



ServiceTrade Demo with Calvert Controls Inc

Chris Kidwell with Calvert Controls Inc
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Participants

SERVICETRADE

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OTHER

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14439261676

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Transcript

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

DANIEL

0:00 Just put a message in the slack channel or in the message box here. Can you hear me Chris?

CHRIS

0:04 Can hear...

DANIEL

0:04 You...

CHRIS

0:05 Okay. I can hear them but I don't know if they can hear us?

JHARRIS

0:10 Can you hear you?

DANIEL

0:11 Hello. Alright. Yup.

CHRIS

0:15 Got you now.

JHARRIS

0:17 Okay. So, are... you guys doing?

--- Accounting integrations ---

14439261676

0:22 Good. How are you?

CHRIS

0:23 Are you... cool... cool. So, hey, I was going over the notes from the guy that had you guys on the phone and kind of book this demo and... understand you guys are on foundations using that for the accounting and you guys are using that for the

scheduling dispatching service at the... the service side of the business, that's... that's correct?

--- *Type of work* ---

JHARRIS

0:48 Sure. Yep.

CHRIS

0:50 And I'm assuming you guys have a rather large construction division?

JHARRIS

0:56 Hi, this is mark.

CHRIS

0:59 Okay. And...

JHARRIS

1:02 Roughly only 20 guy, alright?

CHRIS

1:08 20 guys on the construction side, and how many in the service side?

JHARRIS

1:12 15, this one like.

CHRIS

1:20 Okay. And do you guys are... are staying true with foundations? You're not coming off the foundations up for the... the construction side of the business, but you kinda do want to see what service trade wants to look like. Do you have like what does that look like?

JHARRIS

1:36 Right off the gate here's. I'll just kind of where we... we definitely don't want to waste your time during all the way started.

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

JHARRIS

1:43 So we, are we... we life validation or we, are we're forced to like issues the very best? So we're going to stick with that. We're going to double down. We're gonna learn it, we're going to use the tools and we are going to like, and that is that's what's going to happen. Now, things... we... we... we see the... the reason why this is intriguing is I wasn't sure if this integrates.

2:16 Mostly to me.

JHARRIS

2:19 To, to... to Foundation, if it does, this could be an option, if it doesn't then we'll probably is not an option. So we didn't know if this was some sort of enhancement to helping us track service and maintenance contract.

CHRIS

2:37 Yeah. Yeah. Okay. So.

DANIEL

2:41 Right.

CHRIS

2:42 That is essentially what we do.

JHARRIS

2:44 So, sorry, my, it guy called, I got something going down?

CHRIS

2:48 Yeah, take it. Go ahead.

--- Accounting integrations ---

CHRIS

3:43 So, yeah, I mean, the long story, short, right? Is, hey, we're going to manage all the service side of the business. Foundations. Does the construction side, they built their service module? A lot of folks weren't too thrilled are pleased with the service aspect of the foundations.

JHARRIS

3:59 Before you go any for... production side, it does all our accounting as well as our accounting or payroll, Austin, we use it solely for everything, right? So that's... that's how important it is anything to integrate with it. I just wanted to make that know before you proceed.

CHRIS

4:18 Yeah, no, I don't and we're not... we're not gonna take the place of foundations. I'm I'll take some of the lifting off of the service aspect inside of Foundation. But foundations continues to remain to be your ERP. And I think what Danny was saying is we now have a relationship with foundations where foundations was seeing people leave that ERP because they did not like the service functionality of what foundations could do. And they were going to different ERP systems. Hence they partnership

with us and foundations where we can fit that void if you will. Where folks are no longer leaving foundations because they can entertain a conversation with service trade and we can do what was required on the service side and not have to migrate off of foundations. So you use the term, do you have a seamless integration seamless in the software world is a, you know, being full transparent is a... is a big... big word. Do we have a seamless integration with Foundation? So I would say no, do we have enough communication points between service trade and foundations that it's working fine for other customers? Yes... right. And... and that may be a deal breaker right there, where at no point even entertain this conversation because we don't have a seamless integration. But we would tell you we have enough people now that are going through this beta and entertaining the different imports exports into Foundation.

--- Accounting integrations ends ---

CHRIS

5:44 And I can kinda go through service trade and show you where, why we're doing it that way and to see if that makes sense for you guys?

JHARRIS

5:52 Yeah. I mean, I think it makes sense at the word. Is this called? I don't know what it actually be the less it's unless it's... it's a deal breaker or other information on... that... that geeky and understand what, how to use a seamless in vain.

--- Accounting integrations ---

JHARRIS

6:12 Sorry.

CHRIS

6:13 No, I mean, you know, hey, I.

DANIEL

6:16 Yes.

CHRIS

6:16 On the whole transparency side, right? I mean, I'm not gonna tell you what, what's not true. So, I mean, I think from what I'm gathering, I think it's gonna be worth it's.

--- Purchase decision ---

CHRIS

6:27 Not going to be a waste of your time to at least understand what service trade can do if this goes anywhere to... to, you know, remains to be seen. But I can roll through this in about 30 minutes and show you kind of what we do. And I think it may make some sense for you guys. And then... the point they're being is I'm not gonna go into

the nitty gritty and waste everybody's time. Let me kind of give you a quick overview. And if it makes sense, we'll get into the nitty gritty is on conversation number two and number three. So I'm kinda just gonna get into this and I'm assuming you guys are doing quoting through foundations too.

--- Accounting integrations ---

CHRIS

7:07 So, let's just make that assumption. But here's... here's kind of what we do, right? And the blue bubble is our focus and... and how can we guys get you giving that best customer service to your customers? So obviously, we're going to overlap with the accounting, but we're never gonna take the place of the accounting system. So we have folks that use Sage... Sage, 100 Sage, timberline intact foundations computer is Quickbooks obviously. But what we do is we're going to manage all your technicians, all your service contracts, recurring services. So all of your preventative maintenance schedules, I'm scheduling, dispatching, obviously any sort of inspection paperwork or PM checklist, install checklist will handle in service trade... your equipment records that's everything out on site that you guys are managed service seeing on a regular basis.

--- Customer engagement ---

CHRIS

7:55 And obviously job costing and margin. And then really what we try to do is get your customers engaged with what you guys are doing digitally. So a customer portal, having service reports sent out to you to your customers via digitally quotes being sent out digitally to your customers.

--- Type of work ---

CHRIS

8:14 And we'll kind of get into that. And I'll show you real quick what that looks like. But our focus is going to be on commercial service contractors, right? So we don't do anything in the... the landscaping, the business, right? So nobody in field task management, nobody in the pest control, strictly commercial service contractors, people that are in the buildings on a quarterly monthly basis, doing all the PMS inspections and service calls that way... right?

--- Type of work ends ---

CHRIS

8:38 What are some of the things we're gonna do obviously operate efficiently for all of our PM or service calls up on a map and then drag and drop the technicians as to where they need to be based off of routes that will make sense for them. Customer portal, right?

--- Customer engagement ---

CHRIS

8:52 So that's kind of giving you guys access to a customer portal where your customers can log in and see past jobs, upcoming jobs, past quotes, invoices through the portal as well. If you want to invoice out a service trade, getting your customers able to be able to pay invoices through a customer portal. And then one of our big workflows is what we call pull through revenue. So that's kind of capturing what we consider a deficiency out in the field and being able to get that data back to the office and have that quote back sent back out to the customer as fast as possible. And how that pull through revenue gets captured inside of service trade.

--- *Recurring maintenance* ---

CHRIS

9:35 So, I will start with, hey location just to kind of give you guys a background on what the data model looks like, right? So inside of service trade, we have the concept to build tools and ship twos, right? So you can have 50 75, 100 locations under one Bill to... on a location page, we're going to track all of your services. And these services can be one time services that once they're complete. Obviously, they'd come off of this to do list as well as all of our recurring services right now. Just edit this specific one. But this is a quarterly PM that's tied to the chiller rooftop unit, right? That text box of the stuff that the technician supposed to do. And I'll show you what the text will see out in the field. And then we're going to track the scheduling window of this. And when it's due, the frequency of when it's do, right? So whether it be repeat every three months every six months, that would be a semi annual PM. Okay. And then when it is do by, so we have to do in a single day, it's just gotta be done in a whole month, whatever that PM schedule looks like. And then we're going to track all of the items that are associated with that specific PM. So every time I turn that service into an actual job, all of these items will automatically flow to a specific work order.

--- *Recurring maintenance ends* ---

CHRIS

10:50 Does that make sense?

