



# ServiceTrade/Welldone Mechanical - Tasking Conversation

Lauren Rice with Welldone Mechanical  
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## Participants

### **SERVICETRADE**

Lauren Rice

*Director of Enterprise Sales*

Ben Evans

*Solutions Architect*

### **WELLDONE MECHANICAL**

Sean Gross

*President*

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# Transcript

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LAUREN

0:00 Is it going?

SEAN

0:01 Not too bad. Not coming off of a, coming down from a sugar high from last night?

LAUREN

0:09 My God. I didn't do it. I watch people trick or treating. I'm on the street below, but I didn't I don't think I had a single piece of candy... by design now.

SEAN

0:24 Just because you miss that from around the other way, you don't even that you didn't burn the calories to build and Halloween candy.

LAUREN

0:31 Now, I'm usually, I usually don't have a sweet tooth, but... my family is the type that will have dessert after every meal, not just like dinner. So like I try to like piece it out, but yeah, I did work out yesterday, so it wasn't bad at all. Hey, Ben.

BEN

0:55 Good morning.

LAUREN

0:56 How's it going?

BEN

0:58 So great. You guys like to start early? Okay?

LAUREN

1:02 Well, it's eight 30 we're Shawn is, and mine, I have another seven. Sorry, I'm sorry?

SEAN

1:10 You, are you six 30? It started where you are?

LAUREN

1:13 Yeah, yeah. It was just because it's simply had no other time. So we're a fairly... but yeah. So I fill Ben and I met last week and then I know he and the solutions architect team of which then part of I'm so, sorry... have listened to our previous call, reviewed the documentation that you shared. So I was gonna let Ben kinda run this call and kinda John learn a little bit more about your concerns from your perspective. I know he has some questions for you, my gosh. And yeah, I'll let you, I'll take it from there. How does that sound?

SEAN

2:04 Satisfied. Cool.

BEN

2:09 Righty. So... so let's start off with a couple of those questions. So, have you and bear with me. Have you guys done the actual the service forms, demo? Apologize for not having to look that up first thing this morning.

LAUREN

2:28 Yes, we did last week or the week before. Yeah.

BEN

2:33 Okay. Yeah. I thought that you know, some of the things that you seem to be asking about were some kind of how the processes can get set up in here. I mean, tell me about a little bit about what your operation is doing today or what you're hoping to gain by adding service forums to service trade?

--- *Customer engagement* ---

SEAN

2:55 Hi, adding service forms to serve the, what are we looking to gain to you? If we use service trade or your service forums?

BEN

3:05 Well, both, I mean service forums is an extension of and it's a part of it's just it helps enhance. So your service techs in the field have something they can engage with.

--- *Forms* ---

BEN

3:17 When, whenever they're doing in sort of inspection or process that you're having to do the doing the field. It just helps them do that a little bit better. Put that right in front of their faces to checklist that generates a nice output PDF for the customer to see, you know, it, being able to integrate with all the details that they're pulling out of that inspection report as far as the asset record goes, gets shared over into service trade and vice versa.

--- Paper process ---

BEN

3:42 But it's handy way to kind of set up your processes for what the text are going to be doing in the field.

SEAN

3:48 Yeah. So with service trade the softwares, because we're on paper. So it'll just eliminate a bunch of inefficiencies does that paper create after your forms? That's where the gap is in terms of their significantly?

--- Pricing ---

SEAN

4:03 Not as detailed as what we're currently using? And so that, and so the forms is what we want to talk about because just from a high level, you guys have six or seven or eight forms whereas we work on 20 some pieces of equipment. So, you guys already for us, there's already 12 more than 50 percent of equipment that we would normally service that you guys don't even have a form for.

--- Pricing ends ---

SEAN

4:30 So that's number one and two. If you were to what I would call a template where you guys are calling form. If you had a kids unit which does heating and cooling, you would, you know, what we're used to is you have a template and has 110 100 tasks on it, you know, 100 check marks to forgot to go through if you need to do.

--- Pricing ---

SEAN

4:52 But of those 100, you don't need to do them each quarterly visit. In the first visit, when it's a major Cooley, new would do tasks one to 40 and the next minor. Cool. We're just going there for a basic filter change and something else you're doing, you know, maybe one to 10 and then 41 45.

--- Forms ---

SEAN

5:14 And then when you have a major, he, two of those are completely different set of tasks you do. Then 45 to 85. And then the minor heat. Again, you go back to that one to 10 and five, the whatever numbers that I use. So, whereas you guys have a form and it's the same form every visit when it really, you know, depending on how that form is built, you don't need to do all those tasks every visit... okay?

--- Quote templates ---

BEN

5:42 So I'll address a few of those things there. So I can kind of understand where you might think that the firms themselves are a template and they are a template of sorts. We do have what we would call some actual templates in the system and templates might be for creating your recurring services, being able to structure out what's going to be included in the service either by, you know, labor items and those types of things as well as parts of materials.

