ServiceTrade Accounting Integration Convo

Katie Mullen with Legacy Mechanical
Recorded on 1/23/23 via Zoom, 1 hour 8 min.

Participants

ServiceTrade

Katie Mullen
Field Manager

Ozella Bowman
Solutions Architect

Tanya Eney
Partner Manager

Lauren Rice
Director of Enterprise Sales

Legacy Mechanical

Daniel Banta
Consultant

Other

Sirisha

Legacy Zoom

Topics

Transcript

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

LAUREN

0:00 The teams looks so much worse because you can do like the face filter on Zoom.

LAUREN

0:07 Do I...

OZELLA

0:08 Yeah, I have a nice.

LEGACY

0:09 Filter...

LAUREN

0:13 All right. I'll my Mike on first.

LEGACY

0:16 I'm...

LAUREN

0:16 So, okay. No, no, no... all right. You have your slides. I'm...

LAUREN

0:28 I beautiful.

LEGACY

0:30 My background.

OZELLA

0:35 I make a background.

OZELLA

0:43 Times you get in.

LEGACY

0:44 Last night, Jack, did you get in here or did you?

LAUREN

0:47 No sales closed at nine and I got work nine at four.

OZELLA

0:52 No.

LAUREN

0:53 Maybe.

LAUREN

0:55 Sometimes that's what you got to?

LAUREN

1:05 Hi, Jack. Hi, Daniel?

DANIEL

1:09 Hello? Hey, Lauren.

OZELLA

1:11 How's it going?

DANIEL

1:12 Good... good. The phone call, the phone call?

LEGACY

1:16 Same...

LAUREN

1:17 As did you have a nice weekend doing nothing?

DANIEL

1:22 Yep.

LAUREN

1:23 Awesome.

DANIEL

1:24 That was my plan and I stuck to it.

OZELLA

1:32 All right. Well.

LAUREN

1:33 I have, did I add azela to the right invitation? I've got our solution architect, azela joining us as well. I did add her. I was just, she's gonna walkthrough the project management stuff. And then I Tanya from my team, who is our director of partnerships and knower of all things a.

OZELLA

1:58 Counting and...

LAUREN

1:59 Finance, who will talk about the Sage intact integration?

LAUREN

2:04 Used to...

LEGACY

2:04 Work with Nick and I think they had the demo with them.

LAUREN

2:06 Yeah, she, Tania, used to work with Nick over at alliance.

DANIEL

2:11 Okay.

LAUREN

2:13 So, it's a small world?

DANIEL

2:14 Yeah, exactly. Was talking to her earlier, so she just logging in.

LAUREN

2:25 Okay. And then I do have a sort of a rough draft of pricing that I have pulled up to show you as well. So, let me get that somewhere acceptable?

OZELLA

2:37 Hello? Hi, Ozella. Hey, ladies. How's it going? Ladies and Daniel?

DANIEL

2:46 Yeah.

LEGACY

2:47 Let me...

OZELLA

2:48 Extend my screen. Where is... Daniel?

LAUREN

2:52 May not see him because he's...

DANIEL

2:54 Yeah, I don't...

OZELLA

2:56 I see him. You know what that's so, are we recording it. I was gonna say, have you guys heard the whole like, hey ladies, where is that from parks? You know what I'm talking about? And then every time, what was your name? What's his name? And every time he came in the room, it was like, hi ladies. Hilarious. Now, I missed.

LAUREN

3:23 Can you hear us?

LEGACY

3:25 Is stepping in shortly? I think she's just taking five real quick little meeting.

LAUREN

3:32 Who's this?

LEGACY

3:34 This is Joe. So, I...

DANIEL

3:39 Yeah. So, yeah. So, Joe, and some other folks from the contraction project management side will join with who else is going to be there? Joe?

LEGACY

3:48 Jan just walked in. We've got Daniel here as well.

DANIEL

3:51 Okay. There's another Daniel. So, okay. All right.

OZELLA

3:56 We'll...

LAUREN

3:57 Let you guys get settled and then we can get started. I'll make the introductions from the service trade side of things and the Legacy. I'll let you all introduce yourselves to Ozella and Katie. Well, you met Katie. I was looking at your name and Tonia. So, yeah, just holler when you all are settled and we'll get started.

LEGACY

4:17 I think we're ready to start.

LAUREN

4:19 Okay, perfect. Well, for those who haven't met me, I'm Lauren, I'm the senior director of sales for the west at service trade. I met some of you in the office last week. I'm joined by Katie, who you all know already. And then Ozella who's our solutions architect, and nower, of all things project management, as well as Tanya, who is our director of partnerships and nower of all things accounting and Sage intact, and she knows a lot about finance. So, Janet, you and Tanya are gonna get along great.

LEGACY

4:53 You...

LAUREN

4:54 A...

DANIEL

4:56 So...

LAUREN

4:57 Thanks for joining us this afternoon before I turn it over to Ozella. I'd love to get a feel for who's in the room on the Legacy side of things.

LEGACY

5:08 Sure. I'm Joe lease, I'm a project engineer here. So I do scheduling estimating and some functions. Daniel, long date for me over here with the Legacy family director of preconstruction, and we'll be helping out with operations past life in everything from project engineering, project management, estimating, all the way up the business development... project, financial tracking, safety. So touched a lot of different areas.

LAUREN

5:52 Gotcha. Okay. Nice to meet you both and Janet, do you wanna introduce yourself for Tanya again?

LEGACY

5:57 Yeah, I'm Jenna, I'm the controller here. I've been here since about August and this has been our main focus, you know, trying to get this so we can really get a good financial insight to how we're doing on service and Construction because I believe Construction is just a part.

LAUREN

6:20 Right. Well, I had planned to start off with a review of the project management stuff first and let Ozella take it away. I'm not sure if Ozella has any questions for you all before she gets started into the product. I have just one question and I think we answered this last week, but just for the benefit of those new to the conversation, can you all describe to us sort of the scope of the Construction that you all are doing? And what percentage of your revenue comes from Construction? Do you mind sharing that?

--- *Type of work* ---

LEGACY

7:00 So it's mainly, you know, H, back installs that's a big that's supposed to the Construction on sales. And so some ti, right? And then it is about almost 50 percent of our revenue is the jobs aren't there's obviously more service and jobs or work orders but we have what last year? We did have many like 160 jobs. Is that right? Or I think so. Yeah, yeah. About 168. So... some last just a few days and some last all here.

LEGACY

7:43 Yeah, and some last multiple years, right? We'll also do equipment change. Outs. Is another big one that will do... retrofit system modifications, tenant improvements, you know, retrofit Construction, okay?

LAUREN

8:04 All right. That was my question. I'm sure Ella has more.

