ServiceTrade & Armock Mechanical

Daniel Geary with Armock Mechanical Contrs Inc
Recorded on 7/11/23 via Zoom, 1 hour 19 min.

Participants

ServiceTrade

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Michael Menolascino
Field Manager

Armock Mechanical Contrs Inc

Stephanie Sullivan
Administrative Assistant

Other

Topics

Transcript

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

STEPHANIE

0:00 Hello?

DANIEL

0:01 Hey, good morning, Stephanie. How are you?

STEPHANIE

0:03 Good. How are you? Doing? Well. Good. Got Ryan and Mike in here right now.

STEPHANIE

0:07 Christi, no way.

DANIEL

0:10 Hey, good morning, everybody.

STEPHANIE

0:12 Good morning. How are you? Well, it's still day.

DANIEL

0:16 Tuesday, I know getting back to the first full week.

STEPHANIE

0:22 No, I'm going camping.

DANIEL

0:26 Go.

STEPHANIE

0:29 I got a new campus. Well, a new old number.

DANIEL

0:32 My wife would be jealous. She did that growing up as a kid, me not so much, so that's been something we discussed and I said maybe in our retirement or if we hit a big somewhere well, good for you. Where are you going to?

STEPHANIE

0:45 I'm just going to me. It's a family Reunion. We do. We've done for like 35 years. So, my 1994 trailer.

DANIEL

1:02 Well, those are usually those adventures are usually the best memories, right?

STEPHANIE

1:05 I can't wait.

DANIEL

1:10 Well, while we're waiting for the rest of everybody, you know, maybe I'll jump ahead a step if that's okay with you, and just confirm that, you know, you guys have been evaluating software for a couple of months that can be a little bit cumbersome, and become almost a burden at some point. But has your guys decision criteria changed at all? Or are you guys still on the same path from when we started originally looking at software and what expectations you have for functionality and workflow?

STEPHANIE

1:41 In terms of pipeline, I would say.

DANIEL

1:43 Just in term?

STEPHANIE

1:44 Overall.

DANIEL

1:45 Of, you know, the way the software works, right?

--- Parts management (inventory) ---

DANIEL

1:48 What was important for you guys is the reporting, right? Making sure that everybody has accurate real time data, whether it's sales metrics, customer data, technician, data entry, information, stuff like that... the data, and time tracking, right? And then the parts management. So, being able to really see at a very high level, all of your parts, the allocation of the parts value of inventory updates of that criteria.

--- Purchase decision ---

DANIEL

2:18 Is that still all very important and definitive in your decision process? Yes. Okay. So, as you guys are valuing the two different platforms, you know, what? I guess areas you feel service trade is doing well at? Do you have any concerns of things that we need to maybe recap or even just recover as we're looking through this?

STEPHANIE

2:42 Not really. I wanted to see Danny. This is Mike talking. I just want to see, the workflow review from start to finish because I wasn't involved with it. You know, Ryan and Stephanie kinda narrowed down to our choice to sort of trade one other and I just want to see it and I want to understand a little bit more so we can look at it and say what is our back of the office or what is our internal workflow is gonna look like in terms of who's gonna manage what start wrapping ourselves around that too?

--- Purchase decision ends ---

STEPHANIE

3:09 Because, it affects positions and affects what people do internal and everything. So, who's gonna be responsible for? What is also helping us? What's helping us drive the decision on which software, you know, quite frankly.

DANIEL

3:25 Definitely. Okay.

STEPHANIE

3:26 Any, I know the other one of the things we talked about on the phone the other day was the reporting since we're all timing material and with the ones that we saw that were quoted, how we get the reports for those.

DANIEL

3:42 Sure.

STEPHANIE

3:45 Well, the biggest thing for me, Danny is, when we decide, I don't want some, you know, I've seen, your reports that you can do that, right? Right right into your software. You can create ones. I want, I don't want someone to come back and say, well, we can build this for you. We can mile this one. We can, I, that I wanna know what we're getting out of the box, you know, I'm fearful that someone's gonna say, well, we can do this and then we go to launch and we start getting more involved. Well, I'm sorry, we can't do this now, but we can do this later. I want really make sure that doesn't happen.

--- Implementation and ongoing support ---

DANIEL

4:18 Understood. And, and that's why I did bring in Adam to our last meeting because quick site reporting and in the partsledger that's really Adam's he heads both those departments, has a team underneath him. So, what he did with the quick site reporting is he showed you the adoption of reports that you'll have those four analytical reports.

--- Implementation and ongoing support ends ---

DANIEL

4:36 Those are the custom package starters that everybody uses, right? And that's going to be the case for the next year because as you're using the software, don't forget you're starting to enter in that data so that information is not really viable for probably six, maybe four to six moving forward.

--- ST app contracts and pricing ---

DANIEL

4:53 There may be different reports that you want specific to your workflow that's when it comes into play. Can we do it on our own as our mock individuals or what do we need service trade? It's about a 50 50 split. Most people understand how to create the filter for the three line items they want.

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

DANIEL

5:08 And now you can create any type of report that you want or you rely on my team. But again, just to preface in the beginning, you're going to have those four candid reports that have all those different benchmarks inside of each of those reports that are gonna come out of the box for you guys. And that's where we found those are the reports that people have asked for over the last like 18 months to two years. So that's why we catalog them into the four dashboards for you to have right? Upfront.

STEPHANIE

5:34 And I figured as much I figured that's kinda what the other contractors using this platform that's kinda what draw the decision has the box reports?

DANIEL

5:43 Yep. And it's not data that we think it's important. It's literally been discussed with for like I said, like an 18 month period of like what is the crucial data across our customer base? So I'm not gonna get too much into that just because it'd be redundant, and it is what it is, those are the reports when we do the time material stuff. You'll be able to see that in the office that will be pretty clear and evident on all the jobs and quotes that you're creating and managing. You'll have the options for time material however you're tracking, your cost.

STEPHANIE

6:12 So those built in reports work with the time and material right from the start as well.

DANIEL

6:18 Correct, right? Because it's a line item inside of a job and service trade which is going to be pulled out of that data metric that's correct? Okay.

STEPHANIE

6:29 Chris is gonna be late.

STEPHANIE

6:30 Yeah, you can just jump in, Danny?

DANIEL

6:32 Okay. So, you know, what I did was again and we'll just jump into this as you guys discussed, it won't cover everything. But I've created an environment today as it relates to the dispatching of the jobs, the technician entry points, the customer recap and signature. And then if you guys like, we can go back in the office just to recap what the admin would see as far as reviewing it, putting it into an invoice step, we can cover that as well. One question I have around dispatching your jobs when you guys are looking at it a week on review, what percent of jobs are calls from your customers versus plan jobs that you've already got scheduled out that you need to now put on a calendar?

STEPHANIE

7:12 70 30, 70 calls from customers, 30 plans? Okay?

DANIEL

7:20 So, I'll show, you know, the side of the dispatch and how easy it is to be able to generate that call, have that visual and then execute that out to your technician. We start there.

STEPHANIE

7:31 And Danny, as you're going through this, can you also point out like how we can see the history right from the start just to make sure there's not like a duplicate call being put on the more or?

DANIEL

7:45 Sure.

STEPHANIE

7:47 Yeah. Okay.

DANIEL

7:48 Yeah, no worries. So what we're looking at is a dispatch board. So you're gonna have, your technicians broken up into either different offices, different divisions. However you segment them now, you'll be able to get that set up that way in service trade... up top would be your available jobs board. This is... an exact indicator of how you would not duplicate a job, right? You'll see the workflow in a minute, but this is the end result. You're going to have a customized report that you guys have depending on job types, availability, proximity service line, you name it the thresholds there. And then you'll create a customized report. So that way you can easily take a work order, drag it onto a technicians calendar and get it set up for them to complete out in the field. So again, this is going to be your quick visual to see what's going on throughout the day. And we'll go ahead and toggle that over so we can go ahead and forecast or schedule a service call for tomorrow if needed. Now, let's just say a customer calls in and we need to take that inbound call... based hardware. We service them. They've got multiple locations. They tell me it's their NC branch.

--- Assets ---

DANIEL

8:57 So while their contact and customer detail information pop up on the left hand side and then back to the right, we can do the emergency service call that came in today. Customer said they had no heat... that's tied to their top equipment. And we're going to go ahead and tell the technician to troubleshoot and repair.

