ServiceTrade Demo with Geopfert Company

Quinton Stallings with Geopfert Company
Recorded on 11/10/22 via Zoom, 1 hour 19 min.

Participants

ServiceTrade

Quinton Stallings
Territory Manager

Chuck Dunham
Field Manager

Will Scott
SDR

Geopfert Company

Jacob
Operations Manager

Other

Jeff Amundsen

Topics

Transcript

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

QUINTON

0:01 Hey, Jacob. Can you hear me?

JACOB

0:03 Yeah. Can you hear us?

QUINTON

0:05 I can hear you. How are you guys doing today?

JACOB

0:08 We've got to Drew. He's an inside sales guy that we've got Jeff, who was an account manager and jeans is the treasure in the room right now?

QUINTON

0:19 Hi, it's so true, Jeff and Jean.

JACOB

0:22 Yes.

QUINTON

0:24 Awesome. Well, thank you all for meeting with us today. My name is quit installing on the inside territory manager here at service trade. We've also got Chuck done. I'm here with us. He's the outside representative for you guys area in Ohio.

CHUCK

0:39 Hi guys.

JACOB

0:40 Hello?

JACOB

0:41 Hello?

CHUCK

0:43 I'm just a neighbor of yours actually up in a broad view heights.

JACOB

0:47 Nice. Yeah, not too far.

CHUCK

0:49 Yeah.

QUINTON

0:52 Some. And how do you guys pronounced that? The name of your company? Geopfert?

JACOB

0:57 It's actually is get for.

QUINTON

0:59 Get burnt, got.

JACOB

1:00 It, it's a hard. Gee, it's kinda different.

QUINTON

1:02 Cool. Cool. Well, the plan that we had for our, for us today is the first, just learn a little bit more about you guys over at gut for we went to learn about, you know, what you guys are currently using for your software, what type of work that you guys are doing? And then most importantly, some of the areas you might be looking to improve on with service management software. After that, we will give you some background about us here at service trade, who we are, who we work with. And then we'll take a tour through the platform at the end of service trade. Looks like a good fit. We can talk about next steps. How does that sound?

JACOB

1:35 That's good.

QUINTON

1:38 Perfect. Well, I've got some notes from your conversation with will. It sounds like you guys are 100 per cent commercial mechanical company doing work on H fac, boilers chillers, I'm doing some reactive service and preventive maintenance, also small amount of Construction with 16 service techs.

JACOB

1:58 Yeah.

QUINTON

2:00 Perfect. And the software you guys are currently using is perfect. Where, with a mixture of like excel and word as well for quoting?

JACOB

2:09 Yeah, excel word for quoting? Yeah.

QUINTON

2:12 Okay. We, can, you guys kinda tell me how you guys are using? Perfect. Where, and what are some of the things you've been running into that Scott, you're looking in other directions for?

JACOB

2:23 Perfect. Where I mean runs our business that Scott all of our dispatch software, all of our PM agreements, purchase orders, project management, service calls. I mean, everything is in there. As far as issues are running into with it. I just feel like the there's other software companies out there. That just seems much more, I guess you could say advanced or streamlined user friendly than what we're currently using. Sure. Yeah, I'd say big thing to our tax out in the field. I mean, the platform or on it's so hard for them to navigate that they don't use it. So we're looking for something just a little more simplistic.

QUINTON

3:06 Okay. It's something easy for your technicians to use when they don't use it. Are they filling something out on like paper or are they calling things in? How does that work?

JACOB

3:16 Like at the end of the day or the end of the week for something? Because that's how they get paid right there. It's cumbersome, this clunky, like for the, they call their web tech, which is like their field mobile device.

QUINTON

3:31 Got it. Got it. Okay. And they're dropping or they're filling those work orders out at the end of the day or end of the week? What's how long does it typically taking you guys to invoice out to your customers?

JACOB

3:43 We always build this week for what was done last week. So like today, and tomorrow, I'll send out an invoice for everything that was done through last Sunday.

QUINTON

3:54 That's something that you guys are looking to speed up as far as getting those invoices.

JACOB

3:59 It's not a priority. It'll be nice just to get the money and faster, but it's not an issue that it's five, six days behind. Sure. I guess it could be up to 10 days behind depending on when we were there.

QUINTON

4:12 Got it. Got it. And then... ease of use. And then you guys are using Quickbooks. Correct?

JACOB

4:20 Yes.

QUINTON

4:21 Awesome. So we have a native integration with Quickbooks. So it's great that you guys are using that for your preventive maintenance? You mentioned you're tracking those currently imperfect, where, how is that been working for you guys? Is that something that's easily tracked? Or is that something that's more of a manual process for you to keep up with?

JACOB

4:41 Hi, this is pretty easily tracked. We don't have each piece of equipment like it doesn't generally like a call for each piece of equipment because we originally set it up like that and it would, you gets reams and reams of paper time and it was a waste of time. So, we just did one call for each building.

QUINTON

5:03 Okay. That makes sense. And when your techs are out there on those PMS, I'm sure they're finding repairs that need to be quoted. Is that something you guys are quoting in the office for?

JACOB

5:14 Typically, yeah.

QUINTON

5:17 And what Scott you guys quoting out of excel and word, is that just this page perfect. We are not allow you guys to do that or is it just an easier process that way?

JACOB

5:27 It allows us to do it. It's just for me. After using it. It's just easier to do excel and word. I've been doing it for a long time and it was just a just an easy.

QUINTON

5:38 Yes.

QUINTON

5:39 Okay. Got it. Well, cool. Chuck. Did you have any questions in regards to their processes?

CHUCK

5:47 Yeah. I guess I'm wondering, are you actively looking to make a change or are you just kinda looking at what's out there in the market right now and maybe where you are in the process?

JACOB

5:57 No, we actually signed to go with a company called BuildOps last year ended up opting out of it during our opt out clause period.

CHUCK

6:07 Really, what happened?

JACOB

6:10 They quit responding to text there to emails trying to get clarification on things and... just didn't have a good feeling about the time. Well, we have talked to them again. And now we're talking to you guys as well.

CHUCK

6:25 Okay. Yeah. It's something I've heard a multiple times from build up some customers that the, they took them forever to get implemented. And there was a lot that just wasn't there was promised but never delivered. So, I don't think you're the first one that I've heard that from for sure.

CHUCK

6:48 Question for you. When you're do you track pull through work or, and what do you call it? Do you call it deficiencies or how do you, how do you manage that?

JACOB

7:04 What do you, what would you say folder work? Are you talking about just work that was done on PMS or just additional work from home?

CHUCK

7:11 Let's I'll give you an example in Q. Well, I call him, he'll show you this. It, let's say your tech is out working on a job and after they're done or maybe during the job, they spot something else that needs attention. Maybe it's not completely broken. Maybe it's trying to work and maybe it's whatever it is. They find something else that needs attention at that customer location. Do you track that? Do asked the text, find that type of stuff? Do you, do you have a way of tracking it? You have direct way of quoting it. Just wondered what your thought is around that we call some people call it pull through what we call a deficiency.

JACOB

7:59 I mean, if our tags that are out there and they see something else on a different unit, they probably bring into the customer's attention and they want us to move on it. We call them spot calls is just a service call. We would open up a new service call and then build on a different call number. I don't know if that's what you're getting an?

CHUCK

8:17 Yeah, you know, different people handle it different ways. Some people will try and fix it right then in there if they can. A lot of our customers have a formal process around tracking it and quoting it. And, you know, the idea is not letting any of those slip through the cracks because the thing is it's better for the customer if you can keep them up and running, of course, 100 percent of the time, right? And in the end, it's more revenue for you to find that kind of work. And some of our customers are getting major revenue out of that one thing. And so I just one, yeah.