OZELLA

8:09 That was the leading one. Actually. The, what types are we talking about? And good enough, my demo is based on an intact Installation stack, my gosh Installation and hvac Installation. So we can kinda work from that. And then typically these conversations go well with the back and forth. So I'm sure you guys will have questions along the way too based on what I'm presenting to you. But I will also mention, I know I heard you mentioned some projects go for years and typically, you know, the workflow that I'm sharing is more suited to those that are going to be a little bit shorter, longer than your, you know, standard service repairs, but, you know, a few weeks, maybe a few months but not typically to the order of years though you could work around that typically that lends itself to a larger system or something that's more dedicated to that like a pro core which is where those types of partnerships come into play and why we tend to work with companies like that for the larger options. But in any case, I'm gonna go ahead and screen share and we will walkthrough how we can accommodate some of that here. We.

LEGACY

9:23 You... were mentioning, sorry, real quick. You're mentioning like larger projects, of course, we're familiar with pro core and stuff like that, service trade might out by what to your limit if a project goes out that longer without the.

--- Type of work ends ---

OZELLA

9:40 Yeah. So it's not an actual hard and fast time limit, right? It's more so based on what types of things those jobs come with, right? Like those jobs tend to need things like Aia billing and things like that and general contractors. And so our system doesn't lend itself as well to that sort of interaction, right? You can have attachments to jobs. You can manage those communications offline, you can subcontract jobs. But typically, when you start talking about Aia and the documentation that goes with that, that's not service trade, does that make sense?

LEGACY

10:20 Yeah, thank you.

OZELLA

10:22 So, it's yeah, it's not as much, you know, we can't do a two year project. You can put it to your project in there. The system won't stop you. It's just what typically goes with that. What else does that need? And we're very cognizant and aware of the fact that it tends to require more operationally than we typically would provide. Okay. Thank you. Yeah, yeah, no problem. And just like that, any other questions, you just let me know and we can pause and try to talk it out. And if I don't know, then we'll ask somebody and get you the answer. All right. So we're looking at my service trade job. Yes. Can everyone see it? Cool? All right. So, I've got a ServiceTrade job here which I created from a quote and you can see that I created this job with the budget, right? So typically in service trade, I know that you're familiar with some of the hierarchy and the struggle structure that we allow for, right?

--- Recurring maintenance ---

OZELLA

11:20 So this job is set up for three phases of Installation and we would like in those phases to services, right? So you can set up service templates within service trade, which make it very easy for you to set up a service and have all of the bits and pieces in there including, you know, the duration, some of the parts that you may need for it, things like that are already associated.

--- Recurring maintenance ends ---

OZELLA

11:47 So I didn't have to go in and piecemeal this, it just pulled it straight off of my template and then created this job from the quote. If you have any questions about some of how I got here, then I'll be happy to go back to that after, but I just wanted to give you some context for what we're going to be looking at. So I have this job setup with my three phases, my services, all of the parts, and my technicians. And right now, I have one appointment and we can assume that it's probably not gonna all get done in one appointment. I can finish one service and then add another one, drag them down.

--- ST app contracts and pricing ---

OZELLA

12:23 That's as easy as it gets. I have my parts labor and items all sorted by service here. So it's really easy for me to kinda see right within that job view what I have allocated, where and what it's gonna cost me. I put some used on dates here even though we're at the beginning of this job because I wanted to be able to demonstrate for you some of the job page filtering... here. On a given job, we have the ability to actually say, I want to see what happens and on. This project, right? What happened here yesterday? And I can filter and then it will show me which parts, which labor items, what materials were used yesterday, same thing, who clocked in and out yesterday.

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

OZELLA

13:10 And I use yesterday as an example that's easy. But you can also filter for last week for last month, what's you know, set for next week, next month, etcetera. And when you're talking about a longer time frame project that becomes a very valuable feature. Does that make sense?

--- ST app contracts and pricing ---

OZELLA

13:27 Sure, absolutely. And then we want to talk about the budget. So I'm gonna come, you can see I've got a budget here. It's currently unlocked. And we also have an estimated price and all this is pulling over from that quote. So I was able to spin this up very quickly. I didn't have to do much, right? When I click view budget actually already had one open. There, we go the same one. So we'll just look here. When I click view budget, it's gonna bring me straight to the screen where I can see right away what my distribution of cost is for this particular job, broken out in some nice percentages. I can see the overall value of this job and my estimated margin. All in one view. I can edit this budget... and come in here and I can add additional items. I can say, you know, what this job is actually gonna take two of these. I can adjust the price I might use for this particular one and I can add another item. Let's say I wanna use some more material and I'm gonna use glass and that's that cost me 100 bucks and it's gonna apply these changes to my job automatically... and I can go back and I'll refresh that and we can take a look at it once I'm finished going through this view. Once I'm happy with my budget, then I'm gonna take it out of draft mode and we're gonna lock it. That locked feature is gonna allow us to have a fixed budget, right? And then we're going to start tracking who's making changes going forward, who's locking and unlocking? Who? And when they changed my budget total, right?

And when my budget was created, this is all driven by user permissions. So you can say who can come in and touch your budgets and who's not once a budget's been locked. Your best practice, if you need to make any changes, you no longer have that edit button, you're going to create a change order. Are you all tracking change orders today?

--- Quoting ---

LEGACY

15:30 I mean, yeah, what do you mean? Exactly?

OZELLA

15:32 Like actually doing them right? Creating change orders, sending them to customers getting approval.

LEGACY

15:38 Yeah. Change orders get estimated to get sent out. You know, once you get approval go, you know, through proper change can command.

OZELLA

15:48 Good. Awesome. Well, you'll be able to continue doing that with service.

--- Quote templates ---

OZELLA

15:51 Fat. When you come, you can actually add budget items. You can add service items. And what's going to happen is it's going to actually send a request to your customer? So if I just grab... let's say, I'm going to add... just a bunch of filters, I'm picking something a little bit random here, but I need these for the Installation... and we're going to send to customer for approval.

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

OZELLA

16:29 Then you've got a really nice pop up here that's going to give you kind of an overview of what it is that you've changed. We added a quantity. There's, a note if it were an internal change order. So it's something that's not gonna affect my customer directly.

--- Quote templates ---

OZELLA

16:44 Nothing that I need approval for, but it's just an internal change, you know, instead of using lift a I'm gonna use lift be something like that. Then you could set it as an internal change. If you had any attachments that needed to go along with that. You could include those here as well.

--- Quote templates ends ---

OZELLA

16:58 And then we just go ahead and make sure we select who at the customer organization needs to get... that particular notification. And once I've done that, I'm satisfied and say, thank you and send it out.

