



ServiceTrade Demo with TC Lyon's Electric, LLC

Pat Osbahr with Lyon's Electric, LLC and TC Lyon's Electric, LLC
Recorded on 11/15/22 via Zoom, 1 hour 5 min.

Participants

SERVICE TRADE

Pat Osbahr
Territory Manager

Ashley Williams
SDR

OTHER

Conference

Lynn Thoreson

Tom Claas

Topics

<i>Next Steps</i>	38:44
<i>Pricing</i>	48:24
<i>Pricing</i>	55:13
<i>Pricing</i>	59:59
<i>Wrap-up</i>	1:03:25

Transcript

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

PAT

0:00 Hi. Can you hear me?

CONFERENCE

0:01 Hello, can you hear you? Can you hear us?

PAT

0:03 I sure can. How are you all doing today?

CONFERENCE

0:08 Good. How are you doing?

PAT

0:10 Hi, I'm doing just fine. Let's see here. And is this Lynn, yes, right?

CONFERENCE

0:19 And then I also have Tom in here with me.

PAT

0:22 Okay. And Lynn, you're the one that originally spoke to Ashley, right?

CONFERENCE

0:28 Correct.

PAT

0:29 Okay. Cool. Tom, what's your role there with the organization? Perfect?

CONFERENCE

0:37 And I run the service department that's what I'm looking at this?

PAT

0:44 Awesome. I saw you guys have on the website. There's a photo with a number of trucks there. We, this is just specifically for the service department though, right?

CONFERENCE

0:56 Yeah, we have far more, we have far more traction than what around that picture. So.

PAT

1:02 Okay. I work with the customers that have to up to eight to nine tests. So, when I saw the picture, I was like, no, do they need to go to the larger account guys? Are we in the right spot? So it sounds like though for what you guys have right now?

CONFERENCE

1:17 Yeah. All those guys are not service guys.

PAT

1:20 Yeah, yeah. Good deal. That's perfect. It's nice to know that you guys have, I can just, that shows that you guys have a pretty large build out though. So technology I can imagine is important to you guys and strategy and organization will also be important as well, right? The type of company you guys look like.

CONFERENCE

1:44 But let me just start with this point. We are not a residential contractor. We are not set to a guy solved and doing, you know, a little service calls, feel it's we're commercial industrial base and our guys do not price things on site. We do all of our billing from the office. You know, we're not just guidance, taking charge cards, you know, onsite when he's done with the job.

PAT

2:16 Yes, we're...

CONFERENCE

2:16 Looking for some software that will integrate with the accounting that we have and be user friendly in the field, but be user friendly in here also.

PAT

2:31 Yeah. Okay.

CONFERENCE

2:32 And Computerease is not that.

PAT

2:37 Yeah, I've been here and as you know, some, yeah, I think it's just, it probably was a good tool when they built it, but from what I hear.

CONFERENCE

2:46 That.

PAT

2:47 Yeah, it's definitely outdated at this point, it... so.

CONFERENCE

2:54 It was built with just what I was explaining in mind the you already heating contractor plumber that's going out and doing a little service call and getting paid immediately.

PAT

3:05 Yeah.

CONFERENCE

3:06 Yeah, it was designed for that type of... contract or not what we do?

PAT

3:13 Did, did the, was it the way that you guys landed on Computerease to begin with? Did you guys have it like in the Construction or commercial or the Installation side first and then use it for the service side or did you guys bringing in for service side or how to?

CONFERENCE

3:29 What we did, we have Foundation prior to this?

PAT

3:32 Okay.

CONFERENCE

3:33 We've had computer is for a year and a half. And our whole reason for switching to Computerease was for the service module that they sold us on. And daddy would do everything that we wanted to do, but they're really good about not giving you the ability to really work with something prior to buying it because, you know, they don't want anybody getting their own proprietary information. So until you go to say, you can't even hardly play with it. So, yeah, it's all kinds of questions and it does not do anything like they sold us on. And that was the whole reason for switching from on Foundation. We would have never switched otherwise.

PAT

4:18 Yeah. It now, as you guys are looking at new software, is it going to be an issue if you don't have a sandbox to play in? Like, so you're describing what we would call a sandbox account. So, like before you guys actually work to sign on with the new service provider, field management, service provider, is your goal to get your feet wet with the tool first before you purchase it?

CONFERENCE

4:46 We want...

CONFERENCE

4:47 To see what it can do, I'm not gonna go. Okay. Again. I've already done that. I brought up a software program for Foundation for service that they sold us on. And that's a piece of crap. Then we switched entire accounting softwares to Computerease just for their service module and crap. So I'm not buying another piece of crap.

PAT

5:09 Yeah. Fair enough. I totally understand well, it, I'm more than happy to kinda walk you through pretty much everything that we have. And I think what we have here too is pretty is laid out pretty straightforward. The only time it gets tricky is, you know, when you're you know, have like... a company that has a... not like Haiti HV AC... electrical, or fire something that's like, you know, gates or I don't know a weird workflow where we have to find a way to make the assets that they're mold. But with you guys and electrical, and I was looking at the website with the work that you guys were doing. I don't see that being a problem and our tool is built for service contractors with the service contractors workflow at heart. So especially I was looking at the notes like the, it seems like majority of your work is on contract, right?

CONFERENCE

6:07 We do a lot of contract work, but we also about 30 to 35 percent of our work is done as time of material service tickets.

PAT

6:18 Yeah.

CONFERENCE

6:19 So it will call it a one third of our revenue is generated by service tickets. That service ticket could be 150 dollar service call or it could be a 50,000 dollar deal, small project. Yeah, there's no rhyme or reason to necessarily. It's more driven by the customer as to whether it gets set up as a service or a, we call this job for Construction.

PAT

6:51 And we're built for both. So I'll show you today how, you know, we'll walk you through. How you guys, could, you know, I'll be also a while, you are, you're also one contract and you have preventive maintenance schedules that you're following up with the specific customers or at least some sort of routine quarterly or yearly checkup with the Installation that you guys might have? How you guys?

CONFERENCE

7:14 Why that? We don't do a lot of, you know, general maintenance that way?