JACOB

8:56 We, I mean, we already do, we already do that. So, yeah, I mean, we don't have like a formal thing that says this guy had 17 pull through experiences last week, but when they find something is brought to the attention of quoted should be okay. Yeah, I don't really think that that's related thing we're lacking right now.

CHUCK

9:20 Okay. Well.

QUINTON

9:22 Then it's probably a good idea just to, for us. We'll give you a high level overview then of service trade today, we'll make sure that it's first a good fit for you guys is business. And if you have questions while we go throughout the platform, you know, feel free to interrupt me, interrupt, Chuck. We like to keep it more of a conversation. That way we can get those questions answered for you. Does that sound like a good plan?

JACOB

9:41 That works?

QUINTON

9:43 Perfect. Well, I'm gonna go through some quick slides and then we'll jump into the platform. So service trade, we were specifically designed for commercial service contractors. You know, we are starting fire and life safety and branched out into mechanical with HP, AC, refrigeration, chillers, really, everything involved in mechanical contracting. But, you know, we work with companies that have as small as three technicians all the way to companies with 300 plus. And our goal is simple, it's to help commercial service contractors be more valuable to their customers and turn, help them grow their business. And we can help you guys do that in three primary ways. So, the first and foremost is operational efficiency basically put by streamlining your service creations, helping you guys organize your customer data into one centralized location. We help you get the most out of the current resources that you have today. The second it's about maintaining expanding your current customer base. There's a lot of platforms out there that handle work orders and scheduling and dispatching, but none of them really focus on the customer experience. So service trades, may I help you guys enhance that level of customer experience through things like interrupt notifications, you know, quotes that can be approved with just the click of a button, invoices, that can just click on a pay now button all the way to a customer portal where your customers can log into your website and see things like service history or quotes that needs to be approved. I'll just to improve that customer experience. And then third and perhaps most significant way that we help our customers grow is through our quoting features. So we basically make it really easy for your technicians to record repair opportunities out in the field, we then make it easy for you in the office to turn those repairs into quotes. And then even easier for your customers to approve those quotes. Right now, service trade users, they're experiencing on average 23 point four percent increase in service revenue per technician each year. So before we get started, is there any questions about those slides?

JACOB

11:51 Hello?

QUINTON

11:53 Alright, awesome. So we're gonna look at three different views of service trade today. The office view, the technician view, but then also what your customer would see on there. And we're going to start in the office of service trade. And what you're looking at is the service dashboard. So think of this is just a high level overview. When you log into the office, it's basically going to lay out the different stages of your workflow. So for starters, you have the daily schedule, just where everybody is. You can see your technicians here on a map. You've got overdo jobs without appointments. So this is one way to make sure that the type of pins or recurring services that you as might have aren't slipping through the cracks on you and your remind to get them on the calendar. We have jobs without appointments do in the next two weeks. So everything that's upcoming... we have pass jobs to be marked complete. This is simply when the technician has completed their work order out in the field, it will show up here in the office for you guys to review, make sure everything looks good on that work order before you invoice it out to the customer. And then lastly a completed jobs to be invoice, a final reminder to invoice out those jobs. So any questions here about the service dashboard? Pretty straightforward?

JACOB

13:13 It is, yeah so far?

QUINTON

13:17 The next thing that we have here is how your customers and locations would be organized and service trade. Given the fact that you guys do 100 per cent commercial, you probably have those customers that have the corporate headquarter, and then you service different locations for them, right? Awesome. Well to illustrate that we have the long horn steakhouse here, the headquarters page. But we're responsible for servicing three different physical locations and each of these locations has their own in particular page or all that information for the one site is going to live. So here at the longhorn steakhouse and Michigan, we can see things like the contacts here. So I made you guys submit the management crew of a long horn steakhouse today. On the location page, you can see things like your services. So these can be one time services.

JACOB

14:12 Or...

QUINTON

14:12 Your repairs, and as you complete these repairs, they're going to disappear here from this section and they're going to go into your job history. But this can also be where you set up your recurring services, your PMS. So setting these up is really simple. You're doing it once just by clicking on a asset or a piece of equipment that you're going to be servicing. You'll give it a description. Any preferred technicians that you always want, completing that service or maybe you have texts that are skilled in one particular labor, estimated price estimate, duration here for scheduling and job forecasting. Then lastly is how often is it going to recur whether it's on a quarterly, semi, annual or annual basis? You'll be setting this up one time and it's really on a rolling clot from there. So it's gonna save you time from recreating this, but also reminding you to get this on the calendar. Any questions about that?

JACOB

15:16 Well, we don't do it right now. Do we buy pieces of equipment?

JACOB

15:20 No, we don't currently do... back to their system. It was easier to do it. This is really nice.

QUINTON

15:32 Yeah. So, are you guys doing it by like the customer right now?

JACOB

15:35 Yeah, right now.

QUINTON

15:38 Awesome. Gotcha. Okay. Yeah. Yeah. Basically, you'll have your customer page now here and then all of your pins instead of just being for that one customer would be for one particular piece of equipped?

JACOB

15:48 Yeah. How does the text out in the field, the PM system emailed to them when they sign in the portal?

QUINTON

15:57 Yeah, great question. So once it's scheduled to that technician, L emailed them with a notification saying they have a schedule update and it will also go directly to their calendar on their devices.

--- Next Steps ---

JACOB

16:08 Okay. Yup. So would they be able to see all of their open PMS on schedule or reschedule? This is like something you go ahead. Technicians have pretty free rein on where like Joe, it's not a real says that set up in advance like scheduled out for the month or anything like that way, like if there's weather. So tomorrow's supposed to rain all day, they can go through and find the places inside and they can go there tomorrow instead of being scheduled to work on a refund, rooftops, all the.

QUINTON

16:43 Nice. So you guys kinda give them a list of what they can knock out the pending on how their day is going or where they're at. Yeah.

--- Next Steps ends ---

JACOB

16:50 Yeah, they do. I mean, they have their book of work but it shows up in their other field device as well. So they can just kind of scroll through and find that person. We don't handle a paperless everything.

QUINTON

17:04 Yeah. So you're going to have the option, you know, you can schedule these out with a specific day or time, but you can also give your technicians basically available jobs that they can knock out as needed and I'll show you how they can easily see those jobs either on a map or they can sort them based on, you know, the nearest job that's closest to them, or, you know, highest priority or what's do soon and things like that.

JACOB

17:28 Okay.

JACOB

17:33 The...

QUINTON

17:34 Next thing we have here are your job history. So you can see, you know, all the work orders in the past of who was there and what happened. We can see the assets at this location. So we've got, you know, a boiler, got a rooftop unit, a walking cooler, but all of these assets has their own in particular page that you can click into and you can view things from the service history to the details of that asset like make model serial number information, all the way to attachments, whether it's a picture or a video, anything that you would find valuable to attached to that asset. It's available for you in the office, but also your technicians out in the field.

JACOB

18:16 Good question. So when a text doing a PM and Saturday, do rooftop one, do they do the whole PLM and writing up on their work ticket? Or do they have to do by piece of equipment? So they would say like rooftop one, I know change filters to this or can they do that all at once and concluded and all the equipment? Or do they have to do it individually? My piece of equipment?

QUINTON

18:39 It's it's kind of up to you guys. If, you know, if you have a rooftop that has, you know, 20 rooftop units out there and you don't want to do one for each individual unit, just maybe like the entire group, you can make it a rooftop unit group. And so they're only having to do that one time for all of the units on that roof. Okay? That answer your question?

JACOB

19:00 Yeah.

