



# Followup ServiceTrade Demo with JG Service

Dan Waggoner with JG Service  
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## Participants

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# Transcript

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

DAN

0:00 Hello? Hey, man. Yeah. So who are we meeting with? I'm just getting.

CLINT

0:07 Adam and Bret.

DAN

0:08 Yeah, no, I got. Yeah, that was something else that experience that were you there for that whole thing?

CLINT

0:16 Yeah. Yeah. I just came off right now because I said I got to be on the demo, but I did my way, we'll be figured out. You said you have an extra two weeks vacation?

DAN

0:25 Really? That's true?

CLINT

0:29 Hello? Hello? No, after we solve that, we solve it pretty quick and it says great job. It gives you an extra two weeks paid vacation.

DAN

0:40 Maybe we didn't win the vacation.

DAN

0:47 Supposed to be tough. Yeah.

CLINT

0:53 That's right. You won't tell on me?

DAN

0:55 Yeah, it's it will only be on Gong but this?

DAN

1:03 Is Bret go ahead. Let Bret in here.

CLINT

1:08 Adam said he'll be working on, I guess cool.

DAN

1:16 Me, check on the star of the show, zillow.

DAN

1:31 Hey, there, Bret. How's it going? Good? How are you doing pretty well, doing pretty well... here? Waiting on or zillow from our team to join us? He'll be helping walkthrough the parks ledger demo. How was the, I know you guys were gonna look at SSO, couple of other things that, how did the other evaluations go so far?

BRET

2:02 Pretty good. The.

OZELLA

2:03 Page one.

BRET

2:04 Not too interested in that one. It's their new field, something they got a new branding to it for intact?

DAN

2:13 Okay.

BRET

2:13 Hello. With that one. Build apps looks really good for what I do because I have service and projects and then I got him one last time to review with curry, go.

DAN

2:29 Okay. Cool. Well, I was, Della has joined us now. Is I'm gonna be here to help walkthrough the parks ledger demo. She's really the brains of the organization does this? He's got a lot of knowledge on when it comes to integrating different products with service trade. So, if you want to say hello?

OZELLA

2:49 Yeah. Hi, everyone. Bret, nice to meet you. Happy to join you guys here. Hey, Clint.

DAN

2:57 Awesome. Do you have Adam there with you too?

BRET

3:02 I don't see him on the invite. I might have missed adding and I'll forward it to see if he can jump in, but he's little tied up today.

DAN

3:09 Okay. Gotcha. Cool. Well, let's see. So, Bret, yeah, a couple of things that we had on our follow up from the first meeting is that you had mentioned, you know, you wanted to discuss a little bit more of the budget factoring into those smaller projects as well as the generating purchase order numbers and sub contracting. So I was able to get back to you pretty quickly with some good news on sub contracting jobs. I'm not sure if you saw that part of my email that I sent you.

BRET

3:42 I mean, dig back in. I've been a blur, squeezes always demos in.

DAN

3:47 I hear ya. Well, that's okay. But it turns out that we do allow your subcontractors to use service trade for free with the mobile lap and sub contract jobs to them that way, but we can kind of discuss some of those things later. I do wanna make use of those out of why we have are because he's been nice enough to join us.

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

DAN

4:06 So if it works for you, unless there's something else that you want to top of mind, I thought that we would jump into the parks ledger forced into the demo here and walkthrough how you can generate purchase order numbers and sort of that whole process. And then we can take it from there. Yeah.

*--- Access to information ---*

BRET

4:21 No, it sounds good.

DAN

4:23 Awesome. Excellent. Well, I'll hand it off to you here.

OZELLA

4:27 Yeah. Awesome. So what I'm gonna do is I'm gonna screen share for the mobile app. And that way you can kind of see what that looks like with the technicians. I'm drafting, poke through field, requesting items, stock lookups and things like that. And then also go over to the office use as you can see what it looks like from the back office. And then I'll toggle between that screen and service trade. You can see how the information kind of communicate with, you know, between the two systems. Give me one second here. Let me make sure that my phone is in the meeting and take a look, let me know if you see me in the waiting room.

DAN

5:11 Yep. Just admitted.

CLINT

5:18 Recording.

OZELLA

5:18 Progress. Okay. Let me check. You literally don't have an echo. Yeah, screen share. Alright. So first, we have the SaaS model family picture and we will come over to service trade mobile app, which should be a familiar view.

--- Access to information ends ---

OZELLA

5:41 Such a like just bear with me.

BRET

5:45 Wow.

OZELLA

5:46 Yeah. It's going so slow, isn't that incredible? It's painful because it's up on my screen already. So I don't know why it's taking so long to come over on your end.

BRET

5:58 Sometimes they're like they're very good.

OZELLA

6:00 There we go. Alright?

BRET

6:02 It helps a baby, turns off their cameras when I do.

OZELLA

6:07 Yeah, yeah, yeah, for bandwidth for sure.

DAN

6:10 Hello?

OZELLA

6:10 Alright. So I'm gonna click into two days job to make sure I'm in the right place. Me 17 job number three nine. There we go. Alright. So I'm on the job, I can see how many items I know I'm going to use to.

OZELLA

6:28 So I'm gonna go ahead and clock in and I'll show you why that back into the matters later. So in a typical scenario, you, your technicians on the job and maybe it's you know, because it's been automatically populated or someone in the office new would be me, they might have gone ahead and put some items on.

--- Parts management (inventory) ---

OZELLA

6:45 Okay, we're going to replace some filters feasible links, but let's say that I'm looking and I decide, hey, I actually need 360 links. You know, I need something different that's going to require me to create a purchase order or stock transfers. I need to go over to parks ledger handle that.

--- Access to information ---

OZELLA

7:07 So, for the technician, once they're logged in, both and it's the same credentials for parks ledger, mobile and service trade, they don't keep re, logging in. So they're already logged in and you can see I'm gonna actually refresh this so you can pull in the right job number.

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

OZELLA

7:29 Here we go. And you can see that it's populated my job number for me based on the job that I'm quite into. So that's really convenient and really nice. Let me see if I can look up. And as soon as you start typing in the stock woke up, it goes ahead and queries against your item list. Okay? It saying no results found. So then what I can do is come here and do a purchase order. Whoops.

OZELLA

8:06 And I will create a new purchase order. And you can see because I'm clocked in again for that job, it goes ahead and pulls up the job number.

--- Parts management (inventory) ---

OZELLA

8:12 It's got the information, you know, what customer we're talking about. If I want you to include some sort of a note there. I could.

DAN

8:21 Hello, real quick that first purchase that you did where it said no results found that checking the current inventory?



OZELLA

8:28 Correct.

DAN

8:29 Awesome.

OZELLA

8:29 Yeah. So that was checking my inventory and that over and part ledger out. I'll show you that later, but I just did like a stock search to see whether or not I have any of those.

DAN

8:40 Perfect. So, the tech now knows that you guys don't have any in stock and they're able to.

OZELLA

8:46 Yeah.

DAN

8:46 Perfect.

OZELLA

8:47 Yep. And of course, you can kind of make decisions about what type of permissions you want the technicians to have. Do you want them to create purchase orders and issue? Then? You just want them to fast. You want them to have that functionality all and just focus on the stock transfer portions. You know, we can work with different types of roles and functions, but, you know, for the purpose of this demo, I'm going to go through the full kind of functionality of it.

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

BRET

9:11 Okay. As we like to have like a sequential po or they're not making them up and they're locked in. We used to use like work order amount, visitor variation and you guys would go and pull out for you three days after they finish the work order, and you're like you don't catch it for a week or two... that's where I talked with Dan. They were just, I just want to have that kind of security and.

OZELLA

9:38 Yeah, but we can set the starting po number for sure. I mean, for this one, once it's finalized, I'll show you the number that it issues. But so I went ahead and ordered some of these links through 60 and I'm gonna finalize...

OZELLA

10:08 It's taking a second to come through on that end. But really, it's as simple as that your screen should refresh any minute. Now, there we go. Finally. Alright. So you can do it. It's given a po number and that's again, this is based on my demo account, but we can start that say like 100 or 1,000, you know, something like that so that it gives you a certain account based on what you guys are expecting from digits. Alright? And then you can also attach photos at this point if you wanted to.

ADAM

10:45 Hello?

OZELLA

10:51 And then I would just click done... and it's as simple as that. So at that point, your technician was able to look up, stop, create a po for stock and I'll go over to the office and show you what that looks like. But just before we come out of the technician view, I also wanted to show you the stock transfer functionality.

