



ServiceTrade Demo with Pro Serv Food Equipment LLC

Joseph Summerell with Pro Serv Food Equipment LLC
Recorded on 1/9/24 via Zoom, 1 hour 20 min.

Participants

SERVICETRADE

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Title

Topics

<i>Purchase decision</i>	0:43
<i>Type of work</i>	1:44
<i>Customer engagement</i>	3:57
<i>Type of work</i>	4:15
<i>Parts management (purchase orders)</i>	5:58
<i>Assets</i>	6:23
<i>ST app contracts and pricing</i>	6:43
<i>Paper process</i>	9:06
<i>Invoicing</i>	10:08
<i>Type of work</i>	12:10
<i>Invoicing</i>	15:59
<i>Accounting integrations</i>	16:32
<i>Invoicing</i>	17:22
<i>Accounting integrations</i>	17:52
<i>Invoicing</i>	18:15
<i>Purchase decision</i>	19:20
<i>Accounting integrations</i>	19:48
<i>Accounting integrations</i>	21:38
<i>Accounting integrations</i>	22:41
<i>Access to information</i>	25:00
<i>ST app contracts and pricing</i>	25:24
<i>Parts management (inventory)</i>	25:57
<i>Tech On-site</i>	26:32
<i>Purchase decision</i>	27:21
<i>Accounting integrations</i>	27:49
<i>Purchase decision</i>	30:30
<i>Type of work</i>	30:56
<i>Accounting integrations</i>	31:28
<i>Purchase decision</i>	33:03
<i>Purchase decision</i>	34:59
<i>Accounting integrations</i>	35:42
<i>Accounting integrations</i>	36:26
<i>Access to information</i>	37:40
<i>Purchase decision</i>	38:31
<i>Customer engagement</i>	39:45
<i>Type of work</i>	40:39
<i>Paper process</i>	41:12
<i>Recurring maintenance</i>	42:04
<i>Assets</i>	42:41

<i>Recurring maintenance</i>	43:14
<i>Assets</i>	44:13
<i>Assets</i>	44:58
<i>Deficiencies</i>	45:19
<i>Tech On-site</i>	47:15
<i>Deficiencies</i>	47:32
<i>Assets</i>	49:13
<i>Customer engagement</i>	49:32
<i>Tech On-site</i>	50:12
<i>Customer engagement (quoting and invoicing)</i>	50:36
<i>Tech On-site</i>	51:20
<i>Invoicing</i>	51:57
<i>Pricing</i>	53:39
<i>Parts management (inventory)</i>	54:01
<i>Invoicing</i>	54:20
<i>Invoicing</i>	56:53
<i>Deficiencies</i>	57:18
<i>Quoting</i>	57:56
<i>Quote templates</i>	58:17
<i>ST app contracts and pricing</i>	58:38
<i>Dispatch</i>	59:42
<i>Deficiencies</i>	1:00:18
<i>Customer engagement (quoting and invoicing)</i>	1:00:34
<i>Deficiencies</i>	1:01:33
<i>Customer engagement (quoting and invoicing)</i>	1:01:56
<i>Quoting</i>	1:02:35
<i>Quote templates</i>	1:03:53
<i>Quoting</i>	1:04:21
<i>Parts management (purchase orders)</i>	1:05:35
<i>Quote templates</i>	1:05:54
<i>Quoting</i>	1:06:11
<i>Quoting</i>	1:09:05
<i>Customer engagement</i>	1:10:10
<i>Accounting integrations</i>	1:11:14
<i>Pricing</i>	1:12:20
<i>Accounting integrations</i>	1:12:41
<i>Quoting</i>	1:15:05
<i>Implementation and ongoing support</i>	1:18:06
<i>Tech On-site</i>	1:18:29

Transcript

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

MARIA

0:00 Can you hear me?

JOSEPH

0:01 I can, how are you, Maria?

MARIA

0:03 I'm good. How are you doing?

JOSEPH

0:04 I'm, doing well.

MARIA

0:06 And...

JOSEPH

0:08 Cool. Thanks for joining me. I'm Jay, I cover the southeast over here at ServiceTrade. You're not a new burn, right?

MARIA

0:17 Yes.

JOSEPH

0:18 Awesome. Love to love to see people that are somewhat local because we're just right up the road out of rally.

MARIA

0:24 Okay. Yeah, we actually have an office in rali, too. So you're not too far.

JOSEPH

0:29 Cool. Yeah. Awesome. Well, yeah, thanks for joining up with me today. I really what I had planned out for us for today is to talk a little bit about what you're using. Now, what you like, what you don't like, what you're looking to change things like that.

--- Purchase decision ---

JOSEPH

0:43 And then we can do like a 30,000 foot overview of what ServiceTrade does and where the value is that we could bring to pro serve. And if you like what you see from there typically, it takes a few more meetings to really vet out all the details. You all aren't far. I'd be happy to just pop down there and we could spend the morning or an afternoon together and go through everything, start to finish and make sure it is exactly what you want.

MARIA

1:07 Okay. Yeah, that would be good. I know that I had had the phone conversation with Jason. I had gone through quite a bit with her and I know.

--- Purchase decision ends ---

JOSEPH

1:21 A lot of those notes right here. Okay. I've got a lot of that already.

MARIA

1:25 Okay. Good. Yeah, because I think I just kinda laid it all out for her that day... and so she said she was gonna take it to you and that, you know, you would have the bulk of that information for me. So I'm excited to hear, what you have for me too.

--- Type of work ---

JOSEPH

1:44 Yeah. Well, let's start with how much as business is PM versus reactive service versus projects.

MARIA

1:54 So, I would say it's more service work and then the PM contracts kind of come along with it for the bigger customers. At least... we have... three PM technicians that just solely focus on PMS. So, I would say, you know, we definitely do have a good amount of PMS but that's not what makes up our business. We're more service. And then what typically happens is as we start servicing customers, then they get into PM agreements and that's kinda how that process goes. So, a bulk of our work is service work and then projects is not as big. It's something that we've moved into more in 2023 and we're definitely planning on seeing even more growth in that area in 2024... so I would say that's a very small percentage right now too, just as far as like new Construction and getting equipment installed. We don't do H back installs at this time we supply.

JOSEPH

3:03 Try that.

MARIA

3:03 Out.

JOSEPH

3:04 Yeah. Okay.

MARIA

3:06 But that is something that one of our lead technicians is going to get licensed and that's another area that we're stepping into for 2024 2025. So it's to come. But that's not a bulk of what we do right now.

JOSEPH

3:24 Okay. And about the PMS, is that something you're looking to grow or is that just something that kind of hey, as it happens organically, we'll take on more. What does that look like?

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

MARIA

3:33 Yeah. So it kinda just comes along with the territory. I like to say we definitely don't focus or it's not like we go out and just sell it just because we want a bunch of PM agreements or anything. It just, it kinda comes along with it, I guess you could say because customers really like it, but that's kind of grown organically, we don't really push it.

--- *Customer engagement* ---

JOSEPH

3:57 That's interesting. A lot of our clients are kind of the opposite where they're really pushing on those PM agreements so that they can use that to drive repair revenue. So like, hey, we get out there on site. We document this is the state of your equipment. These are the opportunities for additional repair, quote those out.

--- *Type of work* ---

JOSEPH

4:15 And that kind of workflow that's really what keeps our service department busy and help you plan ahead more as well rather than just kind of running and gun and reacting.

MARIA

4:26 Yeah. So, well, so we do, what keeps our service part so busy is that we do primarily focus on larger companies that have multiple locations. So... it's always something around here. I mean, it's endless. So we don't really base our service work off of, what the PM techs find and, they are a little bit more green, our PM techs, you know, the goal is to hire them, train them, you hire them as a PM tech.

--- Type of work ends ---

MARIA

5:04 If they are green and train them, let them ride along with the more experienced technicians when they can go to train he to one day have them, you know, as a really strong technician. But if we focused on PMS, you know, we would be personally putting green technicians in the customers, and depending on them to sell and... to find something wrong with the PMS, they mainly focus on cleaning the equipment and pulling up that report, putting together that report for the customer. And they have gotten a lot better about finding issues and it leading into another work order. But I would say... that's not a bulk of what we do.