QUINTON

19:01 Cool. The next thing we have here or deficiencies, so we can see anything that's open that needs to be fixed or things I've been fixed in the past... any quotes that have been approved or maybe they're still in draft... contracts, any markup rules that you have for different customers for pricing or parts. You have comments, these are locations. Terrific. Maybe it's an alarm code to get into a building or, hey, every time we go out to this location, we need to bring us all latter. But every time that you make a work order for this location, these comments are going to transfer over to that work order. That way your technicians, you know, have those comments there and they're not having to keep that information in their heads. And at the bottom here or attachments, this can really be anything that you find valuable for this location, whether it's you know, a map of the building or, hey, here's a manual and how to operate on pieces of equipment, that site?

JACOB

20:15 Perfect.

QUINTON

20:18 Any questions about the location?

JACOB

20:19 Page? Well, I have a question about when Jeff asked about if you can put like all rooftop units that you worked on?

JACOB

20:28 Tracked by?

JACOB

20:29 Individual pieces of equipment, where does that data? Does it automatically go to all of the pieces of equipment? Or... does it just go to a general place where the detailing?

CHUCK

20:39 No.

QUINTON

20:39 That's a good question. So, you would have a rooftop unit group that would say like maybe rooftop unit group with 20 units. And then under that rooftop unit group would be 20 individual pieces of equipment. So you can still keep track of like no, your service history or things per piece of equipment on that rooftop, but they're only completing one service of those 20 rooftop units at that location. So they won't have a work order of 20 different services that they have to complete each service as they go throughout the work quarter.

JACOB

21:11 No. What if you call up one of those rooftop units, does it showing you that the service happened? I mean, does that go to every one of them are just sits in a bucket and the rooftop units. So you have to look there and then look at the equipment for maintenance... each of those?

QUINTON

21:29 Yeah. It will show you under the actual unit that a service was done for the rooftop unit group. You just, we'll have to complete that service for each in particular unit.

JACOB

21:40 Okay.

JACOB

21:41 Do you make one for the whole group? And then our text working on rooftop six? He clicks just a rooftop six that will group one, you may show up in the rooftop six.

QUINTON

21:51 That's right? Yup.

JACOB

21:52 Okay. Okay.

QUINTON

21:56 When you guys are filling out, you know, or when you guys are completing these PMS, are you completing some type of maintenance checklist for each individual unit?

JACOB

22:06 No, it's a feature it has, but we don't use it.

QUINTON

22:09 Okay. Just was curious.

QUINTON

22:16 Any other questions for me?

JACOB

22:21 No.

QUINTON

22:23 All right. Well, the next thing that will have here is the work order. So basically, this is what the work order is going to look like for the office. We've got the Bill to ship to information at the top here. We've got the services that we're going to be performing. So I've got us doing a refrigeration unit as well as a HV AC unit. If you have additional technicians, you know, I've got myself here on the job. We've got Chuck. But if we want to add additional text, we can do so. And down here at the bottom are going to be the parts labor an items needed for this job. Your text can also add these parts themselves out in the field as needed. And then lastly, we keep track of time and service trade in three main ways. We have in route, which is their travel time onsite their time, they're actually working, and then job preparation, if that's something that you want to track. But everything is based on their clock events. So as they clock in and clock out of these jobs, you know, we can see here. I'm 620 Miles away from this job sites. So I've got a ton of windshield time before I get there.

JACOB

23:29 So, can they override that like for the time entry, just put like four hours instead of using just clock in, clock out. So there.

QUINTON

23:39 For their clock events are going to be internal, they don't have to use them besides they have to clock into the job, but, you know, if you're talking about what you're going to build a customer, they can put in exactly what it's meant to be built, the customer themselves on the work order?

JACOB

23:54 Okay.

QUINTON

23:56 But this is something the customer won't see.

CHUCK

24:00 Okay.

JACOB

24:06 Alright. So...

QUINTON

24:07 Let's go ahead and go out to the field. I'll show you what the technician see and this is what the mobile app looks like it works on apple or android devices, whether it's a smartphone or tablet. But today, I've got this March as filtered on by today. So these are only the jobs that we have listed scheduled for today. But as we're talking about, they, hey can go to their list of an unscheduled.

CHUCK

24:31 Hello?

QUINTON

24:33 Sort these by. Yeah, I wanna see all the jobs that, you know, I can knock out that are do soon have a top priority or the closest to me based on where I am geographically. There's also a map here that shows all their jobs available that they can go and knock out as needed.

QUINTON

25:01 Was that kind of what you were talking about when it comes to, you know, your text being able to see available?

JACOB

25:06 Yes, all their VM to just be on the middle tab. They just click on that and you can filter for.

QUINTON

25:12 Exactly.

JACOB

25:14 And schedule. Yeah... what's that look like for, let me go ahead and completed call, several through that on that.

QUINTON

25:23 Yeah. Sure. So, I'm actually gonna click into this work order here. This got the job I have for today. And basically the work quarter has a different tiles of information regarding everything that we just went over on the location page. And at the bottom is their clock events. So I don't know if you guys receive that in route notification that I sent earlier before a meeting. Yeah, but basically, you can come in here and say they can notify the customer that they're on the way to the job site.

JACOB

25:50 Was that email the customer?

QUINTON

25:53 That they have that's the email, okay?

JACOB

25:55 Okay.

QUINTON

25:58 Once they arrive, they can clock out of in route. It's going to ask them if they want to clock in on site and then just click okay and starts tracking their onsite time.

QUINTON

26:11 To get the technician, an idea of the services that they're to perform, they can click into the service tile and they can see, hey, we've got these two for the maintenance jobs on a rooftop unit, in refrigeration unit.

QUINTON

26:28 Down at the bottom, it's going to show them the two pieces of equipment that they're working on for this job. So this is based on the appointment and they can also look at all the low, the piece of equipment at that job site as well. And if I was to click into that rooftop unit, we can see all the service history. We can see deficiencies... any attachments... and then lastly, all the details around that unit.

QUINTON

27:10 Well, let's say, you know, as we are working on that piece of equipment, we did notice a deficiency that we want to quickly log and get a quote to the customer. I can click on that deficiencies tab and say, we found, you know, a broken compressor.

QUINTON

27:28 Service trade is going to allow the technician to describe things in multiple ways. They can take photos. They can take videos that need for reporting audio messages. I'll take a photo here on this broken compressor.

QUINTON

27:49 We'll go ahead and use that... but I'll also recorded audio memo and I'll say something like, hey, we're out here at this job site. I just started this broken compressor here's. The parts that we're gonna need not time sensitive to fix it. We need to get a quote to this customer as soon as possible.

JACOB

28:08 Since inefficiencies.

CHUCK

28:12 Yeah.

QUINTON

28:13 You guys taking pictures of deficiencies now?

JACOB

28:16 Yeah. So what they're doing now is basically take pictures and then shoot me attacks, you know, outside of our software?

QUINTON

28:23 Program.

JACOB

28:23 Is not around through.

QUINTON

28:24 Our program?

JACOB

28:26 They didn't do it, but it's so clunky to get to it by the time it's even worse looking at muzzle just text, you know?

JACOB

28:33 Right.

JACOB

28:33 So, so for these deficiencies, but I, as a sales guy or is our dispatcher where they get an email on these? Or do we just need to go check the?

CHUCK

28:41 And what form?

QUINTON

28:42 Yeah, exactly. So as soon as your technician logs this year, since whoever is responsible for sending the quote out, we'll get an email notification pinging you that inefficiency was found and there's a little deep deficiency details page that it will bring you directly to in service string for me to quote.

JACOB

28:59 Okay.

CHUCK

29:00 Awesome.

QUINTON

29:03 Yeah. So the next thing I'll do is I'll walk and talk through a few quick steps. The first being the severity of this deficiency. So I'm gonna say for now, it's an operable. But they can also suggest, hey, this is just something that's deficient or just have some minor issues that you want to address it to the customer. I'll say that it's an operable brands high, it back to the rooftop unit that we're working on to build out that says service history... and then lastly state that it's a new deficiency. We just found it. So, once I save that's when the notification will come to you in the office, you know, bringing directly here to the work order to get quoted out.