PAT

CONFERENCE

7:20 Schedule it's, the customer calling and saying, hey, I need this done. I need that done. Okay. We send an attack a ticket. They all have their tablets and they get the ticket. They go to that job. They do the job, they need to build, fill out, you know, materials, you software off your truck... their hours and added description into there. We don't have customers signed the tickets. We don't we've never seen the need for that. These are all customers that we work for a long time. So, okay. You know, we don't worry about that, but they need to be a little, will log their time as well as mature. Every truck has five to 10,000 dollars worth of material on it. If they pull up a couple of 100 seat number 12 wire or a couple of orange square boxes or whatever it might be settings, they need to be able to log that on this ticket. So, we basically have a spreadsheet of the way we're doing it. Now, the spreadsheet where they can go through and enter the, all the material that was, you lose internet ticket, or that spreadsheet. You'll have a couple of 100 different items side, all the basic stuff. If they pick the material up from suppliers, that automatically goes to a job number. So that's not critical. But we need to be able to log the old material that to use. Yeah. And then they send it back to the office and we can build it from that point. But we want something that will integrate to Computerease. So that when they send it back right now, we're getting it back on a spreadsheet. We have to manually take all of those costs off and drove into Computerease. Is we're trying to eliminate steps?

PAT

9:10 Okay. And right now, you guys are that spreadsheet, when it comes back to the office, you guys are then... going through the inventory and actually marketing each piece off in Computerease.

CONFERENCE

9:26 Well, we're entering those job costs into that specific service ticket. Okay? Yeah.

PAT

9:32 Okay. Gotcha. And then you're just following along with the job cost and utilizing that... with your, okay, cool. What do y'all, do? What is the contracts? What are y'all doing with the contracts there? What are y'all, setting up with those?

CONFERENCE

9:45 We're not even we're in our contract. We don't have any issue with is just the service.

PAT

9:49 Okay. So.

CONFERENCE

9:50 This is our contracts are annual completely differently.

PAT

9:53 Okay, perfect. Alright. What else is top of mind outside of, you know, having the connection, the information flow back and forth? Is there anything that you guys are seeing out in the field that you guys need or anything that you guys are doing outside of, you know, the inventory stuff that's double entry or problems you're looking to solve their, before we kinda dive into the tool well?

CONFERENCE

10:14 Looking for simplicity for the guys in the field because we don't need them scrolling through 250 items to find, you know, every I item that, you know, that specific job. So we needed a little more streamlined for them. It's something that seems kind of bring, listen to sense that they're able to just complete that information, you know, efficiently and...

CONFERENCE

10:35 You know.

CONFERENCE

10:35 At...

CONFERENCE

10:36 Right now, on that spreadsheet, it's broken up into categories. It may be broken up into a category of wire. So they go on there and it's got all the different wire sizes, yes, say since got all different sizes and types of things. It's got conduit, all the different sizes and types of time. So they could, you know, really easily just scroll through. Okay, I use 10 feet that, this, you know, I use the 100 feet of this. I use six of these for them. You know, it's really easy for them necessarily in a Bill that's easy, but once it comes in here, it's not so easy. Yeah. And it just slows down the billing process.

PAT

11:14 Yeah, you have to look at multiple places for information, right?

CONFERENCE

11:18 And move things multiple was.

PAT

11:22 How are they? How do they access in the spreadsheet? That information out in the field today? Do they have a tablet or laptop?

CONFERENCE

11:29 They all? Okay.

PAT

11:31 Good deal.

PAT

11:35 All right. Are you guys just in the process of doing your evaluation right now already have a goals that like, hey, we want to get something in here by a certain time?

CONFERENCE

11:48 We don't have a timeframe we'd like sooner rather than later, but we gotta make sure that whatever we're doing, we've looked at a couple of other ones also, and we have not found one that is even close to being what we're looking for?

PAT

12:04 Okay.

CONFERENCE

12:06 Goals and I've looked at BuildOps. Yeah. Yeah. And that's useless again, plus.

PAT

12:13 What, what did you guys not like about BuildOps? If you don't mind me asking?

CONFERENCE

12:17 I mean, it was not what we're looking for, the operator we are looking for. And then the...

CONFERENCE

12:25 Integrating.

CONFERENCE

12:26 Yeah. And it did not integrate with the time with Computerease. They said they were working on integrating with Computerease. And then just across the, but it was ridiculous like brothers.

PAT

12:40 Yeah.

PAT

12:44 Yeah. And when I can share more on the Computerease integration if you guys actually want to know more about like how it integrates, we have a accounting specialist. Her name is Tania, either Tanya or abandoned probably be the ones that would kinda lead that conversation. But I know it's a push some sort of push from our tool into Computerease. We have a connector tool that we utilize for that. So, but I would definitely lean on them to talk more about the technical side of how it integrates. I know that we have the integration piece there. So it's just depending on how you guys want to do it. I, I've actually from what I heard last week, actually, I'm... about 50 percent of our customers decide not to integrate and they just do a

manual import, but there is the possibility. So we'll go through the process of showing you what it looks like to integrate before we even talk about any other ways that are that's available. And she's very good at laying it out how it integrates. So I'll definitely lean on Tanya into, to talk more about that. But I can imagine since you guys have looked at multiple tools, we know so much about the Computerease and Foundation. There you are, I would imagine the decision maker here at the end of the day for what tool you guys decide to bring in there.

CONFERENCE

13:56 Between Lynn and I guess.

PAT

13:58 Okay, perfect. And Lynn, you're the controller, right? Okay. Good deal. So, you know, everything going on there?

CONFERENCE

14:07 Control.

PAT

14:08 Yeah.

CONFERENCE

14:10 Okay.

PAT

14:12 Good deal. I think Tanya was actually a controller for a mechanical company before we brought her. I think she used our tool at the company beforehand and then we brought her on here. I think we might have stolen her actually because of our expertise... but yeah, she's really good and obviously, you know, BuildOps is expensive. Do you guys have a budget in mind for what we're...

CONFERENCE

14:36 I would look like. I'm not, I mean, this is like going into a car dealership, and so terminus we got to spend today?

PAT

14:44 Yeah.

CONFERENCE

14:46 To get something that works with it? Yeah, I mean.

PAT

14:51 Or standard?