--- Forms ---

BEN

6:12 Just so it's kind of like templated for that particular job. And so that's one thing we can walkthrough in the forums arena. Those can have logic in them. So, I know you've been working with paper and that's a very one dimensional aspect of things. I'm going to digital gives it a little bit of an edge. But we also can put logic behind that. So the logic it allow you to say, for instance, if we had a PM checklist where seasonally, you may do on that piece of equipment, different things in one season or another. You can have logic so that when the technician is firing that form up in the field, he can say what season it is. And from that selection, it will only show which questions he needs to be doing that particular season. So it is specific to the equipment. But also you can program into it a certain questions set by the, by virtue of just picking what season or any other type of selection option.

--- Forms ends ---

BEN

7:11 Sometimes that might be for, you know, various types of feel like eating in whether it's a natural gas or electric or something like that. You might have some different steps based on that even though it's still the same type of it might be called a split or rooftop packaging it, but it's still you might have different heat methodologies there. So.

SEAN

7:33 But I was hoping you could possibly show me because the form we looked at the most in terms of the different seasons you're referring to was agree at which template it was. But it had template for I don't know package unit or something where it had heating and cooling season. So it had two templates but the tech would have to then, you know, scroll through. So what you're referring to assume is what I was looking for in terms of you would click what season it is and it would take you to, it would funnel out X, whatever tasks you don't need. But that's not what we were kind of.

BEN

8:09 Yeah, I don't have a form that's going to be, hey necessarily that way but let's try this. Let's actually here. I'm gonna share my screen.

SEAN

8:19 And, and just to be clear, we're on a software except there's not a mobile software. So we have a very refined, very specific tasking that comes from a

computer that automatically generates tasks based on the season and tells us.

--- *Paper process* ---

SEAN

8:36 And then we just in this, when I say paper, I mean, it prints out and then we write on it on paper versus it being automatically transmitted to, you know, personal digital device. So.

BEN

8:51 Okay. Understood I mobile app here, clicking out of this job.

BEN

9:01 All right. So what I was going to show you actually here, this is... our device magic.

--- *Forms* ---

BEN

9:07 So we partnered with a group. It's this device magic company that actually builds the app that becomes our form in the field if you will. And so what I was gonna show you here is kinda the logic that goes in behind this. So as a service forms customer, you would be able too get access to this dashboard. So this is an addition to the service trade system which I'm sure she's not gonna integrate links. Lauren is to show you that. But as far as the service forms go, when we build a form, it will show up in here. So we do have some of our, some of our kits that are in here. But because I don't think we have one that's gonna show a seasonality to it, but I'll go into how that gets dealt with. So go into the actual questions.

BEN

9:59 And let's see if I can pop into here officially just group. So these are the questions sets that come with the actual form.

--- *Assets* ---

BEN

10:15 Patient manufacturer, model, serial numbers, pretty straightforward stuff here.

BEN

10:26 Well, these are think of them like fields. So if you, if your equipment has a barcode that you want to capture or any other thing like I'll make model serial number, you can capture that information and some inspection forms, people want to have, you know, various details captured and some don't so it's you know, it's basically the flavor of the month, whichever you know, whatever works for you and your business.



--- Assets ends ---

BEN

10:48 So what do you, what do you want to keep track of in your asset records? But the at, but capturing the barcode might be something in the fire and safety world. It's a lot more common to have a lot of smaller devices on a premises like think portable extinguishers, emergency lights.

--- Forms ---

BEN

11:04 And so those might be bar coded so that when you're walking around the building trying to do inspections, you might just go up and scan the barcode and find it in the list of assets because they might be dealing with, you know, potentially 50 to 100 or more different of those devices on premises.

--- Assets ---

BEN

11:18 So that barcode becomes handy for that. In the chemical world, I met some sure, you know, where whereas those kinds of things come in handy. But there might be scenarios where they do. So you might have multiple units on a rooftop. And as they walk around, they just might want to scan that barcode. So it pulls it up in the list. When this form gets dispatched... to the technician in the field, all of the assets at that location will show up in a list of things he can Inspect. Actually programmatically. You can program it to do either all of those assets that are the same asset type, or just the one that's identified in the job itself.

--- Forms ---

BEN

11:55 So you can have those two options of how that form gets dispatched. And then you could use barcode. If there's multiple ones in that set, you could use the barcode to scan. And so he doesn't have to scroll through this at the find the exact piece of equipment, exact asset. He can use the barcode is actually search for it.

SEAN

12:10 Hi, this barcode that comes with the lights on generated dark though that service trade app or you need to get another app to create a barcode. It's what was the existing on that piece of equipment or whatever you're scanning?

BEN

12:25 Technically, it can be any of that there, you know, it's not limited. So you can manually, you know, just basically generate your own numbers as long as they're all unique. That's all that matters, you know. So whatever that ends up being where they use it, you know, an app in the office to kind of generate those barcodes and print those off.

--- Assets ---

BEN

12:44 Are you by a set of barcodes that are preprinted and as stickers and plan or tags and somehow, you know, put them on the equipment or just use the manufacturer. Is one if it's still if it's visible enough that will be sufficient again as long as it's unique to, you know, there's no other, you know, barcode in that asset list in your system that, that's going to match it.