JACOB

29:48 That work order, can I create a po directly from the?

CHUCK

29:51 Or quarter?

JACOB

29:51 If I need to find...

JACOB

29:52 Somewhere?

QUINTON

29:54 You can, yeah. Okay. Yeah, it's something that's in our, and it's called partsledger. So, we didn't plan on showing you the po creation today, but we can set up an additional meeting to go over that.

JACOB

30:07 Okay.

QUINTON

30:10 Here's, the, that deficiency. It's gonna take you to a deficiency details page.

QUINTON

30:22 That page will show you everything that I'm like where the location wasn't the technician found that broken compressor there's, the work order. It's associated with deficiency history and efficiency related deficiencies can be, you know, hey, we found a broken, a lot of broken compressors here at this job site. Maybe it's time to just replace that entire unit... or you can see the attachments here that the technician left... but we can add these to a quotes. And one thing that you guys can create is your own custom quote templates. So, if there's a lot of similar quotes that you sent out repairs for, you can create as many different templates as you like, and just attach these to a quote... loops alone thing.

JACOB

31:08 The quote will have the pictures on there too if you want to include them.

QUINTON

31:12 Exactly. Yeah.

CHUCK

31:13 That's...

QUINTON

31:15 So, you'll get a quote description along with the parts labor and items that are typically associated with this type of repair. But none of it's set in stone. You can come in here and adjust that description as needed. You can adjust the parts labor an items as well. And then service trains getting, gives you a gross margin down here at the bottom on how much you're actually making on this particular job... once it's ready to be sent, you can adjust what you want the customers who are not to see. So, you know, we want to leave that picture on there so we can show the customer how bad that compressor is and why needs to be fixed. But the audio message, maybe we want to leave that off there because the technician out in the field was saying something we don't want the customer to here and we can go ahead and turn that off... and I'll go ahead and send this out to everybody. You don't mind if one of you can pull that quote up and approve it for me. I want to give you guys an idea of what the customer would see on their end.

JACOB

32:17 Jokes...

CHUCK

32:23 Hello?

JACOB

32:30 People are... you know, I guess it goes on here?

QUINTON

32:37 I've got it pulled up on my screen now, so.

CHUCK

32:52 Yeah.

JACOB

32:59 Expensive...

JACOB

33:19 Right.

JACOB

33:25 Proof screen saving.

JACOB

33:32 You would respond?

JACOB

33:39 Now, I'm stuck now because you're kind of, I think I screwed it up. I put a comment in there to see where we go. Yeah?

CHUCK

33:45 That's fine.

QUINTON

33:46 We can walkthrough that, but before we do that, what is everyone's thoughts about the quote?

JACOB

33:52 Pretty nice. Looks really good. If we wanted to make it a PDF attachment. Is that a possibility or is it always gonna be a bottleneck bought the body of the email?

QUINTON

34:04 Yeah. As far as like the quote itself, you would like to make it a PDF attachment?

JACOB

34:08 Yeah, that, does that comes up quite off or people want to PDF, so.

--- *Wrap-up* ---

QUINTON

34:14 Yeah, you can send it either way, so you can send it through service trade to where they can click on that approve button or you can download as a PDF and it's...

JACOB

34:22 Right there? Okay?

QUINTON

34:25 Yeah, awesome. So, it sounds like you guys requested changes. Great. What that will do is it will notify you guys in the office and it will send this quote back into the draft. So that status change from sent the draft. And then down here at the bottom, you'll see in the comments section, need better price. So you're able too adjust this quote as needed and send it right back out to the customer.

JACOB

34:52 Okay. Well, that's pretty nice.

QUINTON

34:57 Yeah. So I'll go ahead and approve it. Then on my end, just we'll say we got a verbal... and you get a history, you know of who viewed that quote?

JACOB

35:12 Yes.

QUINTON

35:13 Jacob requested?

JACOB

35:17 Yeah. Well, then you can set up, will you, that were sent me the quote?

QUINTON

35:23 Yeah.

QUINTON

35:24 Exactly.

JACOB

35:25 Interesting. Okay.

QUINTON

35:29 And once that quotes approved to new button, show up here on the right hand side. One is the create job from quote button. So basically all the information from this approved quote transferred over to the work order. And then there's also an add some existing job. Maybe the technician is still out there. You can go ahead and knock out that repair, say mature from going back out or you can add someone as an existing job later in the week.

QUINTON

36:00 How are you?

CHUCK

36:01 Following up?

QUINTON

36:02 Quotes? Is that basically just, you know, customer like by customer, each one going through there, your email.

JACOB

36:12 You follow up on your clothes? Yeah, if I don't hear from them and they're so, I mean, I'll shoot him an email and say, hey, make sure you guys aren't gonna call.

--- Wrap-up ends ---

QUINTON

36:22 Okay. The quotes report is nice just because it allows you to run a report based on any date range. And you can basically say, I wanna see all the quotes that we've sent out and they reviewed by the customer for the customer, never approve them or, you know, all the quotes that were submitted and not even viewed by the customer. So it makes it easy to just come over here to the left hand side and you can bulk send these out all back to the top of your customers inbox is just to make sure, you know, hey, we wanna make sure you guys got the score.

JACOB

36:55 And anybody would have access to that. So say one of us are on vacation and another sales guy can just go to the quotes status and pull it up.

QUINTON

37:04 Yeah, yeah.

CHUCK

37:05 Anybody that's user?

QUINTON

37:06 And service trade and hasn't seen gonna have access to it. Yeah.

JACOB

37:10 Yeah, it is especially if the parts around our solution is order, the part that says, send me the quote so I can order, ditch Google docs. So... sorry, well, for the quote, send that stuff.

QUINTON

37:26 Did you mention, you know, ordering parts too? Is you have the same jobs report as the quotes, which basically, you can run all your jobs with, you know, parts that need to be ordered, parts ordered, but not yet received parks, partially received, even like maybe unscheduled or incomplete services that we need to go back out there. So it makes it really easy just to kinda keep up with those jobs.

JACOB

37:52 Okay.

QUINTON

37:54 Any questions about the quoting process?

JACOB

37:58 No, it actually seems really strict.

QUINTON

38:01 Fantastic. The next thing we'll do is we'll go back out to the field, enroll, wrap up that work order. So down here at the bottom, we can add attachments just like we did on the deficiency. But this is basically just, you know, if we wanna take before and after photos or there's something you wanna attached to the job, maybe you want to scan in the document or add a photo from the library. You've got all your contacts at that site. So it makes it easy for the technician just to select the contact and call them or email them if needed. Your job items are going to be where tags can add their parts, labor, an items additionally that wasn't already added to the work order. So I can come in here and say, hey, you know, we need to add a widget, and as I'm searching for that part, it will populate it, I can select it and added to the job.

JACOB

38:55 But all that stuff has to be pre-populated they Kansas add something that's not already in the list.

QUINTON

39:01 They can add hawk item as well. I just was selecting one from a list but they can't add something that was new to?

JACOB

39:07 Okay.

QUINTON

39:11 And then do your takes, get signatures for when they complete the work?

JACOB

39:15 Rarely...

QUINTON

39:17 Is that something that you want them?

JACOB

39:18 Hello? Yes. Okay. If you can tell me how to make that happen, we'll sign the contracts with it.

QUINTON

39:25 Well, hopefully this makes it really easy for basically, all they have to do is they can click this button that says create work acknowledgement... they would select the customer that's onsite. So, I'll just select Jacob here. They can review what they want to show the customer before they review it with them. So if they want to click in and say, like, you know, we completed that H back service, but we never got to the other service. They can just, you know, show that we completed that one same thing with the parts or any photos or deficiencies that they want to leave the customer. Bye-bye. When they're ready to review it, they just click on the review button... review this with the customer here's. The services that we did, the parts use, deficiencies that we found... any comments that you want to leave the customer. And when they're ready to confirm and sign... in their signature and a copy, a sense of them along with it's attached to the work order as well for the job history in the future?