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

JOSEPH

5:58 Okay. Well, how are those repair opportunities documented in Davis way right now?

MARIA

6:06 Through work orders, is that what you mean like?

JOSEPH

6:09 Yeah. Is it like just in the notes of the work order?

MARIA

6:14 So, the process of when a work order is created, the customer calls in or either the technician finds another issue, we create the work order.

--- Assets ---

MARIA

6:23 We've got work order comments that have a bulk of like the customer's information, what broke, who called in, what their number is, what's a good time to service, that's where the work order comments go, which is on the first... tab of the work order is the first thing you see when you open it... that's where the call type and the problem and all that is.

--- ST app contracts and pricing ---

MARIA

6:45 And then there's other tabs for the notes and the timestamps and the POS that are attached to the work orders, any attachments for the work orders, the cost tab to see like our overhead versus what we're billing out to get the profit margin? So the work order, everything kind of flows to connect to the work order?

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

JOSEPH

7:11 Okay. I got you. But does it like notify anybody when something is found that needs a quote or is that just kind of stay in that? It's just, you find it as you're reviewing the work order?

MARIA

7:22 Yeah. So it's a, we work mainly out of work queues. And so we have dispatch that, you know, is obviously looking at the D board keeping communication with the technicians and the de board shows like whether they're traveling or they've started or suspended, whatever it may be. There isn't different colors or because it's color coded pretty much based on the process of the work order and where it's at. So there isn't different colors, I would say for like if it's a quote that's needed or a part order that's coming in... it, it's not that detailed. It's just more like have they started, are they traveling, have they completed it? So that's how the D board works. And then the dispatch, they monitor that and the communication. And then it's kind of manual. From there, I would say, I mean, they have to like, we have different queues that are assigned to different departments and different people and they have to keep up with those queues. And so I would say that that's definitely more manual.

JOSEPH

8:33 Got you. Okay. Well, that's something that ServiceTrade will be able to help kind of increase reporting on potentially, and give you more visibility into when things are showing up as well as are they getting quoted out quickly when it comes to the, yeah, go ahead.

MARIA

8:54 Well, I was just going to tell you what the work queues that's one thing that you're really depending on the employees because if they don't move it into a queue and then let's just say it goes out of all queues, you have to pull a report to see.

--- Paper process ---

MARIA

9:06 Well, do you have work orders that are just sitting that got taken out of all queues? Because somebody forgot to, you know, they took it out of one but they forgot to put it in the other one where the quote was needed. So that comes with a lot of, you know, holding them accountable and pulling the reports and making sure that the work orders are getting closed out and all that. So that is... I would say that's it's not very efficient when it comes to that. No.

--- Paper process ends ---

JOSEPH

9:34 So if it's a lot better if I say... service manager is reviewing a work order that's come back from the field and work order, everything looks good from their perspective and they need to pass it on to billing rather than manually moving it from my queue to their queue. They could just say, yes job is complete from my end and then it automatically goes into a queue for billing?

MARIA

9:57 Yes.

JOSEPH

9:58 Yeah, that's...

MARIA

9:59 Cool. But then where it, you know, where it makes them almost like because I know one issue we have with just an example that's you know, totally different.

--- Invoicing ---

MARIA

10:08 But like with COD work orders, you could put a customer in as COD for their net terms and Davis, where does not force the technician, you know, they could leave and never get a payment and then we have to Chase the money after because it, there's no kind of pop up or anything that says, hey, did you get a check, credit card number, cash?

--- Invoicing ends ---

MARIA

10:29 You know, select one. If you did, if you got to check what's the, at least the check number at the top for reference so that we then know, what to look for and what's coming in. So I would say that's where the accountability piece is very, it's very manual.

JOSEPH

10:49 Right. Okay. On the more on the service side of the business, what are the main things that Davis was leaving short right now that have you looking at other things and what are you hoping to see out to service trade?

MARIA

11:03 Well, one of them is definitely the COD. We don't focus on a ton of COD anymore because it is a lot of admin work. Like I said, you know, you've got a lot of technicians where if they don't have the accountability and nothing is making them collect or maybe they're not paying attention to the work order comments that say call the office before you leave to get a total... that happens a lot. So then they just leave, you know, they feel like their job is done and, you know, we're left to do the rest. So... that's kind of frustrating that, you know, what's the point of having net terms for a customer, if it doesn't really do anything, you know, I mean it does when it comes to the reporting side of it. Like it doesn't really matter with net 30 net 60. But when you're talking about COD and you've got that's your chance. You're in the customer's face, you know, to go ahead and get the money by the time they leave that percentage of getting that money really slims down.

--- Type of work ---

JOSEPH

12:10 What determines a customer to be COD for you all.

MARIA

12:14 So we base our customers on like an 80 20 rules. So our eighties are more like obviously, we work in a lot of the larger corporations where they've got multiple locations. And so they're typically net 60. So we primarily work on net 30 60 and 90 because, you know, those bills have to go through a process with their accounting team. But... where was I going with that?

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

JOSEPH

12:45 The COD stuff, is it just like the mom and pop shops that?

MARIA

12:49 Yeah. So, eighties in twenties. So our eighties are more like the larger corporations and they're very loyal. We consider them a loyal customer. They call us on a consistent basis. And so we just keep tabs of who is calling us. How often have they been calling us? How long have they been a customer of ours? So we've have some that have been with us since the beginning, which is over five years now. So we really base it on loyalty and do they pay well, do they pay on time? Do they complain a lot? Which typically, the ones that can plan the most are the ones that never call, right? And there are more of this... that we consider them at 20. So the twenties are more like I would say mom and pops or people that don't call that much. You can tell maybe they call us on the weekend when they couldn't get their primary service company out. We would consider that a 20 where it's just, no, it's not a consistent call flow. I guess you can say.

JOSEPH

13:54 Okay. I got you.

MARIA

13:56 So that's pretty much what we base our eighties and twenties on.

JOSEPH

13:59 And all the twenties are COD?

MARIA

14:02 For the most part, yes.

MARIA

14:07 Okay. For sure, a new customer would be at 20 because we don't know what their pay history is. We don't know what kind of customer they are. And so they always start out as a 20 for the most part. Unless they're coming in as a, like I said, a

larger... business and they've got multiple locations. They've got a good background then that's a little bit different and we don't expect them to pay COD because their managers don't have checks on site like that, but, a new customer, is going to start out as a 20?

JOSEPH

14:42 Okay. Other than the COD aspect of things, what are some of the other processes you're looking to improve?

MARIA

14:52 There were a few things that I had brought up?

JOSEPH

14:57 The glitches is what I'm seeing under problems.

MARIA

15:00 Yes, customer service. So, Davis were, when we first started with them. You used to be able to call in which I know that things have changed. And as they grow as a business, then they just, you know, probably can't handle the call. Can you give me one second? Somebody keeps trying to call me and I need to let them know I'm in a meeting. So I'm sorry, hang on.

JOSEPH

15:25 Just one second. No worries.

--- Invoicing ---

MARIA

15:59 Okay. I'm sorry about that.

JOSEPH

16:03 All good. So.

MARIA

16:04 One was the credit card processing.

MARIA

16:13 Process, I guess. And I don't know if I had left you with one either... but anyway, we'll go into the credit card processing. So right now, with davisware, we use square, which they don't integrate with davisware, which is fine.

--- Accounting integrations ---

MARIA

16:32 But like I told davisware, we have to work. I, it's like we pay all this money for davisware. We have to work with all these other companies which come with other bills which come with other contracts. And it's like... they just don't have enough that either integrates with them or it's just all, even if it does integrate with them, it's like it's just all separate. It's a separate contract. It's a separate Bill. It's more to keep up with it's. More more different people to talk to and it's just frustrating that you have the system, but they outsource everything. It seems like our GPS.

JOSEPH

17:12 Yeah, at least, if I, if it's gonna be multiple platforms, at least make them talk to each other so that they can operate as one and share information.

--- Invoicing ---

JOSEPH

17:22 So you're not double entering one amount in square stripe or whatever it is. And then another one in Davis square.