LEGACY

17:20 This is for change orders summary, right? If we were to start a new job, right?

--- Accounting ---

LEGACY

17:27 And applying costs to each of these base codes over here, right? You have labor equipment... these are manual entries? Or if I have an excel spreadsheet that I already estimate off of, can I then import from that excel spreadsheet directly into this program? Provided that the base code, general labor matches up with general labor equipment, matches up with the equipment?

--- Parts management (inventory) ---

OZELLA

18:00 So if I understand what you're asking correctly, you currently have a list of items and prices or costs for those things. And rather than manually entering all of those in service trade, you would want to have that here so that our system can just read off of it.

--- Accounting ---

OZELLA

18:17 And that's exactly what would happen once you're on boarded with us. Yep. So you would know if you'd be relying on that spreadsheet, it would just be pulling from within the system. Yep.

LEGACY

18:27 But, so, so if I estimate right in excel... and then I want to hit a button to be able to upload the data that I have in my excel spreadsheet CSV file directly into here.

--- Quote templates ---

LEGACY

18:45 So I don't have to manually input everything, right? So I'll say equipment in my excel spreadsheet goes into the equipment part in this change order or into this estimate. Can I do?

OZELLA

19:00 No, no, it's not gonna work like that.

LEGACY

19:04 Okay. So I would have to print out my summary sheet on my estimate template and then manually repopulate it into here for each job that I'm doing.

--- Accounting integrations ---

OZELLA

19:18 Right. That's assuming that you're continuing to do your estimating out of a spreadsheet separate from service?

LEGACY

19:25 Through service?

LEGACY

19:27 Not through service.

LEGACY

19:28 Yeah.

LAUREN

19:29 Can, can you tell us a little bit more about this spreadsheet?

OZELLA

19:32 Yeah.

LAUREN

19:33 Seems pretty complicated yep.

LEGACY

19:35 Yeah. So our estimating spreadsheet is something that we've kind of arrived at after a couple years of iterating.

--- ST app contracts and pricing ---

LEGACY

19:44 And it basically has functionalities baked in that calculate, you know, based on this margin, what's our profit gonna be? We can separate things based on what their cost codes are gonna be. So, like we can have preconstruction as one or, you know, sub contractors as different ones or separate labor in material and break out all these different things in there. But ultimately, everything is a line item in that spreadsheet similar as you.

--- Accounting ---

OZELLA

20:15 Right.

LEGACY

20:17 I think why we're asking about that is, would it be possible? And I guess that's where we're coming from, so.

LAUREN

20:24 Larger jobs. Would those not just go directly into intact, you know, jobs that you're going to potentially create like a schedule of values for, would you not just manage those in intact?

--- ST app contracts and pricing ---

LEGACY

20:37 From an S, main perspective, we?

LAUREN

20:40 No, not the estimating, I think sounds like your spreadsheet. You probably, that is your estimating to is once you've gotten that budget put together, if you're just looking to manage it cost against that on those types of projects with that could be something that those budget to actual, maybe are managed in intact because I find a lot of times with intact customers are sort of like this line that gets, they divide like jobs that are, you know, over they want to get into like really detailed cost code management that they.

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

LEGACY

21:12 Do that?

LAUREN

21:14 And then like the a little bit smaller project jobs they manage in service trade just to ping on some of the requirements of the job.

LEGACY

21:23 Okay. All right.

OZELLA

21:29 Okay. So did we answer your question there?

LEGACY

21:32 Yes, you, man. Yes.

OZELLA

21:34 Okay, great. Thank you.

LEGACY

21:37 I have.

LAUREN

21:38 A question.

OZELLA

21:39 Yeah.

LEGACY

21:40 I know these are a lot of new.

LAUREN

21:42 Accesses and things that you all are kinda thinking through. Would you be open to doing it that way in stage intact?

LEGACY

21:49 Yes. Okay. All right. Okay. Just.

LEGACY

21:54 Checking.

OZELLA

21:56 Right. Okay. So this change order, you can see that it's pending, right?

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

OZELLA

22:02 It's been sent out for approval and now it's waiting. I happen to open it up in my email. So I'm going to go ahead and approve it. I'll go ahead and pop it there just so you can see what that looks like. I can view and respond to that change order. I can say sure, this is fantastic. I love it change away... and... if I could type it out neatly, there we go. It requires you to basically go through all of these checks and balances so that it's official, right? And we're making sure that we know who is approving what, when... and we're approving and we've got approved stamp, we know who did it and we know when they did it.

--- *Quoting* ---

OZELLA

22:55 So now we are squared away on our change order and let me come back over here. Pardon me... too. Many screens open up close. That one. Perfect. So now, once I refresh this screen, the one is no longer going to be pending approval because I just approved it and we'll expect to see that now we have a little check mark and it has been approved.

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

OZELLA

23:22 So that's what that workflow would look like in terms of being able to come in review, a budget, edit an update, a budget, create a change order within a budget, send it out, get it approved. And then you can also review that change order history. So now we have this tab which has been made available to us because we have a change order. It's an external and it has been approved. It's a net change of 2,200 dollars. Any questions on budget management within service?

LEGACY

23:57 Yeah. One question I had... is there a functionality or is it possible to, in real time track costs against the budget?

OZELLA

24:09 So, you want to be able to see work in Progress, right? What are my costs to actual? So that is as we speak, being built into this product, right? So you can see invoiced as you go. But what it's going to look like when we start talking about what the costs are... I'm gonna show you using our prototype here. All right? So, this is an updated view of service trade and what it'll be by the time that you guys are actually live on the platform, right? You'll be able to view a job, see details with extended with an extended module at the top and all. So look at the jobs performance and you'll be able to see that incurred cost and how much has been invoiced against your budget, which is exactly what you're asking about. Correct. Yeah, yeah, you can also do that work in Progress in deeper detail. So you could see when I click in, I'm going to be able to see again how much of my cost has been incurred, how that breaks out between material and labor in hours and dollars, my estimated margin versus actual based on what I budgeted and my invoice dollars... then I can see a summary of the whole job.

--- *Pricing* ---

LEGACY

25:37 Let's just say there was an oops on H back labor standard there, right? And in the budget is 3,000, right? Total committed, 33 52, three columns over four columns over.

OZELLA

25:52 Calls over 33 52.

LEGACY

25:56 1,352 to their left, right, right? Your total committed total encourage.

LEGACY

26:02 Five 32 3,005.

LEGACY

26:03 Sorry, 3,000. Okay. Yeah. Thank you. I can't see you far back.

LAUREN

26:10 Okay.

OZELLA

26:11 I'm with...

