



# Call with Arctic Air - Mike Flesher

Aaron Ward with Arctic Air  
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## Participants

### **SERVICETRADE**

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*Territory Manager*

### **ARCTIC AIR**

Mike Flesher  
*President*

# Topics

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# Transcript

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MIKE

0:00 Good afternoon, Arctic air.

AARON

0:02 Hey, is this... Mike? Hey, this is Aaron from service trade?

MIKE

0:03 Yes, it is.

MIKE

0:07 Hello. How are you?

AARON

0:09 Good. Do you have a minute to talk?

MIKE

0:12 I do.

AARON

0:13 Okay. Well, hey, you know, it's been a couple of weeks, two weeks. I think since I talked to you last... you know, got some more information about some of the things we talked about, but I also was gonna see if you had made any decisions about which Quickbooks platform to you. We're going to move to.

MIKE

0:22 Okay.

MIKE

0:30 I haven't yet. No, I'm kind of leaning toward the Quickbooks online.

AARON

0:36 Yeah. Okay. Well, I wanted to tell you a few things, so.

AARON

0:43 You know, for, you know, we do integrate with either one of those by the way. So that wouldn't be a problem, but I was just curious. So if, you know, wanted to see us again and then maybe take a look at what that might look like on your end. We can, I know we had talked about that before or you had with John, so.

MIKE

0:49 Okay.

AARON

1:06 For, I believe you'll be making your purchase orders in Quickbooks. That isn't that, right?

MIKE

1:16 I suppose. So we're versus what?

AARON

1:19 So we...

AARON

1:21 Us making them. So, you know, we service trade core has an extra, we have an M, a module called parts ledger that specifically being built out to help with inventory tracking. It's. Not completed yet. The, we have, you know, kind of like phase one rolled out. It allows you to create purchase orders, but it's an additional module. It might not be necessary for you just kinda depending on what you're needing to do. So if you're gonna be able, if you're going to be making purchase orders out of Quickbooks now and just need to track the, you know, the parts and kind of tag jobs in for the invoicing with a purchase order numbers. We could do that with service trade core, you wouldn't have to necessarily use service trade to create the po number. I think that was one of your primary things that you're worried about was, you know, your guys picking up parts for maybe a supplier and then if not being billed appropriately, and there's no tagging for you to track where the inventory is going. So they might use it on a job, but it's not being like input it anywhere.

MIKE

1:32 Yeah, yeah.

MIKE

2:24 Right.

MIKE

2:33 So, so you create the purchase order and Quickbooks, and then you use the tag?

MIKE

2:44 I guess to track it in ServiceTitan?

AARON

2:46 In service trade, it's service trade. Yep. Yep. And I know that the other thing you were asking me about was, you know?

MIKE

2:49 Or service trade rather, sorry.

AARON

3:01 Let me see here because I took some notes here, the markup rules. So we do have the ability to make, you know, for you will be able to create any kind of markup rules you want with our premium account.

--- Pricing ---

AARON

3:18 So the, our pricing structure has like three levels will say select the lowest and then premium. The enterprise is really for large companies with like multiple offices for you. All the premium would do probably what you're needing it to do with like complicated contract pricing that changes for each one of your customers with like sliding scales and whatnot, you can kind of program it to the markup to be kind of whatever you want it to be.

MIKE

3:06 Yup.

MIKE

3:47 Okay.

MIKE

3:50 Okay. I might wanna see that in the demo, how that works.

AARON

3:51 So, we...

AARON

3:56 Okay. Yep. It's really. So we call it, you know, contract pricing. So for, you know, you would have one customer with like one set of rules and the rules that create, you might call the contract. Like I don't know contract and you give customer a contract day and you can set that to be whatever the rules you want. So items that are priced a, you know, a certain markup up to 50 dollars, and then every item from 50 to 100, it'll be, you know, you can program it. So it could be more just kind of whatever you need. And then you could use that in contract on another customer or you can create as many different contracts as you want each one with different market rules and apply those data of your customers. I think that was kind of what you were looking for was.

MIKE

4:43 Okay.

MIKE

4:46 Okay. So... it sounds like, yeah. So, so I could have markup schedule one... and have it on 90 percent of my customers. And the other 10 percent. I could have 15 different mark up rules are markup tables or whatever. Okay?

AARON

5:00 Sure.

AARON

5:08 Exactly.

AARON

5:11 I think that was the only other thing was you had asked about payroll.

--- Pricing ends ---

AARON

5:16 So just, you know, just to be honest with you, we can track time as your guys clock in and clock out. It's not going to sync over to Quickbooks though. So you'll be able to run a report to generate what their times were for any given time period. So, maybe you just want to run a report, see what they, what their clock events were for a given week and you can input that information, you know, however you choose to do payroll. Some people use stuff like adp and they just kinda enter that in. But if that, the hours themselves won't integrate over to Quickbooks?

