



# ServiceTrade/ M3 Mechanical Demo

Clint Mathis with M3 Mechanical  
Recorded on 3/3/22 via Zoom, 1 hour 17 min.

## Participants

### **SERVICETRADE**

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# Transcript

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

CLINT

0:00 Hello? Can you?

LAUREN

0:00 Hear me? Yeah, I can.

CLINT

0:03 Hi, just wanna make sure it didn't go through that, have availability for summary.

LAUREN

0:08 Are you at their office?

CLINT

0:10 No, I'm... I'm here because I'm gonna go, I'm at my house.

LAUREN

0:15 Hello. I thought you were going in there?

CLINT

0:21 Because we were talking about doing it and then ended up being last minute, changing it to nine.

CLINT

0:32 Hello. I'm gonna hit the road as soon as I'm done with this one... stick to my original plan on the other calls.

LAUREN

0:48 No... hello?

CLINT

0:52 How's your trip? Good?

LAUREN

0:54 Good. Yeah, I'm just had lunch with 10 and Megan and shape and Brian outcome. So that was good. Last night. I had dinner with 1,000,000,000 Brian and one of our board members on that yesterday... hung out with and Megan on Tuesday after our meetings. So it's good. But we're gonna, we're going to head to the airport... some point... too long.

CLINT

1:26 True.

LAUREN

1:26 I have a lot of stuff on the calendar today.

CLINT

1:30 Do you really?

LAUREN

1:31 Yeah. I think after this, I've got like an hour to catch up on stuff... but... but, yeah.

TONY

1:47 Good morning.

CLINT

1:49 Hey, Tony. How's it going?

TONY

1:51 Good. Except my camera appears to be broken. Maybe it took that. No way.

CLINT

1:59 How can I say, man? It's real... it's real dark where your...

TONY

2:05 If he wants, but, yeah.

LAUREN

2:08 You can see us? Okay?

TONY

2:10 Yes, I can see you guys. Great. I think my camera has been dropped on its head when so many times.

CLINT

2:20 No worries. Well, I got well.

LAUREN

2:26 There you go.

TONY

2:29 Yeah.

CLINT

2:30 Good. Nothing gonna.

TONY

2:31 Ask Chris will go away. And then my right? Is Francine and Jose there, Rick just came in. So, got the whole crew.

CLINT

2:46 Nice.

TONY

2:51 Really?

TONY

2:58 This is Zoom.

TONY

3:07 To... figure out a way. Okay. So we are all excited to hear all about what you guys got going on.

CLINT

3:23 Perfect. Well, for everybody in the room. My name is Clint, my office, I'm the newer sales rep here for... for California. So I was fortunate enough to get to talk to Tony for a little bit yesterday and try to catch up on really the issues that you guys are... are having, what you're looking for in a software and do I have on the call with me? Is my boss, Lauren who's the director of the whole west coast. So, she's been with service trade for about six years. I believe it is now. So Lauren want to introduce you in case you want to say anything to the group? Yeah.

LAUREN

3:59 Hello? Hi, everyone. It's nice to meet you. I'm... I'm actually in our corporate office this week in North Carolina, but I actually live in orange county. So I am your neighbors... and I'm... I'm... I'm thankful that Clint had the opportunity to meet you all yesterday, and we're also thankful for the opportunity to kind of get to know you all a little better today and... and kind of share with you sort of service trade.

--- Purchase decision ---

LAUREN

4:25 And... and I'm kinda find out if... if what we have is a fit for your needs, switch from cleanse conversations. It sounds like it is. But... but we'll let you guys be the judge. So I'd love to hear who all we have in the room.

--- *Purchase decision ends* ---

LAUREN

4:40 I caught some of the names I got to Tony, obviously, Francine, but I'd love a quick... quick round of intros from you all. And then we can kinda... kinda get down to me, you know, what's interesting for you and... and kind of go from there. How does that sound?

TONY

4:57 That's great. Okay. I tried to reposition the camera without shut it down.

LAUREN

5:03 I think he did great.

TONY

5:06 Yourself. Good printing. Hi, I'm printing and you are what... the brands is in charge of all our operation. So are... we all will be deeply involved in... in the ERP, but her team is very easily and all aspects from estimated invoicing.

LAUREN

5:30 Gotcha. Okay.

TONY

5:31 And recall our seo... because they also appear in engineering. And Kathy, who will be coming in and out. She's drop your stuff here. So, I'm guessing she's coming back, but she is in charge of HR, it kind of runs a bunch of our business too. So... it's around a little bit more.

LAUREN

6:15 Wonderful.

TONY

6:17 Alright, there we go.

LAUREN

6:20 It looks good. So, Clint, I guess you've got sort of a plan for today. Do you want to kind of outline that for us? And then we can get into it.

CLINT

6:31 Exactly. So what I'm going to go through personal gonna give us a little background. I know Tony, we talked a little bit, but for the group just show a couple of slides just to give a little bit of background on service trade as the customers we work with. And then after that, we're going to jump into the software itself. There's gonna be a few different views that I want to show you guys.

--- Tech On-site ---

CLINT

6:53 The first one is going to be from the back office standpoint, show you what it looks like with the customer, show you a job. Then we're going to move over to what the technician would see out in the field, say when that job is dispatched out to them, how they can go through, you know, creating efficiencies or that pull through work.

--- Quoting ---

CLINT

7:12 Like I spoke to, you... you know, other repairs that are not on the scope of work, and then walk you through how a quote can be generated from that and how that quote would go out. And then we would see a customer view what that customer would see on that quote, how they can approve that.

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

CLINT

7:29 I'll show you the history of... of that approval process on that quote. And then, you know, you could either turn that into another job or... or the existing job. And then from there, we'll finish out that job completed and then go into invoicing and show you that customer facing view on the invoice side and how they can pay that. Does that sound fair enough?

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

TONY

7:52 It does.

CLINT

7:54 Perfect. Well, let me share my screen here... share with their... and can you guys see my screen? It's loading up there?

TONY

8:09 Yes.

CLINT

8:10 Okay, perfect. So as I spoke to you yesterday, Tony, he was just a few of the people customers of ours that you guys might recognize locally. I know with AOL



read reset, you know, white mechanical, western analyze. These are probably things that you guys are familiar with. So these are... these are companies that have trusted service trade to help their business growth to partner up with us. So we're excited to have them on board but also wanting to give you an idea to where, you know, as we go through this process. You know, we would love to get these out as references so you guys can talk since you're in the same industry and can learn from each other. If that's needed. What we really do here at service trade. And what we're trying to accomplish is make you more valuable to your customers. We know the commercial business which we only work in isn't in the commercial space is a lot different than residential. So we wanna make your customer sticky. We want to make sure that you're more valuable than the... the competitor down the street. And... and how we do that through our software is really be as broken down. And like I have to what I liked the same three different, you know, kind of segments and how do we help you grow? One is we want you to, you know, operate more effectively and efficiently. I know you guys are on the forefront more than a lot of other commercial how vendors like yourself because you guys are already using a certain software to be more efficient.

