



ServiceTrade Review- Jonathan/Juanita Sync

Juanita Guzman with Anderson Mechanical Services
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Participants

SERVICETRADE

Juanita Guzman
Account Manager

ANDERSON MECHANICAL SERVICES

Jonathan Moury
Service Operations Manager

Topics

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Transcript

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--- Call Setup ---

JUANITA

0:01 Hey, Jonathan. How are you?

JONATHAN

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

JUANITA

0:06 I'm getting through the day. Yeah... I actually learned that my sister sent me an article. She goes to UVA. I don't know if you've saw or noticed in the news, but a college girl, I got abducted and then the suspect ended up crashing the car in front of a professors house and it caused enough like noise for somebody to notice and go out and help her.

--- Call Setup ends ---

JUANITA

0:40 But, yeah. So that was a little bit scary to hear. And that just made me think of it because you guys are located in Virginia and it happened at UVA. So I didn't mean to start off a call with some like scary information for you?

JONATHAN

0:57 No, that's fine. I'm actually there every weeks or so.

JUANITA

1:01 Really?

JONATHAN

1:02 Yeah. So, my wife has an ongoing medical procedure that gets done at UVA hospital.

JUANITA

1:11 Yeah.

JONATHAN

1:13 There.

JUANITA

1:16 Right.

JONATHAN

1:17 To keep the bad news rolling and reviewing a lawsuit we listed in, so.

JUANITA

1:25 Or you what?

JONATHAN

1:27 I handle all the insurance fines for us as well. So, reading a 52 page document, but all the things we did wrong here.

JUANITA

1:39 My God. What do you not do?

JONATHAN

1:43 Me...

JUANITA

1:44 So, what do you not do? Because you?

JONATHAN

1:46 Go on. I don't do Dave's job. I don't have all the money at this point.

JUANITA

1:53 What?

JONATHAN

1:54 Everything else?

JUANITA

1:57 Goodness. All right. Well, let's get started. I know we have a few things to talk about primarily sales users, tracking jobs on times number two, your accounting question about quoted jobs and how that goes over to Quickbooks. And then third part. Sure. Anything I'm missing?

JONATHAN

2:23 Something that came up yesterday, I wanted to discuss sub assets and like, I know how you guys intended them, but I had a question on whether you could

enable additional usage... so.

JUANITA

2:43 Okay. Yeah. Let's start with that sub assets. What do you mean by that?

JONATHAN

2:47 Can, is there any way for you guys to enable any asset to be a parent asset? So like right now you have a split system, outdoor unit that can be a parent unit for a split system, indoor unit. But I cannot do the same for our vrf condenser and a VR indoor unit. So what with the asset, you know, reset, Tim asked if there was any way that we could calibrate the assets in our system. So that way it was clearly delineated which units were linked by utilizing the parent asset, sub asset feature in a rte that's incredibly valuable. You know, you've got RF convincing group one C. And then you list the two condensing units as part of that, you know, that are paired on the frame. And then you list all the branch boxes and all the indoor units as part of that group to, and that way you can immediately tell, well this group is struggling, you know, even if all the work being done is on the indoor units. So, but right now, there's no way to associate that because parent assets are limited to... well, parent and child assets are very limited because the intention listed in the service trade training is so that way you can group assets for like maintenance services and stuff like that. We were hoping, to be able to use it for more... service history tracking sort of thing. So... just wondering because I mean that seems like it would be an easy fix just to add the ability for any asset to be a parent asset or any asset to be a child asset. I don't know... because obviously code exists in there.

JUANITA

4:49 So essentially, that would be the fix in your situation, is just for us to add the ability for any asset to be a parent indoor child.

JONATHAN

4:57 And let your customer decide what they're gonna associate. So providing more flexibility to your customers, I figure it's probably a good thing. Now, I don't know what screws up on the back end. So.

JUANITA

5:13 Neither do I, but I will find out.

JONATHAN

5:19 So we're tracking RF systems that sort of information, that sort of information within the system very valuable because right now we're having a reference piping trees that get a set attached to each asset. But if we could just do it within service tree, I'd be awesome.

JUANITA

5:40 Okay, cool. Yeah, I can definitely look into that for you. And as far as like if there's ever any asset types or asset fields that you feel would be, you know, valuable

beneficial across the board, just let us know because in those instances, we can just add them.

JONATHAN

6:02 Yep. That got a list.

JUANITA

6:05 Wonderful.

JONATHAN

6:07 So, yeah, there's a couple that we need to add for controls. We're starting to branch out into doing controls as a separate business. So I've got a list from our.

JUANITA

6:24 Yeah. If you just wanna like, I don't know if you wrote it down, just snap a picture, send it to me over e-mail or just type it out over e-mail that be that'll be good.