MIKE

5:16 Yup.

MIKE

5:26 Okay.

MIKE

5:54 Okay.

AARON

5:56 So, I don't know if that was kind of a make it or break it for you, but I just wanted to be transparent with you about it.

MIKE

6:02 Okay.

MIKE

6:05 Yeah. I gotta talk to the person that does our payroll and we're trying to switch over to payroll service. So that's hopefully going to happen in the next two weeks.

AARON

6:16 What does that mean exactly? Is that like a, you're gonna use a third party to kinda take care of like human resource kinds of services?

MIKE

6:21 Yes.

MIKE

6:24 I guess... we're actually just using them. I think just gonna start out using them for payroll where we would a lot log into their system. And we then are all the hours and job information.

MIKE

6:45 And they would drop pay next and do direct positive for us to take care of the tax short and W twos at the end of the year and that type of thing?

AARON

6:53 Right.

AARON

6:56 Okay. Is that your office manager, you're gonna talk to you about that?

MIKE

6:59 Yes... yes.

AARON

7:00 Okay.

AARON

7:02 Well, in that case, you might not need, you know, the integrate time integration, but so I guess that would work for you. So if we could, if I can show you what the markup rules look like or how to create them for your different customers and we can, what else can I do to facilitate us kind of moving this forward for you all?

MIKE

7:09 Yeah, right.

MIKE

7:29 Do you?

MIKE

7:34 Can't and do you have a, do you have a list of quick books, authorized or certified people that have worked with service trade client?

AARON

7:50 Yeah. So you're looking for kind of a customer reference?

MIKE

7:55 Well, I'm...

MIKE

7:58 I contacted two or three Quickbooks certified advisors. I can't remember, I don't remember what Quickbooks calls them, but... they're certified by Quickbooks is Quickbooks experts and their consultants there, Quickbooks consultants, but they're they, they've had specialized training or extra training with Quickbooks or whatnot. So, they supposedly know Quickbooks inside and out and I've talked to two or three of them around my area. None of them... are familiar with service trade.

MIKE

8:37 Because they don't have apparently because they don't have clients that use service trade. And... one one lady started.

AARON

8:41 Gotcha.

MIKE

8:47 I thought pretty well, and then after we chatted for a while and I started to follow up with her like I wanted to hire her, she passed me off, you know?

--- Small Talk ---

MIKE

8:59 So, you know, I'm too busy here's. A couple of other people that should be able to help you. And neither of those individuals, no of service trade. And in fact, one of them, I may, if I may have told you this said you really ought to look at Quickbooks service by curry go or quarter ago.

MIKE

9:22 And, you know, she seemed to be more familiar with that and was, is directing or wants to direct me towards.

MIKE



9:32 The Quickbooks version of service management by or go or whatever they call it officially.

MIKE

9:42 So... you, you've got a lot of people, a lot of customers that use your product with Quickbooks?

AARON

9:49 Yeah. Yeah.

MIKE

9:53 So, I figured that since you're you guys are so for Alyssa prolific in the field in the industry, that certainly you must know some Quickbooks experts that are very familiar with service trade that I could talk to him and maybe, you know, if we go with service trade, that I could then hire this Quickbooks expert to help us implement install, get started and, you know, help us move smooth out some of the bumps that are invariably going to come our way.

AARON

10:29 Okay. So, yeah, you're looking for a Quickbooks advisor to hire to help the implementation?

MIKE

10:35 That, who knows, service trade who's familiar with service trade?

AARON

10:39 Right.

AARON

10:41 Well, I mean, we have one on staff that's kind of new. She came in for sort of that reason to help like, you know, advise it, explain we have what we have a, another person like that for other accounting systems too, but they both came from the industry. So.

MIKE

11:01 Okay.

MIKE

11:05 From H, JC are contracting or?

AARON

11:07 No, honestly, I don't know specifically, like what kind of company that was. I know the, or the other one we had, she came over from construction like a really big construction company. She was like the CFO there... the Quickbooks expert. I'm not

sure. She's kind of new. I don't know. We're honestly that well, I knew a tornado hit her house... like a couple of weeks ago. So she's actually been out of office. I know it's really, it was really crazy cause she's can't remember where she lives, not somewhere where there's a lot of tornadoes regularly, you know, how weird the weather's been recently.

--- *Small Talk ends* ---

AARON

11:45 So I'm normally, you know, she'd be the one that would probably need to kind of help you. I don't think she's somebody that you'd be able to like higher isn't advisor though.

--- *Small Talk* ---

MIKE

11:14 Okay.

MIKE

11:22 Okay.

MIKE

11:35 Jeeze. Okay.