--- Customer engagement ---

CLINT

9:38 But we want you to get the most out of all those resources. Whether that's you know, your technicians be enable to... to work more, get more work quarters done for the technicians to being able to... to charge more for those work orders. Next we want to, you know, keep the customers and then track more. We all know that it's... it's a lot more cost effective to be able to... to keep the customers and continue to do more work for them to get more. But if we can go and create that brand and, you know, make your... your product and your company more viable, then you're gonna attract more customers as well. And then lastly, what I mentioned to you earlier, what we call deficiencies that... that pull through where... where your technician goes out there. And then maybe see some other problems we've seen and we've actually done a lot of studies that the... the most effective companies have done this process really... really well and been able to be... be able to be more effective efficient and create more revenue through this pull through work. Any questions so far before we go into the software itself?

TONY

10:45 You know, I'll just make one quick comment and that is your value proposition about the customer sticky notes and stuff that doesn't speak to our listening as much.

--- Customer engagement ends ---

TONY

10:57 Okay? We're okay with our customers and we got way more than we can handle. But what we really want is a kick gas super efficient... meeting technology or on the leading edge of technology operating system, an ERP, the... best and take care of itself. We do all that customers call. And so, and... and it really, it's not up. Yup. The history of our company is we don't you know, we haven't had any kind of advertising, no, we just got a website this past year. We don't do any outbound calls until recently, we got a sales guy who was just basically answering calls. So we're we've got more business we can handle. We want to show a really good to the people that we

have. We've got a lot of ways to do that and... and manipulate. But that part of the value proposition doesn't speak our listening as much just to kind of give you a heads up. I had started where to focus today.

--- *Customer engagement* ---

CLINT

12:06 Yeah.

LAUREN

12:08 Contacts, it's... it's interesting because most people who come to us are... are looking to streamline operations and they see that... that customer experience in that revenue growth, those sort of a nice side of the... the operation side of things. So, so we'll keep that in mind as we go through today's.

--- *Customer engagement ends* ---

LAUREN

12:29 Presentation. I would like to know since you brought up you're looking for like the leading edge software, can you... can you help me understand what that means to you and maybe what... what you imagine that looks like?

TONY

12:44 Yeah. So we, I just had a conversation with one of our management Kathy here.

--- *Accounting integrations* ---

TONY

12:53 And... and I feel bad my discussions with Clint yesterday, I was talking to him about the shortcomings of our current software and I don't really think that that's that should be the basis of our... our comparison because what we had before was really good. It just wasn't cloud base and wasn't searchable database wasn't easily searchable. And the reporting was not was call me otherwise, it was really, very good. Well thought out deep system that you could do a lot with. And really that's what we should be comparing what we're looking for now not rather than what we're using now is from company. This is a startup company venture backs. They, they're... they're going through a lot of growing pains and stuff. And so a lot of things that we took for granted before then spec really shouldn't be pointing discussion here. We should be comparing to feel one that was a well developed software. It just wasn't cloud base and reporting and searchability was... was lacking.

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

TONY

14:04 But that... that was really it. So we're looking for a woman to from estimating to invoicing... type of system where we can then slice and dice data in... in... in any way

we see it or desire. In particular. We're very, you know, kind of point of emphasis for us right now is on cost reporting, real time cost reporting.

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

TONY

14:33 So that would involve, you know, obviously the... the time cards ensure that keep providing real time data on cost basis of the purchase orders are as we enter them into the system that's providing real time data on our cost structure where we're at in a given job or a service call. And then... and then they, you know, all the steps in between through the... the width process or... the process of getting out any of these projects or jobs. And yesterday... Clint and I were talking and there's a, you guys have a very defined refiner, describe your, you know, projects or construction versus service to us.

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

TONY

15:24 It's... it's almost what I'm saying we do... we do on an accounting standpoint, we track three lines of revenue, maintenance service and what we call construction projects. We're the... job like a progressive change out which is a repair compressor change out Scott four or five different components parts that build up the in the estimate and it's got a couple of different labor descriptions, right?

*--- Quote templates ---*

TONY

15:53 Well, we're doing to compressors and... and maybe condenser fan motor, and... and so capacitors load that just start to add to that list. And so when does that repair start? Looking at a lot more like a construction, which is the same type of thing, this is Scott where items in it and... and more labor at the buckets.

*--- Quote templates ends ---*

TONY

16:16 But really we're just building up a more robust repair item and... and calling in construction. But it should look and feel same to us because we're tracking cost whether it's a two hour turnaround or 20 day turnaround we're tracking the same.

LAUREN

16:35 I see what would you say?

*--- Type of work ---*

LAUREN

16:37 And just... just simply because I'm curious what would you say is like the percentage like revenue breakdown between your maintenance, your service and

what you consider construction? Is it like equal, is it... is it skew heavily in one direction or the other?

TONY

16:53 Story lately, we've been a 50 50 business. Okay. But in the last five years, it's probably been 70 80 maybe construction because that's where in a strong academy where our customers are making a repair VS replace decision they're replacing right now. Is there... might be on the verge of rolling over, we can like get more than repairs, you're coming up?

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

LAUREN

17:21 Okay. Okay.

TONY

17:23 Very well.

LAUREN

17:25 Okay. So what I'm thinking and something that Clint and I talked about yesterday is I'm... I'm sure he conveyed to that, you know, service trade as our name would imply. We... we really cut our teeth in the... the service. And I'm like preventative maintenance sort of realm. I don't wanna do what your current provider may sounds like may have done and over promise you something that isn't part our application at the current time. And... and what I mean when I say that is... is we've got service lift services easy. We are actively developing and... and are in like phase two of rolling out.

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

LAUREN

18:14 I'm pretty comprehensive project management functionality that addresses a lot of the things you just touched on related to real time costing, you know, visibility of how you're tracking to... to your budget, like change orders and things like that. But I'm not gonna sit here and show you things that are on our road map because they just don't exist yet.

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

LAUREN

18:38 And I want to be very clear but what I would like to do with our time today, if it's all right with you is show you what we do super... super well from a service operation standpoint. And then if that all looks aligned with your needs from that regard schedule some time to talk further about the project management functionality that's... kind of... kind of being baked right now. What are your thoughts on that?

TONY

19:06 Good. You use... a road map which is really become a curse word around here.

LAUREN

19:14 I know. Yeah, that's why first rolled out roadmap is you don't talk about the road map which is what I'm not doing.

TONY

19:23 And so, yeah, I mean we definitely want to talk with Clint yesterday sounds like and I watched your video on online and there was a customer come back or one of your customers from back east was talking about projects... in fact, specifically about projects and they look like some pretty good sized projects that... that projects we would be doing.