MARIA

17:31 Yeah. One is the credit cards. The GPS don't integrate with Davis. Where... what's another big one? There was one that I... just had. We do. GPS. Obviously phones are different.

--- Accounting integrations ---

MARIA

17:52 They're through verizon one talk. We use square. They want us to go with one pay, which is the credit card processing that integrates with Davis were, but... again, I got the GPS because they were supposed to integrate with Davis square. So they connected me with the company that we now use for GPS.

--- Invoicing ---

MARIA

18:15 They ended up not integrating. So it's like I told them with the credit card processing, I don't want to go with another company that I, you say it's going to integrate that. I'm gonna have to do another contract with have another Bill when I can just use square and we've been doing that. And yeah, it's aggravating and it's manual entry into davisware but, you know, at least I don't have to get into another contract with somebody.

JOSEPH

18:42 Yeah, their past sounds like it hasn't given you the confidence to go into that next credit card processing company. Confident? Yeah, that's frustrating.

MARIA

18:54 Yeah.

--- Invoicing ends ---

MARIA

18:54 And that happens. I mean, I would say that happens too often to where I feel like if you have a system where you know, that your customer is gonna need XY and Z, then why do I have to, for one? Why is it a different contract? And then two, why is it, different bills, different people I'm talking to? Like I don't want to have all these things. I want it to be.

--- Purchase decision ---

JOSEPH

19:20 Well, there's pros and cons to all of that. The all in one is ideally perfect if you can find something that can do everything you want all in one place. But it's incredibly sticky and hard to change down the road. So, like if at any point the truck tracking software you're using stops being the best thing for your business is the way we think about it is it's best to be able to just swap that out for another one.

--- Accounting integrations ---

JOSEPH

19:48 And as long as it integrates with your ecosystem, everything else can continue to run as it is. Rather than if you're on one platform that does everything, then you got to pull everything out and change over.

MARIA

20:02 Yeah.

JOSEPH

20:04 So, I understand where you're coming from, but if you go something like ServiceTrade, we will leverage our partners for things like payment processing and truck tracking. However, we do have really tight integrations with them so that, it operates as one but it is multiple platforms underneath... kind of like piggybacking off of ServiceTrade if you will.

MARIA

20:27 Okay. So would it be the same thing though that I do have different contracts, different bills... people that I communicate with. Okay. Yes. Okay.

--- Accounting integrations ends ---

JOSEPH

20:38 But we're happy to connect you with folks that are doing it like that now, so you can talk with other contractors that are living this on a daytoday basis. So you can see how it actually works from their perspective before going into any contract with us.

MARIA

20:52 Okay. Yeah, because that's, I understand too. You know, where the product is coming from too, where you guys want to make it flexible to the customer. But I, to me, it's a lot to keep up with. So.

JOSEPH

21:08 Yeah, it's also.

MARIA

21:09 Already have so many moving pieces.

JOSEPH

21:11 We want to focus our development efforts on where it is that we excel and that is work orders, quoting, invoicing, customer communication, things like that. If we go try and be the best truck tracking software and the best payment processor and all that as well. We're gonna lose focus of what it is that we do really well.

MARIA

21:33 Right?

JOSEPH

21:34 We have a limited amount of resources and our company, as you all do as well.

--- Accounting integrations ---

JOSEPH

21:38 So we try and say who's doing this well already? And then let's just use that information and intertwine our systems.

MARIA

21:46 Got it. Okay. Yeah, that makes sense. I mean, maybe if I had more trust in davisware then it would be a different story, but I was told, you know, that fleet sharp would integrate with davisware and this has been a couple of years ago now. And when I got an update on it, they were no longer gonna be integrating. And to me, that's frustrating like one minute, you're gonna integrate and I should go with this company and then the next, you know, they end up not right? And... I don't like stuff like that.

--- Accounting integrations ends ---

JOSEPH

22:22 No, that's kind of saying it's a done deal and then making you the Guinea pig without you knowing, right? We do have beta testing with some of our customers but it's the ones that volunteer for it. If you don't want to be the first one to jump off of a

cliff and see if you swim on the other end, we're not gonna be, we're not going to like push in without knowing if that makes sense.

--- Accounting integrations ---

MARIA

22:41 Yeah.

JOSEPH

22:44 The integrations that I've talked about, we have shoot, I mean, we have over 1,300 active accounts right now. Not all of them are using those integrations, but like there's upwards of 40 or 50 that are using all those integrations and probably even more on the payment processing side?

MARIA

23:02 Okay. When it comes to integrations, do you guys just learn like what the company like, what they're doing, where they're going. And then, you kind of give them the guidance as to, hey, I think you could benefit from this. And here's the information for this company or how does it work? So that you guys know what we need, and who we're going to have to connect with?

--- Accounting integrations ends ---

JOSEPH

23:25 Yeah. So, you can do it on your own. We can help you with that. It kind of depends on how you want to run it. If we see a need where one of our partners could be valuable, say, truck tracking, we are happy to make that introduction. We'll never do it. We'll never like say, hey, truck tracking company, reach out to them. You, you'd be a good fit. We would come to you first. And hey, do you want to be introduced to? So, and so I think they have a really good program for you for XY and Z.

MARIA

23:55 Okay. The other thing that... I have an issue with Davis, where is he? That's what I was telling you about before I walked away is the customer service. So in the beginning, we were able to call in. Obviously with COVID, everything changed and I, I'm sure it's a lot of staff to have, you know, the ability for customers, to call instead of just submit a ticket. The only issue that I have with the whole ticket is that let's just say you have an urgent glitch and it affects the whole process of how to do something or how you typically do something. And the answer you know, that I sometimes get is it's gonna be in the next development. In the next patch of development will let you know when it's released. Well, what does that mean? I mean, how long could it be before it's released? And what do we do in the meantime... because it can really affect someone's process of how they do things and that's per...

--- Access to information ---

JOSEPH

25:00 Is this on a cloud based system or is it on a server at your office?

MARIA

25:05 It's a cloud based system?

JOSEPH

25:06 Okay. Yeah. Usually rolling out updates is super easy for something like that or at least a bug. If there is a bug, it should be able to be fixed pretty quickly. At least on our end, it is... a.

--- ST app contracts and pricing ---

MARIA

25:24 Yeah. It just depends, on the issue, but I've had it take months.

JOSEPH

25:32 What are some of those issues that you have?

MARIA

25:34 So one of them recently that took four months was the burden rates for the work order. So being able to see that overhead, those overhead margins reflect on the work order profitability, so that we can kind of counter that in with the profit margin for each job.

--- Parts management (inventory) ---

MARIA

25:57 So that took a long time for Davis were to fix. Gosh. I mean, I could go in, my, some of it is with proper.

JOSEPH

26:08 Too far down that rabbit hole that.

MARIA

26:10 Yeah, some of it is with parts and inventory... duplicate line items on work orders.

--- Tech On-site ---

MARIA

26:32 He didn't wasn't generating the check PDF.

MARIA

26:42 At one point, you couldn't view the previous notes on the work order. So the technicians couldn't see like if another tech was there prior and a different technician is going back to finish the job, and they couldn't see what was done before. That was a big issue.

--- Tech On-site ends ---

JOSEPH

27:00 And are these things that were common across the whole platform for Davis? Or is it just your account?

MARIA

27:08 That I don't know. They don't typically tell you if it's like normally, I can tell if it's common across Davis where if they say there's a patch in development and we'll let you know when it's released.

--- Purchase decision ---

MARIA

27:21 Then that will typically tell me that there's a bigger issue. But they do, they won't tell me if anybody else has been having the issues. Now. I did have a meeting with them... a couple of weeks ago or before the holiday and let them know all of my concerns and that I was meeting with other providers to possibly make a switch... because of the issues that we had had.

--- Accounting integrations ---

MARIA

27:51 And they did tell me that I wasn't the only, we weren't the only ones that we're experiencing glitches because they rolled over into vision two point O, which is a different... I don't know what the it's not a different program, but it's just an upgrade to the program that we had before.

--- Accounting integrations ends ---

MARIA

28:10 So they were getting rid of vision one point O and adding some new features in a different layout and stuff for vision. And so that was vision two point O. And since that's been released, there's been quite a few issues. I guess since it was released that they didn't expect to happen. So that's been a work in Progress too.

