ServiceTrade Meeting with Advance Industrial Refrigeration

Joseph Summerell with Advance Industrial Maintenance and Machine Inc
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Participants

ServiceTrade

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Topics

Transcript

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

--- Pricing ---

OZELLA

0:00 Hey, Jay, how are you doing? I'm good.

JOSEPH

0:05 I believe that we were not selecting the maintenance interval.

OZELLA

0:11 I did that. I promise you, I did.

JOSEPH

0:14 I certainly did.

OZELLA

0:18 I'm like a solid 95 percent. Sure that I did. I'll give myself the five percent wiggle room just for the fact that it was late and I know I was like probably cross eyed on my computer doing a 1,000,000 things.

--- Recurring maintenance ---

OZELLA

0:33 There's a five percent chance that I missed it, but I'm 100 percent sure I clicked the interval. I was like, I wonder if I need to push something in order to trigger it.

THALES

0:41 And I click on.

JOSEPH

0:43 Then that we were selecting the quarterly interval and really the testing part is only an annual thing.

--- Recurring maintenance ends ---

OZELLA

0:48 So, maybe it was the wrong interval selecting an interval. So I think it was, I was selecting the wrong one. Okay? That makes me feel better because I was like, I know I push that button. Something else is going on here.

JOSEPH

0:59 Yeah.

OZELLA

0:59 Okay, cool. Hey, Chris.

CHRIS

1:02 Hello?

OZELLA

1:04 So, you know what you guys might be better at, well? Want on. Let me...

JOSEPH

1:09 See if this is gonna work for me. I've got contracts and assets, so pulled out rate a role to show.

OZELLA

1:16 Awesome. I'm just trying to do this. So me and iOS devices, I'm getting better, but I'm trying to see if I can do it. Let me just do it really quick and make sure...

JOSEPH

1:27 You've started to screen share, but it doesn't show an actual screen share.

OZELLA

1:31 I feel like I click to Zoom man. Like there, it is. Okay. It just took a minute... but why is it? Okay? Does yours do that? Does it make you have to like tap out to make?

--- *Access to information* ---

JOSEPH

1:47 Yeah, because it's just that's the swipe down thing to get it to pull up initial.

OZELLA

1:51 Okay. So that's all normal. Okay. All right. Well, then now, I'm comfortable, that was easy. So I just push the button, select the thing. I've been doing it from my android for all this time guys and I upgraded my situation.

JOSEPH

2:09 Nice. I like the apple on a lot because I can just mirror onto a different desktop and then.

OZELLA

2:16 Like...

JOSEPH

2:16 Clean desktops, and it's a lot smoother. I don't have to like stop a share anything.

OZELLA

2:21 Hey, well, that's interesting. I'll have to learn to do that because now I'm doing it, but it's just my, it's just showing my one. Like it's just this and then.

CHRIS

2:33 You, you use mirror play, you don't use quick time?

JOSEPH

2:38 I use a thing called air server.

OZELLA

2:41 I just push this button with the screen mirror and this is what's happening. So I push the button and now I have the place.

OZELLA

2:54 I'll continue to explore that, but I was very pleased to know that now I don't have to. I mean, I used to have to do some really fancy footwork with my android.

--- Access to information ends ---

JOSEPH

3:05 Yeah... Duncan, thalas, how are you doing?

THALES

3:10 Good. How are you?

JOSEPH

3:12 Doing great... hope you all happens the same beautiful weather that we are in the carolinas. Duncan's probably got a little colder out there.

DUNCAN

3:22 Yeah, it's a little cold tomorrow supposed to be a fun day. We're supposed to get like 15 mill meters, rain and 15 centimeters snow. So, who knows what the like that means?

OZELLA

3:31 I was about.

JOSEPH

3:33 Say, I don't work well in metrics.

DUNCAN

3:36 Yeah. Well, those two cancel each other out. And so everything's just gonna be ice. So it's going to be a great day tomorrow.

JOSEPH

3:42 Well, fantastic. Awesome.

THALES

3:46 Well, I've got a couple of...

DUNCAN

3:47 Faces.

JOSEPH

3:47 On our end, Chris kid, well, here, he's the red headed fellow.

--- Purchase decision ---

JOSEPH

3:54 He is our director of sales for the east coast. So, as you all are kind of finalizing your evaluation of service trade, if you're trying to stay on the same time frame that we talked about the other week of making a decision in February or very beginning of March, he'll be able to help you all while I am out on my honeymoon and whatnot, so wanted to just get him in the loop and get him up to speed with our conversation.

--- Purchase decision ends ---

JOSEPH

4:18 So he's going to be joining us today. And then we have Ozella. She is what we call a solutions architect. So really when I have complex demos and things, my technical abilities don't quite reach. She is the lady for the job.

OZELLA

4:37 Nice to meet you everyone.

THALES

4:39 Nice to meet you.

JOSEPH

4:42 Mind kinda going around and just saying who you are and what you do so that they can get a little bit of a background on that as well. That'd be great.

THALES

4:49 Yeah. I mean, let me go quick on that. So, TAM is around the company, Brenda. She's our processes person. She documents the process, make sure everyone is doing the same thing every day. Duncan is in marketing, but he's he also helps with the technology stack. So every time we have a tech knowledge change of some sort, Duncan provide super, and they decided to change the often operations come based for the three of us.

--- *Purchase decision* ---

JOSEPH

5:24 Other options that were at the HR show, what are the other options you compare?

THALES

5:29 Us again. So we looked at ServiceTitan, BuildOps, FieldBoss... and... who am I forgetting? That was one more... what are your thoughts on?

DUNCAN

5:47 Pro?

THALES

5:48 Yeah, Simpro. Okay. How are things going along with them? A couple of them? Not a great feed... built of feet.

THALES

6:11 Not great pricing service type, Frank Stein. Yeah... field bars, great season. These guys are ahead of everyone. They are like a head but it requires a lot of change in the business because we have to change the accounting system. And Simpro, pretty nice, awesome price. Looks like they know this stuff. Not sure if we do everything we need to do, but... we're not sure yet if you do everything we need to do.

JOSEPH

6:59 Sounds to me like it's kinda between us. So FieldBoss and BuildOps.

THALES

7:06 Yeah. You guys. So you guys price is okay. It's a little bit pricey, but, you know, that's not the main point here.

--- *Purchase decision ends* ---

THALES

7:20 Your main sue I believe is the checklist report that's something you have to, you supposed to check on for that? We don't want our guys leaving the app to go to PDF outside and a safe combat. If this is the only thing you guys can do... it's, going to be a problem. We have to be able to do that with, yes, no filling up stuff in the app, right? And now I stay save in there.

JOSEPH

7:52 Yeah. So we have that functionality set up a demo for you today. So really what we have planned out is I was gonna go through to start.

--- Assets ---

JOSEPH

8:02 I was gonna go through how to do contracts creating as what they're tracking that sort of thing, assets. And then as we transition to, okay, once I have my contract and my asset, how do I apply the proper PM checklist that's where Ozella will kinda take over. So we can talk about how to relate that checklist with a certain PM and then, and all that.

--- Assets ends ---

THALES

8:28 Exactly. And that's the main thing I'd like for you to spend time on today, how that works and then brand to do some questions.

JOSEPH

8:41 Sounds like.

THALES

8:42 All right. How to do it?

JOSEPH

8:44 Then to, all right, so I'll go ahead and share my screen here. So I am in my service trade account.

