GONG

ServiceTrade Demo with Mechanical Service Corporation

Chris Kidwell with Mechanical Service Corporation
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Participants

SERVICETRADE

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SDR

MECHANICAL SERVICE CORPORATION

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Service Manager

OTHER

Topics

Transcript

PETER

0:00 Can you hear me?

PETER

0:00 Hear me?

PETER

0:01 Yeah, you can. Can you hear me?

CHRIS

0:03 I do. Gotcha.

PETER

0:05 Cool.

CHRIS

0:06 Just give me one second. Hang on one sec.

PETER

0:08 Yeah, no problem. Chris is actually coming in here too. I just needed a minute.

CHRIS

0:22 Cool. Sorry about that. I'm gonna apologize. I'll turn my video on for a second so you can see that I'm a live person, but I'm having, some internet issues. So, how are you doing? Cool. How are you? So I'm having some internet issues. They're running a new line at the top of my street. So it's kinda going in and out. So it might be a little wonky. Okay. Just to give you a heads up. I'll probably have Brett join in case my internet clocks out, which has been out a little bit today. So, if we change voices, that's why?

PETER

0:55 No problem.

--- Accounting integrations ---

PETER

0:57 I got Christmas. Siri. Is going to be joining with me. She should be in any minute. She's kinda the accounting side of what we do here. So, I know she's got questions. I know you guys aren't accounting, but... I ask on who you guys kinda recommend? How that kinda works together, and such?

CHRIS

1:20 Yeah. And from what I gathered, you guys are on SL now?

PETER

1:25 What did you say? S, L?

CHRIS

1:27 Yeah, Microsoft Solomon.

PETER

1:30 We're on dynamics. Great. Yep.

CHRIS

1:38 Yeah. So, they have a great planes, SL... two different kinds of brands, but similar. So that makes sense. So great. Planes, are you guys... why is it doing that?

--- Accounting integrations ends ---

CHRIS

1:52 Are you guys planning on staying on dynamics, or moving off of it? What does that look like?

PETER

1:57 I...

PETER

1:58 I think, I don't know that we've outgrown it. I feel like it's... become a little complacent... I think we're ready to step into the new world a little bit.

--- Paper process ---

PETER

2:14 It's a little bit outdated. We are a excel driven company which excels, a great tool, but we have so many different documents and stuff running out in excel that we're constantly flipping through screens. It doesn't work together and it's just a pain in the butt to be honest.

--- Type of work ---

PETER

2:35 So, and I think kinda the biggest thing, my biggest gripe with great plans is their scheduling platform which is called the schedule. It's really been tough for us to proactively schedule some of that being on us. I do know that we're 90 probably 90 to 95 percent service based company and our day gets changed on every couple of minutes to be honest.

--- Type of work ends ---

PETER

3:09 So, you know, something at least to be able to throw appointments out there, start building this schedule to be a little bit more proactive. That, that's a huge thing that I want to start pushing. I have talked to a couple of guys that do use you guys. One of them being Willis mechanical out of Georgia. So I'm pretty good friends with Chris down here. I met actually another guy at the msa conference that was on one of the YouTube demos or sales promos out of Georgia as well. So.

CHRIS

3:45 Okay.

PETER

3:46 Yeah. I guess kinda, the whole point of this is, you know?

PETER

3:50 What?

PETER

3:50 Can you guys offer us, you know, what does it make sense?

--- Pricing ---

PETER

3:54 You know, with the price on everything, what it would look like for how many texts we got, and all that?

CHRIS

3:59 How many, how many guys do you have out in the field? I'm sorry.

PETER

4:02 We...

PETER

4:03 Are...

PETER

4:03 Right now 33, but definitely scaling up. When I first came into the office here about 10, nine years ago, we're about 1918 guys.

--- Pricing ends ---

PETER

4:16 So for us, it's been a pretty steady growth, you know, a lot of newer guys and we continue on growing and making it better. So, you know, how that all looks is pretty important to us.

CHRIS

4:30 Okay. So so you talked to Chris Willis, talked to somebody else down in Georgia. So what do you kinda wanna see today? I can go over some scheduling and dispatching stuff. I put an astro up on the top of that because... literally as we are speaking, our whole new scheduling dispatching platform is being relaunched. So, so, so whatever I can start showing you some things today, but you just kinda have to know that it's going to be... way more intuitive.

--- Accounting integrations ---

CHRIS

5:02 If, if server strait is the right fit, it's going to be way more intuitive when you guys move forward with service straight if that is right. So, so some more bells and whistles, and we'll get into some of that stuff. I'll talk a bit a little bit about it, but we're also putting a whole bunch of AI behind scheduling dispatching too.

--- Accounting integrations ends ---

PETER

5:17 Yes.

CHRIS

5:17 Using some AI of show me the most equipped tech to handle this specific call based on those parameters. Show me the right, we can get there the fastest based off of whatever's happening in the world today. So there will be a bunch of AI behind it. But we'll talk a little bit about that when I show you some scheduling dispatching and, what else do you kinda wanna see today?

--- Accounting integrations ---

PETER

5:37 I know she didn't come in yet and he's gonna get a little bit of wrath when she comes in here for me. But as far as course, she's the accounting side. So, you know, the whole accounting side of GP, you know, is that something that does work with you guys, like what accounting software works for you guys, is kinda my biggest

thing. She has no problems really with her side of the accounting. I have it on the server side.

--- Accounting ---

CHRIS

6:07 Yup. So we need to just see if your guys version of great planes can accept file imports. Okay? And then from there, we need to, if we can verify that they can accept imports, we need to get the data format that you guys will be required to have to accept those imports. The way this works with great planes, is we call them stack recipe, service, trade, accounting connect or recipes. So we're obviously managing a bunch of the data in the forefront of the office of, you know, cost labor time, et cetera. All of those things and we can dump them out into an excel or CSV file and we use a stack to jumble them up and put them into a format that great planes can accept.

--- Accounting integrations ---

CHRIS

6:57 And then you guys import that data file into great planes based off of those requirements. And then we'll hit great planes with all the data that you guys are required to have.

PETER

7:08 Gotcha. Okay. So it would be a new thing with GP. It's not something you guys, I guess familiar with. Yeah, right.

CHRIS

7:17 Well, so yes and no. So it would be, it's we've done this with great planes before. We have some people on great planes that are doing this. So it's not new, but it is not an integration. And I use that term, you know, lightly because it's not like a two way push where we're pushing data back and forth.

--- Invoicing ---

CHRIS

7:37 It is an import export where you're going to have to click a button to send the data. Okay? And that's just some of the limitations with GP.

PETER

7:45 And that would be something that we would have to do as far as literally clicking a button in order to make all that transfer regulate.

--- Accounting integrations ---

CHRIS

7:54 Yeah.

PETER

7:54 That's pain. Hey, and that, that's part of it too. And, I wish you'd be here to hear it. You know, maybe that's the reason why we get off of that too. So, yeah, what recommendations I guess you have for... the accounting side that would be important? I know you that I was talking to you, I think Sean at the trade show there.

CHRIS

8:22 Okay.

PETER

8:23 And there was something that the one that he was pushing doesn't do payroll. So that's something we can talk about, I guess.

CHRIS

8:31 Yeah. So, so I am recording this so, you can hand this to Chris and she can review this. And so, some of the accounting conversations, you know, again, we are not the accounting system.

--- Accounting integrations ends ---

CHRIS

8:43 I can refer you guys to whoever... the two, that from our short conversation that we've had would be NetSuite or impact.

PETER

8:55 NetSuite?

CHRIS

8:56 Yeah, it's an Oracle product. Great with service, very intuitive new age software. We have a really cool integration with NetSuite with a lot of two way pushes.

--- Accounting integrations ---

PETER

9:12 Okay.

CHRIS

9:13 Cannot answer the payroll question.

PETER

9:18 One of those is what you is mentioning. You said NetSuite and what was the other one?

CHRIS

9:23 The other one would be intact.

PETER

9:27 I've heard of them before?

CHRIS

9:29 Yeah, which is a Sage product. It's sages new cloud version, ERP system again?

PETER

9:36 You know, that might have been, it might have been Sage intact.

CHRIS

9:40 Yeah. So Sage does now have payroll... still relatively new being in the last nine months or so so I can't speak on that behalf, but I do know that they do have payroll and there's a really good Sage reseller up in your neck of the woods called a cord.

--- Accounting integrations ends ---

PETER

9:57 Okay. He's...

CHRIS

9:58 Up in, I think Madison, New Jersey.

PETER

10:01 Okay. Sure. Yeah.

CHRIS

10:04 So, good guy. They do a good job up there.

CHRIS

10:11 Let me, so that's kind of the accounting conversation, what, you know, what else do you kinda wanna talk about? Just sharing a slide show, so we can kinda have some background noise? Yeah.

PETER

10:26 I mean, I don't know if we can see how like a normal flow would be or if that's kinda customized to... everybody's companies? Yeah. So some, I guess kinda from, you know, when a call gets entered or new customer calls, you know, how does that get entered and a call get set up and entering customer contact information and dispatching? And kinda start to finish if we can kinda go over something like that?

CHRIS

11:02 Yep. Absolutely. I mean, a couple of quick questions. Do you guys have a big preventative maintenance side of the business?

PETER

11:09 Yeah, it's probably about 35, 40 percent of the company. 35 percent of the company is our PM based. We've got a pretty heavy.

CHRIS

11:22 Big focus on pull-through revenue?

PETER

11:24 Absolutely. Yeah. And more now than ever. To be honest with you, I mean, we're doing what we call 451 which is a service quote. We're doing so many more now nowadays is... yeah, we had a lot of customers where they were just okay on the TAM side where, right?

--- Quote templates ---

PETER

11:45 Just go ahead and go get the parts. Do it now, you know, with the cost, the increase on cost of the parts and everybody just being a little bit more cautious on how much they're spending, they want prices on everything. So that's something. If I don't know what you guys have as far as the tech side, you know, the proposal in the field and generating that, what that looks like.

