Meeting with ServiceTrade & Thermosystems, LLC

Brooke Caskey with Thermosystems, Llc.
Recorded on 12/13/22 via Zoom, 1 hour 0 min.

Participants

ServiceTrade

Brooke Caskey
Territory Manager

Tim Spink
VP of Outside Sales

Chuck Dunham
Field Manager

Tanya Eney
Partner Manager

Thermosystems, Llc.

Tracy Dorman
Owner

Topics

Transcript

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TANYA

0:00 Hello? Hi, Chuck has the best. Chuck. I love all your like things. How do you do that?

CHUCK

0:09 Yeah... it's a secret.

TANYA

0:13 You're actually the artist, you sketched it out.

CHUCK

0:16 Right. I do oil pages on the site.

TIM

0:22 Team didn't...

TRACY

0:24 Hello?

BROOKE

0:25 Tracy is in the waiting room, but I wanted to let you guys in first.

--- Access to information ---

BROOKE

0:29 So my iPad is not, it's plugged in. They have the little square like I'm charging thing, but it won't turn on. So to see something from the mobile app, Chuck, I might need you to jump in, but I have it just in case my charger is going slow or something... but everything else I have set up, but since he never sent our questions, I'm just gonna, during introductions, ask everyone to go around and see what they're interested in seeing just so we can guide the conversation if that sounds okay?

--- Access to information ends ---

TANYA

0:59 And I can stay on for at least 45 minutes if it does it make sense for it, but I do have to hop to another call with a customer looking at something, add, whatever 1,245.

BROOKE

1:11 Okay. No, I'm gonna try to have you go first. I haven't planned out, may have, but we'll see if that actually happens.

TANYA

1:16 Yeah, sounds good. Cool.

BROOKE

1:19 Thanks guys. Okay. Well, that Tracy, him?

CHUCK

1:20 Alright.

CHUCK

1:25 In Tim, you met Tracy, right?

BROOKE

1:40 It's not a one man team anymore. There we go.

BROOKE

1:54 Hey, Tracy. Good morning. How are you?

TRACY

2:03 Good. How are you? So, I've got a, Nina Campos who's our... general manager of accounting controller, chief encounter, chief economist. And then Mike Murray just ran to grab a cup of coffee. We've all been backed up in meetings all morning this morning itself.

BROOKE

2:25 Okay. Perfect.

TANYA

2:26 So...

BROOKE

2:26 I heard you say. Is it mean our mean... enough? Okay, Nina, and then who was the second person before my?

TRACY

2:35 My Maria, who's the president of the company?

BROOKE

2:38 Okay. So, it's just the two.

CHUCK

2:41 Hello? Hello?

BROOKE

2:47 Right. Are we waiting on anyone else on your side? I think you mentioned or via my join.

TRACY

2:52 No, she is not.

BROOKE

2:54 Okay.

BROOKE

2:59 Well, let me know when you guys are all situated and then we'll get started.

TRACY

3:03 We are ready to roll.

BROOKE

3:05 Perfect. Well, my Tracy, me and I, thanks for joining us. So, Tracy, you know, me, I'm Brooke, I'm the territory manager here at service trade. You also know, Chuck, he's my outside counterpart and, you know, Tim who visited you almost two years ago.

TRACY

3:22 How you doing, Tim?

TIM

3:23 Good. See, Tracy. And if I remember correctly, you're a big soccer fan, right?

TRACY

3:27 I am.

TIM

3:29 So I guess you can watch a little woke up probably.

TRACY

3:33 Yes, staying for us on that.

BROOKE

3:38 I'm newer to the Tanya. Any, she's our integration specialists, and she's sort of our accounting guru here. So my sort of plan for today is first, I wanted to go around the room and meet some of the new faces on your side. Maybe we could go round of introductions, say where everyone's interested in seeing are talking about today. And then from there, I thought we could start with the accounting portion and then take the additional feedback or questions you might have, do a little demo and answer your questions, and then sort of map out next steps from there, if that sounds like a good plan. Perfect. Cool. So.

TRACY

4:15 Hello?

BROOKE

4:16 Tracy might mean if you guys want to go around the room and maybe introduce yourself, say something that you're interested in when it comes to selecting new software just so we can sort of make the best use of our time today.

TRACY

4:27 Okay. Well, go ahead and start with Mike. Hi, Mike.

CHUCK

4:34 Yeah.

TRACY

4:34 Just looking to... optimize our.

TRACY

4:39 Yeah, great lot of efficiency and our, and everything we do in general, doubling our work... as far as within the service department, but also in the county group. So, yeah, looking forward to hear from you guys.

CHUCK

4:53 Okay.

BROOKE

4:54 Any specific areas that you're wanting to see more efficiency compare to how you're maybe doing it today... besides?

--- Accounting integrations ---

TRACY

5:03 That, that would be more on my side. I mean, currently, everything that comes out of job cost, I think has to have a manual entry into Computerease. Tim is very familiar with this. He sat in on multiple meetings with CSS or it provider and software provider for Computerease. Well, at least at that time was, but since that time, Computerease has been purchased by dell tech. So, but 10 sat in on all of that, and that's one of our big pain points is how can we select a software program that will not only handle the operation side of the business but also make it easier on accounting? Because right now there's a lot of manual entry between the accounting department, Computerease and job costing?

--- *Accounting integrations ends* ---

BROOKE

5:58 Okay. Okay. So efficiency in the way of reducing manual entry across the board? Okay, correct. Cool. Well, let's do need an X.

