



# ServiceTrade/Acumatica

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## Participants

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# Transcript

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SHANNON

0:00 Hey girl.

TANYA

0:01 Hey, Mike.

SHANNON

0:02 Sorry, I thought I would be five minutes late but I got done quickly.

TANYA

0:07 Nice. Is that your bunk room and your beehouse?

SHANNON

0:10 It is, it is, this is the, this is the boy's bunk room and you can see, you can see we've got three bunk beds on each side.

TANYA

0:19 Two or three. I like the three my.

SHANNON

0:22 Yeah. So it's six and this is the boy's bunk room. And then on the other side of the house, we have a pink purple and teal one that's the girls bunk room.

TANYA

0:31 Nice. My, we have a place in the mountains and we have a bunk room, but we only have it's two sets of built in on either side and my daughter wants to bring friends up and she's got five and she's like, where is it? And I was like we only had three, we can do that.

SHANNON

0:45 Yeah, we...

TANYA

0:46 We, we...

SHANNON

0:47 We, you know, of course, we built for the future in mind. Our kids are 26, 22 and 19, so we haven't necessarily started poking them yet and saying, get on it, but, you know, at some point, hopefully they'll figure out how, first of all, hopefully they figure out how to marry somebody and then they figure out how to have children.

TANYA

1:12 A...

SHANNON

1:14 Let's take baby steps to the correct spot.

TANYA

1:17 Yeah, exactly. Exactly. So you're back at selling Accumatica and a strategies group.

SHANNON

1:24 And a strategies group. So, yeah, full circle start. Yeah, I started here in 97. So it's...

TANYA

1:32 Hi, is that, how do we get? How do we become so old?

SHANNON

1:37 I know, I'm like 54 and I'm just like this is, it's kinda ridiculous.

TANYA

1:46 So, how is Accumatica going? I mean, I feel like we're hearing more about it lately? I mean, I feel like sort of deadene by intact, but now, I feel like it's kinda back again.

SHANNON

1:56 Well, here's what I'm... my opinion entirely. Somebody may have a completely different opinion. I think that Sage did a fairly decent job of freezing the market... to try and hold off their customers going somewhere else before they have intact ready.

TANYA

2:25 Yeah, yeah.

SHANNON

2:28 However, so just in the past week and a half, I've met with three Sage customers already... matter of fact. I'm talking. I'm I know you're you've still got good buddies at alliance, so.

TANYA

2:48 Yes, but I don't really, yeah.

SHANNON

2:50 So, I've got 150,000,000 dollar GC in Florida that I'm talking to that is a customer of... our friends. And, they said, we just spent, you know, three hours going through intact and she the CFO, she said, I could tell in 15 minutes that this isn't ready for us.

TANYA

3:20 Yeah.

SHANNON

3:21 And I mean, for, if this was some sort of, you know, new clear specialty contractor that had all kinds of funky subcontracting and all that kind of stuff. I would say, yeah, I'm not surprised. But, I mean, how hard can we be, you know, and it's not like they're building some kind of specialty facilities. I mean, we're talking about a pretty typical education, you know, education and retail and that kind of stuff contractor. And, she just said, she said it's she said the payroll is really weird. She said, I'm not comfortable with that. She said the way they're looking at billing is really strange and she said, I just don't and these folks are really heavy pro, core users... and have been for many years. And she said, I just, she said, I just don't think it's I don't think it's there yet. It's not ready. So, they went through, they went through an entire evaluation process with another Accumatica partner. And then, and then they're really good friends with one of our largest customers and our large customer recommended us to this company and this.

--- Purchase decision ---

SHANNON

4:52 And so they contacted us and said we've already been through the demo process. We're ready to buy. We just want to evaluate you, as the partner to do the implementation and we're ready to.

TANYA

5:03 That's awesome.

SHANNON

5:04 So, I think, you know, I think the, and when I said that, I think Sage kinda did a good job, a decent job of freezing the market.

--- Purchase decision ends ---

SHANNON

5:17 I think they also shot themselves in the foot because they did so much of a marketing effort to say that intact was coming and that it's going to be ready, I think

all they did was set off the alarm bells to these companies and the companies are saying, well, if we've got to change systems anyway, let's go ahead and take a look at what else is in the marketplace. And I mean, if you're pulling up an Accumatica who's basically three years ahead of all the crap, you know, I mean, you know, how painful the first two, three years of Accumatica was?

TANYA

5:54 Yes.

SHANNON

5:57 It's like, you know, they're kinda shooting themselves in the foot because people are coming and looking at Accumatica and I haven't lost a deal to intact yet. So not one, which is pretty interesting.