JHARRIS

10:55 Revisit?

CHRIS

10:58 I'm sorry, I didn't hear that?

JHARRIS

11:02 Is it?

CHRIS

11:06 I think my internet might be bad data. Did you hear?

DANIEL

11:09 No, you guys are breaking up a little bit. I heard visit was the last, can we track each visit? I broke up a little.

JHARRIS

11:15 So I was talking earlier in near me, so I think... I think it's definitely our connection.

DANIEL

11:22 Yeah. Right there with you. Hold it. You're good to go. I noticed when you guys hold or you're moving that thing around you're... you're. Good. And then when you let it go a little bit of a sudden break up?

JHARRIS

11:44 No, no.

CHRIS

11:46 I cannot hear.

DANIEL

11:53 If you guys are having issues, you can also if you got like you can call in to this meeting as well to like phone or third party line. And we can communicate that way if we can't use the computer audio through Zoom.

DANIEL

12:14 Chris, I add the link into the comments section here for you, give me one second.

CHRIS

12:20 Me... sometimes if I stop the video at my.

CHRIS

13:00 Can you guys try now?

14439261676

15:36 Okay. Bye.

DANIEL

15:45 Okay. I think we've got you guys. Can you hear us? Okay?

14439261676

15:48 Yeah, I've... I've got you on my cell phone on speaker. So let me mute the... green here hopefully.

DANIEL

15:57 Perfect. Thank you for a troubleshooting with us.

14439261676

16:02 Yeah.

CHRIS

16:13 I think we're good now.

JHARRIS

16:17 Okay.

DANIEL

16:21 Let me do this.

CHRIS

16:24 Yeah, I got you now.

JHARRIS

16:27 That...

14439261676

16:27 Then, alright, are you might have here now? This is.

CHRIS

16:33 I think we are on your cell phone.

JHARRIS

16:35 You hear us now? Yes?

JHARRIS

16:41 Yes.

CHRIS

16:43 Can still hear you?

JHARRIS

16:46 I, yeah, that doesn't like Jennifer, his laptop, it looks fine, but for some reason, it's not... not working well. What do you mean?

--- Forms ---

JHARRIS

16:58 From that, the... the actual dispatches they populate based on the information is put in the.

CHRIS

17:08 Right.

JHARRIS

17:08 Work with Foundation.

CHRIS

17:11 So, for example, we will take all of the items that... that you guys currently use out of foundations and we can populate them inside of service trade. So we'll know... you know, two things on teen.

--- Accounting integrations ---

CHRIS

17:25 M, jobs will know typically what you guys have to match backup in the foundations from the... the receivable side of things as well as all of your recurring schedules will know what you guys have currently and foundations that we can pull out and put it into service trade.

JHARRIS

17:44 For you, she's worth, Jennifer is way more familiar with the... with the system a Foundation than I am, but I do know that we have current contracts in there now, maintenance... quarterly, biannual... automation. We have contract amount value. And then on top of that, we have all of our dispatching that the field P, field personnel received through their Foundation app on their phone... with the end game. If we switched over, are they still using the Foundation app to receive? No. So they're now they're using service like where's this volume service, right?

CHRIS

18:25 Service timecard that's...

JHARRIS

18:26 Right. We're using service trade app. And then now... now... now... all the features, which is going to be a big reason for us even going this route.

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

JHARRIS

18:39 When, if they get, if they get their work order, which would be generated now from service trade, they receive it, they do the work, they write their ticket. We have an old interface with the customer etcetera. What information transfers to

Foundation. And what doesn't I would assume is definitely cost, right? So, cost, and...

--- Accounting ---

CHRIS

19:06 Yeah. So, so the long story short here is we have what we call stack recipes and what stack recipes are on the service trade world. There's service trade accounting connector pieces and that's how we push data back and forth to the different accounting system. So... foundations has the... the... the concept of the capabilities of import templates.

--- Accounting integrations ---

CHRIS

19:30 So really the conversation piece there is, if you can get the template that you want for the data out of service trade, we can pretty much do whatever you want. What most people do is have some sort of our reconcilable reconciliation back and foundations of, I kick out, show me all the invoices from today.

--- Accounting ---

CHRIS

19:50 And here's all the invoices from today with all of the different items that we consumed on all of the different invoices and we'll know costing back in Foundation.

JHARRIS

20:00 Well, it hit... Foundation... Foundation as a lot of different cost codes... job types and GL accounts that it's based upon the type of work it is.

CHRIS

20:14 Yeah.

14439261676

20:15 So...

JHARRIS

20:16 Mapped in frustrate.

CHRIS

20:20 So, two things that we have here is we have the concept of what an external ID, right? So we can, that's how we can map basically locations to the different locations and foundations, right? So there would obviously be a foundations here that we would map that... that way.

CHRIS

20:37 And then just bear with me here as I come down here for the different job types, right? This is just one way I'm showing you, I can show you install construction service call, PMS, right? Priority service call installation. So we can map the different types of calls based off of different job types and service trade to the right GL.

JHARRIS

21:00 So, wouldn't be an issue. This would kind of live on its own and it can integrate from it looks like with our GPS system with obviously customer portal is a big thing for us. We'd love to have that which we don't have now... disrupt your presentation, but I'm sure you're gonna go through it all gets a little bit of the nuggets that.

CHRIS

21:22 It breaking up a little bit on me again?

CHRIS

21:33 Yeah, I can't hear you Jake.

JHARRIS

21:39 Yes.

CHRIS

21:41 You got now. I got you.

14439261676

21:45 Alright, call in. Can you hear us?

14439261676

21:46 Okay. I...

CHRIS

21:48 Got you now.

DANIEL

21:49 Right. Well.

JHARRIS

21:50 We'll call.

CHRIS

21:53 Okay.

--- Pricing ---

JHARRIS

22:04 Yeah.

JHARRIS

22:12 Hello. Can you hear us?

CHRIS

22:13 I got you now.

JHARRIS

22:15 Yeah. What's the meeting ID again for the?

CHRIS

22:17 Should be four, one, seven, zero, three, one seven, nine.

DANIEL

22:22 Zero.

--- Pricing ends ---

14439261676

22:44 There we go.

CHRIS

22:45 Alright. So I got you now. Can you hear me?

14439261676

22:52 Yeah, I hear ya.

CHRIS

22:54 Okay. Alright. So, Jake, what was your question? I'm sorry.

14439261676

23:01 Hold on one second. We have an echo now.

14439261676

23:04 You know? Yeah.

23:17 The question was, what... what are the... the hot points that would make us wanna move to use both service trade with Foundation? Okay. What are the, what are the hot topics that would be of interest for somebody?

CHRIS

23:33 Yeah. So, do you guys still have an echo? My goodness.

14439261676

23:38 We do, but you can... you can go from.

CHRIS

23:40 Yeah. So... the... the... the, there's a couple of big things there. There's a couple of hot topics and kind of jumping all over the place a little bit. The ease of tracking all the recurring services is one big thing, right?

--- Recurring maintenance ---

CHRIS

23:54 Having all of that here, being able to... to run a report of what that looks like and schedule out all of my PMS, having the jobs organize it a location. The big thing is the deficiencies and the quoting side of things. So we kinda call that a revenue generator for us, right?

--- Customer engagement ---

CHRIS

24:14 The pull through work that's being captured out in the field and help quickly that's being captured from the technicians to the office to quote to customer engagement is one of the big flagship workflows that we have in service trade. And I can kind of segue over to that if you want to see what that looks like.

--- Assets ---

CHRIS

24:34 Alright. So, so kind of jumping all over the place. But before we do that, just so you guys can kind of see what a data model looks like. All of the jobs on a specific location page will track right here with a detailed history of everything that's tied back to those specific jobs who did it invoice amounts on all those jobs. The other concept, the other big thing here.

JHARRIS

24:55 Hello?

CHRIS

24:57 Sorry.

14439261676

24:59 Never mind. Alright. Keep going.

CHRIS

25:01 Another big concept here or... or feature that a lot of people like is the asset management side of things and being able to... to tie all the services back to the different pieces of equipment. So tracking all of the PMS out at a strip mall with the 50 different rooftop units you can have there. And then an asset page is going to track all that information, model, number, serial number, warranty parts that we need, right? And I can even track the services that are tied to that specific piece of equipment. Anything that's ever been done on that piece of equipment, deficiencies ever track their quotes associated with that piece of equipment as well.