TRACY

6:09 Hi, Nina, campus, I am the controller of the company and been... here over 20 years. So our main thing is efficiency and ease of software, ease of integration and the data input to, we have three different segments of our company, our service division, large equipment sales division, and our parts division, all that we need to report up... and a couple of different factions as a whole. And then by division. So we're looking to is... how we get that data into a reportable aspect to report up to our different management teams and our corporate office. So that's really a big part of the integration of bringing everybody under the same umbrella to make that easier. So in the event it's no longer manual and we know 100 percent sure that it's you know, ties back and ties out. So.

TRACY

7:42 We also have a commission aspect that we wouldn't need to a... piece that we need to get out of service trades. We run commissions on our sales team for our service division. So any ease of incorporating that would be great as well.

--- *Accounting* ---

TRACY

8:07 Yeah, it's something we'll probably want to look at today for sure is how you guys handle commissions, the sales side?

BROOKE

8:17 How do you guys do that? Now? It's out through job cost.

TRACY

8:21 No. Well, yes, but no. So it's a very manual process. I won't bore you with the details but.

BROOKE

8:27 Okay.

TRACY

8:28 It basically goes from an excel template and do an email that gets distributed then goes into another spreadsheet. It's a very tedious manual process right now.

BROOKE

8:42 Okay. Because Tim and Chuck correct me if I'm wrong, but I don't think we touched the permission side.

TIM

8:48 We, we can, do you do a Tracy, do you do it by location?

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

TIM

8:54 And other words, this at the salesperson is associated to this location or is it by service line? Meaning plumbing electrical, mechanical?

TRACY

9:05 No. So, so what happens is when they sell a job, right? Whether it's a plan, maintenance agreement, a turnkey project, or quoted service project, that work order associated with that work orders, who the salesperson was, and part of building out that proposal includes their commission which is based on their commission as a percentage, a flat percentage of sold at gross margin. So we know right? When we put the proposal together how much they're commission is going to be, then that costs gets associated with that work order. So then when that work orders completed and build for and paid Nina that triggers the accounting department, the pay the commission.

TIM

9:55 Yeah.

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

TIM

9:56 And there's a spot you'll see it every now and then when she's doing our demos spot, that says sales person, as long as you have that included at the service level, you can calculate their commissions gotcha.

BROOKE

10:09 That's cool. Okay, cool. Well, everything you've mentioned so far, I believe we can cover today if not in general.

--- *Accounting integrations* ---

BROOKE

10:21 So why don't we start with the accounting portion, just got maybe 20. I mean, I can talk through some of the things that are geared more towards accounting. I know that there is the idea of maybe moving away from Computerease that we've mentioned the lightly. And so... Tanya is here to talk about the Computerease connector if it makes sense to do so. But she's also well versed in Quickbooks and other accounting systems. So.

--- *Accounting integrations ends* ---

TRACY

10:46 Just for clarification, I mean, what we... do and for the selection of this process for the foreseeable future, we will be tied to... overhead under that premise.

TIM

11:02 I think Tanya and I were just talking yesterday pre and I think we're up to 37, did you say Tanya?

--- *Accounting* ---

TANYA

11:09 Yeah. There's quite. Yeah, yeah, probably 37 or close to 40 Computerease.

TIM

11:14 Have customers?

TANYA

11:14 That use service trade?

TANYA

11:21 Well, cool. Let me share my screen and let's take a look at the touch points so they make this bigger... smaller. So service trade... with Computerease. There's Computerease doesn't have API, but Computerease has a lot of import capability. So that's what service trade utilizes. We have a tool that we call the service trade accounting connector, which is a way that we can export data out of service trade, but we can apply logic and formulas to it so that we can get a file that can then be turned around it imported into Computerease. And so that's what we're gonna talk about today is our import export connector that we call stack internally, service trade accounting connector. So these are the touch points between the two systems in service trade. You know, is it sort of a shift from doing invoicing inside of Computerease to doing that invoicing inside of service trade.

--- *Invoicing* ---

TANYA

12:21 So we'll be able to put together our invoices in service trade, we can send them out there's. A nice link that the customer can see the service history or the service details on that invoice gets export it out and sinked over to Computerease. And we import that in through the free form invoices tool.

--- Tech time tracking ---

TANYA

12:39 Now, since in service trade, you also have the option to collect the labor. Now that labor may just be collected for use with billing or so it says a lot of people have gone to start doing as well for collecting that labor for billing. Let's use that labor information for exporting for payroll purposes.

--- Accounting ---

TANYA

12:56 So we also can export those job labor items out and then turn around import them into Computerease to used for payroll. Now, if you're depending on how you're doing your purchasing, if you are utilizing Computerease, this purchase orders, we, if we start referencing the service trade, job number or this massive over for it as like a work order and their old system.

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

TANYA

13:19 We reference the service trade, job number on the Computerease purchase order. Then we can export those purchase orders along with that cost on those purchase orders to become material cost items and service trade. So typically how this works is that with things like invoices and purchase orders that's something that users will do on a daily basis.

--- Accounting ---

TANYA

13:40 So maybe the first thing in the morning you export your files and you import your files now for labor, that's more of a weekly tasks that you would do on a weekly basis. So how...

TRACY

13:53 For you right away. So you can we generate in lieu of doing purchase orders and Computerease, can we generate purchase order, hers and service trade and then export those to Computerease?

--- Parts management (inventory) ---

TANYA

14:08 So we can create, so service trade does have purchase orders. We may look at my slide here. We do some connectivity through really just journal entries that we would be making adjustments to the journal entry. I was just in the adjustments and certain Computerease as a journal entry. So we're not really importing the purchase orders where we can create the purchase orders. And then maybe they could be imported as a journal entry to represent the cost associated with that could be matched up against ap. So there is some option there with that.