--- ST app contracts and pricing ---

JOSEPH

8:51 I am underneath a contract. So I just took this standard pricing contract that I have here in service trade. This can be hey across all our companies. This is what our standard contract looks like. I can have specific item prices in there. I can have contract rules. So cost mark up rules... any additional charges that need to be added onto a job underneath this contract with the cost mark up rules, I can create groups. So if it's like between one and 100 dollars market up 100 percent or I can say, okay for this specific part, it cost the customer 500 dollars whenever it's used things like that. So what I Ed from here to create a specific PM contract for a location is I took this contract and created a child of it. So I can then have that exact contract copied for costco specifically, and I can go in and make specific terms and conditions or alter a couple of things on labor pricing or certain parts. That sort of stuff I can create starts on day ends on review, on dates to kick out notifications to the salesman to say, all right, when it comes time to review this, let them know they need to go get a renewal signed. And then it'll also track my expected margin versus my actual margin based on the invoices that I've sent out underneath this contract. So you can start to see holistically how well the contracts doing compared to what you expected it to do.

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

JOSEPH

10:35 Sort of questions you'll have about that.

THALES

10:42 I don't have a, it's pretty straight for I'm just taking notes, Brenda, do you have an?

DUNCAN

10:50 No, not yet.

JOSEPH

10:52 A...

THALES

10:54 Lead is on mute or frozen. I can't tell, okay, you on mute. We can't hear you.

THALES

11:04 Not on mute. I mean, your microphones are working.

--- ST app contracts and pricing ---

THALES

11:11 I just keep going.

JOSEPH

11:14 Another cool thing you can do with these contracts is if I go into edit this something, I forgot to mention, I can apply it for a specific job type. So if this contract only covers the PM calls but not any emergency service calls, you can have it automatically funnel things the proper way.

--- Assets ---

JOSEPH

11:34 Cool. All right. So now, let's kinda move on to assets. So at each location, you'll have your assets. If I go to... let's say I'll go to my cosco and then to cosco and Raleigh from the location page, I can add an asset. So I can say, okay, we have a... boiler or a chiller... and I can add the make model.

--- Accounting ---

JOSEPH

12:03 So number all that in the UI if I want to. I can also do that through the UI and the mobile app. Now, for doing this in bulk, then I could come up here to customers and bulk import.

--- Assets ---

JOSEPH

12:15 And this is where service trade has really good bulk import capabilities. So I can bring in location and assets, recurring, services, prices, things like that in bulk. So I can go to assets and then select the asset type that I want to bring in. So I'll just say a bunch of rooftop units, and then I can download the template so you can bring in assets in bulk.

--- Assets ends ---

JOSEPH

12:39 This will be part of the onboarding process. If you have some of this already built out for certain customers or if you want to do it more holistically, we can, or if you just want to... have a salesperson build out the template during their walkthrough, then you can just suck it all into service trade at once for a larger customer. Any questions there?

THALES

13:08 No, I'm good.

JOSEPH

13:10 Cool. And I can send you an article that has all the different types of assets. We can bring in the templates, if that be useful. All right. So then from there, when it comes to an actual job, I'll go back service trades, homepage. Let me find a job at costco Raleigh.

--- Forms ---

JOSEPH

13:39 So, and to get the proper form to dispatch on a job, it's really simple. So when I go into the job itself, I have my services, let's go in and add a service to this job. I can use a template and I have them set up as forms. So ours, in order to have the proper form dispatch, we set up our template as service forms, hvac, PM. So based on the description that you set it'll, have to be tied to the right description for the right type of job, and then it will dispatch the form accordingly as a notification to the technician to say, hey here's, a new form that's been dispatched and I'll let a take it from here to kinda show you how that works. But essentially, to have the proper form dispatch, it's just a set of words in that description for the service.

OZELLA

14:31 All right. Thanks, Jay. I think the only difference between us is gonna be I'm doing, I'm gonna do an apa form, but it's the same process. I think that's what I have set up in my demo. I also have, I think I have PMS in my forms library in any case. So we can always.

JOSEPH

14:53 And keep in mind, we do have some, what we call starter kits for these forms which we built alongside our other commercial and industrial refrigeration customers. But if you want to do custom forms and make them look however you want with whatever data you want to collect, we can certainly do that.

--- *Forms ends* ---

OZELLA

15:12 Great. Thanks, Jay. All right. So I have a mobile job here. Can you guys see my screen?

JOSEPH

15:21 We can.

OZELLA

15:21 I think I saw a thumbs up. Awesome. All right. So I'm clocked in on this job and I can see a description which is pulled through from the quote that was initially set out.

--- *Assets* ---

OZELLA

15:33 I can see who's on the job and all of that good stuff. I can also see what services are associated with it. I can also click in a little bit further to those services to see details for the type of work that I'm going to be doing while I'm on site.

--- *Tech On-site* ---

OZELLA

15:48 Any specific comments attachments or anything like that are associated with this job. Now, I'm gonna, I'm going to be a little bit impatient. There's gonna be a banner that typically pops up and it'll go ahead and notify me that my form has been dispatched and it's ready. But I'm actually just gonna.

--- Tech On-site ends ---

JOSEPH

16:06 It'll keep it from sending that notification while you're sharing. I had to go in and change a bunch of settings. So it would do that.

OZELLA

16:14 Okay. Well, I'm just coming straight over here and I'm gonna let it happen on this screen. So I can go ahead and pull up my dispatch for that particular one.

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

OZELLA

16:27 All right. So here's my form and it's for the same job that I was just clocked into and I can go ahead and I'll just go through my workflow right? And entering hoops entering my truck number, and I might not actually.

THALES

16:44 Use...

OZELLA

16:45 Voice note like that. Here we go. And I'll select the unit. So the way the forms are.

--- Assets ---

JOSEPH

16:53 In Ozella. But one thing I do want to note is up top on that form, customer location and all that pulls over from service trade. So as long as that's up to date in the service trade database, that will pull live over from that, it will also understand which assets are there and just pull over however many assets are supposed to be on that location for this type of.

--- Forms ---

OZELLA

17:19 Awesome. Thank you.

THALES

17:20 Hi Jay.

OZELLA

17:21 So once everything's pulled over and you'll notice that as we move through the form, there are a number of fields where data can pre populate. You can also make decisions about which questions you want to be required. There's conditional logic that will also appear throughout the form so that it can help kind of drive that behavior.

--- Assets ---

OZELLA

17:40 And you'll be able to see that as I'm moving through it, I can search for a particular unit by either scanning the bar code or typing in the name or certain details. And that smart lookup is going to go ahead and pull from any series of values there. I can click directly into the asset that I'm dealing with. I can enter in the details if I need to. But all of this is going to be pulling over from that asset in service trade. And then I can go ahead and enter any information that I'm collecting while I'm on site.

--- ST app contracts and pricing ---

OZELLA

18:15 And then it'll also do some calculations for me. If I'm adding any refrigerant, I can also say that I can log what was removed... and it's going to go ahead and calculate for me. In my leak rate. It'll it could potentially send notifications. So if it's a leak rate that is above a threshold, say, for example, 10 percent, we can configure it to send a notification to the customer or to someone within your business to alert you that it has exceeded that threshold, right?

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

OZELLA

18:52 In this particular form, we have it set up to add items back to the service trade job. So when we get back there, I'll show you what that looks like. Same thing here. I can go ahead and enter some values... volumes added removed. And once we've finished and it's a similar workflow, right?