--- Assets ends ---

BEN

13:03 So that's fine. But, you know, lots of these questions that are in here and trying to see have one that we can get to. So this group here, imagine that this group section, you could be the users as... well. It'll be a good thing. But I wanted to go to these questions.

--- Forms ---

BEN

13:26 If any of these questions you can have with that, that's required, yes or no and you can do it only when and that only went rule. Would they only when a certain question was answered a certain way. So imagine at the beginning of the inspection again, let's season? Is this or, you know, is this a heating or cooling into? What type of fields that on or is, are those types of kind have... workflow forks in the road? You can set that question at the beginning. And then every question that follows, it can have some conditional logic about, hey, if you answer your question a certain way that this question and gets answer or prompted or not and it can become invisible and hidden. If a questions are asked to circle or answer a certain way. So you can have that kind have again out of 100 questions, maybe only 30 to 40 of them get presented based on, you know, the way our question was answered previous, like... it's very similar to the way we capture deficient he's here is the deficiency late may or may not be triggered or potentially may or may not be required. One of the pieces of logic that we have in here is something going to be required. So is this question required again? It might be always. So there's always required but only when you know, a certain thing is happening. So if they answered, you know, a know if it's a yes, no question or a pass fail. I answered it as a fail. So if anything is, you know, set to a fail maybe that. Prompts them to do that deficiency entry right at that moment instead of waiting till the end to do comments when they might forget, you know, by the end of the inspection, what little things may have been done.

--- Deficiencies ---

BEN

15:02 So they can capture those deficiency details, you know, put the description and take a picture of something right at that moment just because they answer your question, no, or fail or somehow some degree less than passing and sufficient.

SEAN

15:20 Hello, can somebody like me go in and add things and they're the, that lower section?

--- *Deficiencies ends* ---

BEN

15:27 Yes. So as access to device magic, you can go in here and make some minor changes and some of those minor changes might be changing the order of things. So if you realize that, hey, after doing a few of these in the field, the order of the questions may not be as comfortable as your guys like to see it. They may want to rearrange that. So you can have the order of the questions done a different way. You can certainly just, they're just as easy as just drag and drop them into a different location. You can also add and remove questions. But there's a little bit more steps to that.

--- *Forms* ---

BEN

15:59 This is just simply just taken an get it out or that there can be depending on the questions. But as far as anything that's not being shared with service trade is something that you can add or remove anything that's part of that device record like the unit number manufacturer, modern, anything that's going to be shared back with the main service trade system as a data point that take some programmatic effort on the back end to actually make changes there. But the rest of the inspection questions of, did you check this? Did you check that? Taking measurements of things? Those are the things that are not stored in the asset records. So there certainly something you can make modifications to.

SEAN

16:37 Yeah. So if I wanted to put on there... you know, clean blower wheel.

--- *Forms ends* ---

SEAN

16:46 Like what I could do is go in and create that or adapt to set up a meeting with somebody to write that in.

BEN

16:54 No. Something again, a task step, you can certainly just do that yourself just dragging... you know, if it's like a yes, no, that if you've done something like you just said. So let's say I'll just go to the end to just pop it in at the end just so I can see what, how that works. Just pop it down at the end there, you would type in, you know, what your question is, what we say clean.

SEAN

17:17 Yeah.

BEN

17:19 And it's a yes, no question.

--- Quote templates ---

BEN

17:22 You can add in enhance, you know, what is the subtitle to that? You know, you can add in kind of an instruction of, you know, make sure you check this or that while you're doing this particular step, you know, all those things are fine. It'll just show up in the output report as another line item that was done. Typically, you might add that to the group or it makes sense. I just pop it in at the end so I can easily remove it. But yeah, as you can simply do that, hit the save button and it's there. It'll show up in the output report.

SEAN

17:52 So essentially, what that function, we could create all of our own templates.

--- Quote templates ends ---

SEAN

17:58 We could create our own tasks if you will. For if we don't you know, we want a different than what you.

BEN

18:05 Yes, yes, yes. And we do have, while we have standard forms that are basically, it's a starting point for, you know, if you didn't have something already, it's a good. It's a good place to get started. They're very inexpensive to implement. Deploy also an expensive from a resource standpoint, we can get them ramped up and deployed pretty quickly. So that's a starting point if you wanna make changes to those. Certainly, we build custom forms all the time, a little bit more so on the mechanical side because there's really no standard, a regulation that is set by, you know, a regulating body like there isn't the fire safety world.

--- Forms ---

BEN

18:39 So we do a lot more custom forms and mechanical all the time. And we, you know, again, you know, building some logic behind the scene. Something might not be quite as obvious into what you may need. But, you know, we can certainly doesn't hurt to ask and see, you know, weren't certain things certain ways that these things need to be. Hey, we can do that. Okay?