TANYA

14:54 So for accounts receivable, how the workflow works?

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

TANYA

14:57 Is this is what our, this is a screenshot of a service trade, electronic invoice where it's got, you know, who it's going to. It's. Got that great service link that the customer can click on and see all the details. They can see, very, you can show varying levels of detail on the invoice.

--- *Accounting* ---

TANYA

15:13 There's a pay now button. And then that, so on a daily basis, someone will come and say, I want to export all of yesterday's invoices. It creates a file. You turn around and go into Computerease. And you import those items. Now with that, there may be rules that you've got as needed was mentioned, you guys have got different segments. If those are different divisions, we may have some coding in there. So it knows that this goes to the service division versus the part sales division.

CHUCK

15:45 What kind of files that?

TANYA

15:47 It's a, I think it's Computerease uses an XML file. So it's an XML file that we create.

TRACY

15:56 Seems very similar to impact the active activate dumps. They are into the Ar and you have to select them. All the posts with activate unsafe. There's curve audit that has to go on every week because the sync issues. And then the ap just gets dumped... every morning. I print and post... seed and... post all right. Thanks every morning. So... this seems familiar.

--- *Tech time tracking* ---

TRACY

16:38 Okay.

TANYA

16:41 Good. And similar workflow in with the payroll except for this is probably something that's realistically done once a week. Yeah, as people make corrections and things to time. So that these hours that are on... the labor journal, excuse mean these hours that are on the job like these two hours here, that would be part of what gets export it out and then import it into Computerease.

--- Parts management (inventory) ---

TANYA

17:14 Same type of... logic can be applied if necessary. We can add rules and...

BROOKE

17:21 To...

TANYA

17:21 This export... and then this is the part the current purchase order workflow. But I will follow up because we do have other products that utilize when you want either a journal entry for purchasing that's done inside of service trade and our partsledger module.

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

TANYA

17:39 Or I could see, you know, we could bring the purchase orders into Computerease as a purchase order, but others utilize when you receive the purchase order inside of partsledger, that receipt essentially becomes an accounts payable invoice and needed, did I hear you say you guys right now, we're importing ap into Computerease?

TRACY

18:00 Yeah, from one of my other divisions?

TANYA

18:02 Okay. So that may be something, is it so you can import ap, then we may be able to do something like that. When you receive the purchase order, we make that receipt really in an ap invoice that gets imported.

TRACY

18:20 Okay.

TANYA

18:25 So those are really the main workflows.

--- Parts management (inventory) ---

TANYA

18:26 Now, do you guys are for the service division? If you are looking at that are partsledger purchasing module, are you also tracking inventory as well?

TRACY

18:35 Now, okay. Yeah, we get quotes on everything and then we purchase parts from somebody else that handles either in house or another vendor.

--- Accounting ---

TANYA

18:46 Okay. Okay.

TRACY

18:50 We don't have to worry about the story.

TANYA

18:52 Gotcha. That's that is very nice to. So those are our, it's really our three main touchpoints, and I can follow-up Brooke and Chuck on the, this potential stack to import in like received purchase orders as a P invoices into Computerease.

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

BROOKE

19:12 It's not require them to be on partsledger even if it's just for purchase order.

TANYA

19:16 It would, it would endless. Yeah. Yeah. Probably would... the only thing is we could talk about after is if we were to utilize just like a status and something, but I think partsledger, I'd be more organized because then, you know, it's more controllable to say, hey, this is a purchase order versus kind of using fields inside of the line items and service trade.

BROOKE

19:40 Sure. Perfect. Yeah, we haven't touched on partsledger yet, but definitely something we can touch on especially if it's just pose.

TANYA

19:50 Yeah.

TRACY

19:51 Not gonna have a field see from our customers.

TRACY

19:55 To the vendors. Okay. So quick question in, so receiving the purchase orders, which I believe you said is also like the ap invoice that gets entered into service trade, right?

TANYA

20:14 Right. So, what customers have been there's? A play as a reference number, a reference number field they'll use that is like the invoice number. So when they're doing the step of receiving in partsledger, they'll say, okay, I've receiving this because I have an invoice from my vendor and I'm gonna use that reference number is going to be the invoice number, and then what else? So once it's been received, I know I can shuttle that over to Computerease as an ap invoice.

TRACY

20:51 And how does service trade handle partial receipt of vendor purchase orders?

TANYA

20:59 So, you can't do a partial receipt of a po. And when you have a partial receipt, is that typically, are you typically then invoice by the, your vendor for that partial receipt? Yup. Okay. So then that partial receipt would just become that ap invoice. And then the balance would sit there until you got the balance. And then when you received the balance or even another partial receipt, then that would become another new ap invoice.

TRACY

21:26 Okay. Okay. And then once I assume wants all the value workflow to be on the purchase order is received, the purchase orders closed and cannot be altered, correct?

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

TANYA

21:44 I believe. So what we can confirm that, yeah.

TRACY

21:49 So, that way, Tracy be a lot of the po duration for a dollar. So we'll have to be updated.

TRACY

22:03 Yeah.

TRACY

22:08 Okay.

TRACY

22:11 Yeah, right. Right. Sure though.

TRACY

22:20 Okay.

TANYA

22:21 Okay. So that's all the touchpoints between Computerease and service trade. Were there any other questions on that? And I'll follow up on the importing of the ap, but that's good to hear that you guys are already doing that. So it sounds like we just, I just need to confirm it and I'll let Chuck and Brooke now.

