



ServiceTrade Demo with Manufacturers Service Group by The Joyce Agency

John Oconnor with Manufacturers Service Group by The Joyce Agency
Recorded on 1/10/22 via Zoom, 1 hour 15 min.

Participants

SERVICE TRADE

John Oconnor
Territory Manager

Katherine Holden
SDR

MANUFACTURERS SERVICE GROUP BY THE JOYCE AGENCY

Kyle Gochenour

Topics

<i>Call Setup</i>	0:00
<i>Pricing</i>	4:07
<i>Wrap-up</i>	18:10
<i>Pricing</i>	27:29
<i>Pricing</i>	1:07:40
<i>Wrap-up</i>	1:11:55

Transcript

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

--- Call Setup ---

JOHN

0:00 Hey, Kyle, can you hear...

KYLE

0:00 Me? Yep. I can hear you fine. How about you hear me?

JOHN

0:07 Yep. I can hear you. How are you doing today?

KYLE

0:08 Doing well, man. Doing well.

JOHN

0:10 Good. How was your weekend?

KYLE

0:12 Not too bad. Not too bad. Genius. So it's kinda nice to see all the snow following.

JOHN

0:18 Yeah, that's good. Yeah, I'm down in North Carolina ended with who's cold on Saturday for here down here at least and then end up with a little bit yesterday, which was nice.

KYLE

0:27 What part of North Carolina?

JOHN

0:29 I'm in chapel hill?

KYLE

0:30 Okay. Yup. I used to live in Greensboro, so.

JOHN

0:33 Okay, nice. Yeah. Yeah, we're... we're based out a dorm, so.

KYLE

0:37 Okay. I didn't know that.

JOHN

0:38 Yeah, yep. In the research triangle park. Yeah. Yeah. Cool. Well, hey, I appreciate you taking the time to meet with me today to give you some background. My name's John. I am the territory manager here for the... the mid atlantic in the midwest. So, I'm working with all the... the commercial service contractors that are really just looking at service trade. So my job is really just to see if it's a good fit for you guys and your business. So, the plan and kinda had for us today was just to, I know you talked to Catherine a little bit, but just... just to get some background on you guys, then we, I can give you some background on us and then we can hop into the platform and take a look at it. So I had about like an hour blocked off for us today. Does that work for you or?

--- Call Setup ends ---

KYLE

1:24 Yeah.

JOHN

1:26 And I mean, if... if you have any questions, don't hesitate to interrupt, feel free to stop me if you need me to clarify on anything. So Catherine gave me some background. You guys are doing service work, some projects and maintenance agreements... and you are doing, is it a lot of warranty work as well for the Manufacturers you guys work with?

KYLE

1:55 Right. Correct. So, pretty much you can look at this is just a standard full service mechanical contractor, an MVP... but, you know, we were kind of born in the world of just doing the... the warranty work for our manufacturer. So, the... the parent company as a... as a Manufacturers rep from all these companies and they were nosier going products to... contractors... contractors, installing on if something were to go wrong during the warranty period, the contract or just seem to, you know, want to walk away because warranty work, you do it for free, get out. Yup... yup. So we didn't want to hello put the end users, the customers in a bad spot. So we negotiated with the Manufacturers pretty much a rate and hourly rate for us to go out and do all the warranty work for them. Okay? So whenever a warranty issue pops up, we take the call, we do the work and then the... the manufacturer pays us if it's non warranty work because people do know that we represent all of these products still go out and we'll just build the... the end user. So again regular time material service work in that regard. Okay? And then like you said, we're doing projects, were doing PMS, we're doing, you know, the whole nine yards.

JOHN

3:10 Yeah. And I'm... I'm assuming the choice agency that's the parent company, right?

KYLE

3:15 Correct. Correct. And.

JOHN

3:16 Then you... you guys are Manufacturers service?

KYLE

3:17 Group that's correct?

JOHN

3:19 Okay. Gotcha. And how would, if you could like break that down and obviously, this might not be down to the exact percentage but how?

KYLE

3:27 How would you break...

JOHN

3:27 Down? Like what kind of the type of work you guys are doing and percentage wise between kind of have all those all.

KYLE

3:33 Yeah. So well, there's there. I'm going to give you two different numbers. The one is right now and the one that's you know, six months down the road. And I... I gave a number, I think Catherine and I'm probably gonna be off on it, but yeah, I wanna say right now boy, yeah. Again, the majority of our work is... is all project and maintenance agreements. Right now. We're doing very little service, billable work only because we... we took us so long to negotiate all the rates. Now, we kind of have all the right setup. Yeah. But six months down the road.

--- Pricing ---

KYLE

4:07 Now, what we do have everything set up, all process is set up, you know, I say it's going to be still not going to be more than 50 percent service. It'll probably be, you know, around the 40 percent mark, but will be much higher than what we're doing already.

JOHN

4:21 Okay. Then the... the maintenance agreements, those are like recurring services you guys are doing that's included in?

KYLE

4:27 The...

JOHN

4:28 Project side of things, not you're not kind of included in the service side of thing.

KYLE

4:31 No, we're not close or is that? Well, yeah, I'm... I'm lumping maintenance in... in the project work together. Yeah. Okay, cool. I'd say come July, you know, 60 percent will be that project maintenance. The other 40 you'll be service?

JOHN

4:45 Okay. And those... those projects that aren't the maintenance?

KYLE

4:47 It's what, how long are...

JOHN

4:48 Those?

KYLE

4:50 Project?

JOHN

4:51 I know that can vary too, but.

KYLE

4:52 Yeah. So the shortest is, you know, with lead times are being a little bit longer now, but typically, you know, we're talking like a week turnaround, you know, you go out, you estimated job and the product is available. You know, we can get right back to it. Some of them though because we do work with the parent company, a lot or more new construction. So you made that a perfect example. Actually, we put a bid on a job, January of 2020. Your awarded the job, June of 2021. So a year and a half later because it's the bidding process. Yep, some middle's were sent out, they order the equipment September of 2021 and the equipment was actually delivered last week and we actually won't be doing our portion of the project until probably April. So we're looking at like two and a half years from the moment we sent out a quote to when we actually will be able to send the Bill.

JOHN

5:51 Okay. And then when you're typically on site doing that... that work is typically a couple of week long projects. Are you ever doing like multiple month on projects where?

KYLE

6:01 Yeah. I don't know all of our projects will be done. I'd say unless it's something really wonky. Less than a week. Okay. Yeah. Most of the work we're doing is some actually really cool stuff. We're put water filtration equipment that we represent all on a metal scan. This middle skin is then kind of, you know, forklift it into a facility. And then all we're having to do is connect to the invite now, little the water, so something that would normally take three weeks to pipe in, we can do have our work and like two days. Okay. Yeah. And the reason I kind of asked so much about that is because we're...

JOHN

6:37 We're not the system for those, what? Six month long construction?

KYLE

6:40 Thanks for your guys. Are there every day for six months, you know? I mean, no, no.

JOHN

6:44 Are more designed for the smaller projects and... and that service and preventive means. Okay, cool.

KYLE

6:51 What, as far as your current kind of?

JOHN

6:54 Processes you guys have, Catherine said you're using a lot of excel spreadsheets... kinda keep to keep track of. Was it pricing and just...

KYLE

7:04 Those...

JOHN

7:05 Recurring jobs as well? What... are, go ahead? Were you gonna say?

KYLE

7:11 Yeah, I have... I have two main spreadsheets. One is my master number list and, you know, that main spreadsheet has multiple sheets on it. So, you know, there's a 1,000 sheet and that's all my one numbers or my... my maintenance agreement estimates 2000, you know, once I sell a maintenance agreement, it gets a maintenance agreement, job number which is 2000 number and just kind of keeping track of it. That way we're numbering everything. So if a customer calls and says, hey, you know, my estimate was, you know, 3,046, we can look it up pretty quick window. That was... that was estimate or vice versa, job or maintenance or what have you. So that's one set of... spreadsheet... spreadsheet using the other one is my... my estimating spreadsheet. It has all my lovely little formula. Isn't it, I can put in how many hours I asked me this job to be, what's my base cost per hour? So right now, my... my rough cost per hours round 57 dollars that's a fully burden, right? So 57 and

then let's say, you know, it's four hours or whatever on the job. Then it spits out what my cost would be for four hours on the job. You said 57. And then from there, I can put in what I want my margin or markup.