LEGACY

26:11 You... but let's just say that there was oops on that. I screwed up. I'm actually supposed to have tripled at labor, right? That's my estimated complete forecasting. Where do I put that in here? Or can I put that in here?

--- ST app contracts and pricing ---

OZELLA

26:28 If you, if you, so, if you budget it incorrectly, is that what you're saying?

LEGACY

26:34 Correct. So, I budgeted incorrectly. I got the now, Jen, it comes to me and says, what are you actually doing out there? It's like oops, I have 9,000 dollars of additional labor that's gonna hit this job that's my estimated to complete the job. Can I put that number in here somewhere for?

OZELLA

26:54 So, it's gonna go, you're gonna make any changes here. So if you budgeted incorrectly, then you would need to adjust the budget, right? So if this job has already been, it's already been established, it's been committed and you need to adjust your budget, you would have to do a change order. And once you do that, then that change would be reflected in your numbers here.

LEGACY

27:18 So you would do a change order with no revenue just fast.

OZELLA

27:22 It would be an internal change order.

LEGACY

27:25 I see. Thank you.

OZELLA

27:29 Yeah. So where was I? Yes. So you've got your summary of services, parts, labor, all that good stuff and you can view by item type. So if you wanted to filter this, you'd be able to say, let me view this summary by labor only or let me view by equipment or materials or parts or what have you, you're viewing in dollars currently? You could also view in quantity. And those are that's basically how this would work. You would also be able to adjust your percentage completion.

OZELLA

28:09 And then that's...

LEGACY

28:10 Just like a ballpark, I think his job is 80 percent whatever.

OZELLA

28:15 That's right? That's right? Yep. So that's how your work in Progress would be managed.

LEGACY

28:21 Got it. Does that 84 percent get factored into the budget in any way? Like can it multiply by my budget be like, you know, this is how I should look or?

OZELLA

28:34 No, this isn't gonna touch your budget in any way. I think the biggest impact here is more a signal for the project manager. You know, where am I, how far am I in terms of my cost incurred? How is it lining up versus what I've invoiced understand when I need to be invoicing for milestone billing and things like that. Those are triggers that we're looking at for the future. But most immediately it's just something that project manager is entering? So it's trackable. So you can do reporting and things like that.

--- Pricing ---

LEGACY

29:05 So under the labor which is 15,677 dollars spent to date. Is there a way we could scroll down and see how many different people have, you know, technicians have worked on this job and what the average, you know, burn is per hour?

--- ST app contracts and pricing ---

OZELLA

29:25 So once you're wanting to drill in to that degree to see the actual technicians, you know, this is definitely a little bit more of a high level view. This is how much labor cost you've incurred versus the actual. And then when you're wanting to actually see the technicians that's where you'll need to come back in here, let me remove my filter and view the job page directly to see hey who has been sourcing time, you know, at different phases in the job. Yeah, any other questions?

LEGACY

30:03 I think we're good.

OZELLA

30:05 Okay. So, so overall, in terms of how you would approach project management, sounds like we have, we've covered it. Is there anything that I may have left out? I'm just thinking in terms of the, as we've talked about job page filtering we have talked about with, we've talked about budgets, change orders.

--- Access to information ---

LEGACY

30:21 Uploading. So metals uploading drawings.

OZELLA

30:25 Yep. Yep. And you can... absolutely, I can do that through the mobile app as a technician and add while I'm out in the field through my tablet or cell phone, whether it's audio photos, that sort of thing. I can do job paperwork in the field attached to the job.

--- Access to information ends ---

OZELLA

30:43 You may have blank paperwork coming out. These attachments actually flowed over from the quote. I can also add attachments from the office... and they're all dated. So then that also contributes to that filtering. So let's say you're a month in and then you say wait where's this attachment?

--- Assets ---

OZELLA

31:04 It should have been added week one, you know, let me look back to last month and see what attachments were put in when they were added, that sort of thing... you can add them, you know, specifically to a service. I can come into this particular service and go ahead and add my attachment from here as well.

--- Assets ends ---

OZELLA

31:30 All right. Well, Warren, I'm gonna hand it back over to you where I'll square on question. Yeah, I guess my question before we get into the accounting.

LAUREN

31:39 Staff which overlaps a little bit with this is how do you think aligns with your expectations of being able to do your project management?

LEGACY

31:53 I think for smaller jobs.

OZELLA

31:55 Be...

LEGACY

31:56 Applicable. But for some of the bigger stuff that we do, we would definitely run into some challenges?

OZELLA

32:02 Yeah, that's...

LAUREN

32:03 Probably fair. I think.

LAUREN

32:05 Think that's what Tanya was getting at earlier. Like some, our customers will use service trade to do like the project stuff on the smaller end. I know Ozella touched on that as well and then truly manage the big projects in their accounting system. So that might.

LAUREN

32:24 That may be as good of a time as any to transition?

LAUREN

32:26 Over to you, Tanya?

LAUREN

32:28 Do you have stuff you were gonna share? Do I have some slides? Okay? You already?

OZELLA

32:34 You...

LAUREN

32:35 Guys hear? Is it?

LAUREN

32:36 Can you hear, Tanya? Okay?

LEGACY

32:38 Yes, cool.

LAUREN

32:39 We're sitting right next to each other?

LAUREN

32:41 I mean, my own office.

OZELLA

32:44 I noticed that and I was like that's exciting that you're both in the office that's so cool. Yeah.

LAUREN

32:50 Okay. So let me share my screen.

LEGACY

32:52 Here.

LEGACY

32:57 All right.

LEGACY

33:03 Right.

LEGACY

33:08 A pro.

LEGACY

33:09 Okay.

LAUREN

33:12 Sorry, just trying to have, I think there we go. There we go. Perfect. Okay. So service trade, I wanna talk a little bit about you guys and you guys are evaluating intact. And I saw the email from Nick this morning that you guys were wanting to basically see this.

--- Accounting ---

LAUREN

33:28 And so I'll send this over to you after we finish, but these are high level the touch points that we have with Sage intact. So in service trade, you've got companies that map to customers. And then in service trade, we have locations which could connect to either a child customer or a contact, and then jobs to service trade, jobs can be set up as a project or jobs inside of intact.

--- Invoicing ---

LAUREN

33:54 And then on the revenue side invoices can sync over as an invoice. And then if you do billing and you wanna do that at a service trade that the occurring can sync over as invoice. Now.

LEGACY

34:07 In real time, right?

LAUREN

34:10 Yes, it is all in real time.

LEGACY

34:11 Well, we'll talk about that.

LAUREN

34:13 You can either push. So with the invoicing, you can either say I finish the invoice. I wanna click and send it now or maybe somebody else is gonna do a final review and you want to then review them all and send them.