BROOKE

22:44 Sure.

BROOKE

22:48 Well, if there's no other questions for Tanya, you can go ahead and drop it, then I'll ping you if anything comes out.

TRACY

22:57 Yeah.

TANYA

23:00 All righty. Thanks. Nice to meet everybody.

TRACY

23:03 Hi, thank you.

TIM

23:04 You're...

TANYA

23:05 Welcome. Bye. Have a good day.

BROOKE

23:07 Hey, now we can talk about the service side. So I thought today we could start, let's start in the office and kind of look at some of the background, first, the data set up and how everything is tracked from your end.

--- Access to information ---

BROOKE

23:23 And then we'll take a look at the tech view too. So you can see sort of the ease of use out in the field and the information your technicians have access to. So I'm gonna go ahead and share my screen. And as I go through this, please interrupt me if you have any questions or comments. I don't mind at all. Can everyone see where I'm sharing service trade, demo, my mouse here? Yes, perfect. So, starting here in the office admin view. So I like to start on the dashboard typically just because that's your landing page when you log into service treated sort of your home base.

--- Dispatch ---

BROOKE

23:55 And that's the day to day operation. First thing you're gonna see is your daily schedule. So you'll be able to see your technician type of work you're doing. And then from there, you're given a good checks and balances system like the ability to see that you've got 131 overdue jobs about appointments, kinda lets you be proactive on rectifying any of those mistakes before customers are calling you. And then down below, you'll see it says post jobs to be marked complete. So this indicates the technicians gone out and done their work marked as complete on their end checks and balances. Again, we're going to have this review as well make sure there's no errors. Nothing Twilio was messed and you'll note that some of these are flagged.

--- Deficiencies ---

BROOKE

24:36 And so, any fires indicates that if we can see found and here's a reminder first that issue or repair piece of equipment... visual queue, you know, three times right here, you might note that there's three opportunities. So I'll revenue should you act accordingly, let's get our quotes around here?

--- Deficiencies ends ---

CHUCK

24:59 Yeah.

TRACY

25:01 Little girl?

BROOKE

25:04 I heard that.

BROOKE

25:08 That... are you guys on two different speakers in your office maybe?

TRACY

25:16 No.

BROOKE

25:17 No.

CHUCK

25:19 Add on?

BROOKE

25:23 No, it's not connected.

TIM

25:26 That's better now?

TRACY

25:27 It, it's...

TIM

25:28 Better now.

BROOKE

25:29 Okay. Well, did you guys hear what et cetera. You want me to say at all again?

--- *Dispatch* ---

TRACY

25:33 Think we're okay.

BROOKE

25:34 Okay. And then down below, we've got jobs based and so helping you stay home.

TANYA

25:45 Brooke, can you show?

TRACY

25:48 Us, the dashboard, sorry, the... technician schedule like a calendar... like we call it, the dispatch board. Are you talking about like a calendar view like a weekly calendar view of all the technicians?

--- *Recurring maintenance* ---

BROOKE

26:10 Yeah. So that, so bear with me. Let's talk about the locations. You can see how those are preset.

TIM

26:19 Yes, they're still getting that echo?

BROOKE

26:22 I know. I don't know.

TRACY

26:30 Yeah. Let me mute.

BROOKE

26:33 Okay. Is that sounds better, right? Okay. Perfect. Sorry about that guy's so before we go into scheduling, just one quick step before about, so you can see how everything is set up. So here, we have our location page on this specific location. We do the following services. So you can see, I've got a few examples here. So I've got like a quarterly HPC preventative maintenance quarterly for duration, so on and so forth. Now, if I click into one of these, you can get a good idea of how these are preset. So each service that you set up in service train, you're gonna tied into the piece of equipment you're working with, you can input a template for any recurring services that you do, where your description and your perks laboring items will pull in automatically. You can set up preferred technicians, estimated price and duration. And then more importantly, you can tell the system hey, how often does this need to repeat? So think of this as a set and forget. You set this up one time and then the systems actually gonna track it for you.

TIM

27:30 By the way, for the sales commission component, that question, you always have to pick your contract. So, and she goes through that. I'll keep point that stuff out, but that's how you would attach it to the services.

BROOKE

27:43 Yep. So that is how the services are set up. And now what you can do with this information as you can actually run all sorts of reports and service trade. But one really helpful one is the service opportunities report which allows you to forecast either what's up ahead or maybe what you might have left slipped through the cracks on accident. So you can select a date range and say service trade, show me my jobs do by X date range and it's gonna populate the list that is that drives from the location pages and the services that your preset. So I've said show me my jobs two and three months across the board. And I've ended up with this list here. So if I click on something like comcast center, it's going to show me that in March. I have the following service do based on the parameters I've set and all of this is pulling from my location pages in those preset services. So you can run your report and then... put in the job type that it is. So if you know that you're only running report of your recurring services, you can actually bulk create as many jobs come up at once. So I can go ahead and create my 10 work orders.