--- Quote templates ends ---

PETER

12:08 That would be huge for me. I appreciate it. Something on that currently we're not doing that, everything is pushed through the.

CHRIS

12:15 Office.

PETER

12:16 Which is a huge time site.

CHRIS

12:19 Okay. You, you want your text to be able to quote out in the field?

PETER

12:23 Up to a certain dollar amount? Yeah. And then I don't know if there's a way to kind of scale that as, you know, some guys will feel a lot more comfortable with than the others, but, you know, it's something as small as, you know, the customers got a couple of contractors and they need a price on it. It's like, you know, that really shouldn't be coming through the office where I'd rather almost like them to get beside pulls out in the field at that point.

CHRIS

12:47 Okay. And then is that more of a, hey, yeah, just go ahead and fix it. I don't have to have approval.

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

CHRIS

12:54 It's 100 bucks, just do it or is that more of a, no, we need an actual formal quote because we've got to track the process and have that quote turned into that whole process.

PETER

13:04 Nowadays, it's more and more that they do need a formal price and not that they need the actual paper in front of them.

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

CHRIS

13:13 As...

PETER

13:13 At that moment, but you know, something where if they were to show them on the tablet and hey, this is what the price is going to be to do you're all right with it having sign off, and it's a sole job at that point?

CHRIS

13:24 Yup. Okay. All right. That makes sense. Scheduling dispatching that's the quoting process. All right. Well, let me give you guys kind of a sin dig. And, and again, we're recording this so that you'll have it in your inbox... as you kinda go through this process. So, so I'll ramble on for a couple of minutes, feel free to fire away with some questions, but we'll kind of go through a preventative maintenance call, capture a deficiency, do some scheduling dispatching, and just kinda let you guys see, what it really looks like at a super high level.

PETER

13:59 Okay.

CHRIS

14:01 So, a little bit about us, we've got over 1,300 customers using our platform in North America, got 13,000,000 assets managed. So, what we consider an asset to be a piece of equipment, whether it be an RTU, or a chiller or boiler, 10 percent of the commercial industrial buildings serviced in America are being serviced by service trade or customer using service trade. I should say.

--- Assets ---

PETER

14:22 One other thing if we could throw it in there as far as... you know, specific unit, keeping track of certain arts. And so task management, I guess so looking at as well.

CHRIS

14:39 Yep. So we will handle tasking. So all your tasking. So, so we'll handle all of your and I'll talk a little bit more about this here in a second. But all of your tasking, all of your preventative maintenance quotes with a database behind the scenes that will tell you if you got a 20 ton rem unit plan on four PMS with eight hour each PM and you're going to need four filters and four belts, et cetera.

--- Assets ends ---

PETER

15:01 Here's Chris now.

CHRIS

15:03 Hey, Chris, I.

PETER

15:05 How are you?

CHRIS

15:06 I'm good. How are you?

PETER

15:08 I'm good.

PETER

15:09 We did a quick overview of, you know, some of the things I, I'm definitely interested in. We did talk about first, the accounting side of things. Chris did say that, they can use GP, but, it seems a little clunky in my opinion. Do you agree with that?

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

CHRIS

That's...

PETER

Kinda, you're saying, you basically have somebody's got in order for the workflow to process through somebody's gonna have to click a button in order to go. Is that correct?

CHRIS

Yeah, that's fair.

PETER

But that is kind of what is happening now when we sync when the guys sync out in the field, isn't it?

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

PETER

And then we commit it, which is what Cathy our billing person does. She actually has to review and edit all the hours and then she commits it. So, is it another step besides that?

CHRIS

No. So it'll be a very similar step. What I would say is the old adage of 10 minus six plus two. We're still in a net efficiency of minus four, but there is going to be a plus two somewhere. So it is going to be a button where you're going to have to click of, I'm actually want to send this data, to GP, but the efficiency of the text aren't going to have to actually push buttons out in the field when they're done right? They're just gonna say that I'm done and everything's going to happen all the, so all of that, the scheduling dispatching, there will be no clicking buttons. You'll just kinda drag and drop and schedule it and everything will just be done. We do have a review process and we'll go through some of that today to make sure that the invoice, the invoice is right?

--- Accounting integrations ---

CHRIS

The work orders, right? And everything looks good. So less clicking there. But it is still clicking of a button to get that file into GP.

PETER

Right. Okay. You did mention Chris mentioned that, the two accounting softwares that they would recommend if we're to go off the GP or NetSuite by Oracle and intact by Sage, which I've heard a decent amount of that stage. Not that it really applies to us, but they do have payroll incorporated into it now.

CHRIS

17:18 Are you guys union?

PETER

17:20 We are.

PETER

17:23 Gosh.

CHRIS

17:28 So, so for, if you do not have a big Construction department, those are the two probably most popular.

PETER

17:37 You move for the accounting?

CHRIS

17:39 From the accounting side, yeah, that we have an integration with.

PETER

17:43 Okay. So... if we want to do more Construction based accounting, like because right now, what we do is we have GP dynamics but we do all of our like we use it, for pulling data.

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

PETER

18:00 But all of our management report, monthly management report is all done manual like all our earn build and Progress billing and all that we Bill it through GP. But then to get where we truly are, a lot of it is external. So if we wanted to put that job costing and that side of it, you're saying these two platforms aren't really good for that.

--- *Accounting integrations* ---

CHRIS

18:24 So that is a question that I cannot answer. You need to talk to a Sage rep or a NetSuite rep because I'll probably talk out a line. Sage is well known in the Construction space with a bunch of, the Construction management pieces. They've had Sage 50 90 peach tree, Sage, 100 Sage, 300.

--- *Accounting integrations ends* ---

CHRIS

18:45 Their new baby is intact. They're migrating a lot of the Construction stuff into intact NetSuite. I don't think is going to go into the Construction space. They're strictly service.

PETER

18:55 Okay. So real quick, Chris, I just wanted to give you like a scenario of how it works now, so you can give me some idea right now.

--- *Accounting integrations* ---

PETER

19:04 Great plans and dynamics. Again, we use it for that accounting side, meaning our general ledger, file, balance, bank wrecking, we don't use it for payroll. We enter that like on a manual basis because we have an outside provider for payroll.

CHRIS

19:22 Got, who do you guys use?

PETER

19:24 We use a company called what was beyond pay?

--- *Accounting integrations ends* ---

PETER

19:25 And then now it's centrally HR... and they do a really good job. So really what happens is we implemented then the wind soft side of it, which is the service side of it. We can issue appointments, issue, the service calls, send the guys their information on their tablets. At the end of the day. They still have like with service trade. I would think they still have a piece of the puzzle meaning they have to enter their hours. They have to enter their resolutions and everything, and they sync it back to the office just like we're doing now. And then we commit the time. So when you say there's an extra step if we wanted to stay on great planes, dynamics, what do you mean by that?

CHRIS

20:13 So, they're still going to enter their time, and we're putting the cart before the horse a little bit where I'll have to show you, what I mean?

--- *Invoicing* ---

CHRIS

20:21 Specifically, they're still going to have to enter their time to tell you. I was here for two hours. I was here for six hours, whatever it is that they're going to enter. So they still have to enter that. What I mean by that, is when you get to an invoice stage or an invoice status, and so, let me rewind a little bit.

CHRIS

20:40 We will also build a time card out for each individual guy on a weekly basis with an approval process that he, once he approves management approves, we can submit into an excel or CSV file and you can take to your payroll provider. But what I mean by that, is essentially, we're going to get to a pro forma invoice at the end of a ticket cycle, job cycle service call, whatever it is.

--- Invoicing ---

CHRIS

21:02 And that pro forma invoice is going to have to be manually brought into GP, and that's through clicking that button that I was talking about Pete.

PETER

21:11 Okay.

PETER

21:11 Okay.

PETER

21:13 I got you.

CHRIS

21:16 So, and what gives you?

PETER

21:18 Okay. Your process, what accounting are you gonna walk us through how it implements into one of these accounting packages or no?

--- Customer engagement ---

CHRIS

21:27 I am not.

PETER

21:28 Okay.

CHRIS

21:29 I am not right. So, so I am all of, the front office management side of the business?

PETER

21:37 Okay.

PETER

21:37 Got it.

PETER

21:38 All right.

CHRIS

21:39 So obviously we're going to have to help control some costs, but we also are trying to help grow some of your quality revenue, sell you guys more service agreements, more projects and help grow some of that customer loyalty.

--- Type of work ---

CHRIS

21:52 So, so here's some of the things that we do. So we're going to handle all of your office coordination. So all of your scheduling dispatching, we use the terminology of jobs, work orders, tickets, projects, parts tracking, time tracking... right? We're going to help all of your scheduling dispatching.

--- Type of work ends ---

CHRIS

22:10 We're going to manage all of your preventative maintenance schedules cycles, right? With a scheduling window on all of those things, throw all those things up on a map and allow you guys to kinda drag and drop some of that scheduling aspect of things... giving your technicians an app out in the field where they're going to enter in all of their stuff that they're supposed to be doing before after picking sure their labor items, whatever parts and widgets that they're using, add in all the comments, handle all of the tasking, PM, checklist, install checklist.

--- Customer engagement ---

CHRIS

22:41 The other thing that we do is try to get some customer engagement happening for you guys in a digital format. So if you wanna, if you want to give your customers access to a portal where they can log in and see locations past jobs, upcoming jobs, they can, even if you guys choose to invoice out of service rate, they can even go in, and capture an invoice from, the portal and pay that invoice.

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

CHRIS

23:05 They can go get their quotes from that portal and approve their quotes as well. We'll also send what we call a service link which is basically a job summary report that's going to have all, the parts and widgets that we use with the pictures and our tasking sheets and everything like that.

--- *Quoting* ---

PETER

23:20 As far as quotes. So obviously there would be a customer portal for that, but let's say we want to go into a customer, we're able to track every quote that, that's ever been sent there. And then as far as the technicians in the field, are they able to see the quotes that have been sent?