--- Accounting ---

TANYA

6:14 Yeah.

SHANNON

6:15 So, and, you know, I'm not trying to be braggy about it.

TANYA

6:19 No, I mean, you know, Accumatica is a very Rich product. I mean, you know, there's just there's things I like about impact the, how the report writing works. Like as an accountant, I really like about impact, but there's things that I don't like about it the way it's like a Sage, they have to, you have to have all the cost codes set up before you can put cost against it.

--- Accounting ends ---

TANYA

6:39 I mean, which is a pay in the, but, you know, I sort of just being able to cost to it. Just silly things like that. And, you know, I've been away from it for two years. I mean, we have an integration with it. So I touch it, but I don't have the INS and outs of it and, it doesn't seem like it's progressed but hasn't really deeply progressed.

SHANNON

6:58 Yeah.

TANYA

6:58 On some of the things.

SHANNON

7:00 So, the last three months that I was at a signar, our internal integration team was building the integration to.

TANYA

7:11 Yeah.

SHANNON

7:13 Okay. And, and of course, we've had our integration to intact for two years, I mean, to Accumatica for two years... and we had to, we had to basically build things in a signar, to make up for the pieces that weren't in the, in intact to make it so that we could even use an integration.

--- Assets ---

TANYA

7:42 Wow.

SHANNON

7:43 Okay. First of all, not only as, you know, in Accumatica where you've got system equipment that's like basic of basic where you could put a piece of equipment, you can put in its rates and you can tie it to a fixed asset that's basically, it, yeah, that does not even.

--- Assets ends ---

TANYA

7:59 That doesn't that doesn't exist at all. Yeah, great.

SHANNON

8:02 Doesn't I mean, it doesn't exist at all. So, I talked to Jeff Williams out, you know, at say they're probably to me with all the people I've talked to say seems to have the intact figured out better than any partner I've talked to.

--- Accounting ---

TANYA

8:21 Really?

SHANNON

8:22 And matter of fact, Colby tells me that say, has sold more than any partner as far as intact goes really. And Jeff Williams told me, he said Shannon, we're creating equipment as an employee.

TANYA

8:41 My God.

SHANNON

8:43 And they're giving it a, they're creating a class called, you know, they've got their classes of salaried employees, field hourly employees, and then we've got a class called equipment.

--- Accounting ends ---

TANYA

8:59 My God.

SHANNON

9:01 And he said that's the only way we can do it.

TANYA

9:04 What did you see that Sage announced they bought koran?

SHANNON

9:09 Yeah.

TANYA

9:10 Which I wonder which I would think would piss off pro core a. And then B, does that mean that that's gonna, you know, they're gonna stuff that in there somewhere, you know, I just, I thought that was interesting.

SHANNON

9:23 So, so, are you somewhat familiar with a site?

TANYA

9:30 Vaguely, I don't know the name.

SHANNON

9:32 Okay. So, a site there's a guy that used to be with ibs, one of the acumetica, development partners. Okay? They did the property management solution for Accumatica.

TANYA

9:46 Okay. They...

SHANNON

9:46 Did the cash base, they did the cash basis accounting for Accumatica. The guy, Dan layman, that was.



TANYA

9:55 I know Dan, yeah, yeah. Yeah. He was over at American Maxwell. Yeah.

SHANNON

10:00 Okay. So, and, you know, the other guy from Allen drum?

TANYA

10:07 Yes. Yeah. He was my boss for a little bit.

SHANNON

10:10 Okay. So, they are both now with a sit and sit, if you've never seen a site as it is from Europe. So, it started in Germany and the UK.

TANYA

10:23 God.

SHANNON

10:24 They brought it to the us a year almost two years ago, and, let me tell you. They are kicking pro core as all my gosh, I just sat in a meeting with them for an hour yesterday. That product is fantastic and it is half the price of pro core and we were talking about Sage. Yeah, I said, so, they have a full, they have maybe the best integration to Accumatica that I've ever seen in a product. You literally can use the entire site product in the acumatica dashboard... and everything is integrated. I mean, they have everything and the, and it was beautiful because as I took the, they took the advice of a lot of people and said we're gonna turn off our financial application. And when we sell to an Accumatica customer, we're gonna tell you all the financial transactions are done in the accounting solution. We are only the project management documentation collaborative.

TANYA

11:35 Yeah, yeah.