--- Pricing ends ---

KYLE

8:27 I can work it up both ways needs to be. And then it'll spit out what my cell calls to be an advocate for, you know, material for sub contractors. You name it. Anyway. I put all this and it generates a number for me. But I do it off of again margin America. That's what I'm typically playing off of.

JOHN

8:48 Okay. And as far as your guys in the field, are they filling out anything while they're out doing the work or however you guys doing that?

KYLE

8:55 Yeah. So the way that works is we do have a customer form. So Sloan, if you're usually commercial bathroom 90 percent of the time you've probably used to slim you're in or flushed out or both. They're one of our companies that we represent and... and to get paper slip, we have a form guy goes out in the field. We get a certain let's back up. We get a service call guy goes out in the field and diagnosis it figures out what it is. He writes up a report. We turn that report into Sloan with, you know, how many hours it is. And then we get paid off of that. When it comes to estimating they're calling into my inside guy, man. Hi guys work up a quote using that spreadsheet generating a number, you know, sending a quote over right then on there on the spot, quick turnaround. And then so on it that way the whole lot easier if we had something that we could just kinda give a customer, you know, work up a quote on the spot rather than have to call into my inside God, go through that.

JOHN

9:57 Yeah. Okay. And are those forms that they're... they're filling out? So say it's not like you're... you're not sending it over to the company or you're sending it to the customer, say they're paying for that job? Are you, are they bringing it back to you? You're... you're kind of sending setting up an invoice and... and then sending it out to the customer from there. How does that work?

KYLE

10:23 Yeah. Typically, that's how we're... how we're doing it. It's also how we can keep track of the time for our guys, you know, it's more a service ticket, you know, in your world service, they're filling out service regular, bringing it back. And then, yeah, we're... we're seeing out an invoice from there, the service tech, it also lets us know what our final costing is on the job... the job was sold. This is a whole other aspect to having talked to anybody about. We are paying commissions to the sales guys. So they bring in a project... based off of how a job ends up. They get a percentage of that profit that's kind of why I need that service ticket if we estimate that to be 10 hours on the job and you guys only out there for... for what that means, we prompted six hours. Yeah. So that service cinco allow us, no, no, that will be able to put them into

the system to get accurate... you know, data. So, I guess the job, yeah, and that could work it backwards. But yeah, that's... that's how we process it.

JOHN

11:22 Okay. And do you... do you think having like all that and I'm assuming this is why you're kind of looking at us having all that in one system would help you out, help your sales guys out just to keep track of that information. Are you guys having trouble?

KYLE

11:34 100 percent. I, well, it's... it's not necessarily keeping track of it. It's just so much of it that it's... it's a full job, just processing all of that especially for me. You know, I'm running this campaign. I'm spending more time working up estimates because myself and my inside guy really the only two that know how the estimates work... because it is a simple, you know, spreadsheet but it can also be kind of complicated if you don't know exactly what you're doing. Yep. So I'm spending all my time doing that rather than run the business. So I think for my guys to be able to, you know, even out in the field, hey, you know, I think that's gonna take 10 hours and you have going about their day, okay? Because I mean work at the quotes. I'm getting the hours from them any way. So I'm more or less a middleman the whole process.

JOHN

12:22 Yeah, but you have to do it almost just because you know, how to do it.

KYLE

12:25 How do exactly?

JOHN

12:27 Yeah. Okay. Alright. And are you, have you thought about like a budget for... for something like this? Have you guys talked about that internally at?

KYLE

12:38 Yes, no. But I mean we were kind of wide open because so to back it up, I was brought on three years ago to start this up. And at the time we actually had H back division. I say division has a separate company much like my. And very soon after I was brought on, that company division was sold to another person or we kind of broke off completely and... and started. Well, I guess not doing H back with, you know, our old group will have to grow organically. So it kind of took us two years after that to grow it to what it is today back for that little bit of time. When I did have the H vac group, I went through this whole process with software companies before. I kind of have a rough idea of what everything costs and, you know, there's always, you know, upfront cost versus, you know, what the monthly cost might be. Virtually. So, yeah, I mean, it's... it's across the board.

JOHN

13:37 Yep. And we'll... we'll get into that to... to, towards the end if this is the right fit for you guys, as far as evaluating software last time, was it just you kind of making

that decision? Is there anyone else that would be involved?

KYLE

13:50 It was just me at the time, you know, on this one, I'll be at HR at the end of the month. I think you all are heading out there as well. Yup. And so I'll be there with the other two business partners. And so the end result, you know, I'll have to show those guys kind of how everything works because they'll probably have some dealings or want to check the financials and what have you, but they're going to be like the last step more or less just kind of looking through and making sure it's easy to... easy to work with.

JOHN

14:20 Yep. And is that was it, I was looking on the website? It was a Todd... Todd choices that one?

KYLE

14:25 Hello, Todd. Yeah.

JOHN

14:26 What's the other ones?

KYLE

14:28 Troy...

JOHN

14:30 Okay. Yeah. Yeah. I... I was looking at the choice agency website earlier. Yeah. And we'll... we'll be, I think we're going to our H, I won't be there, but I'm sure someone will be there. So if you want to stop by the Booth, you're more than... welcome to do that. Also, if our meeting goes well today, where you think this is the right fit for you guys, typically, I recommend just be running them through another demo where I can show them answer their question, and then we can go from there. So it could be the same thing is today, they would just hop on and kind of... answer, ask their questions, maybe address any concerns that they have, and I can kind of clarify things for them. Perfect. Now, timeline wise, have you thought about when you'd want to be up and running if... if you found the right fit?

KYLE

15:17 You know, ideally within the next six months sooner if possible, but, you know, the... the goal nearly because we're getting ready to do rapid hiring phase and, you know, it could be upwards to 10 to 12 guys for the next six months. So once we have those 10 12 guys, that's gonna be a lot more quotes coming in a lot more paperwork. And at that point, yeah, we're definitely gonna have to have something in place.

JOHN

15:43 Okay. Cool. So that kind of aligns and I just kinda wanna go over our implementation process with you real quick... real quick where say... say you signed

up today? Hypothetically we have implementation windows where right now our first available slot for you is probably February fifteenth where we have a couple of spots left there. It gets pushed back every two weeks once those spots run out. And from that date, that's where we'd start implementing the software and get you guys up and running and trained. It takes about three months, 90 days from that day. So, yeah, I'm just kinda like giving you that context because that kind of aligns, you know, I mean we have some leeway there, but with six months, but that... that kind of aligns with what you're looking at two... cool and have... have you looked at any other platforms?

KYLE

16:32 A lot.

JOHN

16:33 Okay.

KYLE

16:35 Any of that stuff?

JOHN

16:36 Out to you or that... or that you remember it being a good fit or that you liked or you didn't like.

KYLE

16:42 Not really because everyone seems to do about 90 percent of what I need and then lack the final 10. A lot of what we initially looked at. I mean, because we didn't know that there were ones out there with commercial focus. We're more of the residential stuff which will not work. So like your FieldEdge is your ServiceTitan. All of those, they just were not gonna work. Yup. So yeah, kinda went next step and, you know, I've... I've talked to bid tracer BuildOps. I mean, there's so many. I feel your service trade. I feel like the service balls nervous. Yeah. Yeah. There's like 101 service ones. Yep. And so again, you know, yeah, or two meetings last, but, yeah.

JOHN

17:27 Yeah. Then it feels like there's a lot for the residential side. And then a lot of the commercial ones are a construction platforms are built for different workflows. So we're... we're kind of have alone and the we're... we're designed for commercial service. Yeah. And you can kind of see then or layout and hopefully I'll be able to show you that. So I guess if... if I can show you we can help kinda keep track of those... those recurring services, keep track of the... the... the pricing for you guys as well as... just kinda making your processes easier. Are you... are you willing to bring in... Todd and Troy to kind of sit down with me and... and take a look at this?