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

PETER

23:38 Just so it's not like they're redoing everything that's already been done once before, or they can simply remind the customer when they're on site?

CHRIS

23:44 Yeah. So the technicians can go see the quotes, but typically the technicians are going to be tracking the deficiencies and they'll have visibility of the deficiencies, that are tracked.

--- *Deficiencies* ---

CHRIS

23:54 So we go through a deficiency status. First, our big workflow is deficiency quote back to the office quote gets sent out, and then the customer can view it. The, the technician then would have visibility of the deficiency and whether it was new, verified out for quote or fixed.

PETER

24:11 Yeah. And they'll...

CHRIS

24:12 The broken piece of equipment that way.

PETER

24:14 I...

CHRIS

24:16 Understand... that we do have the capability for technicians to create those quotes out in the field and they can see that most of our customers do that from an

office management side especially because how fast we can turn those quotes out and we can put templates on it.

--- *Pricing* ---

CHRIS

24:32 And I'll walk you through this as to why that makes sense because your technicians are expensive. They're probably your most expensive resource, right? You can get somebody in the office trained to do quotes that are 20,000 dollars and less on a turn and burn rate especially because the margins are so great and you can keep the technicians busy.

--- *Pricing ends* ---

PETER

24:49 Yeah.

CHRIS

24:50 Versus them, trying to call all the different warehouses and find parts and pricing for all that kind of stuff. It's like, no, just tell me what you need and get onto the next job. I'll go do that.

PETER

24:59 Right.

CHRIS

25:02 So, we're going to help with some of your service and project operations.

--- *Type of work* ---

CHRIS

25:05 So we do some project management. I would say if you guys are into big stuff with the Aia billing, we're not gonna do if you got a crew at 10 guys out on a specific job for nine months every single day that's not our platform but, the swap out the retrofit, the quick project stuff that's three months and less. We'll we'll be able to handle all that project management stuff for you.

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

PETER

25:32 Okay.

CHRIS

25:34 And we'll give you guys, you know, your budget, we'll give you.

PETER

25:38 Basically, this is showing right here on the screen is just...

CHRIS

25:42 You...

PETER

25:42 Are doing the health of the job as we're going.

CHRIS

25:45 Yep. We'll give you the health of the job. What your budget is, how much cost you guys have occurred? Were Progress billing will allow you guys, you know, you can see where 48 percent complete based off of what was being consumed. We'll allow you guys to run all those reports to show me all my whip reports.

CHRIS

26:04 So, there's an example of, some reporting aspect that we'll have, right?

--- Implementation and ongoing support ---

CHRIS

26:09 So we can also do revenue by work order type revenue by months. So all those different data points we punch into a Redshift data warehouse. The other side there, is we use a tool called quick site. If you guys have a BI tool that you prefer PowerBI, Domo, for example, we can also pump that data into those reporting tools.

--- Implementation and ongoing support ends ---

PETER

26:32 Yeah, we just started using PowerBI a little bit here.

CHRIS

26:35 Perfect.

CHRIS

26:40 Yep. So we can pump that into PowerBI, and based off of your KPI'S those things, we can give you all sorts of reports through that.

PETER

26:47 Great.

PETER

26:51 Awesome.

CHRIS

26:52 So...

PETER

26:53 The...

CHRIS

26:54 Other piece to service trade on, the forward side is we have a product that's called Northboundary, which is going to help all of your sales proposal side of the business. So... we have a database behind the scenes essentially if you will, that's being up capped with. Hey, and this is what I was explaining in the beginning of, I got to swap out a Ram unit here's. All the stuff that you typically need to swap out a Ram unit, right?

--- Recurring maintenance ---

CHRIS

27:19 With all of your guys pricing roles. And then all of your markup roles, and that quote will get sent out to the customer. It's going to handle a lot of your preventative maintenance proposals as well because we know if you have a, you know, a five ton carrier unit, you're going to need two filters and a semi annual visit and expect four hours per visit based off of the model and Ciro number that you guys pick.

--- Quoting ---

CHRIS

27:41 And then it's going to have some CRM functionality as well. So, if you have sales guys that are tracking and tracking their quotes and managing their quotes from a management standpoint, you guys will be able to see what does my pipeline look like? Who who's quoting the most? Where does all that stand?

--- Quoting ends ---

CHRIS

28:00 Any questions so far?

PETER

28:07 Yeah.

CHRIS

28:10 All right. So you should still be able to see my screen. So let's just kind of walkthrough the different tabs, of service trade and see, what kinds of conversations we stir up. So wanna keep this open for him. So if something pops up, let me know.

--- Tech On-site ---

CHRIS

28:25 I would, I do want to try to get through a work order so you can kinda see what that looks like.

PETER

28:29 Yeah, for sure.

CHRIS

28:31 So, obviously, we will Geo tag every time a tech clocks in and out, right? So we know where your guys are not a GPS tracking system. So I can't tell you how fast they're taking turns or how hard they're breaking. But every time they ping the app, will Geo tag where they are, and this?

PETER

28:46 Often does the... does it like every 10 minutes refresh send data back and forth? Is it as soon as somebody takes something in, it's already refreshing how?

--- Access to information ---

CHRIS

28:58 It's so, so as soon as something is typed in, it's being sent out, how often they have to refresh the app? I don't know.

PETER

29:07 Yeah. So the, currently, what right now is there's a refresh button on our tablets essentially they call it sync, right? So, mobile tech is you right out the work order they'll put their times in and they have to hit the sync button in order to transfer data from their tablet to dynamics in the office?

--- Access to information ends ---

CHRIS

29:28 No instantaneous.

PETER

29:30 Okay.

CHRIS

29:32 So soon and I'll show you kind of what that looks like here in a second. But as soon as they click four hours of labor, it's instantaneous.

PETER

29:41 Well, okay.

CHRIS

29:43 Instantaneous getting back to service trade not GP.

PETER

29:46 Right.

PETER

29:47 Yeah.

PETER

29:48 Yeah, that's basically correct.

CHRIS

29:50 Cool. So, so here's just a quick snippet of kind of what's going on. We're going to track a daily schedule. And I'm gonna give you multiple ways that you guys can see a daily schedule. Pete we kinda talked about that, that's going to be dynamic and that is going to be changing. But what we have in ServiceTrade, the point I want to show you here is what we have is considered catch all buckets. So I'm gonna track all of our overdue stuff. So PMS that are past due quote jobs that are passed do will never let you guys miss that opportunity to capture some revenue, all my upcoming stuff. So all of my appointments do in the next two weeks, right? So another catch all bucket for some visibility of what we have to do in terms of labor planning jobs would be marked complete.

--- Invoicing ---

CHRIS

30:32 So this is where technician is done. He said he's done everything that he's supposed to do. Somebody from the office has to review this and make sure that it's actually correct, of which we kick it down to the completed jobs to be invoiced. This is where we get to a pro forma invoice and I'll show you what it looks like from the service trade side, but that's typically where if you invoice out of service trade, great.

--- Accounting integrations ---

CHRIS

30:52 I'll show you why it's cool. If not you kick it over to the accounting system and the accounting system takes it from there.

PETER

30:58 No.

PETER

30:58 It's what we do now.

PETER

30:59 Yeah. I had a couple of questions again, the first one, I forgot. The second one as far as, you know, currently right now we're pretty heavy on paper too.

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

PETER

31:12 At this point. We still have... files and I would keep the original service support. Any job parts that were purchased or anything like that. How does that all flow? I mean, so I see completed invoices, ready to look what is, what I mean? If you get a paper invoice, I guess it would have to be scanned and entered into each job, correct?

--- Recurring maintenance ---

CHRIS

31:42 So let's go through the data model. So you can kinda see what that's gonna look like. So we have the concept of a Bill two underneath that you're Bill to is going to be your location that you're supposed to work at. So whether you're working at walgreens, CVS, whole foods, whatever it is, you might have 75 locations for one built.

PETER

32:00 Sure.

CHRIS

32:01 Each location we're going to track what we call services. Okay? So services are going to be all of your quoted work, whether they be annual inspections, quarterly PMS, one time service calls. These are going to be all of your services because they have not been completed yet. Okay? And so let me just edit this one so you can see what this looks like. We have the concept of templates which we can dive down deeper. But quarterly PM templates, 95 things here's. The piece of equipment that this specific services tied to. So I know what this reoccurring PM is tied to our contract is going to handle all of our markup rules as well as an expiration, date. So we'll know how long each piece of equipment is under contract for as well as location. This is just a big text box. Okay? So we can associate preferred text with a specific service. So I know every time I turn this thing into a job, it's automatically going to flow to Chris kid well, or you leave it blank because you need some flexibility for scheduling estimated price. We think it's going to cost us 500 bucks. It's gonna take an estimated duration of five hours that schedule.

PETER

33:14 That piece of equipment, correct?

CHRIS

33:16 Yeah. Yep. How long is this scheduling window? It's gotta be a specific day. We have to do it on the first Monday of every month. It's gotta be the first, the fifth of every month. Whatever that is. We just got to do it in March. Doesn't matter when

it's just gotta be done in March or we can go custom. What does it do? Obviously, the ones do in March, we'll do 2024. How often should this occur? Whether it be monthly, annually? If we go monthly, repeat every month, I could go repeat every three months. So that's a quarterly service. Every time I turn this service here's, an item database that we guys you guys would have inside a service trade that's going to handle all of your parts widgets, items that you use. So once I turn this into a job, all of these things will automatically flow to that job.

--- Recurring maintenance ends ---

PETER

34:05 So, let me ask you this. Now we go to one of our larger customers that has 300 pieces of equipment on it... we have to go through each one of those and generate essentially a task driven it like just kinda itemize like you did there. How does that work?

--- Assets ---

CHRIS

34:26 Yeah. So no, what you would do is, so hang on. I'm gonna answer that question.