LEGACY

34:22 All at that time, but yeah.

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

LAUREN

34:25 Click the sync or you set up a customer, it syncs to intact... vendors. If you're doing the, so the purchasing side vendors will sync and then we will walkthrough the purchasing process, but the purchase orders once they're received that receipt comes over to intact has like a receiver, it's transaction that will sync to, so that it sits there until the ap invoice comes in.

--- Parts management (inventory) ---

LAUREN

34:50 So you've got something to match to. So it knows where to direct that cost. And then inventory transactions. Are you guys doing inventory?

LEGACY

34:58 No, but we're going to be, we do it on excel at the warehouse, but we want inventory by truck and also like, you know, train yards, and we have a low I office and stuff.

LAUREN

35:09 Okay, perfect. So we can track inventory. So you would set up your inventory service trade, you know, inventory gets moved to a job, it gets cost to the job. And then a journal entry comes over. So service trade is really like is your sub ledger detail but we keep all the balances and sync with what's an intact. So you run a balance sheet, you see your inventory. You can choose to see whip if you want to show inventory move that it's moved out of inventory, but it's on a job that the job is not finished or it can go directly to cost to sales. And that's just part of the configuration when we do implementation.

--- Accounting ---

LAUREN

35:44 So how this flows just a diagram wise. There's actually lots of different workflows. This is something that during implementation, we really sit down and understand what your workflow is. And then we can also do a lot of customization, you know, setting the mapping rules for different things like maybe only certain customers sync over. You know, I don't want Construction customers thinking over. There can be all sorts of rules that we can put in place between intact and service trade. So sales tax is always a big thing. If you have to calculate if you're charging your customers sales tax. And so different companies have different, you know, may decide they want to run sales tax reports on a service trade. And they're like, no, I'm doing big Construction jobs that also require sales tax on all about sales tax. Out of intact, we can do it either way. Again, that's something that we work through during implementation and just, you know, determining what that workflow is gonna look like. So if intact is you're like master record of truth, you would, you could create an accounting maybe wants to create the control of the customer because they wanna make sure like the right sales tax signed. You know, any other pertinent pieces of information or capture? Then this is one workflow, you create the customer intact. It syncs over, creates a customer and service trade. You create a location in intact. It syncs over and creates the location and service trade. Then service trade, what it takes over, you have a new service job. You create that service job in an intact at the service trade. At that point, you may say, I want that to create the job and intact, which usually is what happens I find with Construction folks is that they want that job immediately to come over the cost like payroll and different in hit it or they wait till when you create the invoice. And at that point, the invoice creates the job. So again, that's workflow that we go through upon implementation. Now, an alternate workflow could be service trade from the master. Customers are creating service trade jobs or locations are created, service trade, jobs are creating service trade. The invoices are created service trade. And depending on the choices you make during implementation, it will determine when those things sync over to intact. But again, they will sync automatically. So I create a customer and service trade, it sends it over to intact, creates the customer. And then it writes back to service trade. What is the Sage intact? So questions on that.

LEGACY

38:11 No.

LAUREN

38:13 So let me show to your question about like is it automatic... Zoom stuff out of the way? So this is our configuration screen in service trade. There's an account set up. This will be something we walkthrough during implementation, you know, making these selections. We also have the ability way down at the bottom to come into advanced settings where we can, if we determine when, you know, you're like, well, I have some really specific rules on how I want things to map over to departments and intact.

--- Invoicing ---

LAUREN

38:44 Then we understand those rules. We write a custom mapping and then it writes over based on that. So an invoice once it's processed through intact, it gets its process. TAM. So if I start off and I've got an invoice that's in the okay status, I would, you know, click my, send my invoice to my customer gets, you know, this invoice with my logo and this great link that they can click on to view all the service details with the pictures and the recommendations. And then the user, once they've sent it out, they click send to accounting. And then that's when it goes to intact. So this is the choice that you guys would make as part of your, you know, standard operating procedures is, do I, after I create this invoice, click send to accounting?

--- Implementation and ongoing support ---

LAUREN

39:35 Or does Lauren need to look at it? And Lauren is gonna send them all at one time. So that's just sort of standard operating procedures. You guys will decide when you're going through implementation, but you have the option to do either.

LEGACY

39:46 How is the accounting date decided? Is it a, is it decided by the invoice date? Or is it decided by?

--- Invoicing ---

LAUREN

39:57 So, a good question that's something that you determine. So what should the transaction date be? Do you want to be the service trade invoice date, which is what most people pick? Do you, is it the transaction date sent to impact is the appointment date or is it some other custom logic that you want to define? But that people just use the service trade invoice date as the transaction date, which is, becomes the accounting date.

--- Invoicing ends ---

LEGACY

40:21 And we can decide that invoice date. It doesn't have to be today's. Date. It could be last week's, date that I could do from today.

LAUREN

40:30 Can, so when you're you can come in here and say, well, I want to change it defaults to the day you're billing it, but you can come in here and say, no, I need to backdate this to the four.

--- *Invoicing* ---

LEGACY

40:38 Right. Okay.

LAUREN

40:46 Okay. So once my invoice is processed with intact, we have this history tab which I as a former controller absolutely love because it looks, it's sort of all the truth of what's going on with the invoice who touched it, who changed it when it was sent to? Intact? I see it was submitted. I see, you know, literally a minute later it was processed by the accounting system. It would also show if I had sent the invoice link out and it would show if the person I sent it to opened it would show all the history of the invoice. So, which is really nice.

LAUREN

41:21 Sorry. Was there a question there?

LEGACY

41:23 No, no, that's good. We don't have that right now. So you don't know who's done what on anything. So.

LAUREN

41:29 Exactly. Exactly. And so with service trade, you know, with invoicing, I can, as I was mentioning, I can click the button to send it one time or if maybe in my other example is, you know, Lauren is going to review them all. Well, I can pull up all the invoices that are in okay status. And then I get this list of invoices. I can select them all. Click this little gear wheel and say, submit to accounting at one time. And then that whole little batch just processes over to intact at one time.

--- *Quoting* ---

LAUREN

42:00 I also like this because if jersey Mike's calls up and says, hey, can you resend all my invoices even though we know from the history, they've been opening them, we say.

LAUREN

42:08 Sure.

LAUREN

42:09 And we can select them all and click send a customer. And then off it goes re, emailing them to the...

--- Parts management (inventory) ---

LEGACY

42:15 Nice.

LEGACY

42:19 Now.

LAUREN

42:19 The other piece of our integration is some of the purchasing. So I'm gonna re share the slide show here. So, you know, things will happen in service trade that, you know, intact is not gonna know about until we want to, you know, really impact for some of a lot of the service is really just our general ledger.