BEN

19:04 Yeah. So yeah, I think the big picture here is quite feel so locked in by, you know, the templates that we had or the standard forms that we had it. And the way that those are presented, there is a lot of flexibility of what can be done both and the output design, you know, branding it, making sure that it's got your logo, your

identifiers up there. You know, how that page gets laid out. Those kinds of things can be done as well as, you know, how the questions are performing behind the scenes and how that logic it's built into it. So there's a lot that can be done here. Is it's actually rather powerful?

SEAN

19:43 So, have you then have these, this checklist we're currently looking at now, how do you identify when one shows up in may versus in November?

BEN

19:55 There you go. Alright. So well again, when you said, you know, if we had that question up here at the beginning of the loop here to say, hey, what season exists?

--- Purchase decision ---

BEN

20:04 And based on that answer, you know, only certain questions in here would be presented based on if they answer was a season or be season or say whichever. And, you know, you would identify out of your list of questions. I want these. And I think you had the sheet that I think shift Lauren shared with me had a list of questions where some of them were, you know, basically applied to one season or another, one 190, they block or another. That, correct? That sounds familiar.

--- Purchase decision ends ---

SEAN

20:32 Like those service trade farm we looked at?

BEN

20:35 No, no, no. The one I think that you presented to her, do you guys have like a master form that shows like all the questions that could possibly be done on a piece of equipment. But yet you have the grand showing months out of the year and which questions get done based on which month?

SEAN

20:50 Correct. Yes.

BEN

20:52 Yeah. So think of it the same way you think of, you know, one form could have, you know, 100 questions on it and you know, only 30 might be presented at a time based on what type of season it is or what type of function you might be performing. You know, whether to that one season and perhaps, you know, one... you know, one type of function. You wanna do certain functions by date. So, you know, somewhat different, not just seasonally but, you know, I don't wanna get into the complexity there. It's just, you know, what those possibilities are there's a few things you can do this little piece here is also something that you'll get access to but probably never have to touch much.

--- Forms ---

BEN

21:32 This is what we call our dispatching module. So based on... the way the job gets setup in service trade, this will apply. It just, this tells the vice magic which form gets applied to the job. So this is what we call our dispatch roles. This is the form I was looking at here is this H back PM checklist. So if we pull into that one and look at our dispatch rules, this one is set because it say, because it's a demo, we don't have it with too many limitations, but these are the kinds of things you can set for form to dispatch. So you've got options here, you know, what types of jobs you actually want to have a particular form dispatch on.

--- Accounting ---

BEN

22:14 And then further criteria and all of these would have to match. If you put something on each line, all those conditions would have to match in a particular service line. This would be like think of it like an, or statement. But each of these individual lines would be and statement.

--- Type of work ---

BEN

22:31 So all of these conditions would have to match done a multi select zone. It would, you know, be service lines that are H back, HP HP AC are, or any other service lines that you want to apply here. You know, might be a part of that. It can be a, you know, customer specific.

--- Recurring maintenance ---

BEN

22:47 So you can type in, you know, one type of customer or different customers in there, any of your regions or offices that you've got them designated in service trade. And again, job types and service trigger description, we typically stay with these or down into asset types. So, you know, those are typically the standard goat twos, but any of these will work.

--- Access to information ---

BEN

23:10 And so once those are the fine. And then the job gets dispatched or gets assigned and service trade... when the technician in the field clocks in using our mobile app this far, but just automatically dispatches to is fun. So that meets all those criteria and the job itself and service trade.

--- Forms ---

BEN

23:28 And it gets the right form that's how the right form shows up and from that point, you know, then you can make further selection to actually make the form, you know, do what needs to be done for that particular job. Okay? But again, most of this gets kinda set up as a one and done, it's rare that you would come in here and make many changes after, you know, after this is set up, you know, you might come in and make a change, several change here or there. But that's kind of area I would see you more likely make more changes to your forums, adding questions, are moving, questions, rearranging things and kind of getting this, you know, in a way that makes sense. Yeah. So I think the, you know, the changes might get made there. One more thing I can point out here. Let me go back. Yeah, we don't need it.

BEN

24:19 It's when you do get a form... there are multiple outputs, multiple PDF things that we can do. So we automatically, when the job is done... a PDF gets applied to the job, a PDF of the output. So once that's applied to the job, you know, that is basically visible are available for the customer to see.

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

BEN

24:42 You can also send it to them, you know, via email as a PDF. But if you're using the service links option that's something that they'll have access to that, you can also set up an email addresses. So, you know, if you want that PDF to get emailed, you can certainly set those up in here.

*--- Forms ---*

BEN

24:58 So automatically, as soon as a report gets submitted by the tech in the field, it could get, you know, emailed into like say an email account that you guys have set up in the office there just to receive certain PDF for certain ways. And you can have rules set up on those mailboxes to do certain things with them. Once they come in, they forward out to distribution or, you know, just kinda get stored in for easy searching to find this PDF reports, you know, via an email account instead of having to go and look up jobs and look at various things. So there's a few other things here that you can do, you know, with these forums, I'm... trying to think of some other options that, you know, that we can talk about just the capabilities with the forums, but go on from paper into device magic is a really big leap that I just want to make it pretty clear there's a whole lot that goes on here that you know, you'll have access to and it'll probably take you a few months to really get your head around at once. You're you know, on board with it. So before you can really start to see the horsepower behind it, but it's you know, the way that we're integrated with device magic, and the way things are fairly seamless. It's there's a whole lot going on.