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

BRET

11:15 Okay.

OZELLA

11:16 If I know that I have something in the main warehouse and I did on my truck... I can create a transfer.

OZELLA

11:32 This slide is killing me. I don't wanna talk ahead of what you guys can see. So I'll just wait what shows up on me?

--- *Access to information* ---

BRET

11:49 So, is this guy's gonna open up a screen that you've populated? Let's say transferring from point a to point B?

OZELLA

11:56 Yeah. Yeah. But for some reason on my end up and now I'm lost connection. So my mobile app, my phone has kind of fell on me. But what you would expect to see there is, yeah, that's weird.

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

OZELLA

12:12 What you would expect to see there is it would just give you an option to select the item. And then from there, you would say how many units you wanted to transfer

and move them from the main warehouse to the track. But I'll just go to the office view and show you from there. Since my phone is kind of proving to be a little bit about the.

BRET

12:31 And then when your search, when you're searching stack originally that check all stock locations or just the guy's truck or?

OZELLA

12:38 Yup. Yup. So it would show you, yes, exactly. It will show you I'm stuck on the track, it and show you for that item where it is and how many of that you have. So if I had five on top five on another trap 12 in the warehouse, it would show. Okay, well, for this item, this is where you have how many. So, you know, where you would be doing that transfer found that that's what you wanted to do?

BRET

13:02 Okay, great.

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

BRET

13:03 So I can look at other trucks as well with guys that far away, I can go pick it up from him. Yeah. Okay.

OZELLA

13:11 For sure. So I'm gonna come off of mobile screen share so she can see service trade.

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

OZELLA

13:29 Okay. Okay.

OZELLA

13:37 Alright. So now I'm service chain, I just refresh my screen and as soon as I hit refresh, you can see this new items. So for the same job ending in three nine... you can see these are the items we had before the 500 and the filters. But then here we added the 360 and you can see their order but not yet received. And this is the po number. So now we're gonna come over here into price ledger.

OZELLA

14:17 And you can see your number 14 that has been created from the office. You, I can come in here and make some different decisions now, right? Sell a requested 100. Maybe, I know that in addition to what she needs from her job, we need more than that for, you know, for inventory. So then what I'll do is maybe I'll come in here

and say for the same for the same purchase order but not necessarily tied to that job. I want 100 more.

OZELLA

14:59 And then I can go ahead and issues, yeah.

OZELLA

15:06 And so now you can see the po status is updated. You see when you see who did it, who approved it? How many they ordered, what they were doing it for this is just for stock. So it's not tied to a sales order and parts ledger refers directly back to a job in service straight. And you can see that job detail here. The sales order and service call me, see how many. So now we'll kind of move forward to actually receiving it and I can receive it from right here within this purchase order screen. But what I wanna do is actually I want to come over here just to kind of show you the alternate workflow. Hello, we can come in here and we can receive shipments as well. And this allows, you know, if you've got many shipments for different purchase orders, you can come in and then bulk receive or, you know, update them in one place which is really convenient... you know, make this a little bigger. So what I don't have to Erica, you guys can see my screen a little better. So now, let's say that I've received. What did I order here? I got two sets of three sixties. So let's say that I received 50 of the ones that I want to go straight to the job by receive all of them. One thing I just received 50.

OZELLA

16:35 I will receive Rose.

OZELLA

16:45 And so what that's gonna do? Because I received all of one, it's gonna go ahead and remove it because there's nothing left to receive. But what we're looking at now is I still have 50 standing, so that's the total quantity, quarter quantity received, 50. Then we can come back over to service. True?

OZELLA

17:08 And we can see what the status is updated to received.

OZELLA

17:20 So what the other thing that I wanted to show you here is if I had actually added multiple items here, let's say that I had added another set of links or a different sizes filter, right? And I can show you that as well if you're interested, but it would show a partial receipt as well. And that's what I was hoping would have happened here. But I think the one that I received in full was just the opposite of the one that I had intended to. But you kind of get the idea with how those different status update. So does all of that makes sense?

BRET

17:55 Yes, it is.

OZELLA

17:56 Yeah. And it's all pretty clean pretty easy. You know, it's very user friendly and you can see the different status updates here as well. You can see which order has been partially received partially filled versus fully. And then you can go back... and you can fully receive the outstanding items... and you can do it with just a quick. So in this case, it's just one. So it's not, you know, that much and below difference, but imagine if you're doing, you know, tens of POS per day that would be a very convenient can feature to have.

BRET

18:36 Yeah, I like that, you know, on your work order and see if it's all mercy partially receive.

OZELLA

18:42 Yep. Yeah, absolutely. And then if you were to receive, you know, you Steve things based on and a physical, they're here. Let's go ahead and enter it in VS, you receive it based on the invoice. If you needed to enter an invoice number or something like that from your vendor, then you could put that here, you know, and then you could confirm it. And so then that now becomes tied to that here as well. When I refresh.

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

CLINT

19:16 Hi, Bret, real quick. Turn it on. I'm good. I know you said you mentioned about BuildOps. Did they go over? I'll just curious how this compares versus BuildOps?

BRET

19:29 This, this is more detailed there's. It's kind of like a topical in terms of purchase orders and it covers the basics of what we're looking for.

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

BRET

19:38 This is a lot more detailed like purchase management. It sounds like it's on par with what, how kriegler saying that they're operating their system because that's one thing added for from anybody ask is that you can check stock across trucks. I haven't seen the demo. Yeah, I just did.

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

BRET

19:58 I just did a discovery, you know, walkthrough because I've been working with them for a few years on this as a service provider, but this is what I look for in terms of being a manager in operations like this has all the controls or that, you know, I like a lot of the other service programs or just like very basic in terms of the po and you can add real items, fake items and I kinda toss it in there.

OZELLA

20:31 Yeah.

CLINT

20:31 There's better on the management like you said, the manager, your guys out in the field and be able to see windshield time and those guys can help each other out in the field instead of, you know, waiting on parts and things of that sort and wasting time, right?

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

BRET

20:44 Yeah, like I like the one, the ways he gets in or to like they can have their po, they started the po, but then they always kind of skip over five or six other items they're grabbing whether at the counter and you're admin can go and add them. Then when they actually see the ticket and... so kind of covers all a little bit as we have on our system where my county right now it'll say the po is for 250, gets it for 500. Any who's changes that I don't know like logging. Yeah, I've been put on the truck.

CLINT

21:18 Right now that's good feedback. I'm glad that I'm glad to hear that.

OZELLA

21:24 And have it. So I'm gonna show you one more thing for POS. We kind of we walked through the full permission workflow. I'm gonna show you what that looks like creating the po from the office and then that'll be it. I mean, it's very similar to work the technician would do, you know, it's just doing it in this kind of more open interface. So you select your vendor, let's say that we were getting this from a different vendor and we wanted to do it for the warehouse or actually let's say if you wanted to, you know, for the... truck one and we can do a direct purchase for sales order. So remembering that sales referring to service, dream job. And you can see what that did is that gave us another column here for the sample. That's the only difference with getting it directly for a job versus for an inventory. And then I can come here and I can select the job them talking about. And this is the job and we're just working on. So then I can come here and I can... make that selection. So we were talking earlier about, okay, well, what if I wanted to get different size, need leads? And then I wanted to order, say 100 of those. I don't think I need answers, for example, let's say 10... and then we can submit that way.

OZELLA

22:52 So now that's an issue... now back here... on my service trade that we see we have another line and it's that quick introduce it right... now, we can go back here and we can receive it and that's effectively the same kind of workflow. And I'm gonna show you one different thing here. I'm gonna update this, right? Let's say that they're not 799 anymore because the world is changing. And 999 and I received seven. I want you to see what that looks like on the job as opposed to before we speak. And then I'll... close... not come back over here.

OZELLA

23:50 Okay. So now we can see a few different things. We can see that our price for the quantity that we received those seven came in at 999. Those have been received, but we still have three outstanding and they're still at the price that we were expecting before. But when we receive those, if the price changes, we can update that. In parts. I don't we don't have to do that here in service trade, these are still order but not yet received because we have three outstanding.

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

OZELLA

24:17 Alright. So I'll go ahead and complete that. And then I'll go over and chain the inventory side and some of those different adjustments. But that is purchase ordering in part slider mean if it's really straight up and really nice dinner thing, super easy to use. And you see that is something that your team could probably pick up pretty quickly.