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

TONY

19:50 And so that and Clint made some overage or is that, yeah, there's some things already rolled out and more things... I'm not as concerned about Gantt charts right now as I am about or even AI... I think that will come.

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

TONY

20:07 But what I do want whether again whether it's service or construction, it's all, you know, it's just, it's very much the same to us is just to have that real time costs are tracking. And so we need to do a repair job and track that costs over a five day period by the repair. Then we should be able to do the same on construction enterprise.

*--- Purchase decision ---*

LAUREN

20:35 Yeah. Sure. Well, we'll... we'll show you that. So, Clint, do you wanna kinda... kinda start sharing a little bit of the... the application so they can start kind of assessing how... how we fit into their workflow?

CLINT

20:49 For sure. So what you see here on the screen is really just gonna be you're 30,000 foot view of what's going on.

*--- Purchase decision ends ---*

CLINT

20:57 You know, with all your jobs and customers and everything. So we can see here that there's a few buckets. We can see what's going on today. We can see, you know, anything that might have slipped through the cracks or something that's overdue that we need to get appointments on what's coming up in the next couple of weeks that we need to get appointments on also within service trade, the technician can go and complete that job. But also on the back office, we want another set of eyes on that. So these are jobs that the... the technician has completed, but the back office needs to mark them as complete. And then once they mark those complete, you can see that there's another bucket that are completed, but these needs to be invoiced out. Now... makes sense there. So far? Yeah. Okay, perfect. What I wanna do now is I created a job for you guys. So before we get into the job, I want to show you kind of what it looks like with the customer. I told you that we do commercial only so you'll know the... the Bill to the ship to type of thing.

--- *Recurring maintenance* ---

CLINT

21:59 But if we want to look from a customer standpoint, we can see all of the services. So whether you're doing one time services, preventative maintenance type services, you'd be able to see all the services that have been performed so far at this particular site, it would be able to see any jobs.

--- *Assets* ---

CLINT

22:17 So as far as being able to go back and look at any previous jobs, all of their assets. I told you we do very good job as far as you know, managing assets and you can see alarm devices for your guys, this case H, back unit type of thing.

--- *Assets ends* ---

CLINT

22:31 So being able to go in and see all of this customer information, just with the, you know, easy quick button here and there. I know that that's a big thing for you guys is not having to click... click your stress to death to get something. So being able to have this according themselves to be able to... to look at that will make it nice and easy for you guys. But really just to have all of this information from a customer view standpoint... if we look at a job that I have already created here, I know that you mentioned earlier and we spoke about that yesterday is being able to see what that service in that level of detail.

--- *Quote templates* ---

CLINT

23:06 This is... looking at. This... this is going to be what the description of that service that your technician is going to be performing. So they're able to see that. From the back office standpoint, you can also edit then this was a previous service day. It's been done and already set with those descriptions and also being able to add any items. So, I know that we spoke about once we have the services, whether it's you know, the template of the quoting that we're going to him. But seeing a little bit later

on, not only are we going to have the description that service, but you can also build these out to where you have pieces of equipment, mineral manner.

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

CLINT

23:42 The office can come here and simply edit this, being able to, you know, whether it's trip charges, you know, certain parts, things of that sort. They would be able to select that there. And then also being able to look at those clock events like you mentioned on the time card, you probably got an email earlier that I was in route. I don't know if you've checked it, but we'll be able to look at that and show you how the technician can... can map those clock events, and then be able to... to look at all the other information from a back office standpoint. Any questions as far as the... the... the job itself or the service that's going to be completed? Any job items? Any questions so far?

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

TONY

24:25 No, I guess as we get deeper into it will have some questions.

CLINT

24:31 How does this compare so far to... to what? You know, I want to compare to field one as far as being able to... to understand and... and easily navigate through this job.

TONY

24:42 I mean, it looks clean. It looks good. I don't know if you're sure if that say, well, it looks good. One one thing to learn to be concerned with is a lot of white space on our computer screens because that means there's less data there and more navigation that we have to do. And so from an internal, the office standpoint, we're learning and we've had correct our current provider and they, they've done a good job and consolidating and providing more data for view per screen. Looks. So I... I don't know completing what I'm looking at, but I know that a lot of white space is not necessarily.

CLINT

25:35 And you, and you mean as far as whitespace, like if we had this and you're having that information?

TONY

25:40 Well, just if you click that... how much data we can see in one view saves us from necessarily clicking to see more data. The things that... that we noticed when we... when we migrated from feel one to BuildOps and feel one, we can see a whole lot of data in one view, right? And we can drill down and see more. But what happened when we moved to BuildOps, is... is it a lot of white space on our screen and we're clicking. They were clicking again. Then we'll click it again and analysis, you know, getting virus or wherever navigating around. So the more that we could

matrix type of design or window happens I multiple windows that seems to be more efficient in terms of... of getting around navigating through a screen.

--- Invoicing ---

TONY

26:38 So, but this might be fine. You know, we'd have to play with it to see, you know, we... we did type stays in terms of clicks, how many clicks it takes to accomplish it given tasks, but we didn't actually time which once we get rid of clicks, you know, then how many different screens do we have to go through to say generate an invoice and approve the invoice and send out an invoice. So those are the kinds of things will be looking at.

--- Access to information ---

CLINT

27:11 And it won't be able to get to that once we get to that quoting portion and the invoice Bush. Perfect. Okay. So now that this job is here, like I said, I'm gonna keep this nice and pretty for you. Now. I'm gonna go from the technician standpoint, so I'm going to mirror my iPad here, but this is my iPad that I have here.

--- Tech On-site ---

CLINT

27:33 So first thing that we look at obviously the... the clock you can see at the bottom the in route. So I sent you that email, you know, 31 minutes ago. And now I can simply go to clock out from in route. It's gonna ask me, hey, are you on site? Simply just hit? Okay. And now it's already started my own site clock event there. As we go through... through, this... this is the... the work order itself. We created these blogs to make it simple where the technician can simply go in, look at the services. Hey, what am I going to be doing?

--- Deficiencies ---

CLINT

28:06 Is I need to see, you know, everything we created, just more like of a checklist on this... this type of an example here, but they can see the details. They can go in create oops. Sorry, hit the wrong button. They can go in and add any attachments they need to, on these particular attachments, they can do voice recordings, videos, things of that sort... just from their device there. We can also look at the job items. Are your technicians adding any... any job items or are you guys handling all that in the back office?

TONY

28:39 Typically, the back office does it the recommendations or as you defined efficiencies they put those.

CLINT



28:47 Okay. We're going to.

*--- Tech time tracking ---*

TONY

28:49 Your, when you clock, so you said email that's dedicated he's in transit. I'm guessing those hours are being log to this job or that time is being locked in this job? Always a transit. Is that correct?