SEAN

26:10 Okay.

SEAN

26:15 And I said the device magic is the, whatever other software app company you guys are working with to bolt on with service trade to provide this section.

LAUREN

26:26 That's...

BEN

26:27 Correct.

SEAN

26:33 Okay.

LAUREN

26:35 That was a lot more technical detail I was able to share with you. Is this answer most of your questions Sean?

SEAN

26:45 Yeah. I guess it would just be kind of scheduling like you talk about. The technician, answer the question on when they go out and identify what tasks they should do or limit it reduces instead of 100 questions that reduces it for the 20 or 30 this policy based on the time of year.

--- *Forms ends* ---

SEAN

27:03 How does... like we don't like for example, September, it's still warm here but fall and winter is just around the corner. So how does the techno that he's busy supposed to be doing stuff for the heating section? Is he doing stuff for the cooling second?

LAUREN

27:21 How would they do that now? I guess.

SEAN

27:25 Already know that. Now... again, if you look at that sheet I gave you that is setup by the operations manager has, so it as the 100 tasks on it for the whole year. And then they identify which month... that task is going to be performed. So in this case, you would select all the getting passed for September.

--- *Forms* ---

SEAN

27:47 So September would generate, the technician will get it printed off document that Ben had, you know, check, heating check, gas check, you'd exchange and take them through change builder, verify, you know, whatever eating stuff they wanted.



And likewise, and like the previous months, they would have had it set up. So when do generated, they would have all cooling tasks on it.

*--- Recurring maintenance ---*

LAUREN

28:11 Does your question, how would the tech know what like selection to make based on what month Aaron is that?

SEAN

28:20 You guys, I don't know how the scheduling works, but I assume you set up the tasking interval or the maintenance interval to generate automatically on a certain month and with X amount of assets that are supposed to be touched.

*--- Recurring maintenance ends ---*

SEAN

28:34 And then the technician gets dispatched to that site. They see the assets as opposed to, do they see that they're supposed to be there in November? I guess now, and then they click on the asset. And then they asked, they get asked that first question of, you know, what are you doing here? And they have to then pay what they're doing. So.

*--- Forms ---*

LAUREN

28:58 Ben, would that be able to be one of those instances where you could put like the hint under the question? Like I know for the California forms, for instance, they like reference the code under each section. And I'm guessing that's like a hint. So I think if you put for each section, like heating, major heating, minor, cooling, major calling minor.

*--- Forms ends ---*

LAUREN

29:19 And then just like the month that does apply to in parentheses, surely I don't wanna, I think you shortly, the tech would know what month or in.

BEN

29:31 No, not even just that it's you know, the, I think ask them the question at the beginning of the inspection to say what season or weekend is spring, summer, fall, winter?

*--- Forms ---*

BEN

29:41 It could be that simple where they select what season it is. And based on that selection, only certain questions are going to be even visible for them in the form. Like, so again, out of 100 questions, maybe only 30, there might be some overlap, 30 to 40 questions that would be done depending on which season they are in. And when they make that selection of a spring season, only this questions identified as the spring service are going to be presented to them in the form it in the inspection form on their app. So there is logic in the form that does that automatically. In addition to that.

--- *Forms ends* ---

BEN

30:14 I think what we're talking about here, primarily correct me if I'm wrong here. But it sounds like, you know, creating service templates is kind of what we're talking about. So, you know, in addition to that, you can create a service template and give it a name and call it a spring packaging, it... service... select your line.

--- *Assets* ---

BEN

30:40 It's called and spoke with HP AC. And then your description here, you might put in what you want them to be able to do or see or be reminded of doing at the spring packaging, it surfacing. And so you would, you know, put in whatever those items, those checklist items need to be logged into like these little brackets. So it's kind of sets it off but, you know, check belts.

--- *Recurring maintenance* ---

BEN

31:19 Or replace filters and you can go on down the list right... down here. You can put in what your prices for that service as an estimate of how long it should take. Is, you know, is it being done, you know, as a one time or is it annually puts a spring service that would be annually?

--- *Quote templates* ---

BEN

31:37 You would do one of these for each of those seasons, come down here and put in whatever labor items you wanna add in here. Any parts items you want to add in here. So it's just kind of saved in the template. It doesn't mean it's the only items that will get applied. It's just that if you're starting point. So when you go to create this job, all of these items are in here and all you have to do is pick from the list of templates, spring, packaging that service and it gets and it just shows up on the job.

--- *Assets* ---

BEN

32:01 So these are the things that the technician would have access to through the app is just being able to see everything that's listed out here. And so you could do that, you know, for all of your all of your asset types, if you want to. If a customer has something specific that a certain customer wants or certain contract agreement that you have in place, you could do the same thing where make making this service contract, customers specific instead of generic for all customers.