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

BRET

24:44 Yes, very similar. What we're doing this little easier to navigate.

OZELLA

24:51 Okay.

BRET

24:52 We're working with paid 300, so.

OZELLA

24:56 Hear ya. I hear ya. Alright. So this when you told me the stock page, you can see your summary that's the first giving you which is a really great quick snapshot of what you have and where you had it, how much you can do transfers here and investments here.

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

OZELLA

25:12 Same like what I was showing you with that... you know, adjustments here. You can see, you know, how your stopped moving and then you can see what action to the influence those adjustments, right? It wouldn't down to place an order was fulfilled and went up because it was received.

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

OZELLA

25:30 You can also do returns and things like that. You also have a really great little audit or the transfers so you can see or it was transfer from and where it was transferred to, if you want to go see more detailed anything, click into that as well. And then we also have our items. So again part suddenly becomes time, your source of truth for your parts, an items in costs and prices and things like that. And then it just needs the information right back over to service trade and it updates everything name... in there we go. So now you can see we've got an average cost... added for the remaining three.

BRET

26:17 Hello, you do have some time here, man. You are, the sale price is getting logged in through price ledger. And then I just feeds into service trade.

OZELLA

26:29 So, yeah. And that's kind of an interesting one in terms of the sale price. But generally, yes, I mean, so service streams really kind of reading this fine. This is really what service trade is reading is the purchase price you pay for what is your cost?

*--- Quote templates ---*

BRET

26:48 Yeah. And.

OZELLA

26:49 And in most cases, sorry, go ahead.

BRET

26:51 And then, so what's populating sale price of that, add a service trade or?

OZELLA

26:56 For this demo account, I would have to check because there's different kinds of rules that can be here. But I believe so typically it's this price that the format the service trade and then what's running your price for the customer is going to be your contract rolls over here. Okay? And usually you're going to have those align. Yeah.

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

CLINT

27:21 I was just about to add on that... just to reiterate from those prices read. I like we talked about on that first demo where you can create as many agreements you want to move those contracts that's going to be all your markup rules there. I purchase price is the main thing that you want to get in there.

OZELLA



27:38 Because...

CLINT

27:38 You want to know what you're pulling out of your pocket. And then all of those mockup rules and everything will show what you're going to be building that customer.

BRET

27:46 Great.

OZELLA

27:49 Yeah.

BRET

27:50 Really wanna make sure I wasn't like in two different spots or, you know, we got two different databases and fill pricing going. So.

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

OZELLA

27:57 For sure for sure, what service trade really service pages reading it's, reading that purchase price. Alright, let me, let's see. Alright. So we've gone through, we looked at items. So this is so I in library, if you have to change the name on an item, add an item to your inventory price description, any of that you do that here. And then it will populate your item list over here. In service trade, you have your list of items. And then it'll just populate so that whenever you're adding that unit cost, it's gonna populate for you. Alright? And then warehouses the last. And I wanna make sure that you see that your main warehouse and top one and two. So these are all basically referred to as warehouses. He says we're stock in store. It's if you've got 20 trucks on the road at 15 trucks on our main tracks, each track, you can go ahead and assign stop to that track, any report that you can filter and all that good stuff.

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

OZELLA

29:03 I also have a vendor view as well. You can see the two different vendors that I have set up on my account. So whenever I'm hearing service say, if I need to say, yeah, I got these a particular vendor, then automatically, I have some service trade. I have some service trade vendors that I set up other testing.

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

OZELLA

29:27 But then I also have heart sliders specific vendors into the guy that order from. So you can specify these are the ones that I want to have connected in my parts ledger. And then the same thing. We're talking about warehouses as soon as I select the warehouse source. And when I come over here to let you choose my main, my

truck. Well neither true. And then these are some alternate warehouses that I have setup for other purposes that are not connected parts. Like I don't want that in DC, but that's easier for... and half day.

*--- Accounting integrations ---*

OZELLA

30:03 So, so yeah, that part's ledger in a nutshell when it comes to the financials, I know you mentioned you're using things 300 and that whole bit, all of your information, that part pleasure service trade will then flow through our connector team stage or your accounting system, you would have a separate subscription for your stack connect here and that sent over po information to that system.

*--- Accounting integrations ends ---*

OZELLA

30:33 So that's kind of a separate workflow. But for this intended purpose, right? You know, as long as you know that you're capturing everything that you need to capture here. Anything, you know, you've got the data?

BRET

30:47 Yeah, it will be an Sage intacct by the time meeting happens program.

OZELLA

30:54 Okay. Okay. That's good to know.

BRET

30:56 Subscriptions and all that?

CLINT

31:00 Hey, Brad, the, you know, when you guys plan on implementing now, this agent that?

OZELLA

31:05 Is the...

BRET

31:05 Signing off on that within the week here? They're just going back and forth on details.

CLINT

31:13 Yeah, we have a great relationship with them too. So if that's something that you want to see like the intricacies of that, we can have another phone call on that in regards because I know we do have a great, like I said relationship with Intacct, because we even have a lot of customers that assets that are in the same position as

you and say, you know, say 300 is, you know, it's a little bit older ERP system, that type of thing.

*--- Accounting integrations ---*

CLINT

31:40 Do you have any recommendations where we should go? So, you know, we've recommended quite a few companies going towards that Sage intacct. So that would not be an issue if you decided to move forward with us as well. So, yeah, no problem. I know we've only talking about the stage 300 integration.

BRET

31:57 Yeah. Yeah. No, we were pretty much focus on doing it within tack this whole time. That's kind of what opened up... the new rounds of demos because I was switching as to Quickbooks in the gardening management with Adam and he wanted to stick with Sage and kind of change the whole makeup of where we were doing. They had a program already selected ready to run. You know, are we going to integrate with Sage? So.

CLINT

32:27 Are you guys looking to sign off on... your service module as well? What you guys decide to go with? Since you guys are already signing off on?

BRET

32:36 But yeah, that's why I'm so heavy on demos. And now you only have one more program to look at. And like I said, I've talked with them for years because they've had to use them with my major accounts, but we will be B as in tact doesn't have a strong built in service module. So we need to make a, we need a new machine.

*--- Accounting integrations ends ---*

OZELLA

32:55 Yeah.

CLINT

32:56 Yeah.

OZELLA

32:56 Partner with Intacct. And we do have a really great integration with them and you can configure that basically natively within service trade for the accounting side of things.

BRET

33:08 That's kinda like the big follow up with Dan and you guys are very strong on the service, but Adam more towards like preventive maintenance type of service which

we're going to be getting more into that for major part of my business, the small projects.

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

BRET

33:22 And that's why he was touching on that at the beginning of the demo. But your personal injury is a big piece of my controls I need to have in security because without parts ledger service trade seem kind of like loose on the text is right? A po and put it on their work order. And that's how this place was when I got here. And, you know, those... little scary lotta guys buying stuff for their side jobs and hobbies, you know, run out the home depot card and they will increase or margins about four percent, made this clean that up. I don't want to lose that control. I need to have, you know, this inventory control built into whatever we select.

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

CLINT

34:12 So based off of seeing that part's ledger, and obviously, you saw our first demo service trade, what would you see that? I mean compared the BuildOps? Because I'm only going to speak up. The other one that you've spoken about. I know yet really got into kriegler that often. What do you think besides parcel ID or you said that, you know, we're definitely ahead of the game on BuildOps. What would you say in your opinion if anything, is there anything that BuildOps has on what you've seen the service trade so far?

BRET

34:43 Just the project management side.

*--- Type of work ---*

BRET

34:45 So they have a whole nother on it first, larger projects, that, and small projects. So like their service component as small projects and service built in very well. And then there's like a connector to larger projects which we do a lot of in generates with reports, have everything all in one interface... that's their biggest advantage is, you know, having that extra little time of projects because it helps.

CLINT

35:19 The reason I said that like.

BRET

35:21 How long?

CLINT

35:22 Hello, me, your projects going forth, some of the especially projects?

BRET

35:27 They average two weeks to two months at the most.

CLINT

35:33 Right. So you only be running a two month project at the most?

BRET

35:38 Yeah, on average. Yes.

CLINT

35:40 Okay. Yeah. The reason I said that will be able to walk, go ahead Bret.

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

BRET

35:45 And once they get bigger than that, we put them on our pro core or other like project management software.

