



ServiceTrade Demo with Lugaila Mechanical, Inc

Brett Griffith with Lugaila Mechanical, Inc
Recorded on 11/29/23 via Zoom, 1 hour 24 min.

Participants

SERVICETRADE

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Territory Manager

Chris Kidwell
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LUGAILA MECHANICAL, INC

Dave Sloan
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OTHER

CK Phone

Topics

| | |
|-------------------------------------------|-------|
| <i>Purchase decision</i> | 1:13 |
| <i>Accounting integrations</i> | 1:33 |
| <i>Type of work</i> | 2:12 |
| <i>Accounting integrations</i> | 3:29 |
| <i>Assets</i> | 5:33 |
| <i>Type of work</i> | 6:49 |
| <i>Accounting integrations</i> | 7:16 |
| <i>Accounting</i> | 10:23 |
| <i>Purchase decision</i> | 11:03 |
| <i>Implementation and ongoing support</i> | 12:16 |
| <i>Accounting</i> | 12:41 |
| <i>Implementation and ongoing support</i> | 13:32 |
| <i>Customer engagement</i> | 18:23 |
| <i>Access to information</i> | 19:58 |
| <i>Access to information</i> | 21:02 |
| <i>Recurring maintenance</i> | 22:30 |
| <i>Assets</i> | 23:37 |
| <i>Recurring maintenance</i> | 25:23 |
| <i>ST app contracts and pricing</i> | 25:48 |
| <i>Recurring maintenance</i> | 26:09 |
| <i>Quote templates</i> | 26:42 |
| <i>Tech time tracking</i> | 27:02 |
| <i>Access to information</i> | 27:18 |
| <i>Tech On-site</i> | 27:35 |
| <i>Tech time tracking</i> | 27:53 |
| <i>Quote templates</i> | 28:53 |
| <i>Quote templates</i> | 29:44 |
| <i>Recurring maintenance</i> | 30:06 |
| <i>Customer engagement</i> | 30:22 |
| <i>Deficiencies</i> | 30:36 |
| <i>Assets</i> | 30:56 |
| <i>Assets</i> | 31:27 |
| <i>Tech On-site</i> | 31:41 |
| <i>Forms</i> | 31:55 |
| <i>Assets</i> | 32:21 |
| <i>Forms</i> | 32:37 |
| <i>Recurring maintenance</i> | 32:54 |
| <i>Forms</i> | 33:06 |
| <i>Tech On-site</i> | 33:48 |

| | |
|----------------------------------------------------------|---------|
| <i>Deficiencies</i> | 34:10 |
| <i>Access to information</i> | 35:50 |
| <i>Parts management (purchase orders)</i> | 36:21 |
| <i>Access to information</i> | 36:59 |
| <i>Quote templates</i> | 37:33 |
| <i>Tech On-site</i> | 38:00 |
| <i>Forms</i> | 38:27 |
| <i>Tech On-site</i> | 38:45 |
| <i>Assets</i> | 39:04 |
| <i>Tech On-site</i> | 39:21 |
| <i>Customer engagement (quoting and invoicing)</i> | 39:43 |
| <i>Tech On-site</i> | 40:00 |
| <i>Deficiencies</i> | 41:33 |
| <i>Tech On-site</i> | 41:52 |
| <i>Tech On-site</i> | 42:53 |
| <i>ST app contracts and pricing</i> | 43:10 |
| <i>Tech On-site</i> | 43:43 |
| <i>Tech time tracking</i> | 44:10 |
| <i>ST app contracts and pricing</i> | 44:30 |
| <i>Deficiencies</i> | 45:40 |
| <i>Quote templates</i> | 47:05 |
| <i>Customer engagement (quoting and invoicing)</i> | 47:57 |
| <i>Quoting</i> | 50:05 |
| <i>Quote templates</i> | 51:24 |
| <i>ST app contracts and pricing</i> | 51:42 |
| <i>Customer engagement (quoting and invoicing)</i> | 52:38 |
| <i>Dispatch</i> | 52:56 |
| <i>Tech On-site</i> | 54:28 |
| <i>Quoting</i> | 54:45 |
| <i>Deficiencies</i> | 55:32 |
| <i>Quoting</i> | 56:29 |
| <i>Deficiencies</i> | 57:01 |
| <i>Customer engagement (quoting and invoicing)</i> | 57:46 |
| <i>ST app contracts and pricing</i> | 58:23 |
| <i>Parts management (purchase orders)</i> | 58:43 |
| <i>ST app contracts and pricing</i> | 59:34 |
| <i>Parts management (purchase orders)</i> | 59:56 |
| <i>Parts management (inventory)</i> | 1:00:40 |
| <i>Parts management (inventory)</i> | 1:01:32 |
| <i>Parts management (purchase orders)</i> | 1:01:45 |
| <i>Parts management (purchase orders)</i> | 1:02:55 |
| <i>Parts management (inventory)</i> | 1:03:38 |
| <i>Parts management (purchase orders)</i> | 1:03:54 |
| <i>Parts management (inventory)</i> | 1:05:14 |

| | |
|----------------------------------------------------------|---------|
| <i>Invoicing</i> | 1:05:53 |
| <i>Tech On-site</i> | 1:06:56 |
| <i>Customer engagement (quoting and invoicing)</i> | 1:07:13 |
| <i>Invoicing</i> | 1:07:33 |
| <i>Recurring maintenance</i> | 1:07:57 |
| <i>Dispatch</i> | 1:09:32 |
| <i>Type of work</i> | 1:10:54 |
| <i>Recurring maintenance</i> | 1:11:09 |
| <i>Dispatch</i> | 1:12:07 |
| <i>Recurring maintenance</i> | 1:14:12 |
| <i>ST app contracts and pricing</i> | 1:14:31 |
| <i>Customer engagement</i> | 1:16:37 |
| <i>Pricing</i> | 1:17:46 |
| <i>Customer engagement</i> | 1:18:01 |
| <i>ST app contracts and pricing</i> | 1:18:56 |
| <i>ST app contracts and pricing</i> | 1:20:48 |

Transcript

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BRETT

0:00 Hey, good morning, Dave. Can you hear us?

DAVE

0:01 Sorry about. Sorry, I'm a...

BRETT

0:04 You're you're good man. We appreciate you joining this morning. I know you're busy especially at the end of the year. I know you've met Chris. My name's Brett Griffith. I'm the inside territory manager here at service, straight for the northeast. You're in Pittsburgh, correct?

DAVE

0:16 Right. Okay. Cool.

CK

0:19 So, yeah. How are you doing there? We go?

DAVE

0:21 Hey, I'm good. How are you?

CK

0:23 I'm doing good traveling today, so I'll probably drop off here in a couple of minutes, but wanted to jump on and just say, hi.

DAVE

0:30 Yeah, no problem.

CK

0:32 You're in, you're in good hands with Brett. He's been here for a while so, he knows all the INS and outs to be able to take you through the whole dog and pony show.

BRETT

0:41 Yeah, we'll have some fun today, Dave. You're the general manager, right?

DAVE

0:46 Correct. Yep.

BRETT

0:47 Okay, cool. So, let me give you an idea of how we like to run these meetings. Let's start out. Let's have a conversation. First of all, can you pronounce your company name for me? I don't want.

DAVE

0:56 It's you know, what I'm still having a hard time with it as well. All mechanical?

BRETT

1:02 Got it.

DAVE

1:02 It's LMI...

BRETT

1:06 I can do that. Okay? So I wanna talk about is operations today, what it looks like, what you want them to look like in the future?

--- *Purchase decision* ---

BRETT

1:13 I'll give you a little background on service trade, then we're going to go into the demo, Chris kinda set the agenda from your first call. So that's what I'm planning to talk about today. If there are additional things that you want to bring up or you wanna talk about again, just let me know, interrupt me whatever it looks like there. But here's my understanding of you guys currently use Foundation and the Foundation service module?

--- *Accounting integrations* ---

DAVE

1:33 No, no. They use, they use Foundation... for Construction, right? And payroll, they don't have the service module of Foundation. So they're using a form builder for like work order completion and then a spreadsheet for managing their maintenance.

BRETT

2:00 Interesting. Okay. So, I'm just trying to put myself in your shoes if for managing maintenance on a spreadsheet. How often are you missing a PM?

--- *Type of work* ---

DAVE

2:12 So, they're extremely behind on maintenance, not really missing it, but, you know, so what I, what I've been saying is, so there's a very large Construction company, with a small service wing that primarily has been here to support Construction. And I have right now 10 service technicians and, they have a pretty good amount of maintenance contracts... but, you know, then they're doing a great job managing everything with what they have and they've never really seen true service software but, you know, I come from a heavy service driven company. So like they're managing their maintenance a week out because they don't even have a dispatch board, right? So it's not like they're necessarily missing it. They just get so far behind because it's reactionary scheduling as opposed.

--- Type of work ends ---

CK

3:10 So like proactive.

BRETT

3:12 Gotcha. Is the goal of you joining on with, to kinda grow the business and focus more on the plane?

DAVE

3:17 100 percent. Yeah.

BRETT

3:19 Okay. Are there specific like numbers growth goals you guys are looking for or is it just grow?

DAVE

3:26 Yeah, no, no, no numbers just grow.

--- Accounting integrations ---

BRETT

3:29 Okay. Gotcha. Would you mind talking a little bit about your previous experience in the market? I know you dealt with one of our competitors had a bad experience. Is that accurate?

DAVE

3:42 Yeah. We, so at my old company, we were on coins their like server based ti version and they were sunseting it.