SHANNON

11:36 And because that's the thing, pro core was constantly pissed at me because we'd have a customer that was paying pro core 100,000 dollars a year for procor. And I would go in there and I would show them Accumatica. And I would say save yourself 25,000 bucks and turn off the financial piece of procor and just use Accumatica because you can just pull them both up on the same Chrome and just have two tabs, one pro core, one Accumatica tab.

TANYA

12:07 And...

SHANNON

12:07 Have all your information and broke sales, people would call me and say, what the hell are you doing? Man? I'm losing business and I'm like, hey, don't sell it to them. The only reason you built the financial piece is because of people's crappy accounting systems that they've been using for 20 years that didn't give them web access.

*--- Accounting integrations ---*

SHANNON

12:28 Now, we have web access, don't sell it. Yeah. And so, but I asked Dan and Alan, I said, please tell me that, the integration with Accumatica is going to be much better than Sage. And he said, Sage, he said we're having a really hard time building the integration to Sage.

*--- Accounting integrations ends ---*

SHANNON

12:53 He said it doesn't have everything that we needed to, sounds familiar. And he said, and they just bought corcon and he said we're now questioning whether or not we want to have that relationship at.

TANYA

13:07 Well, and also, I don't know if you, when you're a sign or if you dealt with us at all, but, you know, Sage is also gonna start charging for API calls come the end of the year.

*--- Accounting integrations ---*

TANYA

13:18 Yeah. So, I mean, we're just, you know, for us, we have an integration, it is some of these, you know, estimated annual charges are substantial and...

SHANNON

13:31 Yes.

TANYA

13:32 So, for, so I would think, if I'm somebody a Sage customer using a service product, using project management like pro core using a maybe using pay something, you know, using Salesforce, something, you know, now, I've got all this extra cost all of a sudden. It's going to show up. I mean, I don't know what? I don't know what they were thinking.

*--- Accounting integrations ends ---*

SHANNON

13:55 I mean, you know, Accumatica does have an API call limit and then you have to purchase a piece, but that limit is huge. I mean, it's pretty big. Yeah, Christina was telling me Christina, meaning our product manager of integrations at a signer, she was telling me that she's estimating the typical customer was gonna spend 3,500 to 5,000 dollars a year on our API call.

TANYA

14:28 And then we have to manage it as a partner, you know? So I don't know. We, we, we're we have a meeting later today how we're going to deal with it, you know... and Sage is making us look like the bad guy because we're you know, we're the one that's gonna have to start charging for it and passing it down to them.

SHANNON

14:47 Well, and that's what Christina said. We're basically gonna get a Bill once a quarter from Sage for the API calls for all of the customers that have our solution. And then we have to then turn around and Bill that to the client.

TANYA

15:04 Yeah... it's ridiculous.

SHANNON

15:09 I really people, I keep having people say to me. I had Taylor McDonald text me when I was interviewing with it. So, when I left, when I so sake and Shawn chatter came to me at summit and said, hey, we want to get you back in the channel. What do we have to do? I basically said you got to find me a partner that I can't outsell my punt coverage because that's what that's that was the whole reason that I left action was.

*--- Implementation and ongoing support ---*

SHANNON

15:42 Yeah, I mean, two things about four or five times I out sold, what our implementation team was capable of handling. We were getting to the point that we were telling people they were going to have to wait four to six months to start implementation. And, and the other thing was, is that Scott refused to hire a customer success team. So I was responsible for all of my renewals.

*--- Pricing ---*

TANYA

16:10 Yeah.

SHANNON

16:11 And, and I basically, for the whole year of 2021, I kept going to Scott and saying, hey, did, do you want me to sell 25 new Accumatica deals or do you want me to do 75 renewals? Because I can't do both? And he was like, I'm not double paying commission.

SHANNON

16:28 I'm not, you know, doing I'm like to come on, give me a break. Go hire a freak, an SDR or CSM for 50 grand a year and let them do renewals and let me go do what I do. And he refused. And so I said, okay, I eventually had one, one executive at action, told me that it was brought up in a meeting that I was complaining and Scott said Shannon's making too much money. He'll never leave.

TANYA

17:00 You're like, bye.

SHANNON

17:01 All right. See you.

TANYA

17:05 Well, I saw that. That was it. Bob. Is it Bob black left or, and I know Christina has been promoted and I...

SHANNON

17:11 Yeah. And of course, I got a snarky little text from Christina when she found out that I joined strategy, she's like, hey, you didn't even let me know you were looking. I'm like, nope, that's because I wouldn't work for you from the it's for.

TANYA

17:28 That's exactly. Yeah, never.

SHANNON

17:32 Work for you. If it was the last job on earth, I'll go live in a box.