CLINT

29:03 That's correct?

TONY

29:05 And then clock in that onsite time and maybe for our customers benefit, but still or log in the job cost to this job. Okay?

CLINT

29:14 That is correct. Okay. Let me.

LAUREN

29:18 Something, so there is in service trade... I distinguishable difference between actual time which is the... the active clocking in and out of the job, whether they're on the way on site et cetera. So that you can track the actual time that information doesn't automatically go into like a job costing for... for this job, that would be, that would be accomplished in the billable time in the job items themselves. So you can, you would... you would need to coach the technicians or have someone in the office allocate the actual, you know, time, your billing the customer to that in that job item in order to kind of track that billable time for costing purposes.

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

TONY

30:15 Okay. Yeah. And I... and that makes sense. We... we have to do that. We... we have that challenge with regards to the software. There's always, you know, I'd love point. Is it fair to put this windshield time on this current job?

LAUREN

30:35 Right, right. And not to mention California. So we'll table that for now because we know there's some complexity there. We'll talk a little bit more about time, but I'll I... I digress, I'll let Clint continue on.

CLINT

30:56 Just so we can go straight into it. Like I said, what we call deficiencies that pulled through work.

--- Deficiencies ---

CLINT

31:00 Now, if they wanted to go through, you know, any recommendations that we mentioned here, they can simply go through this deficiency. Let's just say... okay... just a broken compressor here.

LAUREN

31:23 Next.

CLINT

31:24 We can go here, take a photo. I'm just gonna do it on my screen here. We're gonna use that for now. We can go here. We can add it going through here. It's a couple of steps just to say, hey, is it in operable? What's the... what's the severity of this? We'll just say it's an audible. We can go and control it and put it to what we need to here and let's just pick one... there. You know, it goes into the next. So now what we do is we just simply save that. So once we save that, there's gonna be a notification that goes into the back office. So whoever is going to be handling all that particular quoting or anything like that. So what I wanna do is I want to go back into that to stay with the... the workflow. And I'm gonna take you into the back office to show you where this deficiency is. So what are your thoughts and questions on that recommendation that we did from that standpoint?

--- Forms ---

TONY

32:24 Fine. All those fields are customizable. I'm guessing...

LAUREN

32:30 It's fields.

TONY

32:33 On the here deficiency, you know, full through stuff.

CLINT

32:40 Man on the app itself.

LAUREN

32:42 So, as a SaaS application, there are some limitations on what type of customization you can do. Just some of the way things are labeled. Now, obviously, like your asset list is the list that's gonna populate your service lines.

--- Deficiencies ---

LAUREN

32:57 Like the type of work you're doing is what's gonna populate. But like... like the terminology of like suggested deficient in operable, that's kind of static and part of our application.

TONY

33:11 Okay.

LAUREN

33:14 What would you change it to? Just curious? Like what... what would you change?

TONY

33:18 Well, we may not be as... as you're using different vernacular that we do.

LAUREN

33:22 Sure. Yeah.

TONY

33:25 So... depending on, you know, I didn't look too deep in it, but we have different terminology. So, but that's not a problem. Okay?

LAUREN

33:34 Okay.

CLINT

33:37 Now if we go back into that job that originally showed you and go under these deficiencies, you can see that this broken compressors right here.

--- Assets ---

CLINT

33:44 So I simply just want to open the open this detailed up to see this information to see what the technician, you know, filled out what kind of information that they have given us. And so now when we're looking at this information, we can go through and look at any history, any related there's any quotes already.

--- Quote templates ---

CLINT

34:04 But now we can simply go and this is where we're going to start to... to do the quoting process. We can simply go to add to quote I'm gonna create it. We can look at what kind of job type it's going to be. If we're putting a certain type of contract on this particular one, the expiration date, let's just do for the end of this month, what the asset was the service line, what the problem was, so normally go to create this quote and what's gonna pull up the information to being able to put all that

description that we spoke about yesterday, Tony. And then also if we want to go and apply these quote templates, so as we go, and as you guys are starting this off, you know, we always recommend, hey go ahead and put in those quote templates especially if you're gonna continue to use them thing. So you can do it manually here. If you need to add any service, if you need to add any parts, labor items, that type of thing. But we can also go to this apply quote template. So when I go to apply this quote template, this is going to be that drop down of every quote template that you guys have. You can type in here. I know I said it wasn't broken compressor or whatever the case may be. If I have one of those particular quotes. So I can just scroll down and look at each one or type it in whichever one you want. So let's just putting us H vac, standard work templates. You can see that this particular one has these parts or items to it as far air filters, thought town labor, that type of thing. And now I can add these items within that description. So we can have among description laid out a short when I'm like we were saying earlier yesterday, if we need to, we can go in and make this an edited. So you can put in whatever fields you need to... to be able to put that information in. And then also if we need to add any job items associated with this particular quote that needs to go out. But we can see that we have this information here with the grand total those we're going to calculate this gross margin based off of the... the pricing that you have on your particular items, but you can go in and edit this information as well from a back office standpoint, to go in and on this quick.

--- Quote templates ends ---

CLINT

36:16 Any questions in regards to that kind of answer, what you're referring to yesterday, as far as these editable fields and stuff?

--- Quote templates ---

TONY

36:25 Yes. And then on... those... those line items that you have there. So this looks like with the exception of margin that the... the face of the proposal will look something like this layout, is that correct?

CLINT

36:44 So, there's a few different kinds of layouts we can do. So if I go into edit this, we have this drop down to where you can go in and do line item type of detail.

--- ST app contracts and pricing ---

CLINT

36:54 You can summarize by the time. You can just do a grand total only. How are you guys doing it now?

TONY

37:01 That's good. We get all the above for different circumstance. Most part. We don't show line items and then also the... the line item order. Can I move certain things up and down?

CLINT

37:19 Yes.

TONY

37:20 Perfect. Okay. As ridiculous. Does that question sounds? We can't do that now?

CLINT

37:27 Yeah. It makes sense. I get asked all the time because people like their ducks in a row, the way they weren't that presentation to go. So I totally understand that. Okay. So now, what we'll do is I want to be able to send this to the customer.

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

CLINT

37:43 We want to see that customer view. So if we come in here, they'll just send to the customer. Okay? Should have you listed as a contact right here? Let me minimize that. So now I'm gonna go to, there you go, my primary contact. I can go here to say, hey, do I want the attachments to go with it? I'll say, yes, send that. And since I sent that, are you able to pull up your email or no?

TONY

38:09 Do...

CLINT

38:09 You want me to? I'll just put, I'll just pull it up on the screen for you.

CLINT

38:15 But this is what you would see if you got it would be obviously your logo on there. But then you can come through. You can have the line items, your t's and c's this is just gonna be based off of, you know, how we chose to do that.

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

CLINT

38:29 I just left it on this one. But yes, we would have all your description of work of what you're quoting out everything. Yeah. What do you think of the look and the feel of this?