--- Assets ends ---

DANIEL

9:18 Now. I can save this to go back into my catalog of jobs or I can assign this out to a tech right away. I know that Danny is available. I'm gonna go ahead and put this on his calendar right now. So I'm just gonna put it on for one o'clock save it. So that's how easy it is to catalog that call. Now, if I did not go ahead and assign that to myself, that would then drop into your unassigned bucket. So calls that are coming in throughout the day are going to be the ones that you see right on top here. And again, I can drag that job onto a technician work order. And then now that job is ready for me to execute out in the field.

STEPHANIE

9:59 Can I ask you a quick question on that? When you're cataloging or taking that dispatch from the customer and you're loading as hardware or the branch?

--- Assets ---

STEPHANIE

10:08 Can you go back to that screen again or is that... right there? Okay. Now we're loading it all that information from, right, right? There, is there a way to say what's the previous history of that customer before we load that onto our unassigned board from right there, how do we navigate to say, okay, what is the history for that particular customer? Is there a way to do that?

--- Tech On-site ---

DANIEL

10:32 Now, from this board here, what I would do is I would come back to my search bar and type in, I have to go to my customer on their page here. So once I create the job, I may go ahead and log that call, not create a work order, but I'll just look at the customer detail information from the job itself.

--- Assets ---

STEPHANIE

10:48 It's right there, right? So we could create the call, but then we can navigate right to that to see if that's a recall or not a recall on that particular piece of equipment.

DANIEL

10:58 Correct, right? Every location is tied from a corporate, to a specific site that you guys manage. And when I click on the site of that location, that gives me a list of all the jobs that have happened in the past, whether they've completed scheduled or invoiced. And then down below, under deficiencies, this is where you're gonna see any repairs that were made or documented in the past.

--- Tech On-site ---

DANIEL

11:22 So now I can actually say, hey, it looks like we are out here and document is back on July sixth. So I'll see a full record of details for that customer. And then once I do that, I may come up here and say, you know, what great I'm gonna go ahead if that was still on the board here. I'm gonna create that, turn that into a job and go ahead and assign that to a technician.

--- Tech On-site ends ---

STEPHANIE

11:43 So if let's say we do find out at this point that it is a recall?

DANIEL

11:49 Sure.

STEPHANIE

11:49 Is there a way to go to the original call even if it's invoiced out already and create an additional one that links right to that?

STEPHANIE

12:01 Absolutely.

DANIEL

12:02 You could, so explain a little bit of the purpose. So what I'm gonna do is I'm gonna go to this job here, right? And let's just say for your purposes, you've completed the job, but now you've realized it was a recall and maybe it wasn't can you just describe that? So I can point?

STEPHANIE

12:15 Exactly. So what's happening for us right now is we're combining different service calls. Okay? And it's not an easy process. So we'd like to avoid that and just be able to add on to, you know, the service call that already went out even if it's been invoiced out to the customer.

DANIEL

12:43 Sure. Yeah. So it sounds like the typical use case here is when service trade, you can have multiple services or multiple appointments on a single job. So that way the end of the day you're going to have one record of truth as far as documentation as you guys are making changes to the work order, right? Maybe somebody open this up and change it from a service call to a recall or warranty job. And you need to go ahead and back track that information.

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

DANIEL

13:08 You're going to have an audit trail to see everybody that has ever interacted with this job again, whether it's a five day job, a two day job, a job that's been reopened and changed, you'd be able to create those statuses all in the same document. So that way you only have one document to go back and refer to.

--- Pricing ---

DANIEL

13:29 So pretty simple to do here.

STEPHANIE

13:34 Could we reopen it and then it back?

STEPHANIE

13:38 What if that was completed by the technician, Danny, and then also hardware in 72 77 says we want to build that to a different address than the 2,200... pensington court?

DANIEL

13:59 Yeah.

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

DANIEL

13:59 No worries. I mean you can always reopen jobs, right? And if I had to make some edits to some documentation here, no problem. Let me just put labor in here. So that way we'll have some measurable... it's good. So again, I can now reopen this job, create the invoice.

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

DANIEL

14:21 It may have to go to a different customer. So I can choose the contract that is going to get sent to... I can manipulate the line items if needed. And then the, again, you guys may review this and say, hey, this needs to go to a different customer or different invoice or a different. This needs to go to the parent company, not the site location that would all be done under your terms of condition invoice name to be able to change that and send it to the right office.

STEPHANIE

14:48 That's a one time thing. It won't change every other future work order.

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

DANIEL

14:54 That will only change for this one instance.

STEPHANIE

14:56 Okay. And...

DANIEL

14:59 Back to the default Bill too from there.

STEPHANIE

15:01 Okay.

STEPHANIE

15:02 And since you brought up that review screen, there's a place that we can put notes that's you know, like that. I can ask Mike. Okay. Is this a, is this a quota job or is this timing material? I'm just using an example under reviews. He'll see that.

DANIEL

15:21 We put draft here and put it into a draft mode. And then you're going to have some comments here. Why is in a... like what is this?

DANIEL

15:44 I've been in the field a couple of times.

STEPHANIE

15:47 I can.

DANIEL

15:48 Yeah, pretty simple to do. And now, Mike, Scott, you know, I'll have an alert that says, hey, there's something to draft that Stephanie has a question?

STEPHANIE

15:56 Okay.

STEPHANIE

15:57 So, we got all the tech technicians see those comments?

DANIEL

16:01 It's up to you guys. You guys have permission settings that you set different thresholds on level of visibility?

STEPHANIE

16:07 Okay. Perfect. I think those were the answer those questions very well, to navigate. So, so now at once history, we've got an unassigned dispatch. We can change the billing. We can change the we're gonna catch it a previous invoice. Now, we're now we're unassigned. Now, you're in what I'm sorry, I call is we've dispatched that to you, right? Yep. You're in the field?

STEPHANIE

16:36 Can, can I ask one quick? So, Danny, we're, I see where the unassigned is, but let's say we've got 50 unassigned.

DANIEL

16:46 Yeah.

STEPHANIE

16:47 How are you gonna see that?

DANIEL

16:49 That's gonna be that's gonna be under your job type. So once it goes.

STEPHANIE

16:55 To...

DANIEL

16:56 A specific job type, it's gonna go from unassigned to maybe a service call, priority service call. So they drop into this bucket up here. That way you have everything set up.

--- Recurring maintenance ---

STEPHANIE

17:10 Close.

DANIEL

17:11 Out one further to like if I go all the way down the due date, the range.

STEPHANIE

17:15 I...

STEPHANIE

17:15 Mean...

DANIEL

17:17 What's that... I was going to switch the technician app when you?

STEPHANIE

17:23 No, there we go there's, no.

DANIEL

17:25 Gonna show up here, right? And you're going to have all different filters that you guys set up by due date.

--- *Recurring maintenance ends* ---

DANIEL

17:29 So the calls that are coming in today, maybe something that happened last week that never got your dispatched. They all show up in those days by category. Okay. So you'll have it lined up for you to make sure it never goes unseen.

STEPHANIE

17:43 That's all that could be Daniel. I'm gonna have some questions for that, those job types that you have hvac compressor overdue today. We can create as many of those job tips as we want or is it limited to?

STEPHANIE

18:00 What's the?

DANIEL

18:02 It to the software? But I can almost with confidence guarantee that 95 if not more percent of your... suggested names are going to be here.

STEPHANIE

18:13 Yeah. Okay. Load it in there.

DANIEL

18:16 Yeah. As you can see, I've got every single what we would say service line turned on. And within the body of that service line, you're going to even drill down even further. So again, I can almost guarantee that it's here, right?

STEPHANIE

18:28 Yeah. You can just... click on which ones you want there, and then you're...

DANIEL

18:35 Exactly. Yeah. You're not going to have every single service line that we offer to customers only specific to your account. So you're not bogged down with everything.

STEPHANIE

18:43 So, one of our big ones is pause calls that we have to go back to that. This is something, this is where you see those.

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

DANIEL

18:54 Yep. You'll either see them in this report here or you may have specific reasons on why the job is paused and you can categorize that even further. So, maybe we have all these jobs that need to have parts ordered or we need to go back and we've received them but never dispatch out the call.

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

DANIEL

19:12 So that's where all those specific job types, if you don't want them bundled into the category that you're seeing there can be either minimized based on all these different job descriptions for incomplete services.

STEPHANIE

19:22 You see that based on technician to?

DANIEL

19:25 Yep. The tech will see it right here. You can categorize that by the, to the technician. So you can get as granular or non granular as you want. And you'll get all that different data sets right back to you.

STEPHANIE

19:36 But also any of those paused calls or completed calls are going to remain on the technicians board, correct? Or from the mobile app, they'll be able to see those at any point in time.

DANIEL

19:51 Yeah, they're going to have access to all those jobs and I'll show them to you momentarily?

STEPHANIE

19:55 Perfect.