--- *Quote templates* ---

BEN

32:26 It could be, you know, that this customer has their own search service templates that you're going to apply based on the agreement that you have in place with them and what level of service they they've chosen. So you can create these templates here. And when you go in and create a job, when an asset let's say. So I got a customer. Well do this first. So... these are service companies that have been created. So again, this is what somebody else has put in here and built this for air compressor, competitor, equipment. There's your checklist for 50 dollars hour and a half or the labor and parts are going to be using there. I just want to go to put that on a job that's what is just going to show up automatically? I don't have to retype any of that stuff. It's just brings it right in.

SEAN

33:14 So why would they have it that way versus the checklist that you just showed me where you drag and then type it in and stuff, why wouldn't that be?

--- *Forms* ---

BEN

33:24 They may not be using the service forums. So service forums or an add on it's not, you know, not everybody use it or they may not use it for all of their equipment types. Not all of their customers may want to have a PDF out, whatever report for what got done.

--- *Forms ends* ---

BEN

33:37 So, so they may just want to have, hey, did the service get done? Yes or no? Just send me a Bill, just say you did it. They may not need something as formal as a nice pretty report that says we checked all these items. This is what we found.

--- *Deficiencies* ---

BEN

33:50 If we found any deficiencies, we're gonna, you know, put that in the report as well. Certainly it's still captured efficiencies on a regular job without having the service forums piece of it. And, you know, those get captured with descriptions and pictures and those get sent out to the customers as well.

--- Deficiencies ends ---

BEN

34:09 But in a form, it's a very formal, you know, presentation, have a PDF output to show, hey, customer. These are the things we did here's. What we found in terms of description, you know, any issues that way that we found out. And so it all is this nice and tidy.

--- Quote templates ---

BEN

34:23 It's a nice presentation for the customer. But, you know, there might be some pieces of equipment or some customers where that's just not required.

SEAN

34:30 Okay. So you're saying what you're showing me now is just pre generated pre-created so then any future customer, you could just click air compressor and this is what would show up.

BEN

34:43 Right. When you go to create a job. So if you go to one location.

BEN

34:52 And go to add a job for them... service, to look for... services, I could select any one of these services that might be potentially do or create a new one using a template. So that was the air compressor.

--- Quote templates ends ---

BEN

35:15 I don't think we have an air compressor on this particular building, but let's just say it's at the building and all of those things that were included, it just brought right in here, turn 50 dollars an hour and a half. I don't have to type into that stuff.

--- Quote templates ---

BEN

35:27 Then I can select my technician, put me in here. Go ahead and schedule that for today. Hey... what does it expecting that I'm not having in here?

LAUREN

35:42 You need to save the service, that you just create an... yeah... and then select that survey.

BEN

35:54 Where did I put it? Where does it pop up?

--- *Quote templates ends* ---

LAUREN

35:57 Yeah... you may not have a job. He may not have a job type.

BEN

36:05 Right there we go. We'll call it service call.

BEN

36:16 So there's our job. There's our checklist... since I am associated with it. See bear with me just a minute here. See if I can broadcast my tablet here.

--- *Access to information* ---

BEN

37:02 Just some clean up here. I'm on mechanical account and so much work on the fire lately. Let's see. It should show up here at the bottom. Here we go. So there's my job. So this is the mobile app, which is not the forums. This is the service trade mobile app, which is really where a lot of the action happens as far as the job is goes. So I can clock in on that job, I can show the details first.

--- *Recurring maintenance* ---

BEN

37:30 So when I clicked on service, that's showing me all of the details that again, we're just entered in a matter of seconds, all that's in there... and you can have the services very, you know, understand once the services are generated in here against each customer, they can be put on, you know, on the schedules and not schedule in terms of think about, you know, scheduling for a specific day or time, but scheduling for a spring season, summer, fall, winter and on, you know, some sort of internal, you know, those if it's seasonal like that, maybe it's only two seasons for that customer. They get a spring and fall. Each of those are going to have an annually, well, once you put in a date for the time, the last one happened within 12 months, you're gonna get an alert that the next one's do. So we've got in the system here... service opportunities which basically shows the list of upcoming services that are do based on the frequency that you programmed in.

--- *Dispatch* ---

BEN

38:28 It just shows you all the jobs that are kind of ready to be scheduled for the upcoming, you know, period upcoming 30 days, 90 days. What have you, and you'll be able to see them all list based on the last service that was done, if it was a fall, you know, we're in the fall season today.

--- Recurring maintenance ---

BEN

38:42 So there's a fall service that was done in November last year. It's going to show up is coming do for this month, this year for the same customer. And all you have to do is from the list here, just select it and add a job. You know, it's all kind of pre programmed in. So, you know, on the early stages loading into service trade, there's a lot of upfront. It's gonna feel kind of painful for all or things that you have to put it in. But once it's in here, this thing just kinda runs on autopilot. Is there's a lot of stuff that happens, a lot of automation that happens behind the scenes whether it's you know, scheduling upcoming regular recurring services or, you know... generating jobs pretty quickly without having to, you know, Ricky everything and from scratch, it's just a whole lot of, you know, basically repeat rinse and repeat from the last time.