--- *Dispatch* ---

BROOKE

28:52 And then you asked about scheduling view. So that's actually the next step here. So you'll create your work orders, and then those will populate onto our map based scheduler. I'm out the area of their job site. So I am zoomed into to the Charlotte

North Carolina area. Of course, you'd be zoomed into your area of service. And the pins you see here represent the jobs that we've just created. So I can see that I've got a plan maintenance and I've got a service call in a similar area here. So the way to schedule these jobs is you'll click you'll see what type of job it is. And then it's a simple drag and drop. So over on the left, you see you have your technicians and I'll take this one to Tim. It's gonna turn his hot pink color. And then once we know what day we need Tim to go to that job, we can go ahead and put them on the calendar and it's going to gain a little calendar icon. If Tim needs to partner on the call, we'll just drag it to another tack. They'll see it now says one day two technicians. And so that's kind of your week scheduling view. Okay. Did that answer your question? Yes, perfect. So today I went ahead and I set this up a PM job.

--- Recurring maintenance ---

BROOKE

30:05 We're going. To be working on my quarterly H fact job that's due on our pretend customer. And again, since this was part of my preset service that is recurring my description, parts, labor and items, everything I needed to know about this job pulled in automatically. So it is essentially just a matter of me say, alright services do, let's schedule a date and time for the right technician.

--- Access to information ---

BROOKE

30:31 And since service trade is a cloud based platform as we head out to the field. And just a second, we're making Progress whether we're clocking in or taking pictures or reporting deficiencies, filling out paperwork, everything we do is gonna... sort of transition back to the office in real time.

--- Access to information ends ---

BROOKE

30:46 That way everyone on the admin side can be taking the best next steps as necessary as the work's been completed.

BROOKE

30:57 Any questions about the work order here?

TIM

31:01 No.

BROOKE

31:05 Okay. Let me see. Okay.

--- Access to information ---

BROOKE

31:17 Okay. Can you guys see where it says? I hop in my appointments? Let's talk?

TRACY

31:22 Yes, okay.

BROOKE

31:23 So this is mobile view now service trade. So what your technicians would wouldn't see throughout their day to day, we're iOS and android. Friendly. I always like to clarify that phone or tablet, continue to your preference.

--- Dispatch ---

BROOKE

31:34 But when your technicians log into service trade, the first thing that they're gonna see is their appointments for the day. They can also see any unscheduled work assigned to them, maybe something with the flexible due date. But we know, hey, Brooke needs to be the one to do this job and then any completed work as well.

--- Access to information ---

BROOKE

31:49 But focusing here on our PM job that I have here is my mobile work order. So the purpose here is it should be intuitive resourceful, easy for the technicians to use and really set them up for success when it comes to giving them the right information to work with this customer.

--- Tech On-site ---

BROOKE

32:07 So down at the bottom, we have our clock events. So we've got on site and route and job prep. They can clock in and route when they're driving to the job site, they can send an vacation. Tracy. I know that we looked at that last time. So I'll kind of breeze over that, but I'll go ahead and clock in.

--- Assets ---

BROOKE

32:24 And then my first instinct is always to go up tier to services. Take a little bit. What I'm here to do today. Keep in mind that the verbiage I'm sharing is just pretend so you'll have your own verbiage and list in your system. But now I know what I'm here to do and I'm going to now go down to assets and take a look at the piece of equipment I'm working with. So I can click into this H back unit and I can, you know, make sure everything's up to date in terms of make model serial number. But more importantly, I have easy access to the service history of what's been done before. Just so I have more contacts on like, hey, does this break often?

--- Assets ends ---

BROOKE

33:00 Who was here last time? What did they log? What information do I need to know before I start working with us... so far?

TRACY

33:10 Yup.

--- Type of work ---

BROOKE

33:19 And then because we're going through that Tracy, did we talk about how you guys are competing forums right now?

TRACY

33:28 Yeah, we touched on it. So we currently, so we have different workflows, right? So we've got startup in our revenue buckets. We have startup work. We have warranty work, we have planned maintenance work.

--- Forms ---

TRACY

33:43 We have 400 service project work. We have turnkey work. And then we have various levels up to you and time and material work. So basically our revenue buckets, but yes. So... we will have forms associated with virtually all of those.

BROOKE

34:04 Okay, perfect. So as a quick refresher in terms of completing forms and service trade at our core level, it's gonna look something like a billable PDF tied to Adobe acrobat that you couldn't complete and then link it directly to the work order once it's filled out. And so the system is actually smart enough to know to dispatch the right form according to the type of job you're at. So whether it's a turnkey or a maintenance, we'll be able to kinda code that for you. And so in this case, I can go ahead and open up my maintenance paperwork since we're on a maintenance shop today and then fill it out and Adobe and then like a directly to my work order.

BROOKE

34:55 And you can see that we have the information pull in terms of like the text name, the asset that we're working with today, and then we can go ahead and fill them sign. And I promise I won't bore you guys into this whole form. But just so you can see the functionality for the tax... is this similar to what they're doing now in terms of form completion?

BROOKE

35:31 Talking?

TRACY

35:33 Yeah. They have to fill out an editable PDF.

BROOKE

35:38 Yep. So then you can just copy the signature service trigger and it'll link directly to their.

BROOKE

35:51 So let's think that. Has we're going through our checklist, we identify that there is something wrong with one of the piece of a piece of equipment that we're working with.

--- Deficiencies ---

BROOKE

35:59 So to, of course, we're going to mark that on the forum. But for the office has benefit in anyone in charge of quoting or ordering parts, things of that nature. We're also gonna market and service trade. So we'll go up here to deficiencies, and we'll go ahead and add her deficiency. So I'm gonna say that there was a broken compressor... and then we can take a photo of the issue. They can take live photos or upload photos from their library if they have any that they forgot to open up service trade for some reason. But as many as you need. And then we can, so, you know, label those add captions if needed. But we'll keep it simple today. Next, we're gonna indicate the severity of the deficiencies. So keep in mind sort of the time line aspect of your customer at this might be the second or third time that this has happened. And, you know, we've started with the suggestion they put us off. We're now at deficient or an offer bowl. We have that to present to them pretty easily. And then we'll try it back to our, you know, and then market as new. And the technician can add a proposed solution. Now, as soon as they save this, the person in charge of getting quotes out for those types of repairs is going to be set, that report thought the technician generated, they'll look at sort of what was found and then know exactly how to flip that into proposal.