PETER

34:32 All over the...

PETER

34:33 Place. Pull me back. It's totally Frida.

CHRIS

34:34 Yeah, because, I wanna hit the next tab down which is going to be jobs...

PETER

34:40 And I'm...

CHRIS

34:40 Gonna come right back, but every location we're obviously going to track every single job and all of these are hyperlinks directly to that specific work order.

--- Assets ends ---

CHRIS

34:49 We call them jobs, work orders, tickets as well as all of these are going to be tied directly to the invoice with the total invoice them out. So we're gonna tell you the different types of jobs when they've been scheduled, et cetera. So to answer your question... right here, we have a building.

CHRIS

35:08 So you would essentially create a reoccurring service for the building. And then you would have a tasking sheet for the 300 pieces of equipment that you guys have to go service for that specific location. So that is one way to do that. We, we see that more on the fire life safety side because they might have to go Inspect every single strobe in a building, they might have a 1,000 of them.

--- Assets ends ---

PETER

35:28 Sure.

PETER

35:29 But all that stuff initially, it has to get entered manually or can it, like if we were to switch to service trade, can it be pulled from where from the information we already have?

CHRIS

35:39 I'm fairly certain we can get that out of wensoft?

PETER

35:43 Okay.

CHRIS

35:44 So...

PETER

35:45 I mean, you got to think about it too.

--- Assets ---

PETER

35:46 Even we went there's. Still a lot of updating as far as like tasking in the equipment and all that stuff that we have to be, that has to be done there's a lot in there, but a lot needs to be.

PETER

35:57 All right. Because once we do that training, I'm gonna signing it to just one piece of equipment exactly. Yeah.

--- ST app contracts and pricing ---

CHRIS

36:06 Yeah. So, so, the hard part or, and not that it's hard is, and I'll show you what I'm talking about in a second. If you need to apply cost to each specific piece of equipment, you have to set each piece of equipment up on its own service. If you just need to apply cost to a location, it doesn't matter because you don't need to know if you have, you know, five hours labor on this art, you and two hours labor on that to you, then you just default to the building.

--- Assets ---

PETER

36:32 That, and that would be fine with us. We don't group, it specifically. Yeah, we give them an estimate of what we think it would take to do that piece of equipment. But as long as they do it within that allotted amount of time for the building that's fine.

CHRIS

36:47 Yep. And so.

PETER

36:49 I...

CHRIS

36:49 Think that's fine. I jumped over to an asset page because I want to show you this specific conversation that we're kind of having. This is, hey, this is how all of these services are tied back to this piece of equipment. So as you set that up, all of these would be tied back to this piece of equipment. And so what you're just doing, a, you know, a service call, obviously that would be on that specific piece of equipment with serialized. But if you just need that mass preventative maintenance thing, they would not be tied to a piece of equipment. But each piece of equipment will also have a, every job that's been associated to it. And again, we can even go to the invoice. So all that will live under the piece of equipment here's, the deficiency on each piece of equipment. Any quotes. If we had some quotes, they would be here, sub assets that's the concept of parent child assets here's, our attachments, right? So these can be pictures of whatever you guys want. That you can do, wiring diagrams, piping diagrams for the pieces of equipment, whatever PDF you want. You can associate with all the pieces of equipment as well. Comments, self explanatory... back on this location, we'll check every deficiency that's been captured on a location as well as every single quote on a location page.

--- Recurring maintenance ---

CHRIS

38:09 Like I was saying, our contracts where we're going to handle all of your contracts. So we know when each contracts can expire too. So if you guys need to go renew that P. M, you'll be able to run reports on all the contracts. Show me every contract that expires this, month, next year, whatever that is, comments can be scheduling notes, technician notes, they can be internal or external comments.

CHRIS

38:29 And then we can also do attachments on a location page. So that's... pictures of the building, blueprints, wiring, diagrams of the building, whatever you guys wanna do there basically a little bit of a file management system.

PETER

38:42 So, this is so all of this that you just drill down and is specific to that particular customer at that location?

--- *Recurring maintenance* ---

CHRIS

38:51 Yes, everything there is at that location.

PETER

38:55 Okay. And.

CHRIS

38:58 Right. So the parent companies page will look like this, right? It's not going to have that much stuff because it's really just a Bill to.

PETER

39:06 The Bill to, right?

CHRIS

39:07 Right? But underneath the Bill to, will be our location of capital one arena. And that's where we have all those goodies that we just talked about because that's where the work is actually being performed.

PETER

39:18 Got you.

CHRIS

39:21 So, I just grab the PM job. I'm gonna come back to this. I want to go through some of the scheduling and dispatching side. Again, this is new.

--- *Recurring maintenance ends* ---

CHRIS

39:30 So as this is being rolled out, I think they're supposed to have a big launch tonight at midnight with a whole bunch of more features and bells and whistles. So bear with me as I stumble through this because I haven't played with it, but.

PETER

39:43 This is the new one or this is the old one?

CHRIS

39:45 This is the new one?

PETER

39:47 Okay.

CHRIS

39:48 Yeah, old one looks like this... right? So a little bit more blocky. The, the UI is much more user friendly on the new one and it's got more.

CHRIS

40:05 More more features to it. So, one of the big things that we had based off of customer feedback. And again, one of the reasons why we're only in the commercial space is because it's very similar workflows is this block of stuff that we have, we're just supposed to do, right? So this is just a queue of, hey, these things are important. I need to get them done ASAP and these will just live in this queue of things to do.

--- Dispatch ---

CHRIS

40:30 But we're also going to track your available jobs too as well, right? And we can filter out how we want to sort that, whether they're due soonest or latest. We can edit the filters that we wanna see. So I just want to see available jobs based off of service lines, right? Whether they'd be your arctic air, whatever this is. And this is a demo account. So you would have all this stuff, right? Hey, I just want to see service calls... right? So just show me my service call. So I can just see the service calls, right? And then this is also all just drag and drop. So I can just say, hey, Adam, get to that H and M job at one a. M... and get to that Nancy Cox job at 11... right? So I can just kinda drag and drop.

PETER

41:19 Say all service calls that includes your preventative maintenance.

PETER

41:24 Ending on the filter that you put in?

CHRIS

41:26 Yeah, you can choose the filter.

PETER

41:29 Okay.

CHRIS

41:30 Right. So if I just wanted to see everything, you can see all the different job types... right? If I wanted to see all my service lines. So if it was the fall, I just wanted to see boiler stuff. I can... if you remember how we can assign technicians those services. So if I just wanna see the stuff that Chris has to go through this month and I can start to build out his schedule, I can... we can also filter out different offices. So if you had a heating office versus cooling office versus plumbing versus electrical... we can also break it down in the regions as well.

--- Dispatch ends ---

CHRIS

42:06 So being from Maryland, I know DC gets broken out in northeast northwest, southeast, southwest, but you can break out different regions.

CHRIS

42:18 And then again, this would all be drag and drop as you guys can break out those filters and do what you need to do there.

PETER

42:27 We work. I mean, I'm sure you said you guys are only working with commercial?

--- Dispatch ---

CHRIS

42:33 Yes.

PETER

42:34 I didn't know that... with us, it's usually four and eight hour jobs for the most part. So as far as looking at like a proactive schedule, this is on like the hourly basis, but it, what's like, the bigger calendar look like. And... there you go.

CHRIS

42:57 Yep. So we can kinda do a weekly view... and see whatever what each person swimming looks like. And again, I don't have a whole bunch of stuff here, but we can also do monthly view.

CHRIS

43:16 So I can kinda see what each guy's view is gonna look like based off of a monthly view as well.

PETER

43:23 Okay.

CHRIS

43:28 And we can kinda move those things around and probably just screwed with Clint demo, but hopefully you figure it out. So again, what I show you now is probably going to change tomorrow because I know we got a whole bunch of new stuff coming up. This is also where we can come in here and add a job right? Where I can come in here and say Fenway is call on us. Okay? We can do a service. We can say Fenway actually let's do Chris kid well right away... because we know Chris kid well, handles all Fenway. What time is it? 147? I can say Chris are going to get there at two o'clock... Fenway. We know it's going to be on the, whatever assets we have service. We can just say this gonna be on some hvac stuff.

CHRIS

44:24 Don't fix not to exceed 750 bucks... right? That's now on Christmas schedule today. And if we had, if we did not put that on Christmas schedule, that would fall in this bucket right here. And then whatever we don't get done today, we can just bulk move to.

--- *Access to information* ---

PETER

44:45 Tomorrow.

PETER

44:50 Okay. And so the tablet that they'd be using, how many appointments can they say at a time?

CHRIS

44:57 Yeah, great question. So let's try to get through a work order. So, hey, I just grab this capital one arena because that's typically the location that I demo... but you should be able to see, my tablet view on the left side of the screen. So this is any android or iOS device we're compatible with. So you're looking at my iPhone right now, I can see unscheduled jobs. I can see completed jobs, right? So I have stuff going all the way back to 2022 because I never clean my stuff out because it's a demo account.

--- *Dispatch* ---

CHRIS

45:30 But here would be like a list of all the jobs that Chris never actually does because it's a demo, but I can just come up to the top and filter today and I...

PETER

45:44 So, okay. I like that. So currently, what happens with us? It's like if we wanna be a little bit more proactive, I'll go in there. We'll schedule for Bob Benson and he'll get two appointments for today. I'll get three for tomorrow, one for the following day and we start building it out. Now, a lot of these guys, it's like they get overwhelmed and they see more than one appointment or the appointments for the next five weeks

and they can't take it because they're seeing it on their tablet. Is there a way to see? I guess you kinda pointed it out there just to be able to flush it out. They see only what's on their current radar.

CHRIS

46:22 Yes, there it is. There's the button. So I want to build out a technician schedule, but I don't want him to see it.

PETER

46:30 Yep. Exactly.