CLINT

35:52 Gotcha. Yeah, that's what I thought you guys are doing because you're talking about pro core last time and that's one of our partners as well. So we have a couple of partners in that type of field depending on how big you want to go with. But the reason I wanted to match see what BuildOps ad is because a lot of people don't know because we're starting to roll it out right now. We've started a project management piece. And the reason that I ask what size are you doing? Is because we're not trying to replace pro core. We're not trying to get into the same ball game is now, but we do know that there's a little niche in between service, the big projects that a lot of people are missing. So we can walk over a couple of little things here. Now, some of it's just rolled out. Some of it is an alpha testing right now and we're continuing to build. I don't know an exact time and I don't pretend to at like I know, but I would think by the end of the year, it would be close to, you know, getting to where everything is done. And so the next step it's going now that's already out to our customers, we have some filtering that we can do as far as looking at days weeks, that type of thing. Also budgeting is really big. That just came out right now. The, with reporting that you mentioned is the next thing to kind of roll out as well.

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

CLINT

37:09 There's progress billing. If you're gonna do a lot of that progress and billing. And then the end it all off is going to be change orders. So as you're doing these evaluations, we'll be able to show you a little bit of it today. But like you said, as far as getting intact and you're looking to get, you know, another decision made.

*--- Implementation and ongoing support ---*

CLINT

37:28 You're probably based off of our available time, whatever a month or so, two months before we get that information in implementation going. So by the time you're ready to go live with service trade, I think you'll have all that other stuff that you need. Like I said, I can't guarantee it. But based off the timeframe and what our developers have been able to pull off, it looks really good.

--- Implementation and ongoing support ends ---

BRET

37:53 Okay. Yeah, no, I...

CLINT

37:54 Just want to throw that food for thought because we haven't spoke about it too much.

BRET

37:58 Hello, you have something like Sage. He's gone a road map. You know, I'm good with that. I just wanna make sure can I do a lot of account managers. And so getting those guys to do their own update their jobs, you know, is very difficult especially if I gotta have the month to three systems. And so I'm trying to keep that down to two. Hi. Now I have a month three touch in one.

DAN

38:20 Yeah, definitely.

CLINT

38:21 Yeah. And I understand on that build up stuff will be able to keep you on one of those systems you keep in pro core. And then we'd be able to handle those special projects. The smaller ones like you said. And like I said, before you go, and you're going to have all this going and I already know what's on the roadmap and stuff has been coming sooner but you can already do the budget stuff now, which like I said, I can, we can walk you through that a little bit just to show you an idea of what that's doing. And then you already know about the web reporting. And I think just show him what I was showing your off that part's ledger stuff. You can see how intricate we'd like to get because people have different workflows and need to do things. So you can't just only scratched the surface. So we like to get a detailed stuff. So that's why we're trying to do that progress billing. And then obviously, I know change orders is a big deal as well. So all that stuff would be available for, you know, for you and do time?

BRET

39:15 Okay. Now you mentioned you partner with pro core. So is there a good time for us? Like scheduling our workers? And then they're working on a project that's tied with Sage and pro core? Yeah.

CLINT

39:27 Hello? Hello. Are you still on... jumped off unless the other one?

DAN

39:34 Dell is still on, I can pull up here the.

OZELLA

39:38 Sorry, I was muted.

BRET

39:40 Okay.

CLINT

39:42 A little bit onto that pro core partnership that we have any integrations?

OZELLA

39:49 Yeah. I missed the question. I'm sorry, I was setting up to show you the budget and so I started a new screen share. So what the pro core specific question? I'm sorry.

BRET

39:58 If we're able to like are self performing guys out of service trade? And then like data flows and the pro court all in terms of job costing the labor parts for self perform work. You guys hear me hey, in that time with your partnership or is it kind of just a topical passing on a job numbers?

OZELLA

40:22 Yeah. You know what? I'm not actually that in depth with the pro core integration, but I know that we do have some really great internal articles on it so I can share those with the guys the forward on. But I know it definitely speaks to, you know, different product information, time sheet information and things like that.

BRET

40:44 I like it might have something close.

CLINT

40:49 And I'll find out more information for you myself and Dan, I'll give him a little more intricate information on that and get it for you Bret.

BRET

40:58 Okay. I appreciate it.

OZELLA

41:02 Okay. Can you see my screen over an?

BRET

41:05 Yes.

OZELLA

41:06 Okay, great. Just to kind of introduce you a little bit to some of our budget management and project management features. So I went ahead and kind of spark a job over at service trade, just another quick demo that... and I've got my location information and all that good stuff year, you can insert customer po, information if they have any. And then there's this toggle that will ask you whether or not you want to create a budget for the job.

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

OZELLA

41:39 And so once you've set that up, it kind of opens up a whole other... features. So we'll save that. So now we see that we've got this new option that says create a budget with the job.

OZELLA

41:58 And when we click that are presented with this nice little button to add budget and we can pick either a high level budget or granular budget... and you can kind of see here what that does in terms of the high level budget just kinda goes by item type. And then in your budget goes more in line, item by item and then also segmented by service. So I'll actually start by adding some items just so that we have a little bit more to work with.

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

OZELLA

42:44 It can some really random stuff here. But let's see.

*--- Recurring maintenance ---*

OZELLA

43:06 So right away, you can see that it's that my point is it just pulls everything straight over from the job. And right now we don't have any services outline, but we can always add services and we can drag and drop... between any services, any number of services that we have on the job and you can break that out. You know, you can kind of treat your services like phases if you will.

*--- Recurring maintenance ends ---*

OZELLA

43:39 So really kind of allows you some flexibility.

*--- Recurring maintenance ---*

BRET



43:53 I guess that's how you guys separate your like individual services are tasked with maybe an appointments, right? Like you have a main work quarter and then it's appointments or can you do tylenol?

OZELLA

44:07 So, yeah, it's the work order and then appointments within the appointments. You can have multiple services. So, you know, I can have one appointment and I can have five and 50, however many services underneath that.

*--- Recurring maintenance ends ---*

BRET

44:26 And they asked me because one thing that we like to do is be able to separate out, you know, the subs... electricians, versus my carpenters and they all have their own... ticket or appointment. And then I'll build against that one job or we're quarter.

OZELLA

44:43 Yeah. So you can assign different technician, sure... different ones like that.

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

OZELLA

44:52 You know, we can keep going until there's not a limit to how many services we can add to an appointment or how many appointments you can add to your job.

BRET

45:01 Perfect. Yeah.

OZELLA

45:02 Yeah. Well, yeah. I mean, that kind of that's very high level. But right now, you can see, you know, this budget is unlocked because it's still being drafted.

*--- Quote templates ---*

OZELLA

45:11 You can come in here, edit and you can add more items for the budget. You know, I have this additional service section that I opened up and I can add more to it. You know, I can say that I want to add... something... you know, I can add more parts.

OZELLA

45:40 Add some complicated labor. You know, I can do a lot here and I can say, okay, well, this is how much I plan on spending.

OZELLA

45:56 So that's the budget. And then of course, the price needs to get done it out. I haven't done that yet. But if I go in here, I can say, okay, well, my price, this is my cost, my budget. And now I want my price here. Would it be, you know... no one is 700 for that? I'm just gonna go and filling in some, get some more for you to be able to look at here? Yeah.

OZELLA

46:29 And so then you can see, okay, we'll be for my part, this is how much I'm spending my labor. This is how much I'm spending and it's pulling based on the item type in service trade and service trade gives you a few different item types are flavor material equipment, see different things like that.

--- Pricing ---

OZELLA

46:48 You could include fees here. You could say, hey, I'm budgeting for, you know, here for the first text, I might have some fees, you know, if I want to add a documentation fee and there's going to be 15 for that you can do. And then you can see your break out.

--- Pricing ends ---

OZELLA

47:10 And then once everything looks good, you can say, okay, well, yeah, it looks good thing. I think doesn't have revenue information. It's not gonna let me finalized like you. So let me make sure I handle that. I'm gonna call that right now. Yeah. So I'm warning flag this gone. You can also see who's made updates as a nice little audit log there... as well. Yeah.

--- Purchase decision ---

CLINT

47:46 How does that sound fair Bret to what you saw earlier and build up?

BRET

47:52 The graphics are better... pretty much on par.

CLINT

48:00 Accomplishing the same type of thing that you didn't think service trade had. But obviously, with this stuff coming out, at least you're crossing the TS and Datanyze on that.

--- Type of work ---

BRET

48:11 Yeah. And then, so as we, as the guys logger usage, it goes against the budget that's you know, that's just the biggest thing I was looking for because that's the majority of our work is, you know, the... small jobs.