--- Wrap-up ---

KYLE

18:10 Yeah, we can definitely do that. Yeah.

JOHN

18:12 Cool.

KYLE

18:12 Alright. So what I'm gonna do?

JOHN

18:13 I will, I'm gonna share my screen. I'm going to give you a quick background on us kind of what we're about, and then we can hop into the platform and take a look at it. And like I said, feel free to stop me, interrupt me. Don't hesitate to... to ask questions. So let me just share my screen with you. I'm just gonna pull to... share this. We're in Virginia or are you guys?

KYLE

18:36 So they are based in Chantilly. We have another down in Newport news and I'm actually enrichment.

--- *Wrap-up ends* ---

JOHN

18:43 Okay. Yes... it's a nice area.

KYLE

18:48 Okay. So can you see my screen?

JOHN

18:49 Where it says service trade?

KYLE

18:51 Yup.

JOHN

18:52 Cool. So, these are... these are some of the companies were working with through the midwest and mid atlantic, like hearst mechanical fast track. Some of the bigger companies are like non gov and zone, ao, read. And then power systems, electric is another one we work with in the... in the mid atlantic. And really, so what we're doing is we're helping them turn... turn their service business into customer service business. So we want to help you guys offer a really good experience to your customers. So they keep coming back to you guys as you're starting their service provider. And that leads me into our mission statement and that's to help commercial service contractors be more valuable to their customers and grow their business. So, we were designed for specifically for commercial service contractors and we work with companies from you technicians, all the way up to 300. So we understand your industry and we understand how you guys can make money. But we also understand that the... the standard for customer service has kind of changed

throughout the years and service trade is going to allow you to get valuable information in front of your customers, to show them the... the great work that you're doing for them. And that generally does help our customers grow their business... companies like goober and Amazon. Have I've kind of set these expectations where people want to access certain?

KYLE

20:17 Like...

JOHN

20:18 Asian or just service in general through their cell phones or tablets or laptops. And the idea behind this is people don't wanna make phone calls, ask questions. They just want to have that information at their fingertips. Amazon does a really good job with this with their packages. I'm sure you've ordered a packet from Amazon where they kind of let you know each step of the way of what's going on when it shipped, when it's gonna arrive, kind of give you a post service email to saying like, how was... how was your product or whatever you ordered service trade is trying to do a similar thing. Same idea. Obviously, it's a little bit more complicated what you guys are doing then just shipping a package. But we just want to keep your customers in the loop kinda let him know what's going on with their equipment and when they can expect things to happen. And we're one of the ways we're gonna help you guys to operate efficiently. So want to get the most out of the resources that you have. So we want to let the guys in the field have all the tools and resources that they need to get their job done with lesson, illustrate a burden. So I can just focus on repairing that equipment, installing that equipment, or... or doing the preventive maintenance and worrying less about filling stuff out or trying to find some certain information out. We also want the office staff to have a clear view of not only what's happened in the past, but what's currently happening and what's going to be upcoming in the future. You guys can kind of plan effectively off of that. We wanna help you guys keep your current customers and attract more prospects. Sounds like you guys are going to be growing and have... have a growth mindset. So we want to help you guys kinda get your logo and brand in front of your customers... more often with more detailed information to really build the value of... of the work you're providing for your customers. And then last is our online quotes. I know you mentioned estimates a lot kind of during the first part of this call, we call them quotes in... in service trade, and this is probably one of our most popular features. And it just makes it really easy for you guys in the office and the guys in the field to turn repair opportunities in the quotes and send out quotes for those preventive maintenance agreements. But it also makes it really easy for your... your customers to approve these quotes. And we do this by providing details like pictures and videos to give the customer some insight into what work needs to be done and why that work needs to be done. And this is helping our customers increase their... their quote. Approval rate on average of 34, 30 to 40 percent. And our... our customers on average are seeing an increase in service repair revenue by 23 point four percent... and that is just the average do. So we do have some customers that are doing better than that. And I know you mentioned you're... you're looking to kind of do more service. I think this is something that could kind of help you guys out with that. Any questions so far before I kinda hop into the?

KYLE

23:15 Form? I'm sure you'll get back into with the quotes, but with the quotes, is that what the flat rate, how you set it up or is there a way to manually enter whatever

price I want on? Apart? Yeah, you can manually enter, okay?

JOHN

23:30 I'll show you what it looks like. So let me... let me hop in. So I, I'd set up like a fake preventive maintenance job for us today just to kind of go through from beginning to end. So this is what the... the job will look like in service trade. So you can see the job number my Bill to and ship to. So I Bob Evans location in Michigan. This is the corporate office on billing. And then you can put in like a description of the job if you want. I have that service that the technician is going to be performing on that job. So you can have multiple services on a job. So right now, I...

KYLE

24:06 I have a...

JOHN

24:07 Backflow, a maintenance job here. It's an annual and I just typed up this description. I don't know how accurate that is to compare to what you do. But basically, it just kinda gives us the guy some... some instructions of what he's doing on that service. But if he also needs to do a repair on another piece of equipment or that... that piece of equipment, I could just add another service. No, you can... add parts to the service. So if you want to set up like and I'll get into this with service templates. So if you have those annual services you guys are doing?

KYLE

24:43 You can?

JOHN

24:44 Pre, associate labor and parts with that job because, you know, hey, this... this job is going to be this much just the maintenance shop. So your guy doesn't have to manually add what parts are used, you compare to fill that out for them ahead of time. Now, is this like a service call or whatever? He can just add that as it goes. If you don't know what it's gonna be, you know what I mean? He can add that from the field... or you can edit here. And then you can see your costs associated with this. So once I just added a couple of random ones in here, it looks like this one's 5,500 dollars for that. So hopefully we're going to be charging the customer more than that.

KYLE

25:19 Is this where I would be estimating the preventive maintenance as well? Or is this just more or less tracking effort and soul?

JOHN

25:24 So that, yeah, this is tracking it. This basically a job. So today's the day you're going out to do that. Prevented me. Gotcha. Okay. And are you set it up? And I'll get into kind of what it looks like when you're setting it up on this job. You can also see clock events which I'll... I'll show you in the field... assets. So that's that piece of equipment. We're working on this button or you can see model number, serial number. There's a bunch of options in here. I just filled out a couple that I... I could,

but you could fill out a bunch on any information you need about that equipment under here. So you guys can see that in the field to deficiencies, these would just be any repair opportunities reported on this job. So I'll walk you through what that looks like out in the field and that will pop up here and then comments about this job. So I can see scheduling note. It says only schedule on Mondays and Tuesdays. I also have a technician note letting them know the backdoor codes, one two three four. So they can get it. So you can just put any comments for your guy in the field and attachments would have before after pictures, any job paperwork, stuff like that. Or maybe you want the warranty information added to that job, you can upload a PDF document to the attachments. So that's kind of what the work order looks like. I'm gonna hop into the location page to kind of show you what... what this location page looks like for your customers or for you, but to... to see your customers information and it's laid out similarly. Everything's kind of like a virtual filing cabinet we call it just. You can kinda open these folders and... and see what's under these. So services, these would be all my services that I have committed to this location. So all these ones are just in this demo account. I... I report a lot of repair opportunities and don't end up fixing them. So I have a lot of brokers that... that or do that. I... I haven't fixed them because I'm lazy and don't want to clear amount... these... these red ones. So these are recurring services. I have committed to this location.

--- Pricing ---

JOHN

27:29 So I have a lot of H back ones for me the most where you can see, hey, this is due in October... these repairs. We're doing October as well. This one's November. It's going to be highlighted red... when...

KYLE

27:43 They're past too.

JOHN

27:44 Yeah. When it's overdue. So this one is due in January. This one I've set up today is do a January 30 first. And then when setting it up, you can set like I just set this one up today where I can set up... basically the scheduling windows. So if I want to do is the same day every year, I can do a single day, right? Hey, this is, this has to get done in January. Yeah. So that's...

KYLE

28:08 About how PMS work is you pick the whole month a month man? Yup.