--- Recurring maintenance ends ---

SEAN

39:31 Okay.

--- Forms ---

BEN

39:42 So, I think, yeah... between your service forums having that kind of logic that you can put in there in your form so that you're going to do certain things, you know, also as a backup plan of having the, or just go to step back to this job... you know, having those surface templates in here so that level of detail can be captured and saved so that you don't have to do it again.

--- Tech On-site ---

BEN

40:09 You know, once it's in the system, it's always gonna be there. You know, service trade is really designed to try to bring that efficiency out and optimize, you know, the amount of effort that it takes to do anything. So, you know, once a job is completed in the field, just to give you, for instance, let's say I'm a clock in... on this particular job and I'm gonna clock right back out. So, I'd say that everything got done on this.

--- Dispatch ---

BEN

40:41 So now, if the technician I have clocked out, so this was showing a scheduled here, I'll have to do refresh my screen. And now... this, the appointment is completed, it doesn't mean the job is completed. It means they appointment is, you know, within the structure, I can add other appointments or service to this particular job. So think of a job really is more of a container of anything that's in here. You know, I can have multiple services, mobile appointments in here, some jobs, they take multiple days. So you may wanna put in here. Well, day one is going to be this day to day three and so forth, you may assign different tasks to those different arenas or different services that you have inside of a job that, you know, once you want to go

ahead and do that invoice, everything that's included that's showing as complete will be here at or something you can invoice against.

*--- Invoicing ---*

BEN

41:30 So I can invoice any of these things or I can take some certain things off. So again, I don't have to invoice the entire job. I can invoice anything that's on that job. I can invoice multiple times throughout the life cycle. That job. I don't have to invoice just the one thing, but it's all in here.

*--- Invoicing ends ---*

BEN

41:45 You know, anything that I have to do. I don't have to recreate the wheel is just, yeah, I'm gonna invoice all of this stuff. I can even add more stuff here if it wasn't you know, dealt with before it was an afterthought or something that was added undetected and do it for the app.

*--- Accounting ---*

BEN

41:58 I can do it right here. I just create that invoice. Boom, there's your invoice. And again, all that stuff gets set up behind the scenes. You know, what your pricing is on everything, what your, you know, what your tax setup is done. So all that is behind the scenes.

*--- Accounting ends ---*

LAUREN

42:17 Let's let's time out on the tax stuff because there is some I do too. He NPS ti in Canada.

BEN

42:27 That's...

LAUREN

42:27 Simply not set up for.

BEN

42:29 Right. My apologies. But yeah. So what accounting system are you on?

SEAN

42:36 Part of the software we're already on it's all inclusive. It's I believe it's Viewpoint.

--- Invoicing ---

BEN

42:46 It's not, it's not an accounting system I'm familiar with, but we do have some export ability to various accounting systems. So, you know, once invoices are created, you know, those can be, you know, pushed over to an accounting system in most cases and basically just showing up as a, you know, as your revenue source.

--- Parts management (inventory) ---

BEN

43:04 And if you're you know, keeping track of inventories, you can keep track of depletion of parts as you're using them parts and materials. So, I don't want to get into the accounting discussion. I was just merged just wanting to display just how seamless and quick things are that once you have things set up in here, creating the job, executing the job, creating the invoice, you know, these are very seamless and quick operations.

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

SEAN

43:29 No, yeah. I can imagine the just the information flows from place to place.

BEN

43:35 Correct.

LAUREN

43:38 So now that you've had the opportunity to see some of the tasking stuff that was outstanding from our last call, what, where's your head at were? What are your thoughts on whether or not service trade might fit with what you're looking for?

SEAN

43:53 It's doable. It's... more cumbersome... than some things I've seen in the sense that like you can do it, we can do, I understand what we did and how we did it. But it would be lot more work than other softwares in terms of being ample, just... set up a customer for the amount of equipment that they have and the level of detail... that's kind of where I'm at right now.

LAUREN

44:30 What other, what other applications are you comparing this to? Just simply curious.

SEAN

44:36 Well, Northboundary like their Foundation on how that works. And I know you guys said you're looking to partner with them and stuff like that. There's BuildOps, and there's a FieldBoss.



SEAN

44:54 So...

LAUREN

44:58 I don't know much about FieldBoss other than their Microsoft. They send a BuildOps is a relatively new company, but two point you made last week, they got their start in mechanical and kind of hash out a lot of the stuff that we're in the process of. Can't really speak to the potential partnership with Northboundary, but I hear... fast and furious.

--- Purchase decision ---

LAUREN

45:30 So that might be something worth revisiting when there's something to revisit, which I expect some time in the next few weeks, we'll have some kind of an update on that. Would it make sense to regroup after that?

SEAN

45:46 We can, I want to be respectful of your time like even if you guys do get an agreement in Northboundary, then there's going to be months or years of the integration and, you know, making that work.

LAUREN

45:55 Yeah, that's fair. That's totally.