--- Forms ---

OZELLA

19:15 Whether it's an EPA form, some other inspection, a chiller, or boiler, a PM checklist, you'll basically be able to go through the flow in a very logical manner, select your asset that you're dealing with, fill in the information and then get ready to submit your form. So I went to submit the form and it's given me an error because I missed something, right? So I have those green circle indicators that show me how my Progress is for each asset and the required questions in a section. But it's not gonna let me submit a form. If I have a required question, it's outstanding. And it brings me directly to that question so that I can go ahead and finish filling it out.

--- Tech On-site ---

OZELLA

20:03 Only at that point, can I successfully submit the form. And so now my dispatches are complete and I can head. Back over to my job. What's going to happen when I'm finished here is everything is going to load back in service trade. So I can clock out. I can say that I'm done with that particular service.

--- Access to information ---

OZELLA

20:28 Maybe I'll be back for another part of the visit and I'm gonna go ahead and stop sharing and come to the office view so we can see how everything translates. Do you have any questions before I move on? All right. And we can see my screen. Fantastic. I'm now back in service trade.

--- Access to information ends ---

OZELLA

20:52 So kind of similar to what you were looking at with Jay and I just stopped over in this location page. I'm not gonna stay too long within some of these screens. I know you all have seen this before but you can see what it looks like when you create, we create deficiency.

--- Quote templates ---

OZELLA

21:10 When you look deeper within a deficiency. This is what your view is gonna look like and write within a deficiency. You can create a quote and that's what I did. In this particular case, I went ahead and I created a quote. I added some services using service templates very much like what you saw from Jay, and then I submit and send that over to... the customer is going to get that quote, an email in a really nice kind of PDF interactive format.

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

OZELLA

21:37 They'll be able to review and approve that quote. You can set it up to outline those prices and fees in a way that suits your business. In this case, I have it detailed by line item. You can have it by type. You could have it just as grand total. And then when the customer approves, you'll see a nice approval stamp. If they are required to include a po or anything like that, it will show up. You'll also see the date and time. And of course, this was approved because my customer was sent the results from that inspection that I did, right?

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

OZELLA

22:15 And so they're able to see the proof that, hey, your lead rates high. They got an email, maybe something that I customize to say, you know, you need to get a retrofit or repair immediately because your great is severe.

JOSEPH

22:32 I just want to clarify something here. This is the kind of output that the forms application spits out. So you have that list of questions of yes, no. And then like, for instance, if it says, does this, does the system look good? Yes or no? And you answer no, then we can have subsequent questions that say, okay, why not take a picture that and spit out the deficiency.

--- Assets ---

JOSEPH

22:54 But then all of that also spits out to a PDF that can then be shared with the customer and stored with that job.

OZELLA

23:04 That's right? And...

JOSEPH

23:07 Functionality all are looking for?

DUNCAN

23:11 Is there any other refrigerant tracking reports? Like, can we see like for a given client how much refrigerant has been used? Where... like the number of units or the number of times we've added refrigerant to a certain unit?

--- Forms ---

OZELLA

23:28 So that wouldn't live within a standard form or within this form, but the data that is collected here can be sent to different destinations. So, if you're wanting to look at that data, right? And to be able to eventually run some sort of a report and we can work with you to scope out what that needs to look like and whether we need to be sending those data points to, you know, a spreadsheet database or something like that for you to be able to do your own type of reporting, then that's certainly a possibility.

--- Parts management (inventory) ---

OZELLA

24:02 Typically, the way customers are handling that today is by looking at job items directly within service trade, right? Within the core application where we just were and being able to do an export on items. And then they would specifically be looking by item code for their refrigerant items to see. Okay, well, when was this used? What job was it for? And it would be a detailed export... okay?

JOSEPH

24:31 Run a report for this specific system. Show me all the jobs that were done on it this year, export all of the job items used on that system to a spreadsheet. And then based on what you input on the form, it'll have the items as refrigerant used, and you can just run totals on that or that sort of thing.

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

JOSEPH

24:52 There are ways we, there are ways we can make it more sophisticated, but that's kinda the basic way a lot of people are doing it today.

JOSEPH

25:03 How are other people tracking that sort of a refrigerant usage?

DUNCAN

25:09 Not well. So that's why we're trying to figure out the best way to do it.

THALES

25:12 Yeah. Most don't is on after that.

OZELLA

25:19 So, does the solution that we presented for that? Does that sound like something that could work for you all?

THALES

25:26 Yeah, sure. It's probably the most complete one we have so far on that particular, sure.

OZELLA

25:34 Great. That's really good to hear. All right.

--- Quoting ---

OZELLA

25:37 So, we've gone through and we have gone out to the site. We've done an inspection. We've recorded our league, we've recorded refrigerant added. We have captured a deficiency. We've alerted our customer. We've sent out a quote, that quote was approved from that quote. We created a job.

JOSEPH

25:58 So now we're kind of transferring from filling out forms into more of the project management functionality. Are there any other questions you'll have on the form side of things?

--- Forms ---

OZELLA

26:13 It's fairly intuitive.

THALES

26:15 Yeah. We still have to see how these forms are built and how they got added to the equipment, right?

OZELLA

26:22 See how I'm sorry, say that again. So how the forms are?

THALES

26:26 Like how can we make the forms... for each type of equipment?

DUNCAN

26:34 Like how do we build the checklist?

OZELLA

26:36 Got you. So we work with you on that. We have a collection of standard forms that are readily available, but we can also do custom forms according to your spec. So if you have certain checklists that you prefer to use, then we can work with you on that. Then we use a form builder to create that mobile form that you saw through my mobile app, right? And we just organize the questions whether it needs to be a drop down required. We'll go through each of those specs and requirements with you for a given asset type, and then we will have that form mapped to that particular asset type in service trade so that it pulls the information. Would you like to see kind of how that works?

--- Forms ends ---

DUNCAN

27:21 Sure. But one question, first a form builder that you guys have to do that, that's not customer facing, so.

OZELLA

27:28 So it can be, we typically do it the first to go around to make sure that it's set up properly, and you're welcome to kind of ride along with that so that you all can see how the first build goes.

--- Forms ---

OZELLA

27:40 And then if you want to take over subsequent modification yourself, you're absolutely welcome to you. It's typically a very technically savvy customer that would take something like that on because of the middleware that required to make sure that what you put in the mobile form translates to the PDF and then creating the deficiencies and doing what it needs to do in service trade for this piece, particularly when we're just talking about, hey, I wanna do a form it's drag and drop.

--- Forms ends ---

OZELLA

28:09 So this is pretty easy. This isn't the hard part. What you're really paying for is the integration side of it and making that form more meaningful.

JOSEPH

28:20 I'd say 95 or more percent of our customers, they just don't have the technical capabilities to do. That. Sounds like all you'll do. So we're more than happy to give you the keys to the system. The last thing we want is for somebody to get in there and get confused, get frustrated and then just not use it.

THALES

28:39 We understand that's fine.

JOSEPH

28:42 Are you all familiar with Sterling industrial refrigeration? I imagine you'll compete with them.

THALES

28:50 I'm the only thing I know about these guys is...

THALES

28:59 I don't like them. So just skip that. Quiet. They work on a system here and we try to get help from them and they don't give a crap about it anymore. And we have a maintenance contract anyways. It's a.

DUNCAN

29:13 Hey.

THALES

29:14 Relationship there, but they out of North Carolina believe... what was that? Are they out of North Carolina?

JOSEPH

29:23 They're here out of Raleigh?

THALES

29:25 Yeah, good luck.

JOSEPH

29:30 Well, I hope your relationship with them improves, but they, or forms and they are real fan. They're big fans of.

THALES

29:39 Yeah, they screw EPA system here. Now, they attack, won't even help the guys. So now we're trying to redesign the whole thing because of them. So anyways, doesn't matter.