JOHN

28:14 So you can see when I'm editing and next doing 2023 and then those are those parts I had added on. But say, I, I'm going to create a new one just kinda show you the idea of our service templates so I can tie it to the right piece of equipment. And I'm just gonna use an H back unit because we have a template for that. But basically... you can free type up like descriptions and parts and whatever that template is for your services. So if I want to save some time, setting this up like a pre, type up a description... pre associate those parts and then set schedule, it has a pretty

estimated price estimate a duration. And then basically that's gonna save you some time. So you don't have to manually type it up each time you're... you're doing that type of preventive maintenance for recurring service.

KYLE

29:04 Gotcha.

JOHN

29:05 Now, as far as quoting that out and I'll... I'll get into quoting for repairs and just a second. But if I wanted to add a quote for... recurring service... I would just go to add quote on the right side which I just clicked. And then like let's just say call and preventive maintenance job, select the right contract. So all the pricing, right? And then I'll... I'll put an expiration date. Let's just say for the thirteenth and then I will create a new service. Let's see backflow... prevent it.

JOHN

29:45 Thank God for spell check.

KYLE

29:48 It's not made is three still run through.

JOHN

29:50 Yeah, I would just leave it like that. So I'll create the quote and then... it'll pull the code up on this page. But basically... I can edit this on here too. So... if I want to add parts, labor general information, I can add that along here. And then you can basically set this up as a recurring service. So when you send that quote out when they approve it, it's going to create that services are recurring. So.

KYLE

30:26 For them? Okay? Which for a Mac. So, you know, that would be once a year. Yup, you want it every year and that's... that's how all of our maintenance agreements are is recurring. And we just say that, you know, this maintenance agreements for one year. And then, you know, we'll renew at the end of the year. So, yeah.

JOHN

30:45 Yup. Yeah. And you can like how often share this occur? You could just say one time if you want to set it up every year, you know, I mean, and it's it looks like... I had already set the service up. So that's why it's saying I can't do it again, but basically... you could just add that, send that over to them and I'll show you what the call it looks like once I reported repair, but that's... that's kind of how you would... you would add that service to a quote to kind of send that out to your customer.

KYLE

31:12 Yup. And... and back with the... the line items down below. Yeah. When you're in quote up that's where I'm gonna put it in. Okay. Well, there's you know, eight hours

of labor on this job, you know, two hours per quarter with four quarters. So eight hours, yeah. And, you know, four hours of travel time, whatever it may be, and just break it out that way, right?

--- Pricing ends ---

JOHN

31:32 Yup. Yeah.

KYLE

31:33 And when you're...

JOHN

31:33 We have like the... the concept like that service template, we have a concept of quote templates to where you can save some time where you're building that out. If it's yeah, say it is cook. I know I think you told Catherine you're not doing a lot of cookie cutter stuff. But if it is, we have that option for you, but you can just manually.

KYLE

31:50 Yeah. Yeah. I mean that, that's been, he does, everyone is cookie cutter and I'm Rob the like percent how my 100 percent business cookie cutter?

JOHN

32:00 Yep. Yep. Yeah, we... we give that option because it save some time for those jobs because you don't have to put them as much attention to them. But yeah, you don't you can individually edit it and...

KYLE

32:08 Yeah.

JOHN

32:09 Have have those different markup rules for... for different parts, choose, you know what I mean?

KYLE

32:13 Yeah. Yeah. I mean, you know, the Romare stuff. I mean, one one piece of equipment that's not on this gear but is another may change the price, but, you know, five, 600 bucks. So hard to cookie cutter, a reward skip back flows or a different story that's that price is the price is the price is the price? Yeah. Yeah. So that would be our one cookie cutter.

JOHN

32:34 Okay. Yeah. And... and we could help with that. So back to this location page. So you can also see under this tab jobs, you can see every... every job at this location that you've done. So I can see, hey, I've done service calls installations. I can see

upcoming jobs and it looks like I have some that aren't completed because I never completed them out. And then you could see the invoice as well, how much is charge? So it gives you full service history. I can see every piece of equipment we work on at this location. So I've... I've a couple of different things here. And then you could go into it further, see the service history on that specific piece of equipment, if you want to see what's been done there. And then deficiencies are those repair opportunities found. It looks like I have a lotta broken compressors, you can see the status. So like this one's new, this one has been verified. And then I can see those quotes that have been sent out... at this location. And then contracts would just be your... your contracts for that location, comments for location, any attachments? So it breaks everything down so you can see kind of everything relating to the location that you need to see.

KYLE

33:41 I got ya.

JOHN

33:45 So I'll what I'll do is I will, I'm gonna actually hop into the.

KYLE

33:51 It's like Kwanzaa, CRM, yeah.

JOHN

33:54 Yeah. Yeah. I would really, it's more so we don't identify as a CRM because we're more so for your current customers, you know what I mean? Yep. Yep. And I know a lot of CRMS are related to sales and we have some sales capabilities where you can track your... your contracts and stuff like that. Yeah. Yeah, it kind of just so I'm gonna hop into the field, show you what the technician sees when he's kind of completing the work order. So give me one second. Can you see this where it says appointments?

KYLE

34:27 At camp?

JOHN

34:28 Okay. So I'm gonna filter, you can see your list. Your guy can see a list of appointments and then you can filter by the day. So I can see my appointments for today. So I'm on my iPhone right now, we're compatible with iPhone, android. So our customers either use tablets or cell phones to really personal preference. But basically, I see my list of appointments. I'll just click on this and I can see as a technician, everything that needs to be kinda checked out or completed. So over our services... comments, deficiencies, attachments, paperwork, stuff like that. But first thing I'm gonna do is I'm going to clock in say a hop in my truck. I need the clock in route and it sounds like you guys do track drive time, right? Correct? So they can clock in and route... and I can actually notify the customer. So I have your email here. I can notify you, hey, I'll be there at 141 and you'll get a, an email in your inbox with a picture of my face because I have that set up like that basically saying, hey... hey, this guy will be there at this time to do the work. Sure. And then you could

actually click on directions and that will open up their Google or apple maps or whatever they use. So they can, and to accurately determine when they're gonna show up. So I'll block out here and just clock in on site. We also have clock events for a job rep. If you guys keep track of that, the just swipe one more over there's. Job clock events too. So I'll... I'll go to services right here. I can see, hey, I gotta check develops, check their gap, check the presenters. And then I know what I have to do right down here on the bottom is assets. So that's like customer piece of equipment. And I can see, hey, this is what I'm working on today. You can also see any piece of equipment at that location. So you notice something else you want to check it out. But I can see I can click into this and see any information about that equipment. So model serial number, any other information you'd want to see and kinda get that information at my fingertips. I would also see service history. So I can see any past work order that's been completed or scheduled at this location. So I just have one because I set this up today but I could click in here and see kind of what was done in the past. See any pictures, see what was completed. It looks like they repaired a valve. And then I could see kind of what items were used and who is out there? That, do you see that being helpful for you guys in the field?

KYLE

37:06 Yeah, definitely. Well, especially, you know, any, I try to have the same guy on every job, but that's not always the case. And so you get a different guy going into a job, you know, it's whole lot easier if we can bring up. Well, yeah, Tom worked on this and did this, you know, rather than come off, you know, it's something completely different.

JOHN

37:24 Yeah. And do they ever like call you with questions like that? I'm sure if... if they're doing this?

KYLE

37:28 Yes. Yes. Yeah, I feel like I feel like...

JOHN

37:32 Could possibly help them kind of eliminate some of those questions. Were there not annoying you as much? So as far as job items down here. So we have those... those items that were added on there from that template. So I have the... the plan maintenance, the trip charge the labor say I need to use apart for whatever reason as the technician for this job?

KYLE

37:53 I can.