--- Recurring maintenance ---

CHRIS

25:39 And I can kinda show you what that looks like to create that... on a location page will also track the deficiencies quotes, all of your contracts to, right? So we'll know when everything's about to expire, which is going to handle all of your markup rules as well, and then give you guys the capability to run the report of, show me all of my stuff that's about to expire, soon to expire, stuff that's three months out, six months out, and then allow you guys to renew all those contracts.

14439261676

26:08 Is that something that we have to go in and pull or is there a notification system from service trade that tells us what to do or past?

CHRIS

26:18 So you run a report underneath the contracts, right? So you would basically run a report under contracts of show me all my stuff that's exposed to expire from here as opposed to start on a specific end date or show me all this stuff by a specific sales person. So, you know, hey, show me all my stuff that we got review dates for December.

--- Recurring maintenance ends ---

14439261676

26:40 I think the biggest thing I saw that... that would be of interest, I think is... is where you shared the map with all the ones listed. That needs to be kind, have a portal to the PMS that are that do at that time. It looks like.

CHRIS

26:55 So, right on here under jobs is what we call service opportunities.

--- Recurring maintenance ---

CHRIS

26:59 And this is that the PM, let me run a report for all of my PM is that we have this month, right? So I can filter this out by stuff that's overdo this month, next month. This week, we have the concept of different offices, right? So I can break it out by different offices is if need be here's, all of my approved reoccurring one time services.

--- *Type of work* ---

CHRIS

27:18 So I'm doing recurring because these are all my PMS. But if I wanted to do quoted work, a one time service calls or I could do everything, I can filter this out by service lines too. So if I wanted to see boiler work versus H back work versus electrical work, whatever I wanted to do for the different service lines, alarm... alarm, monitoring, whatever that is, right?

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

CHRIS

27:40 You can even associate texts with that. But the point here is I'm just gonna click a couple of these, right? So we can kind of see what that's gonna look like.

CHRIS

27:54 And then I'm gonna come up here and say, hey, these are all going to be my... preventative maintenance work as I scroll down over here on the right?

--- *Pricing* ---

CHRIS

28:02 I'm going to get a quick overview for what it is, 150 bucks for an hour's worth of work, 325 for two hours, right? And then what I'm gonna do or what you were just asking me as I go ahead and create these 11 jobs.

--- *Pricing ends* ---

CHRIS

28:15 And then essentially, what that does is we now for those things up on the map and now let's start to build out some routes that are gonna make sense. So this is gonna give me one more chance to be able too... filter out. Let me turn my video off.

--- *Recurring maintenance* ---

CHRIS

28:32 So she goes a little faster. This will give me one more chance to filter out specifically what I want to see, right? So again, by the offices, I had mentioned the concept of service lines. Obviously, this is a demo account. So you wouldn't have all

of this. But if, you know, it's October and I only want to see my boiler staff or if it's the spring, I gotta get on my spring PM is done.

--- Recurring maintenance ends ---

CHRIS

28:50 You can kind of filter out by H, racy, you can also filter out by, you know, expensive stuff, right? So show me only the stuff a 1,000 dollars and higher, right? But what this essentially is going to do with everything up on a map?

JHARRIS

29:08 Okay.

14439261676

29:10 Yeah, that's what I was... I was looking for.

CHRIS

29:13 Yeah, right here. So just kind of showing you how we get here, right? And now that we have these things up on a map, I can drill down a little bit and we'll just kinda pretend like we're hanging out in Maryland. All of this is Kelly. Okay... right? So I can hide some offices here... and this is a demo account. So it's a little clustered but you can see everything's color coded by technicians. And then all of this is drag and drop as well. So now that I have, it looks like Matt is going to be in Maryland, I can come over here and tell me to get over jersey as well. And now that icon will turn orange, right? And I can kind of come down here and see where mounts got some time and I can drag and drop and say, Matt is going to get there Friday. So now that's on my calendar to get done and you can see you got a calendar icon in there as well. Let's just say we need to technicians on this specific work order. So I can drag and drop broke onto that work order as well. And let's just say that this thing is going to be like a 16 hour job. I can say you guys are going to get there Friday and Saturday.

CHRIS

30:23 And then as you start to build out some technicians schedules, you can then obviously turn them off, right? So I can turn max calendar off and his... his things will start to disappear. And that's kinda throw in all of those things up on a map to be able to schedule and does specialists things out.

--- Invoicing ---

14439261676

30:43 And then how... how do people integrate that information back to Foundation? They do a daily, right? Export or how is that function where group is good?

14439261676

30:55 Process manual or does that happen automatically?

CHRIS

30:58 No, that is, yeah, that is a manual process that at the end of the day, you'll run a report that basically says show me all this, the invoices ready to be sent over?

--- Accounting integrations ---

14439261676

31:09 Yeah.

14439261676

31:10 Yeah. They do this once with Quickbooks and.

CHRIS

31:14 Yeah. So that...

14439261676

31:17 I think the... the integrate.

14439261676

31:19 Side of things, what, what's gonna come over? Like if we use this system and work, it works great. Okay? I know the cost and the revenue is going to come over. But is it gonna populate back into the fields that we had from our previous dispatching tool in Foundation?

--- Accounting integrations ends ---

14439261676

31:40 Not... not to say we would use it as a reference, but this, is that how that the API works or whatever... whatever link you're using?

CHRIS

31:47 Yeah. So no, it's probably not if I'm understanding your question... question correctly?

14439261676

31:55 Yes. So, so if we went to go look to see what was done on a particular contract that a particular site we would go through... probably your portal, that not Foundation because everything's not gonna pull over.

CHRIS

32:10 Correct. Right. Yeah. So, so, so for example, if camden yards was calling you and saying, hey, you guys sent me an invoice for 58 grand. What did you guys do specifically on that job? You... you would just come in here type, camden yards in here and come down here and be like, alright, what did we do here and grab the specifics from that job from...

32:31 Here?

14439261676

32:33 Okay. But from a cost perspective, you know, if... if we ran our... and... and just to be clear, we're... we're using this more of a service base platform, right? We run a job. You said it earlier when we have actual jobs like project management, jobs like that, take a while.

--- *Type of work* ---

14439261676

32:54 Let me run that at a Foundation construction software. The costs are going to be in two different places. Is that correct? So... yeah, for the construction work, it would be in Foundation, but it could be the same customer that service work. So well, we want to overall portfolio of the performance of the customer. Do we have to go to two different places?

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

CHRIS

33:21 You should be able to get that out of foundations? Because I'm gonna kick out your... your costs with all the markup rolls out of service trade to know... what you made on that specific service call?

14439261676

33:35 Got it. But on the other flip side of things, if we were in service trade and the way the customer wanted to know information from project work, because this was also appealing because you said there was a customer portal which I want to see. But if the customer portals being used it and it's only gonna track things that were generated out of service trade, right? In other words, the link doesn't go back and forth.

CHRIS

33:59 Correct.

14439261676

34:01 Okay. So they would not be able to see past project work, just service work?

CHRIS

34:05 Correct. Okay.

--- *Pricing* ---

CHRIS

34:07 Yeah. So there's going to be half there's going to have to be, you know, and I, this is back to a question back to you guys somewhere align where you draw of, you know, hey, projects, 200,000 dollars in more will not live in service trade, 200,000 dollars and less will live in service trade.

--- Type of work ---

CHRIS

34:24 And whatever that is. I have no idea, right? We can figure that out but those big construction projects, I'm not going to be able to go get data and pull. If you're not going to be managed to them in service trade.

14439261676

34:35 No, I get that. I guess... I guess we're look, we're on the fence about having to systems.

--- Type of work ends ---

14439261676

34:40 I don't like it. It's sometimes it doesn't... doesn't go well, but if there's a benefit to it, we're all ears like right now with agenda. For what would you say is our biggest issue? Is it maintenance contracts with Foundation or is it service is a more?

14439261676

34:55 I have a difficult time just because I come from a world where you can, there's automation to the system. You get notifications that... that pop up in your email. It's something fast too. That kind of thing... the... the customer portals is. Sounds like a nice thing that we don't have right now. Being able to see, you know, the PMS and dragging and dropping on people schedule is... is nice to see it all kind of in one screen. But those... those contracts are the biggest thing for me right now just because we're trying to get them... to a state where... we know what's going when, without having to pull a bunch of different reports.

CHRIS

35:48 Yeah. So what two two things there on that Jennifer, right?