TONY

38:40 Good. I think that's good. And I like that... that the advance notice or, you know, Clint is on his way, that type of thing. So that's all good. The, I had a question on the pictures from a mobile app as... as our guys are in the field and they're doing sending pictures. How does that is it is, do you guys have some kind of fresh in technology

whereas it being sent to that being said the sharepoint or how's that we're... we're micro points on that?

*--- Accounting integrations ---*

LAUREN

39:18 So... yeah, we use a WS, Amazon web services as our... as our back end and there's no limitation to the amount of like photos are files that you can, you know, have in your service trade accounts. I think the file size limitations like 99 megabytes, but that it just saves that as... as that... that file, whatever the technicians kind of take the picture of.

*--- Access to information ---*

LAUREN

39:48 So, and if they happen to be off line, it just caches. So, so it'll... it'll automatically upload in real time once they have service again, does that answer your question?

TONY

40:02 That offline was gonna be my next question. So you'd after that?

LAUREN

40:06 Okay. Yeah. There's some things they can't do offline like if they're in a basement, they, they're not gonna be able to clock in because, you know, it captures their like GPS location and you can get around that with just training like, hey, if, you know, you're going in a parking garage like clock in beforehand.

*--- Assets ---*

LAUREN

40:24 But... but once they're back end service arrange, it caches all the other information they've collected related to the... the files, the pictures, the I'm deficiencies they've recorded the, you know, job items. They've... they've captured all that stuff they can do offline.

TONY

40:43 Okay. Well, the technicians be able to see the history from the previous technician?

*--- Quoting ---*

LAUREN

40:49 Yeah... they can definitely.

CLINT

40:54 Yeah, and well, and I'll show you that once we get back into the technician side, when we go to close out the job... Tony, did you end up pulling this up on your email?

TONY

41:06 No, it's actually. Okay. Bye.

CLINT

41:10 No worries. I just, I was going to get you to approve this because I know that history was also important to you as far as the history of this quote. So I'll just go ahead and approve this.

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

LAUREN

41:22 But I can do since you're a read only view, you're not available, approve it that I sent it from my client portal. So I'll go ahead and do that.

CLINT

41:31 Okay.

LAUREN

41:31 Perfect.

*--- Quoting ---*

CLINT

41:42 Hello, Lauren just mentioned there is she went into the customer portal and approved it.

TONY

41:48 Okay.

CLINT

41:48 Will be able to see that, yes, it was submitted here and now you're going to be able to see that is approved. But now the customer approve that. But what I want to show you here is ended up showing you the history of this. So if I go up to the, this quote history now, you're gonna be able to see when this quote with the attachment was added, the draft, when it was made, you're even going to be able to see who viewed it and who approved it. You can see from, you know, the IP address, everything.

*--- Quoting ends ---*

CLINT

42:19 So you're gonna be able to have the history of this quote, the time stamps and everything. Is that what you were looking for, Tony? As far as history?

TONY

42:27 Yeah, yeah... yes. And now the issue in the field, yeah, it can be able to look back and see what was done before and comments and stuff like that. So, yeah, that's good.

CLINT

42:41 Well, as we do that, let's go back out. I want to go back.

LAUREN

42:45 Hi, I'm Clint. The go back to the quote for just one second because I remember you're telling me yesterday that one of the, one of the topics of your discussion was how many clicks it as currently required to accomplish seemingly simple tasks.

--- Quoting ---

LAUREN

43:01 I do want to call attention to how easy it is to create a follow up work quarter from this approved quote. There's literally a button that says create a job from quotes or you can add it to an existing job, but you can go ahead and click the create job from quote button and then select what information you want to go onto that new job.

--- Quote templates ---

LAUREN

43:23 And Clint, what click that button if you would. And like literally say, I want the attachments and the description to go on that quote or on that new job. And boom then you have a new job as soon as you click that create jobs, unquote button.

TONY

43:40 Okay. Let's say we create a job from scratch but we've got history and we want to pull picture certain pictures and apply those to that job. What does that look like?

--- Dispatch ---

LAUREN

43:56 It's pretty easy. Well, we'll show you what that looks like when we get to the dispatch that maybe we'll schedule this one in a bit. I just wanted to call your attention to that while we're on that screen. Let's... let's table that thought for... for I'm just a few minutes.

--- Tech On-site ---



CLINT

44:15 Sorry for jumping to the technician. Okay, perfect. So now we go back out to the technician view. So for here, we can see this information as far as, hey, I need to go into my services. I want to be able to mark all these complete let's say there's done details. So we're looking at this information here. So if we... we go through, we want to go through any of the assets, are you guys getting any worse acknowledgement that you're needing to get signed off or anything like that?

CLINT

44:56 But so now we can go through if I want to look to go and clock out. So if I go to clock out of this job, it's gonna ask, hey, okay. Didn't want to mark, please complete that. We do want to go next. Are we done with this visit? Yes, finished clocking out. So now that job is going to be marked complete. I'm a technician standpoint. And now from the back office, we can go in and be able to... to invoice this particular job out. Let me go in this job here. Any questions on how easy it is for them to do that from the technical standpoint? Just a mountain of services complete?

TONY

45:37 Hello. Goodbye.

CLINT

45:39 Okay. So now we can see here that this job is completed from a technician standpoint. I know I can go in and from the back office, make sure that they put in the job items, whatever the case may be and simply just complete this job. It's gonna give me another set of eyes that we want to complete job and create invoice.

*--- Quote templates ---*

CLINT

46:04 Now, we're going to be able to go through once again, I'll make sure we have all this information that we have the right amount of items and everything simply create that invoice. And I can give that same look and feel like you saw earlier on the quote standpoint.

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

CLINT

46:25 He's me... now, it's gonna give us our margin what the total is all that same information I like you saw on that quote. If we think that that's all good and gravy and we're good to go with it. We're just gonna do the same thing like when we send the quote, we're going to send him this invoice link. I'm gonna pick... my particular.

CLINT

46:58 Hi, this is Tony. The same type of thing that I'm going to send you again here and I'll pull it up for you as well, but she can't pull it out. And this is a view that you would have from the customer standpoint, like yourself, that email that I just sent you... same type of thing here. But what's great about this is also, you're gonna have

like a live link. So, if I want to go to see the service details and give them more details on their information. So, this service link is now going to go through all of the description of that work that was completed, any comments that was added, if I attach any files which we have associated with this. And then also, any of, you know, what we call the deficiency to alert them to say, hey, you know what you have, this information here, which they've already known because you've already sent him that quote. But what do you think the look and feel from the... from the invoice standpoint, and then have this pay now capability to be able to pay?

--- Invoicing ---

TONY

48:04 Good. We... we don't well, I guess you have AC, H right now, but we don't take credit cards. Most of our customers that we deal with large... regional or national customers typically. So.