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

LAUREN

42:38 It's where I print my check. It's where I receive payments for financials. And so we'll do purchase orders for service jobs in service trade. And then so I can create a purchase order. And then once I received that those materials that receipt syncs over to intact as what intact calls a receiver.

--- Parts management (inventory) ---

LAUREN

42:57 And so the receiver sits there with the coding, it knows what job it goes to. And then you get your payable in the mail or in the email and you match it to that receiver. Now, eventually when you start to do inventory, this is where we can start passing transactions over. So we can use, we can go through whip which some folks have done in the past or wanted to do in the past. Others like, no, when I move material to a job, it goes, I want to be cost Ed, right? At that point. So again, that would be something that, you know, during implementation, we would say, are you gonna use whip? If you see it goes to a whip account? And then when you close the job, it moves it out of whip and it goes to cost of sales or direct expense. Versus if you did not use a whip to pass through, it would go directly to cost of sales. So just a choice you have... now service. Now, this is obviously full blown inventory management. We're attending the general ledger service trade. If you want to kind of step into inventory within service trade, we can, you know, as you're logging in, let me go back to jobs. And I think that got some part so we can create a database of items like there's a water heater here. So the tech can, you can upload a list of items. The tech can select the item. It can be there with maybe a unit cost, that unit cost could be used to, you know, for billing purposes that the tech can, you know, pick from a list of items. They can even reference what source it was because service tray can also produce just like lists of saying, this is what was used. This is what came off of truck number seven that I need to replenish this week. So, you know, from going from, sounds like you're already using a spreadsheet to maybe go into the next step, maybe just having some standard items that the tech can select from and being able to pull lists every week of what materials were consumed for replenishment purposes can be potentially a second, you know, next step. And then when you're ready go into like full blown inventory tracking.

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

LAUREN

45:06 So that's really my overview of the intact integration we have about... I would say overall, we've got a lot of intact customers. So we've been partners with intact for about seven years now before Sage purchase them. And then Sage purchased them like in 18 or 17. And so we've been partners with intact for quite a while.

--- *Accounting integrations* ---

LAUREN

45:29 And so we've got about 30 customers. Some folks run, you know, run a, an integration that partners written for us. We've got our own native integration that we talked about today. And we've got about almost close to 20 customers running the Sage intact integration right now. So it's been around a while.

--- *Accounting* ---

LAUREN

45:53 Janet, I don't think any of the references we provided use our Sage intact integration with service trade because they have different accounting systems that if you'd like a reference, I'm sure we could arrange.

LEGACY

46:04 Definitely. Okay. That'll be good. Yeah, I think Chris is going to be talking to some of those references that you.

--- *Accounting ends* ---

LAUREN

46:12 Yeah, Katie sent those over earlier today. Did you guys get them? Okay?

LEGACY

46:17 I've been in meetings all day, so I haven't looked at my email, so I would assume.

LAUREN

46:22 Okay. Well, okay. That's fine. And then we didn't send the contact information for Nick over at south land because Chris said he personally knew him. So just, we need to do that.

LEGACY

46:37 Yeah.

LAUREN

46:37 I assume he can just call us all.

LEGACY

46:40 Exactly. You can get to them right away?

LAUREN

46:43 Okay. Yep. Well, was that helpful? Did that answer your questions related to project management and the Sage intact integration?

LEGACY

46:53 I think so. Yes.

LAUREN

46:55 Okay, great. All right. Well, I know we have some pricing that we're going to go over with Daniel.

--- *Purchase decision* ---

LAUREN

47:01 Janet, any thoughts from you on how ServiceTrade might fit in with your business now that you've seen a little bit more of?

LEGACY

47:10 I think especially on the service side, it fits really well and stuff like that. We just have to put the pricing to, you know, compare that seeing we're gonna go, you know, like if, how many we want on service trade versus, you know, impact and so forth.

--- *Access to information* ---

LAUREN

47:28 Sure. Sure. Well, the nice thing about service trade is the field users or anyone with the mobile app are the only ones that really need a paid license. Everyone else that would use it from an admin standpoint, like you guys are overhead. So we don't charge for you.

--- *Access to information ends* ---

LEGACY

47:46 Yeah, that's nice. I appreciate that.

LAUREN

47:48 Yeah, of course.

LEGACY

47:51 We're usually in the accounting department cost the company money. We don't make the most. So, I'm always talk.

DANIEL

47:59 It's the same way we just spend money. We don't make money, right?

LEGACY

48:04 Exactly. So.

DANIEL

48:07 We're in the same boat.

LEGACY

48:09 Yeah.

LAUREN

48:11 I can't say, I know what that's like... on the side of the house.

--- *Dispatch* ---

LAUREN

48:17 Well, great. Speak now or forever hold your peace until we next get on a call. Janet and Joe and Daniel, anything else from you three?

LEGACY

48:28 I think we're all good.

LEGACY

48:29 Yeah, I think we're good. Thank.

LEGACY

48:30 You...

LAUREN

48:31 All right. Thanks you all. I'm sure Daniel will keep us posted on what the next steps are from our perspective with you, but Daniel, if you wanna hang around... we can go over the rough pricing that Katie and I pulled together.

--- Dispatch ends ---

DANIEL

48:45 Yeah, that sounds good.

LEGACY

48:47 Cool. Thanks you guys.

LAUREN

48:49 Thank you. All right. Let me get my screen up. Okay?

LAUREN

49:01 Give me one second. Let's see. Okay. Can you see my screen where it says subscription order form it?

DANIEL

49:13 Yes.

LAUREN

49:14 Okay. All right. Great. So, this is our first pass at it. Our deal desk hasn't even seen this, but we wanted to kinda walkthrough what this was since there's a lot on here... before we send it over for your review.

DANIEL

49:30 Okay.

LAUREN

49:31 So, the way I base these numbers was how service trade functionality works and the quantities that you sent over to me. Okay? I guess I could pull up that email to have as a point of reference. So, let me see.

--- Access to information ---

LAUREN

49:55 Okay. So, what we assumed based on this, assuming you can still see my screen?

DANIEL

50:01 Yeah.

LAUREN

50:03 We, we lumped your 35 service techs, six supervisors, three Construction supervisors and six project managers into the technician licenses. We wanted to get your thoughts on that because... those to us. Seemed like the people that would need access to the mobile application.

--- Tech time tracking ---

DANIEL

50:30 Yeah, I think so. I think that's right? Like I said, the 19 Construction text, they would need access to the time sheets only, right? That's the other big piece of it.

LAUREN

50:42 Right. And then are these technician users as well? Needing access to the time sheet, the?

DANIEL

50:52 Me...

LAUREN

50:52 Maybe some, but not all.