--- Dispatch ---

CHRIS

35:53 This is... this is that what I could, what we call the dashboard and this is gonna give you that catch all the, what I call catch up buckets, right? Hey, I can filter this out. How I need to see this based off of my different offices, my different job types, the service lines that I had mentioned before, right? And this is just the dashboard. I can even filter this down by job owners or salespeople. Okay? This is gonna give me a quick overview of where my guys are clocking in and out of jobs, right? So obviously headquarters for us is Raleigh, North Carolina. So I can see everybody clocking in and out. I can get a quick overview of a daily schedule. I can filter this by specific technicians if need to. I can see the... the kind of the green and the check boxes as

things are being completed out in the field and they're getting marked by the technicians. Those things will start to change on the service trade side.

--- *Recurring maintenance* ---

CHRIS

36:43 I'm gonna track everything that is passed to, right? So on the location page, I told you about how we manage all those recurring services with the scheduling window. I'll track that for you and put them in a bucket that I let you know everything that's passed to. I'll even give you everything that's upcoming do in the next two weeks, right?

--- *Dispatch* ---

CHRIS

37:01 So here's everything that we have that's do in the next two weeks. And then the other bucket, the other catch all bucket that we have is the typical workflow for service trade customers is technician out in the field. He does whatever to hit that whatever.

14439261676

37:16 What?

14439261676

37:17 Is it, you just said let's do, how do you trigger?

--- *Recurring maintenance* ---

14439261676

37:20 What's do? Can you go through setting up a job? Like what, how do you... you said? What's do? Like, what... what is the process like in that setting that up? Yeah.

CHRIS

37:29 Yeah. So there's two ways that we can do that based off of recurring services, right? So all of my PMS as to when they're do, right? I'll just edit this one so you can see what that looks like, right? I can tell you.

14439261676

37:43 Yeah, right. We were talking about.

14439261676

37:46 Yeah. So you said... you said that when it's do, how often it does and.

14439261676

37:51 This is just maintenance. It's not no other jobs are being tracked as anything that's do, right? I mean.

14439261676

37:59 What we put in whether it's a job or a PM is done the same way with the next due date and everything, correct?

CHRIS

38:06 Yeah. I mean, there's several ways that you can do that inside of service trade? Yes, this is one, this specific view of how do you, how do you know when my PMS or do here's how I know when your PMS?

14439261676

38:20 And does that populate automatically to the screen that you're showing us before or is this something we have to do to get it to show there?

--- Accounting ---

CHRIS

38:27 No.

14439261676

38:28 Medically?

14439261676

38:30 So, do you have to put it into Foundation here? Yeah.

14439261676

38:33 Foundation, if it's in Foundation, you can export that to.

CHRIS

38:37 Correct.

14439261676

38:38 Right, right.

CHRIS

38:39 Correct. Yes.

14439261676

38:43 Just to be clear, if we go in, we set up a job, perfectly, setup and Foundation, all the fields filled out. This is going to mirror exactly what Foundation?

14439261676

38:53 We just have to manually I support is my understanding, correct?

CHRIS

38:57 Yes.

14439261676

38:59 Yeah. How does it know what to export by?

CHRIS

39:07 Yeah. So, so we have the concept of where is it bulk imports, right? So we can export that into an excel or a CSV file out of foundations and bulk import those things into service trade.

--- Recurring maintenance ---

14439261676

39:26 What, what I'm saying is if you're doing this on a recurring basis, you have to set the dates of new jobs, how does it know which information Nicole?

CHRIS

39:38 Once we, once that... once that information gets into service trade has done, you don't have to do that on a recurring basis.

--- Accounting ---

14439261676

39:44 But...

14439261676

39:45 When we add a new job or a new... new contract for PM... we add it to service straighter, we add it to Foundation and then export the information.

CHRIS

39:56 You would probably add that the service trade.

14439261676

40:01 And if you added to service trade, have you feed it back to Foundation... through?

CHRIS

40:07 What we would consider an external ID. I don't know if you would track contracts in foundations anymore, contracts, we'd be tracked and service trade... and

we just hit foundations with your costs and your revenue.

14439261676

40:22 Yeah, that's kinda what I thought too. So, so basically, we would use this as our... our platform for all service and all maintenance. And then the, I guess the good, quite the best question here I think is once we set up a new customer and service trade, how does that information go back to Foundation to hit all the fields necessary because it could be a customer could be a site.

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

14439261676

40:46 It could be all these little details. I understand the costs and revenue is going to be there, but how does it link or does it link will link from a... from a customer name or above? Once... once... once this is setup, you would live in and out new and old from.

--- Accounting ---

CHRIS

41:04 Yeah. So I think that I think the question is... hopefully, I'm understanding the question, right? New customer, somebody picks up the phone and calls and we have no idea who this is. A new customer is going to be a point of double data entry, where you have to enter that into Foundation and service trade.

14439261676

41:24 That's a double data entry.

CHRIS

41:25 That would be a point of double data entry, correct? I'll verify, but I'm fairly certain that's a point of double data.

14439261676

41:34 And it has to be like exact, you can't have a space or a comma or a dot or anything. It's very... very particular.

CHRIS

41:42 Yes. And I believe foundations has the concept of a numbering system. If I'm not mistaken that you can take a, you know, whatever their unique ID numbers and foundations instead of the same computer. Is it'll say foundations and you sync up that unique ID right here so that we know whatever we need to push out of camden yards, we'll go over to camden yards and Foundation.

--- Accounting ends ---

14439261676

42:04 It changes the process. When at any time a new customer comes in there's, some, we used to have one person that did it because you can really mess things.

14439261676

42:12 Yeah. You know, I have to be exact.

CHRIS

42:16 Yeah. I... I would agree with that statement that things can get very ugly if you have a lot of people saying avenue, then somebody does have and then somebody does add with a period, does out with an exclamation point.

14439261676

42:31 So, how did you... I didn't stop that from happening because that's very realistic.

14439261676

42:38 One person do it.

14439261676

42:40 To do it simultaneously?

14439261676

42:42 The, the process would be new customer. They're not in the system. One one person or a group of people have access to add that like that's a permission and then... and then hit the integrate button and then watch it shows over there.

--- Invoicing ---

14439261676

42:56 And now it lives and all the data goes back and forth.

14439261676

43:00 I guess my point, eight people make mistakes.

14439261676

43:03 It has to be the same process the same time.

14439261676

43:07 Yeah. Well, so, so correct me if I'm wrong, you could do at one time and Foundation then send it over to service trade, right?

--- Invoicing ends ---

CHRIS

43:13 Yeah. So to two things, we have the concept of roles and permissions. So what that means is there's only going to be a handful of folks that can go create new customers inside of service trade. So to stop that from everybody thought I'm willy nilly, it's service trade.

--- Accounting ---

CHRIS

43:31 They can't do that. So we will kind of allow you guys to build out your roles and each roles you guys can dictate which permissions each role has. So we don't have everybody creating specific locations inside service trade. The other side of that is if for whatever reason, we need to send data over into foundations and we have no location to where that has to go in foundations. We will flag that in service trade and let you know, hey 56 or 57 records went through. This. One record did not go through a Y and we'll let you know that for whatever reason, it didn't sync up or something happened or somebody change something, what, whatever that needs to happen from that standpoint.

14439261676

44:11 But when you're entering a new customer, you have to enter it manually in both locations, correct? And what happens when we have a customer with a billing... one billing that has several sites on her?

CHRIS

44:31 We just need to make sure that the external ID'S are sinked up.

14439261676

44:39 Because it would have, they don't have the same customer number, and then a different site?

--- Accounting integrations ---

14439261676

44:46 We have sites and are you familiar with Foundation enough to know the... the... the hierarchy with your customers and your sites and all that? And I guess that's the concern here. Look, we're spending a lot of time talking about the integration part of it. Yeah. And I think that as you can tell that's a big sticking point here with everything... I don't and just... just be straight up if you don't have a lot of experience with Foundation. I noticed it wasn't even on the via Jonas and a couple of other ones. Are you telling me it's all the same? Is there one that service trade favors more than others to as far as synchronization?

--- Accounting integrations ends ---

14439261676

45:30 That is our, that is our, that's the... the main topic here. So we don't want to get into something. If... if... if we're if it's not made for this, you know, we don't want to be.

CHRIS

45:42 So, there's... there's two hard parts there it though. Do we favor and accounting system over one of the other?

--- Accounting integrations ---

CHRIS

45:49 No, we don't really have a favorite except for we always prefer something has open API because it's significantly easier to talk to a platform with open API. Foundations does not have open API. So it makes it more difficult to talk to.

14439261676

46:05 Yeah. I think that's the answer right there.

CHRIS

46:08 That's yeah.