CHRIS

29:48 Yeah. Well, I think the point. I think the point there that Jay was trying to make is they can build their own forms. So, and I think you were asking the question and I think that I think we're kinda beaten somewhat of a dead horse, but they are capable of building their own forms. So obviously based off of your track record, if they're capable of building their own forms, you guys should be perfectly capable.

OZELLA

30:09 As well.

OZELLA

30:15 Fantastic. So... are we squared away on forms then? At this stage? All right, well, I'll move on to the project management side and kinda start talking more about how we're going to manage this job that we've created.

--- *Quoting* ---

OZELLA

30:35 So I had a quote here, right? And that quote was approved. I refresh it. You can see that it was approved. And then there's typically a button here that will say, add quote to job. So then I took all of the comments and it's got all of my items that came over in my services and it was able to immediately create a job for me.

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

OZELLA

30:59 When I'm creating that job, I can make a decision about what type of job I want to create, right? And in this case, I chose to create a job with a budget because this is going to be a project. It's gonna be a longer term type of engagement, right? This is not going to be an in and out TAM service. It's something that I want to be able to track my costs on. You want to track cost for everything. Sure. But when it comes to projects, there's a lot more that you're putting into it, right? So once I made that decision, I can see that I have a budget here.

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

OZELLA

31:33 It's unlocked. We'll get into that. Shortly, my description came over. I have one appointment set. And then if I want to break this up into several appointments, I can... I have my items over as well. And then I can also see the relevant assets and efficiencies if any that are coming over. One thing that's kind of valuable when we start talking about jobs and long time line projects, right? Is the ability to be able to filter. So when you have a project that's spanning over weeks or months even to be able to quickly get to say, hey, I just wanna see what happened last week, right? Then I can come and see what items were attributed to last week, whether it was a fee or equipment item or what have you. And then same thing. If there were any attachments and I specifically wanna see any items for next week or next month, even... what's scheduled for next month, what's going to be used next month right now? I have one item. It looks like my rental fee is going to be used next month depending on how you have that setup, right? So you can filter and it'll pull you to whatever relevant attachments or clock events or things happen. So it's easier kinda sort through. When I clear my filter, I'll go back to just a standard black and gray and view.

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

OZELLA

33:10 I have some attachments. That have come over from my quote, maybe pictures that I took while I was on site and I've got some paperwork right? Again, we have that PDF that's attached for us. We don't need to necessarily wait for it to load, but we can see that. So the next thing I wanna do is I wanna come in and I wanna actually examine this budget.

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

OZELLA

33:38 When I click into view my budget, I can see the overall value which is how much my customer is gonna be paying and I can see my budget total which is my cost. I can see my margin currently, my estimated margin. And then once I have any change orders, those will appear and my total will not be modified... right now because this budget is in draft mode. I can still edit it. So if I needed to edit the budget to add or remove something, I could do that here and those changes would be applied back on the service tree job. But once I'm feeling good about the budget, I feel confident and secure.

--- *Access to information* ---

OZELLA

34:23 This is what we're going to go forward with. Then I'll go ahead and lock it. I'm gonna take it out of draft mode and this is all permissions based, right? So there are going to be certain users that are going to be view only when it comes to these budgets and some that will be able to actually edit.

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

OZELLA

34:43 And then you'll also be able to come in and create change orders. So once your budget is locked, the expectation is you're not going to be locking and unlocking it. Anything else that needs to happen is going to come through a change order. So that change order may very well be that I need to add something.

--- *Quote templates* ---

OZELLA

35:03 Let's see. I wanna add some more. We're in a refrigerant mood today. We're gonna add some more of that and we're gonna add to service line. Let's say 10 pounds... and let's say someone number that's way too much. Let's not get crazy... that feels good. And you can add a comment.

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

OZELLA

35:31 And I'm gonna go ahead and create this change or so you can see what it looks like or what... you see the box here to send the customer for approval, you can have change orders that are internal, right? Where you're making a change to maybe labor hours or something internally that isn't going to affect the customers pricing or it's not going to require them to say yes or no to that change, but it might just impact your costs and you wanna make sure you're tracking that.

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

OZELLA

36:06 If that's the case, then you would simply uncheck that box. But if you do need to send it to the customer for approval... then you're going to be presented with this model which basically allows you to add attachments. If you need to add any additional notes, and then it'll send it to the customer so that they can then approve. And you can associate that with the job, please review.

--- *Quoting* ---

OZELLA

36:35 Once we've done that, you can see now we have a change order pending approval, it's highlighted and it's got this little visual queue here to let you know that it's waiting.

DUNCAN

36:45 Is that approval? Like the email comes through? It's just prove or decline and then automatically updates. So.

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

OZELLA

36:52 That's right. And I'm gonna show you what that email looks like. In fact, just bear with me.

JOSEPH

36:57 Very similar to the quoting process that we went through the other day, okay?

OZELLA

37:02 Same, yeah, it's gonna be the exact same thing. The same as the quote, the service link invoices... here. Here we go, change order requests.

JOSEPH

37:18 We're not seeing what you're looking at.

THALES

37:19 A...

OZELLA

37:21 Here we go.

OZELLA

37:27 All right. So I can see action required, new change order from my company leads review, and then I can view and respond... and then I can approve or request further changes.

OZELLA

37:47 Then it's going to require me to basically apply a digital signature of a sense and I'll come in and I'll put in my name, my email.

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

OZELLA

38:07 And I'll also check the box to say, yes, I reviewed, I approve. And we've got our familiar stamping date and time. All this is also gonna be visible when we come to our change order history. Let me give that just a moment, refresh. It. There we go. And now we have a checkbox.

--- ST app contracts and pricing ---

OZELLA

38:38 So it's been approved by the customer. We're now, good to go. As I'm racking up the change orders here. If I have multiple, then they'll be numbered. So change order, one, two three four five et cetera. Associated with the job... I can see the total for the change order. I can see the total, how that's gonna affect price. And then again, my budget changes are also gonna show up. When I look at my budget history, I can see the budget history directly, right? Who created it, updated, it, status changes?

OZELLA

39:21 Now, one thing that you don't see directly here, but I'm going to show you, let me just close this one out... is going to be our work in Progress. So right now, we are working on a qa for some features that are going to be deployed here in the next few months, some of them coming out sooner than others where you'll be able to write within that job screen, see your performance. So you can see your whip at a high level right there on the job screen. You can see your cost incurred. You can see your budget, how much you've invoice in that percentage to your expected revenue very nicely right here on the screen, you, our project managers can be tracking their completion, entering those rates right there directly on the job. I can view my budget, but I can also view my whip. I'm able to see that whip in more detail. So not only am I seeing my cost incurred, but I can see that breakdown and how much cost I'm incurring across materials, labor hours and labor dollars. I can see that breakdown even further for the job, looking at it by item type or by service. So in this case, I had three phases or services. And then I have my labor, my equipment, my material, all that good stuff. I can break it down and say, I wanna see my labor across the services, which is what we're looking at here. I can view that in dollars or I can view that by quantity. Then I can also say I wanna look at it by item type. So what would typically there we go? There? I had it ever. So, in this case, I can view it looking at the phase. And then what's my breakdown of labor equipment, material by service. So again, it's just giving you that much more of a granular view of how you're spending is accumulating over the course of that project. Do we have any questions before I turn it back over to Jay?

--- *Accounting integrations* ---

THALES

41:30 No, this project side is pretty straightforward.