JOSEPH

28:33 Right. Okay. Well... with the other companies you're looking at, have you thought about or do you have like a list of criteria in which you're making this decision on what's most important? Have you prioritized any of that?

MARIA

28:49 So, what's most important is the customer service. Obviously, the credit card process mainly the integrations and what's because right now, it feels like we're on there's a lot of admin work that goes into what we do because everything is, does feel so manual... and like I pay for an extra feature with Davis where it's like their designer feature and it, it's in a totally separate like when I open a system that's got all my information in it, then I should be able to have like an admin dashboard that's right there. When I open it up. Obviously, not that everyone else can see, but as an admin, I want to be able to see an overview of whether it's graphs or it's late or quotes, been sitting there for a long time like past a certain amount of time there should be able, O, I should be able to set different limits for different departments. Like I don't want to quote to sit there for longer than three days before somebody has made a note on it or commented on it or call the customer or something like that. So I wish it was, O... I wish it worked more for us to hold people accountable in different departments than it a, right now, it's very manual. And, and when I say manual, it's going through those queues and auditing those queues, one work order after the other, looking at the dates, looking at it. If anybody has made notes when's the last time a technician has been there. So everything I has to be dug into a.

--- *Purchase decision* ---

JOSEPH

30:30 MM, HMM. You got to have eyes on it to see if it's a problem. You can't let it just bubble up.

MARIA

30:36 Right.

JOSEPH

30:37 Okay. All right. And out of curiosity, what are the other software platforms that you're taking a look at as a replacement?

MARIA

30:45 So, the only other one that I have... seen a small demo for, but I haven't reached out to them yet is called BuildOps.

--- *Type of work* ---

JOSEPH

30:56 Yeah.

MARIA

30:57 Are you familiar with that one? Yeah, besides you guys that's the only other one that I am interested in.

JOSEPH

31:06 Okay. Cool. Yeah. Well, yeah, we run up against them quite a bit. They're a little more on the project side of things. They're out of the west coast where we really got

started on the service, recurring services and reactive service work side of the business. So that's more of our bread and butter and we're right here at a rally so close by.

--- Accounting integrations ---

MARIA

31:28 So when sorry, go ahead.

JOSEPH

31:32 I was just gonna ask what sort of ERP system you're using on the back end. Is that all in Davisware or using like Quickbooks or something?

MARIA

31:38 It's everything is in davisware... yeah.

JOSEPH

31:43 So, that'd be another conversation to have is kind of what you want to be your accounting system. ServiceTrade. We handle all the service operations, but we are not an accounting system. Likely Quickbooks would be all you need because it's essentially you need a ledger for arap, things like that.

MARIA

32:00 Okay. We've worked with Quickbooks in the past... but we haven't obviously, we haven't done that since we got into davisware because davisware has that piece, not that it's the best... but I mean, I'm not against, you know, going back to Quickbooks.

JOSEPH

32:20 What was your experience with Quickbooks? Did you like? It, was it simple?

MARIA

32:25 It's a lot. It's a lot more simple than, Davisware, Quickbooks. The only thing about Quickbooks being simple is that it's is you can easily make a mistake and it's not as hard to fix it, which I guess could be a good and a bad thing with davisware.

--- Accounting integrations ends ---

MARIA

32:45 If somebody makes a mistake, then there's like three or four steps to get it back to where it's supposed to be. So that can be frustrating, but it can also be a good thing because with it, it's less room for error. I guess you could say.

JOSEPH

33:01 Yeah. Okay.

--- Purchase decision ---

MARIA

33:03 So, I don't mind Quickbooks, but I don't know we just haven't used it in a long time?

JOSEPH

33:09 Right. Okay. And as far as timeline for making a decision and making a change, have you thought about when would be the ideal time for that? Or is it all just kinda up in the air at this point?

MARIA

33:22 So, I would say it's kind of up in the air but we are in January and I know for sure that I don't want to make a switch come summer, spring, summer because obviously, that's when things start getting a little bit more hectic and there's just too much going on to try to learn a new software, and do all that.

--- Purchase decision ends ---

MARIA

33:44 I know for sure. I wouldn't do that. So I would either have to be, you know, and even for it to be for the winter, you know, early spring, it would have to be a very swift... change. I would preferably like, I would have liked for it to have been in the fall winter but, you know, we're here now and I don't know what Davis war is gonna do. They know where I'm at and the issues that I'm having. And they do know that, you know, I am looking at other software. So obviously they don't want to lose us, as a customer. So I know they're trying to, you know, make the changes that need, to be, but it's like I told them. I mean, I think that we have grown the way that we have because we do keep up with technology and we do try to make sure that we're giving customers, you know, the things that they want because that's what we're here for. But if your software is working against you and it's you know, you've got to hire all these people just to do a small task, then that's not productive and, it's not providing the best service for the customer either.

--- Purchase decision ---

JOSEPH

34:59 Yeah, absolutely. Okay. Yeah. So are you trying to, you think and maybe make a decision before summer and then implement after summer? Or kind of see what, see how everything's going now, then see how the summer goes and make a decision of do we stay or do we jump after summer?

MARIA

35:19 Yeah, I would say, yes, I would rather kind of see how the summer goes look at my options, make sure that, you know, we're making an informed decision because I know it's gonna be a lot of work when we switched over to Davis where we were on ServiceFusion and that's where we did all the work orders and quotes and stuff.

MARIA

35:42 And then we were on Quickbooks for the accounting and invoicing part. And so getting into Davis ware was a lot like getting all of our parts, our customers and all of that data merged into davisware. It was a task because we didn't know, we didn't hire anybody from davisware to come in, and do it all for us or to do any of the training and stuff like that.

--- Accounting integrations ends ---

MARIA

36:11 The training was virtual and it was kind of like get into the system, see what questions you have let us know. And then we'll go over them. So for a long time, we didn't even know all the things that davisware could do for us. I'm sorry, my daughter said.

--- Accounting integrations ---

JOSEPH

36:26 No worries.

MARIA

36:28 We didn't know all the things that Davis war could do for us and that's a little frustrating to you're. Paying for a system and you're not even using it to its full extent, right? But it was because the training wasn't really fair. So it was a process that we'd really like to not do again. But if we have to, we will because that's just what we have to do to keep it going.

--- Accounting integrations ends ---

JOSEPH

36:51 Changing software is never easy. And anybody that says otherwise, is lying. Yeah, we try and make it as simple as possible. But you're essentially uprooting the entire operating system of your business and go into something new. And on the other side, it should be better. And usually with service rate, it is a whole lot better, but it's that whole process is definitely not easy.

MARIA

37:17 Yeah. Just thinking about the technicians. I know that they're gonna hate it because they really don't like technology as it is. And then you're changing it all for them. And so that's gonna be, I have to be 100 percent before I make a move that, okay, this is gonna be what's best and they might not like it.

--- Access to information ---

MARIA

37:40 They may not like it now, but in the end, they're gonna thank me that I did it. So I'm gonna, you know, before I make a change, it's gonna be 100 percent that I know it's the best move to make.

JOSEPH

37:51 Our mobile app developers, their whole goal is to get the technicians using the mobile app, the little at the least amount possible because you wanted to be able to get in document what they need to and get out so they can get back to working on things because they did not get into the trades to be monkey punching on their phone, they got in it to just actually be fixing equipment. So.

--- Access to information ends ---

MARIA

38:14 Yeah, that's true.

JOSEPH

38:16 Okay. Well, we have a couple of options on how you wanna tackle this from here. I can give you a good highlevel overview of ServiceTrade right now. I also like I have, I gonna be in little Washington on Thursday morning and I can pop down to newborn on Thursday afternoon.

--- Purchase decision ---

JOSEPH

38:31 If you're open and want to do a real more of an indepth, dive into ServiceTrade. I'd be happy to come by your office and spend like an hour and a half with you going through it from start to finish. Or we could do it a little bit now and schedule a follow up meeting, whatever you think is best.

MARIA

38:48 Yeah. So, if you want to just show me a general overview now that way when we do meet and, we can do an more in depth version in person. But so that I have an idea of some things, you know, by the time we do meet, I can bring you some more questions that I may have.