DANIEL

19:57 And my question to you is, you know, do you want them to have access to past, jobs that they maybe have a completed need to revisit?

STEPHANIE

20:06 If they're billed out, no, but.

DANIEL

20:08 Okay. Cool. Yeah.

STEPHANIE

20:11 Up.

STEPHANIE

20:13 Until the point that they're 100 percent invoice?

DANIEL

20:16 Yeah. Okay. Cool. Yeah. I mean really the reporting, is untapped, right? And so you can have it out of, the bird's eye view or get as granular as say show me all, Danny's open jobs that we need to order parts for, have him go back next week since he was out last week, whatever, you know.

--- Recurring maintenance ---

STEPHANIE

20:31 And so this is something that you can pull up... even having them specified to like parts on order or, you know, to the technician, you can also do a report that pulls up every single case file we have.

DANIEL

20:48 Exactly. Yeah. I just leave my technician field blank and show me everything. I wanna see everything from a certain date range to category or just show me all everything.

--- Access to information ---

DANIEL

21:04 So I think great questions. So as it relates to the scheduling side, I think we did, a pretty decent job getting those questions answered. If I move out into the field... gonna show you the workflow from the technician standpoint. So this is where your technicians are going to be living out in the field as they're documenting their day through out service trade.

--- Access to information ends ---

DANIEL

21:29 As you can see here, I can see all the jobs that I have scheduled for me today. If I untoggle that, I can see all my past jobs that maybe I need to go back and revisit. Like here, we have Monday, the 20 seventh that install is still not complete. So again, I'll have my visuals, all of all my uncompleted jobs. But today, I'm just worried about the jobs that have been dispatched. So I've got a service call on a PM. So if I open up that service call, this is where I'm gonna start documenting everything that's happened.

--- Tech On-site ---

DANIEL

22:00 Now, a couple of different things can happen internally as far as your guys best practices one, maybe for every service call, I have technician notify all my customers, let them know that they're in route.

DANIEL

22:16 And then once I'm on site, I'm gonna start clocking in for that time.

--- Deficiencies ---

DANIEL

22:21 So I can see is hardware for a service call. I open my window and I see what the technician or what the office typed in looks like. We need to go ahead and repair that hvac unit. Cool. Well as a tech, I wanna see, hey, has anybody been out here?

--- Assets ---

DANIEL

22:36 It's all the way at the top of the roof and I wanna know if I need parts beforehand. So I go into that unit and I go see, hey, quick service history. Has anybody been out here recently and made any adjustments or modifications of the equipment? I can see Danny was out here on the sixth of June.

--- Deficiencies ---

DANIEL

22:51 If I open that up, I can see. So there's a bad compressor. I can see those bad parts that he recommended for replacing. I can even listen to the audio memo that he left in the recap of what they're looking at, what he's recommending for repair. So again, long before I even get up to that rooftop unit, I can see a full history list of everything that's happened in the past. So I can best troubleshoot and bring up what parts are needed. So that's pretty simple. So now I make my way up to the roof, I go ahead and I find that I've got some issues. So I'll go ahead and take a picture. Let's just say I found a bad competitor. It's all burnt out. And luckily I brought one up with me. So I'm gonna go ahead and show that part here's. The new ambassador... and I can even add a note if I want to for the office instead of writing everything out. Just let Stephanie know, hey, I just came out here. Quick fix change. The ambassador units been up and running for 30 minutes heading out on the next job... done.

--- Tech time tracking ---

STEPHANIE

23:50 And that's really cool. I love that per.

DANIEL

23:53 So again, let your technicians categorize everything pretty easily. They can put notes in there. I skip that step, but it's a talk to text feature very easy for them to do. Okay. So now it's on the job items, timing material that were used on this job, simply go on time items, excuse me, job items and I enter in my time and material.

--- Parts management (inventory) ---

DANIEL

24:12 So if I'm looking for what parts I have, where I use, let's just say I used a widget for today... and I was here for an hour.

STEPHANIE

24:29 And then this is how...

DANIEL

24:30 Easy it is for me to go ahead. I'm sorry, go out, say again?

STEPHANIE

24:32 This is where the partsledger is being pulled into this that they're correct?

DANIEL

24:41 So now, I'm just letting you know what parts that I've used, and we're good to go. So now that those parts in time are on my job, your inventory has now been updated automatically, right? It's letting you know who used that part, where that part was used and where it was pulled from.

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

DANIEL

24:57 So there's no additional step for your technicians to be doing. The only thing that you have now is a software in the background or accounting platform. The background that's now giving you a high level overview of your reporting your parts so on and so forth. So that's it.

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

DANIEL

25:10 I'm done. I move on to the job. I close out. We're good to go. Now, I do wanna stop here just to see... if a parts needed in a po needs to be cut. What does that process look like for your technicians? Now? Let's say, I'm on site, I need to go, to the supply house because this place is two hours away and it's not worth making a return trip. I need to go to the supplier and get parts. What does that look like for you guys now? And...

STEPHANIE

25:39 I had to open.

STEPHANIE

25:41 The po that they use is the original work that was given to, from the dispatch. Okay? You don't issue a separate purchase order. They kind of have the time to use that initial work or a number to buy everything they need. So they leave to go to the supplier. Pick up a part and go back okay?

STEPHANIE

26:01 And just to take that even a little further, what we like about, that sounds like it might change if we go to the system, is that number flows through the whole process? So it is the work order number, is the po number? If the technician needs to go to four supply houses on the way to that service call, that same number flows through all the way. So county can tag it correctly, and it will end up being invoiced correctly. And that's our process.

DANIEL

26:30 Okay. Now, with that being stated, do you wanna, do you wanna keep that process? Do you wanna change that process and get away from having a specifically generated po number generated for this job?

STEPHANIE

26:44 Is that an option?

DANIEL

26:45 Yes, it's an option?

STEPHANIE

26:47 I think we got, I think that's a, great question to ask. I think that the four of us will talk about that because if that's an option, I think that's worthy discussion.

STEPHANIE

26:58 How is that different than the, what you told us before, Danny, about how it generates a new number through the partsledger every time, but it's in the body for order with where it goes to. So we can tie it together. How are the two things different in your system?

STEPHANIE

27:16 Sure.

DANIEL

27:17 That is a great question. So natively in service trade, what I would do is if I did not have partsledger tied to my software, I would go ahead and enter in that part just as I did now. And then there's a tab underneath that job item that gives me the opportunity to go ahead and choose the vendor that I went to attach the job number into the po field and then give you a status update received, not received, needs to be ordered that's, it comes back to the job as you as it lands here with partsledger.

--- Parts management (inventory) ---

DANIEL

27:49 It kinda cuts out a lot of the processes for people that are trying to keep an accurate headcount of parts for costing and paying the invoice and the vendor and knowing inventory and true cost that's for partsledger comes in. But for the tech, it's pretty simple. If I need to go to supply house, I go ahead and I say open up my ledger.

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

DANIEL

28:08 I'm already tied into the job. So I'm gonna say great. I need to create a PL for this piece that I need. So I'm at my supply.

DANIEL

28:18 Create the po.

DANIEL

28:23 One off part. I, my hvac... I'm at the put the wrong thing. Hvac cost me 10 bucks. I'm at the counter. Now, I got one of those add that item.

DANIEL

28:44 Need part to complete job... finalize. Po. So now what happens is service trade is now going to go ahead and create a journal entry for you guys to be able to track back in the office. But more importantly, it's now given the technician the po number six four four which is tied to the job, which is now back on the service trade job for both the technician, Adam and to see on those work orders.

--- Deficiencies ---

DANIEL

29:13 And now for your technicians, they're waiting for the part, I go ahead and get my, they can stop here and be done. I'm done, but they have the option to go ahead and if you wanted them to take a picture of that receipt, I remember, I think Stephanie asked me that yes or no, they can do it if you guys wanna see it completely up to you. But it's pretty simple. Let me just go ahead and take a photo.

--- Parts management (inventory) ---

STEPHANIE

29:37 If I'm wrong, even if something's in are inventory currently, you still have to put in the cost of the part, correct?

STEPHANIE

29:49 Even if something is in our inventory currently, the...

STEPHANIE

29:54 Don't have to put the cost with.

STEPHANIE

29:55 No. So we right now have a whole, I mean all our parts are in, if they go and actually get from the supply house.

STEPHANIE

30:04 I...

STEPHANIE

30:05 Just use that because it's easier than looking through inventory for it. But if it's something that they have to pull from their truck stock, it's all in there with in there because Jen put it in there when she received it, from the suppliers preloaded or off the other, what they've taken. The otherwise, you put in correct pricing and then it's updated all the time.