--- Accounting integrations ends ---

DAVE

3:59 So we started the process. We knew we had to upgrade. So we were looking at service trade and we were looking at BuildOps. We ended up choosing build ups and we were gonna, we, it was going to be build ups with Sage intact and we were... rapidly approaching our implementation date and it wasn't it just wasn't gonna work how we initially had thought. So we ended up pulling.

BRETT

4:29 Gotcha. Okay. Is, was that, it just didn't work for your company specifically at the time or was that the product, what I'm getting at is, are you gonna explore BuildOps at LM?

DAVE

4:42 I am going to explore BuildOps. I, so I would say, the biggest issue that I had at the time was now again being I'm strictly service driven, I live and breathe maintenance contracts. And, we had a tremendous system in coins of how we manage our maintenance contracts. And at the time BuildOps didn't have that. So, you know, their, they're scheduling and work order creation and billing, and all that was great. And I, and I saw that from ServiceTrade as well. And I like that what it's gonna come down to me 100 percent of the meeting, the potatoes is maintenance contracts.

BRETT

5:23 And it's the managing of them and making sure to deliver to the customer and not the physical selling of them, correct?

DAVE

5:29 Correct.

BRETT

5:30 Okay. We can do that.

--- Assets ---

BRETT

5:33 Okay. And then it also sounds like along with PM contracts, you know, deficiencies quotes are important. You're pull through work, of course.

CK

5:42 What?

BRETT

5:43 Else is important to you? What else is top of?

DAVE

5:50 I would say... just trying to create the most streamlined efficient process possible from the time we get a service call to how quickly we can Bill it, what information is in there, keeping history, whether it's a, you know, for a technician to be able to access customer history, being able to access equipment information, modifying equipment information, being able to... keep track of open quotes that are under a certain customers file, things like.

--- Assets ends ---

BRETT

6:23 Okay. Gotcha. Okay. We can hit all these today. How much of your work is project management or project? Excuse me?

DAVE

6:37 So, you know, I'm kinda based, you know, I've been here a month and I haven't really... all I've spent my time doing is like reinventing policies, procedures, spreadsheets, things like that.

--- Type of work ---

DAVE

6:49 So I really haven't touched their business. But if I go back to my past life, it was 25 percent of the business was our projects, our special projects and managing them.

BRETT

7:02 Okay. Got. So.

DAVE

7:04 Yeah, next year.

BRETT

7:07 Gotcha. So, yeah, the reason I asked that as I know that's on our agenda to cover for today, I was just really looking for, you know, what specifically are you looking for on the project side?

--- Accounting integrations ---

BRETT

7:16 It sounds like you don't necessarily know. So I'll give you an overview and it might be a talk with your team on that.

DAVE

7:22 Yeah. I mean, you know, so let's go back to the way I operated router of was project management came down to spreadsheets, you know, it was pulling, it was pulling reports from coins. And then, I had a running spreadsheet that I would take

that data and put it in manually and manage it that way. Now, I will say I really liked the project management tool and BuildOps that the time when I was playing with it. But, it was one of those things like, hey, that's cool. But I have a good system as it was just not as efficient.

BRETT

7:58 Gotcha. Okay. Yep, we'll cover that and I'm right now and everything you're saying. So keep it coming. If anything else is on your mind. The other thing I have written down is, so Foundation, what are your thoughts on? Do you want to keep the system separate? Do you want to integrate? Where are you coming in?

DAVE

8:20 So, I mean, my preference would be to almost have a completely separate set of books, but I know it's very important to the owner that it integrates with Foundation. So only has one set of books. Yeah. I think ideally, the thought here is to use service software for, you know, to run the business and then that hopefully would just integrate whether it's GL codes, whatever in the Foundation.

BRETT

8:52 Yeah. So we realistically we can do either option. I kinda lie with you on how I feel it's best as far as keeping standalone systems. You do get more control in that manner that's what we can integrate with Foundation. It is a it's not a it's not like a API integration because Foundation is so old. It's it's an import export functionality. What I like to tell people, which is probably something I'll tell your owner at some point, you know, if you guys are running 400 invoices a week. Yeah, integration makes sense right off the bat. But if you're doing only 40 jobs a week or less, I don't know that it makes sense cost wise from the integration standpoint.

--- Accounting integrations ends ---

BRETT

9:31 So know that we can do it now that we can talk about it. But I did want to say that.

DAVE

9:36 Yeah. Well, so just to talk on that point you just made. So I don't know maybe right now today, they're doing 40 jobs a week, but what I really focused on is putting something into place today that can sustain 400, right?

BRETT

9:53 Exactly. Yeah. So that's the conversation we need to have. Is it something that we put in place from the start? Or is it something that maybe as you guys grow, maybe you double in size, you're at 20 technician that's a great point to bring it in? We'll talk about.

DAVE

10:05 So the thing is that like that's probably going to happen within six months.

BRETT

10:09 Okay. We like fast growth. Okay. Yeah, we can talk about Foundation a little bit. I don't plan on covering that. Today. We have a specific person on our team that's really good at the accounting side of things that will require another meeting, probably be 20 minutes.

--- Accounting ---

DAVE

10:23 Well, so is it, would, it, is it like the fsi importer tool that would we just essentially be taking data out of service rate and importing it through the tool in the Foundation?

BRETT

10:37 Yeah. So it's not the fsi importer tool. We actually wrote a custom, what we call stack service trade accounting connector, but it is an import expert. So export invoices out of service trade and then import them into Foundation. And there are specific things that map over which I can send you a mapping document for. But that's what we'll cover in that Foundation meeting if we get there.

DAVE

10:56 Okay. I... so I'll say this to me.

--- Purchase decision ---

DAVE

11:03 It's like the service contracts or the meat potatoes for me, but the integration is way more important to the owner and.

BRETT

11:12 Controller and that's who's making this decision, right? Fortunately.

DAVE

11:17 They're they're sort of Dan, the owner, sort of putting it in my hands, but I don't want to recommend anything that is gonna make someone else's life miserable, you know?

BRETT

11:28 Yeah, yeah. I understand. Okay. And that kind of brings up another point. So you mentioned Dan the owner there? Who else do we have to get other people involved? Or is this just you and I are going to go through this process?

DAVE

11:46 Ultimately, if we were to go further down the road, then I would be pulling in Dan, and.

BRETT

11:53 Okay. Cool. And then my last question before we get started here is are you guys looking to make a move this year?

DAVE

12:02 Yes. Yeah. So... before I go and bring on any customers or any technicians, I need something in place. So this is the one thing that's really kinda right now restricting me from?

--- Implementation and ongoing support ---

BRETT

12:16 Got it. So good news for you. I can get you started. If everything goes well, you like service trade, you wanna move forward, I can get you started as soon as January fifteenth on onboarding company. Your size is probably gonna take about 90 days.

DAVE

12:32 What... what is the onboarding process training, right?

--- Accounting ---

BRETT

12:41 So, it's gonna start out with data?

DAVE

12:43 There would, there would be no data migration.

CK

12:46 Really?

BRETT

12:48 Okay. Nothing in Foundation? No, no customers. Anything like that. Yeah. I mean.

DAVE

12:54 Yeah, they have customers in Foundation, but we're not talking a huge list. I think the way that I'm envisioning this is, I think someone could very easily as someone here in, I can very easily manually enter customers, into the software at the data migration to be any sort.

CK

13:15 Roadblock here.

BRETT

13:16 Yeah. So I mean, I'll tell you off the bat. We got 1,300 customers. Our onboarding team. This is all they do, typically not a roadblock. Basically, we just need you guys to send us your data, which would be an export out of Foundation, which should be pretty easy if you guys can get that information into a spreadsheet.

--- Implementation and ongoing support ---

BRETT

13:32 My team can import it for you to reduce any of the manual entry that you guys are welcome to type it in yourself. But as far as onboarding, the front half is typically data, the middle half is, you know, bringing in admin staff learning, and then the later half is bringing in technicians, learning training, certifications, et cetera.

--- Implementation and ongoing support ends ---

DAVE

13:50 Right. Okay.

BRETT

13:51 Integration is going to be at the end there as well. If we go that direction. Okay? And I'll paint that picture a little bit better for you. If you do like what you see with service trade as we go through the process. But really at the end of the day, Dave, this is your meeting. This is your time. I'm just here to be a resource. So interrupt me and do whatever you gotta do to get the answers you need. Sure... and being that you've seen service trade before, I'm not gonna do the whole overview.

DAVE

14:20 Would it be okay because, I just ran out of a meat. Can I go grab a coffee real quick? We just say like two minute pause. Yeah, go ahead. Sorry. Give me two minutes.

BRETT

14:28 Absolutely.

BRETT

15:51 Okay. Just to get a call.

DAVE

16:51 I'm back. Sorry about that.

BRETT

16:53 No, you're good man. I understand the need for coffee in the morning. Totally fine. Just so, you know, Chris had to jump off, but you got me for the rest of the day. No problem. I have blocked off until I blocked off until 10. Is that a good time for you?

DAVE

17:12 Yeah, yeah, I would say probably a hard stop at 10, so.

BRETT

17:18 Yeah. I blocked off an hour and a half. So we had plenty of time. We'll we'll definitely be done by then, I think.

DAVE

17:22 Okay.