CONFERENCE

14:52 Tell you, I'm gonna spend this much because then all of a sudden your product just became that much.

PAT

14:57 Yeah, I totally understand. It's just a couple of questions, right? That they want me to cover every time. So I put this into the notes on the back end but not...

CONFERENCE

15:04 That's not.

CONFERENCE

15:05 Truck yesterday?

PAT

15:09 Let's not put the horse before the wagon, right? So, I'm totally okay with that. We're put the wagon before the horse. Yeah. Okay. So, and so, how did you guys find out about service trade? Just curious to know what kind of background you guys?

CONFERENCE

15:26 Yeah. Well, I got my.

CONFERENCE

15:26 Email from you guys.

PAT

15:28 Okay.

CONFERENCE

15:29 Last week or something? Email popped in and I sent it off to Lynn and I said, look into this and.

CONFERENCE

15:36 And here we are.

CONFERENCE

15:37 Hello?

PAT

15:38 Perfect. Well, it's good to know those emails are still work in there. So, alright, so let's start which is the quick background of service trade. Give me one second and we'll just talk about, you know, what service trade is. And I won't spend too much

time here because I'll actually show you what it is. But just to give you a highlight, let's go here we go and let me know whenever you see my screen here of the pipes. Okay, good deal. And I will preface this today. So I'm not the most text savvy person in sales type products. So, and I learned this tool relatively quickly especially for my limited knowledge of technology. So I just say that when you talk about simplest, yeah, the field, I would be probably what your average technicians understanding of technology might be. And so if I can, and I always say like you guys are playing fantasy football or if they're ordering and stuff off Amazon or anything like that, they're going to be able to navigate our mobile app extremely easily. So, but then you guys in the office will learn it with no, no breeze. But... this is just a couple of our clients. We actually just had our 1,000 and third customer brought on I think last week. And I can imagine now since I've seen a couple of people get signed on this week, we're probably up to like a 1,000 to 10 or so. But that to say, you know, we have resources available or references available for you guys and we are all throughout the United States and Canada, but we are a service or field service management tool built for commercial service contractors. And the idea here is to help you guys may be more valuable to your customers, help you guys grow and scale your business there. And we know part of this tool is that, you know, especially in the last few years, there's been a decrease in the amount of skilled labor that's available for companies, for electricians and for H back technicians. And you know, anything pretty much mechanical electrical across the board. So, you know, what we're trying to do here is make sure that you guys are able to operate more efficiently that you're able to get the most out of the resources that you have today. And you're able to do the most billable work for the current customer line up that you guys have. So, you know, how we're going to help you guys operate more efficiently? No two pieces there help you schedule more efficiently depending on geographic location or the style of work and who the technician is that needs to be on that job or even just service calls that are coming in and making sure that we're able too put it in the right place so that it doesn't you know, obstruct our current schedule of work that we already have, and we're doing it efficiently for our guys out there in the field. We also wanna make sure that if there are opportunities to do additional billable work for customers while we're on site today, that we find problems why we're there that we're able too... document that, you know, get it to the office, have a quoted and the way our system is built that, you know, you can actually have it so the guys on the field can quote or you could just push everything back to the office like you guys want to have it where it'll tonight.

CONFERENCE

18:55 The field guys in the field in that world?

PAT

18:57 Perfect. Yeah. So we can have it. So the information will flow as long as they're self-service if there's not self-service it's built off of basically the way it works is the moment that they get back into self service, the information will populate. So you'll get an email as quickly as the as a data is available to your staff out in the field. So, I'll show you that here in a little while to how the, how quickly the information can flow back and forth and your office can quote it, get it to the customer as soon as possible. And they can even pay you guys with the credit card if they're readily available or you guys can, except checking cash, and I'll show you how we can do that as well. But helping you guys operate as efficiently as we possibly can.

CONFERENCE

19:35 Yes, all of our stuff is invoice, like I said before.

PAT

19:38 Okay.

CONFERENCE

19:39 It comes back here. We don't take charge cards. They get invoice, you know, in a perfect world about a week or so after the job is done, we gotta vendor invoices to come in. They would get an invoice from the office there. And then the invoice will get emails are sent to them.

PAT

19:58 So mainly, you guys are getting paid off of checker, AC. H.

CONFERENCE

20:01 Yeah.

PAT

20:02 Gotcha. Gotcha. Okay. Yep, very simple process and we can show you guys our invoices as well and then kind of give you a walkthrough the whole tool and see if see how you guys like that. And then we could talk about the Computerease integration with the invoicing after the fact here today. But... the other pieces here, right? Trying to make sure that we're able to help you guys find and retain your, you know, the customers that, you know, one appreciate the work that you guys provide over the value or the cost of the service. And it sounds like you already have a number of those clients today that definitely appreciate the work that you guys do over maybe what you guys cost and the relationship that you guys have. But then, you know, help you guys find and attract more prospects with the ability to make it more customer centric and make the process, I guess what we call it like the Amazon effect, right? Just being able to keep your clients notified and up to date with everything that's going on out in the fields that they feel overwhelming customer service presence from your staff. And then this is the other piece here. And what we found here is at the top performing companies in the industry are turning quotes for repair quotes that they find on preventive maintenance jobs or just routine service jobs. You know, they're finding additional work 25 percent of the time and the reporting that and getting quoted 50 to 60 percent of the time. So we built what we call the deficiency loop to help with this for anything that you guys might find in the field as a repair opportunity, to get that to the customer as fast as possible, to increase the amount of revenue.

CONFERENCE

21:34 Again, that is not the way we operate. So, I know where you're going with that. And so so many of service companies today, they take and the service techs are altered all training upsell and find his problem, find that problem and so that we can charge the customer more that's not the way that we operate. The customer calls us. They want something done. We go there. We do the job. We need to build a documented if my guy, fine thing, you know, that needs to be repaired when he was there. 99 percent of the time the customer just gonna say fix it. Yeah, I go. We don't

quote a lot of stuff. This is service stuff. This is timing material, 90 percent of it we go there, the customer needs something done. I'm not quoting. So I just need something that we can document all of this, what we did materially use an hour's use instead back end. I'm not looking to recreate the wheel here. I'm looking for something pretty simplistic. Okay, you may.