--- Access to information ---

DANIEL

50:54 Yeah, possibly, right? I think it depends on some of those Construction supervisors and regular supervisors. They're probably they, yeah, they are because they need to charge their time to the projects too. Okay?

LAUREN

51:06 Okay. Okay. Well, then that's exactly what I did. So what we did was 50 mobile app licenses for the technicians or people requiring mobile app also included 19 of the helper licenses.

--- Pricing ---

LAUREN

51:26 This helper license is limited to literally like three things. They can see their schedule. They can log their time to the jobs and they can like add attachments and that's it. So they get a reduced rate since it's pretty limited functionality. We have the helper licenses for that.

--- Tech time tracking ---

LAUREN

51:48 I went back and forth on this service time card. But since Janet really liked the submission process, the submittal process to the time card that's what that is, where the text would review their time once a week, check that they've reviewed it and then submit to their manager.

--- Tech time tracking ends ---

DANIEL

52:06 Okay.

LAUREN

52:07 To use that, but I think it's nice to have that sorta check some balances. And... yeah, I think Todd mentioned that would be helpful as well. So we popped that in there... questions so far.

DANIEL

52:24 No, no, it makes sense. Okay. Follow in.

LAUREN

52:28 Yeah, it's different because we just have so many like products. So you can kinda curate what Legacie's experience will be so Northboundary, which was what Chris brought up for the sales team and selling those preventive maintenance agreements. We just charge per office for that. So you get up to five salespeople, which I think you have three sales reps.

--- Parts management (inventory) ---

LAUREN

52:53 So you're well within the range for that. And then Janet just brought up how parts management was important. So we included partsledger on the subscription as well. We didn't include any warehouses because you guys weren't tracking inventory yet... because you can use partsledger to not only do the parts purchasing, which is what this line item is for the mobile users, but you can also track parts in each individual brick and mortar, warehouse and mobile warehouse AKA a truck. So...

DANIEL

53:30 That's that's that line item.

LAUREN

53:33 We, we didn't add any warehouses just because we didn't know if you guys would want to that on your RFP, I believe it was like a phase to kinda.

DANIEL

53:42 Yeah, you're correct? Yeah. Okay. Yeah, I think they want to do it, but I think it's like we gotta get all this other stuff done first before we start doing warehouse and truck inventory management.

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

LAUREN

53:53 Yeah. This is a lot to kinda consume right off the bat. So, these were things that you all expressed interest in. So we wanted to give you sort of a baseline. I'll kinda defer to you on what you think would be the right product or products for the team to start with at the beginning?

DANIEL

54:16 Yeah, no, I think all of that stuff is there. Like I said, I mean, the, I know, Chris, you know, that was the first time I've heard about northern boundary. So, you know, that'll be his choice so that he wants to, yeah purchase that piece. So what? Yeah. So northern boundaries, the only thing we don't have to buy right? For server, right? That's a standalone system. Is that correct?

LAUREN

54:42 I mean, you don't have to buy any of it. Yeah, Northboundary dot stand alone, but it will be really tightly integrated with service trade. I think this, I think Northboundary was what Chris was like. Well, we're not really an early adopter. I think he was talking about Northboundary being integrated with ServiceTrade but Northboundary itself is not a new product but it could stand alone.

DANIEL

55:03 Okay. Yeah. I mean, like just from, like I said, for our core stuff, our technicians, you know, doing all the things that we talked about... that you demoed and stuff that, that's what all these licenses are except for northern boundary that's right? Yeah, right. All the things that we've seen. Okay. And then... how does Installation work pro services further down?

LAUREN

55:36 Yes. So it's a flat fee based on the number of technicians. So there is or.

--- Implementation and ongoing support ---

OZELLA

55:46 Porting for both.

LAUREN

55:47 Northboundary and partsledger but they're pretty small. So, so the big piece of that would be the 11 five for the account set up and data migration. As we talked in the office, the you'll get a dedicated project management team from service trade including a project manager and a project coordinator, and then their manager that oversees them. So that includes the actual importing of data and kind of the account set up as a whole and the training as well. So that's kinda all included there.

DANIEL

56:26 Okay. So... what about... I know there was another thing that we, I think you guys showed where it was like, you know, you can purchase so many hours or something like that. What was that?

--- Implementation and ongoing support ends ---

LAUREN

56:48 He didn't do that. I'm glad you brought that up because we didn't put that on there. Let me see service trade, Cal... account manager. Here we go. So there's really three levels of this. I know why I didn't put it on there because I actually was thinking about this and we do this thing and I can't remember if we only do it for existing customers or if we do it for new folks as well, but not that it matters.

--- Implementation and ongoing support ---

LAUREN

57:18 We can do, you know, software is just words and numbers on a page like whatever or whatever to make this the easiest transition as possible but we have this thing called taste of TAM, our technical account manager. So I think you get like three months just on the house.

--- Pricing ---

LAUREN

57:34 And then if you like it, you can kinda sign up for whatever level that you want. I think we can probably include that in like your first like three months and then kinda lock in a rate for what you think you might need down the line, whether it's two hours a month, four hours a month, eight hours or even more probably most people are on the four hours a month range.

DANIEL

57:57 Okay. And that's 60 that prices per year, right? For four hours per month per year? Okay?

DANIEL

58:12 Yeah. I think we definitely, I definitely think we would need probably more help obviously in the beginning and I think it would probably tail off after that, right? So I think like I think that level of consultant would probably be at least year one.

--- Purchase decision ---

LAUREN

58:30 Yeah. Well, I can add it. So you have sort of a sort of a baseline, we can add it to the top here. I'm curious to know sort of how close we are to what the team's budget is, if you're willing to share.

DANIEL

58:47 I have to compare it to the other one because we waiting for updated pricing... from BuildOps actually. So... I should have all that stuff.

LAUREN

59:02 Okay. Well, I'll need to put this through deal desk and this doesn't include any sort of discounting or anything... in order to kinda start having those conversations internally. We kinda need to know sort of a rough time frame of when you guys are looking to make a decision. Do you have an understanding of that?

DANIEL

59:25 Yeah. Yeah. Chris wants to make a decision this week.

LAUREN

59:28 This week. Okay. That's pretty aggressive. Okay?

DANIEL

59:32 Yeah. Well, we not in his mind, he wanted to make a decision weeks ago, just we just have to get through all of these meetings and stuff, right? And make sure we understood, got all the right people comfortable. But I mean, I think the point here is like they're ready to move forward.

LAUREN

59:49 Sure.

DANIEL

59:50 Once everything's correct, you know what I mean? Like once they got the right right fit, right? Budget, there's nothing stopping them from moving forward.