CHRIS

46:32 So, right here, it's like, all right. So now, as I build out, if you can imagine, I got 10 jobs here now that I'm good. I'm gonna just say, all right, hey, Chris. You're ready for that Fenway job? I'm gonna release it. So now, so you can build out a guy's route schedule for a week basis month basis and he can't see it. And when he's ready for the next one, then you just release?

--- Access to information ---

PETER

46:50 Awesome. Yeah.

PETER

46:53 Now, it then comes off of that block up top?

CHRIS

46:57 Correct. So, from a technician standpoint down here at the bottom, I've got three clock features.

PETER

47:06 What?

CHRIS

47:07 Is this?

PETER

47:07 We're looking at here, is this kind of what the mobile device would look like?

CHRIS

47:11 Yup. This is the mobile side.

--- Assets ---

PETER

47:13 Okay.

CHRIS

47:14 Yeah. So, hey, I'm gonna go ahead and clock in on site. We're now here, it looks like I have three services to do, right? So I gotta work on this chiller. I gotta work on this boiler, and we got this chiller over at the parking garage technician.

--- Tech On-site ---

CHRIS

47:33 These are all different tiles, right? So here's the next tile in comments. Don't send Chris. They don't like him... too late. I'm already here. This job is done though. So I can just do talk to text.

PETER

47:51 And now...

PETER

47:51 That's just something.

PETER

47:52 That's internal text between the office and the tech.

--- Tech On-site ends ---

CHRIS

47:57 Correct. You can make that. If I click that edit button, I could make it visible to everybody, but right now, it's fault because I want the office to review it in case Chris drops a custom.

PETER

48:08 Yeah.

CHRIS

48:09 Right. I could write F word.

PETER

48:12 Yeah.

CHRIS

48:13 Right. And I want the office to review that. So I don't want that actually to be customer facing. So the other AI thing that we are doing now is we're going to write

to use a I, to scrub whatever the technician says and put it in a format that is... customer friendly. So that they can understand really what the technician is doing.

PETER

48:36 Got you.

CHRIS

48:37 So, the next tile over is going to be deficiencies. This is where, from the technician standpoint, I can see all open deficiencies. I can see fixed efficiencies. So we were kinda talking about this from a technician view, I can come in here and see, hey, back on 1,115. It looks like this deficiency was found there's. Matt hetrix who captured this picture back on November fifteenth on that piece of equipment. So technicians will have a full view of all the deficiencies that have been captured on that location.

PETER

49:06 Got you.

CHRIS

49:08 We can go ahead and add a deficiency, right?

PETER

49:10 To a deficiency the same as a quote that's totally separate field.

CHRIS

49:15 Separate.

PETER

49:16 Okay.

CHRIS

49:17 But quotes this way are based off of these deficiencies. So, what I mean by that, is I'm gonna say, hey, this thing's, got a broken compressor... right? This is a broken compressor. We can do audio. We can do video, right? So I can say, Pete, this thing's gonna take me six hours to fix. I'm gonna need a helper and a 20 foot ladder. Arco has the parts in the stock call them to get pricing.

PETER

49:48 Very cool.

CHRIS

49:52 We're gonna click save, right? I could do, I'll do one more picture just for fun.

PETER

49:57 So, at this point, the customer seeing nothing, this is just internal to the office.

CHRIS

50:02 Correct.

PETER

50:03 Well, now, it's it is visible.

CHRIS

50:06 You...

PETER

50:07 Got the slide button there?

PETER

50:08 Yep.

CHRIS

50:09 Yep. So, so technically speaking, I believe they can go, no, they cannot yet. It is not visible to the customer yet. So this Java has to be complete before it's gonna.

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

PETER

50:19 So once they complete it, if that's checked, then the customer will be able to see it.

CHRIS

50:25 Correct. So, let's do it on this chiller. I'm gonna say that this is new. So, Peter, another big workflow is some of the smaller stuff that, hey, this is, I gotta put a new connection pump on this thing.

--- Deficiencies ---

CHRIS

50:39 It's gonna cost 150 bucks. Yeah, just go ahead and do it. I still want to capture the deficiency and I'll show you where I'll add the parts here in a second. Still want to capture that. So we report on it... and I just say that, hey, we went ahead and fixed it, but I'm gonna leave, this is new because this is a bigger project. I want to show you how we, we're gonna quote this status is going to be new, right? And let's just say we got to fix a sap.

CHRIS

51:05 So that's just capturing a deficiency out in the field. So right now the office is going to get notified, Chris kid. Well, just found a deficiency. The sales rep, whoever is managing that location is going to get notified of that deficiency... attachments. So this is where I can just come in here and go ahead and add my before pictures after pictures... whatever the tech needs to add pictures of out in the field, it doesn't matter, right?

--- *Assets* ---

CHRIS

51:31 So whether it's pictures of the equipment, him working on it, they can do video of it all et cetera. Contacts is pretty self explanatory... paperwork. This is where we're...

PETER

51:43 On contacts real quick. Currently, we're running through a little bit of an issue. Once the service is completed, work orders filled out.

--- *Assets ends* ---

PETER

51:55 Everything's good to go. You go to submit. The technician gets an e-mail sent to him of his server support, and then we're making him take that and send it to the customer. The reason it's being done with that is because they were only able to put one e-mail address in there where that report is sent to. So that's created a huge workload on us. Especially, we got customers. Now pretty big counts. It's like we want six people getting that search board at the end of the service. Next morning. We got to remember, come in something to it's. It's a huge pain to ask. Wait, is this something you guys are doing differently?

CHRIS

52:35 You can have as many contacts as you want.

PETER

52:38 To a location?

CHRIS

52:39 Yep.

PETER

52:41 And then you have to individually, click on who should get it each time or automatically get sent to those people.

CHRIS

52:47 Have to tell it where it needs to go. So if I have to send it out to six different people, I have to tell it that it has to go to six people. You can have as many people on site as you want.

--- *Forms* ---

PETER

52:58 Okay.

CHRIS

53:04 I'll set up another meeting to go through our tasking, but paperwork is going to be where our next section is and that's where we'll go through all of our tasking side of things. So, so we're going to run out of time here. But, but we'll go through tasking, I'll set up another call to go through that.

--- *Recurring maintenance* ---

CHRIS

53:18 The next tile is going to be job items. So because I had some reoccurring services already set up for this specific job, these things automatically populate. And this is where I can just come in here and tell, you know, hey, yep, I use my 10 widgets, like I'm supposed to.

--- *Recurring maintenance ends* ---

CHRIS

53:33 I use my labor. I used all my cable. I'm not gonna go through all these, right? But as we use those things, you can see they'll obviously change and that's all on my chiller, maintenance stuff on my, you know, I can go through, the manhole gaskets that we had to use et cetera.

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

CHRIS

53:51 Now, let's just say that this was a TAM and I don't have anything on here. I can come in here and I can say, hey, I got some labor here. We're gonna put it on our hvac labor and I'm gonna tell you I got four hours here. So obviously we're going to block out the cost because we don't want the guys out in the field to see the cost.

--- *Tech time tracking* ---

CHRIS

54:09 But we do, we will source this to the technician. Okay? So that's Chris kid. Well, basically building out his time card at the end of the week.

CHRIS

54:22 Right? So I can come in here and I can add, you know, let's just go in here and let's just say that I need to tell you that I had to use a widget.

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

CHRIS

54:32 Let's just say we got six of them. I'm gonna say that we had to use that widget on that boiler service. We can also source where these widgets are coming from. So for, if I'm grabbing them from a warehouse, I got it off a Danish truck. If I had to go to a parts vendor, right?

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

CHRIS

54:48 I can tell you that we got it from acme... if I had a po number there status too. So I didn't order it. I ordered it. It's already been received.

CHRIS

55:02 So there's me just adding a widget to that specific ticket work order so that you guys can track cost behind the scenes.

--- *Tech time tracking* ---

PETER

55:11 But for hours that can all be entered daily, correct?

CHRIS

55:16 What do you mean? So?

PETER

55:18 So, like right now, we do daily paperwork and the guys have to put in their time like as you mentioned, so I can build my hours for the week, but we have them sync back to the office daily because wanna get either for payroll purposes or just get the billing out. You don't wanna wait and do it at the end of the week.

CHRIS

55:39 Yep. So that, that's already done, he doesn't have to do anything. The technician does not have to do anything regarding his labor. Now that he told you that, that's got five hours on it. If I scroll down back here in the back office, it'll populate in a second of his labor, but he's already done with the labor. He doesn't have to go enter it again and tell you he had four hours on this specific job that's already done.

PETER

56:01 Because he's starting his time there on this.

CHRIS

56:05 Yeah.

PETER

56:06 Because I saw before you said four hours, you added four hours. So, I was just wondering if that's... like did you after that or is it just based off of one clock in clock out?

CHRIS

56:20 He manually enters that, and that's the reason is majority of our customers do not Bill based off of clock in clock out features.

PETER

56:31 Right.

PETER

56:32 Right, right, right.

CHRIS

56:33 So, he, he's gonna say, hey, this was supposed to, I just was imagining some things and just chose four hours, pick an hour, pick six hours, pick eight hours, four hours, eight hour blocks is typically what most of our folks work on, which is why I just said, hey, I got one Java four hours.

--- *Assets* ---

PETER

56:48 Gotcha.

CHRIS

56:51 The next tile over is going to be assets. So this is where I can come in here and see, my boiler because I'm working on this, I can get a full service history of everything that's ever been done. I could see back here on April 20 seventh. Chris kid. Well, was here. There's his inspection checklist tasking sheets. We'll go through. We'll go through that workflow, but you can see that there's going to be a history there as well that the technicians would have all that visibility. I can see every comment et cetera, on that piece of equipment. I can see any related assets. And I can see every single piece of equipment at a specific location.

PETER

57:28 Now, what if they had to out on a service ticket, add a piece of equipment? Like let's say we've never done work on that piece of equipment at that location and they have to add it at that time.