JOHN

37:54 Just add that on there. And then I can select the item from my list of parts. So let's just say I need to use a widget just to make it simple. I'd add that on there. I can add the cost. You can have if you want your technicians, they had the costs. They can, if you don't want them touching it. They don't have to. And then I'll just add that on there. And then that gets added to the work order to make sure you... you charge the

customer... attachments. Right here. This one would just be basically, you can put any... any PDF in there like a repair manual or if you want the warranty information in there... you can add... add a PDF there for... for your technician and then you could send it to your customer later on if you want. Or you could do a lot of our customers use this for like videos or before and after pictures. So I can just take it before picture, add that on there. And then once I'm done... taken after picture. And that way when I'm sending this to my customer, they can see, hey, would you guys do, and they have those pictures on there?

KYLE

38:58 And, and is that possible for maintenance or group? Yeah, obviously main screen that's perfect. Yeah, we have a customer that, you know, it's a condo building in water and... and they want to see before and after pictures? So it's yep. Yep. Yep. They could.

JOHN

39:12 That there videos are awesome too. I feel like if... if a equipments making a weird noise or something like that.

KYLE

39:19 Yeah.

JOHN

39:20 Or doing something where the video helps, it's easy to add videos. And then you could do like audio notes for... for you in the office, say your guy does want to type something out or call, you... you can just add audio gram or like, hey, I need, these parts are amazing. These parts onto a work order. This is why, and then they can just send that. And then when you're looking at it back from the office, you can see this is attached to and take a listen to it... deficiencies. So this is how they would repair report repair opportunities. So say, they're doing a preventive maintenance job. They noticed something on that... backflow would do you guys find a lot of repairs on backflow equipment or no?

KYLE

40:03 Yeah, yeah.

JOHN

40:04 I guess what's... what's a common one, they would find?

KYLE

40:08 It would be... just say debris and check... check one?

JOHN

40:15 Okay. So I can type it out. You can also do one check one. Yep. Okay. You can also do talk to text and it saves them some time there, I know. Technique.

KYLE

40:25 That's...

JOHN

40:25 Not always like typing stuff out attachments. So you definitely wanna take a picture. This to your customer can see it. So I'll just take another picture. My bubble head. This is where audio memos or ask them to where they can just be like, hey, I found some debris. I'll need these parts and it'll probably take an hour to... to fix. I'd probably do it while I'm still out here. And then they could send that back to you. I can market as deficient but it's still operating. And then it was on this Buckner market as new. And then I can just say needs fixed, keep it simple. Now, are you the one, are you you're typically sending out those... those quotes for repairs, right?

KYLE

41:09 Right.

JOHN

41:10 Okay. So basically, this will, once that's reported and I added that from the field, this will notify you via email saying, hey, this deficiency was found. It needs to be quoted out. And then you can also, I'll show you where it shows you on the job page in the office too. Now, if you wanted them to send, if you want your technicians to send the quote out from the field that's something they can do... but it also will notify whoever in the office is sending out quotes to. Does that make sense?

KYLE

41:45 Yeah, makes total sense. Awesome. Now, when you guys are doing those?

JOHN

41:48 Preventive maintenance jobs, are you guys doing like checklists are filling out specific forms for that?

KYLE

41:54 Yes. And no, I mean, we're at filling out any particular form we... we do again, this one customer wants to book corner, they want to after action report saying, hey, what did you find? Wouldn't do that sort of thing? And yup, the form that we have that, you know, I end up actually typing up and then I, it's... it's a PDF. And so I'll attach the pictures of the guy sent me and, you know, I'll send it on. Okay? But no, not true tasking. I mean, yes, there is tasking. We just broke down because we're doing it's. Not like it's a H vac rooftop unit that has 101 thing, gee, to check on it. Yeah. Yeah. The rain water's pretty simple. It's okay, filter, put a new filter and take out the uv like put a new idea, okay?

JOHN

42:40 Yeah. And that, that's kind of where the description would be right there for the service. The reason I asked that is because we have the option for billable PDF to be added and...

KYLE

42:48 Right. For...

JOHN

42:48 Refrigeration, H vac, they need certain readings, you know what I mean? Or certain stuff filled out. So a lot of people will do, and I'll just show you real quick because it's...

KYLE

42:58 And that's... that's where I come from is the H back world. So, yep. And again, we're getting ready to do the H back. I think again, yup, do it in house and do kind of our way. So again, it's not relevant right now. It might be two years down the road though.

JOHN

43:15 So...

KYLE

43:15 Yeah. So boilers are relevant now because we do maintenance on boilers. Okay? The one thing, yeah.

JOHN

43:21 Yeah. So if you have a checklist or... or like we are refrigerant tracking one in here. These are your forms we, we'd help you turn into syllable PDF and then you guys could just fill them out and Adobe alongside it basically just add it back to service trade. Okay? And then...

KYLE

43:36 You're doing those forms that... that?

JOHN

43:37 Gets attached to post service report as well. But what was I gonna say? It's prefilled with like the certain information like customer information equipment information. So you're not filling that stuff out. It's just like the checklist you have to fill out and they... they would only be searching through these VC, the individual form associated with that service. So it's not gonna be like eight forms on there. They got a search through it's. Just, hey, this is what you need to fill out this work order.

KYLE

44:02 Gotcha.

JOHN

44:03 So, that's an option for you guys down the road, we also have work acknowledgements if you get your work signed off on. Is that something you guys

do?

KYLE

44:11 Yes. Okay.

JOHN

44:13 So, I'm gonna select you as my onsite contact. Customer can put a po number in there if they want.

KYLE

44:20 Yeah, that's one thing we really push this po numbers. Yeah.

JOHN

44:23 So, I'll just put this in here, one two three four. And then worse. So I acknowledge that this work has been completed, confirm, I'm going to send you a copy right now and then you could sign it. So you'll get an email, hey, that this work who's completed. It's. Also, we send like a post service report to where all of this information is kind of in one place for the customer. And I'll show you what that looks like. Contacts is just, hey, I got contacts if you put a phone number in there, that would be on there so they can call them. So I'm going to clock out, complete this service and then finish my job out in the field. And then we're done... one thing. I didn't show on my appointments. You can also see any unscheduled jobs or completed jobs. So say... say, you have a question for one of your guys, they could just scroll back, be like, hey, I was on this job, take a look at the information and see what they did. You'll also have access to that information, the office too, but, okay, any.

KYLE

45:27 Questions about the mobile?

JOHN

45:28 App before we... we move?

KYLE

45:29 Into the office? Yeah, that's super simple.

JOHN

45:32 Cool. Do you... do you see your guys being able to use this? And instead of kinda help them?

KYLE

45:40 Yeah. I mean, I hate saying it seems pretty idiot proof. So, yup. Yeah. Well, that's... that's the goal. Yeah. Yeah.

JOHN

45:48 Cool. So I'm gonna... I'm gonna hop back into the office and show you what that work order looks like when it's kinda completed out in the field?

JOHN

46:00 Okay. So, I can see this is completed. I can see like I added a part two, and then this is where, if you want it. Like I have to change the cost on this because there's nothing to entered in here. So our standard for this one is just 12 dollars. Okay. Now, if you want to source it, you can like to a technician, their truck parts vendor or warehouse or whatever you need. Now, we're not like a inventory management system, but you can kind of track where stuff is coming from too.

KYLE

46:29 That would actually be huge. Yeah. Yep. So from a wholesale, you know, the supply house, other stuff from our end, where else? But like those you'd be, yeah, we buy these uv lights and boxes of 10. So, yeah, yeah, that'll be.

JOHN

46:43 Yeah. So, I know I didn't show you and when say your guys adding that widget from the field, you can select, you got it from the parts vendor, and then you'll set up your parts vendors in there, and then he can put a po number in there. Now, we're not going to generate that po number. It's however you guys are doing it now, but you can kinda have that information live in service trade too.

KYLE

47:05 Gotcha.

JOHN

47:07 And then if I want to make any changes, these are just my standard cost... for these parts, these specific parts. You can change these if you want for that specific job. And then we'll have, you could set up like different markup rates for different prices. So say, you can have like different rules where it say calls 50 dollars, I'll market up to this if it costs 5,500 dollars, it gets marked up to that.

KYLE

47:30 And where, where's that done?

JOHN

47:32 That is done under contracts which I, I've never actually manually done it myself because I don't want to mess up our demo account or anything, but.