CONFERENCE

22:48 Of...

CONFERENCE

22:48 All this, all this stuff that this can do. But what I'm telling you is that I don't really care because that's not the way that we operate that I'm not gonna use that.

PAT

22:58 Okay. Fair enough. So from high level, would you wanted to just look like from the beginning of a service call, how the process would go if you guys got call by one of your customers and they said, hey, we have an issue with the generator today. We afraid wires, somebody who's come out here and fix this or it's not working. It's down kind of figure out what the problem is and then walkthrough how that would be done? That kind of my getting the right, just there.

CONFERENCE

23:21 Yes. So our customer calls and let's just say that they call, like you said, got to generate generator is done. We write up a ticket. It has the customer on it with the address. It has the contact information for the, you know, it may be that maintenance manager there or whatever his contact name, phone number and wouldn't description of what they called in for on there on the ticket, we send it to our tech. He goes there and Mutual with whoever may be looks at finds the problem. Then he documents on there what he actually did. You know, we make sense there and make just say check problem with generator. Then here it's into his description at the bottom opened up generator found you'll burn connections, repaired, burg, connections, you know, whatever, and puts down annualized whatever you as you needed. A couple of toggles that had burned off. Those are added into this material list and he had three hours of labor at the bottom. Does he sends it back to us? We invoice simple. I got you.

PAT

24:47 Okay. So this is our dispatch board. The reason I'm showing this is say that we got a call here. We just wanna see who's available. So that's why we would utilize the dispatch board just to come through and see obviously you would have this many technicians, but we would just see, you know, if I'm available from for instance, we're gonna use me today as technician, say that we've got a call. We're going to schedule it at three o'clock so we just check and see if I'm available or who might be available here. We come to add job. We could type in the location. I'll use the PJ super store today. I think I put us bluffton. So I would actually change this information. But for the start for the process, they will just keep moving forward. I'll put it as an or emergency service call or urgent service call. We'll schedule it to myself. We'll put it down for today. We'll set it at three PM. It'll just automatically put last thing for one hour. We'll leave the obviously, you can change that. And then we'll put, you know, generate or not working?

PAT

25:57 Let's see if I put the generated here. There, it is the generate generator and... we'll just put fix problem. Alright. And now from here, we can go ahead and save that job... and see how it went out and schedule it. So we can open it up directly by hitting details. Let's see. And this should be our work order here. So here's our work order for the job. If we knew what needed to be added, you know, in terms of parts and labor, we can go ahead and do so especially like the labor, like we probably already know what that is per hour. So we could go ahead and put that here and... at least save that. We can add any additional information. But now that the job is scheduled here, we'll go ahead and hop out into the field and I'll show you what this looks like for your team. Your technician. Let me open up my service trade at.

PAT

27:07 Give me one second. I'm in my... apologize.

PAT

27:18 We have two sides to this one's for fire and life safety in once mechanical. And I was on the fire and life safety side. So there we go. My phone should be popping up there. Can you guys see my phone?

CONFERENCE

27:30 Yeah.

PAT

27:31 Alright. Now, disregard all the work that I haven't closed out here, but open it up here's. Our work order for today. So we can see the services are there's a problem with that generator? We can see, you know, this is where our job items would be. So when you're talking about anything, they would have to use off the truck, this is where they would come to add anything that they might find for this job. So let's say, you know, that they came up and they found that they were afraid wires, right? So they can type in the type of wiring that they might use. I don't know why it's not pulling up. Let's see if there's a... and we can enter, you got your parts information here as well. But I'll just pull up something random... what's something that goes into a generator on a, you know, for like frayed wires or something. You guys typically see a part that would be utilize the service?

CONFERENCE

28:30 Yeah. Just put in your wider and see what's what gauge, where it comes up. I CD 10 gigs wire cool.

PAT

28:37 Well, page where, yeah, we use that and then they can come obviously, the item price gets pulled in but they can change the price if need be. And then they can notate ethics came off the truck per technician, the warehouse or even parts vendor, and they can notate where they got it from... based off the store.

CONFERENCE

28:55 There's no, there's no spreadsheet of any sort on here. It's just stay put it in wire in a bunch of different where it comes up and they gotta scroll through and find the correct wear them.

PAT

29:06 Yes, or if they knew like it was it, you know, they knew it was the 12 gauge. Why are they could put in 12 gauge and it would pull up that as well. So it's based off, you know, whatever they start typing into the reference, how it'll pull that information up. And now, in terms of spreadsheet and information that will be a lot are available in here, we can upload your parts. So anything that you guys typically utilize on a daily basis, we can upload into the tool. So all that information will be in here. So you don't have to, if you guys want to refer back to the spreadsheet, you can throw all that information directly in as apart... for your service team so that when they come in here, they can just go directly.

CONFERENCE

29:45 Yeah. The only issue, the only issue I got what that is because that's how Computerease operates to our operating on theirs. And it takes the guys so much longer to go through and have to enter in all of this stuff versus being able to scroll through on a spreadsheet and you click on this part and dog 10 of these.

PAT

30:07 Yeah.

CONFERENCE

30:08 This, is that an input you'll be typing in the descriptions of all these parts because a lot of these parts of multiple different names to show you, one one guy calls one part and another guy across the different parts of the same part. But it might have three different names. And then, you know, you're... so, but you're saying that's the only way that it works.

PAT

30:31 Yeah. Yeah. I mean, from what my understanding is, once you guys upload your parts, it's just based off the parts list that you guys have sent to us to upload. And it could be called the, whatever verbiage you guys utilize to call that specific part, just however you guys send it to us, how we upload it for you is how to go into the, to the tool here?

CONFERENCE

30:52 Yeah, there's no way to categorize that listing. So like they could say wire and then they would get all the items that are wire.

PAT

31:03 That's what I was thinking. I was surprised that it wasn't well there. So if I put it in wire, it just pulls up everything related to why or why it was doing that immediately. So that I guess that's does that answer that? I mean, typically, how that would be done? Like if I were to put in H back, right? Anything that was where the H

back will get pulled up as well, or if I was to put, let's see if I put generator. So anything related to the generator or let's see pipes.