14439261676

46:10 Fresh and iPad had about service trade is that you mentioned partnership and I asked the... the... the rep before I said look, is it, what do you mean? Is this a preferred, you know, a software that... integrates very well? I'm just like, yeah, yeah, yeah. And... and it sounds like it's not like a preferred software. It's a competitor just like every other one and an open API. Unless it's there, it's not going to be, I'll use the term. See.

CHRIS

46:44 No. I... I said that in the beginning a seamless integration with foundations. No, that's not what we do... do. We have enough talking points that people are using service trade and foundations. Yes. And I think the other... the other point there that... you know, I was trying to make is... hey, there's no point in having the integration conversation. If I can't show you what service trade. Does that make sense? It doesn't make sense, right? But none of this makes sense. But we also can have an integration conversation until there's an understanding of what service trade does. So we know what will live, where, right? So kind of hard to have the integration conversation piece first if there's not an understanding what service trade is and service trade does... right? And that's kind of where, hey, you know, do we have enough talking points? Is there... is there communication with Foundation? Yup. I mean, my sales guy was just in... in foundations office meeting with the cro and the CEO. They'd be happy to take a call. If you guys have any specific questions about foundations and our relationship with us and what we're doing with foundations. And maybe that's where we start... right? Where you guys can pick up the phone, call them and have a conversation with them and say, hey, should we be looking at service trade, or should we not? And now they'll tell you the honest truth because the reality of the situation is... is we are taking revenue off of foundations if they were to migrate off of the service platform... right? So.

--- Purchase decision ---

48:09 So it makes a lotta sense. Makes a lotta sense. That could be a good... good starting point. You mentioned... you mentioned no, just... just real high level. We don't have to go through the whole demo because that will be the first... step in our... in our behalf. But what... what stands out, what stands out with service trade?

--- Purchase decision ends ---

14439261676

48:29 And we had asked that before and I think you... you said it was... the... the... the pull through work type of revenue tracking, what else? And then you went right there, which... which was kinda cool. But what else is there that sales?

--- Type of work ---

14439261676

48:43 Okay? Because we've... we've looked at, I looked at service tighten. We've looked at BuildOps. We've looked at some other things but we don't wanna work where at the fear of losing the... the Foundation side of things just because it's got it. We're kind of already get off at what was, what... what does the bread and butter here?

CHRIS

49:01 Yeah. So service tightened is great for the residential side of things. They do a fantastic job of the first time I'm in your driveway might be the last time on your driveway. So I need to maximize the amount of revenue that I have to get out of miss Jones. That's what service tightened does, right? At what?

--- Type of work ends ---

14439261676

49:18 We're commercial. So that wasn't appealing to us.

CHRIS

49:20 Yeah. What we do great at is managing how many times you guys are in a building, the frequency that you're in that building, and then being able to show the customer what you guys are doing without the normal daily interaction, right?

--- Deficiencies ---

CHRIS

49:35 Because they probably aren't following you guys up on a rooftop unit to watch you do the PM. So how can you show them that? And then capturing the other side of that is capturing the deficiency. So we... we haven't even gotten there yet, but the I'm here to do a PM and this compressors making seriously bad noises.

--- Deficiencies ends ---

CHRIS

49:54 Let me quote this thing out with pictures and videos and get that back to the office to get a quote out to the customer... that's what we do very... very well. I would ask you guys what you saw about BuildOps and what was intriguing there. They... they just started popping up on the radar... for me? What... what was intriguing there?

14439261676

50:20 So, the honest answer is I don't remember it was a long first like six months ago, but ServiceTitan was more fresh. And then what... what popped out there was more of the customer experience. You know, there are the... the interaction that... that the customer has the... the... yeah, just... just that communication line and you're... you're... you're hitting the striking inner here because you got that, right?

--- Type of work ---

14439261676

50:49 Yeah, we don't do, the customer doesn't know what we do all day every day. Yes, in a commercial landscape, but much less than a residential, which we don't really, we don't do any residential.

--- Type of work ends ---

14439261676

51:02 So this is just seems like a little more fluid for what we need. So, I'm interested to see how the customer, I'm it all goes back to the customer. For me. When do you, when do you want to show me what is the customer see? Then? That's what I want to know. Of course, we want the system to be easy, but we want the customer had the best experience. How does this maximize that?

CHRIS

51:28 Yeah. So let's get into that. Let's just do that real quick. So you... you broke up. So I apologize if... I did not completely hear you. All I heard is... is you struck a nerve and then you guys went... went silent.

--- Dispatch ---

14439261676

51:43 I had a stroke.

CHRIS

51:48 So, hey, let's just make a service call real quick. I got you now.

14439261676

51:55 Gotta be on his.

CHRIS

51:57 Hello. Yeah. Now, it's... it's my end. Can you guys hear me?

14439261676

52:03 Yeah, I hear ya.

14439261676

52:05 Yeah.

CHRIS

52:07 I just got the internet connection unstable. So let's just create a service call real quick so we can kind of go through this and show you what the customer engagement side of things looks like.

--- Tech On-site ---

CHRIS

52:20 You know, hey, no, the service call out Camden yards, right? Let's throw Chris Kidd well up there. That's automatically gonna populate on the Chris kickball schedule. I think I'm down here in... Jake, his office. Yeah. So there's my Camden yards job, right? So let me pull up my... phone, hang on a second.

--- Access to information ---

CHRIS

52:48 So here's what the technician they're gonna see that we try to move it to the side... right? So here's the mobile app and I'm going to get to the customer engagement side in one second, just bear with me a little bit, but I can see all the stuff that I'm supposed to do.

--- Dispatch ---

CHRIS

53:02 I can see any unscheduled or completed jobs, right? I can see all the stuff up on a map if need be, right? So there's all this stuff up on a map. Okay? I'm gonna filter this by today. Here's. My Camden yards service call. So I'm gonna come in here down here at the bottom.

--- Tech On-site ---

CHRIS

53:20 I have three clock features, job prep in route, right? So I can go ahead and notify the customer. And Jake, I have you on here says I'm going to be there at three 31. There's an email notification that you'll get on your.

14439261676

53:35 No.

CHRIS

53:36 Going to get that now?

14439261676

53:38 Awesome. Got it. Yeah.

CHRIS

53:40 That's that's Chris kids well on as well?

14439261676

53:42 Hello? Alright. I like it so far. It's good who's aardvark by the way?

CHRIS

53:47 Pardon. Aardvark is the... the mechanical contracting company that we're pretending to be today?

14439261676

53:53 Okay.

CHRIS

53:55 So we're gonna clock out. We're onsite... finished crap.

--- Tech On-site ends ---

CHRIS

53:59 No don't... don't want to do that. Alright? So now we are on site, we're here on this camden yards. They're saying no, he go and fit fix not to exceed 750 dollars. Okay. Comments, right? So I can associate any comments with this, right? Where I can say, you know, hey customers.

--- Deficiencies ---

CHRIS

54:18 All happy. I'm all done here. I can make that visible to everybody or I can keep that internal... next button down here as attachments. This is where I can start taking all my pictures and videos and photos of whatever it is that I'm supposed to be working on, right?

--- Tech On-site ---

CHRIS

54:38 So here's my before and after picture, whatever that needs to be. I can associate some verbiage with that if need be, right? Contact, it's pretty self explanatory will track all the contacts out on site. My paperwork, this is where my install checklist or PM checklist would live. The next thing I'm gonna come down here is add some job items.

--- Tech time tracking ---

CHRIS

54:58 And this is where I'm just gonna build out what we call jobs, work orders, tickets. Let's say... say I got some labor here. Alright? Let's say we got eight hours, seven hours. Whatever that is cost is blocked out because we don't want the technician to know that, but let's just say he comes in here and screw something up. And I'll show you why because we can fix that in the back office and then we'll source that to... to the tech because I know Chris kit will burn rate is different than Danny, which is different than Johnny's associated with that service. And there's just me adding some labor.

--- Deficiencies ---

CHRIS

55:30 Just come in here. Grab a widget real quick. So we have to use the widget... you know, we use three of them. Let's add a widget, put it on that service.

14439261676

55:42 Wow.

CHRIS

55:44 Next thing that I'm gonna do is I'm gonna come up to this tile and added efficiency and this is where I'm going to say, hey, it looks like they got a broken compressor... you know, are leaking compress or whatever it is. Let's go ahead and added some attachments. You know, this is the... the blue compressor. Go ahead so I can do video. I'll just do another picture. Okay? And... and I can do audio here too. So, hey, this audio memos for the office.