DUNCAN

41:38 Does the purchasing for the project happen directly through here? Or how does buying like the materials for this project work?

OZELLA

41:48 So, and correct me if I'm wrong, you all are using Quickbooks. Right?

DUNCAN

41:55 Yes, we use Quickbooks, but currently, the POS are done through our field management software field point.

--- *Parts management (inventory)* ---

JOSEPH

42:03 It would be coming on the partsledger.

OZELLA

42:07 Yeah.

JOSEPH

42:07 That's another thing that I had just written down to kinda circle back to when it for when it comes to tracking the refrigerant on like a truck level and things like that. That's another thing that the service forms and partsledger will help you do like, hey, we use 15 pounds on from this truck on this job today and then keeps up with how much is left on that truck. So you have accurate views into that and I assume purchasing, we'll go through that as well, correct? As?

OZELLA

42:33 Yeah. Yeah. So you would be able to do that purchasing all through partsledger. So the reason why I was asking about your Quickbooks piece and just to kind of explain what that world might look like for you, right? So you'll have a job like this, right? And especially we're talking about a larger product, you have the ability to send that job to Quickbooks. And that way when you're actually paying against those purchases that you're going to do through the inventory module, you have a place to cost it against over in Quickbooks, because that's going to be a totally different side of the house, right? Like ap accounting. They're paying things. They're going to handle that over there. But in terms of partsledger, you're absolutely going to be able to use that module to generate your POS. It'll give you a po number. It will track your inventory. It will help you track inventory movements... for jobs and then also.

JOSEPH

43:30 For a...

OZELLA

43:32 And then also your main warehouse and then all of that will communicate back directly within the job.

THALES

43:39 Okay. So when we create purchase orders in the system there.

THALES

43:48 The, these purchase orders get exported to book. They don't or they just live here in ServiceTrade.

OZELLA

43:57 So, there's different points of connection with Quickbooks. But primarily what you're going to be looking at is one you have the ability to send the job two, you have your accounts receivable.

--- Invoicing ---

OZELLA

44:08 So once you're actually invoicing the job and you send that to the accounting system, you send the invoice to the accounting system, then it will also be recorded there. Then also we're talking about the purchasing side of it and your in partsledger. And if we do have time, J, let me know if you want to go into that or if we should schedule a follow up for it, but...

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

JOSEPH

44:33 If we can.

OZELLA

44:33 Do it. Okay? Yeah.

JOSEPH

44:35 We can talk about the purchasing and then potentially from what I understand there's a way to do like a stack from or what we call it internally there with all the purchasing.

OZELLA

44:47 That's right? So let me go.

THALES

44:50 So just so that, yes, if I create purchase orders in the system like a cpo, I receive items here.

--- Invoicing ---

THALES

44:59 I'm clicking this larger you guys are talking about. But there's a way for me, if I create 10 POS here, I can export those Quickbooks. So they get paid out of Quickbooks, but they all created here, they get export to Quickbooks. Is that a yes or no?

OZELLA

45:14 So it's not going to get exported directly into Quickbooks?

--- Parts management (inventory) ---

THALES

45:18 Okay.

OZELLA

45:19 Workflow would look like would be, I'm going to manage all of my purchasing in partsledger and service trade and it's going to like a sub ledger and I'm gonna show you that it's gonna have all of your INS and outs, you're gonna see the transactional detail. But when it comes to actually paying you're entering your vendor invoices in Quickbooks or not?

--- Invoicing ---

THALES

45:46 Like it's just like the system we have now. So we do all that. But then when we receive the Bill, we enter the Bill in Quickbooks, so we can pay information that we entered here service trade. Now, case to the sodpoint that information, whatever we bought, the amount, it doesn't go over Quickbooks. Okay?

--- Invoicing ends ---

OZELLA

46:08 That's right. You got it. You got it. That's right?

THALES

46:11 Yeah, that was a matter of.

OZELLA

46:13 Yep. Let me grab this job number and I can actually show you... what a po looks like.

JOSEPH

46:20 That, is that process a pain point of yours now? Or is it all good with that? It's the other stuff you all are really trying to fit.

--- Accounting integrations ---

THALES

46:28 Well, again, those are trade offs, right? We look at what the system does, what the system don't do, how the pacify financial system, the cost of the cost of using the system, those are the type of trade offs we make, not have that function is a little bit of a step back.

--- Accounting integrations ends ---

THALES

46:47 It's just because as we grow our number of purchase order created, they also grow... with the business with the place we start and then the building, all the manual entry is going to be done through it's. Going to be done with service trade by. This is the price we see.

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

THALES

47:05 And then we can get the Bill. We have to enter Quickbooks. And the problem we have today is very hard for us to itemize stuff in Quickbooks. Because you get the Bill, you're not gonna type all those 20 lines on your purchase order. We just enter one amount. Okay. Paying this Bill reference ServiceTrade. If you want to know what we purchase it, we have to go to service straight and look at that. So it's you know... maybe in the future there's a note is more labor you have, right? So you might have to hire a person to do that type of stuff part time.

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

THALES

47:40 So I have to consider that at the cost of your, of the life cycle of your casing side with our core, that's why we ask those questions because that affects our processes quite a bit how we go about it.

JOSEPH

47:58 Thank you for explaining that. Just, it helps me wrap my head around how we can help if I understand why you're asking the questions that you're asking?

--- Invoicing ---

THALES

48:06 Yeah, it's basically what you're looking at his double entry because and double is lost and lots of information between one season to the other. Because if I enter my items here in service straight, I can export them to Quickbooks. And then Quickbooks. I'm not gonna enter items again. Most likely, I'm just gonna enter view for part of something like this.

--- Parts management (inventory) ---

OZELLA

48:29 So, what's gonna happen, right? So when you're onboarding, you're gonna pull your items from Quickbooks or wherever they live currently. And then you're going to import them to service trade and then partsledger is going to become your source of truth for those items. And when you're doing your Quickbooks configuration for when Ar is getting sent over and jobs are getting sent over, that sort of thing, you'll be able to say, okay, when new items are created, it's not gonna go creating new items and Quickbooks, you're gonna have it drop them all in like a catch all bucket or something like that or?

--- Invoicing ---

THALES

49:09 Yeah, that's exactly how we do today.

OZELLA

49:11 Okay, great. So, so, yeah, so, so we're on the same page with that. Let me show you how this is all gonna work. Let's say here we go.

THALES

49:22 Anyways, there's no transactional. There's no transactional besides your invoicing, the accounts receivable. There's no other transactional information that goes between service tree and Quickbooks.

--- Accounting integrations ---

OZELLA

49:39 That's right. That's right now, like Jay was saying, we do have service trade accounting connector and we can work with you on a custom template because Quickbooks. I mean, it does have its own limitations when we talk about Quickbooks desktop allows you to import in certain file types in very specific formatting that we scope out.

--- Parts management (inventory) ---

OZELLA

50:03 And I have had those conversations before. So if that's something that is, you know, that is more of a priority for you, then we can absolutely kind of go in that direction and have that conversation. So, so it's not totally out of the question in other words, and typically, what customers will do is again, they're functioning out of the partsledger module as their sub ledger for those ap transactions. And then they're doing a weekly or a monthly, you know, journal entry to Quickbooks.

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

THALES

50:34 Okay. Yeah.