PAT

31:39 So, you can search it generally, but... it'll just pull up everything related because it's based off whatever you're typing in as a reference.

CONFERENCE

31:49 And there's no way to customize that.

CONFERENCE

31:52 Just quoted.

PAT

31:54 Yeah, it just how it comes in. And if we implemented in for you guys?

CONFERENCE

31:59 Why don't you and I, you know, you don't want all the parts in there, but I'm just, there's no way to categorize it and customize that part of it.

PAT

32:08 That's a good question. I don't know from what I understand, this is how, you know, you would just search the part that it is... and that's how it pool. Yeah. So I can ask that question, but I don't know how you would do it because there's nowhere to like filter this, if that makes sense other than just typing in the description. So I would feel like there has to be some sort of filters.

CONFERENCE

32:32 Yeah, because I'm thinking like anything related for wire, we would have to edit this wire and then the description after, so that they could search wire and they are.

CONFERENCE

32:43 Exactly. And then national, that's where I live or fittings, and all things come up whichever way that our spreadsheet is designing. Now, it's all categorized or hardware. Yeah, and you'll have all the different screws and nuts and bolts network, so.

CONFERENCE

33:01 I think it would be how we had it in the categorized when they upload it. So, if we had everything starting with wire and the detailed description after, then they would be able to get the list. Okay? Is how I'm foreseeing that would to be.

CONFERENCE

33:18 Okay. Well, I mean, I wouldn't be the worst in the world.

CONFERENCE

33:23 Yeah, you would.

PAT

33:24 Just type in the, yeah, yeah. And then...

CONFERENCE

33:28 It would be okay. So say.

CONFERENCE

33:33 Alright.

PAT

33:36 So that's that would be the process for adding job items or adding stuff. They need to add additional time or whatever outside of just clocking in and clocking out of the job, they could add their labor there as well. And for your answer like that, they would just hit that plus button and they can add the quantity of how many they utilize. So, I guess the biggest issue would just be the workaround with the naming system and category categorization of the tools. Because even whenever you go into the office view and you add a piece like that, it's built the same way. So they look the same way on both in. So once you go in, you were at a wire on the, in the office. Once you start typing in a wire, it's going to pull up all the pieces that are related to wires.

CONFERENCE

34:20 So now after we do all that we ended, guy enters in all the material that he was, and he sends his ticket back into the office. The cost of all of that material will integrate into Computerease or populate into Computerease and put that saves job 39 12. And he's got 106 dollars and 12 cents with material. This is going to show up in Computerease under that job, correct?

PAT

34:57 Yeah. Under job two, seven, three three, nine, zero eight one. So pull the job number in and build the invoice based off of that. And it'll be a manual push. So what does it have to be a manual push? It can be built so that it will pull information like every 30 minutes, any new invoices or work orders that have been built or it can be done so that every time you guys do it, you can go in and actually hit the connect. It's like a little button that you can hit that connects it directly into Computerease. So it'll pull all the information that's been uploaded since the last upload. Yeah. So here, once we've done that... let's go ahead and just update the work... internally... and... log out of this. So I wonder if because we, but we had to add... that's just the labor. Let me add an item here first so we can get this pull back across. So let me add the wire... will use the gauge war and we'll put 10 of them, are four of them whatever. And there we go. So we can actually see how the information gets pulled across. Let me go back to here. And then the office view... there's your information. So it pulled away the cost per unit cost for that wire. So this would be your job. All your technician would have to do and the field say he completed the fix and he got the generator up and running. You would just go in and notate, you know, what do you, what he had worked on? And then close out the job. Once you close out the job, you'd

get a complete green box right here saying that he finished the work. And then all you need to do internally as complete job and then send the invoice link or pass it over to Computerease. And then send the invoice out of Computerease. If you know, if that's how you guys want to end up doing it, you know, they, which it sounds like that's the end goal to the invoice out of Computerease. So you would just complete job internally. So, so obviously you want to know that the job is completed in the service module before you invoice, right? So that's how you would make sure of that. And then... you wouldn't go to obviously create invoice unless you wanted to have the invoice live in both places which you don't have to send the invoice. So you can create the invoice within service trade and save it... so that you guys can track it here as well. And then, you know, go back. To invoices here and have a place where you guys can track invoices and put the payment information in as it's paid. But from here, you know, you can if this doesn't work with service or if the, with Computerease. So you guys would disregard that, send to accounting system. There be an extra built-in portal basically that you guys would utilize for the manual push into Computerease. And obviously here, we got a big issues that we'd have to make sure we update our pricing to make sure we're not losing money on these jobs. But this is a nice piece for peon, L for you guys to utilize internally on job by job basis.

CONFERENCE

38:15 So, how does the service technician? Is it by hand just saving it, telling us that he completed the job because what if he has to go back yet? Yeah, great question.

PAT

38:27 Yeah. So when he's done, he can complete the job as well and go back later. So I'll show you this once these in the work order, my phone wants to... come up here.

--- Next Steps ---

PAT

38:44 There we go. So say that he's completed the job here.

CONFERENCE

38:47 Yeah.

PAT

38:47 All all he needs to do... is when he clocks out a job. Well, that, that's probably where I messed up that. So when they get to the site, we have clock in and clock out. So he would just need to clock into the job. And then when he has finished clocks out of the job and it's gonna ask him what he did that day. So we're going to say that he marked off the completed service here for that generator repair hits next. And then he'll say, are you done with this visit or not? So you can keep it open if it's like a multi day job or if they weren't finished and it's you know, seven PM and they need to go home and they'll just come back the following morning, finish it. But if they want hit, yes, what that will do for you guys internally is one, it'll check it on the dispatch board. So you'll see that the job is complete, but also it will let you know here on the actual... work order, let's go back to the job.

PAT

39:49 They'll let you know that it's completed there.

CONFERENCE

39:53 Okay. And by hand clocking in and clocking out to spam account, forgets labor hours or is that just for sake of dispatch board?

PAT

40:03 No, that's for internal labor hours where to make sure that you guys are charging correctly or not under charging for the work that you guys are doing so well. It'll also show you here so you guys can follow up with that.