TRACY

37:32 So, can we... how do you determine who that goes to? What if we wanted to go to multiple people?

--- Deficiencies ends ---

BROOKE

37:42 So that's part of the, so when you're setting up your account, right? And then what information?

TRACY

37:49 Gotcha.

BROOKE

37:52 And I believe it can go to multiple people.

--- Assets ---

TIM

38:04 Yes, I can get multiple people.

BROOKE

38:06 Thanks, Tim. But what are your thoughts so far in terms of the mobile aspect and how you see your technicians benefiting from something that custom field?

TRACY

38:20 Yeah. How about when it comes to the asset? Can you upload pictures of... the name plate data? Do you guys have OCR technology that will read the main plane data and automatically populate for you guys? Have anything like that in the in, as far as asset management is concerned?

TIM

38:49 Yes, we can, it's not gonna populate retail, but if you're trying to get make model serial number, the iPhone can do that. And Chuck, I think you have a video, we can.

--- Assets ends ---

CHUCK

39:03 Yeah. I was gonna say I'll send you a video after we're done here. That shows okay an example of how that's done. Perfect.

BROOKE

39:12 Yeah.

BROOKE

39:17 But overall, I know you said that ease of use was important to you especially from feel view. What are your thoughts from a technical perspective?

--- Tech On-site ---

TRACY

39:28 Yeah. The big thing, they just need to be able to fill out forms. And yeah, it looks like you guys are checking all the boxes as far as the mobile app is concerned.

BROOKE

39:43 Perfect. Anything here in the... current period. How often?

TRACY

39:52 Let's see here deficiencies comments, services, attachments, can, thanks... have a job items if you could click on that.

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

BROOKE

40:02 Yep. So job items just refers to maybe the parks or the labor items that you've applied to this job. This is also where a technician can go over to our parts up and then cut a po, if they need to. That's not something I have setup to demo at the moment, but they can go in and indicate like, hey, if they need a widget or a pipe or something, they can select the job item, say where they need it from and then love that it needs to still be ordered. And then things like that.

--- Parts management (inventory) ---

TIM

40:33 Will pull in your parts list... probably had a computer because I guess put it... that way. It's type ahead which means as soon as they start typing, yeah, whatever widget it'll come up and get the new part number and we're pulling up. So don't have to sit there and keep typing.

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

BROOKE

40:54 Yeah. And if I place, you can say, for example, I grabbed this auto, my truck, I went to, I went to home depot and I grabbed encourage say here's a receipt. I need this from the warehouse and so pretty flexible there.

TRACY

41:09 Yeah, we typically, just like I said, don't do that. We'll get a lump sum quote, not saying that the guys don't have to run to home depot or, you know, low for menards occasionally and pick up some, you know, bracing material, something like that, but typically, they just up upload their receipt into the work order, manually, put in what they bought and that's about it. But other than they don't issue fios, that's all done by our coordinators. Yeah. Yeah. So it's pretty simple.

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

TIM

41:42 Yeah, 90 90 percent of our customers to exactly what you do because you're right? The most expensive resource they have is their technicians in. The last thing they want them doing is, you know, sitting there trying to type all that stuff. And so, yeah, you can put it in boxes stuff.

--- Dispatch ---

BROOKE

41:55 Yeah.

BROOKE

42:00 Well, before we go back to the office, the one thing that I always like.

TRACY

42:03 Can we hold for just second? Mike asked me a question. So I'm gonna put you back on mute real quick.

--- Dispatch ends ---

TRACY

43:55 Okay. We're good. And you guys have any other questions? Nope. Nope. We were, Mike was asking some internal questions that really don't have anything to do with it.

TIM

44:10 Important, not concerned.

BROOKE

44:12 Correct. Nice. Simple as so before we go back to the office view and sort of talk about flipping that deficiency interrupt proposal.

--- Tech On-site ---

BROOKE

44:21 One thing I always like to encourage is the use of a work acknowledgement really to showcase your value to your customer and make sure everyone's on the same page in terms of what's been done thus far, especially when any deficiencies are found. So what you can do with your point of contact if they're on site is you can open up a work acknowledgement and then select the right contact and then go through and, you know, Tracy, we came out here.

--- Tech On-site ends ---

BROOKE

44:44 We did this service today. Everything went fine except for one small issue. We did for broken compressor. Here are the pictures I took, the paperwork that I filled out. Everything look good to go. They give their thumbs up and then be able too review and provide their signature just as another layer of sort of, I guess liability coverage is the best word to use.

--- Tech On-site ---

BROOKE

45:10 That for you guys. I'll go ahead and it's gonna ask me what I've completed and CS or no, I'm done with this visit. I'll just put yes for now, but they can leave them open if they need to.

BROOKE

45:31 Okay. So let's go back to the office.

--- Tech On-site ends ---

BROOKE

45:46 Okay. So back here on service trade, everyone can see my job, right?

TRACY

45:51 Yeah. See.

TIM

45:53 Where it says by the way, you see where it says job salesperson that's how their check tracking, all this too, because each job as an associate in sales, personal room again, once you create those contracts associates. And so.