OZELLA

50:36 Yeah. All right. So, so I'm here in partsledger, there's a number of different options which you get trained on thoroughly during your onboarding with your PM, but I'm gonna focus on the purchasing in the inventory for this conversation. I'm gonna create a new po and I'm gonna do let's go ahead and I can order, let's say or... let that pass through the main warehouse... and let's say that I need some made in Canada and maybe I need some made in Mexico. And I might also need some made in. And for this particular job, I know that we did have see we had some wire. We can focus on these three that's all well and good. So we have these three items, you select the sales order that it's associated with. You could also have items on a po for multiple sales order. So I might be ordering the made in Canada for this particular job. And while I'm placing this order, I can also order some items for another job. I can also order some item for inventory which means that I wouldn't associate it with the job at all, right? So that's effectively how that looks. And then I come over here and I can go ahead and make decisions about my quantity. So I need 10 of these need

12 of these and I need 13 of these. And so my cost is going to be based on, you know, quantity that I purchased and the vendor that I purchased it from. I'll show you a little bit more about vendor specific pricing. Once we get through this portion of the demo. If I was doing this from my mobile app, then I could also include notes, I can include notes from the office as well.

--- Access to information ---

OZELLA

52:34 But if you're technicians, if you typically allow them to do field purchases or if they're calling in orders, the mobile app becomes a really great time saver for them. And for you in the office, they can attach photos. If they're reordering something that was on their truck, but it's broken.

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

OZELLA

52:52 If they're doing a field purchase, they can attach a photo of the receipt and let you know, hey field purchase. And then you can break that down from the office and call out a day and you've got everything documented pretty straight up. So I'm gonna go ahead and submit.

OZELLA

53:11 And issue... when the POS come in from the field. Okay? That's fine. When POS come in from the field from technicians, they will always come in that created status that you saw until it's reviewed by someone in the office. And that way it can be issued once it's issued, then that says, yes, I've put eyes on. It has been approved. It's going through to my vendor et cetera. So once you've issued a purchase order, then the next thing that you'll want to do is receive it before I move to receive. I just wanted to show you what this view looks like and the updates to the approval stamps, right? And that status change. If it was a field purchase, I'd go ahead and receive it in one click because I've already got my receipt and that's done. I'm not waiting on anything. If I needed to make a change, I could issue it, make a change and then reissue it before I receive it. Then there's also a PDF that gets generated. So issuing sends an email to your vendor. If your vendor receives po requests over email, if not, then you can grab the PDF. You can upload it to a portal. There are some fields here that are customizable. You can work on the formatting during onboarding as well or you can call it in. However you typically will submit your po to your vendor today. You would use that same method and we make that easy for you. All right. So now going on to the receiving piece. So on my receiving screen, I can see everything that's been outstanding. I can see the po that it's tied to the item. If it's tied to a job versus if it's not, I can see the vendor and the quantities et cetera. So when I go ahead, select all, and I click this auto fill button and let me enlarge my screen a little bit. Here. There we go. Once I select the auto fill button, what you'll notice is that my values are gonna populate from my quantity to receive in my cost. And that's all going to be pulling from that po at this point. I have an opportunity to make any adjustments that I need to. So I may have issued that po at, I need to receive 10 and there are 200 dollars each. But let's say that it was a partial receipt. I could make that adjustment here, right? Let's say I only received eight and then two more came later. I can also receive at a different cost. So maybe they're not 200 dollars anymore. Now they're two five. Now, before I complete this part of the receiving process, I wanna go back over to the job because I want you to see what that looks like in service trade. Let me give myself a quick refresh here.

OZELLA

56:15 All right. So you can see I have this item here. Now that was not there before the made in Canada at 200 dollars. It's in a status of ordered but not yet received. It's on po 191 for fergusonso. I've updated my received cost and I'm gonna go ahead and receive rows. Now, I have some more decisions to make. I can choose to update that default cost for the item. So I have it in my inventory, default costs to 200 dollars. And now Ferguson is telling me it's two five. I can either update fergusons cost separately or I can say, yeah, let's just make the default cost two five. And that way any time I receive this item or any time I go to create a job or quote with this item, it's going to go ahead and be using the most current cost. So I'm not going to have to worry about my cost being out of sync. In this case, I might not want to update it. I'll just kinda leave it as it is but it'll still reflect on my job. I can also include my invoice number. This is where you're gonna put your vendor invoice number and that is what's gonna help you with the reconciliation later.

--- Parts management (inventory) ---

OZELLA

57:38 If you need to, you know, come back and filter through or view any thing for any reason. This is where you're going to live for that transactional detail. The only thing you're doing over Quickbooks again is if you need to do that weekly monthly, however often you do your journal entry and then making those payments.

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

OZELLA

57:57 So you can always come back if you have to look at anything and, you know, exactly what you're looking for. I'm gonna confirm and close I've received everything. So now my rows are gone. Then the next order of business would be to review my shipment receipts. Now, before I go over to my shipment receipt details, we can hop back over to service trade and we can see that it's now in a status of received and that our cost is updated to two five.

OZELLA

58:31 This is a summary view of my shipment receipts. Again, we have the reference number, which is tied to those vendor invoices. You'll notice these icons and these in a combination of them is gonna live on each of the screens that I'm taking you through. So you have the ability to create filters and you can do multi level filtering.

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

OZELLA

58:53 You can adjust your columns, and then you can export, so I can make decisions about how I want this detail to look. And then I can save those views. So I don't have to recreate it. Again, it's already customized to how I want to be looking at it.

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

OZELLA

59:09 And then I can quickly get to information that I want. I specifically want to see all of my receipts for my motors in the last 60 days. I can do that because I created a filter for it, and it becomes easy for me to come and do that search.

--- Parts management (inventory) ---

OZELLA

59:28 All right. Any questions before I move on to inventory? Okay?

THALES

59:36 Brenda, do you have questions?

OZELLA

59:43 Wonderful. I'll take that as a good sign that it all makes sense. Yeah... wonderful. All right. So we've got our stock summary and this is going to be your high level view of this is the item. This is where I have it. So I've got this item in a few places. From this office view, you can also see the INS and outs that lead you to those summary values. You can also actually take actions here. So you can do adjustments. If there are broken parts, then you can deplete inventory by the part. If there are found parts after you've done an inventory count and look there's this one, you know, screw or whatever that got found behind. It was tucked in a corner somewhere. Then you would need to adjust your inventory. Positive. You can do that. You can do your transfers between warehouses here as well. Your technicians can have the ability to do transfers in the field between their trucks or warehouses if you want to grant them that permission. So if I'm out on a job and I'm down a motor or some part that I need, I can do a stock look up for that particular part. I can see all the places that have that part, right? I can see all my warehouses and who's got this particular item that I need. And if I see it on a truck that I know is near by, then I can call up and I can say, hey Jay, I see that you have a candidate part and I need to get it from you. Are you working on this side of town? Let's swap? And now, rather than having field swapping happening and you're not knowing what's going on in the office, you can see that transfer log. And I will show you that shortly... you'll see some transactions here, full fulfill and receive your fulfill or unfulfilled transactions are going to be between your service trade jobs and your inventory. So you have fulfilled or unfulfilled stock from a job. And then you would have your receive and return transactions between inventory and your vendors. Then you may also have consumed transactions for consumables, you would also see your adjustments or transfers. So I've got a transfer here. And then if I did any adjustments, they would show up as well.

OZELLA

1:02:09 For my transfers, you can see a log of those transfers. So the same scenario I was describing Ozella transferring with a part with control. It happened on the 20 first looks like she gave him a motor. I can see that Tania gave Ozella a motor and...

THALES

1:02:26 On those things that I don't think you need to go into very detail.

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

THALES

1:02:30 I... think Brenda, can you give a Thomas up if you get the idea there? I think we, I think we got the idea on... how you guys can track this, how the guys assign... it. Is it's pretty good... unless you have any other craze functions that usually you don't see around that you want to show us?