LAUREN

59:58 Yeah. So... are you willing to be candid on how you think service trades, projects and integration stuff aligns with what you guys are expecting?

--- *Purchase decision ends* ---

DANIEL

1:00:11 Yeah. I think from the demos I've been on, I would say that the project management piece is really light, right? Like it's you know... probably not.

DANIEL

1:00:29 What's the right word? You know, they probably wouldn't use that part. I think it's you know, it's too basic for what they wanna do just because of the questions I've heard asked and the other products that had a little bit more where a little more Rich with the features from it when it came to project management, project, right? That were not part of impact, right? That were just part of the SM, yeah.

LAUREN

1:00:57 Sorry, go ahead.

DANIEL

1:00:58 Yeah. So I would say that that's probably the biggest piece, right? You know, depending on how important that piece is, you know, for the overall decision, I have to get that feedback from Janna and then what their thoughts were. Yeah. But from my view of seeing both products, your product was definitely really light on that.

LAUREN

1:01:21 Yeah, I think that's fair that's a sort of purposeful decision that we've made is not to venture too deep into heavy Construction territory because then we're meeting with our partner pro core and that's not super advantageous for us. But yeah, I think that's fair. But otherwise, how does service trade compare to BuildOps?

DANIEL

1:01:48 Like I said, before, I think you guys both have like a different... the user interfaces are different and not in a bad way, right? Like I think like there's some stuff that I like the way how your flow works of your product. And I have some stuff I like some stuff that they do with their software. So, I, you know, my suggestion as well, you know, to the team was... I don't think either solution you pick is you're going to have buyer's remorse, right? So like I think both, you guys make a great product and both products are well thought through. And just my experience in this with these two, you know, going through the demos and stuff. I haven't seen any red flags on either side, right? Like, I feel like, you know, I don't feel like one, is this much better than the other one? I think like both of them solve the problem. I think it's gonna come down to, you know, the whole group voting and then obviously the, you know, total cost of ownership of this thing.

--- Pricing ---

DANIEL

1:03:01 What is it gonna cost? You know, per technician? And then, you know, implementation, I don't think implementations are problem is your guys implementation seems pretty fair. So I think it's really going to just come down to the total cost of ownership, right?

LAUREN

1:03:19 There's a few levers that we have to be more competitive on the pricing. Obviously, a decision this week is super compelling and we can, you know, see what we can do from that perspective. But we also have flexibility on rates and things for multi year agreement. I wasn't sure how willing you all would be to invest in a two or three year agreement, but we can certainly, we can certainly be more competitive in that sense.

DANIEL

1:03:53 No, absolutely. So. Yeah, that was one of the things that we would love to see, you know, if there's a, if there's a big break at doing a three year commitment... Chris has definitely asked me to make sure like, you know, is there a difference between just, you know, a 12 month commitment versus a three year?

--- Purchase decision ---

DANIEL

1:04:10 So they definitely would be interested in a three year if that meant, you know, deeper discounts and stuff like that. So, okay.

LAUREN

1:04:22 How far off are we from BuildOps?

DANIEL

1:04:26 I don't know. I haven't got the revised pricing yet.

LAUREN

1:04:30 Okay. I have that. So, you know, I have to.

--- Purchase decision ends ---

DANIEL

1:04:34 Yeah... yeah, yeah, yeah, no, I'll definitely, you know, give as much guidance as I can like end of the day too. I have to present it to Chris, right? For him. You know, I'm just kinda the organizer of the work, right? So like once he, you know, we have like a kind a side by side comparison that shares is gonna put together where we'll show, you know, this is the cost.

--- Pricing ---

DANIEL

1:04:58 You know, this is what we're getting. You know, this is what install cost. You know, this is, you know, they're giving us this, you're giving us that, right? Like all of those kinds of things will all be outlined in our kind of a comparison for them.

LAUREN

1:05:17 Well, we can put together some three year and some one year pricing to have just sort of as a comparison.

--- Pricing ends ---

LAUREN

1:05:28 I have to be honest with you. I took the red eye here to the east coast this morning and I think I'm about to hit a wall. So... is it okay if I get it if we get something to you first thing tomorrow morning to give us time to connect with deal desk and?

DANIEL

1:05:43 Yeah, for sure.

LAUREN

1:05:45 All right. And then, did you know when Chris was planning to go down to San Diego to meet with a red?

DANIEL

1:05:52 I wanna say that's happening now? Okay. Interesting. I'm not 100 percent, but I swore when I talked to him last week, I thought he said he was gonna be in San Diego.

LAUREN

1:06:06 Use the dates then because I've been on the road for so long, I don't know.

DANIEL

1:06:12 Yeah, I think he's probably there now absolutely.

LAUREN

1:06:16 I'll be interested to hear how that visit goes.

DANIEL

1:06:19 Yeah. Yeah. Like I said, you know, I mean, like from the notes and all the stuff that he shared with me. You know, I was obviously, you know, they're very fond of your guys. So I mean, it was a strong recommendation.

OZELLA

1:06:31 Yeah, you know?

LAUREN

1:06:33 What it is, Jamie is so sales focused which kind of aligns with our sort of approach, you know, with our, you know, deficiencies and quoting and north, our acquisition or boundary like she's so sales focus which is like super aligns with what we do. So it's not surprising that they love us.

DANIEL

1:06:52 Yeah. And I think when you do, when you send over the final numbers, like I would just have like a section of like, you know, here's the core system here's, all the things that you know, we heard you guys need. And then here's optional items, right? Like Northboundary, should be optional, right? You know, the other companies not selling Northboundary, you don't want to be, you don't want to look more expensive.

LAUREN

1:07:14 Yeah. Yeah, yeah, I think that, so we'll definitely take that into consideration.

DANIEL

1:07:19 Yeah. And I think you should show it because obviously, you know, he really liked the software so that, you know, if he sees that like, wow, maybe I want this now, right? You know, I mean, that might help you guys, but I would just keep it separate so that way you kinda can see, okay, if I don't do Northboundary, you know, this is what you guys software cost. Yeah. Okay. Cool. We didn't have that in any of the RFP or anything, right? Yeah, added bonus since you guys own them. Yeah, yeah.

LAUREN

1:07:49 All right.

LAUREN

1:07:50 Well, we'll get to work on this probably in the morning but maybe a little bit later after I get some food, but I appreciate all your insights and helping us coordinate and then we'll send it over and maybe I'll give you a call tomorrow afternoon just to confirm receipt and then get any other insights that you might have that could be helpful.

DANIEL

1:08:10 Okay. That sounds good. All right. Cool. Thank you. Likewise. Thanks so much talk to you later.

LAUREN

1:08:17 All right. Bye for now.

The End