KYLE

47:40 Yeah.

JOHN

47:42 Yeah, you would just go to, I believe it's under service contracts and you can set up rules for those markups.

KYLE

47:48 Gotcha.

JOHN

47:51 And then like when selecting a contract on a job, you're gonna select the contract. Do you want to use? Okay, clock events? You would just see, hey, I clocked in... in route at one 35. Took me a minute to get there. And then you're gonna see I was on-site for nine minutes total. Can also see, I was... I was 546 Miles away from that location that up from this Bob at this location. So kinda let you know.

KYLE

48:16 I didn't do the work.

JOHN

48:17 Yup. Yup. Or, I mean, yeah, or they just, I don't know, they forgot and clocked in and out when they weren't there because you could see I was there for nine minutes worth her... assets. Same thing. You can just see that. And then deficiencies is, hey this... this repair opportunity was reported. So I'll open this up. So I'm going to be able to see it looks like I have a salesperson associated to this job, but I want to be able to see who reported this deficiency when it was reported on, what job. And then any related deficiencies that would just show a previous repair opportunities reported on that piece of equipment. So you can see if it's like a recurring problem. So I'm gonna, and this is where you'd see attachments. So I could see picture and that attachment. So I'm gonna add this to a quote. I'll create a new quote, the next iteration ration date. And then... we'll build the scroll down... so I can add a description here, add parts. And then the thing I was saying about quote templates, so I can say, I... I find a lot of, let me see if we have any backflow. No, we don't just hypothetically if we had an H fac... are broken compressor on H back unit.

KYLE

49:41 Playing works. Yeah.

JOHN

49:43 They all do press replacement. You could free type up these subscriptions.

KYLE

49:47 Yeah.

JOHN

49:48 In your own verbiage, pretty associate parts and that gets added on there. And then you can make any changes from there. But if I want to manually type my... my description, I can. So brogan, we do a debrief yet. So I don't know too much about

backflow myself. So... I do a lot of like H vac, demos and integration. So broke it debris found.

KYLE

50:15 The first check.

JOHN

50:17 In, in the first check and then you can put whatever you want in here so your customer can see it parts so I'll add, let's just do labor, probably gonna take what two hours. And that's my costs setup for the two hours according to this contract.

JOHN

50:42 Let's just say a widget was used... all use for home and then... trip charge.

JOHN

50:55 A 50 dollar trip charge. Now, my price doesn't really match up... to this. So I'm gonna do let's just say 55... makes sense. 85.

JOHN

51:14 And then I'll... I'll save this... this isn't the best built out quote, but it's just kind of showing you that you think that it edit... edit this stuff. I didn't... I didn't put a price in for.

JOHN

51:25 So, you can see our gross margins 47 percent on that job. So I can kind of play around with this if I want to your customers only gonna see the price. Obviously, they're only gonna.

KYLE

51:33 Unit price. So that's how... that's how I'm getting it. Okay?

JOHN

51:37 Yup. Yeah. And that they're... they're not gonna see this. And then you can show them whatever you want to show them. So certain customers say, hey, they don't really care. You can just show them the grand total, someone to see the line items with prices are but line item with details. So this one, I'll show them the prices for each line item from here. I'll just send it to the customer. I'm gonna actually send this over to you and then say, I want to turn off this audio message. My technician said something you don't want them to hear. I'll... I'll turn that off.

KYLE

52:07 I was like, you know, technicians pretty well.

JOHN

52:09 Yeah. Yeah. So I'll send that over and then I'll pull it up on my screen if you can approve it on your end. If you have access to your email be awesome.

KYLE

52:21 Yep.

JOHN

52:22 You'll see.

KYLE

52:24 Your customer will see your.

JOHN

52:25 Company logo where ours is aardvark service, the consumption, the service, the attachments, and then those parts, service and labor. And then they could just approve it or if they don't want to approve it, they at least have to tell you why in a request changes.

KYLE

52:41 For the, wait a minute, I'll just put one, two three four for the terms and conditions, Israel and upload my terms and conditions somewhere.

JOHN

52:51 Yes. So that would be under the contract.

KYLE

52:55 Okay.

JOHN

52:55 Yeah. The calling pros, heating and air that's... that's the contract. I use that terms and conditions is going to be on under the contract. So, yes, you can.

KYLE

53:05 I mean, our term t's and c's are the same for everything, but it's like it would have pages long. So... we're in on every.

JOHN

53:13 Cool. Yeah. Right. And then kind of going off of that, you can actually see, yeah, you approve it. I can see the quote history. So I can see when my technician added these attachments. If you had sent this out to your customer, you can see when you sent it out. And then I can see the customer when they viewed at that quote when they approved it... approved it. So I can kind of run reports and I'll... I'll open this up in a second, but I'll be able to run your.

KYLE

53:41 Definitely nice when somebody says I never got your quote will actually.

JOHN

53:45 Yep. I saw you take a look at it. You can run reports to, hey, I wanna see all my quotes that have been submitted and viewed and run a search. And then I can just resend them to the customer, just resend the quote over to them. And then you can... you can filter it like, hey, I want to run a report on quotes this week or from a month ago. But basically, you can just bulk resend those to all your customers without sending quotes in that timeframe and it'll just email them that automated email saying, hey, this quote needs to be approved. Then from here, you can just add it to say your guys still out there. I can do it. You can just add it to the existing job or create a new job and kinda schedule and dispatch it out... so that that's the quoting and the estimating, I'm kind of in a nutshell, do you... do you think that kind of fits with what you were looking?

KYLE

54:40 Yeah, 100 percent. Well, I was kinda Leary until you show me the... the margin and mark up that... that section. Yeah. And then there was like, well, you're already doing or than the 99 percent of the other people have interviewed. So sub contractors, where would that fit in if I had to use a sub contractor on a job? Let's say I was quoted job and I need to use it. So.

JOHN

55:03 That is a good question. I am, I will have to kinda looked at up. I, I'm not well versed that we can do it. I just, I'm not well versed and kind of showing you myself. Yeah, but let me.

KYLE

55:16 It's mainly just for the estimate for, I assume it would just be another line item. I could put subs or something. And.

JOHN

55:22 Or as the labor.

KYLE

55:24 Yeah. So... one of the things we're doing again, I think I told you is selling the skids of... of water filtration equipment. So, you know, I'll have my labor, whatever my labor might be. And that's one line item. I'll have a line item of the actual water filtration equipment. And then I'll have a line item from our manufacturer RMS for them to actually put all the equipment together. So they would be treated as a sub contractor at that point. Sas, but, you know, you're we're really treating everybody has like their own little product if you will. But yeah, just type in sub contractor and.

JOHN

56:02 Yeah.

KYLE

56:03 Subcontractor dash, RMS or whatever it may need to be.

JOHN

56:06 Huh. Yeah. You can add a, and a different kind of line item or however you'd want to do it and add that on there.

KYLE

56:13 Just for that. And then, yeah, back to what you said about with the payments showing them grand totals. Is there a way to... yeah show the grand totals but also not breakout each line item? So let's say, you know, for that quote you're on right now, it says widget?

JOHN

56:36 Yeah. Yeah. I'm gonna invoices out. So I'll show you that it on that.

KYLE

56:39 Yeah, if I can just see 57 90 rather than all those four things broken out. Yep, I don't want to, it's like the wizard of oz. I don't want to show the customer what's behind the curtain. Yep.

JOHN

56:50 So, I'm when I invoices out, I will show you, I'm gonna air unit cost to this one second. So, yeah, basically that you just showed them the grand total and they'll see just that. Are you, I forgot to ask you, what... what are you guys using an accounting system are using?

KYLE

57:08 Yeah. We use Quickbooks right now. Cool. That makes you integrate or no?

JOHN

57:13 Yes, we do. And I'll send you a video of what that looks like. So, this is our original job that we are a guy completed on the field. So in the office, I'm gonna have to just click complete job.

KYLE

57:25 Okay.

JOHN

57:26 Great. An invoice. And then I'll just created from these... these four items I had on that job. Yeah.