--- Parts management (inventory) ---

OZELLA

1:03:00 What functions I'm sorry?

THALES

1:03:01 Any crazy function that you feel like it's especially and we need to see.

OZELLA

1:03:06 Something special. I think the most special thing I will, I'll highlight three things and I will do them quickly. So I'll mention that within the warehouses, you can parent child them, you can drill in and manage those warehouses directly. You can also create a po directly from a warehouse. So in this case, if I want to do a refill po, I can select all. I've got my minimum and maximum set and I can do refill po. So it'll just search through and find any item that is below the minimum threshold to make that a little easier for you. Then kind of floating straight up to your vendors piece. You've got your list of vendors here. And specifically, you can have vendor specific parts. I think that's something that's kind of valuable in terms of knowing that you've got a universal item code which is going to be that same universal code that you were seeing in service trade and gives an easy way for you and your team to all speak the same language.

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

OZELLA

1:04:12 But on that po that gets sent out, it's got the vendor specific item code and same thing. When we're talking about pricing. So we talked about that. There's also some break point pricing that you could put into play. So if you order a part at five or you order 15, it's gonna give you the appropriate price on that.

--- Parts management (inventory) ---

THALES

1:04:33 Okay.

OZELLA

1:04:34 Yep. And then we talked about the transactions. So this is what that looks like. You can see all of those INS and outs here. So this is not living in your accounting system, your sub ledger. This is your deep detail. When you're onboarding, you'll tell us what your different accounts are. And that way we have that put in for you. Yep, go ahead.

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

THALES

1:04:55 When I saw you're telling me that, okay, everything goes, you have some accounts payables. But of course, we're not paying out of this system. What does that mean? That accounts payable accounts set type because you have... yeah that line, for example, what does that mean?

OZELLA

1:05:19 Right. So, if I had a po, I received that shipment and so the shipment receipt becomes a credit to accounts payable.

--- Parts management (inventory) ---

THALES

1:05:33 Okay. But this is not, this is not talking to my accounting system.

OZELLA

1:05:37 No, it's not, but that's part of that setup. So, when you come on, you give us your account information and this is how it's able to be the sub ledger because it'll know your accounts, right? So you can go through this and do your audit and check yourself and see, hey, what are my INS and outs? But you're just not gonna see any payments here. You're not gonna see the bills here because those transactions aren't happening. You?

THALES

1:06:04 Yeah, but if I make a payment, it's no longer liability.

--- Invoicing ---

THALES

1:06:07 So how that goes over? If I have to come in here and inform that I made a payment on that item. Is that right?

OZELLA

1:06:16 No, you're not gonna inform here that you made a payment for the item... you're gonna, yeah, that's gonna stay over in Quickbooks...

DUNCAN

1:06:25 So, this is just gonna always be like an account of, we have spent this much.

--- Parts management (inventory) ---

DUNCAN

1:06:31 Our accounts payable is not going to be accurate at all. It's just going to be a total of what we have paid essential.

OZELLA

1:06:36 That's right? That's right? Then what's going to happen thereafter, right? Once an item gets used. So you're using it on a job, everything that's coming through this module, the goal at the end of the day is that, yeah, I'm gonna use it and then it's going to end up being attributed to a job. And so once it lands on that job and then the job gets invoiced, right? So then that's floating through to your Quickbooks too. So then you will have the Ar, and the ap transactions, debiting and crediting over in your Quickbooks.

THALES

1:07:12 Okay.

OZELLA

1:07:16 So, you'll be able to see the consumption there from that standpoint.

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

THALES

1:07:20 All right.

OZELLA

1:07:21 All right. Well, that's all I've got then for this and I'm happy to turn it back over. If you don't have any further questions for me?

THALES

1:07:29 Brenda, do you have any questions on the purchasing side? No?

OZELLA

1:07:34 Okay. Great. Well, thank you very much.

THALES

1:07:38 Thank you.

THALES

1:07:44 Hope not... no, no, no, it's good. It's just that, you know, I'm not trying to cut you off. It's just some things are kind of basically get there. Okay, you can drop this.

Go to the next thing that we think might make a difference.

OZELLA

1:07:57 Yeah, absolutely.

THALES

1:07:58 That your system not talking to in that part that it's a big problem you guys have. I'm not saying I do breaker for I'm just saying it's it is you're forcing us to double work there because we have to keep up with two seasons like I'm keeping up with my balance sheet, but I'm also look at the sure and I have to be thinking all the time. Okay? Let me look at that one and see how many assets I have, the, how much know, how much I haven't even told whatever it is. So I can be recon, signing my balance sheet at all times... that's just one more thing to worry about. But the functionality is great. Don't take me wrong?

--- Purchase decision ---

JOSEPH

1:08:44 Yeah, that's something that people struggle with is just, hey, what information are we allowed to pass into there restrictions on both sides? Okay? So I also, I built out a proposal for you so you could kinda wrap your head around pricing. Any other questions we need to run through before discussing that in next steps?

--- Pricing ---

THALES

1:09:06 I should be okay then as an or Brenda has anything in there... do we discuss anything price wise or?

JOSEPH

1:09:18 Not really. I gave you a ballpark last time we talked, but I kinda got full on a full on proposal built out for you here. Okay? 40 technician licenses on enterprise 20 project or helper licenses.

--- Parts management (inventory) ---

JOSEPH

1:09:32 And then 40 users of that forms application. And then I also have your partsledger additional warehouses so that you can cover all the inventory if you're gonna track. And I can also take this off if you don't need it. But this is to cover tracking truck inventory for all of those 40 technicians, as well as your warehouses at the offices. So with that, you'd be right at around 150,000 annually.

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

THALES

1:10:03 For the conditional licenses... 20 help. What's that, what the helping is?

JOSEPH

1:10:12 Projects, text technicians that really are doing just project work and they need to be able to clock in, clock out and take pictures, things like that.

THALES

1:10:23 Okay. What is the service forms license?

JOSEPH

1:10:26 That, that forms application that's tied in with service trade, not everybody uses that.

--- Pricing ---

JOSEPH

1:10:32 So that is kind of the separate line item on our proposals. So you would need, if all 40 of your technicians are going to be doing PM checklists and things like that, then they would need to be or they need to have a service forms license.

THALES

1:10:48 Okay. So if I'm doing math right here, the ticket is 189 dollars per tack per year. All right?

JOSEPH

1:11:02 The technician is 189 per tech per month, I believe it is.

THALES

1:11:07 I'm sorry, 189 protect per month. The service forms is another 14 bugs. So you probably about 205 dollars because you need to have one license for the form on to it. You have one service form, a license for every, the initial license.

--- Forms ---

JOSEPH

1:11:33 For every technician that you need to be filling out PM checklist, I do not necessarily need a service forms license to have a technician license. If they're only doing repair work, sometimes they don't need it, but any maintenance technician filling out forms would need one of those.

THALES

1:11:50 Okay. And then you have the inventory.

--- Pricing ---

THALES

1:11:57 Parcel subscription, you have a one time fee, and then you have the, so what's this 35 got... each technician that uses the warehouse has to have a license to, is that right?

JOSEPH

1:12:11 So we can do it a couple of different ways. This partsledger subscription includes 10 warehouses in the base subscription, I ballpark an additional 35 warehouses to cover the 40 technicians, trucks, plus like five other warehouses. So you'd have 45 warehouses that would be trucks and brick and mortar warehouses.

--- Parts management (inventory) ---

THALES

1:12:34 Okay. All right.