CONFERENCE

40:15 I mean, he can modify those hours. Okay? Not because you're in here's. Why you say that he leaves one job and had some next customer and he's heading to is paying that drive time. And yeah, he was, unless he was still hop on the ticket before he left the other job. You know, he may have 45 minutes the drive time that customers, but next customers band for that. If he just clocked in when he got there, you know, you wouldn't met, you guys are not going to go on this ticket more than likely until they're leaving that job, you'll they'll fill it out as they're leaving. They're not gonna clock in. So, okay, does that make sure they can, you know, put their hours in accordingly? You'll day left this job at 10 o'clock this morning and ahead of, you know, to it. And, yeah, two o'clock this afternoon, you know, that they can put in four hours into their.

--- Next Steps ends ---

PAT

41:13 They can update the labor hours in the job items. If that's one way you guys want it done. So they can actually go into the items and parts and labor and all that information and change that. In your case, you know, I would just because you guys aren't going to be immediately, you know, quoting and invoicing this for the work, I would just tell, you know, either you come in here and just add the additional time by clicking that button and adding it in here or you guys can just tell them to keep it open until they start the next job, right?

CONFERENCE

41:43 Okay.

PAT

41:44 And then in either way, like if you guys actually wanted to keep it, see how we have GPS locations.

CONFERENCE

41:50 So...

PAT

41:51 Yeah.

CONFERENCE

41:52 Loved already give him a new ticket.

PAT

41:55 And then it's going to be tied to the next job anyway because they're going to be started, the you'll see, you know, where the location was when they start the next job. So either way they'll tied to a location when they clock in and clock out. So that, so it would work either way and you, since you're going to be, and this is just an internal way for you guys to make sure that you're not losing or we're charging for too much. This isn't shared with the customer. The only thing to share with the customer is going to be this labor our here and that's if you guys want it to be right? So we can even filter this information. So that is group by service and that you guys have it set up so that they could see just a line item or they could see just the, you know, the total Bill, the grand total. But yeah, this is just basically for internal purposes for your own billing purposes and also just accountability purposes because, you know, some companies have issues with where the technicians clock in and clock out of and how much time they're actually spending on jobs. So just making sure that that's counted appropriately. Okay. Yeah... you guys can also reopen work internally here. So if there's something you need to go back in and add that maybe somebody in the office had already closed out for any reason, right? You can actually go ahead and reopen any job. And then your technicians out there in the field... they're going to have access to that as well. So if they need to add additional information on closed jobs, they can come in here and they can see anything that was completed and they can go in and add additional information like pictures if they wanted to or if they had receipts, they needed to upload anything like that, they can do so as well.

CONFERENCE

43:34 Yeah. I think it was, we Bill end up filling that service ticket or they prohibited from being able to modify that from that point?

PAT

43:44 Like in the, are they able to like add more information to the tool?

CONFERENCE

43:48 Yeah, I'd be, we don't want them to like add to it accidentally. We already have that.

CONFERENCE

43:54 Yeah, it's gotta get once they submitted it's gonna be busy locked down so they can't access it again.

PAT

44:00 Yeah. Well, I don't know that there's going to be the ability to completely lock them out from that, but I mean everything is going to be built or you guys to, before the invoices ever sent out, you're going to have the ability to review it in the.

CONFERENCE

44:12 But, but two weeks from now after his Bill, they could go back on there and...

CONFERENCE

44:18 We close that work ticket out.

PAT

44:21 Yeah, yes. Yeah, yeah, it's actually a really good point, you would... all the jobs will be marked for how they see here. Let's go to bluffton. You would be able to know that all the jobs for bluffton were completed. So if something got added there's an issue. So you can see all the status of your jobs. It's going to, even if they go in and add more if they can't reopened the job. The only places that information can be reopened is from the office. So all they can do is that information, but they're going to be adding additional, you know, parts or whatever to a complete a job. So you guys would already have invoice for it. And unless you resubmit the invoice, right, the price is gonna, it's gonna stay the same.

CONFERENCE

45:15 Is there a way though that once they completed their job and we invoice them to remove it from there?

PAT

45:23 Good question. I don't know that... like from the completed job?

CONFERENCE

45:30 Yeah. What if we don't want them to be able to see it? Because obviously, I would think that would get kind have cumbersome if you're going to have, you know, 3,000 jobs in every year. They're gonna keep populate is completed.

PAT

45:45 That's a very good question. I'm not positive on that. I can ask and see if it might be just a permission setting, you know, so that, yeah, it might be just something that we turn off or there might be like an actual window that they're able to update it, but let me ask that, and I will get back to you on that because I'm that's a very good question from my understanding, right? And I totally understand where you're coming from, you're not gonna want them to have to one see it, but also worry about... they're being this much information and they're completed field. So they would all.

CONFERENCE

46:18 Hello... we added to the wrong job because there's the pga jobs out there and we are the invoice 10 of them.

PAT

46:28 Yeah, I totally understand that.

PAT

46:35 All right. That's a question I will definitely ask for you... Lynn.

PAT

46:45 And I wonder if there's a will there's a lot of permission settings in the back end for the mobile app. Like you can also set it up for them to schedule work. Because I saw you guys are 24 hours and that was actually a question. I meant to ask you. What do you guys do a service work that comes? You guys have a call center for that or does it get pushed to?

CONFERENCE

47:02 Not at all. Center and vendors that are on call?

PAT

47:05 Okay. So that you guys don't need the ability for them to schedule their own work. Do you know after hours? Okay, good deal. So, yeah, for something like that, there's like settings on the back end that we can turn on and off. So it might be just something as easy as... you know, setting a limit on the completed work orders, we're going ahead and complete turning it off. So they just the unscheduled and schedule work. But in that case, they would have to let you know that there's something you need to add and then they will need to be uploaded from the office.

CONFERENCE

47:37 Yes.

PAT

47:38 Yep. Good deal. Alright. And so that's you know, from where we're at there, that's pretty much the high level walkthrough of how service job would come in, how you guys would add the information, how would come to the office? And then from here, you know, how you guys would invoice for the work. So you can build the invoice internally without actually sending it, right? So if you guys wanted to save an internal invoice, you can do that. And then from here, all you would do is just connected with the Computerease of the back end connector and you would either hit push or allow the information to pull every so often. And then it would populate with this job number here.