--- Parts management (inventory) ---

CHRIS

56:20 I'm going to need a helper. We're going to get 20 foot latter and it's gonna take me and Johnny about eight hours to swap this thing out. Probably gonna need a jug refrigerant to.

14439261676

56:32 My God... transmitting when you said to text or it just seems that the recording?

--- Deficiencies ---

CHRIS

56:42 That, that's just a specific audio memo. I can do a talk to text if I wanted to. Though. Okay, I'm gonna click next. Hey, I'm gonna say that this thing is deficient because it's still getting by... but it needs to be fixed. That needs to be addressed. The status of this, we're going to call this new. I am going to make this visible to the customer... and the proposed solution. Hey, I... I would fix that, except.

14439261676

57:10 I missed that last part. How do you know whether you want to make it visible or not to the customer? Was it a button? Okay... okay. Got it.

--- *Deficiencies ends* ---

14439261676

57:23 So, so hold on. If we made it invisible to the customer, how do we point? How do you set up? Where of the information goes? Is it going to the platform in the office? Can you haven't had an account manager? Can you have it go to different places? A different format email? Or just as I hit the system?

CHRIS

57:42 Correct all of the above. Okay? So we have folks that?

DANIEL

57:48 Did...

14439261676

57:49 You go ahead and make it an email sent me? This is, I'm in the system, I want to see that report in an email or are you getting there?

CHRIS

57:56 I'm getting there, got, I'm getting there. So bear with me one second.

--- *Deficiencies* ---

CHRIS

58:01 I can kinda show you what that looks like. So that's me capturing that efficiency, right? So, for argument's sake, I'm gonna say, hey, we came in here. We pump this thing with some refrigerant, I got it running, but you need to get this thing fixed. So, the next step that our customers typically do is they get a work acknowledgement.

--- *Deficiencies ends* ---

CHRIS

58:20 Okay? And this is where I can just come in here and say, hey, Jake, you're going to be the customer on site? I was out here to do this. I got eight hours of labor and I

had to use a widget to get you up and running. Hey, this deficiency is here.

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

CHRIS

58:32 You're... you're probably gonna see a quote for this in a second. If you haven't already? Okay? We're going to review this. The customer is going to go ahead and confirm and sign, Jake, I'm going to send you a copy just so you can see what this looks like.

--- Tech On-site ---

CHRIS

58:46 Most of our customers do not do this. They wait until the office can clean it up. But just so you are bringing up the point of that customer engagement... you can go ahead and send that. And then the technician. Now, it's going to go ahead and clock out and say, hey, I'm done. I'm on my way to my next job. Am I done with those visit? Yeah, I'm finished clocking out now on my way to the capital one arena. And I'm in route and I'm calling from.

14439261676

59:18 If the technician doesn't have service self-service Bill, portable building or something. Cancel this, go through. How does that work? You talk me through that?

--- Access to information ---

CHRIS

59:30 They have to clock in with, they signal. Once they clock in with the signal, everything is cached on the application and they can go down to the boiler room or whatever the basement and do everything that they need, take all the pictures and everything else. And then as soon as they come up and catch a signal, will push everything up to the cloud.

14439261676

59:49 So, so everything in the actual work, no problem without signal.

CHRIS

59:55 Everything natively in the app. So all of my services, commerce deficiencies, I can add as many pictures as I want and everything is cached and nothing will get lost. And then as soon as I come up out of the basement and my... my cell phone catches a signal, it'll push to the cloud.

14439261676

1:00:12 Okay?

14439261676

1:00:18 The same on... on android versus I iPhone.

CHRIS

1:00:22 Compatible with any android or iOS device.

14439261676

1:00:26 Pretty much.

CHRIS

1:00:30 Yes. So, you know, there are different, there are different iOS is, so they require some different coding, but the... the visual technician experiences the same.

14439261676

1:00:41 So, what...

14439261676

1:00:41 You just said is that with the...

CHRIS

1:00:44 Correct. If you were to send that?

14439261676

1:00:48 If the recent version or if we wanted to have?

JHARRIS

1:00:51 Version for the?

14439261676

1:00:52 Customer to version for the office?

CHRIS

1:00:55 Yeah. So we're... you got work acknowledgement. So, yes, the... the... the next version is what we call the service line, which is just a little bit cleaner, which I'm gonna show you right here because back in the office based off of our dispatch board, we're now going to see that this thing is done.

--- Dispatch ---

CHRIS

1:01:13 Chris, check this off. We got a check box here, right? So we know Chris has completed this job. If you remember on this dashboard, that bucket from up top that now this job now would be moved to the... what we call the past jobs to be mark completed, right?

--- Dispatch ends ---

CHRIS

1:01:29 And what this job is, now we are on the service call, the office is gonna come in here and say, okay, what did Chris do to this? Is interesting? Why did they use a widget? It looks like he screwed up that price that should have been 100 dollars, not 780. I don't know what Chris is doing. So I can fix that. Okay?

--- ST app contracts and pricing ---

14439261676

1:01:47 Hello? Hello. How did you know that though?

CHRIS

1:01:51 There was a yellow icon right there.

14439261676

1:01:55 Can, you know, continue?

14439261676

1:01:58 Yeah.

CHRIS

1:01:59 Say this customer supposed to get a trip charge. I don't know why he didn't get a trip charge will throw trip charge on there and he's supposed to default to the calling pros, markup rules.

--- Tech On-site ---

CHRIS

1:02:10 So that looks good. So we can save that as I keep going down. We're going to track all the clock events. So, I'll flag that Chris clocked in 35 Miles away. So, we know when guys are clocking in and out, when they're not on site... here's, the piece of equipment that he was supposed to be working on.

--- Tech On-site ends ---

CHRIS

1:02:29 And as well as just efficiency was just notified, right? And so you can set this up to, so that the office will get notifications of all of these deficiencies. So.

14439261676

1:02:40 Hello?

CHRIS

1:02:40 I'm...

14439261676

1:02:42 Chris?

14439261676

1:02:42 Show me it's like, I get. This... this is nice. I know there's a lot of until we get familiarized with the software, no offence, they look the same, you know, all my, a lot of them do give... give me a big picture view that I want to. Once you start there, give me something that I'm... I'm big upper management. Give me a big picture view of what... the... the... the performance of the service side of the business is doing from a output of calls to incomplete job is to on captured revenue. Can you show me that?

--- *Type of work* ---

CHRIS

1:03:18 So where do you want to up performance of how the businesses doing?

14439261676

1:03:22 Yeah, real quick. So the service, I remember we're only using this for service Foundation would be doing project work. So everything that this is capturing from maintenance contracts to service work. How do you segment those on a performance oversight?

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

CHRIS

1:03:39 Yeah. So you want... you want to see like the... here. So this is a... a quick... quick site is what the answer. I think what you're asking me?

14439261676

1:03:48 Just...

14439261676

1:03:48 Do you have to go to a different site to get this?

CHRIS

1:03:51 This is, so we... we use Aws to host our application. Aws is BI tool is quick site, business intelligence, right? Some folks use Domo, some people use... bless there's a bunch of them out there now. But Amazon, Amazon's BI tool is quick site and that's what we use. So we take all the data, pump it into a Redshift data warehouse and then kick it out into... does it... does it do that automatically? Yeah. What do you mean?

--- Implementation and ongoing support ends ---

14439261676

1:04:25 Like you just said you do it, is that we wouldn't have to do it, right? This links automatically with service trade.

CHRIS

1:04:33 Yeah. So you have to build out some other reports. But once they're built out there, automate, like this dashboard is always here so you can come in here and see... see this specific dashboard whenever you want and all of this data is automatically update.

--- Quote templates ---

14439261676

1:04:47 Okay.

14439261676

1:04:49 I like pretty colors and pie charts. I just trying to, this is customized. So it's not built into your system. No. So we created this based upon what you want it.

CHRIS

1:05:01 So both, we have... what, what's the right word I'm looking for, we have some pre-built templates already.

--- ST app contracts and pricing ---

CHRIS

1:05:09 And then if you want one offs, we can build one offs. So if there's a specific KPI that you have that you want to see, we can build that through quick site and this is where you can track revenue by month by the different job types, right? My revenue by my different work order type.

--- Dispatch ---

14439261676

1:05:29 Okay. So this is all costs associated. I'm talking... I'm talking more about performance and not just from a cost perspective, but from incomplete jobs, volume of calls.

14439261676

1:05:44 How many service request we ran?

14439261676

1:05:46 How many incomplete PMS that are left over? Like what... what do you have here that show that? Is that, that's probably report in here?