--- Purchase decision ends ---

MARIA

39:05 And that way it's not just like, you know, one and done where I'm like, gosh, I forgot to ask this and that and it's a lot of back and forth.

JOSEPH

39:14 Perfect. Yeah. So I'll go ahead and share my screen here. I'll slide over. I'm gonna skip these slides. Essentially, this walks through kind of, the technician shortage that you all are experiencing and how more and more Czechs are leaving the workforce every year. And then it goes into really what service trades focuses are

traditionally software has been really focused on helping you control costs by setting people up for success the first time and setting technicians up for success so that they don't have to run to the parts house again or things like that.

--- *Customer engagement* ---

JOSEPH

39:45 So that's a big focus of ServiceTrade. But one of the places that we really separate ourselves from our competition is we're really focused on helping you grow that profitable customer loyalty by sharing the pictures, the videos, the repairs that you might, or, the headaches that you might have saved them from. We have a lot of online customer engagement features so that you can share all the good work that you're doing back with your customer. And we have a big focus like we were talking about earlier on those service agreements. If you can get the service agreement to go out and clean the coils and do the basic maintenance on a quarterly basis, your technicians might be able to see more repair opportunities and drive more of that high margin pool through repair revenue and do it in a way that it's more predictable so that you can say, hey, in the next two months, this part is probably going to go bad.

--- *Type of work* ---

JOSEPH

40:39 Why don't, we go ahead and quote the customer out and if they say yes on replacing it, then we can plan that repair rather than doing it on a night or a weekend in an emergency.

MARIA

40:49 Yeah. I will say one reason we haven't and maybe the reason we don't focus on PM agreements as much is because that's one thing that Davis were lacks to is there PM like the way to set up the PM and just the whole process for PM agreements is not user friendly.

--- *Paper process* ---

MARIA

41:12 I will say that it's difficult. And so that makes it difficult to wanna sell and do more because it takes a lot of time like the system is just, no, it doesn't keep up with them that well. It's it's just a lot of again manual things that I feel like we're against instead of four and really drive that area forward. It's it's a pain.

--- *Paper process ends* ---

JOSEPH

41:41 Yeah. Well, it's something that we can go into in detail likely another time. But I, I'll show you the ServiceTrade side of things. So we have, this is ServiceTrade app, dot ServiceTrade dot com. This is the operation system. And then if I go right here, we have a system called Northboundary, so, it is two distinct platforms.

--- Recurring maintenance ---

JOSEPH

42:04 One, this one is for new business sales of projects and maintenance contracts. So a salesperson could go out, scan equipment and generate a proposal, and get it signed and then get that maintenance contract and from there into ServiceTrade to go deliver it. This is really what we'll focus on today. So that makes it easy to go sell the new contracts. And then once O, once you have ServiceTrade, let me just pop open cosco corporate headquarters here. Once it's in ServiceTrade. This is where you deliver on it. So I've got my, I've got a company here with all my locations underneath it.

--- Assets ---

JOSEPH

42:41 And if I click into cosco in wilmington... it'll pull up this location at each location, we can keep up with assets. So hvac unit, refrigeration systems, make model, serial number, refrigerant, type, belt quantities and sizes, all of that. And then if I click into that, I'll be able to see this RTU, I'll be able to see all the information on that RTU as well as the services that are tied to it.

--- Recurring maintenance ---

JOSEPH

43:14 So let's see. I don't have these on a recurring interval, but I can make these recur so that it's on a quarterly basis. Have this quarterly PM pop up on this to you with estimated price and duration on it. I can also have me back up to the location page. I can look at it for the whole location here. This is what I wanted to show. So I can have that recurring interval on it. I can also have a preferred technician on it. So if I want the same tech to go out every single time, it can automatically assign them to that job. And then I can have the window in which it needs to get done. So if it's a whole month to get it done or a year or a specific week or a day or whatever it is. You can keep up with that there.

MARIA

44:01 Okay. That's awesome.

JOSEPH

44:03 Yeah. Then you can just run a basic report to say, all right, show me everything I have to do next month and generate all those work orders at the same time.

--- Assets ---

JOSEPH

44:13 But since we're tracking everything on a per asset basis, you'll also be able to see work orders broken down per piece of equipment. So I'm underneath this one RT you here or warehouse American standard super chiller. I can see all the invoice information just for this one piece of equipment.

JOSEPH

44:31 So if somebody is spending 15,000 dollars a year servicing a piece of equipment that may cost 20 and you want to go try and sell them a PM agreement because one, it'll get business for the new install team. Two, it'll take some of the chaos out of your business of dealing with all those emergency service calls. You have the data here to really back up going and selling them that new system.

--- Assets ---

MARIA

44:58 Yeah. That, that helps. I would say for callbacks too if you us, if they call about a particular unit and they say it's a call back and you want to look back and see well, how often do we schedule or have we worked on this? When's the last time we were there, then that's an easy way to pull that up.

--- Deficiencies ---

JOSEPH

45:19 For a large commercial property, it's not just looking back at the location, it's looking back at this specific piece of equipment that the technician was working on it. And we'll go one step further. We have things called deficiencies in ServiceTrade. So, the technician in their mobile app, click on deficiencies, and they can document one to say, hey, we have a bad compressor out here. They can put a status on it of new fixed or verified. So even if it's something that the technician fixed while they were out there, we still highly recommend documenting it as an issue to show the customer. Hey, this is a problem that we found. We went ahead and fixed it. You don't need to worry about it really communicating the value of what it is you're doing. But when the technician documents it, they can take pictures as we... but they can take pictures, audio memos, videos, all that straight from their mobile device. This sends a notification to the office, to an account manager, a general mailbox, you can send it to multiple destinations to say, hey, this problem was found. It needs to be quoted out. So they can click on the link from the e-mail or you have reports where you can say, all right, show me all of the... all the deficiencies that are more than two days old. Then you can be like, all right. Who got this notification? Why is this not quoted out? And you have that accountability you were talking about earlier, we can even create dashboards so that stuff does bubble up to you. So you can say, all right, I just, I need to know all of my deficiencies that are out there. I don't need to go run a report to find it. I just want to see it right in front of me.

MARIA

46:56 So, to document a deficiency, does that take the technician actually carrying? Hey, I want to document this deficiency or like, do technicians, do you see that they really use that piece or is that part of filling out the work order or like, how do you get them to do that?

--- Tech On-site ---

JOSEPH

47:15 Both. So we can make it required to where, when you're clocking out of a work order, it has a thing that says, did you find a deficiency on this job? If you say yes, then it documents it or you have to manually say, no, I did not find an efficiency on this job.

--- *Deficiencies* ---

JOSEPH

47:32 The other thing that you can do that really helps is make some sort of incentive plan for these technicians. A lot of people don't do it because there's no way to really track it. But this will track who reported that deficiency. That deficiency turns into a quote, which turns into a job which gets approved and it's very simple to track all right, how much revenue is coming from the deficiencies reported by J. So you can say, all right, well, you get five percent of all deficiencies reported. Don't, don't report things that are made up problems. But, we want you to be really thorough when you're out there on a job site because we want to save our customer from future issues in future downtime and be that really valuable contractor for them.

--- *Deficiencies ends* ---

MARIA

48:18 Yeah. Okay. So we use Xoi right now. I don't know if you're familiar with Xoi, but it's not really that it, you know, tracks efficiencies or anything like that, but it kinda reminds the process. I guess kinda reminds me of Xoi with like holding the technicians accountable with, you know, there are certain questions that you want the technicians to fill out and they have to and they have to include pictures and, you know, documentation and that's what goes out to the customer. But again, Xoi is... another, you know, company that we use that is outsourced. So... you knowing Xoi and what it does, and then what your system does, would you say that we would be able to get rid of Xoi with your system?

JOSEPH

49:09 The vin diagram of ServiceTrade and xi overlaps a lot.

--- *Assets* ---

JOSEPH

49:13 The main thing that we don't do that they do really well is the kind of the, do you all use the repair manual side of things where a technician can like look up a repair manual or videos on how to diagnose issues?