--- Pricing ---

CONFERENCE

48:24 Job number, it's adjustable.

PAT

48:26 They are not. Yeah, those are all built off... our internal system. I've had that ask the number of times like could you start with number one? Right? No, unfortunately, that's just how our system works. It's going to be that 2002 1,000,000, whatever that number is.

CONFERENCE

48:46 So it just automatically starts at that with it too.

PAT

48:50 Yeah, you can look at all the job number. Is actually, I believe that they're just... yeah, I don't I guess, yeah, they probably just go... numerically. So whatever one is next in the rotating number line, it's pulled in.

CONFERENCE

49:14 But do we get to determine what number to start with? And then it just goes up from that point?

PAT

49:19 No, it's J generated in our tool?

CONFERENCE

49:23 Okay.

PAT

49:24 Yeah. So it's going to be populated by whatever work order comes next and what number gets associated to that?

CONFERENCE

49:31 Okay.

PAT

49:32 Yeah... that's the question I've been asked to a number of times. And then like for those instances where you guys have guys picking up stuff out in the field from a certain location, they need to put it in a po. A lot of them just use the job number. Is the po number as reference?

CONFERENCE

49:54 Yeah. Okay.

PAT

50:00 Do you guys have any other questions around that I'm scheduling, invoicing, anything else? You know, how customers are both? You guys want to see that? What else can I show you?

CONFERENCE

50:14 No, I mean, like I said, we're pretty much focused on just a service ticket. Yeah, you know, the rest of this stuff really just, we don't have any issues with data off. The scheduling part of that really means very little. Me... it's all in the service ticket.

CONFERENCE

50:34 As far as the integration though with Computerease, exactly, which fields does it bring over?

PAT

50:42 Good question. I have some information on the integration. I think I have a Computerease video I can send to you. I don't wanna say it'll be completely wrong, so I can shoot that to you and then let you look at that. And then if you guys want to have a full, you know, dive with Tonya to talk about the Computerease integration, that's probably the best use of our time. Okay? Yeah, because she can straight up walk you through it and kind of give you a back end of what it looks like, what the connector tool looks like and how the information flows. And she knows much more about it than I.

CONFERENCE

51:16 Sure. Yeah.

CONFERENCE

51:18 So, now, the biggest question is, how does this, is this something that we pay that we buy upfront? Like with Computerease or is this something we get Bill? You know, so much per user? You know, what's the cost on this? And how is that calculated?

PAT

51:39 Yeah. Good question. Let's see. Let me find my pricing sheet here... there. She is. So with you guys, if you want to do the integration with Computerease, is going to be a custom integration. So we'd be starting to with the premium plan. So you guys are looking at 130 dollars per technician and this is per month, but it's build annually. So... it is paid upfront for 12 months. There is an implementation fee. I believe for the premium platform. It would be in the ballpark of 3,500. But what that's also going to entail as you're setting up your locations, your contacts, everything under the Bill to ship to information, all your parts information.

--- Pricing ends ---

PAT

52:27 If you guys up, I think that there was something in the notes about tracking assets. Is that something you guys are interested in onto?

CONFERENCE

52:37 When I was discussing with Ashley, I was discussing as far as the inventory inside of the band. So, okay, then being able to designate what they were using.

PAT

52:47 Yeah. And you guys could run reports within service trade based off the jobs that will pull that information for you, just associated directly into the inventory

utilized on each job or jobs over a specific time period to track that information. There's not like an automatic inventory counter for you guys. So there's ways that we can do that... in the, so the asset something completely different from what I thought about then this is more internal information or internal assets, right? Internal parts. Yeah. Gotcha. Okay. So outside of that, we won't worry about an importation but it would just cover, you know, everything from the front end. And then it would also be the training involved and the training modules that will go along with that are step-by-step walkthrough of how to get your guys into the tool, how to leverage the tool. And then what it will look like for your staff in the office as well. And then, you know, obviously it comes with that 24 emergency support too. So your team in the after hours, we'll definitely have privy to our staff if anything goes wrong late in the late in the mornings or late evenings there. So what you guys are looking at here and if I'm correct, where you guys have eight technician?

CONFERENCE

54:02 I think we're about eight service guys.

CONFERENCE

54:04 Yeah. But the problem is they want to ask a little, all those guys work a lot of times like that. And you know, all the guys at some point during the service, I guess it's you know, there's certain guides that are specific to service, but just about everybody from time to time, we'll do a service ticket.

CONFERENCE

54:25 Are those licenses concurrent or are they per person utilizing the software?

PAT

54:34 Good question there per their per user. So if you guys, you know, if you were to, if you needed more technicians to have access to the service side of the house here that are doing service work, you would need to purchase more licenses for those technicians to have access to go ahead and, you know, at work orders and see work orders and do anything out in the field with it. There are help her license. So maybe that's a way to get around it. They have limited access. So it could be good for guys that are just doing, you know, service tickets here in there that could be considered helpers for the service department. So I, we could definitely talk more in depth about that.

--- Pricing ---

PAT

55:13 I'm not totally sure how much the access is limited, compare to just their normal technician that has full access in the field, but that might be a way to limit the cost but also provide some sort of access to guys that are doing some service work but not all of it.

CONFERENCE

55:30 Well, the other option I just thought of is that we do that premium plan for all the service guys and which would account for probably 90 percent of the tickets...

and the other 10 percent we do the way we're been doing them for now. And I mean, it's a whole lot less volume that I have to... emails versus buying another 12 licenses at almost 1,700 dollars a year.

CONFERENCE

56:05 Right.

CONFERENCE

56:06 Random. Yes. Yeah... lower 20 grand time ago. Yeah.

PAT

56:20 The other piece to this is the integration with Computerease. That's why I say, you know, definitely put the... wagon before the horse here. And I must say, I don't know if I'm saying that, right? Whatever, but with that, yeah, with that in mind, does the start, do you feel like the service tool would fit your needs? I hope that I did an okay job of presenting that to you. I apologize to kinda felt like I was bounced around a little bit here, but do you feel, how do you feel about the tool?

CONFERENCE

56:53 I mean, I've from what I saw, I think that part of the war.