CHRIS

_{57:39} Yeah. So I can just come in here and say we got a boiler. It's going to be in the basement, right? We can do number manufacturer, model serial number, install, date, fuel type, etcetera. Now, I just added a boiler to that specific location... and you can also there's also scanning features there as well where they can go ahead and scan the model serial number and populate all of those different fields.

--- Paper process ---

PETER

_{58:07} Real quick. It's kinda going back probably from you mentioned before the, as far as checking paperwork, right? So every morning, we have to review all the paperwork from the guys. They prior to that goes out to that front sheet you're showing us and it is waiting to the invoice. And all those tickets have to kinda be approved. I guess. Is that how that works?

--- Paper process ends ---

CHRIS

_{58:30} Yeah, that's typically how that works.

PETER

_{58:32} Okay.

CHRIS

_{58:34} Yeah. So, so somebody's going to have a bucket, a report however they want to live of. All right, it looks like we had 30 work orders yesterday. Let me start going through them and making sure that they're right? And I'm gonna get to that in one second. Kinda what that's gonna look like.

--- Invoicing ---

PETER

_{58:47} Cool. Now, if we choose to Bill through the accounting side, what happens to those tick? Like if we're not gonna actually invoice from the service side, but through accounting, like we do. Now, what happens with that? All that paperwork? They just close the job and it syncs to the accounting.

--- Dispatch ---

CHRIS

_{59:05} Yep. So you're just basically gonna close the jobs. So you, and jumping the gun again a little bit, I'm gonna get there because essentially, you're just going to go run a report. Show me my last jobs from all yesterday. You're gonna close all them out once they're all closed out.

--- Invoicing ---

CHRIS

59:18 And good to go. If you guys want to invoice out of GP, you then create that bulk report of which it will automatically close all those jobs out and say that they've been to an invoice status meaning that they've sent the GP, and then you'll track your, if they've been paid or not over a GP?

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

PETER

59:34 Okay.

CHRIS

59:36 So, are you guys capturing signatures out in the field?

PETER

59:40 We are, yes.

CHRIS

59:42 Okay. So the next piece here is we're going to go ahead and create a work acknowledgment. And this is where I'm just gonna choose my self. I did not put you in here, Peter. I will put you in here and show you what this looks like. I can create an invoice out in the field. But most people don't specifically for the workflows that you're talking about. I'm just gonna go ahead and review this from the technician standpoint. This is where we turn the tablet around to the customer and we say, hey, dark is our dummy customer, dummy contractor. We're out here to work on this capital one arena, Chris, these are the three different PMS that we had... here's. All the parts and labor that we had to use, all the widgets and parts, and everything else. I know by the way we capture this deficiency today. On the fifteenth... customers, gonna go ahead, confirm and sign. I'm gonna send myself a copy just so that can forward it along to up. But most times we'll turn that off. Chris is gonna go ahead and sign it. He's done technician standpoint. I'm gonna go ahead and clock out. I'm gonna check off that all three of my PMS are done. We're gonna put some guardrails up here for the technician standpoint. You know, hey, did you track your, did you put your before after pictures? Did you make sure to leave your comment? Did you capture all of your deficiencies? Double check your deficiencies? Go ahead and finish clocking out.

--- *Dispatch* ---

CHRIS

1:01:09 I'm now done. So there's the refresh button from the service trade side. If you remember that Fenway job is now, was that other job that I scheduled for myself? I'm going to capture Fenway. I'm clicking directions... and I got a seven hour job drive to Fenway. I'm on my way.

--- *Dispatch ends* ---

PETER

1:01:30 Cool.

CHRIS

1:01:33 So that's the technician side? Any other questions before we jump back into the office?

PETER

1:01:39 I don't think so.

CHRIS

1:01:41 Okay. Do you wanna, do you wanna hit the pause button? Because we're already at the hour mark, I'm good for another 30 25 minutes. If you guys are, or if you want to get 10 more minutes, we can, or we can schedule another call...

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

PETER

1:01:53 Up for you? Let's let's keep going.

CHRIS

1:01:56 Okay. So back here in this job, if you remember, we were on this capital one arena, we're still technically in Progress. But if I refresh this real quick, I would already changed. You can see now that we're completed, I refresh it. We're still technically in Progress because that workflow, we want the office to review this. So just like you were saying, hey, I need to go through my 30 days worth of jobs yesterday or whatever it is. I'm gonna go ahead and review this. So it looks like Chris kid well actually got three of his things done. If for whatever reason, he didn't this would not be green. And you guys could then know that you need to schedule out another PM here. But as I continue to scroll down here's, all the parts and widgets that he used. We can edit this and clean this up in the back office, right?

--- *Pricing* ---

CHRIS

1:02:43 No, Chris, we do eight hour days, not four hour days here. Everything else looks good. We also can see he ordered a widget, why did he do that? If so, we're going to charge the guy 50 bucks, not 999. We'll flag that the standard cost changed, but you guys will have that review process to make sure that that's right?

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

CHRIS

1:03:04 Clock events. So every time he pings the application, we'll Geo tag it. So we'll know he was clocking in and out 45 minutes away. Here's the pieces of equipment that he was working on... here's, the deficiency that, he captured out in the field. And then we can also see comments too, right?

CHRIS

1:03:24 So I can see the comments that Chris put on that specific job et cetera. As well as our attachments. So here's my before and after pictures. Here would be my tasking sheet. We'll go through that tasking sheet on a separate call. But if I had a tasking sheet, that would be here.

--- Tech On-site ---

CHRIS

1:03:41 And then here's my work acknowledgment. So you would review the, that each technician did their tasking sheet the right way as well. So once this all looks good, we open up this deficiency. I'm gonna come to that next, I'm gonna go ahead and complete this job. Okay? And I can go one of two ways. I can immediately create an invoice. But I'm just gonna go ahead and say that this is done. And I'm gonna actually create you real quick Pete for a new contact and I'll show you kind of what the customers are gonna see. We'll call you on site.

CHRIS

1:04:24 I think that's a, right? E-mail, right?

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

PETER

1:04:25 MSCMS.

CHRIS

1:04:33 Awesome. So the next thing that we do here is we're gonna go ahead and send out what we call the service. Like this is just, our work order review. If you will all these green switches or toggle switches so we can pick and choose what we want to show to the customer... right?

--- Tech On-site ---

CHRIS

1:04:47 I'm gonna turn that audio off that wasn't meant for the customer. And now if I scroll down there, you are as my primary contact, right? I can put a note... thank you for your business. You now have that. So the next stage here is we go ahead and create an invoice of this job.

--- Tech time tracking ---

CHRIS

1:05:11 All that looks good. Again, one more time. I can review this and this is where we start to pull our hands out of the equation. Meaning I now have this into an

invoice status. Obviously, we're going to track all of your margins in your job costing and we'll be able to report on all those different things here's. All of our stuff that we use our labor. We changed it to eight hours. So when Chris goes to review, is time card will be eight hours on a Monday for this specific job. But the point that we want to show you here is if you guys choose to invoice out of service trade... the customers are gonna get similar to the service link which you just have, this would obviously be your guys logo.

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

CHRIS

1:05:49 And I didn't talk to you through this, but you can dictate how you build these invoices out, meaning, how the customer facing. So if I just wanted to do a TAM, if I wanted to break it out by service, if I wanted to break it out by labor versus material, or if you just want to lump summit, you can dictate how all that is shown to the customer. The cool thing here is that blue link is gonna take the customer back to the service link with all of my appointment services that's in your inbox. You can kinda review that after this call and then a pay now and then customers in the states can go ahead and pay with a credit card or pay with AC. H.

--- Invoicing ---

CHRIS

1:06:28 If you do not invoice out of service trade, this is essentially the place that we get to. And this is essentially a pro forma invoice, of which you guys would then run that report and show me all invoices from X, date to date. And we put them into a format that's importable by GP... right?

--- Accounting ---

CHRIS

1:06:47 So, for example, I would go to invoices, show me all my invoices that I need to import into GP. I would export to a spreadsheet, and then there'd be a button there that would import integrate planes. So that's what I was saying manual. Yes. Is it hard?

--- Invoicing ---

CHRIS

1:07:06 Not really, but do you have to click a button? Yes... most, so about 60 percent of our customers do not have service trade wired to their accounting system. And a lot of people like that review process because you can change and do whatever you need to do before it's actually going to hit a ledger.

--- Deficiencies ---

CHRIS

1:07:33 So the next workflow that I was gonna go is, the quoting from the office side. So this was that deficiency that we captured out in the field. I can see a deficiency history, any related deficiencies here's. All of the quotes. Obviously nothing there yet. But what I want to show you is the quoting process is we're going to go ahead and create a quote expiration date, end of the month.

--- Quote templates ---

CHRIS

1:07:56 Let's go ahead and create this quote. I had touched on templates in the beginning part. So, so this is what the templates are gonna look like. We have these concept of templates and whether they be for quotes or reoccurring services, what I do compress it, right? So here's a compressor template. This is typically what we have to do to replace a compressor. And obviously these are just one off. So I can come in here and I can say, hey, Chris said six hours of labor, not three and I need a helper in here... though, I'm on the hvac line, right?

--- ST app contracts and pricing ---

CHRIS

1:08:30 And I can also say he's got a special blue park. So something that's not in, the item database. And this thing's gonna cost 500 bucks. And you can see how it'll automatically apply the markup rules based off of the contract that they're associated with. But let's just build them 10,000 bucks because we need to get our margins, right?

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

CHRIS

1:08:51 Like I was saying, I can dictate how I want to show this to the customer, same thing on an invoice status, right? So if it was a TAM job, grand total et cetera. Right? So I can go ahead and click save. I'll send this to you so you can see what that looks like. We turn the audio off. You now have that in your inbox. But essentially what that's gonna look like is obviously this is going to be your guys logo with a big green approved button here or request changes, description of work that is all going to be your verbiage. Again, these would all be your items that you guys have in the system. And then these will be all the pictures that the technician took out in the field. Customers just gonna go ahead and click that approve button. And if you have access, you can go ahead and prove it if not a big deal, but you would click approve.