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

DANIEL

30:34 And it sounds like it's a similar workflow. If you guys remember last week, right? Sometimes the technician just puts a Penny placeholder in there. But as soon as the technician requests the po, the office gets notified of that, and then any changes. So if the office is putting in the actual cost, partsledger is gonna know that we'll let you know hey the price that you've entered is either below or above what your total average costs are. But the point is that you're entering that somewhere. So now you're entering that in partsledger and it updates service rate everywhere else.

STEPHANIE

31:03 All of...

DANIEL

31:05 The back end reporting and everything tied to it with that single entry.

STEPHANIE

31:10 Is there any lag or any notification any time someone generates a po for a part on the back end?

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

DANIEL

31:19 Yeah, that's all tied to notifications. You guys have a notification center based on who has what responsibility and role inside a service trade. And then those people or that person would get a notification of anything that's been flagged for their attention?

STEPHANIE

31:36 Yeah. This is Christie. I had a quick question for you.

--- Parts management (inventory) ---

STEPHANIE

31:40 I don't know if this makes sense or not. I'm trying to complicate things too much if our technicians are in the field and they're going to supply houses and we want them to kind of use our current process where the same job, the same po just flows through the system like we just talked about. Could we use partsledger for keeping track of inventory? That would be, for instance, maybe things are not purchasing for a certain po, but it's truck stock. It's warehouse stock. Could we use partsledger for those type of inventory management? But the one off parts that they go to a supplier to buy for that job, use, the po of the job, would that work to mix and match a little that way?

DANIEL

32:26 If you guys would prefer to do it that way for sure... you guys have your options there as relates to, you know, the full on usage of a partsledger and what I mean by that is some of my customers don't even have their technicians cutting POS out in the field, having this part of po in their workflow. They're only doing the later part of what you just discussed as far as an inventory control and one off parts and things of that nature. So, yeah, you, you've got that versatility there for sure.

STEPHANIE

32:55 Okay. And where do, where does the tech see that work order number on here?

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

DANIEL

33:04 Right up top here. It's the job number.

STEPHANIE

33:06 I'm sorry, my, is away... the job.

STEPHANIE

33:16 A purchase order then everything will follow. That will ultimately be the invoice number two, correct?

DANIEL

33:25 There will be a separate invoice number you'll see in a moment, but the job number gets linked, the invoice number gets linked to the job and service rate.

--- Parts management (inventory) ---

STEPHANIE

33:33 How we have it today?

STEPHANIE

33:35 Number job is the same thing. Yeah, that's perfect.

STEPHANIE

33:42 It is good to know that they can use that number. I know that was my biggest, it's the same process then. Yeah.

DANIEL

33:49 It's how we started to do inventory or po management early on. And as parts evolved and people track them at a higher level that's when the parts management side of service trade with the additional creation of that po for the ledger.

STEPHANIE

34:06 Sorry.

DANIEL

34:08 Okay.

STEPHANIE

34:11 And just to clarify one more time and make sure I'm understanding this correctly. So with the partsledger, if we're only using that for truck stock so that we have inventory of what's on their truck and they're in, they pull apart like you just showed us that out of partsledger and out of their truck, correct? Okay?

DANIEL

34:37 Gonna have a source and a reference tied to the used on part with the date time stamp, then automatically update partsledger.

STEPHANIE

34:48 Is keyword this?

STEPHANIE

34:50 So, so Danny, just to, I think you already answered this and I think the answer is yes, but I just want to clarify if we use partsledger in that way where we were keeping track of truck stock for individual trucks and warehouse shop, we could set up basically all different warehouses. Some of them are called trucks and some of them are called main warehouse, but we can set it up that way so they can pull from their own truck.

DANIEL

35:15 Absolutely. Yep. Okay.

STEPHANIE

35:18 Okay, great. Thank you.

DANIEL

35:23 Let's see. Just looking at my notes here for the mobile app, I think the last thing we wanted to cover here was just the customer interaction standpoint.

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

DANIEL

35:34 So again, if I've completed all my services, taken all my pictures and photos out of time material. Now, I'll go look for my customer to kinda tell them the story of what happened and get their signature and take off. So I hit view more details... at, on items.

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

DANIEL

35:53 I want to go ahead and create a work acknowledgement. So now I can go ahead and review this with my customer. Simply hit review. I go find them. They can see everything that I've done. You guys pick and choose what you want your customer to see and not see it's completely up to you all. But essentially, I'm telling them the story of everything that happened. They confirm, enter in their information. It's not there, sign a copy and then they'll get a copy of that work acknowledgement and then another copy will post the job itself.

STEPHANIE

36:23 Like that?

STEPHANIE

36:25 Question is got a main email just for that, can?

--- Access to information ---

STEPHANIE

36:29 Yeah, I like that.

STEPHANIE

36:31 Or TAM.

STEPHANIE

36:33 Tablets...

DANIEL

36:34 That either or phone or tablet either? Or?

STEPHANIE

36:37 Right now, they use ipads, but it could be, since we're back on this page you guys have. So can you show us how they update equipment or add equipment if it's not in?

DANIEL

36:52 Sure.

--- Assets ---

DANIEL

36:54 So under the assets window, this is where I can update and modify any information on this unit. So if I click on that rooftop unit, hit edit, maybe I realize that this does not do the main lobby. This is the kitchen, right? I can make any of those changes here. That will update the office. The second piece is maybe this is a new customer. They want us doing both rooftop units. So down below, I can add an asset... and go ahead and fill that out. So again, we've got a rooftop unit... and now I would just put in all the information, make model serial number, enter all that detailed information in save it. And now that will also update the office as well.

STEPHANIE

37:36 Okay. And this is all live time. So when the technicians are updating things in the field with assets, the customer record automatically, right?

DANIEL

37:45 Yeah. About probably about 15 30 second lag, but yes, real time.

STEPHANIE

37:49 Okay. And what about they get to a location and we've taken all the old units off the roof and put all new ones on. How do they, how do they go? Not delete, you know, because we want the history on it, but just make it inactive. Can you just show us what that looks like?

DANIEL

38:06 That can only be from my understanding, that can only be done from the office. I do not believe a technician can deactivate a piece of equipment. They would just have to mark that service saying or let the office know in a comment that this equipment is down or replaced it office. You would inactivate it so that we have all the history, but it's not coming up on your asset list unless.

STEPHANIE

38:30 Thank you technician. Okay. And then I have one more, well the technician is out on because we invoice per piece of equipment. So if they're asked to look at something else can make, how do they create the work order right from their mobile app for that next equipment?

DANIEL

39:00 Yeah. A couple of different things. So they're on site and maybe they found another service that needs to get completed. Is that what you're saying?

--- *Dispatch* ---

STEPHANIE

39:07 I, can you look at the ice?

STEPHANIE

39:09 Here.

DANIEL

39:10 Sure. Here, my... appointments calendar, this is where I can see all my jobs here on the mobile app, but this is also where I can add jobs to an existing service or location. So here, I can say, hey, we're out here at a hardware, which location Danny the one in C, what are you here for call?

--- *Assets* ---

DANIEL

39:34 A service call? Since we were on site, create that job. And now I can go ahead and enter a services that were completed here's. The timing material specifically for this one service. And then I can add in any other deficiencies, repair notes, files and you're good to go.

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

STEPHANIE

39:56 Okay. And now, is this linked to the same job number then, but it can be invoiced separately or is it completely dispatch either?

DANIEL

40:06 You can.

STEPHANIE

40:06 Either.

STEPHANIE

40:07 A separate?

DANIEL

40:08 Job number, you can link and have multiple services tied to the job number. And then once you have that work order executed, you can either invoice the entire job or you can semi in invoice, right? You can invoice or part of it some of it.

--- ST app contracts and pricing ---

STEPHANIE

40:24 Okay. Characters.

DANIEL

40:27 I think by project management, right? You may have, a three phase job where you need to phase, you know, you need to invoice phase one that has two different services, same workflow that I showed earlier, just.

STEPHANIE

40:41 That is nice. It stays on in one place, but.

--- Tech time tracking ---

DANIEL

40:48 And can ever clock into another job while being clocked into it, can't be clocked into two jobs as well?

STEPHANIE

40:54 That's great to hear her that's nice. So that will force them to clock out and keep the time, correct, the time stamping, correct? I like that a lot.

STEPHANIE

41:06 Is it the only thing we need to question I have is, how do we differentiate labor hours, job hours versus service hours? And can we do that?

--- Type of work ---

DANIEL

41:21 Sure. So, what do you mean by that labor versus service hours?

STEPHANIE

41:25 So, what we have is we have service technicians that work.