CONFERENCE

56:58 Okay. Okay. That's very simplistic... in our workflow for the technicians and assigned. Yeah, we're very simplistic and I can tell that the system here offers a lot more interesting interested or whatever they do more than what we actually use it for.

CONFERENCE

57:21 Yeah, we had, we don't need all that stuff.

PAT

57:24 And to that point too, I will say, you know, like we work with customers that have 300 trucks, they're doing, you know, projects all over the place that are multi day, they're doing what they're doing some contract work. They're doing all sorts of different 1,000 jobs. But then we also work with small mom and pop companies, right? Who they're literally just trying to get away from paper and need a place to organize and track their work. So that's I think that's kinda the idea of the tool was built to have something that was extremely simple and form but could also be complex depending on the workflow of that specific organization. So hopefully I did an okay job of showing you guys how simple it can be. I, you know, typically on these demos, I have a process that I usually go through and obviously you guys had, you know, an idea of what you wanted to see here. So I hope that I was able to show you that. So that's good to know that at least the service side you feel like is a pretty good fit. Now all that to be say that here's the other piece to this. The... and I don't know how many companies are doing this out there. But the Computerease integration definitely need to walkthrough it and show it to you from a pricing standpoint. It starts at 6,000 dollars per year for the integration. And then the setup, I believe it's

5,500. So definitely need to make sure that... you know, that's that the service side is going to be benefited from the connection that you guys would have to pay for on the Computerease side and the majority of that. So the Computerease... it's done through a third party company. So they set their price and the implementation is based off the manpower hours that will go into setting up the integration and getting information put it incorrectly.

CONFERENCE

59:17 So not only do I have 1,700 dollars roughly around numbers per tack per year, I have a 6,000 dollar integration fee to integrate with Computerease?

--- Pricing ends ---

PAT

59:32 Yes. Yeah. That's the price for the custom integration... from their tool to ours. And that's going to be the, and I believe that's build separately. So it's not one Bill straightforward, but it's billed through. I think it's built through Computerease... or whoever the connector tool is. Let me see if I can find this real fast.

--- Pricing ---

PAT

59:59 So, yeah, if I was gonna put a total on everything it's probably going to because I have it at, do you guys have eight technicians? If we just do eight licenses you guys were looking at for that? Yeah, yeah, I was gonna say I'd probably some are just the same ballpark around 23 grand for the first year.

PAT

1:00:25 And the way it's broken down for the... connector tool for Computerease. It's 50 to 50 and that's for 30 hours... of the setup time.

PAT

1:00:42 I'm trying to figure out who it's billed through.

CONFERENCE

1:00:50 Yeah.

PAT

1:00:56 Now, I know a lot of companies and, yeah, it doesn't sound like this is something y'all want to do, but a lot of the companies that we work with, they get away with just setting it up and completing the work within service trade and then taking the information that needs to be in Computerease and just building a new invoice for, in Computerease with the work order number and attached to get whatever parts and labor was utilized as well with the grand total numbers.

CONFERENCE

1:01:21 What we're doing now just don't work on work.

PAT

1:01:24 Yeah.

CONFERENCE

1:01:32 All right. Well, I think we've got enough information for now to... discuss here. And currently justifications for product costs, yeah, 6,000 dollars seems like a lot of money.

PAT

1:01:50 Yeah.

CONFERENCE

1:01:50 Ration, but I guess when you look at other than ours... and the number of tickets that we process a year, you know, it adds a couple of dollars a ticket maybe.

PAT

1:02:08 And I think in total, you know, for recurring file after the first year prices, the first year implementation costs, you guys are probably looking somewhere around like 18 between 17 and 18 per year.

--- Pricing ends ---

CONFERENCE

1:02:24 Do, is I've booked a trip charge to... buy boxes card integration fee in the credit card.

CONFERENCE

1:02:32 Yeah.

PAT

1:02:36 Do you guys want to? Actually, I think what I would need to do, it would actually be to, so we have like an internal channel for Tanya because she's extremely busy since we only have to accounting people for the entire company. So they're on a lot of calls. But would you guys want to set up some time that we could walk you through the Computerease integrations to at least you have a full scale of what that will look like?

CONFERENCE

1:03:00 Sure.

PAT

1:03:01 Okay. What are some time? Let me pull up Tanya, his calendar and let me just, I'll share some times that she looks like she's got. And then we can see what you might be available. Definitely need to get a couple of, so I can reach out to her with a few that will work. But maybe.

CONFERENCE

1:03:17 Yeah, because the next couple of weeks between Tom and myself, we're both gone notifications and with the holidays. So I was just about to say, I limit.

--- *Wrap-up* ---

PAT

1:03:25 Thanksgiving next Thursday, we're in Turkey. So nobody is going to be available then. So I is next week probably not doable...

CONFERENCE

1:03:36 Next...

CONFERENCE

1:03:37 Week? Yeah, next week would be fine. Yeah.

PAT

1:03:39 Okay. So she's off Wednesday but it looks like she has time... we pull been in here as well. It looks like she's available on Tuesday at two PM and you guys are in Wisconsin, right? Okay. Are you guys Mountain Time or are you guys?

CONFERENCE

1:04:00 Central...

PAT

1:04:01 Okay. So you're just an hour back? So it'll be one one PM your time. It looks like she's available or we could do?

CONFERENCE

1:04:09 No, they don't work. Wonderful day.

PAT

1:04:12 Yeah, let me just, let me double check that because I still have to put it in the, since they have a, you know, a slack channel for them, we have to actually put in a request. So I have to put it in. I'll put it in at that time and see if we can't go ahead and get her scheduled. And if something doesn't work out, I'll get back to you and see if we can get some more times for the following week is a much more wide open after thanksgiving, but yeah, let me get to work on that. I'll see if we can pull in next week and then we'll go from there.

CONFERENCE

1:04:43 Sounds good.

CONFERENCE

1:04:44 Alright. Thank you. All right.

PAT

1:04:45 Thank you guys for your time. I appreciate it.

CONFERENCE

1:04:47 Sure.

PAT

1:04:49 You have a good afternoon.

CONFERENCE

1:04:50 You too.

PAT

1:04:51 Bye bye.

CONFERENCE

1:04:52 Bye.

The End