BRETT

17:23 So let's get into it. So for LM, I, or actually let me say this like Chris mentioned before, I've been at ServiceTrade for about four and a half years. Now. I've talked to hundreds if not thousands of commercial mechanical contractors. The biggest thing that has come up specifically this year in the past as well. But it's a labor shortage. Companies are telling me time and time again that they have more work than they can handle. You've only been there for a month. But are you guys, do you know if you guys are experiencing the labor shortage?

DAVE

17:49 Yeah, they do well. Yeah, they probably are a little bit under stuff right now.

BRETT

17:55 Okay. Gotcha. So at that point, I mean that's what we're used to hearing. So it's how can service trade help you guys get more work done with the staff that you currently have in place? So we're gonna focus on two specific things and they are controlling costs, focus on your technicians, and then growing quality revenue, focused on your customers, arguably your two two biggest assets as a business. I now we break that down a step further. Yeah, we want to help you guys improve your service and your project operations to help focus on the plan maintenance that you were talking about to continue to grow the business.

--- Customer engagement ---

BRETT

18:23 We also wanna set your technicians up for success. They're arguably your most expensive most valuable resources. So we wanna give them all the information they need to get in, get out, do high quality work and move on... from there. Service trade does enable you to sell more agreements. We're not gonna focus specifically on that today, but we are gonna focus on the managing of service agreements, making sure that you guys aren't behind anything like that, aren't missing jobs. But at the end of the day, service trade has always will always be about telling a story to the customer, making you guys stand out from your competition. So we do help you grow your profitable, customer loyalty by telling that story to the customer through things like, you know, your one click quotes, your post service reports, your one click invoices, whatever it might be. But day of what's on your screen right now, which one of these is most important to you or multiple?

DAVE

19:09 Today... improve service and projects operations?

BRETT

19:16 Okay. That's what I figured gotcha. And that's what really today's demo about the cool thing is when you do one of these in service trade, you're going to do all of them. And then as far as service trade as a company, we only work with commercial mechanical and fire protection contractors. We're not working with the pest control company and the landscape or anything like that. It's strictly. So this is what we know we have been in this market for about 11 years now. So we do have experience. We have about 1,300 customers that are actively using today. I, those customers though they serviced over 10 percent of the commercial industrial building last year, that accounted for 13,000,000 customer assets under management with over seven point 5,000,000,000 dollars invoiced through service trade last year, Dave? Do you have any questions for me prior to getting started?

--- Access to information ---

BRETT

19:58 No. All right. Let's get in. So first thing service trade is 100 percent cloud based. All you need to access, it is internet access and a browser. All your text need in the field. Some kind of mobile device, iOS and android is good. The only thing we don't work with is like the Microsoft service tablets.

--- Access to information ends ---

BRETT

20:15 This is the first thing that you guys are gonna see when you log in the service trade, it's your service dashboard is really giving you all visibility into your day. So you got your daily schedule, you know, what jobs, what technicians are going to, at what locations, this is going to get built out as you build out the schedule for the day. But this page is also gonna give you what I like to call these buckets more visibility. So if you guys do have overdue jobs that appointments, like you said, you guys are behind on PMS today, those jobs would fall into this bucket notifying you guys every single day that you need to schedule these because the due dates coming up... inevitably, every job is going to be due at some point. Hey, so we're going to let you know, jobs without appointments during the next two weeks. It makes more sense to schedule now versus waiting till they're overdue and potentially having our customer get mad.

DAVE

20:57 Is, is this dashboard customizable per user.

--- Access to information ---

BRETT

21:02 In what way?

DAVE

21:03 So, like if I log in to service trade, this is my start screen, right?

BRETT

21:12 So, yeah, this is everyone's start screen that said you can set permissions based on who needs to see what?

DAVE

21:19 Okay. I guess what I'm saying is like for me, I probably don't want to be logging looking at like overview PMS or anything. I'd probably want to be seeing more financials.

--- Access to information ends ---

BRETT

21:29 Yeah. So as a company, that is something that we're building out, it's essentially individual dashboards. I do not have that to show you today. And I'm not gonna promise you that it's going to be live at a certain date. We don't do that. It is something that we're working on. I don't have it for you today. As far as the customizable dashboards. So realistically, when you log into service rate, this is the first thing you see today.

BRETT

21:53 We will get into a little bit more of the dashboards. You're just gonna have to click to get there. Also on this page though, for your staff might be past jobs, market fleet, this is just work orders coming back to the office, letting them know that hey, they have to review, make sure the parts labor items are correct. From there, it falls down to your completed jobs to be invoiced. And this is the stuff we either need to build out a service trade or push to Foundation.

BRETT

22:19 So, that page, excuse me high level overview like you said, not necessarily for you. So I wanna get into specifically kind of our data model data hierarchy.

--- Recurring maintenance ---

BRETT

22:30 So because we are built for commercial contractors, how we work as a ship to and a built two, I imagine that's how my customers are too. So in this case, excel or corp is my Bill to under excel or corp. I might manage one location, I might manage 100 locations. They're going to be listed out below today. We're working specifically at comcast center, Dave. I put you as my primary contact. We're going to track every contact at this location. So when it is time to send that quote on that invoice is here for me. Now let's get into the physical, what we provide on the PM contract for the customer. So that's services. So services is anything I'm actually delivering? Yes,

there might be deficiencies from, or repairs from deficiencies your text found in the field. But as I scroll down, I am getting more into my recurring work. For example, what I have highlighted, this is going to be your guys scope of work inside of service trade. We're gonna take these services and, I put them on the recurring basis that you guys go out. So whether it's quarterly, monthly, semi, annual, etcetera, you'll set that up in service trade. So service trade reminds you to go do this service. We take that a step further though we also tie the services to the individual assets or pieces of customer equipment to provide you guys with a really Rich service history that you're asking about earlier.

--- Assets ---

BRETT

23:37 Both your office, your technicians and your customers are going to get access to that service history. Any questions here? You said now?

DAVE

23:48 Yeah. Sorry about that.

BRETT

23:51 So that's services you're just gonna have, if you have a PM for a customer, maybe you manage 15 pieces of equipment, each piece of equipment might have a different scope of work. You're just gonna put it in here to track and we'll get to the scheduling side of that momentarily. I do wanna touch a little bit more on assets though. Asset tracking is something service trade does extremely well. We've been doing it for 11 years. A lot of people don't track assets for the manner that we do just because they don't have a way to do it today. But it does provide that really Rich service history. So, if we look at for example, rooftop unit to right here, I can click into that from the office and I can see, you know, what is every service we provide for this piece of equipment? What are all the work orders that we've done? I can see any deficiencies, any quotes provided for that piece of equipment as well. And all that's going to be here is that kind of the level of service history that you're looking for Dave?

DAVE

24:38 Right. Just while you're in this, the... this, would a technician have the ability to modify like let's just say the... if we entered in like under a customer site like this rooftop unit to, could the technician then go in and add the model number, serial number and things like that?

BRETT

25:09 If you want them to absolutely, and I'll show you that from the mobile app.

DAVE

25:14 Okay.

BRETT

25:20 And as you can see, you're going to track every piece of equipment at this location.

--- Recurring maintenance ---

BRETT

25:23 If you don't track equipment at a location, we can default to the building and you can tie the service to the physical building. The other thing on this page is contracts. So yes, we're gonna manage your physical contract within service trade. And what that means is we're going to manage the markup rules, the prices, all that stuff, the expiration date service trade itself as I'm sure Chris talked to you about is not going to be in charge of physically selling the agreement.

--- ST app contracts and pricing ---

BRETT

25:48 Sounds like you have a process for that today, which is fine. But whatever you get signed by your customers, what you're putting into service trade, that's what all of these are right here. Each of these has different markups that's how we get our markup roles on our quotes, our invoices, etcetera, and then if there are specific rules like I have to apply a trip charge for this specific customer that can be applied to the contract which is applied to the customer.

--- Recurring maintenance ---

BRETT

26:09 Does that make sense? Okay? So, this is the location page. Like I said, it's really your record of truth for any given customer specifically comcast center. In this instance, right now, what I'm gonna do is I'm gonna take you through a workflow. So I set up a preventative maintenance job for us today. We're working at comcast center, excels or corps getting the Bill, Dave. You're my contact. It has this Texas children's hospital contract. So keep that in mind. But what I set up for today are these two different services. I set up two. So I could show you that you can put two different services with two different pieces of equipment on one work order.

--- Quote templates ---

BRETT

26:42 You can all streamline your technicians, doing it all in one day. I also applied two technicians, Chris and myself to show you that multiple technicians can go into work order... scrolling down. I should probably point out with these services. I added, I applied templates. So in those templates, I know the parts that I'm gonna use when I perform these services.

--- Tech time tracking ---

BRETT

27:02 So these automatically applied when I schedule the job, you guys can do that as well. You guys can also build out the part list as you see fit. We are gonna track technician time. So we can do that via either labor items like H, back labor right here, or clock events.

--- Access to information ---

BRETT

27:18 We got to decide what's best for LM. I... you can see the assets that we're gonna work on today. You'll see there's no deficiencies, and there's no attachments yet. That's gonna change once I go out to the field too. So here's our mobile application. I'm on an iPad right now here's.

--- Tech On-site ---

BRETT

27:35 That comcast enter preventative maintenance job at eight 30. So I just filter it by today just to see today's. Jobs keeps a little cleaner for your tech. He can turn that off. You can see everything you scheduled too. So clicking into the work order, as far as tracking the technician time, you have this bar across the bottom is your technicians, clock fence.