CHRIS

1:05:54 Yeah. I mean, so there's a couple of different ways to me. So you're... you're asking me a few different things I think that you wanna see. So you're saying, you know, just incomplete jobs. When you say incomplete jobs, just something that you guys didn't get to.

14439261676

1:06:09 I could complete. I'm sorry.

--- Dispatch ends ---

14439261676

1:06:10 I still didn't complete and complete. So boots on the ground, we build a tech, got paid but we didn't build customer. I need it any day.

14439261676

1:06:20 Really? Maybe let me ask a different question, Jake. I think we do that, is... is there and expect you this dashboard in this tool that shows you everything you need to know, been in management?

14439261676

1:06:31 Make sure good stuff that they're doing their job.

14439261676

1:06:34 Let's see different views. But, yeah, I'm with you like definitely from a, yeah. So to that point, what is your, what is the overall dashboard for performance from a financial perspective? And to your point like a, an operations perspective? Like what... what did we do? Where does the dialers translate to volume, even business? And... that's kind of what I wanted to see. You had it up there, but that was just all financial or maybe I wasn't patient. I did wait to see all of it... but it looked like it was just cost in revenue.

--- ST app contracts and pricing ---

CHRIS

1:07:10 Yeah. So, I mean, you're... you're I don't know how do we say you're what you're specifically trying to ask me in terms of the, you know, C level dashboard, but.

14439261676

1:07:23 Revenue margin. Yeah. So, so like, okay, so cost here and I'll look at it like what... does it break out?

--- Quoting ---

14439261676

1:07:33 Cost by customer cost by, you know, type of prepare or... or maintenance contracts? It's like it does break it down. Okay? And then unquoted submitted, rejected that's good. Dissecting this, Chris. Sorry, I'm asking questions. I haven't really seen this.

CHRIS

1:07:57 Yeah. I mean, the big question.

14439261676

1:07:59 You can pretty much create any... any report that if we need to see something specific, you could create that report and it.

--- Quoting ends ---

CHRIS

1:08:05 Yeah, yeah. Yeah. I mean the... the... the bigger question there is... is what are you, what are you guys currently do? What are you trying to see... right? Because if there's a data point service trade, we can get it out and put it into a chart. Question is... is, what... what do you need to see when he's you kept going back to performance defined performance, right?

--- Accounting ---

CHRIS

1:08:27 Like what... what does that mean when you say performance?

14439261676

1:08:31 It was like it's customizable right now Foundation. Has we pull the data out through like a sequel query or something like that? It just translates it to... to a excel S file essentially, but we have all the data points that we want. I just got finished with a couple of today actually and it comes out on a nice clean but it's just an excel document. I'm sure that can be transferred to something like this which I'm working on.

--- Dispatch ---

14439261676

1:09:01 But... when I say performance, I mean it could be any like what, how many new jobs came in today? I mean new work orders were created like let's look at that on the graph and that's just one though part of this whole dashboard. Next one could be how many jobs were built for service today?

--- Dispatch ends ---

1:09:21 That's another graph on the dashboard and we can click back and forth from, you know, this time last year to current quarter, our current day, you know, that's all we want to be able to play with the... the parameters and... and look at the performance from not just a cost and revenue but volume.

CHRIS

1:09:41 Yeah. So two things there to your point, we can take all a lot of these reports and we can dump a lot of this information out into a spreadsheet, right? So I can take all my jobs and job items with on schedule appointments and stuff mountain to a spreadsheet. I'm probably gonna take forever because there's 8,000.

14439261676

1:10:00 Well, that's just it. I mean, do you do that we can do that? I'll tell you we don't know how to do that and we probably will never learned to do. Okay. That's the thing I'm asking is any of this automated?

CHRIS

1:10:13 So in terms of, so there's two in terms of automation quick site is your automated report.

--- Quoting ---

CHRIS

1:10:20 I want to see all of my revenue by month by job types. So here's, this is by that specific month and you can drill down on these things as well, right? So you can start to see this and specifically see my revenue by months, right? And this is just to anonymize data but you can then filter that out.

--- Accounting ---

14439261676

1:10:44 You know?

CHRIS

1:10:45 Year over year, quarter over quarter, month over month that's the automated part. The non automated part is this view here. I'll show me all the stuff that we did, you know, January of this year. And then I can dump that into a spreadsheet, and then have to dump that into another spreadsheet to get January of 2021 and overlay those two spreadsheets and run a pivot table that's the non automated version of that... right? So I can jump dump all this to a spreadsheet, all my jobs and job items... and I'll just pull up this so you can kind of get an example real quick. But that's the non automated version of that. And then the automated version or the... the sexy side of that is quick site which is Amazon's BI tool of I just want all my reports automated on the dashboard... right?

--- ST app contracts and pricing ---

CHRIS

1:11:36 So I can dump all this into a spreadsheet and get my estimated price cost, total invoice... total invoice, sub total. And then you can run whatever pivot table do you want to on a spreadsheet?

14439261676

1:11:51 Who does that?

14439261676

1:11:53 That was your selling point when we interview. This is, you said you knew how to do those?

--- Accounting ---

CHRIS

1:12:02 I mean that's just spreadsheets... spreadsheets and pivot tables, right? You guys can do that. You can dump that into a spreadsheet and pivot table and be on your way. And a lot of folks do that. There's... there's some people that don't want that and they want this dashboard.

--- Accounting ends ---

CHRIS

1:12:17 And then there's some people that pay us to do these things for them as well. Have on a monthly basis. I have a new set of KPI'S that I want to see service trade. Go build me these reports.

14439261676

1:12:32 So help me understand that. So I can send, you want to report the cost, how much?

--- Pricing ---

CHRIS

1:12:40 Yeah. So great question. I don't have an answer for you on this specifically, what that would cost?

14439261676

1:12:46 What's your, annually, right?

CHRIS

1:12:49 Hourly rate is 175 dollars now.

14439261676

1:12:54 And we're... we're on average running like two or three hours of support.

14439261676

1:13:02 He probably have what you want to set up initially and run those reports. And then you come across another.

--- Accounting ---

14439261676

1:13:08 Once it's set up. Once it's set up, it's... it's you'll... you'll give us this dashboard and we have to do any, we don't have to do any linking or exporting anymore, correct?

CHRIS

1:13:19 Correct. Once it's set up, it's done... right? So once it's done... it's done, we... we don't touch this and then this thing just automatically updates with the data. You're... you're cranking out in service trade.

--- Implementation and ongoing support ---

14439261676

1:13:31 Okay. So we're using service trade. We've got our KPI'S Bill. We have all our dashboards and the reason why I want different one just because Jennifer's dashboard, maybe different view than my dashboard, you know, and... and her team may have to have a different dashboard but we want to be able to quickly sift between those and give it to get rights to certain dashboards and access and things like that.

--- Accounting integrations ---

14439261676

1:13:57 And... and then ultimately back to the... the question we've been asking for... for some time is that... all that data stays in service trade. The only thing that goes over to the accounting system. So, this case Foundation is cost and revenue that's it.

CHRIS

1:14:14 Yes.

14439261676

1:14:17 It's all web based, correct?

--- Accounting integrations ends ---

CHRIS

1:14:19 We are all web based, yeah.

14439261676

1:14:22 Dressing you out, man. Sorry.

CHRIS

1:14:26 These are all good questions.

14439261676

1:14:29 Okay.

CHRIS

1:14:30 They're all good questions. You know? I mean, I think the reality of the, my question kind of back to you guys is like, hey, do I need to get our, we have an in house CFO from the... the accounting side of things?

--- Accounting integrations ---

CHRIS

1:14:44 Does it make sense to get her on the phone and have a little bit more of an in depth conversation? Probably takes about 15 to 20 minutes of specifically how this works with foundations?

14439261676

1:14:57 That, that's not the Foundation person that's on your side, right?

--- Accounting integrations ends ---

CHRIS

1:15:01 Correct.

14439261676

1:15:05 Yeah, I... I think... I think are like I said, the first question I have is, and that's worked with the selling... selling point of even have this meeting was ever somehow a link, you know, there was a relationship between Foundation and service trade and it was Mutual. It was... it was not competitive that's... that's pretty nice and appealing. If that's true, and he said something along those lines of that kind of is true Steven?

CHRIS

1:15:35 Until is the cro of foundations we'd be happy to take a phone call but you can have that conversation with them.

14439261676

1:15:44 So, help me understand what would we get out of that phone call? I think you said earlier, there are close network they don't have. They don't have open API. So.