JOHN

57:37 Now, you can see the gross margin is not great on here because we don't have our markup rule for this. So I'm just gonna put what 6,000 to get it over.

JOHN

57:54 You know, when people like setups hearts when they're doing these demos, and it just doesn't end up making sense when I add them randomly. Well, let's see alright, where at 16 percent, I'll take it. Yep. So right here, when I'm doing that invoice, I just got a grand total only save that. And then if I want to add... add notes, the invoice like the service description. Yeah, yep.

KYLE

58:21 When he found a job, if it's a PM or invoice in the PM, and it's like, hey, we found these deficiencies quote will follow. I could probably put that in there.

JOHN

58:29 Yep. Yeah, you can do that. And then from here, you can see the po number two up here. And then I'll just send an invoice LinkedIn. It's going to be similar like what obviously and get a little bit different. But I'll pull up on my screen too. Yeah.

KYLE

58:44 Yeah. We wait until the end to talk about the... the accounting side. That's one of the other reasons why we kind of, you know, jumped on this is it's very hard. Yeah, that's perfect. Very hard for Tiffany, my... my billing person to get everything my stuff over to Quickbooks. It's very hard to, you know, integrate together. One of the biggest things is when she does do an invoice for some reason, it keeps on one, do the line items. We've... we've kind of figured out how not to do the line items. But yeah, yeah, it's... it's... it's hard.

JOHN

59:15 Okay. Yeah, I'll... I'll show you. I don't have a Quickbooks account set up and I'll show you where in service trade, you just send it over. And then I'll send you a video of what... what it looks like in Quickbooks. So maybe Tiffany can take a look at that. So this just says pay now option where they can pay with credit card or it looks like I only have AC, H setup for this amount. So you can have different rules for stuff like that. And then service details. This is that post service report. This is one of my favorite features where this is what the customer will see what their invoice. This can also be sent separately, say like you want to send it out before the invoice comes out or whatever where they could see who performed, what work, what parts are used. You can leave any comments. I just didn't turn this off for the customers, but you can leave any comments for the customer. Like, hey, we found that deficiency which will also be over here. But anything you want to put it in there, you can put a comment in there for them. Yes, files still have that work acknowledgement form. They'll have the before and after pictures. And then it looks like I left that audio message on from the technician, but they would have those attachments and then alerts, they're gonna have... the ability to see, hey, this deficiency was found. A, these are the attachments we associated that's the description of what we found. So it kind of notifies them again. And then this would all be your... your company information to... is that kinda what you were looking for with the opposed to service support? You think that would?

1:00:46 Yeah, 100 percent 100 percent. Because of that, the pictures and then I can write up whatever, you know, description I need to write up. Yeah, how's everything? As far as dispatching goes? Is there any dispatching side stuff? And... and I know that like for a service call, yup. Okay.

JOHN

1:01:05 So there is, I typically only, I show that last just because... I don't know. I just, I like show them kind of what... what we're about first project. So this would be the dispatch board where say a customer calls in and say it's Bob Evans. Again, I would just type in their information. I'm gonna click that one. Your information is going to pull up because you're the contact on that location. And then if I want to let's just say it's an emergency service call... pipe is broken panel, keep it simple. I can schedule this out because I can see these are my technicians right here. So I can see their calendars. I'll tie it to that right piece of equipment. So I'll just do it on that standpoint needs fixed. And then I can assign a technician if I want. So I can just have myself on here... or I can take myself off and then schedule it. But what I'm gonna do is I'm just gonna leave this as a open job right now are open, you know, open job. And then I can go to my list of available jobs. So say, I don't have a guy ready right away. I can see like, hey, these are all my service calls, priority, urgent, emergency, preventive maintenance or whatever. And then I can click into this when we have time, just assign it to attack. If he has extra time that week, you can do that or I could just schedule it out for a time. I know he has available gotcha. It's also drag and drop. So if I wanted to just drag this onto Charlies calendar right here for 10 15. I can do that and that would add it to his list. We also have a map based scheduler and this is typically for... I would say it's... it's good for planning out those recurring services. So I can see all of my jobs and we have a lot of different services in here. Shouldn't, me one second. I can see all my jobs on the map for a week or a day as pins. So they're color coordinated. So I can see, hey, this one's for Clint. If it has a calendar icon that means it's been scheduled. And then these... these great pins are going to be on assigned jobs. And you can also see their own scheduled. So I can check into this as a technician. I can also drag and drop it. I'm not gonna, I don't know if someone just set this up or not, but I can drag this over to my name. It would turn whatever pink or magenta or whatever that color is. It's gonna turn that call and then I can drag it onto the calendar for Thursday if I wanted to and drop it on there. So just let you visualize where jobs are at. So you could say, hey, these two are close to each other. Let's schedule them out together. Now, one thing I didn't show you before typically, I'll show this before kind of showing the map. Where this, what this is here, this page is a service opportunities report. So what this does is it pins every location in my service trade account for those recurring services that I have kind of what we were looking at earlier on that location page, you could see those overdo ones where I can see these are all the ones that are due next week for all my locations. And then I would just bulk create these as jobs and then they're gonna pop up as that as those gray pins on the map so you can schedule and assign them to technicians. Okay? So kind of let you make sure you're not missing any of those recurring job. And then last page here... with scheduling, it's just, this is just the homepage. I'll kind of show you where... it just gives you an overview of what's going on that day. So I can see it looks like I'm the only one appointments today. You can see any overdo jobs without appointments. So obviously, you wouldn't want this list to... to build up jobs without appointments, do in the next two weeks. So making sure you're... you're scheduling those out as soon as possible, those jobs in the field that have been completed and then completed jobs that need to be invoice. So this page is

just like, hey, these are tasks that needs to be done. So you're not either missing jobs are missing payments.

KYLE

1:05:17 It's more or less your overall, you know, dashboard if you will. Yep. Yeah.

JOHN

1:05:21 Exactly what it is. Yeah, just dashboard gives you an overview... and then you could see clock events do. So you can see kind of what's going on the field... real quick. So with... with Quickbooks say I had a Quickbooks account setup. This is that invoice we just sent out. Yeah, there will be a tab here and sometimes there is in our account, I'm on the way. But basically, it's gonna say send to accounting system. And then you could just send that invoice over to the accounting system from there. And it's just a one way integration, send that invoice over. And then you're good to go. You can also do it in bulk. So if I similar to those quote reports, I can run invoice reports and like check it off is fully paid, run a search for these invoices. And then I can see there's a bunch of them. I can just instead of export a spreadsheet, it would just say send to accounting system and that would send all those invoices over to the accounting system. In the video will show you what it looks like on quick Quickbooks his end, but that's kind of how that information gets sent over. And then the videos does a pretty good job of showing you kind of what... what that looks like. Do you... do you know if you have Quickbooks desktop or online?

KYLE

1:06:33 It's a desktop.

JOHN

1:06:35 Okay. Cool. We have integrations with both. So I'll... I'll send you the link for desktop. And then last thing is just same thing with those quotes. You can bulk, send invoices say they're unpaid, they need to be paid. You can send those out to the customer. Again. They're solar winds out of it... and that is service trade in a nutshell. I know we covered a lot in the last 10 minutes or so, trying to show you everything. Sorry.

KYLE

1:06:59 Yeah, that's kinda service trade in a nutshell. Now, do you... do you see?

JOHN

1:07:04 Says a good option for you guys from kind of everything we talked about earlier?

KYLE

1:07:09 So, you know, as I was saying, everybody had like 90 percent and they're not doing 10 percent. No, you're the first it's got 99. I'm not going to give you 100 man. Okay. What? Whatnot...

JOHN

1:07:21 We missing?

KYLE

1:07:22 I don't know, but yeah, okay.

JOHN

1:07:26 I'll take it. I'll take it.

KYLE

1:07:27 Yeah. Yeah. I'm holding the one percent. Yeah, but yeah, no, not me. I mean, you, you're actually doing everything I need, you know, especially the way I can do my quotes, you know, maintenance rooms, you name it.

