but then I have another PO, just for TM service calls you have that ability to wear, like when I generate the TM service calls that po pulls in.

JOSEPH SUMMERELL

1:33:54 Yes, sir. So we do that by the different job types.

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

1:33:58 So within a job, you can make it a project, you can make it a maintenance preventative maintenance job. You can make it a service call, emergency service call, all sorts of different titles on it. And then you can tie a contract within service trade with that po attached to a specific location and type of call. So, any repair job at costco falls under this contract, but any PM job at that same cosco falls under a different contract.

CHRIS

1:34:30 Okay. Makes sense. Thank you.

JOSEPH SUMMERELL

1:34:32 Yes, sir. Yeah. Keeping up with those is a pain from what I've heard from our customers.

CHRIS

1:34:41 It can, they were...

JOSEPH SUMMERELL

1:34:42 Very thrilled when that came out. Yeah.

--- *Recurring maintenance ends* ---

JOSEPH SUMMERELL

1:34:49 Cool. Well, I won't take up anymore. You all time today. Really appreciate it. If you think of something, send me an e-mail or send it through the care team?

CHRIS

1:34:58 How's your?

JOSEPH SUMMERELL

1:34:59 Business appreciate it?

CHRIS

1:35:00 Much...

ADAM

1:35:02 Thanks, everyone.

JOSEPH SUMMERELL

1:35:03 Take care.

*The End*