DANIEL

41:30 Or?

STEPHANIE

41:31 For the service department, but sometimes our install department gets behind and so service will share their man power and say, yes, you can go ahead and have four guys for the day, but we need to be able to charge that separately.

--- ST app contracts and pricing ---

STEPHANIE

41:48 We need to be able to do that separately where they can clock in and out of an install job. Can we create something for that? And?

DANIEL

41:56 Yeah, that would be done under labor, right? So you have different labor items. And so you may have like an hvac guy that's coming in for service or install that's coming in for service.

--- Tech time tracking ---

DANIEL

42:06 So, this is where maybe Danny has a couple of different labor rates. I've gotten install on a service labor rate. So that way when I'm going to execute on specific jobs at the end of the week, if you remember on the time card tool, it shows you all the different labor, the labor that shows you the different services that labor was allocated to. So that's how you'd be able to differentiate that Matt was on a service job versus an install.

--- ST app contracts and pricing ---

STEPHANIE

42:32 We have flexibility to, when labeling labor categories to be able to kinda create based on what we do. Can we change?

DANIEL

42:40 Age. Yup.

STEPHANIE

42:41 We can change the titles of it?

DANIEL

42:43 This would all be, this is all customize right now. What you're looking at for?

STEPHANIE

42:48 Okay. So we could say labor service or labor install?

--- Tech time tracking ---

DANIEL

42:53 Exactly. Yeah. Your, your for your line item?

STEPHANIE

42:57 Okay. Same thing, pto holiday, we can create that great.

DANIEL

43:04 Card, remember that all reflect. So when you're looking at the week overview, you're gonna see eight hours, pto, 30 hours, we're build two hours for certifications?

STEPHANIE

43:14 Okay. One other question about the labor is as far as labeling, if a technician was working for an install department, could they even drill down a little farther and say what job it was for within that labor structure? Or do they have to do that note somewhere... well, the labor is gonna get tied.

DANIEL

43:33 To the job. Don't forget that when you go back to the job that labors right on that job, I guess maybe rephrase that. Maybe I didn't hear it correctly?

STEPHANIE

43:41 Michael... I...

STEPHANIE

43:45 You have to go in the dispatch that goes out. Okay? That makes sense. Danny. Thank you.

DANIEL

43:51 Sure.

--- Customer engagement ---

DANIEL

43:55 But other than that, I mean, that, that's really the, I guess day to day activity used for service call, don't forget our big workflow of creating repair opportunities through deficiencies. This is just an application or opportunity for technicians to generate additional pull-through by reporting deficiencies and then getting that back to the office for them to review quote and send out through service, right?

--- Tech On-site ---

DANIEL

44:18 I know we've done that. So I don't want to hit that too much, but then we clock out, right? We say, hey, we're done for today. If for some reason going back to the beginning, I'm not done with today's, services. I'm not gonna check off that box that's gonna flag that we've got a job that still has incomplete services to be rendered. But for taste purposes, I'm done there's no need for a return trip. And now the office can just come in and simply look at the service call... and generate the invoice. Pull that over here. And that's what we're gonna tackle next here. How are we doing on timing guys be? Okay?

STEPHANIE

44:54 We're good. Yeah, I have one question on the customer signature. Yeah. Is there any way, to send it off for like an E sign in case a customer is not on site or?

STEPHANIE

45:09 I...

STEPHANIE

45:11 Sign something that the customer is not on the site that they can sign remotely?

DANIEL

45:19 Yeah, no, the not from my understanding. No. The way we used to do that during COVID, was that the technician would put an X at the customer signature line. They get a copy of the completed work and it's there just for, you know, internal tracking purposes. But yeah, there's no way I have to go back and look, but I'm not sure. How do you guys do that? Now? What's the current workflow there?

STEPHANIE

45:44 Na.

STEPHANIE

45:45 Na, but, the problem is, you know, there may be actually someone on site. They still just put a.

DANIEL

45:53 Right. I mean, that, that's how we handle it, they put an X there or they just create the actual work acknowledgement, but they don't capture the signature and maybe the office can email that out.

STEPHANIE

46:05 Okay.

DANIEL

46:08 But this is that review here, right? We got the job in Progress, but Danny completed his services. If we need to make a return trip, we go ahead and add another appointment to this service. Or maybe we had multiple different piece of equipment that we're working on.

--- ST app contracts and pricing ---

DANIEL

46:25 You'd have your service categorized by individual units. So that way you can break down time material for each unit that was worked on, whether it's by one technician or multiple. So I just want to preface that multiple services and appointments. And then each service appointment will have its own group of line items. So that way you can invoice separately and just have an overall understanding of cost and metrics.

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

STEPHANIE

46:49 Or we can invoice it all on one.

DANIEL

46:51 Yeah, or invoice all in one absolutely.

STEPHANIE

46:53 Okay. So that, will that'll be nice because that's nice. It, there's one source, right? Right? One source invoice. They don't have to log in. So we'll categorize those.

DANIEL

47:11 As you can see here too, here is that partsledger, you know, here's the po that we generated and feel for that one off part.

--- Tech On-site ---

DANIEL

47:18 It's already been updated with the po number and the cost. So again, anytime there's a reflection made in partsledger that will automatically apply to the job and to the work order, we've got our clock events. Some of our tech customer customers use clock events, more of a check and balance.

--- Tech time tracking ---

DANIEL

47:35 Hey, they've got 40 hours of driving but only 30 hours of billable, 30 hours of billable time. This is just a good indicator of what's going on throughout the week. Make sure that cards are right?

STEPHANIE

47:45 You go back up to that? Yeah... we got. Okay. We got how much time on site 22 minutes. Yup. How much dry time? Do we have? None, right?

DANIEL

48:01 Yeah. I only clocked in for 14 seconds. So I didn't have any drive time unfortunately, but.

STEPHANIE

48:06 If I were to reviewing that, let's just say we had two hours of dry time and our on site, I can manipulate that billable hours, right?

DANIEL

48:18 Correct. Yeah. The technician, I didn't do that or you don't have that default setup, no problem.

--- ST app contracts and pricing ---

DANIEL

48:23 You know what? We're actually gonna charge four hours because it took them three and a half or we have a minimum certainly do that. And it would be tied to a specific contract for your pricing which we'll discuss earlier. But just for mark up rules and a intentions attachments, this is going to tell the story of what happened... for and after pictures, a quick recap.

--- Invoicing ---

DANIEL

48:49 And now we just, we said this is ready to be invoiced. We're good to go create the invoice and service trade.

STEPHANIE

48:55 All...

DANIEL

48:56 Of our parts post are accurate... generate that invoice. And now you'll have you kinda like one final edit to review before I send that over to the customer.

--- ST app contracts and pricing ---

DANIEL

49:10 So maybe pricing didn't transfer over something happened. Somebody forgot to put an entry in. I can manipulate that data to make sure that we have the margins that we need before invoicing. And then depending on how we want to invoice that report on it, we can do things like, you know, time and material line items with or without prices. Grand total. Only, I, you can categorize by different groups and services. So again, if you've got multiple services on a job and you want to show the customer individually rooftop one was 400, rooftop view was 252 was 250. Again, there's so many different ways to categorize your pricing and reporting.

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

DANIEL

49:48 So I'm just gonna do grand total only. But at the end of the day, you get your invoice and you can either send this over to your accounting software to invoice, or you can do this through service rate. And essentially what happens is your customers receive an email to go ahead and review an invoice. Your company logo would be in the top left hand corner. However you're displaying your pricing max, terms and conditions. And then two things happen on the customer standpoint. The first is they don't remember this invoice. So now you've got a report that you've already built prebuilt for the customer to see they see the appointment, the services, maybe the before and after picture that you guys shared.

--- Invoicing ---

DANIEL

50:30 And now they remember quite frankly exactly what happened here. So I got this little piece here. So now they can pay it online. You guys can go ahead and set different options for your customers, whether credit card, achpo, you guys set the parameters and thresholds that your customers pay.

STEPHANIE

50:48 90 to 120.

DANIEL

50:50 Exactly.

STEPHANIE

50:53 To 2000 on the credit card. Yeah.

STEPHANIE

50:59 Okay. Say, now off, right? We don't have to do it that way option?

STEPHANIE

51:14 As, as you can see, right? When you're searching an invoice number, job number?

DANIEL

51:19 Everything's tied back to one document. So, that way, again, you're not searching through the customer profile to see an invoice that was done to, for a job six months ago.