JOSEPH

1:12:37 You don't need to track their individual truck inventory. I can get rid of that and they would still have the capability to go and cut POS in partsledger. They just, you would not be able to track refrigerant at the truck level and how much is left and things like that.

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

THALES

1:12:56 Okay. I got you. I understand.

--- Accounting ---

THALES

1:13:05 Account connect. So you need one account connect, but you can have multiple people... what that's just to connect with Quickbooks. Right?

JOSEPH

1:13:16 So the standard connection is free. There are some ways to pass. So this is the scoped integration that Ozella was talking about. Where there are limited ways to bring information about, correct me if I'm wrong here, Ozella that's the ap, some ap information can be passed into Quickbooks. And so that cover that if you want to go that route.

--- Pricing ---

THALES

1:13:45 Okay. Got it. I think, I understand our lines here. Yeah.

JOSEPH

1:13:52 Okay. And so that's the recurring piece. And then your setup would be the second piece down here at 17 six. The only caveat that I have not put in here is the forms. We can build out those forms generally that somewhere between 2010 1,000 or I mean, if you all are wanting to run with it yourselves, we could certainly have that discussion, but I would need to be able to see your forms to see what we're agreeing to build before I can price that piece out.

--- Pricing ends ---

THALES

1:14:20 Okay. Gotcha. All right. I think, I understand. I believe, I understand all the lines here. Are you gonna send that to?

JOSEPH

1:14:40 I certainly will. I'm not just gonna show it to you and then pull it away real quick.

THALES

1:14:44 Well, it sounds good. All right. So shoot that to me. And then again, we're talking here again in the next couple of days with all these options. And then I will get back to you, okay? As quickly as I can.

JOSEPH

1:15:00 Sounds great. And as a reminder, Thursday is my last day in the office. And then I'm gone for a little while. So I'll make sure you have Chris contact information on all the emails I'm gonna send to you. What do you? I know you all need to have some internal discussions, but are you all still on the time line of trying to make a decision in February?

THALES

1:15:21 Yeah, February by early March or go is February.

--- Purchase decision ---

THALES

1:15:26 So we're gonna have... you know, we have all these options, right? So we're gonna have, we're gonna make a decision. Okay? We gonna go this direction and then we're gonna say, okay, we need to start signing contracts, speaking dates, doing stuff like that, right? Whatever we need to do, but we still plan a decision this month. As of today. We don't anticipate delaying that unless something happens that we might need to go. I don't know, get my demos or whatever it is. But for now... we should be good.

JOSEPH

1:16:00 Okay. Cool. Well, something to press. I don't know much about, feel well. FieldBoss. I know a fair amount of people on Simpro, they're pretty decent, but something to honestly press BuildOps on is their onboarding process.

--- Purchase decision ends ---

JOSEPH

1:16:15 I don't like to throw people under the bus, but I've heard some horror stories of people who are a year into onboarding, and haven't gone live. And also heard through the grapevine that they have about a 10,000,000 dollar book of business and four of that is not yet live.

--- Type of work ---

THALES

1:16:30 As BuildOps?

JOSEPH

1:16:32 BuildOps?

THALES

1:16:33 Please throw everyone on the buzz. I'll actually everything... okay?

JOSEPH

1:16:39 Okay.

THALES

1:16:41 So, you only heard about them? What about the other guys? Did you hear?

JOSEPH

1:16:46 Tighten, I thought it was hilarious that you called it frankenstein because they are not built for commercial. They're wonderful at residential contracting.

--- Purchase decision ---

JOSEPH

1:16:55 Simpro. I don't know that much about, from what I understand, it's a little old school, but I know people that are really happy with it. And I don't know anything about FieldBoss. HR is the first time I'd ever seen them.

THALES

1:17:10 FieldBoss. Like I said, it's they are head of all of you guys, don't take me wrong, but the approach is just way different. It's...

--- Accounting integrations ---

JOSEPH

1:17:18 They...

THALES

1:17:19 They, they run out of a Microsoft technology stacks. So everything is you Microsoft products, which means, you know, you have to run a Microsoft account, which is dynamics 365. Also is customizable. It's just crazy, but it's not for everyone either. You know, it's it requires.

--- Accounting integrations ends ---

THALES

1:17:44 I don't think they have the same customer as you are... and we providing that if you do... call it, if you do.

DUNCAN

1:17:58 Sure.

THALES

1:18:00 We are running that intersection between you guys and them. So that was funny. Yeah, we are not like we can go the direction if we want you. It's going to be a lot of effort.

--- Accounting integrations ---

JOSEPH

1:18:13 So, it sounds like they're kinda like field connect used to be where they have the ERP system that you have to use and then piggy back off of that where service trade sits off on its own and then you can connect it with whatever else you want to.

--- Pricing ---

THALES

1:18:28 But, but that lack of connectivity is the down side. It's like I literally see us because when I grow to things serious instead of having a content with six people, seven people, which is what I'm anticipating. I can have three or four. So I'm setting those salaries there, which is a lot of money.

--- Accounting integrations ---

JOSEPH

1:18:50 Do you anticipate staying on Quickbooks desktop as you continue to grow? Because quite honestly, I never see a company of your size still on Quickbooks?

THALES

1:18:59 No, we are, we, at that point where we only pick books because it's comfortable. We know we have crossed that threshold, but it's still totally manageable.

DUNCAN

1:19:10 So, do you guys integrate better with a different Quickbooks system or?

JOSEPH

1:19:16 We integrate much.

CHRIS

1:19:17 I...

JOSEPH

1:19:18 Like NetSuite, Sage, intact, Sage, 300 Sage, 100, we have much more comprehensive integrations there because they have much more avenues for us to connect with.

THALES

1:19:32 Like a net, can you explore the POS and other?

--- Accounting integrations ends ---

JOSEPH

1:19:36 Yeah, that's all communicated. I believe it's live. We have partners that have like that are NetSuite implementers that have built out integrations there that are really.

THALES

1:19:45 We, we have investigated change to that site, but that would be a it's a very large investment for us.

JOSEPH

1:19:55 And that's one of the things that's great about service trade is it can be a good in between step there where you can kind of get things up and running on service trade and use Quickbooks. And then as you're ready a year two, three years down the road, unplug from Quickbooks and plug it into NetSuite. And then we can pipe all the information over into NetSuite?

THALES

1:20:15 I got, okay. That's good to know. All right?

JOSEPH

1:20:22 Any other resources off the top of your head that I can send you? If I think of something I'll send it, but...

THALES

1:20:31 Not from the top of my head right now.

JOSEPH

1:20:34 Cool. So, we typically, what I do at this point is I'll put together what we call a recap page like collaboration platform is what they call it, but I'll send you a link to it. You click on it. You can type in your name and then I'll have the quote and demo recordings and ROI resources and training information and things like that all built out in this web page for you to have all in one spot.

THALES

1:20:58 Sounds great. And I appreciate it. All right. We'll get back in touch with Chris, I guess.

CHRIS

1:21:04 Yep. If...

JOSEPH

1:21:05 It's before Thursday, give me a call. If it's not, I will be on a honeymoon and probably not answering.

THALES

1:21:11 Yeah. Happy adding a.

OZELLA

1:21:13 There we go. Please don't answer Jay.

JOSEPH

1:21:18 Awesome. Well, I appreciate you all the time today. We'll get you all the quote and everything later on this afternoon.

THALES

1:21:23 Thanks. Thanks, gotcha. Because I appreciate it.

OZELLA

1:21:27 Hi, everyone.

The End