--- Tech time tracking ---

BRETT

27:53 So he can do on site, he can do end route and he can do job rep. In this instance, we're just gonna clock in on site. This is gonna track my hours in the background. Are you guys a union shop?

DAVE

28:03 Yeah.

BRETT

28:06 Do you have any regulations against clock events? Yeah. Okay. And then I guess last question, would you say clock events are preferred to typing in two hours labor?

DAVE

28:21 So... I personally don't really like the clock events. But... so what I'm used to is like at the service agreement level, you know, we, I would be putting the number of hours estimated per inspection, so that maintenance inspection generates it's. Already got time allotted. Yeah, it doesn't have to.

--- Quote templates ---

BRETT

28:53 Yes. So that's what I was kinda saying with those templates over here. Like when I added the service, it said, hey for rooftop unit one, we're using two hours of labor. It automatically applied that's your contract.

DAVE

29:05 Yeah.

BRETT

29:07 So you're more than welcome to do that and actually thinking about it if you guys do integrate with Foundation down the road, cock events don't transfer over but labor items do, which is this?

--- Quote templates ends ---

DAVE

29:16 Yeah.

BRETT

29:18 Okay. Let's just jump into that from the field as well. That can either already be on there from the PM or if it is, you know, reactive service call, I jump into job items and I would just come in and add a part. Each technician can have their own labor rate here.

--- Tech time tracking ---

BRETT

29:32 So I think I have like an Eli Manning labor rate. This is me. So I just tie this to myself. I say how many hours you can set it up so your technician can't see what they get paid or they can up to you. In this case, I have it turned off.

--- Quote templates ---

BRETT

29:44 So I just add in that I use three hours of labor and you guys will fix it in the back office. Does that make sense? Yeah. Okay. So that's really the job items thing that's gonna be consistent with any material that you guys use, add it from your guys list is gonna have your guys pricing in there, just really build out the work to, for your office to understand what you're billing for.

--- Recurring maintenance ---

BRETT

30:06 But as far as what your technicians performing on site today, he's clicking up into services. Tells him that same exact verbs that you just saw from the office, the two services he's providing on the two pieces of equipment, you guys, you just talked

about estimated duration, you do have the ability to put that on as well as estimated price.

--- Customer engagement ---

BRETT

30:22 And if you don't want your tech to see this, that can be turned off as well. Okay. Under attachments, a lot of our customers like to take before and after pictures. They're they're really big proponents of engaging with the customer, show them the work that you guys did.

--- Deficiencies ---

BRETT

30:36 So maybe I take a picture of this bag here and take a bunch of other pictures on site... because we're based on the cloud. You guys have an unlimited storage here. You can take as many pictures, videos, audio recordings as you want, right? You will have technicians will have all the contacts if they do need to contact someone on site.

--- Assets ---

BRETT

30:56 They have it here for them. But under assets, you were asking me the question, can technicians modify assets from the field? Yes. So click into that here's. The two pieces of equipment I'm working on for example, rooftop unit one here's all the information I know about it, but maybe the zero number is wrong.

--- Assets ends ---

BRETT

31:12 So all I gotta do is hit this edit button at the top and I can go in and change anything as I need to. Is that kind of what you're looking for? Yes. Okay. To take that a step further. Your technicians, they need to know a lot of information on site.

--- Assets ---

BRETT

31:27 We wanna give them all the history of that. Location. They may not have been the last one. They go there especially as you guys grow. So we do have the service history tab. This is essentially showing you every single work order you guys have done at contact center on this piece of equipment, roots up unit one over its entire lifetime.

--- Tech On-site ---

BRETT

31:41 But, yeah, I can click back to November sixteenth, see what I did or I can go back to two years ago and see what I did when I click into that work order. What your technician is gonna see is the services provided on that date and time, you can see who the technician was.

--- Forms ---

BRETT

31:55 Looks like it was me, any pictures that we took. So it looks like I took a picture of the ground and I filled out a PM checklist which begs the question. Are your technicians filling out PM checklist?

DAVE

32:05 They are, yeah, through their... they use go canvas. Yeah. So that's like where they actually fill out their work orders. And then there are generic checklists that they use.

--- Assets ---

BRETT

32:21 Okay. We'll we'll put those checklists in service. I'll show you that in a second. So jumping out of service history. Let's talk about that. My technicians doing a PM, he needs to, you know, take readings et cetera. Put things down. Technician is gonna come down here, hit view more details.

--- Forms ---

BRETT

32:37 Does exactly that shows me a little bit more information. And from here and everyone's going to get trained on how to do this. So from here, technicians coming up to actions, download blank paperwork, how this is gonna work, Dave, is we're gonna take your guys forms that you wanna use of our 1,300 customers.

--- Recurring maintenance ---

BRETT

32:54 We don't keep track of these forms. There's a lot of stuff to keep track of. So we let our customers provide us with what they wanna use. We set up dispatch roles if it's a hvac job, you get your H, a form for duration job, duration, form kind of etcetera from there.

--- Forms ---

BRETT

33:06 So in this instance, I'm just gonna fill out one form. We're gonna generate this paperwork. What we do is, we generate this through Adobe acrobat. Adobe is a free app. It just enables you to smart fill these on site. And what I mean by smart fill is all

the information from your ServiceTrade account is automatically gonna flow into Adobe. Your technician doesn't have to sit there and type it all in. The information I'm talking about is, you know, the technician on, the job number, this specific asset as you can see right up here. Essentially, it just saves your technician time in the field. That said this is the billable document, whether it is checking off the boxes like you see here or it is free form information like you see here. This is what it's gonna look like you think your technicians can adopt that?

--- Tech On-site ---

DAVE

33:48 Yeah.

BRETT

33:49 Okay. We try to keep it pretty simple from there. All I gotta do is add this back to my service trade job. So I'm gonna hit send a copy. And then the cool thing is when I hit add the service trade knows that I'm working on this contact center job right now. So it says you wanna add it there. All we gotta do is hit upload meeting?

--- Deficiencies ---

BRETT

34:10 Any questions so far? Dave?

DAVE

34:12 No.

BRETT

34:13 Okay. So you mentioned pull-through is important to you, as the technician is going through that PM, he's filling out this form, he realizes he has a efficiency. The best way to manage that is to come into deficiencies right here and say, hey, I have a broken compressor. I don't have to be crazy descriptive on that because I am gonna come behind it and add more detail. What I mean by that is I'm gonna take the pictures, tell the story of the problem that we found on site here's. My broken compressor. Yeah, pictures are great. Audio recordings are even better if I can take an audio recording of me, the technician talking into it. So I don't have to type it out or if I can take an audio recording of the equipment making a weird noise, I can notify you in the office, what's going on site. So, hey, Dave here, working on rooftop unit one. Got a broken compressor. I need XYZ parts to fix it. Probably you need a helper. Gonna take me three hours... save that in from here. Your technicians gonna mark the severity. Is this totally inoperable? Is it deficient or is it suggested we'll call it deficient today? And then the asset that we're working on again, this is gonna tie back to that service history. So we wanna tie deficiencies to assets. And our last step is what's the status. Is this a brand new deficiency? Did I fix it on site? All verified means as I send a quote to my customer and they're aware of it, but we have not fixed it yet. So I'll mark this as new, so we can go through that process from the office. Any questions on logging a deficiency?

DAVE

35:40 No, but, and maybe you're gonna show me this, but like because I'm assuming now it's gonna flag the office. Hey, there's an efficiency. We need to quote something.

--- Access to information ---

BRETT

35:50 Exactly, right?

DAVE

35:51 Can have the ability to quote it... if.

BRETT

35:55 If you want them to, it's not ideal through ServiceTrade. I'll tell you that, but they can, if you want them to. Okay. Well, how often does that happen for you guys?

DAVE

36:10 Would prefer to have something in place that the technician could at least that they would have the ability through the mobile app to generate a quote or at least start one.

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

DAVE

36:21 And that's, what I used to do is they would... they have the ability through a form builder that they could start a proposal, at least put in model number zero numbers, parts and things like that. And then it would flag the office to at least finalize and send it.

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

BRETT

36:39 Yes... I would say... as long as that's the exception, not the rule. Yeah, we can do it. But, if you're leaning on your technicians to generate all the proposals, it's gonna get a little clunky.

DAVE

36:52 Just not at all, just giving them the ability, and maybe certain technicians, maybe, you know?

--- Access to information ---

BRETT

36:59 Lead technicians, guys like that. Yeah, we can do that from the mobile app. I'll show you real quick before we get back.

DAVE

37:08 Guys love to do it because they can quote it while they're on the roof, and have their customer approver right down there.

BRETT

37:16 Exactly. So like I said, yes, this is possible.

--- Access to information ends ---

BRETT

37:20 I just clicked a couple of buttons here. Excuse me, I can go and add a quote right here. It's gonna be from their bubble device. So it's it looks better on the computer is what I'm getting at, but I can totally come in and say, hey, I'm at... comcast, we're doing this repair job.

--- Quote templates ---

BRETT

37:37 And then here's the contract associated with the customer. So I save it in and then I can go build my quote out. I can add, you know, assets in, I can add in what the physical quotes for what the service is. And then any items, parts we might use to do this repair? I can send this to the customer on site as a technician. Okay?

--- Tech On-site ---

BRETT

38:00 Is there anything else from the field, Dave that we have not covered yet that was really important to you signature? Is anything like that?

DAVE

38:06 Well, so, cause so he, in your example used a PDF, to do like a checklist, and under like the work description test, is that where he's actually completing work performed or I can not be, is that done directly in service, right?