MARIA

49:30 I don't know is that within Xoi?

--- *Customer engagement* ---

JOSEPH

49:32 I think so. Yeah, from what I've heard.

MARIA

49:36 I don't know, I know our main focus of xoy is to... get a report to the customers where they can see those pictures and make sure that the technicians answer certain questions and, the videos that they can do that's our main focus with the.

--- Customer engagement ends ---

JOSEPH

49:52 If that's what you're use an Xoi for, then we, a, we can take all that responsibility because essentially, I'll just jump into this job right here and show you what this looks like. I think this will be a good example. So we send what we call a service link.

--- Tech On-site ---

JOSEPH

50:12 So this will land in your customers inbox. It can have the appointment that was completed. The services will be either the, hey, we repaired this or we diagnosed this or it's a PM that we took care of it'll. Show attachments. So PM checklist onsite customer signatures, pictures that were taken as well as deficiencies found.

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

JOSEPH

50:36 Hey, there's a bad compressor out here. You're gonna get a quote for that. So all of that can flow to the customer right here and you can send that straight from your ServiceTrade account. So this is a completed job. I can just click send service link. The other option to get to that, I'm gonna jump over here for a second.

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

JOSEPH

50:57 This is our customer portal. So we can embed this into your website. So, ardvark services is our fake contractor website and you can have a login where it has e-mail address and password section. Your customers can go there with their e-mail address and password that you, I, you give them the capability to log in or not.

--- Tech On-site ---

JOSEPH

51:20 And they can see what jobs are going on at their locations today, what's coming up and what's been recently completed. So they can just click into a job. Let's say this one right here and they'll see all the pictures, the attachments, the deficiencies, all the documentation around that job.

--- Tech On-site ends ---

MARIA

51:38 Okay.

JOSEPH

51:40 Also access to the invoices straight out here so they can click on that. And for those larger customers, they can go in and somebody in their accounting department is probably going in to see that they can see what they're paying for. Of course, we can display that pricing however they need to, and you can build it into their contract.

--- Invoicing ---

JOSEPH

51:57 So if you're working for CVS, all of their pricing needs to be displayed like this, but another customer is grand total, only you can build that into their contract. So it happens automatically. And then we have pay now functionality so that they can pay with credit card or ach, that is through a third party. It's called a, but essentially, it's a plugin. We just had to partner with somebody to code in the payment processing piece of this, but we can create rules around it. So only certain customers can pay online. There's dollar threshold. So if it's over 2000 dollars, you can say no credit cards allowed only ach, that sort of thing. And then the real value of invoicing out a service trade is if somebody in the accounting department gets this invoice and they don't really know what was done, they can click on this, go to service details button. Right here. It takes them right into the pictures, the videos, the everything that was documented about the job.

MARIA

53:02 Okay. For that particular work order for that particular invoice?

JOSEPH

53:06 Okay. That's exactly right.

MARIA

53:08 Okay.

JOSEPH

53:11 Well, how?

MARIA

53:11 Do the fees for like if somebody can pay card and let's say their Bill is on the higher end, obviously the fees can really get up there with credit card processing. So how do those fees kind of trickle down? Do they, you know, is it, would it come down to us or is it like a set fee that we're charged every month? Or how does that typically work?

JOSEPH

53:34 I can give you an article on the fees. They're pretty competitive, just credit card rates from what I understand.

--- Pricing ---

JOSEPH

53:39 So it's like in the two percents. So a lot of our clients will say like, hey, if it's like I said, under 2000 dollars, it's not worth my time to go chasing that down. Let me just make it as easy as possible for them to pay. So I get paid quickly. Now, if it's a 10,000 dollar invoice, yeah, let me make ach, the only option there.

--- Parts management (inventory) ---

MARIA

54:01 MM, HMM. Okay. And then how does that journal entry then get input into the system? Is it like does it automatically do it because you've got that fee that's gonna be intertwined in that? So do the two systems merge to where when a payment is made, that it automatically creates journal entries?

--- Invoicing ---

JOSEPH

54:20 That's a great question that one might be a bit over my head. We essentially create the invoice here. And then that invoice passes over into Quickbooks or Sage or whatever ERP system that you're using.

MARIA

54:38 Okay. That's right.

MARIA

54:43 Okay. So... okay. Just trying to figure out because you're you've got three systems there that are working together. So I didn't know how the integrations really work and, you know, to what extent I guess... that it does because I'm assuming that your system does... create general entries into Quickbooks, right? If they integrate?

JOSEPH

55:16 I don't know the exact lingo on it. So it creates an invoice that gets passed into Quickbooks. And I think once that passes into Quickbooks, then that essentially creates that journal entry.

MARIA

55:29 Okay. Yeah. I would be interested to know kind of what the process is after this after, you know, your system has done everything then. How does he... how does the integration kind of, you know, fall into place? Yeah. And what, you know, what things, would we be responsible for making sure that they're in Quickbooks for reconciliations and stuff? And then... what your system does?

--- Invoicing ends ---

JOSEPH

55:58 Huh. So I've got a video that walks through that I can send you. But what might be more helpful? We have a lady named Diane who works with us. She actually was one of our customers. She was the controller for a customer down in Texas. She had to move and was looking for a remote job. And she's used ServiceTrade with Quickbooks and with Sage as a customer. And so we hired her on to help us navigate those waters and talk those talk through those conversations with clients. So she'd be a great resource to kind of just think through. All right. How is this all pushing over? What does it actually look like that sort of thing?

MARIA

56:38 Yeah. Okay. Yeah, that would be good. Just so I can see how the two integrate and how much work is it gonna be for us? You know, if certain things don't integrate, then what does that mean for us or what would that look like for us?

JOSEPH

56:51 Right. What, what pieces?

--- Invoicing ---

JOSEPH

56:53 Well, I think that when it will show it as like paid in ServiceTrade, if it does get paid, but then you do have to mark it as paid in Quickbooks. Even though the invoice comes over little things like that.

MARIA

57:05 Okay.

MARIA

57:10 There was something else that you were going over that I was gonna ask you about as you were doing that process.

--- Deficiencies ---

JOSEPH

57:18 And here was it back when we were like looking at that quoting piece... because I was gonna show you how to build out a quote real quick.

MARIA

57:30 I don't remember maybe it'll come to.

JOSEPH

57:31 Me?

MARIA

57:33 Yeah, it was something else, but it's all right. It'll come to me if it's important.

JOSEPH

57:37 Okay. So from this deficiency here, I'll show you how we build out those quotes and send them to the customer. I can just click well before I click add to quote. One of the useful things I can look at is the deficiency history. So I can see which other technicians have been documenting issues on this same piece of equipment.

--- Quoting ---

JOSEPH

57:56 Looks like there was a bad compressor four days ago, seven months ago, 11 months ago, all documented by myself. But if you're quoting this from the office, you can quickly see what's going on before creating a quote. Maybe it's a larger issue. We want to get a more experienced tech out there to get to the source of it rather than just sending random quotes out.

--- Quote templates ---

MARIA

58:17 Okay.

JOSEPH

58:19 I can click, add two quotes and create quote... and this will create a quote from that deficiency. I can then apply a quote template to fill out the rest of the quote. So I can say, hey, we have a compressor replacement with this description, these standard parts in labor, add it to that quote.

--- ST app contracts and pricing ---

JOSEPH

58:38 And then I can go in and edit things as I need to. So if I need to go in and say, I'm actually going to charge 180 dollars for this. I can do that, flag it and say, hey, contract price based on the markup rules you've set up in service trade is 156 25. Those contract rules can be set for a group of customers for a specific customer or even down to a specific customer and type of work. So, if I have a contract just for the PMS or just for the repairs for a specific customer, I can have those pricing rules automatically apply as well as how I want the detail displayed to the customer.

MARIA

59:21 Yeah, because we can set up rate sheets for each customer, but it doesn't flag if like let's say they are a PM customer and they do get that contracted price. Yeah, you can set it up on the rate sheet. But if something changes or somebody changes something or, you know, whatever may happen, then it doesn't flag them.

--- Dispatch ---

MARIA

59:42 Hey, this is not their contracted price. Yeah. So we've had that issue before and then you have to credit them for the difference and it's...