LAUREN

48:20 A lot of property managers.

TONY

48:23 Yeah. Would it be like cbre?

LAUREN

48:25 Yeah.

TONY

48:28 But...

TONY

48:32 The... and again, all the invoice we don't have to show all those line items that we choose not to?

--- Invoicing ends ---

LAUREN

48:41 Correct.

CLINT

48:42 Right.

TONY

48:49 We're doing? Okay. Right. Yeah, that's kinda nice you want to do... for right now? Yeah... I guess no worries. Yeah. So, yeah.

LAUREN

49:10 Okay.

TONY

49:12 Missing... seems pretty good. I guess. Okay. That's great.

CLINT

49:21 Okay. So as far as the... the... the clicking, you think that being able to go take that from quote to invoice is easier than what you're doing now and how does it compare to what we should be comparing it to the field one?

TONY

49:38 Yes, it's better than both, I would say right now.

TONY

49:46 Yeah. So if you don't mind, I mean, it's really that easy. Can you... can you show for brand? Seeing again how you took it from quote to invoice?

CLINT

50:00 Somebody want to delay?

*--- Quote templates ---*

CLINT

50:09 Job? Sorry, I'm going to close some of these... open jobs here.

LAUREN

50:16 Hello, Clint. I might suggest that I'm using that repair job that you just created for that quote... that already has items on it?

TONY

50:32 That broken compressor one? Yeah.

LAUREN

50:34 Yeah. Yeah. You're going to need to refresh that page, I think.

*--- Quote templates ends ---*

TONY

50:49 I...

CLINT

50:49 Thought I had it pulled up. I must have closed it.

--- *Quote templates* ---

TONY

51:00 Right one. It says she's the vision that efficiency. Yeah.

LAUREN

51:13 There it is.

TONY

51:15 So this is the right?

LAUREN

51:19 This is the job that we've created from the... approved... approved proposal that's hard to say approved proposal.

LAUREN

51:34 So, it's easy to pull it from here. You don't even need to add a job description because the scope of work from that approved quote shows up as description on the new job. Clint go ahead and just schedule that for today.

--- *Dispatch* ---

LAUREN

51:56 So, this is one way of scheduling. Obviously, we have dispatch boards and like I'm a geographical map, they scheduler, you can see that we already have items associated with this war quarter based on what we proposed to the customer. And of course, the technicians would go through their workflow of, you know, clocking in and out, recording all the pictures of what they've done, recording comments, you know, fill out any specific paperwork.

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

LAUREN

52:30 And then once this job has been completed by the text, the office reviews it, Clint can scroll up and click the I'm complete job button. We'll just pretend like we... we did the technician stuff. You would literally just say complete job and create an invoice since all the items are there and the technicians did everything we expected them to do. And then Clint can create that invoice. And then we have an invoice.

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

LAUREN

53:04 Is that clear, Francine? Did you have any questions about that?

TONY

53:08 Lets you do that invoice. How... let's say we want to change... the... the, well, well, let's say we want to change the dollar about?

LAUREN

53:25 Giving...

TONY

53:26 A quote, can we customize the invoice itself? Or even on a time and material, let's say we're there for an hour and a half, or we want to charge three hours?

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

LAUREN

53:37 Yeah, definitely. There's... there's a system of checks and balances, and you know, that's kind of up to you guys in the office to say, alright here's, what the technicians did, using my best judgment, what do we ultimately want to build a customer? So you can... you can come in here and say, now this is a little bit different because it's quoted and let's pretend that it's not something that we agreed too, but Clint could go in and... and increase the quantity of the labor from one hour to three hours and actually put in a different price in there.

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

LAUREN

54:14 I can actually see zeroed out right now. So, Clint go ahead and put like 75 dollars and for that price. So it's really easy to... to make edits like that after the fact.

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

TONY

54:28 And is there, if we did, and it's like that or the timestamp as or some?

LAUREN

54:34 Yeah. Yeah. Clint. There's a detailed level for customer and make it grand total only because I want them to see what that looks like too.

LAUREN

54:50 And then save it and then show it.

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

LAUREN

54:58 So, this is what the invoice would look like from this quoted job that we just did. So there's no, there's... there's a note there. I have it set up. So, so this note goes on all invoices, but you can kind of customize each one depending on the situation.

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

LAUREN

55:14 The grand total is there. And if they went to the service details that blue arrow, that would show that the customer sort of a comprehensive summary. And then they can pay through AC H. You can... you can set up your payment acceptance rules. You don't have to do credit cards. You can do AC H as well.

TONY

55:33 What that screen that previous screen we're looking at? Would that be in the form of an email? This is what we would email that blew. It would show up at blue on their side.

LAUREN

55:44 Yeah, this is exactly what your customer would see.

TONY

55:47 It does it.

CLINT

55:49 You're gonna be able to, you're going to be able to look at that in more detail as well, Tony, because you'll have that in your email box, the previous invoice and quote?

TONY

55:57 Hey, I was looking at it through a browser.

LAUREN

55:59 Yeah, it'll they'll get an email that says, click here to view your invoice, and it'll... it'll they click that link and it'll open this up.

TONY

56:07 Okay. I see you already. Yeah. So, you know, most of our, the vast majority of our invoices go through a portal.

LAUREN

56:18 Sure. Okay. So you can... there's a... there's a couple of buttons above that pay. Now button. You could like download this file since cbre is not gonna make your life easier in that regard. You can download the file and like upload this to their portal as well.

TONY

56:36 Or, yeah, actually, some of them are really a pain in the rear. We have to type in all the information, all the line items one by one into their portal.

--- *Paper process* ---

LAUREN

56:47 Yeah.

LAUREN

56:52 Yeah, I don't know that will necessarily help with those headaches other than getting the information from the text back as quickly as you can, but that's the sad reality of working with these giant corporations with their own portals and stuff.

TONY

57:08 Yeah. And it's not making things more.

--- *Paper process ends* ---

TONY

57:17 Okay.

LAUREN

57:17 What else? Should we show you? What else are you guys interested in seeing? Maybe... maybe some of the scheduling boards?

TONY

57:23 Yeah, this batch would be good.

CLINT

57:32 Hello, this is obviously a demo site. So we have quite a few here, but you can see that these are the jobs that we were working on here.

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

CLINT

57:40 You can see the clock in events and that this job is completed with the check mark. If we need to, we can go straight from the dispatch to say, hey, we can go and add a job from scratch here. We can search that location, get all that information that needs to be associated with that.

--- *Dispatch* ---

CLINT

57:58 We can also go in and look at available jobs that haven't been scheduled out here. So if I wanted to... to go into these available jobs in there, you know, by office or type of that type of thing, I can go through and simply just go and drag and drop and pull these down and go ahead and schedule these out as well. Anything particular that you might want to, wanted to see as far as the dispatch board is concerned.