SEAN

45:59 That, that doesn't really meet our time line. What I do expect moving forward with software is that, you know... every three, two, five, six years depending on the software you're with, they would probably warrant somebody, you know, customer like me to go out just to see if somebody else has come into the market is now doing something.

--- Purchase decision ends ---

SEAN

46:20 And that's you know, I don't imagine it's gonna be sticking with the same thing for 30 years anymore with, you know, how technology is and stuff like that. Unfortunately, sorry, that's a possibility. So, the way I see it is from everything I've seen if you guys do partner with Northboundary and get that integrated and use their asking software because it is quite robust and it's very straightforward. I would Ben say that would probably based on meeting with other people that would definitely. But you guys kinda on the top, you know, provider of the full circle of a business cycle, you know, you guys don't have a CRM with Northboundary. You'd have they're really great tasking?

--- Purchase decision ---

SEAN

47:04 And then you guys would have is you have this demo, we've we haven't really touched too high on the ehr, too deep into the functionality of service trade. But what I've seen in terms of it, you know, good in the sense that user friendly cast, you know, customization scheduling, stuff like that, then you guys in my opinion would have the full circle which nobody else has at the moment. From what I see. So.

LAUREN

47:28 What's what's the, I guess you've been to the time line and I got I'm realizing I don't actually know when you're kinda hoping to go live with something. Do you mind sharing that?

SEAN

47:39 Yeah, no, no. I, but my goal is, you know, sometime in the next three, four months.

*--- Purchase decision ends ---*

LAUREN

47:47 Okay. Yeah. I mean, I don't think that would be realistic for... anything Northboundary related to be finished to your point. But I mean, you could definitely be up and running with service trade and service forms and four months.

SEAN

48:06 Yeah, we're not at this point, what I'm thinking is I would, you know, I would set a reminder or whatever for two years from now and reach back out and be like, you know, how are things going? And, you know... now that I don't know what I didn't I don't know what we're going to settle on like my goal at the end of April latest on something because that's kind of what I've committed to the team. It's been a lot of years coming. So... whatever decision we make, hopefully it's the right one. But if it ends up being the wrong one, sorry. No, you're fine.

SEAN

48:48 You know, then that would possibly be coming back and say analysis was, no, this is no bueno, yeah. Yeah. And then that would change the conversation.

LAUREN

48:59 Yeah. Can I ask and we're kind of getting into the territory where I know that service trade dot your first choice. At this point.

*--- Accounting integrations ---*

LAUREN

49:07 I'm trying to help you make the best second choice. Are you looking to actually integrate with Viewpoint? And have you talked with either of those companies about integration?

SEAN

49:20 No, we're completely leaving but it's called valuable. They're under our franchise, they take an Viewpoint, okay. Frank, and signed it to me to work with what we're used to. So yeah, it would be leaving them completely.

LAUREN

49:33 Okay. I had, I wanted to share a cost center entail of someone who I know move forward but build up and which they were basically told that there there would be an integration with their accounting system. I think it was spectrum which is also a of this to product at this point.

*--- Accounting integrations ends ---*

LAUREN

49:57 And a 12 months later they're still not live. So I, I've heard enough about FieldBoss that I feel like their Canadian base. I know, you know this and I think people tend to like them. I have not heard quite the same for BuildOps simply because they are such a new company. I think they're over promising and under delivering on a lot of things. I don't particularly know what those are, but I know from an accounting integration standpoint that's something. So my advice to you would be to ask them for some references that have been using for a while that aren't investors in the company.

SEAN

50:36 Points, yeah, that definitely there what they say they can do and things like that would be a concern. As you said, they're newer. So let's establish a lot more, you know, Foundation to build. So FieldBoss seem to have a lot of capability but they're not even be palatable, which is, you know, I don't like in the sense that, you know, once you, once they got, yeah, you're in that type of deal, so.

LAUREN

51:00 Yeah. So that, that's just my perspective on the market and what, what's out there. I think FieldBoss as a fine solution us plus Northboundary will be a fine solution. And really truly unfortunate that the timelines aren't gonna align on that because we're pretty excited about the potential there, but I appreciate your thoughtfulness in time and then thank you for joining and explaining how everything works.

*--- Dispatch ---*

LAUREN

51:29 I'm Sean, I'll keep you. I'll keep you posted if I hear anything sooner about north foundry stuff. Otherwise... we'll catch up when we catch up.

SEAN

51:42 That's great. I appreciate the time. Sorry, I didn't hand out, but thanks, Ben.

LAUREN

51:47 Hey, you know what they say? Yes? Is there a great knows or? Okay? But maybe it's just suck. So I'd rather have an answer than that. Sorry.

*--- Dispatch ends ---*

SEAN

52:00 Beauty sleep. So many times. I appreciate it. And I said, I'll be, but I'll put your contact information in and set a reminder here and for 15, 16 months and.

LAUREN

52:10 Sounds good.

SEAN

52:11 Yeah, alright.

LAUREN

52:12 Thanks so much time.

SEAN

52:13 Alright, take care guys.

BEN

52:15 Bye.

LAUREN

52:15 Bye.

*The End*