--- Forms ---

BRETT

38:27 So, I would say that's done directly through service trade, any, you know, comments they need to send back to the office would just be written here under comments because this is your technicians physical work order. The checklist that I filled out via Adobe is really great for, you know, if you guys are like the form I filled out was a leak test form.

--- Tech On-site ---

BRETT

38:45 So it's like additional readings that you need to get from the job that you might send to the customer after the job is complete.

DAVE

38:52 Okay. What comments is, where he's gonna, you know, let's just say this were a service call, you know, arrive on site, found that the union was broke recommend whatever.

--- *Assets* ---

BRETT

39:04 Exactly. And you can leave those comments here in a couple of ways. You can leave them specific to this job. You can leave them on this location. So every time someone comes to comcast that comments here or specific to this service, every time we come out and do this specific, PM, you need to see this comment as a technician.

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

DAVE

39:21 Okay. All right.

BRETT

39:26 Our technicians getting their work signed...

DAVE

39:27 Off on... yes.

BRETT

39:32 So that's how we'll end the mobile app here and then go back to the office. We call that a work acknowledgement and service rate. So I'm gonna click that button essentially pulls up who the technicians were and what we did on site as the technician.

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

BRETT

39:43 I'm gonna go through these right things, correct? Dave. I'm gonna select you as my contact. You do see this generate invoice button again? Permission setting. Now, a lot of customers use it especially in the commercial world, but if you did have specific customers that needed the invoice on site. It is possible if you don't need it, we will turn it off. You won't even see those buttons?

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

DAVE

40:00 I would want that turned off in the furthest dimension possible.

BRETT

40:05 I imagined, I don't know why we did that, but we did, yeah, we will, it's a back end setting. We'll hit the toggle switch. Those will be gone. So what your technicians are gonna do is the technicians gonna turn their device around to the contact on site, Dave. You're gonna come through, you're going to review everything, make sure I did everything I said, I did customer is gonna agree to LM I PS and CS. They're going to acknowledge it down here. I'm gonna say, yup, your information's correct? Dave. You're gonna sign it and you're gonna get a copy right now?

BRETT

40:39 So from there, from the technicians are actually any questions on the signature? Okay. Yeah, pretty cut and dry.

DAVE

40:48 Can you... turn that on and off per customer? Like some, you know, let's just say customers don't require a signature with the technicians still have to go through that process.

BRETT

41:02 No, the technician is not forced to go through that process. Actually. Let me show you something. So when I go to clock out of a job here, I'm gonna say what I did, what I finished. But when I continue clocking out, you have this list right here. You can set this up on a customer by customer basis.

--- Tech On-site ends ---

BRETT

41:18 As far as you need to do these specific things for this specific customer before you leave their location. So, for the ones that require signature, what I put it on here, ones that don't put it on here. Makes sense.

DAVE

41:30 Yeah, that's perfect. That's what I was hoping you would say.

--- Deficiencies ---

BRETT

41:33 Good. This is brand new and I love it. So, in this instance, I didn't leave a comment... found efficiency. Let's just leave it at that. I found efficiency as your technician is going to be a little more descriptive than me. So I'll finish clocking. Now, when I go back to my home screen on my mobile device, and I click on filter by today, that job is gone.

--- Tech On-site ---

BRETT

41:52 It is over in my completed section in case I need to go back, but it's currently in the office. So.

DAVE

41:59 Can the technician go back and like reopen it?

BRETT

42:04 He can, and it's gonna notify you in the office. Hey, Brett went back to this comcast center job on Friday and reopened it.

--- Tech On-site ends ---

DAVE

42:11 Okay. Just one.

BRETT

42:13 Kind of paper trail audit history. Say that again?

DAVE

42:18 That be turned on and off that we wouldn't give them the ability to reopen it.

BRETT

42:24 That cannot be turned on.

DAVE

42:25 Okay.

BRETT

42:27 He can only see or they can't see anyone else's work orders, but if they did need to change anything, they could, but you guys get notified every time.

DAVE

42:35 Got it.

BRETT

42:38 The reason for that is, yes, you guys have service calls that take a day, but you guys might also have projects that take a week, a month, three month, et cetera. You need to be able to go back into those jobs.

DAVE

42:48 Got it.

BRETT

42:50 So, Dave, we're back on our work order from the office.

--- Tech On-site ---

BRETT

42:53 The one we just did in the field. The PM job status currently says in Progress. However down under appointments, it says completed, that is because my technician, me, I just did everything I'm supposed to do on site. So if you remember from the dashboard, the past jobs are complete, this is the status that, the job is currently in.

--- ST app contracts and pricing ---

BRETT

43:10 So your office is getting this, reviewing it internally. Excuse me. I'm coming down to my part of my labor items here's. That labor that I added from the field. You can see it's not tied to a service I might want to tie it to for more job costing reasons. Also from the office, I might wanna make sure that all my prices are correct. So I know that labor is not zero dollars, aren't zero dollars and filters aren't zero dollars. So I adjust these as I see fit... and it'll fit and say, hey, your standard cost is X, in this case, it was zero mapped up... that.

--- Tech On-site ---

DAVE

43:43 We just for a minute. Yeah. So... right now, like this is this let's just say the dispatcher in the office reviewing this, right? And with the final step, like what we're getting to right now is billing it?

BRETT

44:02 Yeah. So I'm going through reviewing the work order from the office and I'm gonna close it out, invoice the job and send a post service.

--- Tech time tracking ---

DAVE

44:10 Report. But what you were just doing though was actually putting prices to parts and labor.

BRETT

44:16 Got, yeah. Okay. I'm following not, so for example, the Eli Manning labor is something that your technician added in the field. In that instance, I couldn't see pricing as a technician. So it comes back to the, office knows what the technicians get paid.

BRETT

44:30 Office knows what the cost of parts are, technicians don't necessarily know that. So in the office is where you're fixing everything up, making sure the invoice looks correct prior to sending to the customer price wise?

DAVE

44:42 Okay. But is there going to be a step before it's invoice, where we could be adjusting mark ups per like when I see a belt further down the line, you quantity for 10 dollars or whatever? Will someone have the ability to say? I wanna mark that up 40 percent?

BRETT

45:03 Yeah, I'm tracking now. So, the page we're on right now is the job, the physical work order on the job, we're just tracking costs. Once we turn this into an invoice, we're going to apply your contract and your mark up rules at that point. Yes, you can manually change markups as you see fit.

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

DAVE

45:18 I just wanna make sure we weren't like brushing over that. That's all.

BRETT

45:21 No, you're good, a great question. No, great question. Absolutely. So I will get there in probably two minutes. I want to prior to invoicing this job. I wanna show you the deficiency process of it because you did mention pull-through works really important.

--- Deficiencies ---

BRETT

45:40 So the broken compressor did come back on this job as a deficiency. This is not the only way that you guys are going to get notified. You will get an e-mail notification. It'll look like this. I'll say, hey, Dave. Rich just found a broken compressor on rooftop. You don't want here's. A link that takes you right into service trade, tells you more about it. So.

DAVE

45:59 Just for a quick clarification at this point, the customer has already received a copy of their work.

BRETT

46:06 If you want them to via the signature, yes, it's a toggle switch.

46:10 Okay.

BRETT

46:15 On our deficiency, here's what your technician just found a couple of minutes ago, here's any related deficiencies. So if I've found as many bad compressors on this rooftop unit as I have in the past three years, we know there's a problem. We need to look deeper into it. Something cool that service trade is working on right now is introducing AI. So we, like I said, we've been in the market for 11 years. We've been listening to machines for 11 years. So we almost know what a broken compressor sounds like, what a bad quote sounds like, etcetera. So we're using that to that data, excuse me and the AI technology to provide our customers with recommendations on piece of equipment before you even know what the recommendation is. So that's one of the cool things we are working on right now that's that will be live in January. Yeah... under attachments, you've got the audio recording from your technician. You've got the picture from your technician, meaning the person who's doing the quote. It's almost most like their on site.

--- Quote templates ---

BRETT

47:05 They have a lot of information. So from here, you guys can add this straight to a job. If you don't need a quote it or you can add it to a quote. So I will throw an expiration in. We'll say halfway through December and we'll create a quote.

BRETT

47:23 And so here's your quote right now, pretty blank. You know, you're here to fix the broken compressor, Dave. You're more than welcome to come in and type a description if you want or if you'd like saving time like I do, you can apply a template. These are going to be your guys templates but it's just a general description of work and the type of parts we use for this type of repair, every customer will be a little different. You might have to build this out a little bit more adjustable, same thing with your parts, your labor item right off the bat. I see my margin is way off. This is another instance where we'll talk about the markups. So in this instance, why is my margin so low?

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

BRETT

47:57 Because my contract's wrong? This is not the contact center contract. Let me go ahead and change that. Now. I can see my margin is correct. All my markups are where I want them to be before sending this quote to the customer. You guys get to pick the level of detail that you want to share with them. This can be a default setting as well. But maybe you wanna show full line on, right? Maybe you want to tax that customer as well... add all this in and we are going to send this out to the customer. Do you, Dave have access to your e-mail today? Yeah. Awesome. If you can pull up the quote, I just sent you either gonna say service rate, send you a quote or Brett sent you a quote. And just to show, you guys can pick and choose, you know, what goes on

that quote. If you're technician, Brett cursed a bunch, don't include the other recording. It's not customer friendly, but the picture does tell a story.

BRETT

48:51 And at the bottom of the e-mail you get from me, it's gonna say view and respond that's the button you want.