TONY

58:27 The, is there I see you got a green, a gray? Is there... I don't know. One of the things we're having designed in right now is if we anticipate or repairs gonna take six hours we go. Are you having a, not an hour glass? But basically the shaded color going along with the time line showing where we should be in that? And at the same.

LAUREN

58:54 I think I know what you mean. Click that Abbott job that you're looking at there, just click it and see that double line on the right hand side. Drag that out. So that's how you can like block... like... like a chunk of time for that specific work order. So this one's now for about three hours that you can see... is that... is that what you're asking?

--- Tech time tracking ---

TONY

59:21 Yeah, it is. And then what happens is, you know, we're putting on our dispatchers that they've got to, you know, try and get these guys on... on track. And if we're anticipating this job is gonna take three hours and we're an hour and a half and we got shows and it changes colors as we... as we get closer and closer to the end. And so she can quickly check with them to see.

--- Dispatch ---

LAUREN

59:48 Yeah. So we don't have that type of functionality. But if Clint, you click that costco job down at the bottom, those, that dark blue in light blue line at the bottom, this... this view is like so real time. Like if I were to clock into that habit residence job, you would literally see like a dark blue dash like show up so that longer that light blue line is... is the... the amount of time that they spend on site. So you'll be able to kind of figure out like, okay, they've been clocked in all the way to the end of that job there. Like maybe we need to push or reassign their next dispatch because this one's running long.

--- Tech On-site ---

LAUREN

1:00:30 So you'll... you'll be able to see in real time when they're clocked in and route on site doing job prep. And in fact, you'll be able to see things like when they recorded deficiencies uploaded paper, we're taking pictures, all that kind of stuff from this board.



TONY

1:00:45 Okay. That's good.

*--- Tech time tracking ---*

LAUREN

1:00:49 Yeah.

TONY

1:00:53 So, I have a group of tax time, the same job. Can I assign them on that same?

LAUREN

1:01:03 Absolutely. Yeah.

TONY

1:01:05 But if one pops in this isn't, did they have their own individual clock in on that report or with isn't gonna clock in the hall? And at the same time?

*--- Recurring maintenance ---*

LAUREN

1:01:13 Nope clock them all in individually. In fact, that's one of the, one of the nice things about service trade is... is a single job like the one that Clint minded can be assigned to multiple technicians. You can even have multiple services assigned to that job. So maybe you have I'm gonna, this is a bad example. But maybe you have like some kind of maintenance do while also working on a repair and you just put it on the same work or that's not super realistic, but you get the idea so you can have multiple services. And then everything that this individual texts are doing, we'll sort of have consolidate into that single work quarter.

*--- Recurring maintenance ends ---*

LAUREN

1:01:52 So you could potentially create one invoice for two technicians, work on two different things on the same day or a few days. It's kind of up to you like... to determine what's the best case scenario for each type of thing you might be doing.

TONY

1:02:10 Okay.

TONY

1:02:18 Good. Well, we can't it's... it's like one... week.

LAUREN

1:02:25 On whether or not.

TONY

1:02:27 The one being centralized had one that's good.

TONY

1:02:40 Yeah... I don't know if you caught that when she's describing.

LAUREN

1:02:46 Hi, Donna. How are...

CLINT

1:02:48 We getting? Yeah, the audio didn't come out.

TONY

1:02:51 Collins about to pass system or to our passive, our current or past system technicians, we have to copy and paste the job description in each one of the text block... block of time.

--- Tech time tracking ---

TONY

1:03:08 And so it's really, yeah, we'll... we'll have crews have cancelled guy. It's a lifetime. And then, so currently, we don't have to do that. But the problem is the price we pay for that is when the lead clocks and they're all clock. And so if we can just create one job... site or on a lot of copy and paste, that's great.

--- Tech On-site ---

TONY

1:03:34 And then they clock in and out individually, then that's... that's a plus as well.

LAUREN

1:03:39 Yeah, Clint click open that job that costco job that you've got down there and open up the details and open up the job itself. Go up to the top... right next to the job number. There's that little link, click that. Yeah. So this is that job that we did. I actually clocked in and did some things while Clint was talking sort of in the background that I, you didn't see me do them, but they're... they're so I actually clocked into this job, scroll down Clint.

CLINT

1:04:15 I was just showing them where they actually has two technicians on the job.

LAUREN

1:04:18 I actually logged into this job so you'll be able to see Clint clock events. And then that I actually didn't clock out like I was supposed too. And then if you go down to the attachment section, I actually took a picture. And from a job history standpoint, like you were mentioning earlier, you're gonna be able to see who made changes to each job at what... what time? Everything's like date and time stamp, and they can work independently of each other? And all that. It's like kinda consolidate into this one spot.

--- Tech time tracking ---

TONY

1:04:52 Very nice. Can you that at times from the back office? So that you brought up correctly, is there a way to edit that time to the?

LAUREN

1:05:01 Sure. Yeah, that's easy to do. Clint can click that little pencil and like, actually, you know, clock me out if you wanted to or say like I was supposed to clock in earlier, like he can adjust the times and things like that.

TONY

1:05:16 Hello. This is the, this is an employee payroll record, right?

LAUREN

1:05:25 Since you're in California, I'm gonna say... now... now it can captured their time specific to work orders. What it's not gonna do is account for like lunch breaks or company meetings that you might have. I'm... I'm... I'm really sensitive to California labor laws. So, our... our customers in California, have they... they all have this issue of like, how are we gonna, what is our payroll record of truth? This service straight help with payroll, of course, but it's not meant to replace like a true payroll application.

TONY

1:06:04 But we could, yeah. So we're all dealing with the same thing.

LAUREN

1:06:07 Yeah.

TONY

1:06:08 We'll create a job for employees or whatever the case might be.

LAUREN

1:06:13 Yeah. Yeah. That's a common... a common sort of solution to a very tricky problems resolved.

TONY

1:06:22 Hello, the question for Jose is that when they clock, you know, we make an adjustment and then that time gets posted that's kind of locking down mechanism on their time. Is that becomes or payroll record? Do you have any such thing? And... and then how editable? So, for instance, we've got jobs right now where it guys got 1,600 hours on a two hour maintenance and...

LAUREN

1:06:53 We...

TONY

1:06:53 Can go in and fix it because the guy never clocked out sometimes ran on forever.

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

TONY

1:06:58 And this one, we're learning the program. And so, yeah, other, this ridiculous job costs, but we can't change it because it changes as payroll record, but we... we change the people record because he obviously is that you're paying 60. No, no. So... that shows up in your system.

*--- Tech time tracking ---*

LAUREN

1:07:16 Yeah. Any changes made after the fact because... because to reiterate anything with tax, I've done in the field can be like edited and amended by the office because there's that... that system of checks and balances. Any change that's made to like my time, we'll actually kinda cascade onto like a pay like a... like a time card report of the technicians can actually like some like review their hours and submit on a weekly basis. But if the office knows like, hey, get dumped, you didn't clock out.