CHUCK

40:32 Hello? Does?

QUINTON

40:33 That seem pretty straightforward?

JACOB

40:36 Yeah. Yeah.

QUINTON

40:42 Well, before we go out back to the office saying invoice out this job, was there any other questions about the mobile app before we move on?

JACOB

40:52 Hello. Before they leave the site, they're gonna wanna hit clock out on this.

JACOB

40:57 Yep. Exactly.

JACOB

40:58 Yeah.

QUINTON

41:01 O'clock, out. We'll computer service and finish quantum. Yeah.

QUINTON

41:10 So, back in the office view, we can now see the work order gets changed to completed... here's. The widget that we added from the field. Here are the text clock events of how long they were traveling along that they were on site, and then they're total time... already quoted out the deficiency. And then here's the attachment of the work acknowledgement that we got signed off on by the customer.

QUINTON

41:53 When it's ready to be invoiced. We click on the complete job button, would complete the job and create the invoice. It's gonna give you a section here to adjust your cost as needed. Then the last step is just finalizing the invoice.

QUINTON

42:16 So here, we can adjust pricing as needed. Looks like our gross margins are not the best. So I'll come in here and as pricing to that Bill… it's a little bit better.

QUINTON

42:31 And once I want to send to the customer, I'll click on send invoice link. And this is what the invoice would look like. From the customers perspective. Again, your company logo, you can determine what you want the customer to see here, whether it's brand. So it will only parts with pricing parts in their descriptions. Now that the technician, or excuse me, the customer can come up here and click on a pay now button and they can pay with a credit card or they can pay with an AC. H. But a lot of times, you know, the customer that's paying for the invoice is not always the one that's out there, getting that signature for that completed work. So they can go to that service details section and get a full job summary of everything that the technician did from who was out there, services that were done. You can leave any files you want to. Maybe it's that work acknowledgement that they signed off on in the field. And then any alerts of things that were fixed or things that are broken that needs to be fixed out with you.

QUINTON

43:37 This invoice is also able to sync directly with Quickbooks. So once this is ready to be sinked over, you can click on that send to accounting system button, and this can directly sync over to your Quickbooks account.

JACOB

43:51 Where are you? Keep track of the invoices you receive? Is that done in Quickbooks? Or is that done in the service trade? All of your payments?

QUINTON

44:02 Yeah. So all your, the HR would be sinked over into your Quickbooks account that's where it would be kept, just like you're doing now is for all your accounts receivable?

JACOB

44:13 Okay. Now, is this setup? So just send the invoices out every single day and just kinda Giovanni invoicing continual thing?

QUINTON

44:25 How do you guys? It looks now? Yeah, I think you said that the…

JACOB

44:28 And it's like a weekly process.

QUINTON

44:32 Yeah. So, I mean, you can invoice whenever really you guys would like to, you can bulk send out invoices, you know, once you have them all approved, if you want to send them all at once by the end of each week, you can do so or you can send them out individually. It's really up to you.

JACOB

44:50 Okay. And wouldn't transfers over to Quickbooks. How's it going like a batch or is it just go individually as you do that? How does that work?

QUINTON

44:59 Can be either? So you can batch, send these and sink them over or sync that over time?

JACOB

45:09 Okay. So this invoice when you hit send you an accounting system, and also just this is more so.

QUINTON

45:17 Correct. Yeah, if you went to the invoice report up here... basically, you could come here and for all the invoices that hasn't been sent out to your customers yet, you can bulk send all these to your accounting system.

JACOB

45:35 And once they're sent over, do they fall off of that view? Like why don't you send them over to accounting? That way you don't do it in place?

QUINTON

45:42 Yep. It'll change their status as like, I think it's either processed or I'm not sure what the status changes too, but I'll actually send you over because like all these status is right here. Just, okay. I'll send you over a Quickbooks recording of how the integration work, just because I'm not the Quickbooks expert, and that will kind of show you guys exactly how the integration works with service trade.

CHUCK

46:07 Okay.

QUINTON

46:15 Any other questions around that?

JACOB

46:16 Though.

JACOB

46:21 Nope.

QUINTON

46:25 Okay. Awesome.

JACOB

46:26 Well, as long as you can override the time to like for like clock in, clock out because, you know, guys are gonna clock in button, for instance, like outlook... for their time?

QUINTON

46:38 Payroll purposes?

JACOB

46:40 For invoicing and payroll.

QUINTON

46:41 Invoicing and payroll, yeah, you can adjust that time as needed. It's not something where it's just gonna go to the work order, then invoice the customer.

--- *Next Steps* ---

JACOB

46:50 And I just want to confirm the technician can change the time, right?

QUINTON

46:54 The technician cannot change their time that's going to be done in the office, that technician can put on the work order of the time that they, that needs to be billed and they can add that, but they can't change the actual clock event of, you know, if they were clocked in and onsite for 16 hours and they actually are out there for 10. They need to either put that in the comments section of how long they were actually out there or they can put it as like a line item for the office to see if like, hey, we need to build for 10 hours.

JACOB

47:26 Okay. They put the time in... paid. So.

QUINTON

47:36 So, they would still do the same thing that the time on the work order for the clock events is not what's builds the customers strictly for internal purposes. Only have, how long were their checks out there? So you can see, you know, we're going to be billing for X amount of time and they were out there for this amount of time. But the technician that can still go into that work order like they're doing now and answering the time that they need to Bill for?

JACOB

48:03 Is that the opposite of what you just said? I'm confused. Sorry, if we go back to complete my call on the technicians mobile device?

QUINTON

48:14 Yeah.

JACOB

48:15 Is there a distinction? It can be late?

CHUCK

48:17 Hours?

JACOB

48:18 That he puts in like three?

CHUCK

48:19 Hours?

JACOB

48:20 Or is it all based off that clock?

QUINTON

48:22 No. So these clock events here are strictly for internal purposes only. So when I clock into this job here back on the work order, it's going to show the clock event of how long the technician was there.

--- *Next Steps ends* ---

QUINTON

48:33 But that's not going to be what's built into the customer. It doesn't sync over to be built to the customer.

JACOB

48:38 Where's he put the hours and.

QUINTON

48:41 In the job item section here. So he would click into the job items and he was, he would click on add part labor or item... and then he would just select the job items. So I'm just gonna say labor here.

QUINTON

48:58 We'll use H vac labor as an example and what you need three hours of labor. And now that's added to?

JACOB

49:08 That's exactly what we're doing that. Yes. Yeah.

QUINTON

49:13 Yeah. Sorry for that confusion there. I was just trying to say like there's two different things. So this is going to be their clock events of, you know, for internal purposes. But the technician would still go in there like they're doing now just to enter their time to be build.

JACOB

49:25 So the class is just for us really in the office to see how long are actually out there.

QUINTON

49:30 Correct. Yep.

JACOB

49:34 And does that go to reports somewhere for payroll purposes?

QUINTON

49:38 It can, yeah. So we have something called the service time card. We're basically all their clock events will pull two that's each technicians time card and they can submit that for payroll. It kinda saves a step for you did not have the answer these in manually into your accounting system.

JACOB

49:54 Can I come from somewhere that's not the TimeClock events?

QUINTON

49:59 From like a different payroll system?

JACOB

50:02 Hello from the time that they enter. So when you add a job item could have come from there instead of the cloud.

QUINTON

50:10 Can, yes, I can come from their late items. What are the time the clock events?