--- ST app contracts and pricing ---

CHRIS

1:09:47 I can't do it because this is just a preview. But with, if you click approve, we then turn that into a job and we can either add it to an existing job or create a new job from it. And then if it was a project, we then, associate a budget start to build out our project.

--- Quoting ---

CHRIS

1:10:06 We're going to track a full history of that quote as well, right? So I can see each technician adding all the different pictures. I can see that we actually created a draft. This quote was actually emailed. I can even see that you viewed this quote. Once you click approved, we'll even track that you approved it. We'll even track the IP address behind the scenes. So we know where those quotes live.

--- Quote templates ---

CHRIS

1:10:29 And you can see that's now been approved. We can go ahead and create a job from that quote or add it to an existing job. So if, Chris will still out there, he's got to be back out there tomorrow for whatever reason, we can go ahead and add that to that job or we can just create a new job from that quote.

--- Quoting ---

CHRIS

1:10:49 Okay. Questions... that don't make sense. So touch on our quoting reporting. So we'll also give you guys, you know, more reports around quoting. So based off of sales people, when does each quote expire the status of each quote, right? So show me all quotes that have been submitted and viewed but not approved, that are going to expire after November first or before November first, whatever that is, right? So you guys will be able to run all of these reports around quotes. You can also bulk send these out to the customer. So just clicking that button, we'll automatically bring every single quote back up to the, your customers top of their inbox.

PETER

1:11:35 Got it.

CHRIS

1:11:38 Based on all that. So the, so huge revenue generation piece for us in terms of tracking that, managing that side of it, right? So I can see all quotes created during a certain month.

PETER

1:11:48 Yeah, we, I mean we have it pretty often. I mean just currently customers revisiting quotes and send me that.

--- Customer engagement ---

PETER

1:11:56 Again, it's nice to just be able to have that just resend it or this is, you didn't show us the portal side of it yet, right?

CHRIS

Have not gotten to the portal yet... have not got into the portal yet. The next tab I was gonna show you is deficiencies and much similar to the quotes.

--- Deficiencies ---

CHRIS

1:12:13 We're going to track all the deficiencies, right? So show me all quote deficiencies that are new, verified or fixed. So, so that's part of the reason why most efficiency workflow comes back to the office is because it can be that quick where the technicians, are a little bit more fumbling on an iPad to create a quote.

--- Quoting ---

CHRIS

1:12:32 It's easier to manage from a desktop with a computer. But we'll also track all the deficiencies as well. The status of show me all deficiencies that have just been fixed, deficiencies that are out for quote. Just so just now. So, so somebody's job would be just to live here and find all these new deficiencies and turn them into quotes... right?

--- Quote templates ---

CHRIS

1:12:53 So, so this is all the deficiencies coming in, from the field. And I'm just gonna come in here and start turning these deficiencies in the quotes. And then you guys would obviously have your templates with all of your cost and your markup rules. And then obviously, you're going to get the data you need back from the technicians to turn those things out in the quotes... similar with invoices.

--- Quote templates ends ---

CHRIS

1:13:14 This is where we would, I just kinda talked about this running a report from, in the invoice status side of things.

CHRIS

1:13:25 Go to the, you guys want to see the portal real quick?

CHRIS

1:13:33 So obviously they would log into your website and each, let me rewind a little bit.

--- Recurring maintenance ---

CHRIS

1:13:40 Where did I want to? So each location is going to have contacts associated with it, underneath their contacts, that's what they will have visibility with in the portal. But then they can come into the portal and they can see, you know, service overview. I can see all the locations that I manage.

--- *Dispatch* ---

CHRIS

1:13:56 I can see all the different services lines. But as I scroll down, I can see any upcoming jobs. I can see all of my past recently completed jobs, right? So I could open up a job page. I can also come in here and see that, you know, a tires, I can go see my location as well.

--- *Recurring maintenance* ---

CHRIS

1:14:15 So here was that job that we did back on August 30 first 2023 two point a portable extinguisher and exit location sign, blah, blah, blah, right? So they'll have that service link as well. They can also see this location because I manage that here's, every single deficiency that we've tracked at this specific location.

--- *Quoting* ---

CHRIS

1:14:37 I can request service. So I don't have to pick up the phone and call you. I can also go ahead and go to this location and find a quote. I can see this quote is already been approved back by Graham on January fourteenth. But if there was a quote that was open, that would be there, you could obviously approve that quote, right?

--- *Assets* ---

CHRIS

1:14:55 I can go ahead and click approved. So now that quote has been approved... I can see all the different pieces of equipment out of location. I can see a service history.

CHRIS

1:15:14 Here's all the locations and assets that I manage. And then again, one other way we can see all the deficiencies and quotes.

--- *Assets ends* ---

CHRIS

1:15:30 Thoughts.

PETER

1:15:33 I got it's a lot too.

CHRIS

1:15:37 I...

PETER

1:15:37 Don't know... as far as, and I don't think we saw this portion. We saw how a technician would gather information from the field for a quote. But is there currently a way that they can formulate their own proposal and have a signed off proposal signed in the field? I know we talked about?

--- Tech On-site ---

PETER

1:15:57 Yeah.

CHRIS

1:15:59 Yup. So they go, they can do two ways. They can create a work acknowledge a work authorization, right? So... let me go through that's. Annoying. I got to get rid of, hang on.

CHRIS

1:16:20 They can go through a pre work authorization, right? Where it's like, hey, Chris, I'm gonna go ahead and I don't have you on that specific job because it was completed. Where was this capital one arena, right? So I can come in here and say, hey, I need to get a pre work authorization, right? And I could come in here and I could pick Chris kid. Well, you're gonna authorize that? I'm gonna do X things and you build out whatever it is that you're gonna do from X things I agree, confirm and sign... right?

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

CHRIS

1:16:54 So, Chris kid, well, just approve me to do whatever work I chose to do. There. Down there at the bottom is a view more details button, and this is where they would go to a location page and build out a quote. And I won't go through that process.

--- Quote templates ---

CHRIS

1:17:11 It's the same as the office, but they're going to go ahead and say capital and arena, I got a Construction job, service call, whatever it is. And they start to build out their quote where they'll add their items and they'll build that quote out and then send it to you just like we did back in the office.

--- Recurring maintenance ---

PETER

1:17:29 Okay.

CHRIS

1:17:30 So, not as fluid as the office, but the capability is there to go ahead and build all those things out.

PETER

1:17:36 Sure. Okay.

CHRIS

1:17:43 So the only thing I didn't do is show you, our predict, what I call our predictable scheduling. This is where I can run a report, show me all of my preventative maintenance stuff.

--- Dispatch ---

CHRIS

1:17:55 Next month. Again, we can filter out by the different offices service lines too, right? So lots of filtering functionality. Most of our customers will do will just check this box, which is all of them. I don't want to check, take all of them. So I'm just gonna grab a couple... gonna go ahead and say, these are going to be all of my preventative maintenance programs.

--- Dispatch ends ---

CHRIS

1:18:18 If I wanted to throw Chris on here right away and just let Chris take these and go, I can, if not, I leave it blank, just a quick snippet of what's kinda going on 200 dollars for three hours.

--- Dispatch ---

CHRIS

1:18:30 We have the concept of tags too. So, so think of that like a social media hash tag. It's another reporting functionality, filter functionality based off of some unique business cases you guys may have. But what I do is I go ahead and create those nine jobs.

CHRIS

1:18:48 And now that there's nine jobs have actually been created, I'm gonna go ahead and they'll get thrown up on a map. And again, I can filter out this map how I need to see it. You guys wouldn't have all these service lines obviously... but I can, you know, limit it by the tags. Like I was just saying... I wanna see all of, my big jobs, a 1,000 dollars and higher, whatever that is limited by the regions area filter... right? And now that's going to throw everything up on a map. And now I can see we'll just kinda

hang out here. You can see gray means that there's no tech and no appointment associated with it. So I can drag and drop and say, Chris, you're going to get to Pittsburgh... and I can just say you get to that job while you're out there... gonna have to drill down a little bit and I can drag and drop that blue one to Chris. You're going to get their Saturday as well.

CHRIS

1:19:52 So if I wanted to throw Chris on that New York job as well, I can. So multiple technicians on a work order, multiple day appointments.

--- Purchase decision ---

CHRIS

1:20:09 Just for example, that's a three day appointment with two guys on it and you can change that as well. So Chris can be day one, Johnny, day two, Billy Jimmy and Johnny day three.

CHRIS

1:20:24 Throw at in an hour and a half.

PETER

1:20:27 Yeah... for sure.

CHRIS

1:20:31 Through a whole lot at you... thoughts questions. Next steps concerns what you'd be the minute and kinda tell me how to help steer this.

--- Purchase decision ends ---

PETER

1:20:44 So the, yeah, I think my biggest grape again with GP is their scheduling platform.

PETER

1:20:53 You have to remember, GP is separate.

PETER

1:20:55 Mobile tech or I should say schedule is what it's called... the monthly. We're looking at what this is a weekly calendar. Yeah. As far as the scheduling calendar?

--- Dispatch ---

CHRIS

1:21:07 This is one way to see a weekly view. I could also see it in a daily view. We also have this dispatch board.

PETER

1:21:15 Right. The dispatch board is that we've been running... when then a monthly view, can you just go to the monthly view? Because what, the weekly is just, you got to scroll every hour over and just...

CHRIS

1:21:30 Every day?

PETER

1:21:31 Yeah, we kinda like to look at like a big picture of what the month looks like?

CHRIS

1:21:37 Yep. So you'll see that we can also do it this way as well. So more of a Google calendar view. I'll just click a couple of guys so you can kinda... see a Google calendar view... of a weekly view.

--- Dispatch ends ---

CHRIS

1:22:02 And obviously those would be four eight hour blocks based off of what you told me.

PETER

1:22:07 Yeah, sure. Okay. It's a lot of info to take in.