BROOKE

46:06 Good call out.

TIM

46:08 Campaign.

TRACY

46:10 Yeah. So you can put multiple people on there because... there is a possibility that we may have split down the road may.

BROOKE

46:25 Salespeople.

TRACY

46:27 Correct? Or let's say you have, yeah, there may be just where we have to split a commission.

TIM

46:37 Well, what, how do you?

--- ST app contracts and pricing ---

TIM

46:39 Let me think? I don't think there's a way to put in more than one salesperson on a job is a job specific? Or is it location that you would split it or talked a little bit more about that? There's?

TRACY

46:50 Hey, let's say it's probably jobs specific, right? So there may be times where one salesperson may have a level of expertise that another one doesn't or you may have a relationship that the other one doesn't so he actually ends up participating and helping get the deal done. Yeah. And at that point, we'd have to split a commission.

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

TIM

47:12 Got it. Yeah. I mean, it look, so you can definitely change that on a job. The other thing that we feel worker in that case, we have these things called tags so she can show you, Brooke can show you and basically you could create a tag. If it's right there, it says add tags and you could just add that person's, name as well for the job. And then you can still run a similar report which I'll show you to gather that information.

--- ST app contracts and pricing ---

BROOKE

47:39 Yeah. And then they would just apply as a line item with the relevant commission.

TIM

47:44 That's right?

BROOKE

47:45 Okay. Correct. Go back here on our job. We can essentially see the Progress that we've made in the field. So we can see that's marked as completed from the text view. It's still in Progress from our view.

--- Tech On-site ---

BROOKE

47:56 And then scrolling down, we can see the information that we've logged. So here are my two o'clock events. Here is my deficiency. I found will come back to that in just a second here. And then here's my two attachments. So any paperwork that your technician fills out. And then there's the signature that I collected from my point of contact... but focusing here on our broken compressor.

--- Deficiencies ---

BROOKE

48:17 So here is the report that your designated person wouldn't be emailed. So they'd be sent this and then they'll be able to review the details here. So they can open it, see that's been marked as an operable to broken compressor. She thinks we should fix.

--- Quote templates ---

BROOKE

48:33 It. Looks like it's happened for the other time. So definitely something to be mindful up now for this customer. And then it looks like she added a few photos for us to reference as well. So now that we know exactly what's wrong with this equipment, we can go ahead and create our quote tied to the right contract, set an expiration date if needed. I'm not going to be too picky. And now we're in the process of building out a quote. So we wanna make this really simple for you. So same way you can add service templates when you're setting up your locations, you can also out and quoting templates. If there's something that you're sending out on a regular basis, definitely want to save you that have been typing time. So you'll have your list of quote templates in your system. I have a few pretend ones here. So we'll go ahead and apply my compressor replacement. You'll see my parts, labor items, the verbiage for the customer pulls in automatically. This can all be edited as needed. I'll point out that in terms of pricing in the background, you're gonna see costs first price by default. It's going to show you your margin of how much you'd make on the job. The system smart enough to adjust the margin as you would just either costs or pricing. But in terms of your customers presentation, you have full control over what they see. So whether you want to give them a grand total or break it out for them, if it depends per customer, that's completely fine. And so I'll do a grand total today.

--- Customer engagement ---

TIM

50:04 Good. Have you said, have you sent him the new study we did on the pull through for the date, all the data analytics about basically increasing some customers on average 25, 30 percent pull through work right? Just by doing what she's doing right here. Because again, it's just easy quick when the texts are out there.

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

TIM

50:27 It's easy for them, snap those photos. But we've got a data study we just did that we can send me an.

BROOKE

50:33 Yeah, that's I think that's in there recapped.

TIM

50:35 Perfect. Okay.

BROOKE

50:38 But, yeah. So now I have essentially got my quote built in a matter of minutes, right? So from here, I can go ahead and send this to my customer. Tracy. I've got you is my point of contact still for this location? And so if you don't mind maybe pulling it up, ensuring with everyone in the room, but I'll pull it up on my side too. So I've got this sent to Tracy... and here's what he's gonna see from a customer perspective when he opens the quote. So you'll have your name and logo here at our cute little arc elephant and you'll have the description of the work, the services to be completed. And then as many media files as you want or need to attached to sort of paint picture for your customer, you know, show them the why of why we need to act on this now. And then we want to, you know, promote easy engagement for them. So having approving request changes makes it simple for them to respond to the quote. At least the request changes as a bit better than a big red X reject button because if there is a questionnaire just viewed on our customer side. This allows them to ask a question instead of just rejecting.

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

BROOKE

52:02 I'd be curious to know everyone's thoughts on the presentation aspect of the quote here in terms of your customers potential bugs.

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

TIM

52:23 They're speechless. They like it so much.

BROOKE

52:30 Tracy, you there?

TRACY

52:31 Sorry, I'm on mute. So, yeah, this would be good... because they can go in and they can get a purchase order or at least approve it in principle and they get a purchase order. Did they have a capability to attach a purchase order to the approval?

--- *Quoting* ---

BROOKE

52:49 Yes. So actually.

TANYA

52:51 Approving...

BROOKE

52:51 It for me really aren't hearing on customer.

TRACY

52:56 Gotcha.

BROOKE

52:58 And let me know when you get back. I turned off my notes, you can have yours that to say, hey, this person approved or this person's an opener?

TRACY

53:07 Yeah... yeah. I already approved it.

BROOKE

53:11 Thank you.

--- Quoting ends ---

BROOKE

53:14 Yep. So you can see it's approved with the date and time stamp with your purchase order here, and then talk on service trade. And now that our job is that there's a few cool things we can do... so.