--- *Invoicing ends* ---

DANIEL

51:27 Everything ties back to its initial landing page and it can all be searched right at the customer profile. Again, a customer calls in. They have a question, they have a question on the equipment. Maybe I just pulled the profile instead of locking that dispatch. So I can see, yes, we're out here a week ago or a day ago. Let me pull up and see what happened. We're waiting parts. Nobody got to that. So it's all going to be seen right, on the customer profile.

STEPHANIE

51:52 Sure.

DANIEL

51:53 You guys to answer questions?

STEPHANIE

51:59 And that invoice number is not generated until it's completed. And... at this point, at this stage...

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

DANIEL

52:08 Yeah. You physically have to generate that invoice as I did on the job, that's correct?

STEPHANIE

52:12 Okay.

STEPHANIE

52:14 Made a plan right now. Everything has to the invoice number, not the work order number like, well, but that doesn't really matter because we could use the work order number or the invoice number we chose to use. Okay?

STEPHANIE

52:29 The only thing you guys see is the invoice final invoice, right? So, how are you gonna know that something was on or three seven five nine seven invoice number one seven six five.

STEPHANIE

52:43 Danny, is the work order number and the invoice as well?

DANIEL

52:49 Yes. Yep. If I open up the invoice itself, it will have the work order number.

STEPHANIE

52:53 Okay. That works. I guess.

STEPHANIE

52:56 That ties in together. So when Patty receives that supplier invoice from your supplier, just have a work order on it. So she, the work order and it won't the invoice number won't generate invoice, right? And then when she goes back for the same... she would use the work order, whatever one we're using as a po would be the same. And can you see here? It's so the invoice number that's just after the fact. So when our tech go out, they're gonna use that three, zero three, one, one, zero, one two. And Patty will also be able to see that number on the final invoice.

--- *Invoicing* ---

STEPHANIE

53:45 So she can still use that same number. Know what I'm saying I do, but it won't work that way because when our customers pay, they write the...

STEPHANIE

53:52 Reference.

STEPHANIE

53:54 Voice not the work order number. They pay a based on invoice?

STEPHANIE

53:57 You on the same invoice number? Okay?

STEPHANIE

54:01 The invoice is, she can't put the work order number in Sage is invoice number.

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

STEPHANIE

54:05 Does that make sense? Because when, they pay their bills, it says, invoice number that's how we tie back to the receivable.

STEPHANIE

54:14 But why does she need to work with our number four per pursue?

DANIEL

54:18 She...

STEPHANIE

54:18 Doesn't she better this?

STEPHANIE

54:22 The invoices our suppliers are gonna show?

STEPHANIE

54:26 So, that's going to be for parts in inputting a parts, but it will never tie back to the invoice. You guys tie back.

STEPHANIE

54:34 That's that's real time that there's nothing to do with that. So, I lokright.

STEPHANIE

54:40 Yeah, it'll be fine. Yeah, it'll be fine because she has to be from a sales perspective. She's got to enter the invoice number from a parks perspective. From a, from a payables perspective, she's entering the word, well, but when she gets, the supplier invoice gonna have that work order number exactly. So, how is she tying that to the invoice number, she's not, you guys are, how are we tying that to the invoice number? Because you'll have?

STEPHANIE

55:06 Be there?

STEPHANIE

55:07 I mean, when she gets that supplier, but when she gets that supplier, yup, she goes and does whatever she does. Yup, sends it over to Jen, yup. And it will have the work order number on it. Jens gonna pull up that work order.

STEPHANIE

55:23 And...

STEPHANIE

55:23 Attach, she's gonna search by work order.

DANIEL

55:26 Not the muddy the waters don't forget partsledger is also going to have all that tied to it, right? So, when you're pulling up, that po or however you guys are creating the po, partsledger now has that item which is tied to the job and the invoice number all on that same line item link, there's you'll be able to see that clearly on the report, all the data that's tied to that specific item for accounting to see both job number and invoice.

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

STEPHANIE

55:51 And from what I understand, I apologize is if everybody does her job properly at the end of the day or at the end of a closed job, all the information is going to be there. That's the goal. I mean, if everybody from start from the initial phone call, he has to rate questions, the dispatcher were reviewing it. When it's done, the technician in the field takes his pictures. He says, I use this. This in this, the invoice five minutes after that call has been taken care of all this paperwork as in on the back end is not really no issue because we have all the information there.

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

DANIEL

56:30 Because we're all synced in real time, right? These aren't...

STEPHANIE

56:34 That...

DANIEL

56:35 We're all sourcing, and then putting our name on these are all ServiceTrade products that are our management and tied together so that every link brings you back to really the main surface of what the original problem was, which is really that ticket, that job number that has all the detail to the invoice. It's all tied right back to that main source of the original record.

STEPHANIE

56:55 I...

STEPHANIE

56:57 Do...

STEPHANIE

56:58 You add another service to that?

STEPHANIE

57:00 You know?

STEPHANIE

57:01 How you're saying a duplicate or additional service to this one work order? Yup. That's still is the same work order number?

DANIEL

57:12 Correct. That will still be the same work order number. If you choose it to be. Well, let me rephrase that. Yes, if you add another service onto this job, it's going to be the same work order that's correct?

STEPHANIE

57:22 Okay.

STEPHANIE

57:26 I did it. Did it. Yeah, it, we're gonna look it up by the work order.

STEPHANIE

57:34 It's just the.

STEPHANIE

57:36 Page. Yes, I get it.

STEPHANIE

57:38 Without being in sort straight, she more.

STEPHANIE

57:40 As long as that number, that work order number is correct, it'll flow. Yeah, right. Yep. Yeah, it really will.

--- *Purchase decision* ---

STEPHANIE

57:47 I can see how it'll I can enter it as long as you guys can ensure it's more important than how I can it'll flow. Okay. I think that through... Danny, I've got a question, yes, but it's gonna take us back a couple of screens. So I don't wanna, I'll ask it when you're done with what you're doing here. So if you wanna, I don't know if you wanna keep moving forward, I don't want the agenda is.

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

DANIEL

58:15 They was essentially to cover the dispatch, the technician workflow entry, and then the visualization of the office being able to review that job invoice it. And then all the data that's tied to that original job, whether it's an invoice a week later, a part that was ordered, not yet received, just wanted to know that this document is gonna link back to all the history that's ever happened.

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

DANIEL

58:36 And really any page that you search all this information is also going to have these links. So, if you're in partsledger or at the customer location or on the job, literally, each line item has those several links that you can easily see and click on to access. Other than that, that's it. I think I covered a lot of, I mean, I think we really covered everything.

--- Tech time tracking ---

STEPHANIE

58:56 I...

DANIEL

58:58 You guys, what hasn't been seen yet?

STEPHANIE

59:00 Okay. I have one additional question. Danny, could you get back to the screen that Mike was asking you a question about that shows travel time versus the time on the job and the total?

DANIEL

59:11 All right. So, the Clark events?

STEPHANIE

59:14 Yeah, exactly.

--- Tech On-site ---

STEPHANIE

59:16 Yup. So I'm just trying to wrap my head around this currently, if a technician leaves a site and drives to the second site, the way that we build right now, the time for that second call starts when the technician leaves the first call, that second customer pays for their travel time and their time on site and it ends when they're done at that location. Does that make sense?

--- Tech time tracking ---

DANIEL

59:46 Yeah. So the time is billed from the time I leave my driveway to head the customer to, that clock starts all the way up in the, into the time I finish and complete that job?

STEPHANIE

59:57 Yes. In essence, yeah, driveway of either the human house or the call previous to the second call. Yes. So.

DANIEL

1:00:07 Essentially in route and onsite time is going to be billed, to the customer that I'm driving to.

STEPHANIE

1:00:12 Exactly. So my question is I know Mike and Ryan would like to see travel time versus onsite time separately for them to wrap their head around the cost, of what it takes right?

--- Tech On-site ---

STEPHANIE

1:00:28 For, for people to drive around versus on site. So from a reporting standpoint, I see the importance of that. However when a customer signs off, we're done here, review what we did today. On site time was 22 minutes in their mind. They're gonna get back build for 22 minutes and they have proof they signed for it, but we're gonna take that in route time.

--- Tech time tracking ---

STEPHANIE

1:00:51 We're gonna add it to the onsite time and that's what we're gonna Bill it or in the back office? How do we work that to achieve both goals, the reporting of dry time versus onsite time? But also the billing time where the customer knows you're also gonna get charged for that 30 minutes that technician took to get to you.

--- Tech On-site ---

STEPHANIE

1:01:14 Let me ask, add one thing to that. If I'm not mistaken when the customer signing off, he's signing off or the work completed, and not necessarily a set on site. Is that correct? But you can, that's why I understood that previous.

STEPHANIE

1:01:28 Do they see it? Do they see the time? Do they?