JACOB

50:17 Okay. Yeah. That sounds like it just gives, you guys are gonna hit that button and that's gonna be a huge tax. Yeah... you could, was when he gets there, you're so focused on regulatory fix. I think we just, we don't know if we can find a slack internally because they forget to clock out. We're just going off. I think that's why I wanna make the answer. You can do what I needed to do it from somewhere else that's not fun.

QUINTON

50:55 Yeah. I mean, really the only thing that technician has to do to start their job, is they're just clicking on that green button at the bottom that's pretty much saying, hey, I'm here. And then from there, they're just completing the work quarter, they're adding whatever they need to entering their time, entering the amount of labor hours they need to Bill for the customer. And then they can clock out.

JACOB

51:15 Okay.

QUINTON

51:20 Any other questions about anything that we've been over so far?

JACOB

51:25 We'll say nothing that we've gone over so far but say a customer calls in one word, sake are safe house calls in one day service call, can you walk me through that writing up a service call, dispatching? All that stuff?

QUINTON

51:38 Yeah, sure.

JACOB

51:40 If you were going to get to that and another spot, sorry?

QUINTON

51:43 No.

JACOB

51:44 No, that's...

QUINTON

51:44 That's great. So, we have this dashboard here. So this is basically a service call comes in as you described. Each of your technicians has their own what we call swim Lane and all their jobs here are on the dispatch board in real time. So, you know, as they're completing these jobs, you can actually click into them and view that entire work order of everything that they performed on that job site. There's a, there's two two areas here. There's available jobs. So this can be, you know, a queue of all your PMS that she just gonna come down here and plot these on the calendar as needed.

JACOB

52:21 You can just drag those now.

QUINTON

52:23 Correct. Yeah. Or they can be, you know, service calls that are in your queue of, you know, people that have called in and working to be scheduled... but let's just say a call comes in that we don't have in our Q and I'll say that it's... and target.

QUINTON

52:47 You can see the customer information populates here on the work order, you can describe what kind of call it's going to be, whether it's a service call, priority service call, PM, whatever it may be. You can assign it a particular day in time. I'm just gonna say it's for today and we're not quite sure what time we can get out there yet and give it a description of the problem. So, I'll just as an example, something is wrong. If the customer knows what piece of equipment is out there that needs to be serviced, you can come in here and select that piece of equipment. So I would say this rooftop unit.

QUINTON

53:31 So, once you hit save, it falls into an unassigned bucket at the top right hand corner.

QUINTON

53:39 And now you can click and drag this job down to whoever can take it. So I'll drop this on and his calendar.

JACOB

53:57 Hello? Hi, can you send that service called tag will automatically do them the, drag it on there?

QUINTON

54:02 It will, so if you release it to them, it will automatically send them that notification and then also to their list of jobs complete, but you can unreleased this appointment and move it to, let's just say, you know, we're not sure of Billy or Brett are going to be finished with their jobs yet, and who can take this? So we can leave as a placeholder for Billy. And once we know ability can take that job, we can release it to them. And that's when you send the notification.

JACOB

54:38 And then will disappear from the board when he can please call.

QUINTON

54:43 It will disappear, it'll have a little check mark here.

JACOB

54:46 Okay.

QUINTON

54:47 Yeah. That way if you have questions about, you know, like what happened yesterday, you can go back to the calendar and you can see all the jobs that were completed and things like.

JACOB

55:00 Yeah.

QUINTON

55:01 Yeah.

JACOB

55:03 Yeah.

QUINTON

55:07 I heard the idea in the background, but we've seen other customers before they'll have a big TV screen with this, you know, just displayed up there and it looks really cool and you can see an update in real time.

JACOB

55:17 Yeah. How hard is that to do?

QUINTON

55:20 To display that?

JACOB

55:22 Yes.

QUINTON

55:24 I believe all you need is like an HTM I cable and have it hooked up to the TV. So think it's pretty easy.

JACOB

55:30 Okay.

JACOB

55:31 No, no, right now, it's Texas.

JACOB

55:38 Take this to you via.

QUINTON

55:41 Reporting back.

JACOB

55:42 And nothing happening... that 2000 sets are, see it. Yeah.

QUINTON

55:56 The only thing we didn't go over today though is the customer portal is that something that's an important you guys are of interest is something that your customers can log into.

JACOB

56:05 I think so. Yeah, it definitely is moving forward. Our current one has one is 20 dollars a month and I guess is 20 dollars a month per customer. And I guess it's not good. We obviously don't use it right now.

QUINTON

56:20 Gotcha. Okay. Well, this is what the customer portal will look like on your website. It'll have your branding at the top left hand corner and you can make this color scheme how it looks like on your website currently. But basically, they have, they'll have a service over view of everything that you're completing for them today. They can see upcoming jobs. They can see recently completed job. You know, each of the jobs you've already completed for them. If they want to come over here and pay on these invoices, they can click into them and pay them as needed.

QUINTON

57:01 There's a location and assets sets, asset section. So, if, you know, you work on a corporate headquarter with multiple different locations, that customer can come in here and click on these locations as needed and view all the service history at that location or each piece of equipment that's there. And they can even request service on individual piece of equipment from the customer portal.

JACOB

57:33 Wait, where did they go when they request services to send like an email that dispatch? Or who is that?

QUINTON

57:38 Ability vacation and I'll dashboard of available job?

JACOB

57:48 Someone they request service. It's kinda like what our dispatch board fill out as if they called in southern customers filling it out.

QUINTON

57:54 Exactly. Yeah.

JACOB

57:55 Can you show us what that looks like real quick? So your customer you're requesting service, how does that flow?

QUINTON

58:03 I don't know if we have that can right now to our demo environment, but I can give it a try. Let's see. So we'll request service here. We'll say on this particular piece of equipment, this is going to be H.

JACOB

58:20 See.

QUINTON

58:22 I'll say this something is broken?

JACOB

58:30 If the customer doesn't know the exact piece of equipment. They're just like my cafeterias. Cold. Can they do that without having to pick an appointment? Yeah?

QUINTON

58:39 Hi, this is there's a service request button up here that basically allows them to fill in blank work order.

QUINTON

58:50 All right. So, just requested that, and then back in the office view should show up here on my dashboard.

QUINTON

59:12 Right here. So it was a service call for HP AC. Obviously, you guys wouldn't have as many of these jobs. This is our demo environment, but basically, we can click into that job of that service request.

JACOB

59:26 And our dispatcher also get like an email or something?

QUINTON

59:29 Yeah, I believe. So, Chuck, there's an email notification that they get it, right?

--- Next Steps ---

CHUCK

59:33 That's correct. Alright, perfect. Yep.

QUINTON

59:36 So, it'll bring them directly here to the work order. This is what the customer said, and then you just schedule it for a date and time.

JACOB

59:44 And when we schedule it right there, the customers, like I'm getting it, right? The first thing you'll get is when our customer trucks on the way. So say we schedule and we have to change it. They won't know that.

QUINTON

59:55 Yeah, exactly. But if you did want to notify them, like, hey, we got your request, we're going to be out here on this particular date. You can send them what we call a service link, which is basically like a pre appointment reminder of like this is we're going to be out here to perform that work on this particular date. And here's the technician that will be there, but it's completely optional if you want to send him that.

JACOB

1:00:17 Be nice.

CHUCK

1:00:18 For them to know that we...

JACOB

1:00:19 Received the call so... that when you go back to that tab. So all the open jobs like the ones that are scheduled, that schedule in the next 24 hours or two weeks or whatever it was. Is there a way you can click and say you have a call?

--- *Next Steps ends* ---

JACOB

1:00:35 Where did order parts? Is there a way you could put a status like waiting parts or... something like that, just so you know, bands or you're calling check on. This has been three weeks in the spam folder. So let's show. Yeah.