DAVE

49:03 Now... you toggled like what you wanted to show them in the quote, right? But, but we could do it where it was just a lump sum, no breakout, right?

BRETT

49:17 Absolutely. I said, I wasn't sure what you guys did, but if you just wanted to do grand total, only you can do that under detail.

DAVE

49:25 Yeah, I like this.

BRETT

49:28 You think your customers are like that's what we're worried about? Cool. If you can go ahead, Dave, if you can approve the quote in the top right corner, I'll show you how it kinda reflects back in the office.

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

BRETT

49:49 Right. Thank you, sir. So a couple of cool things there. Let me know when you're looking back at my screen.

DAVE

49:57 Yeah.

BRETT

49:58 Okay. So the reason I knew that you approved that we have a quote history. So you can see your technician in the field, adding that recording that picture.

--- *Quoting* ---

BRETT

50:05 You can see who sent it out. But Dave, this is your IP address right here. You are the one that physically viewed and approved the quote this co. So it's really great, Cy purposes customer tells you, hey, Dave, you come in here and say I sent it two weeks ago. You've looked at it six times. You haven't approved it. Maybe we need to work this out. Go ahead.

DAVE

50:26 So, just curious when this would there be the ability? Obviously, it's gonna flag you in service trade. But if a customer pros a quote like that, can it shoot you an e-mail as well? Like nation?

BRETT

50:40 Yeah, that's exactly how it's gonna work. I don't know if I have a like quote accepted.

DAVE

50:44 Perfect. All right.

BRETT

50:49 From there, once it does get approved, obviously quote status change to approved right here in which you guys can turn, the approved quote into either a new job or if you're going out to comcast enter on Friday, you can add it to an existing job to reduce the amount of truck roles. Still. Okay?

--- Quoting ends ---

DAVE

51:05 Okay.

BRETT

51:11 Let's see, I wanna make sure I'm hitting everything I still have to go over scheduling and dispatch invoicing and project management. So from here, what I'm actually gonna do is I'm gonna show you a little bit of projects. And then at the end we'll invoice. Is that okay with you?

--- Quote templates ---

BRETT

51:24 So I'm gonna create a job from a quote, let's say instead of a broken compressor replacement, this turned into, a full unit replacement. And I'm not gonna go through and adjust everything but the po that you used on the quote copies over right here. You guys would throw a due date in say the end of December.

--- ST app contracts and pricing ---

BRETT

51:42 We wanna copy everything from the quote. So everything comes over to the work order. But instead of making this a job, a work order, we're gonna make this a project. Projects have a little bit more functionality in service trade. So this is unscheduled, which we'll get to moment early in the way that projects are different though, you have this performance tab up here. And it's basically gonna show you how far you are on your budget for the specific project, where's your budget coming

from, that approved quote. So, so here's your budget based on the approved quote. Once everything is finally approved, you guys are gonna come in and lock this out. It'll give you a history who logged it, who did what you'll set it up. So certain people within your organization cannot unlock this budget because you want to track how you're doing. So that will probably be you Dave from here as change orders do come up on your projects, you can add them in the change order is gonna look the same way as the quote did.

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

BRETT

52:38 So if I say, hey, we need this widget say we need 10 of these things. And my price is let's just call it. Turbo. When I send this out to the customer for approval... I'll send you a copy, don't worry about approving it. It's gonna look the same exact way that the quote did.

--- Dispatch ---

BRETT

52:56 As far as the approval. Does that make sense? Okay. You guys are also welcome to approve that from the office. Maybe you're on the phone with the customer. So that's really the budget change order side of it. Let me go back to... here. As you guys are working on this job, you're scheduling appointments, you might do an appointment today on the 20 ninth. You might go out on the 30 first. You might go out for two weeks in December. We're going to be able to generate a whip report for you guys, you're going to be able to track the budget. But the important thing with the appointments, you can schedule multiple appointments on different days on one work. Does that make sense? Okay? Any other questions around that? I know projects aren't necessarily your baby, but they're important.

DAVE

53:45 No, no, they are. It's super important. Super. Yeah, I like it is there.

BRETT

53:53 Can you scroll?

DAVE

53:54 The top real quick. Yeah. So I'm assuming if you hit the jobs tab, you're gonna see the whole list of every job and you can filter by open invoice, everything quoted?

BRETT

54:08 Exactly. So you got all these parameters here. Like some common reports I'll see is show me all the jobs that are incomplete, show me everything unscheduled or I can do like show me all the jobs that Brett has incomplete. And so you can drill down to specific technicians. You can drill down to specific date range.

--- Tech On-site ---

BRETT

54:28 You can drill down to specific customer locations. It's it's really up to you what you wanna find here. And it's not just jobs. You can also find job items which is your parts and your labor clock events, which doesn't really matter for you. And the appointment is when you physically went out and did the work... to take that a step further.

--- Quoting ---

BRETT

54:47 This type of reporting is also available for quotes and invoices and efficiencies. So I pulled up quotes over here. A common quote report I might see is show me all the quotes... submitted and viewed but not actually approved by a customer. Maybe once a week, you guys are coming in and running this report and you realize that there's 80 results in here that's a lot of money left on the table.

--- Quoting ends ---

BRETT

55:08 Very easy for you guys to resend these back out to, the primary contact that you initially send it to. So just a way to catch that low hanging fruit on the invoice side... you can export things like invoice details. You can get your gross margins on jobs, your actual versus estimated all that good stuff.

--- Deficiencies ---

DAVE

55:32 Let me ask this technician finds an efficiency. And then someone in the office would open it up and like let's say start a quote, but then they have to go out and give pricing from a vendor and it might take a day or two. Can you like save it as a draft? And then there's a whole like there's a... yeah, let's by.

--- Deficiencies ends ---

CK

55:59 Let me see here.

BRETT

56:02 Actually, let me try something... on time. I got 30 minutes left. I don't know the answer to that question. So let's find out.

--- Quoting ---

BRETT

56:29 No, I think, I know the answer now. So the quote is gonna stay in the new status until it's physically sent to the customer, which it will say the submitted status. The

best way to manage, the workflow that you're talking about right now would be to assign sales people to your quote. So people are physically assigned to quotes and they'll just have a queue of quotes that they need to manage that can be recorded on. These people. Don't physically need to be salespeople, but it's just a way to tie them to what they're working on. Does that make sense?

--- *Deficiencies* ---

DAVE

57:01 Yeah, yeah. So... well, I guess what I'm getting at is, so a technician writes up a deficiency is the dispatcher, then let's say, just hit new quote assigned to a salesperson, save it and get out of there so that the salesperson knows I got.

BRETT

57:20 Exactly right. We'll probably set it up also so that salesperson gets the e-mail the deficiency e-mail...

DAVE

57:25 Beautiful. Okay. Well.

BRETT

57:31 So, I'm gonna take you back to... the original work order that we were working on, went through the deficiency went through a couple of things, but now we're back on the work order, we're gonna turn it into an invoice. So deficiency is good as far as attachments here's.

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

BRETT

57:46 The billable paperwork, I filled out picture, I took here's where I got my work signed off on. So let me ask this before I move on here. Do you prefer to send the invoice with the post service report? Or do you prefer to send a full post service report and then send the invoice?

DAVE

58:04 I like to make sure that the customer has a copy of the service report, like as soon as the work was done, that then, you know, generally we were invoicing two three days post visit and then we would more than likely attach a copy of the service report with the invoice?

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

BRETT

58:23 Beautiful. Okay. So let me show you how this works. We are gonna, once everything's correct, we're going to complete the job. We're gonna say, yup, complete it and create the invoice. It's gonna pull up this page right here. This is for LM I, to

review, make sure that the pricing contract is correct, change it to a standard, make sure your guys unit costs are correct.

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

BRETT

58:43 No zeros. You can check the flag and see what your standard costs are. Again, the zero in my account, but I'm gonna create this in.

DAVE

58:50 I ask a question.

BRETT

58:51 Go ahead.

DAVE

58:55 Are we generating purchase orders through service trade?

BRETT

59:00 You have the ability to, how do you guys do that now?

DAVE

59:03 Well, right now, today, they're doing purchase orders and Foundation... I guess what I'm getting at is like where you have a belt that let's say a technician went out on a service call and they say, hey, we need a new condenser fan. Ideally to me, they would get a purchase order from the office, and if that were entered into service trade, then we know, you know, someone calls gets, gives a vendor a purchase order number.

--- ST app contracts and pricing ---

DAVE

59:34 The vendor says, okay, it's 500 dollars, and then that's tied into that job. So then ideally, when we're invoicing, we know our cost or committed cost is 500 and then we can put a mark up to it.

BRETT

59:49 Yeah. The, the question there just begged. I mean, does the process for POS work in Foundation today?

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

DAVE

59:56 It, it can, but they're for service, they're not generating a purchase order. So they've already received a vendor invoice, which, you know, I'm trying to get it to... they would be getting a purchase order, setting a counter somewhere so that the job knows that there is going to be committed costs that's gonna hit.

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

BRETT

1:00:20 I got you. I got two ways to manage it. It really comes down to what your budget is for software, which we haven't really talked about yet. So, service trade and 10 solution for mechanical contractors. We have every piece of the puzzle. Not every company requires every piece of the puzzle that's what I'm trying to figure out with you guys. So let me show you a couple of things.

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

DAVE

1:00:40 Well, and maybe I'm not understanding like let's just say for that be B 41, it has a unit cost of 10 dollars assigned to it, right? Where does that, where does that 10 dollars come from? Is it like an inventory?