--- *Small Talk ends* ---

MIKE

11:55 Okay. Well... that, no, that's fine. And then at least it's somebody that could maybe help me get a little deeper in a demo between the integration... or get deeper into a demo of the integration between Quickbooks and service trade and how some of that works because I, if I remember, right when I did the service trade demo and I can't remember who it was worth if it was with you, John. Okay. I think there were a couple of things that I asked him that he couldn't really answer on the Quickbooks side.

AARON

11:57 Just to be honest with you.

AARON

12:20 Yeah.

AARON

12:27 It was, no, it was with John, yeah.

AARON

12:37 Yeah.

MIKE

12:38 And...

AARON

12:39 That's why we brought her in. But that's one of those things where, you know, if you're gonna want to know what, you know, hey, if I do this operation, what's it gonna look like on the Quickbooks side we'll probably need. I mean, they'll it might look very differently depending on which platform you choose. So we'd probably wait until you make the decision on which one to move to a, you know, for sure, and then we can probably like a range of time to kind of go over the integration work, but I mean, is there like a specific list of questions that you might have about that you could send us? So we're prepared to show all those things to you on a follow up.

MIKE

12:49 Right.

MIKE

12:56 Yeah. Okay.

--- *Wrap-up* ---

MIKE

13:16 Yeah. I think I can come up with that.

MIKE

13:22 I am, I have to leave in a couple of minutes for appointments. So I'm gonna have to cut this short very quickly.

AARON

13:25 Okay. Yes, sir. Yeah, no problem. I'll shoot you an email over and I'm just gonna say, hey, send me those questions over and then we'll get those answered and we'll show you what we can add a Quickbooks site, but it sounds like you're leaning towards Quickbooks online.

MIKE

13:33 Okay.

MIKE

13:39 Okay.

MIKE

13:45 Yes, that's what I'm leaning towards right now.

AARON

13:49 Okay.

MIKE

13:51 Okay. I'll look for the email.

AARON

13:52 I wish I could help you more with the adviser things, but I honestly, I don't know we can help. I'll ask around.

MIKE

14:00 Well, maybe... do you personally have some HV AC, contract or customers that, you know of that are using Quickbooks and maybe you reach out to them and ask them if they're working with a Quickbooks advisor?

MIKE

14:23 You know, at any point, you know, either on retainer or just when they needed, you know, maybe that we get a couple of those names. I can talk to them and.

AARON

14:32 Yeah, for any kind of a customer reference, what we do is we will call them and see if they're willing to have a meeting with you. And at that point, that's totally us, hands off. You can talk to them about anything you want to. So that it's not, it won't be seemingly biased on, you know, us like pressuring them to give you a good answers, but we usually, that's one of the last things we do is give references because we're gonna, you know, we're gonna call up companies and ask them to take time out of their day to meet with you. And so, if, you know, if, you know, the service trade is going to be a good fit. You just want that last customer reference. We're more than happy to do that to you.

MIKE

14:40 Okay.

MIKE

14:49 Okay.

MIKE

14:52 Okay.

MIKE

15:04 No, I get it. Yeah, no, I get it.

AARON

15:15 But we just wanna make sure that you're either sure that this is probably a good fit for.

MIKE

15:21 It's yeah, it's on the shortlist.

AARON

15:26 Right.

MIKE

15:28 I can't be to come middle at this stage or I'm gonna give everything away?

AARON

15:33 Okay. Well, I'll let you go.

MIKE

15:36 No, but I know you guys are on a short list and it's down to two.

AARON

15:43 Okay. What's the other one?

MIKE

15:45 It's...

MIKE

15:48 Okay. I was just looking at it the other day.

MIKE

15:55 I'm drawing a blank hold on a second.

MIKE

16:05 I was not thinking about soft her just now when you called and...

AARON

16:08 Right.

MIKE

16:11 Build apps.

AARON

16:14 Build ups. Okay?

MIKE

16:14 BuildOps.

MIKE

16:18 So, may, maybe you guys can put together a list of pros and cons of you versus build? Apps.

AARON

16:29 Yeah, I...

MIKE

16:30 Or maybe you have one already? Or maybe you've never heard of BuildOps?

AARON

16:34 Know, I have, it's, just been a while. Honestly. I've heard them. I think some, there are some softwares that are just bigger in certain regions of the country than others. And, yeah, I haven't heard, I haven't heard them lately. So... build ups, yeah, I think they were an HP, I, any trick, focus off where?

MIKE

16:39 Okay.

MIKE

16:45 Okay.

MIKE

16:50 Okay.

MIKE

17:00 You know, hey, I'm sorry, I do have to go. I gotta be out the door. So, so send me that email and I might, I don't know if I'm gonna be back to the office today or not, but I'll look at it. Okay. Thanks for calling. Bye bye.

AARON

17:00 H back.

AARON

17:07 Yep. Doing it right now. Just send it.

AARON

17:12 Okay. Sounds good, Mike. Alright. Yup. Bye bye.

*The End*