JONATHAN

6:32 Yeah, I'll e-mail it. I think there's only two, three... six, there's six. So four, okay. Not extreme. And they're pretty generic. So shouldn't run into any issues.

JUANITA

6:46 Cool. All right. Let's mark that off the list for now. Let's talk invoicing, Quickbooks. Although I think in your last e-mail you mentioned you guys are evaluating an alternative for?

JONATHAN

7:02 Confirm we're moving to Sage intact?

JUANITA

7:05 Okay.

JONATHAN

7:06 Yeah. So that's no longer a concern. Quickbooks is no longer a concern.

JUANITA

7:13 Sage. And who are you going through?

JONATHAN

7:21 I don't know... Tim was talking to Beth, I believe.

JUANITA

JONATHAN

7:31 Don't know all. I got his first name. So she was the one who recommended that we take another look at partsledger since we're moving to Sage intact. So, if that's her, then yes, she was talking to him directly or when involved in that conversation.

JUANITA

7:53 Okay. The only thing I'll mention is just whoever you guys are going through with on this. Sorry, am I cutting out? No. Okay. Just whoever you guys are partnering with for the Sage side of things to just keep service trade, me, us in the loop just so we can work closely together just to really ensure that, you know, things are lining up correctly because I don't know if they mentioned it, but there is a separate piece and cost for the integration between intact and service trade. So I wanna to make sure that they're also talking to you about that because in speaking with a few other customers in the past working with Sage because there's a ton of like resellers and partners, you know, some have mentioned it and others have not. So whenever they come to us service trade and mentioned, you know, we got Sage intact. How do we connect it to service trade. Now, we have to have the conversation of well, that's kind of like a separate piece, the impact in service trade integration and it just kind of throws them for a loop and off guard. So I just wanna make sure that, you know, you guys are aware of that.

JONATHAN

9:09 Okay. And is it just the integration or is it an ongoing fee associated with intact as opposed to Quickbooks?

JUANITA

9:17 Another great question. And that's something that just recently changed. I believe it was towards the end of last year. And again, I don't know if whoever you're working with on the Sage side has mentioned it, but Sage started charging for API calls. Now we hear at service trade, we have done a lot of work to kind of minimize the number of a pi calls that are being generated between intact and service trade within our customer base. So that would be a reoccurring fee. But as far as how much, I have no idea because it varies, that would be a ton of question or perhaps would even be able to answer that. But I will partner with both Tonia, who is our Sage expert here at service trade and also Beth just to provide like full transparency on what you guys can expect and, or look out for. So I'm glad you mentioned that because I've had some instances where customers just get Sage, don't even tell me or us anything about it. And then they come to us and we're like, well, it's kind of like too late, you know, and then we just kinda have to start from ground zero and then it's just like, a big thing. So that's why I just said just keep us in the loop with the Sage stuff.

JONATHAN

10:38 Yeah. I, unfortunately, I'm not in the loop on stage, so I haven't been part of any of the conversations. I don't know what they know, and what they don't know. But so e-mail, to 10 and our CFO mark Sherry this morning and ask them if they're aware of the additional charges. So.

JUANITA

10:55 Okay... cool. All right. So that is not needed Quickbooks. So partsledger... just a few qualifying questions for you. So that way whenever we coordinate the demo, we know like what's important to you, what we need to show you our customers use partsledger, some for po, only some for inventory only, but others use both. Would you guys fall in the category of using it for both? Or maybe just one?

JONATHAN

11:36 I don't know. So again partsledger, kinda got thrown at me hey get a demo of this. Okay? So it, as part of a larger conversation that I get included in till the very last minute. So, I don't know, I know for sure POS, because that's where we've been looking for a way to better integrate POS with service trade, you know, our discussions previously with cojo and all of that. So, but I don't know that we keep enough inventory for that to be worth it for that to be worth the admin headache.

JUANITA

12:18 Okay.

JONATHAN

12:19 Though, but I can bring it up. I meet with them regularly on Thursdays right now to discuss tech integration stuff.

JUANITA

12:30 Okay. I...

JONATHAN

12:31 Don't even know what it looks like. So any kind of sales documentation or something that I could take a look at, it would be great. I went through... the service trades or articles about it... but without being able to play with it, didn't make a lot of sense.

JUANITA

12:53 Yeah, that's just like super high level. Yeah. During the demo, you'll be able to just get like a way better understanding of how it works.

JUANITA

13:06 Okay. But yeah. So we'll just show you both po management and inventory just because it's already going to be there and it's pretty, you know, quick to just show it to you. It's relatively straightforward, really user friendly. So I can get that coordinated while I have you. Well, actually, you might need to talk internally with a few other folks to see what day and time would work. Okay for everyone?