JOSEPH

59:49 It gets messy. Yeah. And on top of that, you can, with the different job types and ServiceTrade, you can have service calls, emergency service calls, urgent service calls and have different pricing structure for the different types of calls.

--- Dispatch ends ---

JOSEPH

1:00:03 So, the faster you need us there, sure, we'll get there as fast as you want, but you're gonna be charged more for that if you want to think about it that way.

MARIA

1:00:11 Yeah. Okay.

JOSEPH

1:00:14 So once we add that pricing, we'll be able to send this over to the customer.

--- Deficiencies ---

JOSEPH

1:00:18 I can just toggle your contact information on. I can toggle pictures and videos on or off as I see fit. So if the technician took a really useful video on the rooftop of the horrible noise that the system was making, that might be really useful in getting that quote approved.

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

JOSEPH

1:00:34 So I can have that embedded into the quote when it gets sent over. And then do you actually have access to your e-mail right now?

MARIA

1:00:42 I did.

JOSEPH

1:00:43 You don't mind opening that up? It should show up here in a second. And then you can go and look at it and click approve for me. And I'll show you what that looks like. When it comes back. I think one of the real, one of the most valuable pieces of it is we make it easy to approve. With one click that big green button. It's a couple of clicks actually, but you click the green button, check terms and conditions and

approve the quote. I can also make a po required to be able to approve that quote. So the customer has to type something into that po line in order to approve the quote?

MARIA

1:01:17 Okay. So if a, I may have missed it, but if a customer is going in and they can approve the quote, then does it require them to give any information as far as who it is that's approving the quote?

--- *Deficiencies* ---

JOSEPH

1:01:33 Great question. If you approve the quote, I'll show you what comes back. You capture that automatically.

MARIA

1:01:39 Okay. Let's see.

JOSEPH

1:01:41 And then we'll also have the pictures and the audio memos embedded in the bottom of that quote. So you can click on it and actually see a good high resolution picture of the problem I have here.

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

MARIA

1:01:56 Okay. I was just reading, what you guys have. So it looks like you can put the description of what the quote is for. Okay? And then just go in and approve it.

JOSEPH

1:02:11 Yeah. Did you click view and respond?

MARIA

1:02:15 I click here to view details, approve or request changes to the quote.

JOSEPH

1:02:19 Can go, yeah, you'll go in there and then you'll see the web page pop up where you can either approve request changes and then the pictures I was talking about is down there at the bottom.

MARIA

1:02:29 Okay. Do you mind if I click request changes just so I can see what it looks like when I click that?

--- *Quoting* ---

JOSEPH

1:02:35 Yeah, absolutely. Yeah, for.

MARIA

1:02:40 Okay.

JOSEPH

1:02:42 So, when I click refresh on my screen?

JOSEPH

1:02:50 A, did you click request changes on that?

MARIA

1:02:52 I didn't I just approved it.

JOSEPH

1:02:54 You approved it. All right. So if you clicked request changes, I'd get an e-mail about, it would go back into a draft stage and then it will drop a comment on that quote of whatever changes you requested... since you approved the quote. Can you see my screen again?

MARIA

1:03:11 I'm trying to get back in it. I'm not, no worry. Savvy. I guess. Okay.

JOSEPH

1:03:20 That's confusing. I can be in it all day every day and it still trips me up. So I have a full history of this quote. If you requested changes. One, I'd get an e-mail two would go into a different status. So I can keep up with any quotes that are in that draft or changes requested status... but I can see from here, you viewed the quote and from what IP address, and I can see, when and where you approve that quote, time stamp, IP address, all that?

MARIA

1:03:50 Okay.

--- Quote templates ---

JOSEPH

1:03:53 From here, I can either create a new job from this quote or I can add it to an existing job. So if I want the diagnosis and the repair to be on one work order, one invoice, I can have all that compiled together or say, I'm going out there for a PM next week, but we just got a little compressor replacement or a capacitor replacement approved, we can just tack that on to an existing job and roll one truck, one work order for those technicians.

--- Quoting ---

MARIA

1:04:21 Okay. So my first question would be because what we do right now, we used to not do it this way and we changed it probably about a year ago because since COVID, you know, people really let quotes sit there. And so we would have it all in one work order where, you know, we've got the diagnosis up there and then we sent them a quote for the, you know, the repairs and it would all end up being on one work order but they would like it's like you've got that diagnosis money that they owe you sitting there. And then if they don't approve, it could be months. They could totally forget about it. And if you don't have somebody that's like on those quotes, making sure they're calling customers. And, you know, that things are getting approved or denied or whatever it needs to be to keep the work order moving along, then you've got just that you've already paid your technicians, paid your parts supplies or whatever they did on that diagnosis. And then, you know, it's just kind of sitting there until they either approve or deny. So we started breaking up the work order to where the diagnosis is on work one work order because that's work that's already done and we want them to go ahead and pay it.

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

MARIA

1:05:35 And then, we do a new work order for, you know, we do a quote and then it can turn into a work order if it's approved, but it is gonna be a different Bill. So how does that work to where you don't have that happen? Like if you did want to add it to an existing job... how would you do that if you've already build the customer or does it not allow you to build a customer?

--- Quote templates ---

MARIA

1:06:00 If you're gonna do a quote?

JOSEPH

1:06:02 So you can go ahead and build a customer for half the job and then add it back to that same job and then do a second invoice on that same job.

--- Quoting ---

MARIA

1:06:11 Okay.

JOSEPH

1:06:14 You can also do it the way you're doing it now and just create different jobs. But I think that there are a couple of things that we do that'll help increase the speed in which those quotes are approved. One of those is you can set a recurring kind of like distribution of quotes to say, all right, this quote expires in 30 days, resend it every three days until resend it once a week until it either expires or gets approved,

whatever happens first. So it just continues to follow up for you. So you don't have to worry about it. The other thing you can do is you can come into quotes here. This is your quote reporting page. And since I'm tracking things like those views, I can say, all right, show me all my quotes that have been sent to the customer and viewed by the customer that are not yet approved expiring at the end of this month, I can run that report and that's probably things that they've looked at, but maybe they open that e-mail and it's out of their brain now and they're not thinking about it. I can just bulk, select all of those and resend them to the customer to get it back at the top of their inbox.

MARIA

1:07:24 Wow. Okay.

JOSEPH

1:07:25 The data around how many times it takes two or three times seeing a quote to get it approved, is wild and making it as easy as possible to just be top of mind every few days a, makes a big impact on those quote approval rates.

MARIA

1:07:41 Yeah. And we have somebody that manually goes through the awaiting approval queue as what we call it and has to follow up. And there isn't, a history. The only history that you get and davisware is timestamps and that's technician timestamps. So unless somebody changes a queue or completes the work order or whatever within the office... the history part that you sent me where you can view that, you can see that the customers viewed it and all that we don't have, that kind of those kind of features. So.

JOSEPH

1:08:19 Nothing's going to ever fully replace calling a customer and following up with them. But this makes it say that you're much more impactful with that.

MARIA

1:08:28 Yeah, as the person.

JOSEPH

1:08:29 Who's managing that queue? They can set up notifications so that they get notified when people are viewing quotes. And if it's one that they've been waiting on a big one or something like that. And they get the e-mail that says, hey, so, and so at costco is viewing your quote, what an opportune time to give them a call?

--- Quoting ends ---

MARIA

1:08:46 Yeah.

JOSEPH

1:08:48 No. You're looking at that right now? No, no way.

MARIA

1:08:52 Yeah. Well, and it is consistency too. If you're depending on a person, then maybe they won't follow up every, you know, once a week and they'll accidentally let two weeks slide by and they haven't you know, done it yet.

--- Quoting ---

MARIA

1:09:05 This kind of it does it for them, but it makes sure that, they do it and that they follow up on it and you can see if they have.

JOSEPH

1:09:15 Do you know what yours close rate is?

MARIA

1:09:18 I don't...

JOSEPH

1:09:19 Think.

MARIA

1:09:20 I don't have a way to track that right now.

JOSEPH

1:09:23 I got you about how long do they take to go from being sent to being approved?