BRETT

1:00:53 So, yeah, that, that's one of the solutions that we provide. We provide a full po and inventory management solution. Are you guys physically tracking truck and warehouse stock?

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

DAVE

1:01:03 Yes. Okay.

BRETT

1:01:06 That opens up the door there. So you're tracking that in Foundation today, right?

DAVE

1:01:16 Yes, they are in famish, yes.

BRETT

1:01:18 Okay. I'm gonna show you a couple of things here. So let me, I'll show you the short way first and then the long way second. So with this VB, where does this cost come from?

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

BRETT

1:01:32 You guys are going to import all your costs into service trade from your vendors. When you onboard, a lot of what our customers will do is we'll reach out to their vendors and say, give me every part I've bought from you guys in the past year. I need to implement it into my software with the cost.

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

BRETT

1:01:45 Now, I understand costs are gonna change, changing, costs are difficult to manage because it's they almost change daily for you guys with our inventory solution. As vendor invoices, come back to the office. It is gonna at the cost on the physical work order that's, the other product. The other instance that you could do that is for this belt technician, while they're on site could select parts vendor, they can select which vendor they're ordering from. And sometimes customers will use like the last four digits of the job number as the po. I don't know that this is for you though... they'll come in, they'll say this, excuse me... they will select the status and say, hey, this part has been received. I am on site at the vendor and I got it today... that's the easy way to do it right there.

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

BRETT

1:02:38 I think I'm under the impression that you require our partsledger solution?

DAVE

1:02:44 Yeah, I would think so.

BRETT

1:02:46 Let me show you that real quick. Let's go here. Open this job back up that we just worked on technicians in the field.

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

BRETT

1:02:55 He is the one physically going to the vendor. Is he the one generating that you want to generate the po?

DAVE

1:03:01 The technician? Yeah, ideally. I mean, I think it kinda goes like the quoting, I think certain technicians, I would like to have the ability to actually generate a purchase order. But I would say the standard process would be there's. A dedicated person in the office who generates all purchase orders... okay?

BRETT

1:03:22 One second. Okay. So for those lead technicians, and what I'm getting is we have another person that shows partsledger. I don't really know the office side, but I do know the technician side from the technician side.

--- Parts management (inventory) ---

BRETT

1:03:38 For those specific lead technicians. If I wanted to open up partsledger right here, it would bring me to this other screen and this is where your technician in the field, the lead technicians could do stock up a stock lookups on inventory. They can generate POS and they can transfer stock between trucks or warehouses... with this generate new po button or section.

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

BRETT

1:03:57 Excuse me, when I hit this little eye button, it actually pulls over the job that I'm clocked into in service trade. So I don't have to split back and forth anything like that. This is where technicians can order only from a list of suppliers that you guys put into the system. So if home depot is not on this list, I can't go to home depot to get parts. But for act me when I hit create po. Let me put in what I need see. I need this refrigerant... five, I'm a po, and maybe I also need this bell 93 of these things. I add these. Then what you need to know is with service rate and partsledger, you can order for inventory, you can order for a sales order, meaning a job. It's all configurable. We're gonna need to talk about that from the field. If I finally is this po, it is gonna generate a physical po number for your technician to provide to the vendor 757 right there. And e-mail is going to get notified to the office that your technician generated a po... and they're just gonna hit done when I go back to service trade here... right? At the top, that refrigerant and that belt that I ordered. You can see it came from acme supplies with po, 757.

--- Parts management (inventory) ---

BRETT

1:05:14 Sounds like that's more of what you're looking for. Okay. So we just need to talk about partsledger more in detail. I will get the creator of partsledger on the phone with you. I'm thinking that we could potentially get the creator of partsledger and, the Foundation lady on the phone at the same time to reduce the amount of means that we have.

DAVE

1:05:32 So partsledger is like a third party.

BRETT

1:05:36 Now service trade owns partsledger. It's just a total inventory system that we built on a ledger because inventory is really complicated to keep track of.

DAVE

1:05:43 Okay.

BRETT

1:05:48 Okay. For today's, meeting, we got about 15 minutes left. I know you got to run it at 10.

--- Invoicing ---

BRETT

1:05:53 So let's get through physically doing the invoice here. Once I make sure all my prices are correct, we're going to send the invoice link. Now, you guys have the option here. You can send the invoice, be a service rate if you want. That's what I'm doing right now. If we integrate with Foundation, you're going to have another button here that says send to your accounting system. And you're just gonna push the invoice into Foundation to build like you guys do today. Do you know, does your team prefer to invoice at a Foundation or is that just the financial tracking?

--- Invoicing ends ---

DAVE

1:06:24 Well, right now, is there any option?

BRETT

1:06:27 That's true. Okay. So moving forward, if service or a direction that you guys go, this could be an option. So at the top, it's gonna say, LM, I, you guys are going to break this out however you want. For your, customer understands that they owe you 2,800 bucks for these services that you guys did. If they have any questions, what they're paying you 2,800 bucks for? We have this service details at the top. This is that post service report that I was talking about earlier in the meeting. LM, I over here saying Brett and Chris came out on this date.

--- Tech On-site ---

BRETT

1:06:56 Here's. What they did on site here's, what they used on site and you guys can pick and choose what you want to include. Here. Customer can see all the attachments. So here's the paperwork, I filled out the signature I got in the pictures I took on site as well as any deficiencies that we found.

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

BRETT

1:07:13 This is in the verified status because you approve the quote, but I haven't fixed it yet. But is this level of post service report something that your customers would be receptive to?

DAVE

1:07:24 Yes.

BRETT

1:07:28 And like you're saying this is right on the invoice, I don't have to look at it but it's there for that.

--- Invoicing ---

BRETT

1:07:33 Take that one step further. Customers can pay you guys via service trade via credit card or a CH? I will send you the transaction fees for this, but it's just an easier way to take payment customers that are utilizing this versus their accounting system typically decreasing days outstanding by about 15 to 20 days.

--- Recurring maintenance ---

DAVE

1:07:57 So, this, so correct me because I know you're like showing me a demo. In this case, it's preventative maintenance, right? Is there a way to take prevent or maintenance and do it on like a recurring schedule is like, because the way we did this is we did the PM and then we invoice them for the PM, but I like to generate actual PM invoices in a.

BRETT

1:08:25 Yeah. So we have the concept of recurring invoice.

DAVE

1:08:29 Just...

BRETT

1:08:32 Just wanna make sure it's here.

BRETT

1:08:38 Yeah, recurring invoices right there at location because I don't have any examples, but you guys can set this up, you know, apply your service contract. We'll just pick this one. We'll say it's a... and then how often you want to build a customer? So maybe you say monthly repeat every three months to Bill on a quarterly basis. And then service trade is going to create the invoice and send it to the customer on a quarterly basis. Okay? So let's see. The only thing we haven't been through yet is scheduling and dispatching.

--- Recurring maintenance ends ---

BRETT

1:09:09 We got 15 minutes left is now a good time to talk about that. Okay? So a couple of ways to do it. Let me some of these, keep things cleaner.

DAVE

1:09:19 Yeah. You're giving me anxiety with all your tabs.

BRETT

1:09:21 Yeah, I have story, my life, man. Okay... this and get this.

--- Dispatch ---

BRETT

1:09:32 So the first thing I'll show you the dispatch board, it's really for your reactive service that is coming in typically in the middle of the summer when you guys are taking calls, left and right, this is where you're gonna be. So I like to describe it. All your technicians are going to be over here on this left hand side. Each technician is going to have a swim Lane horizontally across the screen. Here's the two comcast and our jobs. We worked on the PM job and the project. Now you guys are always going to have available jobs to get done. You can filter this out by multitude of different filters here to get what you want to get. But this is work that we need to schedule. Sometimes you're going to have work that's higher priority than others that's what this queue is here for. So you can essentially drag jobs from the available jobs into the queue is telling you this is work that we need to get done today. So from the queue, all I need to do is drag and drop down to my technician. Excuse me to make them busy. So I'm dragging comcast center to this technician core pro, to Alex. As soon as I drag and drop that to my technician, my tech get notified both via e-mail and via their mobile application that they're going out to this job at this time.

DAVE

1:10:36 The colors mean anything?

BRETT

1:10:38 Colors are different job types. Okay? And I'll get you a list of what they mean or what the color applies to... a couple of other things. This can be done on a daily view, a weekly view, or even a monthly view. This can hook up to outlook or Google calendars.

--- Type of work ---

BRETT

1:10:54 It's up to you guys how you wanna view this... so that's really the reactive side. But I know majority of your business is a, so I wanna focus on this as well. This is called service opportunities. It's a report that you guys run to make sure you don't miss out on any work.

--- Recurring maintenance ---

BRETT

1:11:09 So maybe I'm looking at next month and I am looking at offices or just different divisions within your company. So show me my heating division and to me, my recurring services. All my PMS... do this demo account. So what this is doing right now is it's paying all your different locations inside of service trade, looking for

jobs that are due within the parameters that we selected. You have all these jobs to do three months out. I'm not gonna that for the demo, but I'm gonna select four or five of these things to show you what this looks like. For example, Arthur stadium, there are three icons. I scroll down to the stadium. Yeah, there's three icons, but we're doing multiple services on three different assets. They all fall within the same time frame in February. So we're gonna put them on one ticket for you guys. Unless you turn that off right here by selecting the whole idea is just to reduce the amount of truck roles to location. So what we're gonna do with this is we're gonna pick a job type.