--- Pricing ---

KYLE

1:07:40 I mean, the... the biggest thing is just being able to work up the quote, both, you know, preventive maintenance and job quotes. Let... let me ask you this. You know, you kind of have your own quote for maintenance agreements. Is there any way to upload kind of like our sheet or spreadsheet that we, that spreadsheet or PDF that we use for quotes in there for maintenance agreements like our own?

JOHN

1:08:06 Like format you're saying?

KYLE

1:08:07 Yeah.

JOHN

1:08:07 Yeah, no.

KYLE

1:08:10 Often more like a report, yeah, quote rather than just a one page, hey, this is your price. Yeah, and that, that's mainly for the maintenance agreements, right? Yeah, that's maintenance agreements.

JOHN

1:08:22 No.

KYLE

1:08:23 But you could.

JOHN

1:08:24 Just build the maintenance agreements off of the... the way you send them out now.

KYLE

1:08:30 Yeah, yeah, because you use.

JOHN

1:08:32 Or you could just do it by location and build that recurring service or?

KYLE

1:08:35 And there, yeah.

JOHN

1:08:37 But it wouldn't be like, hey, you can upload your own format and we'd send it out for you, I guess.

KYLE

1:08:41 Yeah, mine, and worst case, I could always just work up a quote in your system. Yeah. Well, I mean, that's one of the things that I'm sure we can figure out. Yeah.

JOHN

1:08:50 Yeah, for sure. As far as pricing, did you want to go over that? I know we're a little bit over.

KYLE

1:08:55 Yeah. Shoot the pricing. Yeah. So.

JOHN

1:08:58 Hello, you have, was you said four guys right now?

KYLE

1:09:02 Yeah.

JOHN

1:09:03 Okay. And you're looking to add? How many did you say? I'm sorry, in the next six months or so?

KYLE

1:09:10 Say 10 to 12?

JOHN

1:09:12 On the twelfth?

KYLE

1:09:13 Yeah. Now, that's if we can find and let's be honest... no.

JOHN

1:09:18 That's fair and...

KYLE

1:09:20 And I... I asked that is because we have different plans.

JOHN

1:09:23 So, we have a select plan, a premium plan and the enterprise plan, and I would probably recommend the premium plan for you guys because it allows for a contract pricing which is different markup rules for different customers. Yeah, and also allows for sub contract work. And then I know salesperson tracking was something you wanted to.

KYLE

1:09:42 Yeah.

JOHN

1:09:43 That, that is probably the level I'd look at for you guys in that is... 119 per month per technician.

KYLE

1:09:52 Okay.

JOHN

1:09:54 Now, there is, sorry, I want to give you like an accurate amount, first year setup fee there.

KYLE

1:10:01 Is it's about?

JOHN

1:10:02 3,500 dollars of setup on top of that cost. So it's let me do the math real quick. I believe it's seven. We do have a five tech minimum for the licenses. So, I believe it's 71 40. Give me one second. Yeah, 71 40 plus 3,500 for the first year. But every year after that is just, you just be paying the 119 protect?

KYLE

1:10:30 Okay. Yeah. And that's for five licenses?

JOHN

1:10:32 If you add more guys, it's... it's gonna go up though the 119.

KYLE

1:10:36 Michigan my numbers or whatever. Then... I went to college, but I was not a numbers guy.

JOHN

1:10:44 It's our calculators, make it... make it hard.

KYLE

1:10:47 Yeah, yeah. Make it easy in.

JOHN

1:10:48 The moment.

KYLE

1:10:49 Hello, right? So, more or less, was that 10 sick more or less all in first year. So, when it comes out to me, yeah.

JOHN

1:10:57 At 10, what was it?

KYLE

1:10:58 In 640? Yup. Yeah, that's...

JOHN

1:11:00 Five licenses. Obviously, you could add guys as you go and you're gonna have to... it's... it's the 119 per month and then you have to pay like a, I think it's 350 to set them up. So, yeah, that, that's what the first year would look like for five licenses.

KYLE

1:11:18 Is that, I obviously, the first year fee that's upfront is the 119 per month? Is that upfront cost? Or do I, can I just pay that every month?

JOHN

1:11:27 Yeah. It's... it's all a, it's an annual payment?

KYLE

1:11:30 Annual fee? Okay. Yup.

JOHN

1:11:31 Yeah, it'd B.

KYLE

1:11:32 Thinking budgeting, you know, budgeting out how yup... yup.

KYLE

1:11:41 Alright. Cool. Well, yeah. Let me just perfect. I mean, I'd have to more interviews, but I mean, you're the only one that's done everything that I need so far. Yup. And the pricing is right, kind of in a nutshell where everyone else is kinda sorta been, so.

--- *Wrap-up* ---

JOHN

1:11:55 Cool. Yeah. So, I... I know I kind of asked you if you, you'd be willing to bring in. Was it Todd and Troy gotta check this out, is.

KYLE

1:12:02 That's something?

JOHN

1:12:04 We would have time to do an upcoming next two weeks or so or... or?

KYLE

1:12:11 Yeah, good question because their schedules even worse than mine.

JOHN

1:12:15 Yeah, yeah.

KYLE

1:12:17 Let me check with them. Okay? I honestly, I don't mean to blow you off now.

JOHN

1:12:22 You're fine. You're fine.

KYLE

1:12:23 She's like I'm actually heading to Delaware tomorrow and I'm gone for like the rest of the week and okay cards enriched. Yeah, it's we're here there and everywhere.

JOHN

1:12:33 Okay. So if...

KYLE

1:12:34 You...

JOHN

1:12:35 Do you think you'd be able to talk to them this week or no?

KYLE

1:12:38 Yeah. I can talk to him this week. I actually will probably all towards more as a, another column about something else. So, yeah, I can bring that up. Okay? Would I be able to give you...

JOHN

1:12:46 You a call on Friday to see if that's something you'd want to do next week or?

KYLE

1:12:50 Definitely give me a call. Yeah. Do you have my number?

JOHN

1:12:53 I know. I'm assuming I do, because I know Catherine had it, right?

KYLE

1:12:57 Yeah, she called me like 100 times. Yep. Yep.

JOHN

1:13:00 Yeah, I should have it there. Yeah, I got it. Yeah. So I'll what I'll do is I'll email you a recording of this meeting. So, if you want to show that to them, you can I'll email you some the Quickbooks videos... so you... so you guys can take a look at that too. And then you'll have my contact info. If you have any questions before Friday, just let me know. And then, is there a time on Friday that works best for you for like a five minute call?

KYLE

1:13:28 No, I'm kinda here there and everywhere, if I can answer, I can answer, if not, I'll call you right back.

JOHN

1:13:33 Okay.

KYLE

1:13:35 Yeah. You never know where I'm going to be at either I'm underground and a sister and her, I'm in a meeting or?

JOHN

1:13:40 Yeah.

KYLE

1:13:42 Can I give?

JOHN

1:13:43 Call at like one o'clock try you then?

KYLE

1:13:46 Yeah, be good. Alright. Okay. I'm on my way home at... at that time.

JOHN

1:13:50 Okay. Cool. Last thing I didn't cover was, and that just kinda reminded me of being an assistant. We do have offline capabilities for the mobile app. So, if you guys are in addicts or in the middle of nowhere, they can do their work. It just doesn't send the information back to the office until they have service again?

KYLE

1:14:07 That's huge. Yeah, because, you know, one of the biggest, you know, complaints I have right now is everyone tries to call me but they can't get a hold of me because again, these rainwater systems that we represent or the company we represent, the systems are in every new building in the seat of the sister and... and usually the... the skin and all the equipment or down and like the fourth floor of a underground parking deck. So gross sales stakeholders zero anything. Yeah. So that's huge.

JOHN

1:14:36 Yeah. Yeah. We... we have that in mind when... when developing it. This, I mean, a lot of people don't... don't have service when... when you guys are working on stuff, but, okay, I'll... I'll send that email out by the end of the day, if not first thing in the morning. And then I'll... I'll... I'll give you a call on Friday at one.

KYLE

1:14:51 Alright. Sounds great. I appreciate it, man. Alright, have a good one. Kyle. Alright, you too, John, take care, man. Bye.

The End