MARIA

1:09:28 That is a will question because he's more in the... sales side of it because we consider the quotes more sales because he is, you know, calling them and making sure that they're approving it or kind of where they're at with it. If they're not approving it, then, was there another option that was better? You know? So he kind of handles that stuff. So I'd really have to get that data from him.

JOSEPH

1:09:57 Okay. No worries. But yeah, regardless, it sounds like we'd make, a solid impact on the speed in which you can get these out approved back into the office and go actually perform that work.

--- Customer engagement ---

JOSEPH

1:10:10 And it's a better experience for the customer because they can view it the way you did or they can view it from this customer portal. They can see all of their quotes across all their locations in one spot.

MARIA

1:10:22 Yeah. So in order for them, like when you do send them the quote and you had to click that button or the link, do they have to be set up in the portal to be able to view these things online? No? Okay.

--- *Customer engagement ends* ---

JOSEPH

1:10:36 Yeah. So that's one of the unique things about ServiceTrade. All those quotes come in the same format as right here through the portal, but it's being sent separately only if you give them access to the portal, can they access it through this page? All the pages are the same though it's just how do you get there? So like a property manager that has 10 locations with you, let's make it easy on them so that they can come to this one list and run through their five quotes rather than looking back in emails and searching and not finding what they want, trying to make it as frictionless as possible to do business with you.

--- *Accounting integrations* ---

MARIA

1:11:14 Yeah. So speaking of portals then, because we do work with quite a few different portals. Now, it's another thing that since COVID, it seems like that's what more people are moving towards and unfortunately, they a lot of times move towards a different portal than somebody else. So we've had to learn a few portals, but none of the portals integrate with Davis where it's... you know, it's all manual entry into these portals, which I understand because portals are very new. I feel like, so... does your system integrate with any portals at all?

JOSEPH

1:11:56 Yeah. So we have integration with what is it service channel?

MARIA

1:12:00 Yeah.

JOSEPH

1:12:01 A lot of the other ones don't allow for integration, which is frustrating. We have open API's so we technically could integrate with anybody that allows us to integrate into them. But then it kind of becomes all right. Well, is the juice worth the squeeze? How much is it gonna cost to develop an integration there? I think the service channel one, honestly, it's kind of expensive.

--- *Pricing* ---

JOSEPH

1:12:20 All the development that has to go into is like 10,000 dollars annually. What is that worth it? If it's about? I don't know 10 hours of work a month. I don't know. And it depends on who's doing that work. Is it somebody like you doing that work or are you hiring some sort of intern or something like that?

--- Accounting integrations ---

MARIA

1:12:41 Yeah. So service channel, which that's good because, we have a few customers on that one. What about Korea?

JOSEPH

1:12:51 Not that I know of if they allow for integration, I'm happy to go down the road of looking at what it would take to build something out... because it's easy to get the data out of service trade. It's how does it go into the other system?

MARIA

1:13:05 Right. Okay. Yeah, those are the two that I would say we use the most. The other ones aren't a huge deal because like Darden, they use a portal, they use coupa, but they really do it more for the billing side and to keep up with all the invoices and the managers can approve the invoices. So we pretty much have to, you know, take the data from the invoice and just put it into their system. They don't really send work orders through portal or anything they call in. Still. So theirs is not a huge deal. But like with cargo and service channel, you know, they do everything through their portal and then obviously, we do everything through our system. So it's like double entry, you know, the updates and the pictures and the invoices, and, you know, the communication, a lot of that is through the portals and that's where it gets kinda, you're doing it in one system and then you're doing it in another too. So.

JOSEPH

1:14:07 Right. How much are your businesses through those third party portals?

MARIA

1:14:15 I would say at least 50 percent.

JOSEPH

1:14:19 Wow.

MARIA

1:14:20 MM. HMM.

JOSEPH

1:14:21 Okay. So, yeah, it might be worthwhile, to look at that service channel integration then?

MARIA

1:14:26 Yeah, because it's the bigger it's the bigger companies that use them because they've got so many different locations and it's just easier for them to keep up with everything in one portal. So that's where we see it is. It's it's always the customers that have multiple locations.

--- Accounting integrations ends ---

JOSEPH

1:14:45 Yeah. Okay. Well, probably need to land this plan for today. I do have a 145. I'm gonna have to hop on. Okay? But overall, I mean, we kind of we touched on a lot of different pieces of ServiceTrade. What are, what are your thoughts at this point?

--- Quoting ---

MARIA

1:15:05 I mean, from what I've seen, I think that it looks... a lot better than what we have right now especially when it comes to holding other people accountable that's probably, the biggest thing is like the automatically send in those quotes every few days to the customers, seeing the history of what the quote has gone through and who's viewed it and all that.

--- Quoting ends ---

MARIA

1:15:28 That's something different that we don't have right now. And one thing that I would like to really dive into next time we talk is what does it look like? You know, for may that are holding multiple people accountable in different departments? How does the system work for them to where they can kind of see an overview of, okay, I've had these invoices and billing that have been sitting here for, you know, I don't know, 48 hours and it should have been billed out within 24 hours. What is going on? Like those kind of things? I'm honestly not sure if any system does that. And if yours does, I'd like to know but just different pieces to kind of help hold the different departments accountable when you've got so many different moving parts.

JOSEPH

1:16:16 Okay. Yeah. It sounds like that needs to be a focus of our next conversation as well as some of the service channel stuff. I can go into more detail there. What we makes sense for us to reconnect. Do you want to do something next week? What, what does your availability look like?

MARIA

1:16:37 Yeah. So the next one, is that gonna be the one that's more in depth where you would come in person or?

JOSEPH

1:16:44 I can do that. Yeah, if that works best for you or we can do something in between? I mean, it's only what an hour and a half drive down there. It's not bad.

MARIA

1:16:53 Are are you gonna come from little Washington or Raleigh?

JOSEPH

1:16:56 I'd come from rally actually, just remember, I do need to be back here about six o'clock on Thursday night. So that may not work on Thursday. Well, it might work if you could do something at like... one 30 on Thursday, I could make that work.

MARIA

1:17:14 Yeah, I can do that.

JOSEPH

1:17:16 Okay, perfect. Well, I'll shoot you an invite for one 30 Thursday. What's the address you all's office?

MARIA

1:17:22 It's two zero five south gleburny road. And that's glenburnie and it's in new burn.

JOSEPH

1:17:34 Right.

JOSEPH

1:17:41 Cool. Well, yeah, I'll shoot you an invite for Thursday one 30... and meet you at your office. In the meantime, I'm gonna show O, we use a thing that we call recaps to really house resources during people's evaluations. So I'll make a new one real quick.

--- Implementation and ongoing support ---

JOSEPH

1:18:06 See.

JOSEPH

1:18:11 I'll tidy that up in a second. But essentially, what this will do is it'll have all the different... tabs over here on the left hand side, so you can look at ROI resources onboarding resources, next steps, things like that. So I can check these two off real quick.

--- Tech On-site ---

JOSEPH

1:18:29 So, since we completed that, but I'll go ahead and put like Quickbooks information in here, service channel information in here, all the different resources that we talk about so that it's easy to find all in one spot. And then if you have any questions about something, you'll have my contact information to call me your e-mail me or you can also just make a comment on something and it'll notify me as well.

--- Tech On-site ends ---

MARIA

1:18:51 Okay. Cool. Yeah, that'll be good.

JOSEPH

1:18:54 Awesome. And so for our meeting Thursday, I've got Quickbooks integration stuff to cover dashboards.

MARIA

1:19:02 Definitely PM agreements.

JOSEPH

1:19:05 Agreements. Okay. And reporting sort of stuff. So we can also go through the mobile app. We'll we can sit there and click through it on my phone together as well.

MARIA

1:19:19 And that is what the technicians will see, right?

JOSEPH

1:19:22 That's correct? Okay. And the service chill. Cool. That sounds great. Well, I'll send you access to this here probably later on this evening. And then I'll see you on Thursday.

MARIA

1:19:41 Okay. Awesome. Thank you so much.

JOSEPH

1:19:43 Thanks, Maria. Have a great afternoon.

MARIA

1:19:45 You too. Bye.

JOSEPH

1:19:47 Bye.

The End