CHRIS

1:22:16 Yeah. And, I recorded this, so I will send you this recording... and then tasking, we didn't get the tasking today.

--- Purchase decision ---

CHRIS

1:22:26 We did spend an hour and a half kind of going over the core product. So we didn't get the tasking. So there's a, there's still a lot to unwrap... what, how do you want me to proceed? When do you want me to follow up? What, what are your thoughts? I?

PETER

1:22:42 I mean, we currently are looking at a couple of different platforms, obviously doing our due diligence, can also betting at like what we currently have, is it that far, like what are the big improvements? Obviously, this would be a big undertaking, switching software for a decently sized company.

PETER

1:23:04 So, are we set up to do this right now? And being a big undertaking as far as the tasking too, it's something that we're not currently doing. We, we've looked at it. We know that's a big item to take under two just for each piece of equipment, and all the equipment that we do have.

PETER

1:23:26 I also think that a lot of your product like what you showed us, I think there are, they're really good things for our guys to have out in the field is just that they're so not used to that. It would be like a big... again just to get them familiar with it.

PETER

1:23:46 It would probably take a lot of time because they, we, what they do right now is on such a slim scale compared to what you guys, what you just showed us can be done honestly?

CHRIS

1:23:57 Yeah. The, the text pick up on it quicker than you think.

PETER

1:24:01 Yeah.

CHRIS

1:24:02 Their, their brains are kinda wired to figure out how to fix things.

CHRIS

1:24:07 And so they look at it as a puzzle and then once they kinda pick up on it, they don't go backwards meaning that now that they have all this information at their fingertips, they typically eat it up and love it. But, but it is change management, right? Hey, guys, we're making a change.

PETER

1:24:26 Yeah, exactly.

CHRIS

1:24:28 Just...

PETER

1:24:28 Like want them to put their timing on time, you know, it's just how you keep on top of them with that stuff.

CHRIS

1:24:36 Yeah.

PETER

1:24:38 Yeah. So I mean, as far as, you know, next steps here, I mean, as far as you basically went over everything you guys got, obviously we can go into great detail, sure and when we would need to, but basically covered everything that I think we need to.

--- Accounting integrations ---

PETER

1:24:53 We are again gonna check out a couple of other platforms and see if they do have to offer. I do like this product a lot.

CHRIS

1:25:02 Yeah. What else are you guys looking?

PETER

1:25:05 BuildOps is one... GPS, got some more stuff for us to look at as far as their upgrades service tight.

--- Accounting integrations ends ---

PETER

1:25:17 And we saw them out there. I think they're kind of, a residential stop. I don't know that they'd be in the commercial footprint. There's a couple of there out a, that is gonna talk to as well. But you're definitely one of the top ones we wanted to check out.

PETER

1:25:37 Now, how does it work with importing all of our data? Like let's say we just pull the trigger. We don't stay with GP. We don't stay with, we could go with service trade and then use this NetSuite. Let's say, we realize this is really the way to go.

--- Accounting integrations ---

PETER

1:25:53 How are we going to import all the data we presently have and not lose it? Or we gonna have to keep opening up and getting and pulling data from our old system... you know, history on the.

CHRIS

1:26:09 Yeah. So there are some questions in there that I can't answer. And what I can't answer is a new accounting change, data migration piece because I don't know how those things work. That's going to be a NetSuite question or a Sage question or whoever that whoever Quickbooks whatever that accounting system is. I don't know from a service trade standpoint, we can import pretty much anything that you guys can get into an excel or CSV file.

--- Accounting integrations ends ---

CHRIS

1:26:40 Past jobs in history, is hard because typically that data is not clean. So customers is pretty clean. Reoccurring services are pretty clean. Data. Pieces of equipment is pretty clean data, getting pictures and pass video. If you guys are doing that is typically not capable of happening. You would just keep one license.

--- Implementation and ongoing support ---

CHRIS

1:27:05 It went off running in the background for a year or two years or however long you guys need that history for. And then, you know, starting January one, everything would be live in ServiceTrade and history lives in service trade from there. And then, you flip flop back and forth.

PETER

1:27:21 Okay. Can...

CHRIS

1:27:23 Answer, the accounting side questions there?

PETER

1:27:27 I'd be more concerned with the service side of it that's you know, just that's what the text would need out in the field more. So, yeah, now.

CHRIS

1:27:35 Yeah. And, and we go through a very rigorous training program as well. So, the onboarding side for you guys probably plan on three months with a pretty rigorous training program. You can probably talk to Chris from Willis about what all that means, what all that looks like. So we do that data migration. We give you guys a sandbox account, make sure everything looks good, make sure all the data has been scrubbed and clean, and right play in the sandbox, make sure the training is there from the office and the tech standpoint, the office training is way harder than the tech standpoint. We're also going to be on your guys site for go live. So we'll come up and be with you guys when you guys choose to go live to make sure that there's no, you know, speed bumps or hiccups that happen. So all that data migration should be good and we're there kind of making sure that there's nothing wrong when we do go live.

PETER

1:28:28 Gotcha. One thing I know we talked about in the beginning, I don't think we hit it though was the cost, what's this? What's this gonna cost per tech... size of our company?

CHRIS

1:28:40 Yeah. Let me, so it is a license by technician... and you said you had 35 guys, my internet is just clogged, hang on a second. So if you're basically looking at 189 dollars a month per tech?

CHRIS

1:29:08 Now, that doesn't include some of that does not include the onboarding and the data migration piece. And I can give you a formal quote if you want. But... you know, typically.

PETER

1:29:20 When you say the license by text, what about the people in the office that would also have to be involved with that?

CHRIS

1:29:27 They're free.

PETER

1:29:28 Okay.

PETER

1:29:28 Right. We're basing off 34 text. We're talking close 80 grand in the year.

CHRIS

1:29:36 Yes.

PETER

1:29:39 And that's with all support included.

--- Pricing ends ---

PETER

1:29:52 Okay. Hi, very good.

CHRIS

1:30:00 When, when should I, when should I bug you to kinda set up the task? I give you guys a week to?

PETER

1:30:05 Yeah. So let's... as far as a task. I mean, I know that I can get down in the weeds with the task and I don't know that we'd actually end up ever using it to be honest with, you know?

CHRIS

1:30:21 A lot of people don't a lot of people will tackle that year three or four.

PETER

1:30:25 Yeah, I...

PETER

1:30:26 I almost needed on the.

PETER

1:30:29 Is Navin.

PETER

1:30:30 Yeah.

PETER

1:30:31 Checkbox. I mean, it's kinda, I don't know.

PETER

1:30:34 So it's just the check list more so.

PETER

1:30:37 Data item.

PETER

1:30:40 Don't do that or we're gonna have that same or we have someone in the job?

--- Forms ---

PETER

1:30:44 Depend on using the, would you agree? Like if you're gonna intend on ever using task and you wanna do it from the get go?

CHRIS

1:30:51 Depending on how in depth your tasking is, can dictate that. So we also have, we didn't even talk about this. We can do fillable PDF. So that's a little bit easier transition, right? Where you just launch a fill able PDF and we'll pre filled all the data fields. So they won't have to put in locations, addresses, assets, pieces of equipment. Any of that stuff. It will be your forms now that you guys are using turn into a fill able PDF and we'll pre, fill all the data and the technician will just say, yes, yes, yes, no fit.

PETER

1:31:21 Yeah. And.

CHRIS

1:31:22 Just fill PDF done and done that's an easier transition. And then if you wanna get really nitty gritty down into the weeds on tasking, we could do all sorts of creative things. We do some cool stuff on the fire protection side, with pumps and stuff and pump graphs and overlaying years past of pump graphs and future requirements for pump graph. So we can get really down nitty. Gritty. But point of there being, we got an easy way in a hard way.

PETER

1:31:47 Yeah. You actually just brought also did have a question as far as we're big into reading sheets, documenting pressures, temperatures, rates, all that stuff... what's that look like? And where is it found?

CHRIS

1:32:04 Yeah, that would probably be on your PDFS. From what you're saying, that would be on your PDF that, we have two ways to do that. That's part of the tasking conversation. Way, one is through the PDF. The other way is through the tasking workflow which is going to be more of a smart workflow and dynamic workflow if you will. Where the PDF is a pension Zoom, it's just, it's a PDF and it's dead. You know, once, it's done where the other way is like a yes, yes, yes, no, if, no, why it fit the PS, I, why, and you can require a bunch of guard rails to do that, but that requires a lot of setup based off of your guys parameters.

--- Implementation and ongoing support ---

PETER

1:32:45 Okay. And that would be included or reset it is okay?

CHRIS

1:32:50 Yes.

PETER

1:32:52 Okay.

CHRIS

1:32:57 So, have you guys start timeline?

PETER

1:33:00 I do, I mean, obviously, this is the first sit down I've had since the seven in and out of trainings and all sorts of stuff going on here. We do have to get a couple of other guys lined up.

--- *Purchase decision* ---

PETER

1:33:14 I haven't done yet. To be honest with you. I would say maybe check in about two weeks and kinda see where we're at and then we'll kinda come up with, you know, next steps. Obviously, this isn't gonna be all right. We're changing right now.

PETER

1:33:30 Yeah, it sure is. And it's gonna a lot on both of us here. So.

--- *Purchase decision ends* ---

CHRIS

1:33:34 This is major lift.

PETER

1:33:36 Yeah, I'd say, let's check in about two weeks from now, maybe to, you know, after the holiday at that point, I'll touch in.

CHRIS

1:33:43 Before thanksgiving and.

PETER

1:33:45 Yeah.

CHRIS

1:33:46 See, see where the thought process is and what we need to do from there. Okay?

PETER

1:33:50 Sounds good.

--- *Dispatch* ---

PETER

1:33:51 Awesome. Appreciate your time today. Thank you.

CHRIS

1:33:53 Thank you, Chris. Nice to meet you guys.

PETER

1:33:55 Nice to meet you.

The End