--- Dispatch ---

BRETT

1:12:07 We know that these are all PMS and we're going to create these five jobs. Everything disappears from the screen but where it does go, is onto this map based scheduler. I, I'll filter this out... and service trades based in Durham, North Carolina. So we'll stay right here in Raleigh. Those five jobs that I just added from the service opportunities report. They fell onto this map as pins specifically, gray pins are telling us that jobs are both unassigned and on schedule. Different colors are going to be associated with different technicians. But let's see what all this means. This job in downtown Raleigh. I wanna take Chris kid, well, since you know, drag them and drop them onto there. It turns that nice blue color. Chris is now assigned to this job. Now, I need to physically schedule it if I'm gonna send Chris to this job in downtown Raleigh on Friday. The first I drag and drop it to Friday. The first, it gains that calendar within the pin, you guys know, when the appointment is. Now, in this instance, you can also apply multiple technicians to this. If I want to also add Adam, you can see it turns this square next to the person you have. The two, we got two technicians next to the calendar to one. I got one appointment. I can make this a multi appointment job as well. Now, next to the calendar, it says two. Does that make sense? Okay? So, Dave, I'm looking at our agenda, PM contract overview, and management, work order management, time and labor tracking, schedule, dispatch, deficiencies on PM contracts, quoting and light project management. I believe we covered all that today. Is there anything that I missed?

--- Dispatch ends ---

DAVE

1:13:39 Could we use the next nine minutes to talk more about like a service contract yeah?

BRETT

1:13:51 What specifically about them?

DAVE

1:13:56 So this is definitely what I wanted to see. So I'm assuming what we're looking at is every active service contract that we have, right? Correct? I don't know. Can you... edit one or view it so I can see like what all is in there?

--- Recurring maintenance ---

BRETT

1:14:12 Yeah, absolutely. So this is the standard contract. The one I use for comcast center. Let's just go through one by one. So here's all your details. You can do parent and child contracts if you want specifically for customers... start date, end dates. You can report on that to know when you need to renew a contract... and description.

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

BRETT

1:14:32 So that's pretty cut and dry. But as far as like item prices. So what you can do is you can do individual cost mark ups at a percentage basis, you know, parts zero to 50 dollars, we mark up 100 percent, 50 dollars and one cent to 100 dollars we mark up 25 percent, et cetera. You can do it that way or you can do individual item price or broken out like this H back compressor is gonna get marked up 100 percent of what we buy it for. So it's really just setting, the pricing structures that your customer is gonna receive from you guys. We also have contract rules. This is what I was talking about a little bit with the markups but you can put minimum charges, then you can put trip charges in. Every time I go to comcast center. We apply 150 dollar trip charge. Maybe there's an instance of, to get up onto this building. You guys have to deal with security. I was just in New York City yesterday, and they have to apply with the company I was with, had to apply 200 dollars to every job because they have to deal with security for two hours just to get on the roof. If that's something you guys deal with, put it in the contract.

DAVE

1:15:31 Yeah.

DAVE

1:15:36 Sorry, can you get back to the contract rules?

BRETT

1:15:41 On crack rule, yes, sir.

DAVE

1:15:42 And, okay, cost mark up. That's what I wanted to see.

DAVE

1:15:49 Beautiful.

BRETT

1:15:50 And, on the level that you would buy service trade at, you're gonna get unlimited support from my team on setting these up.

DAVE

1:15:57 Okay.

BRETT

1:15:59 As many as you want?

DAVE

1:16:01 At, at each individual contract level, but is there also a way, let's say you have a customer that you don't have a contract with, you still put in a markup table like that?

BRETT

1:16:11 You can put it on a mark up table. My recommendation would be for example, like I have a standard contract. So for each customer, you're going to have like comcast center contract, authors contract. But then for those customers that aren't under contract, I'd recommend having like a standard and a premium contract, a way to explain to your customers why they should do a maintenance contract with you guys, they can get this pricing and... that's on the level that you guys are purchasing.

--- Customer engagement ---

BRETT

1:16:41 Let me ask you, do you guys have a running website or working website? Yes. Okay. I was having trouble getting there this morning. I didn't see it. We can also throw a customer portal on your guys website in which property managers as customers can come in, see the full service history on it.

--- Customer engagement ends ---

BRETT

1:16:57 What I'm getting at is it's just another way to kinda show customers the work you're doing, but also sell them, prevent a maintenance agreement. Because hey, we're gonna show you all this information. We're going to show you the pictures of your equipment. We're gonna show you everything that went wrong.

DAVE

1:17:10 I'm assuming that the portal is not like a standard like that's, an extra thing, right?

BRETT

1:17:17 Do you happen to know what your...

DAVE

1:17:20 LMILM, I a, an per... P as in Paul? Sorry?

BRETT

1:17:29 Got it.

BRETT

1:17:35 That's why I was on the wrong website. This is what I need to figure out, see if it's gonna be more money or not. Is it Wordpress or not?

--- Pricing ---

BRETT

1:17:46 Okay. It's not Wordpress. So how this is gonna work? Our portal only works on a Wordpress website. My team can set this up for you guys. It would be a 3,000 dollar setup fee and a 799 dollar hosting fee. That said this is a nice website.

--- Customer engagement ---

BRETT

1:18:01 I imagine you guys have a website provider or a hosting provider. I've had customers reach out to, their website providers and, they will put the portal on your website essentially just putting the Wordpress plugin on your website for like 300 bucks. It's more affordable to reach out to your vendor to do it than us or software people, not website people.

--- Customer engagement ends ---

BRETT

1:18:23 Does it make sense? I'll get you documentation on that as well... but we have five minutes left. What else is important to you? Dave?

DAVE

1:18:37 If we could very quickly go back to this service agreements. I just wanted to see... what other buttons we have there?

BRETT

1:18:54 Here's your detail for the customer.

--- ST app contracts and pricing ---

BRETT

1:18:56 How is, so, you can set up default as far as like, you wanna show line items, you wanna show grand total that's going to be set here. You guys can have multiple sets of terms and conditions depending on the type of work that you guys are performing. As I mentioned, child contracts can be applied to the parent. This is a parent that we're looking at... any comments on this contract. So all added something about a year ago, then any attachments, it would be the physical contract in service rate. So anyone can see it at any given time.

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

DAVE

1:19:39 Okay.

BRETT

1:19:41 If there's somewhere else you want me to go, just let me know.

DAVE

1:19:43 Yeah, they see everything.

DAVE

1:19:51 No, I think we're good for now.

BRETT

1:19:54 Okay. I can have Adam our solutions architect that's gonna show you partsledger touch a little more on contracts as well. It's really what he focuses on at ServiceTrade. So he might have some more intel on that. But here's what let's start here. Did you like what you saw with ServiceTrade today?

DAVE

1:20:12 I did.

BRETT

1:20:13 So enough to continue talking?

DAVE

1:20:15 Yeah. I would say... I definitely think next step would be to talk further about the integration to Foundation. I would like to see creating a contract from scratch. Maybe. Okay. And then.

--- ST app contracts and pricing ---

BRETT

1:20:48 I think we're gonna need to go over partsledger.

DAVE

1:20:51 That's not as critical. I would like to see reporting.

DAVE

1:21:03 Each individual's contract profitability. You know, like if there's a report that you can look at... profitability per job... in a month, something like that?

BRETT

1:21:24 Yeah, Adam's going to be our guy for this? I just did all this stuff yesterday, so... we can definitely cover this. Do you care about profitability per job? Do you care about technician A is more profitable than technician B?

DAVE

1:21:42 Not really. I mean that's obviously a cool tool.

BRETT

1:21:51 But that's not upfront.

DAVE

1:21:52 No, I like being able... you know, ideally to me, I wanna be able to look at every service agreement with its profitability, you know, and seeing, okay, is it not profitable because we're going over on our estimated hours or, you know, is it just need increase things like.

BRETT

1:22:18 Okay. This is helpful.

BRETT

1:22:24 Okay.

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

BRETT

1:22:27 It's definitely the end of the year. It's definitely a busy time of the year. Are you a busy guy in December?

DAVE

1:22:37 I suspect I'm going to be, yeah.

BRETT

1:22:40 Yeah, yeah. I'm definitely busy too. So let's try to get something scheduled. Now, did you have access to your calendar? So you wanna talk about Foundation first? I think what we should do Dave is we should have a 20 minute call to talk about Foundation, get you the information you need. We should have another call to talk about creating contract from scratch. Excuse me. And then all the reporting. Is that all right with you? Sure got. I just got to get different people on the phone. But for the Foundation meeting here's, what we have available, anything that's not blocked is what we can do.

DAVE

1:23:22 As it stands right now, Wednesday or sorry... Wednesday would be my best bet if you can do like two.

BRETT

1:23:32 Two o'clock works for me six two PM. Would you also like to go ahead and schedule out the... call to talk about contracts and reporting now?

DAVE

1:23:45 No. Let's do. Let's focus first on the Foundation.

BRETT

1:23:48 Got it. Okay. So, I know you gotta run right now. I'm gonna send you an e-mail with a recap. I'm gonna send you a shared workspace that's going to house all the information we talked about today. Just keep it in one spot. Give me about an hour and a half to put all that together. I'll send you the recording as well. But Dave, I will also send you an invite for next Wednesday to talk about Foundation connector and we will go from there.

DAVE

1:24:08 Okay. Sounds good. I appreciate it.

BRETT

1:24:10 Yeah, you as well. Have a great day.

The End