CHRIS

1:15:56 So, you can hear it from the horse's mouth?

14439261676

1:16:01 Yeah. I just wondered.

14439261676

1:16:02 When they open it up, is your question? Like if... if it was a, it was a good, if they were trying to work together when they say, okay, we're gonna... we're gonna exclusively work with service trade to help get data over or does that again, it's Albertus point. What is the point of the call then? Is it bad just to say, yeah they're... yeah, they're a competitor exactly. We don't... we don't know, but our... our API with them. Yeah, I don't know. Is that, what... what would be the benefit of that?

CHRIS

1:16:31 Yeah. I mean, so, so you're not hearing it from me that says we're partners, let them let foundations elaborate on it. I mean, I don't really... have a dog and that fight, I don't care. I would say.

14439261676

1:16:43 No, I... I get it. I get what you're saying. I... I just don't like him to waste my time. That's why I'm asking like what... what would we get out of the conversation? And I guess my point to my questions, you may have more pointed if they have a close, if they don't have open API where you can integrate with them, what are you partners on? How does the partnership bring better technology to customers?

CHRIS

1:17:09 Yeah. So, I mean, I think that's the concept of, hey, we... we create the argument that today's solutions is multitenant solution, right? You... you pick up your phone, you have multiple applications on your phone to... to do what it is that you need to do. We believe that's how you guys should be running your business as well with multiple applications. And.

14439261676

1:17:29 Hello? Yes, my... my... my... my, sorry for interrupting. I guess that's... that's a good explanation. I guess my struggle with that is I'll pick up the phone call. They had a service tighten our head of BuildOps, et cetera. And the answer is different all in one tool, not 20 different apps. So, I'm trying to understand like what is the value proposition of them?

--- Accounting integrations ---

CHRIS

1:17:49 How, how was... how was BuildOps or service tightened? Going to sit back and tell you that they're an all in one solution. They don't do any accounting.

1:17:57 They don't do what?

CHRIS

1:17:58 They don't do accounting?

14439261676

1:18:00 No, but they have API is with Sage intacct. So it's all done behind the scenes. So the end user never gets in fact, that with any of this.

CHRIS

1:18:07 I mean, we have a full integration with Sage intacct.

14439261676

1:18:12 But now, with Foundation which hosts the other half of the business, correct? We.

CHRIS

1:18:18 Yeah... yeah. I so so kind of go back to your question of this concept of all in one and I put air quotes there because BuildOps is saying all in one, it's like they don't... they don't do any accounting. Why did, how can they preach all in one? And they don't do accounting service? Tightened, doesn't do any accounting that's why they partner with accounting systems. Wow, how did they know?

14439261676

1:18:42 That's true. You're getting overdo frustrated. I don't like that would be quite Frank. What I'm trying to understand is we're looking at operating software, not accounting software, right? So you have a... a service part of your business, PM part of your business. You have a construction part of your business that takes an input from the text from the office on the customer pictures descriptions, etcetera, rolls up costs to all those create invoices, allows you to create quotes, so on and so forth that's all operating software, which I think there are folks that do that in one module, well, one one tool. And then the accounting output of that. If you want to do financial, closing, the books, et cetera. Most everyone, like do you guys have a stage Intacct integration, which is like Sage intacct is arguably the leading accounting solution, but... but that's all like essentially stripping out all the information that comes out of the operating system to generate a financial report. You don't make any changes in Sage intacct, you don't post journal entries, unless there's errors, right? The operating system creates all those things that's what I'm trying to understand. So, in a world where a company like us looked at a solution like the one he presented us, we would have one module for projects which would be Foundation, one module for service. They don't talk to each other. And then obviously the... the accounting integration, is that... is that correct?

CHRIS

1:20:15 So, so you're yeah, I...

1:20:17 Leave what?

CHRIS

1:20:18 You're asking me is you should have an application for your construction side of the business, you should have an application for your service side of the business and you should have something to reconcile. Both be in the ERP.

14439261676

1:20:31 No, no. I'm asking is if your model is to go to the different app module, which okay, that works that's one path forward. You don't have a real line of integrations with the other apps, is what I'm saying, correct? So, you don't have an integration to Foundation for example.

CHRIS

1:20:49 So, in terms of integrations with other apps, we have all sorts of integrations with other apps, integration with pro core. For example, a zoo got Hubspot, pipe drive, Salesforce integrations.

--- Accounting ---

CHRIS

1:21:03 You know, we... we integrate with all sorts of different things in terms of integrating with foundations. We have basically the integration concept, the bulk imports, exports through Foundation. So, you know, end of the day, you run a report of all my invoices complete and service trade ready to be sent over to foundations and we kick that report out and you push that into Foundation.

--- Accounting integrations ---

14439261676

1:21:27 So, so this manager, so I only cost or revenue?

14439261676

1:21:32 Right? My understanding though from what I was saying is with the others that Sage intacct... integration if you will, it's not... it's not manual, right? If it happens... it happens here happens there, it's not a push. It's maybe that's the seamless work. It's seamless.

14439261676

1:21:53 Sound data is looking at making it more automated at simple.

CHRIS

1:22:00 Yeah. No, I... I mean, that's the foundations question... you know, in terms of the like the Intacct, we have... we have two ways things within tack right? Where, but

the seamless integration with Intacct, and we have.

14439261676

1:22:15 Yeah.

--- Accounting integrations ends ---

14439261676

1:22:16 That makes sense.

14439261676

1:22:17 Because we're on Foundation if this might be something.

14439261676

1:22:20 Right. Good luck. Okay. Bye.

14439261676

1:22:23 I tell ya, Chris, I liked, I really liked the report that you got and how easy that was even have your... your... your voice on here for knowing how to change the compressor, getting a juggle refrigerants that that's nice. Really, it's not really quick. So now that we see the value of what I can do if there's anything else, you know, let me know that... that... that was... that was really neat. What else do you have that you want to go through to... to cap this off?

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

CHRIS

1:22:53 Yeah. So let's... let's let me just send this to you and then we'll wrap this conversation up. So just so you can see what a quote looks like, Jake, I will get this to you, right? And you can see my pictures came through, I'm going to turn that audio off because that was internal... you should get an email in about five seconds based off with this quote there, you may have to refresh your inbox, but just so you on the customer engagement side, you can see what the customers will get with that quote.

14439261676

1:23:27 Okay. I see it. Click here.

CHRIS

1:23:30 I think you scroll to the bottom, you can save you and respond.

14439261676

1:23:37 Okay. So you just have a button for approval and that's it.

CHRIS

1:23:41 That's it.

14439261676

1:23:42 By, if I hit approve or are you going to charge you 780 dollars?

CHRIS

1:23:48 We're a little more expensive than that, but now...

14439261676

1:23:50 You better get some compresses out of it?

14439261676

1:23:54 Okay.

CHRIS

1:23:57 So if you hit approve something, I'll show you kind of what happens from my side.

14439261676

1:24:03 I'm gonna... I'm gonna do that.

14439261676

1:24:11 Happy hour with center.

CHRIS

1:24:14 So, the other thing that happens when... when Jake goes ahead and use that quote for... you guys, want me to email notifications when your customers are take.

DANIEL

1:24:24 Okay. Alright.

14439261676

1:24:26 It's like I got it approved. I like that, that's really easy and... and the customer portal side of things.

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

14439261676

1:24:34 Let's see Chris, let's.

14439261676

1:24:35 Let's do this because we do have a commitment to get to here in a few minutes. I'd really like to see the customer portal side of things because that's... that's important like the in and out. So what they can see and I know we... we kinda touch on it briefly, but let's we'll... we'll reconvene, but we'll get a list of questions and then get in touch with you again and we, they will try not to ask you to me Foundation question.

14439261676

1:25:01 Yeah.

CHRIS

1:25:01 So, so let's do that. Let's get that list of questions together because that may be two separate phone, maybe two separate conversations.

14439261676

1:25:08 Got it. And.

CHRIS

1:25:10 Jake, I'm local and Maryland too. If you guys are up for it all, come to your office and kind of have one of those conversations face to face.

14439261676

1:25:17 And I mean, hard work for tandem York and Boston.

CHRIS

1:25:21 I am a bottom accounting boy, but no, I do not work for candidate, you know?

14439261676

1:25:25 Wants a job if you do the job.

14439261676

1:25:28 I run into basis every day, picking up there. Yeah. Alright, Chris, thank you so much.

CHRIS

1:25:35 Hey, thank you. Take care bye.

The End