TRACY

53:27 How about electronic signatures or auditors are kinda bang on getting signatures?

BROOKE

53:38 On the mobile?

TRACY

53:41 Yes, contracts, so on and so forth. They've mentioned that before avenue.

TRACY

53:49 Yeah, we're not mean customer po, we definitely need something.

TRACY

53:55 Gotcha. Okay.

TIM

53:57 Yeah. The... history. So if she goes pretty button there, we can see the URL. So it is, it has been actually... already especially on the fire side... you have a track record of who's going to approve and you're other email.

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

TIM

54:19 Okay? Now, if you're sending out, we just acquired a company called Northboundary, if you are sending out proposals on the front end, that does have signature digital signature, but that's where the proposal let's for, you know, the whole contract.

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

TRACY

54:36 You guys acquired Northboundary?

TIM

54:37 We did.

TRACY

54:40 When did that happen to go? All right. Good to know.

TIM

54:46 Yeah. Do you use it to use it today or?

TRACY

54:50 Yeah, no. But that's part of this process as well is utilizing that as a button that as a tool in the toolbox.

TIM

55:01 Yup. Yup. The whole theory. The reason why we did it was that's a great cpu front end product. And so, once all the contracts have been approved, this, it'll all dumped into service trade, creates a service, create the location, asset details, tasking details, all that well, the influencer betray?

--- Quoting ---

TRACY

55:19 Gotcha. Good to know.

TIM

55:21 Yep.

BROOKE

55:24 Yep. So now that our quotes approved, you kind of have there's kind of two schools of thoughts here, whether you want to create a brand new job, if it makes sense to do that or add it to your existing work that's more of a simple repair that, you know, said technician has time to do that day. I'll keep it simple and just add it to my existing job here.

--- Quoting ends ---

BROOKE

55:45 To make sure I do the right one.

BROOKE

55:52 And then you can copy the quote attachments and then added on for your technician.

TRACY

56:02 So, we're kind of.

TRACY

56:03 Running up, we have a hard stop here at noon. And again, you know, Mike and they know the, for the usability and everything to me.

--- Accounting integrations ---

TRACY

56:12 And, you know, I spent a lot of time with you guys two years ago. Looks like, you know, everything's pretty much in alignment is it was two years ago. With the exception, you've definitely made some improvements as far as the connector between Computerease and service trade. So that's good to see.

--- Purchase decision ---

TRACY

56:34 So really something we haven't talked about today... is really we need to get some numbers from you guys on implementation costs as well as, you know, cost per seat. What does that look like implementation timeline so on and so forth.

BROOKE

56:54 Yeah, I would say let's set up a separate call for that since it sounds like you have a hard stop in a few minutes here, but Chuck and Tim and I can pull all that information together for you. And Tracy, would you be the one to review that with us? Yeah. Okay.

TIM

57:11 Tracy, is this something you can do by the end of the year? You same time line?

TRACY

57:17 So, my goal is to have a decision made on a provider by the end of calendar year that, that's just a decision made, right? This is the direction we're gonna go here's.

--- Purchase decision ends ---

TRACY

57:30 Going to be our partner moving forward. And, you know, I've always been transparent with you guys. I believe in transparency. You know, what? You guys, BuildOps and Salesforce... pretty much have everything wrapped up with BuildOps.

You guys need to get, you know, the pricing, have that conversation, talk about users and everything. And then Salesforce. I had some meetings with them here locally yesterday, got some more meetings with them this week. Obviously, they're more of a customized solution. But yeah, my goal is to have a decision made by year end and a drop dead, go live date of four 123.

--- *Purchase decision* ---

TIM

58:22 Okay. Okay.

BROOKE

58:25 Gotcha.

TIM

58:26 If you feel like you can make the decision meaning signature wise before the end of the year, if that does, if you do feel like you can do, let us know because I could probably throw some nice incentives on it to get it done this year, but yeah, I don't want to pressure you into like a center. We, I appreciate your honesty. So just let us know.

--- *Purchase decision ends* ---

BROOKE

58:46 Sure. Tracy, is this a conversation you'd have time to have towards the end of this week or early next week?

TRACY

58:55 This week, we're travelling starting tomorrow. So, and then I've got Diane here in town. Not a problem job on Friday. So I'm this week's not gonna happen but definitely, you know... Monday, Tuesday, next week, I will be available.

BROOKE

59:14 Okay, perfect. Let me just pull up our schedules real quick and then remind me or Central Time, Eastern Time.

TRACY

59:21 Central?

BROOKE

59:22 Okay. So it looks like on Monday... please... Chuck, Tim and I are all available at two PM eastern, so that would be one PM your time. Would that be a good time to meet for pricing profession?

TRACY

59:46 The to the, yeah, I can make that work.

BROOKE

59:50 Okay. So, I'll send out an invite for next Monday, the nineteenth at one PM central. And then just as a reminder, there's a lot of resources in that recap workspace if you guys haven't had a chance to peruse through that yet.

TRACY

1:00:02 Yeah, but not through there.

BROOKE

1:00:04 Perfect. And then we'll go ahead and follow up with some of the unanswered questions from today's, conversation as well. Okay?

TRACY

1:00:12 Perfect.

BROOKE

1:00:14 Thanks for your time.

TRACY

1:00:16 I know calendars can be here.

CHUCK

1:00:17 Thank you.

TIM

1:00:18 Yeah, hey Tracy.

CHUCK

1:00:21 Bye now.

The End