DAN

48:28 And just kind of reiterate, I'm sorry, Bret, I didn't mean to cut you off there.

BRET

48:33 I was.

DAN

48:34 Okay. Yeah. And like Bret mentioned, you know, we're rolling out more detailed details with this but, you know, to two weeks to two months. I'm glad you said, you know, your projects are only that long, the ones you're trying to manage because I mean, our customers have been managing those types of projects or service trade for the last 12 years. So these are things that we're building into the application... to help improve on that. So it's only gonna get better from here the, you know, we consider those kinds of service projects anyway. So it's definitely not something that you'd be, you know, blocked out of doing even without some of the stuff that's come in here in queue three.

--- Dispatch ---

BRET

49:19 That's good to see.

OZELLA

49:23 Great. So, so we do have this capability already, you know, live within the UI and then you also have the ability to kind of filter. So if you do have a job that has, you know, many different appointments and let's say you're using these appointments to kind of block out for users and multiple services per phase, right? You, this one scheduled for, you know, next week. And then this one is scheduled to begin in two weeks or whatever. You can come back here and you can filter. So you're only looking at appointments and services within a time period and you can go ahead and filter by that. You can use a quick preset what's due tomorrow or next week and filter the page. I don't have anything do. So now you see it's gone blank.

BRET

50:05 Yeah.

OZELLA

50:07 So that just came to allows you to be able to work with that.

BRET

50:15 Okay. And so in theory, like you have a good day, have an appointment like that for that week and then have one for two, you know, two, three weeks later and it can be blocked out for another week and it happens to be a good one day at a time. Is that's an appointment? It can be any duration of time?

--- *Dispatch ends* ---

OZELLA

50:37 Hello, correct. Yep.

BRET

50:41 Okay.

OZELLA

50:42 Any other questions? Is there anything else that's kind of top of mind for you that I can help with or plant? So anything else?

BRET

50:52 You have any samples on here where you can see like some cost is already hit it and what the screen looks like... and kind of made a budget and he's created job.

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

BRET

51:01 Do you have any like a open samples that you can see? Like what something, what looks like with some progress on it?

OZELLA

51:08 Like with some jobs create or actually some of it's completed?

BRET

51:13 Yeah.

OZELLA

51:15 So, I don't I literally just spend this kind of on the fly. We'll work through that?

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

BRET

51:21 And all this functionality is live already. And then you just working on the development of?

OZELLA

51:26 Hi, miss this, what I'm showing you right now it is currently live.

BRET

51:32 And you guys are just working on like with in progress and billings from what I gather.

OZELLA

51:37 Yeah. So it's a few different pieces, right?

*--- Dispatch ---*

OZELLA

51:40 So well, the first kind of phase a bit with being able to kind of view jobs at this service level and, you know, having the ability to have multiple services where you can view, you know, different services within an appointment and then filter attachments by service and things like that.

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

OZELLA

51:59 And then kind of moving from there to be able to look at the job ID and things like that. And then adding the budget and being able to show you kind of detailed budget view where you can view the high level budget, whether granular budget. When looking at this granular budget... you know, to pay to have that type of flexibility and then moving on from there would be no more detailed visibility within the invoices and things like that. So it's definitely going to continue to progress, you know, being able to accommodate change orders and things like that. It's all kind of in the paid for being able to handle project management.

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

BRET

52:42 Okay. And then in the setup, there's a little button for utilize a server that don't allow it. So if you check that box off, does that allow you to have a mixture of self performed and so contractors on a project or?

OZELLA

53:00 And have sub contractors... you can have sub contractors.

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

OZELLA

53:06 When you're setting up the job, it allows you to do that. And I wanna make sure that I'm understanding your question, you're just asking whether or not you can do both like sub contractor jobs versus non SEP. I've had two jobs or?

BRET

53:20 I'm sorry, I got interrupted. Sometimes you just have a mixture... like you're saying sometimes one or the other, I was wondering if it, if you open that up, does it change the functionality of what you just, you know, one or is it just kinda give you more options to be able to... budget for one of them?

DAN

53:41 Or sub contracting part of the job?

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

BRET

53:43 Yes, thanks. For instance, right now, I'm on a executive office remodel and... I have a fire sprinkler guy and I have a flooring guy and we're still performing all the carpet dream electrical.

CLINT

53:59 Gotcha. Yeah, I believe, I know you gotta go real quick. Yeah, go back to that managed job.

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

CLINT

54:07 Go back, one... managed job and upper right corner. When you go down to the bottom, see how it says, do not use a sub contractor user. So contractor that's where we can add those in to that budget, you can go in and then have this on the vendor details and different things. We can go add those in... but you would have the list of different sub contractors like you're doing planning sheet metal or whatever the case may be. So, yeah, you'd be able to add them in there if there's going to be sub contractors on this job. So if you're going to add and then within this.

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

DAN

54:45 And then your subcontractors.

CLINT

54:47 Hello, I know you've gotta jump off or zillow?

OZELLA

54:49 I do. If there.

CLINT

54:52 Go ahead, go ahead and jump off. I'll take care of this.

OZELLA

54:54 Thank you so much. Alright, bye guys.

BRET

54:56 Thank you.

DAN

54:56 Yep. Thanks.

OZELLA

54:58 Thank you in, Dan. I actually need you to kick me out.

--- Dispatch ---

DAN

55:01 Hello? Hi. Yep. Hang on one second.

CLINT

55:05 Sure.

DAN

55:09 Alright. Cool. Bye bye.

CLINT

55:14 Hi, Dan. Sorry, I didn't mean to cut you off. I knew she have any.

DAN

55:17 No, yeah. Thank you for that. Alright. So, yeah, here, I can kind of pick up where we dropped off there, but I think what I was, all I was about to say with essentially so services and you may have already understood this from what we've gone through, their Bret, just shared my screen by the way it's got, you should see job number two five up here.

--- Recurring maintenance ---

BRET

55:37 Yes.

DAN

55:38 Cool. Yeah. So with some contractors, you can especially subcontract out different services. So like you were mentioning the carpet, any service has it specific set up. So here's a service right here for example, and that service has its own parts items and costs associated to it as well as general information.

--- Recurring maintenance ends ---

DAN

56:00 So each service can be subcontracted or like we were talking about earlier, different appointments for different technicians and that type of thing.

BRET

56:09 Yeah. Yeah. I was just kinda auditors that the way the buttons was configured, I didn't know if it like a locked it up or it's like sub or know serve and, you know?

--- ST app contracts and pricing ---

DAN

56:20 Gotcha. Yeah.

BRET

56:20 You click the select so you don't have the budget for south performing or if the CMS up performer create a detailed budget, but, and now you're locked off and serving it because you don't have a budget for us... because like right now, you can only pick one guy. So it's... kinda weird.

DAN

56:39 You shouldn't be blocked off from a tab whenever you've got a budget.

BRET

56:45 Because like I mentioned, like we, you know, it'll be two, three subs on a job. And right now, it's like a drop-down with just one. And so we're a business that you have a workaround where I made a budget, but yeah, I subbed out these line item.

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

DAN

57:00 Gotcha. So having multiple sub contractors on one job?

BRET

57:06 Yes.

DAN

57:07 Okay. Yeah, I can confirm that we can do that. I wouldn't see it being an issue, but I see what you're saying here. It's got only one drop-down so, if I need to add a second subcontractor, how would I do that? And to be quite honest with you, I don't know the answer so, but I can certainly find it out.

--- Accounting integrations ---



BRET

57:25 Okay. Yeah. I can envision a workaround. It's just, it's kind of, this is kind of a weird interface real quick goes, you know, the Sage 300 interface for me or like I get two options and.

DAN

57:38 Gotcha. Okay. Yeah.

CLINT

57:41 This is newer to else to Bret because this is, you know, getting rolled out.

*--- Accounting integrations ends ---*

CLINT

57:46 So, you know, how does the sales guys are always last to find out everything? I can say. I don't want to sell on it until it's ready. So, yeah, we'll find out about that. I would be shocked because we deal with other customers as well that do the same thing. I mean, I have some pipe fitter is they will have some sheet metal guys and they'll have all different kinds of stuff. So, yeah, I don't see it being an issue, but we'll definitely find out exactly the answer to that for you.

BRET

58:14 Okay, good.

DAN

58:16 Yeah, yeah, welcome. Adam. By the way, I liked that had they're looking good?

DAN

58:27 Yeah.

ADAM

58:30 Hi, I'm muted, but thank you. I know.