QUINTON

1:00:50 So the best thought for that would be the jobs report. It would be in your past jobs to be marked complete section on the dashboard. But this jobs report is going to be where you can come in and say, I wanna see all the part of the jobs that we completed that have parts that needs to be ordered or part time... so.

JACOB

1:01:09 Okay. Really?

JACOB

1:01:16 Yeah, or partially received. So when we get parts in on a po or just go into the VM and right? What was received, mess out in that field would correlate to their job?

QUINTON

1:01:28 Yeah. So if you guys were to use partsledger, basically, you can create a po, and once those parts are received, you can sink them over onto the work orders. So you're not having to like individually add those parts onto a job. So it makes it pretty easy. And if there's like a little arrow that shows you what parser receive and not receive.

QUINTON

1:01:52 I'm assuming you're doing all that in Quickbooks now.

JACOB

1:01:55 No, that's all perfect. Okay?

QUINTON

1:01:58 Got it.

JACOB

1:02:03 And so then when you open a deal or you waterparks, the POS is attached to the job, right? So you can go into the po and that's the part, is there, is that what you're talking about? And then it will update the job or is that something totally different?

JACOB

1:02:21 I'm...

QUINTON

1:02:21 Chuck, can you help me out with that one?

CHUCK

1:02:27 I'm sorry, what was that? A question? I gotta get diverted here?

JACOB

1:02:31 Like if you have a job and you open a purchase order against that, like right now, if you have a job, your purchase order, if you open up for services, that job, you, is that when the items come in, you usually put that in the purchase order, right?

CHUCK

1:02:46 Yeah. So, when the parts come in, you go to that purchase order, you receive the parts against that purchase order. And those parts now show up on that job as being received and you can now reschedule that job or schedule the job.

JACOB

1:03:01 I don't like the service tech when he opens a job. Well, he see what parts are on that job from the po, that, right?

CHUCK

1:03:07 Correct. Okay. Correct.

JACOB

1:03:10 Versus right now is a pain in the ask was no... worries. Well, even Sean has the robot for the jobs for inventory and log in, right? So, this is already a lot of inventory. Did you actually use forward? It's only used to.

JACOB

1:03:33 But you said it's supposedly like if we have po from right now, stuff comes in. Somebody's putting out. Yeah, that's the stuff that we just do that.

JACOB

1:03:41 Yeah. No, it's supposed to be one on the bottom there's. This stuff is received 10 shelf stuff. Interesting.

CHUCK

1:03:48 Right.

JACOB

1:03:50 Doesn't always happen so, you know... there's nothing system or you can search and see, I wanna see jobs reports and receive others. Okay. Yeah, right. On the dispatch board, I guess there's a tab parts. It gotcha. There's like waiting parts. Yeah.

CHUCK

1:04:12 Are, are you ordering parts for every job? Or do you have inventory in a warehouse and trucks and that kind of, they do? Or is it all?

JACOB

1:04:19 The ordering parts on, Sarah. Yeah, we try to just order parts for jobs. We do have a warehouse full of stuff. It's been up for a long time, but I mean, we'll dive into that stuff filters out of there, whether that be by stuff shots.

CHUCK

1:04:33 Okay. Yeah. We can track what the both sides of it. If you want to track the inventory, we can do that too and track real time inventory and the trucks as it gets depleted and used on jobs, you know, however you want to do that.

JACOB

1:04:49 Okay.

QUINTON

1:04:50 Well, do you guys have any other questions?

JACOB

1:04:55 Well, this is mostly for like what we call spot, right? So, how projects are they the same projects or the same spot calls in this or?

JACOB

1:05:05 This, this area, rooftop replacement. Yeah. How would we do that? Would you just create the same as a service call?

QUINTON

1:05:13 How long are your projects typically last thing for?

JACOB

1:05:16 Not really afraid now, I guess it would depend also very short like a week or less. But then you get into some that are three, four or five months.

CHUCK

1:05:25 Well.

QUINTON

1:05:26 That's that's perfect. Yeah, we call those like short term projects and service trade, which is kinda right up our alley. We just added a project management feature to service trade to where you can track, you know, projects from a few days all the way up to, you know, six months or so. But basically, you're creating a proposal with you get, you can create phases on there. You can schedule those phases out as needed and then service trade is going to show, you know, the completion of that work in Progress, the budget for that particular project, you can keep track of and, you know, Chuck and I have a video. That kind of shows you exactly how that project management piece of work and service trade. If that's something that's...

JACOB

1:06:06 Yes. Could you email that to us?

QUINTON

1:06:08 Yeah, absolutely.

JACOB

1:06:09 Okay.

QUINTON

1:06:14 What is...

JACOB

1:06:15 Your understanding Quickbooks online as well? Integration?

QUINTON

1:06:18 Yep. I'll send the Quickbooks integration along with the project management.

JACOB

1:06:21 Okay. Well, say like a PM contracts, what does that look like? Where's the thing that shows like how many hours you have budgeted for the year for the year, the profit and that kind of thing?

CHUCK

1:06:34 The...

QUINTON

1:06:35 PM contracts, I mean, you can run reports here on the job section of like what type of reports are you looking for? Just like profitability on what you're making over a period of time for those?

JACOB

1:06:48 Those somewhere to see what contracts are coming up for renewal technologies? You gotta renewal. I mean, those are the big ones... well.

JACOB

1:07:00 Or...

QUINTON

1:07:00 The PMS or there's two things that you can take a look at. One is like service opportunities, which is basically saying, hey, for all the teams that we have, what's do. So for a particular date range, I can come in here and say, I wanna see all the teams that we have do for next month... and it will go through all your customers and their locations and allow you guys to bolt, right? These jobs as needed. So you can come in here and either create all these at once and schedule them for a technician and go ahead and knock out as needed or you can select, you know, a few at a time. But this basically allows you to keep track of these. And then the jobs report here is basically where you can see like what PMS do we have for each particular customer? You can see, you know, which ones are outdated or which ones needs to be, right?

JACOB

1:07:57 So, where do you see? I guess it gives me another question. I see how many open PM hours or total?

QUINTON

1:08:09 That would probably, I'm trying to think charging you the best way to see that type of information. Would that be more of a quick site thing?

CHUCK

1:08:17 That's a good question. I need to research that?

QUINTON

1:08:22 Yeah. Let us think about that one. We definitely have the ability to do it, but it might be through something called quick site. I don't know how to run that type of reporting service straight off the top of my head. But let me and Chuck get with our team and find that out for you.

JACOB

1:08:37 Okay. And where it could say, I wanna see how profitable one contract. Is that something that you have set up that you could show us, you can just pull it up and say this was the budget. This is what we've spent.

QUINTON

1:08:50 Again off the top of my head, I'm not quite sure the best way to do that. Unless Chuck, you have any ideas?

CHUCK

1:08:56 Yeah. You could show the budget on a job. When you create a job, you could create the budget for it and show it, go back to the budget as needed.

QUINTON

1:09:08 Okay.

JACOB

1:09:09 Well, for a PM, so say we're doing a preventive maintenance agreement, and I wanna see if I need to raise the PML, you know, I want to see how many hours were actually users, what was tasks, how much material use? Is there a report that will show me that?

CHUCK

1:09:25 Yeah, for an individual job, I mean.

JACOB

1:09:27 For a PM, a preventive maintenance?

CHUCK

1:09:30 Yeah. Yeah. So you basically create a budget for that job and then go look at the budget on an individual job and it's going to show you the, you know, where you are on it.

JACOB

1:09:43 Or a contract.

--- Pricing ---

JACOB

1:09:43 I guess now for a job like for a PM agreement where you're going to go out new four visits throughout the year, 40 pieces of equipment. So it's like say it's a 10,000 dollar contract that's gonna last all year.

CHUCK

1:09:59 Let me look into that one too.