--- Tech time tracking ---

DANIEL

1:01:33 Does the customer see the time stamp?

STEPHANIE

1:01:35 Yes.

DANIEL

1:01:36 No, you turn that off. That's only, for office again, you have complete control over everything when you're creating your account. I never want this customer to see clock events that's natively turned off. That would force somebody to physically override that from an admin level.

STEPHANIE

1:01:50 Wonderful. I just that really was the, because it is nice to be able to see travel time versus time on site. I just don't want the customer to think they're going to get built for something that we add travel time to.

DANIEL

1:02:01 I mean, at the end of the day, it's a part of the job, right? You got Warner on the vehicles. You're paying insurance. You've got gas, right? I mean, it's a being a technician, I understand a feasible charge to charge at that time, right? And some customers have a minimum of pay. We've got a minimum of 30 minutes, right? Because they incorporate drive time with that. But at the end of the day, yes, you guys have thresholds and directions on what the customer sees. Doesn't see how you want to manipulate the billing. And then one of the reports that comes off top of mind is the technician scorecard report. So I can categorize for the entire week, you know, how long was Danny on site for versus driving, right? Do we need to go ahead and maybe change his schedule so I can get 90 percent of the time he's working versus 10 percent he's driving. So I'll give you a scorecard and then what revenue they've generated for the week, that would be, the first and probably most important or, I would rely on for time versus time work versus time would not work.

STEPHANIE

1:02:59 And that's Danny that's what I call, our distribution cost. You know, what the cost is to get our guys mobile every day and we do work with the geofence. When we start charging our customers and guys clock out. And that's my big concern is okay, whether they're within the geofence or outside of the geofence.

--- ST app contracts and pricing ---

STEPHANIE

1:03:15 Am I just paying for them to drive around? You know, they'll drive out of the way. I think sometimes they'll send the geofence to be on the fly, sure that's and I call that distribution costs. So the reports will help me value or distribution costs are, and how we improve our billable versus our distribution costs or the travel times?

--- Dispatch ---

DANIEL

1:03:35 Yeah. And I think so, you know, the scorecard does that? I think the other piece that would help some of that would be minimize this once you kinda have an accurate headcount?

DANIEL

1:03:54 Of what's happening is, you know, when you're pulling up, you're gonna be able to run a report server, that says, hey show me all the jobs that are unscheduled that I need to go ahead and dispatch out to my text actually at based visual of where all the jobs are, where technicians are currently scheduled to be. So that way you're also controlling more of the direction they're heading the goal there is, hey, I've got three jobs within like a 30 mile radius. There's no way Danny should be over here. So I'm gonna kinda groom his day to help organize it. I think it's a team effort as far as that's concerned because it's you won't have so much control from the office.

--- Tech time tracking ---

DANIEL

1:04:30 So, I feel like this would be a good vantage point to control some of that. And then the clock events versus actually actual time build that would show up either on the report card or on your time card tool, so you can kinda see what that weekly occurrence is and where their time is being spent.

STEPHANIE

1:04:46 Exactly, is there any GPS abilities within service trade or?

DANIEL

1:04:53 No, only when they're using the clock events, it's gonna tag their location at the time of the clock event. And it's also gonna let you know that, hey, when Danny clocked in, he was actually X mono Miles away from the physical job that he's supposed to be on. So don't manipulate that much.

--- Accounting integrations ---

STEPHANIE

1:05:10 I'm gonna ask brag version the using asset tracking for the vehicles. I didn't ask, but we, because we got a sample where they're at.

DANIEL

1:05:19 And that's...

STEPHANIE

1:05:19 That's kind of what our checking. We can talk about that more because that's a significant stage that.

STEPHANIE

1:05:25 Absolutely.

STEPHANIE

1:05:27 I mean, it's nice to know, but we can rely on this, to know that they're mobile?

STEPHANIE

1:05:33 Looking for like a partner?

DANIEL

1:05:34 We work with this company. Is they're a pretty solid company as it relates to like tracking equipment, vehicle tracking, things like that. Having a, and the dashboard, they work really, our customers said they work really nicely with them. So we partner with them. But if that's something for a future goal, I think it's pretty cost effective, but definitely something we can discuss like vehicle tracking and different options.

STEPHANIE

1:06:00 This.

STEPHANIE

1:06:03 I mean, sure.

STEPHANIE

1:06:04 Absolutely. Yeah.

STEPHANIE

1:06:06 Yeah. I think for me, I mean, I'm sure we're gonna have questions that we talked about it, but you really simplify the workflow for me in my mind and the capabilities, of using two different purchase orders whether it's generated one or work number, the distribution cost, the key reporting that we're looking for the ease in the field.

--- *Accounting integrations ends* ---

STEPHANIE

1:06:29 I just, there's a lot of things I see that we like about and then we can turn around and invoice if everybody does everything properly. So you answer my question?

STEPHANIE

1:06:37 Just...

STEPHANIE

1:06:38 Call.

STEPHANIE

1:06:40 Yeah, me too, Danny, my biggest thing that I was concerned about where those POS and generating for parts and how that would flow through the system.

--- Accounting integrations ---

STEPHANIE

1:06:48 And you and I talked about when you and I talked separately, we talked about the accounting piece and if we wanted to integrate Sage with service trade and maybe working through service trade for a year, getting our feet wet and getting used to it, and then having that discussion.

--- Accounting integrations ends ---

DANIEL

1:07:07 From now, yeah, that would be my recommendation that's where I see all the successful integration users come into play because you don't know what you don't know.

STEPHANIE

1:07:15 Yeah.

DANIEL

1:07:16 That's a lot more reporting capability than most people understand and realize they can rely less on accounting and more on service trade or, you know, the manager.

STEPHANIE

1:07:24 Yeah, absolutely. I'd like to proceed that way like, I'm not opposed to integrating on, but I sure would like to get our feet wet with the system first before we have that discussion or if we even need to?

STEPHANIE

1:07:36 Hey, Danny, can you show me how a technician would make their own dispatch for on call or after hours?

--- Dispatch ---

DANIEL

1:07:46 Yeah, that was the same. Let me pull this up here. Give me a minute. I got to unplug because my computer is sign, but essentially, it's the same workflow of adding a service onto a job? You have a list of your appointments, you create the appointment and then go from there.

--- Dispatch ends ---

DANIEL

1:08:03 But give me one second. You guys still seeing the screen here? Yeah, perfect. All right. Just gotta open up my quick time over.

STEPHANIE

1:08:16 Yeah, right. I...

STEPHANIE

1:08:19 I ask one other question after that?

DANIEL

1:08:22 Okay. Switching screens?

STEPHANIE

1:08:25 Invoicing, standpoint, you have things tie together? Okay. Yeah, you can use that as.

--- Access to information ---

DANIEL

1:08:35 On the mobile app, itself, right? This is where you can go ahead and pull up full screen, do a couple of different things, right? You can create your own jobs, quotes, go back and look at things, add to a job. It's all done here. But if I'm on a service call midnight, I go ahead and add that job.

--- Access to information ends ---

DANIEL

1:08:50 Again, I searched the customer. It was as hardware. I type in the type of call. It was mercy service call that came in. And then again, I'll put the time.

STEPHANIE

1:09:02 That's really nice. It's right on there and...

DANIEL

1:09:06 Save it. And now, as I'm going through that, I'll go ahead and say, hey, here's, everything I did.

--- Quote templates ---

DANIEL

1:09:11 So this was the equipment and they can either have templates built in. So if they don't want to type everything out, you can build those, put those templates in there for them to access.

STEPHANIE

1:09:19 Okay.

DANIEL

1:09:20 Again, I'll go ahead and say I was working on the hvac units.

DANIEL

1:09:27 Which service I was on... the work that was done, if it was completed or not.

--- Quote templates ends ---

DANIEL

1:09:35 And then I save that and that turns into a specific into a general work order. And then the dispatch gets updated as well. So you can see that right? When you come into the office in the morning.

--- Tech On-site ---

STEPHANIE

1:09:43 Okay.

DANIEL

1:09:45 And you can even create quotes. If you're out in the field, right? Maybe you're super supervisor route there, you're in the front of a customer, you want to create that quote right in the fly, you can do that as well.

STEPHANIE

1:09:55 Okay. And then, my, I guess last question is if there is a completed call, but Stephanie or I have a question, a specific question for the tech. Is there something that notifies them that, hey, there's a question or something that's not complete here that we need you to look at?

DANIEL

1:10:19 Yeah. There'd be a notification which drops through email, and then I can go to my completed call list, open up that completed call and maybe got a picture of the receipt that I took or something like that, I go ahead and update that right in the fly?