BRET

58:32 Slower...

ADAM

58:33 Season, but... this picture up here must have been me.

CLINT

58:38 Christmas all year round.

ADAM

58:40 Yeah.

DAN

58:42 It was never a bad time to where I was saying I had, so let's play that mentioned, right? We've got tons of customers that do the exact same thing that you guys do. And I think this might be an interesting report for you guys. Take a look at. We just released this data growth metrics report based on our customers data over the last two years. So 2020 and 2021, only now we've been in business for 12 years, but in the last two years, 6,000,000 work orders over 6,000,000,000 dollars in revenue invoice through service trade and over a 1,000,000 quotes.

--- Purchase decision ---

DAN

59:18 So this may be an interesting article for you guys kinda to review as you're deciding who to go new partnership with. Would that make sense for me to send this over to you guys?

BRET

59:30 Me, interesting look at?

DAN

59:32 Okay.

DAN

59:37 And let's see here. I'm looking at my list of things that we wanted to address today. Is there anything else... top of mind as far as follow up questions that you guys have currently?

BRET

59:54 Just kinda going over the emails to as I was kinda skimming before we did that. Okay?

--- Tech time tracking ---

BRET

1:00:14 Think I touched on everything. We didn't follow up on how time cards work in that data flows.

DAN

1:00:26 Enrich data for, I love it. I was just how time card work in general?

BRET

1:00:32 Yeah. Got it. So we got, you know, two, three text science that do all three of them clock in and out onto there on the app and does that create a time card in

enough data to be able to flow into a payroll system?

--- Accounting ---

BRET

1:00:50 Pretty common? What I'm hearing is a lot of like, you know, it does it, but it's a CSV file. How do your clients deal with payroll?

DAN

1:01:01 Yeah. So if you're using Sage intacct, let me just double check this.

DAN

1:01:12 She'll be able to export that. I would have to confirm if you guys are moving over to Sage intacct. But let me pull up a template that I believe I have here for time card... so.

--- Accounting integrations ---

CLINT

1:01:26 I'm working on the integration with Intacct to make it better than just like I can't say that it's going to be better than the CSV file because I don't know exactly, but I know with our partnership that they've been working on some skin type integration. So unless Dan knows more than I do, I can also talk to Tanya, Dan southern cards to see exactly how that would look since you guys are moving over to Intacct.

--- Accounting integrations ends ---

CLINT

1:01:53 I know we weren't sure it first, so we were just talking about the Sage integration, but yeah, you can go ahead Dan with what you're looking at now, but I'll find out more within tack.

DAN

1:02:06 Hello. Yeah. So kind of a simplified overview here. And I did send over some videos as well walking through each, but I think I did the link to those videos.

--- Tech time tracking ---

DAN

1:02:14 If I did not, I will definitely resend them but it goes through the technician workflow, the office workflow, and then how you guys would receive that into your accounting system as well. I think there's four videos they're actually. So they're each about two minutes long but simplified overview here, basically the time card. So each tech would have their own time entry, really it back to whichever job it was no matter how many different appointments or jobs you had or, I mean, sorry texts you had on

that one job, they would all have their own time sheets review. And so you could also look at that text time card simplified just that one technician, right? So you're not gonna have to work off of a work order or job to find that information, but it will all be sunk back to the job that it was logged in. So once they submit their time, whenever they're doing that weekly out, are they typically submit their time? Remind me?

BRET

1:03:08 Right now, they're using pay calm. And so these clock in and out as they go. And then they review their time on Wednesdays and Mondays. Okay. That locks it up.

DAN

1:03:20 Gotcha. Yeah. So the tech would basically go into the service time card module and service trade and they could look at all their clock activity from the week and then log their time. They could do that daily. They could do that after each job. And once they hit submit, the office takes a look, make sure it lines up next to first, what your billing, the customer, how much time the tech was actually on site, so on and so forth make sure it all make sense, right? So it's going to have the line there for the job... how much the customers getting build, how much the tech is essentially charging you altogether. And then you just approve that, and I think you're right? It typically is something like a CSV export, but there could be something that I don't know.

--- Accounting ---

DAN

1:04:05 Yeah, we'll put in follow up to see if there's a better way to import that into Sage intacct. Because I know Sage intacct is very friendly being a cloud based system and very new. So it's very open to working with other system.

BRET

1:04:18 You talked to any existing payroll companies right now? Like adp, Paychex, any of those groups?

--- Accounting integrations ---

DAN

1:04:28 That's a good question. Are we partners with the, with any payroll companies plant? You know?

CLINT

1:04:35 Don't know off the top of my head because usually it's ran through something going through their ERP, but we are an open API. So if they pay friendly, you know, we can connect you with about anything that has an open API, but I'll we can get that information as well if we already have payroll company. Are you guys looking for a new?

BRET

1:04:55 We will be because we're switching to intact and pay, calm does not have any direct communication with Intacct. So, pretty sure Robin switching.

CLINT

1:05:04 You want, yeah, let me find out one of our partners or whatever with Sage intact. Since we have a good relationship with them. And then that'll be good to get some knowledge from what partners are you guys using for Sage intact? Let me see if it's one of our.

*--- Accounting integrations ends ---*

BRET

1:05:19 Well, I think Adam's leaning towards adp because they're the big, you know, the big one that's out there and can cover everything with the two.

CLINT

1:05:27 Hello?

BRET

1:05:28 Hi.

CLINT

1:05:28 Throw that on there. But I'm talking about the partner, you're working through calm, Sage intact, are you guys going direct to stage?

ADAM

1:05:37 It's alliance solutions group Nicole?

CLINT

1:05:40 So... and he, was it, Nick?

ADAM

1:05:44 Nicole with alliance?

CLINT

1:05:47 Yeah, I think I'm almost a 1,000 sure alignment is one of our good partner. So it's good to usually put both people in touch or whatever and they're familiar with us. So let me find out some more information on that.

*--- Accounting integrations ---*

CLINT

1:06:02 But I'll say that you guys are looking more towards adp but I'll also talk internally what some of our customers are using and how it's integrated and how it works and talks and all that stuff to make it as seamless as possible for you. Is that fair enough?

--- Accounting integrations ends ---

BRET

1:06:17 Yeah. Okay.

CLINT

1:06:18 Okay... perfect. Awesome. And Dan, I'm gonna have to jump off. I gotta jump into another meeting that I'm late for. But Bret, Adam, thank you guys so much. I know you're in good hands with Dan and then after he's done talking with you guys and I'm done with my meeting, he'll let me know what next steps are, and I'd love to still come out and visit you guys and things of that sort. So hopefully that's what it would come down to him via.

BRET

1:06:49 Thank you.

ADAM

1:06:50 Great. Thank you.

CLINT

1:06:52 Thank you guys.

BRET

1:06:53 Alright, bye.

DAN

1:06:54 Awesome. Well, yeah, gentleman. So as far as, and Della just sent me this link over as far as an overview of pro core and I can send you this video as well, but kind of looks over the integration thinking projects and time logged in service trade sync back to a project and that type of thing.

--- Accounting integrations ---

DAN

1:07:16 And I also have another document I can send for the pro core integration. So a couple of things I have for action items on my side, it looks like is looking into Sage intacct payroll and sort of the wait service trade is going to communicate with that and the time card process, sub contractors, multiple sub contractors I'm on a small project.

DAN

1:07:39 Is that possible? And let's see clients gonna follow up with you there... on some of the Sage information as well. What else have we? I know that you've got a meeting with curry, go next week or possibly this week? What else do we need to cover for you guys to feel comfortable to, you know, move forward?

BRET

1:08:06 Let's say once a demo, that one, it might just be like a little find TUNE and make sure things are, you know, communicating well or like the workflows there. So I'd have like maybe one more demo with my service manager and make sure they like feeling communication there.

--- Parts management (inventory) ---

BRET

1:08:24 I want narrowed down to two. But then let some of my, you know, admin staff kind of look at it to see like what the, what works well for them. And then the cost is a big one because like I'm your parts ledger is great but it's a bolt on and another, you know, costs on top of it.

--- Parts management (inventory) ends ---

BRET

1:08:41 Like your price is already at the, you know, the high range of where everybody else is that, but they've got that built in. So that would be a talking point service. What you guys are, you know, great, glad to hear a lot of the push notifications and, you know, the visuals are awesome. But, you know, the cost would be the one thing that make sure everything's tied together because I wouldn't want to Ben top dollar, not have my inventory control and... probably like the toughest piece of it all. Like operations wise, it looks like it does everything we need.