QUINTON

1:10:03 Yeah. Let us double check on that guys because I'm not exactly sure how to do it off the top of my head. I know we have the ability to, I'm just, I wasn't prepared to show you guys that today. So was let's take a look at that and we can go over that in our next meeting.

JACOB

1:10:17 Okay. Sounds good.

QUINTON

1:10:22 Hi, it's those last few questions. I mean, what are your thoughts on service trade being a good fit for your business? Could you see this being a better solution than what you guys are currently using?

JACOB

1:10:33 He has it possibly could be, but I mean, those other, those couple of times are pretty important. Yeah, I would assume that you can do it, but I mean, we, the PM contract is a pretty big part of our business. I don't know, 15 percent of our business, 20 percent of our business interests, 1,515 percent of our business, which one?

QUINTON

1:10:59 And all those PM contracts, you're just wanting to see the profitability and, you know, the budget of that PM contract.

JACOB

1:11:07 That, and then knowing what's open, what's coming like easily pull up a thing saying, okay, box over, we still have so hours left because right now everything we test kind of quarterly. So we have like small business. So I want to be able to pull up and say, okay, we've got 1,600 hours left to do. And then in December or another 4,000 hours or Kelly, how are we going to do this?

QUINTON

1:11:30 Got it. Okay. Yeah, mean Chuck will get with our team and figure that out for you guys. So it sounds like that would be something we would go over our next meeting. And along with partsledger, is that a meeting we should set up to walkthrough that side of service trade as well?

JACOB

1:11:48 What's partsledger?

JACOB

1:11:50 It's like your inventory books.

JACOB

1:11:56 I'd say that VM is the most important thing at this point, trying to figure out how we do the reviews and then.

QUINTON

1:12:01 Yeah. Well.

JACOB

1:12:02 Timed...

QUINTON

1:12:02 Out.

JACOB

1:12:03 So...

QUINTON

1:12:04 Yeah.

JACOB

1:12:09 Yeah. And I definitely love to see that video for the surprise like the small project management then.

QUINTON

1:12:17 Yeah.

JACOB

1:12:17 Absolutely. I think for service calls, it looks like your system is awesome. I, there's no question. It was way what we have for service calls. I just want to see how does everything else... for?

QUINTON

1:12:30 Sure. Yeah, we'll get that video over to you and then we'll set up another meeting if that works for you guys to go over the PM questions that we left outstanding, what would work?

QUINTON

1:12:44 Nice.

JACOB

1:12:44 To meet?

JACOB

1:12:51 You guys and calendars, as soon as she got nicely. Yeah, I mean, I think the reason for me on this range... yeah. Yeah.

JACOB

1:13:01 Yourselves and I'll just have to do.

JACOB

1:13:06 Merchants... Friday work for you guys?

JACOB

1:13:10 Yeah.

CHUCK

1:13:11 Right Friday would?

QUINTON

1:13:12 From me... you guys want to do at 12 o'clock...

JACOB

1:13:21 You know... when your 10 o'clock is that gonna be somewhere entirely too?

QUINTON

1:13:29 Tam?

JACOB

1:13:30 You wanna do nine o'clock me if you can do that eastern work. Where are you guys are?

QUINTON

1:13:37 O'clock works for us?

JACOB

1:13:39 Okay.

QUINTON

1:13:40 Awesome. I'll send you over an invite for that time just to give us an idea of your guys this time line. If you guys did find, you know, the right fit out there, I know there's a lot of other things that we have to vet out with service trade, but what type of time line are you guys looking at? To having a new software in place by?

JACOB

1:14:01 End of the maybe about and a March?

QUINTON

1:14:04 Six months?

JACOB

1:14:05 Yeah, five, six months.

QUINTON

1:14:07 And is that to have it up and running? Or is that to make a decision on something?

JACOB

1:14:11 No, I have it up and running.

QUINTON

1:14:13 They're running my Mark.

JACOB

1:14:13 Mark Marshall?

JACOB

1:14:17 This because April is crazy busy and we're going to be usually really busy until excellent. Yeah, sure. So, we have some time to implement and figure all this stuff out earlier. How long is your implementation time?

QUINTON

1:14:32 Yeah, great question. So, implementation takes about 90 days to go fully up and to get fully up and running with service trade, we have service delivery windows. So, you know, the earliest we could get you guys signed up and starting to that implementation period would be 1,215 and then from there, it takes about 90 days.

JACOB

1:15:00 There's no way to 715, maybe sign the paperwork if you want to get started. You know, what are the... critical?

JACOB

1:15:13 Yeah.

QUINTON

1:15:15 Hi, I'm sorry, I didn't catch all that. So, what was this for 15?

JACOB

1:15:20 To December fifteenth isn't gonna work for us. We're starting to work, right? We just signed it to start a new payroll and overall HR system that starts on January first. So we are going to be doing that from now until at least January first name January first. Trying to hopefully, we're not sure.

QUINTON

1:15:41 Sure. And, you know, the next one from there would be April first would be the next service delivery window. One thing though about our implementation process is a it's pretty, you know, easy thing. When it comes to meeting with your project manager, you basically have, you know, weekly calls starting on that, you know, December fifteenth to where, you know, one person would be assigned to kind of take over your implementation and your crew, and then they're kind of leading that project from there. So it's not a ton of time you'd have to devote each week but, you know, it is a weekly call starting on that 15.

JACOB

1:16:17 Well, what kind of, what kind of pricing you guys do it like by office user, by technicians, by total pricing structure? Look?

QUINTON

1:16:25 Solely based on the amount of technicians that you guys have. So all your office staff is free. And let me pull up the pricing page real quick.

QUINTON

1:16:39 So, there's three different tiers of service trade. We have our select premium and enterprise. I would recommend the premium package for you guys. That includes the service portal. Also 24 seven emergency support and the ability to... use the project management features in partsledger, if you guys were to go that route, and that's one 39 per technician per month build annually.

JACOB

1:17:06 But doesn't have recurring contract invoices as part of that.

QUINTON

1:17:10 It does not, that would be on the enterprise plan.

JACOB

1:17:13 Wow. Okay. Yeah. I mean, I'd like triple our price of what we're doing now and that's the whole building ups. Yeah.

QUINTON

1:17:24 As do recurring invoicing.

JACOB

1:17:26 Yeah. I mean, we have some of those monthly allows that are quarterly. Yeah, I mean, that's a big our contracts that's how most of them are done. Very few are paid upfront. So, although like for the whole year.

QUINTON

1:17:41 Okay. Well, yeah, that's definitely something that we can talk about. But, you know, once we decided service trade would be a good fit for you guys, we can talk about pricing and things like that and see what the best path would be. Make sure that we're meeting your guys as budget as well.

--- *Pricing ends* ---

JACOB

1:17:55 Okay.

JACOB

1:17:56 What about customer access? Is there a separate charge for customer access?

QUINTON

1:18:04 The service portal that would be included in the.

JACOB

1:18:09 I'm sorry, I can't read it.

JACOB

1:18:15 Yep.

JACOB

1:18:16 Cool. Thank you. No, thank, you know, that's up to you guys next week.

QUINTON

1:18:21 As well. We appreciate your time today and we'll get those resources over to you and I'll send that invite out for next week.

JACOB

1:18:27 Okay.

CHUCK

1:18:29 Sounds good. Hey, I got a question for you. If I come down there in person next week, would that be okay? Yeah... sure. I think I'm going to be in town that next week, so it might be good to just come down and see you guys face to face.

JACOB

1:18:50 Sounds good.

CHUCK

1:18:53 I'll plan on that.

QUINTON

1:18:56 For your time, we have a great weekend. We'll connect next week.

JACOB

1:18:59 Okay. Thank you.

CHUCK

1:19:01 Bye.

The End