JONATHAN

13:32 I'm not, and I don't think that I'm going to be on it alone. I think it would be me and a couple of other folks on my side as well. So.

JUANITA

13:40 Okay. So in that case, I'll just send you a link for you guys to look through and pick a day in time. Gonna be my colleague, Adam strong.

JONATHAN

13:53 Adam's been pretty popular lately on those webinars.

JUANITA

13:57 Adam, yeah, for sure. How's Northboundary going?

JONATHAN

14:05 It's kinda do... because projects quote don't tie over yet. Tim's hesitant to push Northboundary as a holistic force, all of our sales guys into it because right now only preventative maintenance is transfer over and he's like, well, we, you know, if we're gonna use it be all in. So, so that way there's no confusion on what the process is. So with it, with Northboundary having only having one foot the game, it's hard to utilize it... because then you have two different quoting processes based on what you're quoting and it kinda muddies the water. So that was the biggest feedback. He's like Northboundary looks great. But until it, until all of the quotes that we generate there can go over the service trade. It's it's another piece of software that people have to learn. Yeah.

JUANITA

15:16 Gotcha. Okay. Yeah, I'll make sure I also provide that feedback to the people that need to hear it. Yeah. So that's good to know.

JONATHAN

15:28 I am most excited. Honestly, Northboundary is most exciting feature. Is the survey manager or the asset survey. If that was something that could be imported directly into service trade, we'd probably drop Northboundary altogether.

JUANITA

15:41 Yeah. The one snapping the picture and it's just auto filling.

JONATHAN

15:45 Yeah, that feature is worth, is that feature is probably BuildOps is number one selling point over you guys?

JUANITA

15:55 Really? I don't know they have that.

JONATHAN

15:57 And it's internal for build ups.

JUANITA

16:00 Good to know.

JONATHAN

16:02 So Northboundary capabilities with it is similar to BuildOps. So I would say that's what that's BuildOps strongest feature when it comes to asset management over you guys?

JUANITA

16:19 Okay. Good to know. I will pass that along as well.

JUANITA

16:28 Let's see. So you guys aren't really holding that much inventory? Okay? So primarily just you guys order parts directly for jobs?

JONATHAN

16:44 Yeah. Anything that winds up in inventory is a job that either got cancelled or we ended up doing a more major repair. And the smaller part that we order never got used because we replaced, you know, we ordered a blower motor and instead we ended up replacing the whole blower assembly and it came with a motor with it. So... so we've actually talked about getting those excess inventory guys in here, you know, take a check for 20 bucks and get rid of all.

JUANITA

17:24 Okay. Now, the text, are they ever like issuing any POS or is it all directly through the office?

JONATHAN

17:33 It's all through our purchasing department. So.

JUANITA

17:37 Okay. So text don't hold like a company credit card and they can go to a parts vendor.

JONATHAN

17:43 They do, but if they purchase something without the company card, it'll get back charged against their paycheck.

JUANITA

17:52 If...

JONATHAN

17:52 If they don't pull a company purchase order prior to buying something, then it, then we consider it a personal purchase because it was not approved beforehand. So, okay. So we use teams and we've got a two step process. They ask for the po, they get the po and then they take a picture of the receipt and upload it. So all in teams, we have a big teams chat with the field crew.

JUANITA

18:17 Nice.

JONATHAN

18:19 So, and the procurements responsible for making sure that service traits updated with the po, and then we then we've really enjoyed the ordered and received functionality there.

JUANITA

18:34 Okay.

JUANITA

18:40 Cool. And yeah... and the enhanced functionality after that would be tying in partsledger. So, for example, whenever somebody from the purchasing department issues a po... perhaps they already received the parts, they can update the po and it'll actually update service trade as well. So, you guys have, you know, accurate cost as well as status. So, okay.

JONATHAN

19:12 Yeah. What Tim was saying, partsledger ties into intact as far as POS are concerned. So it might reduce some of our duplicative entry.

JUANITA

19:22 That too. Yep, that'll be, yep. I'll make sure to have Tania on that call as well because she can speak to how, you know, partsledger ties to service trade and then how everything ends up in intact here.

--- Wrap-up ---

JUANITA

19:41 Okay.

JUANITA

19:49 Cool. What else?

JONATHAN

19:52 Any luck on helpers being able to enter comments?

JUANITA

19:55 You know, I asked the team this morning. I'm still waiting for a response, but I have not forgotten. I just asked the team. My colleague said I forgot all about this, but he's also another account manager who I know is also wondering about the changes, but I will find out, yeah, that's also on my list. Also on my list. Ray Henderson was out of office yesterday, but I need to catch up with her on how your meeting went on Friday with the clock and issues that are occurring. So I'll just sync with her and see what next steps are there.

JONATHAN

20:33 Yeah. I wish you had been there.