DAN

1:09:20 Okay. Well.

--- Accounting integrations ---

ADAM

1:09:22 Yeah. Yeah. I think the obviously cost is a big impact. But for me, the important parts of the integrations, and then also as far as a demo in the other platforms, you know, there's... no matter what everyone's business operates different. So, you know, every platform is gonna have a lot of what we need.

--- Parts management (inventory) ---

ADAM

1:09:44 And there's gonna be one item that's missing, right? Every program is at least one item that's missing or like, damn it, I wish it had that, but I think that the decision maker is which one is our lease prior and is least has the less impact on double entries or what sort on our end. That's kinda be a real decision maker, obviously cost functionality, but whichever one has the least amount of that one item that it's missing... for our operation. So, but again, that's where we have to just look at all the programs and kind of just see which one really levels out. And then it just kinda opens up some of the things that, you know, we think about that we would want and haven't needed or had but would actually work for us really well too. So.

DAN

1:10:31 Yeah, absolutely. Yeah. I mean, that's a great point and nothing's going to be perfect. You know, definitely... yeah, no, you're never gonna find the perfect fit almost so completely. Understand that. As far as, you know, what we went over today, it looks like parts ledger. I think this is before you joined to Adam, but park pleasure, st, Bret, seem to, you know, like that quite a bit. It took care of the generating a po that we had, you know, it was kind of left up in the air loose. Last time when we looked at just service. Great. I'm also allow them to, you know, see the stock of trucks as well as warehouses from anywhere. So attack when they can pull up truck stock and pick up those parts an item. So it looks like that was a positive from the meeting today, talking about cost... just so I could put together now that we've gone through this and it does look like parks ledger. Obviously Bret would be something you would have to include to be able to go with service trade that's right?

--- Tech time tracking ---

BRET

1:11:31 Yes.

DAN

1:11:32 Okay. Cool. So talking about cost, how many mobile users remind me, would it be that you envision starting with service trade?

BRET

1:11:41 Mobile users? 28?

DAN

1:11:45 Okay. So you got 28 feel texts that are completing work?

BRET

1:11:53 They're clocking in and clocking out. So in terms of actually doing service tickets, you know, there's 14 of them within there's to 10 helpers working alongside them that needs to be able to clock in and clock out. They have their time in the job.

--- Pricing ---

DAN



1:12:09 Okay. Yeah. Well, we've actually got a helper functionality. So that would be, I'm glad I double check there. So you might not need the full... technician license for all 28. So it sounds like for 14 lead tech?

BRET

1:12:23 Yes.

DAN

1:12:25 And the helper functionality actually is pretty good too.

*--- Tech time tracking ---*

DAN

1:12:28 They can add pictures and attachments to a job as well. If you give them the permission to do that and a few other things that they can do basically just get their schedule though, and then they clock in and clock out, they use the time card portion. But yeah. So it sounds like?

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

BRET

1:12:46 Yeah. And then do we need to have a license or something to allow for the sub contractors to use the app?

DAN

1:12:54 No, no license required there. Yeah, that's actually something I found out after our meeting last time was sub contracting is free completely for them to get on the platform and use.

*--- Access to information ---*

DAN

1:13:06 So they could use the mobile application to complete job and service trade. That way they're able to collect the, you know, photos and data and information that you need and your customers are gonna want. And so you can also see the proof of, you know, the job, the work they're doing for you. So they can use the app. It'll just be limited to, you know, the jobs that you saw contract to them. They're not gonna have any other functionality... in the app, but they can use the mobile app and the.

BRET

1:13:34 Okay. And then when they send us an invoice, is that then, and Sage, or do we, are we able to capture costs in service trade?

*--- Invoicing ---*

DAN

1:13:42 Yep. You can capture cost in service trade. So they just market complete and you could view it right there.

BRET

1:13:47 The market complete and we input their invoice manually.

DAN

1:13:53 That's a great question. So, how are they doing it now? Did they send an invoice to, from their accounting system or?

--- Accounting ---

BRET

1:14:01 Yeah. The email or mail or an invoice, we manually input it service manager, and then Sage timberline, because right now, they don't we don't have our connectors set from service to county.

DAN

1:14:16 Okay. So I mean, they could put down any job notes and costs notes on that job.

--- Invoicing ---

DAN

1:14:24 It's I mean, I'm thinking they would have to also now create their own invoice for tracking on their side and send that over to you. Yeah.

DAN

1:14:43 As far as checking that back to the job or whatnot that could be in your, you know, in service trade. And I'll mark that as something to follow up to.

--- Invoicing ends ---

DAN

1:14:50 If we still have those Della here with us, you would probably know the best answer to that, but I'm invoicing for sub contract, the job just out of curiosity, I remember you mentioned last time it was a big deal to be able to sub contract like that. Did BuildOps have that capability?

BRET

1:15:10 That's neat. They had the sub contractors on there, I don't know if the sub contractors can build directly onto BuildOps so that's a followup all have with them. If I follow up with them?

DAN

1:15:24 With the sub contractors, they can use BuildOps application and all that.

BRET

1:15:28 Yes.

DAN

1:15:29 Okay. Interesting.

BRET

1:15:31 Yeah, same thing with curry go. I've used that quite a bit because both of our groups were logged onto there. So my construction group again warranty calls and they'd send them to me and, you know, we're able to communicate or for them to it's and they can update it. But we're only on like the vendor side of it. But once you're on the enterprise side and they're actually able to come in and invoice it to on that.

DAN

1:15:57 Gotcha. Okay. Well, let's see here.

BRET

1:16:04 This and trying to eliminate double entry and that's kind of what holds up our team sometimes from billing it is they're waiting and make sure that the bills when you got most plumbing and they take a week or two to Bill you and you're calling for the.

DAN

1:16:19 That's a great point. I would imagine they'd be able to complete job and create invoice through service paid the same as you guys would and send that to you.

BRET

1:16:27 Okay. That's some of the find TUNE stuff. I'd say that like if I'm down in my last two years, like those are all the little things that, you know, going through it, we're kind of double entry or read favoring on or planning on like, hey, what's on the roadmap for you guys? So we can... try to be as streamlined as possible.

DAN

1:16:51 I think you mentioned interesting to, you know, there's only so much double data entry that you can cut back on at some point. You know, a human got to touch the button and there's only so fast. You can get, you know, you're always gonna have to have technicians doing the actual work in the field.

--- Customer engagement ---

DAN

1:17:07 You know, they can only get so fast. But the difference and really what our platform has been built around is engaging with your customers. Something you said

earlier was some of service trade. I think you said looks a little sleeker, it has a lot of push buttons and good interaction tools with the customer. I don't know, correct me if I'm wrong there, but seems like that was something that stood out to you.

BRET

1:17:32 Yep. Yeah, push notifications not buttons, but, you know, in terms of how you can automate some communication, the clients, you know, keep touch on that client, let them keep them in the loop. That's you know, that's where you can see, you guys focuses on that service side of it in that, you know, that beginning piece was very sleek and, you know, it's gonna help a lot and, you know, we're saving and double entry what we're going to be creating a lot more intrigued by, you know, inventories and... lot more entry, but a lot more control, lot more transparency to the text, the material on site material available.

--- *Paper process* ---

BRET

1:18:10 So... it's gotten out of it figured out here.

DAN

1:18:18 Cool. Yeah, I think that's a big part of the growth you know, that our customers see is through the interaction there in, you know, you can think of it as kind of a time saver too, and you're able to follow up and, you know, send out bulk reminders and such customers.

--- *Paper process ends* ---

DAN

1:18:31 It's gonna cut back on the amount of phone traffic you get customers calling in and asking for information. And we haven't looked at the portal, much heavy or.

BRET

1:18:43 And don't believe we have.

DAN

1:18:45 Okay. Yeah, I'm curious to, you know, I don't think BuildOps offers that. And I should have definitely shown you this sooner. But just so you can kind of see a few of the ways that we are different. So you can weigh out those pros and cons when you're having those conversations. The payroll is going to be something you're able to plug into the top of your website here. And I can actually pull up one of our customers.

--- *Recurring maintenance* ---

DAN

1:19:09 So you set this up however you'd like, but a little finance spot for the customer... and when they log in, they can look at all of their locations, previous service calls, they can request service from you. So if you've got a property

management group or a vendor with, you know, multiple locations, they can drill down and find a location, the services three for that location, pay invoices... you service detail.