--- Tech On-site ends ---

STEPHANIE

1:10:33 Okay. And how does the technician see that?

STEPHANIE

1:10:37 There's a notification?

STEPHANIE

1:10:38 Notification. Yeah.

DANIEL

1:10:40 That's correct. Yep.

STEPHANIE

1:10:42 So, Danny, would they get it, would they get an email or is there a way to text them through the system?

DANIEL

1:10:49 You can do you, if you catalog the number correctly, you can use the texting but it's set up natively for email only, not email only, but it's natively set up for email, but you can categorize it. So it comes through as a text as well.

STEPHANIE

1:11:03 Okay.

STEPHANIE

1:11:03 How you?

DANIEL

1:11:04 Input the information under like the phone number?

STEPHANIE

1:11:08 Okay.

STEPHANIE

1:11:09 That makes sense. I letting of iPad.

STEPHANIE

1:11:11 So, if we had a question on something, we have to email them and they have to go into their email to get that.

DANIEL

1:11:21 Chat, right? I mean, some companies have like slack on their company phones that they use, right? How do you guys communicate now? Text or?

STEPHANIE

1:11:29 We have SMS through the software and then also text also call... however we get an answer depending on if you need an answer.

DANIEL

1:11:46 You're calling or sending them attacks, right?

STEPHANIE

1:11:49 I guess what's the?

DANIEL

1:11:54 Yeah, very simple to do to create the job, notify them with an email. If...

--- Assets ---

STEPHANIE

1:11:58 You're sitting on?

STEPHANIE

1:12:00 One more little tiny question. Do you have in the assets when they're adding equipment? Do you guys have the capability of them scanning it and it pulls it over? Not natively. No. Okay. Sure. Where they can scan the model member and not have to type it all in. Got it. Okay?

--- Access to information ---

DANIEL

1:12:22 Yeah. Not native app. I will say there's a cool little widget that you can download on your phone called scan key SC a NKEY and all scanners, it's a copy and paste. So it's a widget on your keyboard that actually pops up. So that allows you to then use your phone as a scanner, but it's not a supported service trade product. But if it's something you want...

--- Parts management (inventory) ---

STEPHANIE

1:12:46 I shut it out.

STEPHANIE

1:12:49 Questions. No, no, maybe you touched on, this partsledger, can you use a scan it with code or code inventory? Yes, you that capability like a scan it.

DANIEL

1:13:07 In part center, yes, yep.

STEPHANIE

1:13:10 No, but it's a really good.

DANIEL

1:13:14 Basically sites and stuff like that.

STEPHANIE

1:13:17 Yeah, everything has a, okay.

--- Purchase decision ---

STEPHANIE

1:13:20 No... I think you answered all our questions or we're gonna have more or, but not nothing that we can, I don't think answer through email right now.

STEPHANIE

1:13:30 Me too. I just, I feel like after we got a lot of good answers, I made a lot of answers.

STEPHANIE

1:13:35 This is Amazon prime right now. Danny, do we qualify frame?

--- Purchase decision ends ---

STEPHANIE

1:13:40 That time?

STEPHANIE

1:13:47 My wife was just telling me.

DANIEL

1:13:48 Her air pods keep dying after an hour and a half and she's like, hey, it's a, that.

STEPHANIE

1:13:54 They were on.

DANIEL

1:13:56 That. Yeah. So, you know, that being said, I mean, where we're at. I guess that's why I want to ask you guys was to recap a timeline, right?

--- Purchase decision ---

DANIEL

1:14:07 I know we tried to get it done or I selfishly was gonna try to get it done before the end of the quarter if it made sense. Seems like we're now into a heavier evaluation with a lot more questions and indepth, measures of evaluation. But, you know what's your timeline one and two between ServiceTrade and BuildOps? You know, how do I fit your mold, and is there a front runner for you guys yet?

--- Purchase decision ends ---

STEPHANIE

1:14:30 Well, we've got one more training go to the exact questions and answers that we had for you today. We go up on Wednesday.

STEPHANIE

1:14:40 Yeah, I...

STEPHANIE

1:14:41 Think you can answer that man. But I think what you did do is you really cleared it up and you made us realize the ease of low on this. And I love it. I mean, that's where I met with it but, you know, I haven't seen the other either. And I've got one more history with it because I know some other contractors are using it that log as well. So, that helps. So, yeah, that's part of.

--- Purchase decision ---

STEPHANIE

1:15:04 Yeah. Our goal this week was to go ahead and just like you said, really drill down to the very last final round of questions that we had with both software programs and you did a great job, say answered everything that I had that was outstanding. And I think everyone's not in their head around the table. We have that call with BuildOps tomorrow, like Mike said, ask the exact, pretty much same list of questions, help us understand. And then we're done. And then we're gonna make a decision and move forward. We had talked knowing that you guys have a 12 week ramp up committing by the end of July committing to somebody either you or BuildOps committing, making sure that we have our ducks in a row.

--- Implementation and ongoing support ---

STEPHANIE

1:15:48 So we have three months of ramp up, which would be September, October and November with a launch of December one.

DANIEL

1:15:55 Okay, good. Yeah, you guys have great expectations of onboarding. Again. This isn't going to be a fly by night over overnight thing by any means. It's...

STEPHANIE

1:16:05 No, we don't want, we wanna do it right on your side and our side.

--- Purchase decision ---

DANIEL

1:16:11 Yeah. I'm eager, to partner with you guys. It's been a couple of years. I know, we met a few years back and, I really feel like it's a great fit. I mean, that wholeheartedly I'm glad that we connected again. And so, you know, as you're going through whatever questions you have next, let me know.

--- Purchase decision ends ---

DANIEL

1:16:26 I'm here to earn your business in the partnership, you know, more importantly, not just for this year, but long term definitely don't want to be here again in three or four years. So that's my goal for the team is just get your, you know, your trust in business, and be a partner.

--- Purchase decision ---

DANIEL

1:16:40 So let me know how the meeting goes tomorrow. If there's any other questions that may arise during the final thoughts for you guys and then for us to kind of recap and discuss pricing, right? That's going to be the next thing I'm sure BuildOps is going to get aggressive with pricing if they know we're involved. So that be a conversation for us to have. So I can honestly sit down and let you know where we're at, and what those options look like. Okay? I have that conversation, when would be, I guess a good time to follow up with you guys to sit down so, you know what the numbers?

STEPHANIE

1:17:11 Yeah. I think if we could possibly step into your Thursday Friday, right? As far as pricing goes, I think Mike, you and I can probably wrap our head around the pricing piece and not take up everyone else's time as long as we know what software, you know, we're leaning towards them. Then we can start talking about more aggressive pricing. So, you know, probably first of next week, Danny, Mike.

--- Purchase decision ends ---

STEPHANIE

1:17:40 Yeah. Monday.

DANIEL

1:17:43 How about either Monday afternoon or Tuesday morning? Whatever works best for you guys?

STEPHANIE

1:17:49 Tuesday morning, I get my page to Christie at one o'clock on Tuesday, Monday is just for.

STEPHANIE

1:17:55 Let me just pull it up on my calendar and make sure I don't real quick. Danny. If you have your calendar in front of you, we could probably go ahead and... look at Tuesday or excuse me. Monday would work better for Mike?

DANIEL

1:18:11 Realizing my video on, I will share my screen.

STEPHANIE

1:18:14 You're good. All right?

STEPHANIE

1:18:15 Let's see here.

STEPHANIE

1:18:19 Yeah. The seventeenth, I'm pretty wide open that day to be completely honest. So what would work well for you, Danny?

DANIEL

1:18:27 Let's see. So for the seventeenth, we've got Monday afternoon... one o'clock two o'clock work for you guys.

STEPHANIE

1:18:37 One to two, two o'clock would work great. Danny.

DANIEL

1:18:42 Okay. I'll send out a calendar invite. And for the invite, you just want me to send to Mike and Chris, is that what you said?

--- *Purchase decision* ---

STEPHANIE

1:18:47 You want to be involved in pricing at all? No, yeah. Mike and I are fine for that one.

DANIEL

1:18:52 Okay. I'll...

STEPHANIE

1:18:53 Get...

DANIEL

1:18:54 Here.

STEPHANIE

1:18:55 Okay. That sounds awesome. And Danny, can we just set the expectation from that meeting that you're just gonna give us the best pricing that you have a.

--- *Purchase decision ends* ---

STEPHANIE

1:19:01 Well...

STEPHANIE

1:19:01 Look at it. Yes, ma'am, okay. So much appreciate you guys time at.

STEPHANIE

1:19:09 Guys?

The End