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

JONATHAN

20:36 My director was on that meeting and he made it clear that getting this fixed is number one priority and it will determine whether our renewal next year is a one year or three or five year whatever.

JUANITA

20:52 Okay. Well, I can definitely listen to the recording. Okay. Thank you for letting me know.

JONATHAN

20:59 Yeah. So we, just as we expand and as we move into longer term projects, we need the stability of clock INS because that's what we payrolls based on. So we can't afford to have mistakes made because there was a software issue especially if a labor blankets file or something like that.

JUANITA

21:22 Right. Absolutely.

JONATHAN

21:25 So, it sounds like they had some leads. I sent them a big long e-mail listing out, location ID'S and job ID'S and employee ID'S so they can try and track, you know, what's going on. It sounds like there might be some caching issues on the person on the devices themselves, but I don't know. So, seems like they were gonna have some items that they were going to be able to Chase down. They kept talking about tying it to issues with asset uploads. To my knowledge. We haven't had any asset issues. Clock in clock out have been a bigger issue.

JUANITA

22:08 Yeah. I've heard clock in clock out and then attachments.

JONATHAN

22:13 Yeah, attachment. Sorry. I said that sense.

JUANITA

22:17 I did.

JUANITA

22:24 Cool.

JUANITA

22:29 So, skip my VP of account management. Just sent me a message about, the syncing issues that you guys are experiencing... and set out to go in the next sprint. Okay, cool. All right. It's gonna get fixed and the next sprint.

--- *Wrap-up* ---

JONATHAN

22:49 Okay.

JUANITA

22:54 Cool.

JONATHAN

22:55 I'm not gonna update, right?

JUANITA

22:57 Yeah. So typically we release sprints every, I think three weeks or maybe two weeks. I'll let you know.

JONATHAN

23:11 Yeah.

JUANITA

23:12 But still, I wanna give that feedback. Was it from Dave or Tim?

JONATHAN

23:19 Dave? Yeah.

JUANITA

23:20 Right.

JONATHAN

23:22 So...

JUANITA

23:25 Okay. Cool. All right. We've covered a lot.

JONATHAN

23:33 When you listen to the recording, it's me saying it, but it's him sending me in messages in the background.

JUANITA

23:41 I love it. Good. Bad cop.

JONATHAN

23:46 Something like that.

JUANITA

23:47 No.

JONATHAN

23:54 A thought. Have you guys seen a lot in a lot of issues with the roll out of the on break feature yesterday?

JUANITA

24:04 I haven't heard anything. What are you guys running into?

JONATHAN

24:10 The only thing that I heard, I told, we told our team not to use it yet because we're still trying to figure out about how we wanna use it because if we set like you can only have this much break time per day.

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

JONATHAN

24:24 And then somebody exceeds it, did we not pay them for that time that previously they would have been paid for? We're still trying to figure out the logistics around pay and how we're gonna use it. So, but I played around with it yesterday and it, yeah, I had to, when I hit clock out or attempted to log in to break, I had to refresh the app for it to show, what clock event was I was in correctly. So, like if I was on site, I would clock out to go to break and then it would show me still as clocked in on site until I refresh the app, and then it would say on break for X amount of time.

JUANITA

25:03 Okay.

JONATHAN

25:05 I don't know it might have been just me but I only played with her for like five minutes just to grab some screenshots so I could send the TAM.

JUANITA

25:16 Okay. Interesting. I'll test it out here right after our call on. Great.

JONATHAN

25:26 Yeah. We, we need to determine based on our handbook, like our handbook determines how many minutes worth of great time paid and unpaid and Temple gets on a single day on a daily basis. So, but we haven't been enforcing that at all because we haven't had any way to track it now that we do, or like, well, do we push it now? Do we wait till 2024? How do we want to proceed with caution? So we don't lose folks.

JUANITA

25:54 Yeah. All right. So, I owe you... a follow up on parent child assets... a partsledger demo. Just follow up on the clock clocking issues.

JUANITA

26:28 And Northboundary feedback.

--- *Wrap-up* ---

JUANITA

26:41 I miss anything.

JONATHAN

26:44 I don't think so. I'll e-mail you the other assets that we would like added for controls. So.

JUANITA

26:51 E-mail, me. I wanted. Okay, cool. All right. If you think of anything else, just shoot me an e-mail but yeah, all right. Awesome. Yeah, just be on the lookout what I'll send first and coordinate is the parts of your demo. So I'll send you some times to choose from, and then I'll follow up with the remaining three action items.

JONATHAN

27:16 Okay. Sounds good.

JUANITA

27:17 All right. Awesome. Thanks, Jonathan. I'll check it back to it.

JONATHAN

27:20 All right. Appreciate your time.

JUANITA

27:22 Bye.

The End