--- *Customer engagement* ---

DAN

1:19:43 So this is sort of their hub and it's a great way that you guys become really sticky with your customers is allowing them to easily, you know, request service, easily access all of their equipment information and see all the value that you guys have provided for him in the past.

--- *Customer engagement ends* ---

DAN

1:20:00 Difficult to think about going somewhere else when you, when you've got so much built with someone already. So the great way to be sticky with your customers. I'll send over a short video snippet on that as well. When would make sense for us to reconnect?

BRET

1:20:21 Easy next.

BRET

1:20:30 I say for like June first and second.

DAN

1:20:35 Okay. Gotcha. So I believe in that time, I think you had mentioned Adam is going to be looking to finish out some details with Sage intact and you've got the career GoToMeeting obviously.

BRET

1:20:51 Yeah. We got a holiday next week. So short week people would be right around. I, so I didn't want to say, you know, sometime next week?

DAN

1:21:00 Yeah.

BRET

1:21:01 No, that's not the holiday. The week the thirteenth is holiday.

DAN

1:21:05 Okay. Well, beyond that, it's two weeks out. Probably don't know exactly what your calendars look like there, but we can aim for, you know, a June early, you know, first week of June follow up meeting there. Would it make sense for me to, you know,

give you a ring next week and just see if we could get plant onsite with you to go over? I think you mentioned one of the steps you'd wanna take is having your field manager take a look at this with you and have some of the admin folks. If there's a day where you could maybe pull two of those lead folks, it can be really easy for them to get a feel for the platform with plant in person. I don't know if that sounds like something that would be helpful for you?

BRET

1:21:48 You want to follow up next week and see if we could book that. We still be the same same days they're using Wednesday. Thursdays are a little more calm for us. Okay? That's the week of memorial week. So Tuesday is going to be on Monday.

DAN

1:22:03 Gotcha. So Wednesday Thursday of that first week of June, sounds like. Yeah. So I'll give you a call next week and we can try to make a plan, see if that'll work out. Obviously, feel free to reach out to me in between if you've got any questions and I'll send a follow up email here shortly with some of the information we discussed. Was there anything else that I can provide today?

BRET

1:22:32 No, I think we kind of touched on a like you said you're gonna send us a couple of videos to look at some more of the details and flag the email you sent the videos for the payroll.

--- Purchase decision ---

BRET

1:22:42 So I'm definitely dig into that. I just gotta start compiling some of my chicken scratch from all these demos and kinda see where we're at with, you know, our likes, dislikes, something, you know, now we are some better feedback for you and check in next week.

DAN

1:22:59 Cool. Yeah. Sounds great. Adam. Anything on your side that would be helpful for you?

--- Purchase decision ends ---

ADAM

1:23:05 No, this is Bret wheelhouse. So I've given my critical items that I wanna make sure work and that is the integration and it knows the rest of it which is obviously everything is going over. So federal actions, push notifications... user access or user ability is obviously important. But again, I think Bret and all that stuff.

--- Purchase decision ---

DAN

1:23:31 Okay. So it kind of sounds like the motion of this. Yeah. And he told me if I'm wrong, but we kind of want to start off with Bret, you know, what his decision is and, you know, as far as which platform he'd like to go with at the end of the day, I know it has a lot to do with the integration. So sure, you know, if they, you know, if one platform doesn't provide that and the other does then probably have to go that way, but that's kind of the last step is the good part is I do know that we offer an integration but would it make sense to kind of have, I guess finish out the steps as far as Bret determining which direction you'd like to go and then look at that integration or would you kind of like the commingle those?

--- *Purchase decision ends* ---

DAN

1:24:09 Because I think it would be valuable for us to set up a meeting to just look at that stage integration Adam and focused 100 percent on that with some of my accounting team member.

ADAM

1:24:20 Yeah. You know, I definitely would like to see the Intacct integration. I'm sure.

--- *Accounting integrations* ---

ADAM

1:24:26 Well, I guess I don't know Bret would be in anymore as much but I'm sure you'd like to see that part too, but... obviously focusing on we're only focusing on the companies that do integrate with Intacct. We're not really. We're not really going far from that, so.

DAN

1:24:43 Okay.

ADAM

1:24:44 At that point, you know, really it's all going to integrate, right? I mean, what will integrate would probably be the shorter you'll have shorter answer for us. So maybe just outline those items. What doesn't connect? If there's any major outline are outliers that don't integrate to there. And, you know, that other people have asked and they have to export them or whatever and input manually.

--- *Purchase decision* ---

ADAM

1:25:06 So... I would say Bret, what did you figure out for next week is another one. So maybe towards the end of next week, we'll circle up and maybe do the Sage Intacct demo connection.

BRET

1:25:21 Kind of where I was kinda the same assumption is you is everybody's on their marketplace saying they're fully integrated, so.

--- Accounting integrations ---

ADAM

1:25:29 Yeah, yeah, exactly. So I think we're on the same page with that. We're all pretty much, we know that all the companies were trying to look at have similar integrate a bunch of capabilities primarily. So, alright, well, I think service trade is a great program. Obviously cost is a big factor.

--- Pricing ---

ADAM

1:25:46 So if it's double the price of other ones, you know, sometimes we may have to sacrifice a little bit extra to save costs, you know? So sure all these programs these days don't get less expensive, they get more expensive every year too. So you get out. So after that.

--- Pricing ends ---

DAN

1:26:03 Yeah. And I know Sage intacct is a pretty Penny so.

ADAM

1:26:07 Hello, proud of their stuff. That's for sure.

DAN

1:26:11 Yeah. And I say, I don't know if I finish that conversation early. I did want to get a quote to you all because I know, I think the only pricing you have currently is from several months ago.

--- Access to information ---

DAN

1:26:19 Bret. And so I wanted to get an updated quote to you from what it sounds like. And so, you know, you can have as many office users as you'd like with service trade, as many administrative users as you need. They're all completely free the mobile technicians or what we've charged by what I've put up put together here.

--- Pricing ---

DAN

1:26:36 Looks like you'd have 14 full technician license, 14 mobile part schedule, you users, and then also 10 to 14 helper text. Is that about right?



BRET

1:26:49 Yes.

DAN

1:26:50 Okay. So I'll put together a quote for you based on that and, you know, if it's coming down to price and it's a few dollars, right? Obviously, it's not going to be five or 10 but, you know, this will be a... you know, we'd have to lose a great customer and I think you guys would be a great customer over a few 1,000 dollars. So I'm happy to, you know, open up the conversation there.

*--- Pricing ends ---*

DAN

1:27:13 So I'm looking forward to following up with you on the items on my list here and getting together hopefully by the end of next week to set up stage Intacct integration demo and talk about client, you know, coming on site to chat with your team there.

ADAM

1:27:31 Yeah, Dan. So I appreciate that. I know that, you know, JG companies here, we've been in business for 40 years. So, you know, that's obviously continuing on another 40 years moving forward. So, you know, we're going to be around, we've been around, we're going to be around. So, you know, whatever we go with right now is a long term solution. We don't plan to pick it for a year and test it out, see how it works. You know, it's going to be our 40 year platform plus. So... I know obviously that helps you guys as well. Longevity and sustainability is every businesses will. So, you know, just a little bit about that. That's where we're not looking to pick a short term program. We wanna make sure we made the right call for the longevity of company.

DAN

1:28:15 Yeah, we're not they traders over here, either that, that's our whole goal is to have a long term relationship. You know, to be honest with you a lot of times the first year for us, is it as, you know, very profitable for, you know, with you guys, right?

*--- Implementation and ongoing support ---*

DAN

1:28:28 Takes a lot to get you all up and running. So, a lot of resources, your project manager and such, right? So the whole profitability for us best come with that long term relationship as well. I think right now we've got a 96 percent retention rate. So got a lot of customers that have been with us a long time and continue to, you know, upgrade and sign on with us year after year. So definitely we're definitely on the same page there, Adam. Thank you for sharing that.

*--- Implementation and ongoing support ends ---*

ADAM

1:28:52 Perfect. Hi, Dan. Well, we'll be in touch and we'll get the next one scheduled after we get our, I think that's probably the last one coming up. So give or take. Sorry?

DAN

1:29:04 Good. Yeah, a lot of demos lately. Yeah. Well, thanks again, gentlemen for your time and look forward to catching up with you soon here.

BRET

1:29:14 Alright. Thank you. Bye, bye bye.

DAN

1:29:16 Bye.

*The End*