CLINT

1:07:49 Last...

LAUREN

1:07:49 Night and it's I'm not paying for 20 hours because, you... you know, you've finally clocked out at eight o'clock in the morning for your next job like you'll be able to edit that in the office and then that will subsequently go onto their time like the correct time.

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

TONY

1:08:07 Does...

LAUREN

1:08:07 That answer your question?

TONY

1:08:09 Kind of our, for the most part, but let's go back to our old system. We could do the same thing you just described until we close out that week. And when those... those times are posted, that becomes official record and then it becomes, but we can't necessarily, no, I guess if you go into job.

--- Tech time tracking ---

LAUREN

1:08:34 I can edit o'clock, event from a past job. What... what that's not gonna do is like update whatever payroll things you guys need to fix that, come along with that. But it's it sounds like this isn't a super common occurrence like how often is this actually happening? Okay. Alright, fair... there's always one tack is in there.

--- Tech time tracking ends ---

TONY

1:09:01 In terms you guys clocking in and out, but that, but you're... you're right there's, always gonna be something that we've got fix an ERP and also fixing Quickbooks or whatever accounting system.

LAUREN

1:09:13 Yeah, it can be edited. Just... just say, you know, but... but there's like a sort of a waterfall effect of other things that would need to be edited as well.

--- Dispatch ---

TONY

1:09:23 Okay. From a... from a service manager standpoint, is there any thing on the dispatch screen that warrants the dispatcher that, hey, this guy's going way over time?

LAUREN

1:09:36 There's actually... tech scorecard, which you can see, I'm Clint. What do you want to pull that up? If you go up to the top and then pull?

--- Tech time tracking ---

LAUREN

1:09:51 I think it's jobs. And then tech scorecard. This is a nice view where you can kind of see on like you pick the time period like how long the technician, something clocked in and out. This is also a good visual indicator if someone's forgotten to clock out. It also kind of shows you like the total time for that... that time period. If they've

been late to any appointments with their like revenue is for that time period. So this is sort of a good at a glance type report where you can see that type of stuff.

TONY

1:10:26 Reporting. So we thought PC, but it's basically a actual versus estimated or rejected.

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

LAUREN

1:10:36 Not this report, but there's other... there's other ways you can get that information.

TONY

1:10:42 And when you do job costing and you account for labor, do you use a static burden rate or do you use actual pay rates technician?

LAUREN

1:10:55 You can set up those burden rates on a per technician basis?

--- *Tech time tracking* ---

TONY

1:11:03 They're...

LAUREN

1:11:03 Like your... your senior journeyman, and it's gonna have a higher burden rate than like an apprentice?

TONY

1:11:10 Bye bye class or by me of the technician or either one... works? Okay. Excellent. I can apply a dream and rate or Jim Smith.

LAUREN

1:11:28 You can do so you can put the... the burden rate or what we call the labor costs on each individual technician.

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

LAUREN

1:11:37 But you can also say like from like what shows up for the customer, you can say, okay, for... for the customer, we charge them 95 hours for journeymen labor, and then each journeymen might have a different burden rate. So that can certainly be set up the way... the way that you needed to.

TONY

1:11:54 Okay. And then this reflected in the actual job costume based on.

LAUREN

1:11:58 That's exactly right?

TONY

1:12:02 Isn't the case currently? Okay?

LAUREN

1:12:08 It sounds like, I know we're over time and I've... I've got a hard stop. Whoops. It's 10 minutes ago. It sounds like there's a lot more that... that we should probably dive into with the application.

--- Purchase decision ---

LAUREN

1:12:26 It sounds, you guys seem pretty detailed oriented and I definitely want to spend the time that you deserve to go over some of the workflows that are interesting, especially some of the project stuff as well. I know, I think... I think you're out next week or at least somebody is out next week. Would it make sense for us to schedule like a follow up conversation to do a much deeper dive into the application the... the following week, the week of the fourteenth?

TONY

1:12:53 It would and, you know, just... just a quick comment, my opinion and what else can jump in? I expected it really watered down... solution here. Instead, it appears to be a very user friendly and well thought out platform. So I'm like...

--- Purchase decision ends ---

LAUREN

1:13:17 Thank you. We appreciate that. I mean, we've been at it for 10 years, so we have quite a bit of a head start then some of the other folks entering the commercial market, but... but yeah, we... we take a lot of pride and... and being... being solely focused on commercial service contractors. And I mean, we've got, we've done this like 950 times. Maybe it'll be a customer 1,000. That would be fun and we... we take a lot of care and consideration and how we develop our product to meet our... our customers needs, and we... we collaborate with them to... to develop the product. So we can only take so much credit. I mean, you gotta think with folks like a read and western allied and JC Kansas jar, BMW mechanical, and each person account like you name it like they're... they're the folks that got us to this point. So we're really lucky to have great partners and our client.

TONY

1:14:11 Good, good. Yeah. So Clint, I will get together and swap some dates and... to precedent, well, I'm sure will come up with some questions in the meantime and.

LAUREN

1:14:24 Definitely send them... send them over so we can plan at all.

TONY

1:14:28 Yeah, and then start pressing into what you guys get hold on construction side. Yeah. I, you know, frankly, from what I see, we could use what you have... on our products. Yeah, just, you know, be horrified service and turn into a project but I don't see anything a showstopper for what you have, yes or some other bells and whistles we'd like eventually, but I think we can make work with what you've seen so far, right? Yeah. Yeah. Okay.

LAUREN

1:15:05 Great. Well, we appreciate your guys this time and... and your openness to, you know, a productive conversation. Clint will get up with you. It looks like the Monday... the Monday the fourteenth, we may be able to catch up with you all will be in San Diego for a couple of days for em, CA, and then we'll be back in the orange county area, the... the balance of that week too. So we'll... we'll coordinate some times and get something on the calendar and then, yeah, if you guys can send us any... any questions or workflows that you want to see in a next conversation, think like purchasing time cards, reporting project, let us know so we can get all of our ducks in a row and show you everything that you need to see.

TONY

1:15:49 Okay. You know, I don't know if it's too soon. I have Monday this coming Monday. I don't fly out, so.

TONY

1:16:05 I plan on Wednesday. So maybe even, yeah, Monday or Tuesday of those work for you too. So, but whatever... and then probably got, I might... I might as well. But so my name is probably good. Yeah.

LAUREN

1:16:21 Okay. Alright. We'll look at that and then send over some times and we'll figure it out.

TONY

1:16:28 That's great.

LAUREN

1:16:29 Cool. Alright.

CLINT



1:16:31 Thank you everyone for joining us. Hi. Thanks bye.

LAUREN

1:16:33 Talk soon.

*The End*