TANYA

17:39 Right there with you.

SHANNON

17:40 So, so anyway, so tell me what, I know Joel. So I've talked to Joel a couple of times and I've talked to Sydney, Cindy a couple of times about, and then the other day, and then the other day, somebody told me, you know, hey, we're we are in conversations about, you know, field service applications and all this stuff. You know, what do you think of this piece? What do you think of that piece? And, you know, Glen immediately called me as well. And Glen was like, hey, I'm in conversations about this, what, you know, what are your thoughts? And I'm like man, field service, is a tough go.

SHANNON

18:31 And, the interesting thing is, you guys are more focused if I'm not mistaken. If I know, I don't know much about service trade. I don't know much about service tighten, and I don't know a lot about BuildOps either, but my understanding is that service tighten is like king of residential... like for the, you know, for the huge hvac service contractor that's got 300 trucks in Charlotte... and they're serving in almost entirely residential clients.

TANYA

19:12 Yeah. They care about like they track all the marketing stuff. They do like, the quoting on, the like, the tablets is good, better best and they've got the flat rate book that they can pick the task. And so it's they're totally residential yep.

SHANNON

19:25 And you guys probably lean more towards the commercial or is that's what I've heard?

TANYA

19:31 Yes, we're I mean, we, you know, we do have customers that have some residential, but we don't track the marketing. We don't do the good better best. We're the commercial guy that's going out there. So obviously basic dispatching, you know, all, the standard stuff, dispatching scheduling boards, great mobile app, but we really are strong with like maintenance contracts and scheduling, all of that pull-through work. So when they're out there, they can document it and it gets logged in its own little like thing called efficiency.

--- *Type of work ends* ---

TANYA

20:01 Then then they can pull it through do quoting, turn that quote into work. It's all really nice. And then we also just purchased a product called Northboundary, but you may have heard of it's. It's out of Florida. It's a small company, but they focus on estimating for mechanical contractors. So they can do like estimating maintenance agreements, but also estimating you know, large mechanical jobs too. So, so really fire and life safety is where we started. So we have a lot of it has the word fire or sprinkler in it. We're the most the best fit for them. And then mechanical is very similar to that. So anybody that does inspections is really a good fit for us.

SHANNON

20:44 Okay. And especially so one time I was talking with a guy, matter of fact, he was out of Raleigh, you probably knowing... it was a, it was a fire company that was quickly growing. They were probably 20 to 30,000,000 and, he was frustrated at Quickbooks. Yeah. But he was using service trade.

--- *Forms* ---

SHANNON

21:08 And the thing he loved about service trade was the ability to have an inspection form for the state that had to be submitted. And you guys had done something to be able to automatically submit that inspection for?

TANYA

21:24 We do a lot with forms because especially in fire and life safety, there's so many specific forms for the different jurisdictions. So we actually, we have, we can do like we can take PDFS and they can fit like create blank paperwork where they fill them out. We can do, we have our own custom form tool that they can build forms. And then we also have some other tools that they can have like sort standard forms that they just, we've already gotten. We have beyond the state of Florida or the state of blah blah blah kind of thing.

--- *Forms ends* ---

SHANNON

21:54 Yeah. So, where are you guys in this mix of Accumatica? Because obviously, I'd love to be able to work with you guys and figure it out. You know, I think my opinion, is that there is an application for Accumatica field service, but, it's very narrow.

TANYA

22:19 You...

SHANNON

22:19 Know, if you're talking about a company that manufactures their product and then goes and installs that product and then goes and services the installed product, I think it's it has a pretty good application for that.

--- *Type of work* ---

TANYA

22:34 Yeah.

SHANNON

22:35 But if you're talking about an electrical service company or a mechanical or fire, you know, all that kind of stuff. The break fix type stuff is not acumetic, a specialty at all.

TANYA

22:51 No, no. And I think the mobile app is really clunky and hard for them to use.

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

TANYA

22:56 And, you know, one of the things that I think we produce an invoice and there's a link embedded in it and that link they click on. It's, got like all the pictures, the videos, the write ups and all that stuff. So I think it's just a lot better experience which is really what we're big on is what the customer experiences.

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

TANYA

23:14 And so that's what our customers like as they're trying to get that experience out there. So, and I know you've got to go in a few minutes. So, we have a couple of, we have a, we have a couple of Accumatica customers, some one, a huge one that I sold in Texas. Who was when I sold it, the plan with the leave service trade and go all in Accumatica. And now three plus years later they, they've not even made the transition off in service trade to Accumatica. And so they've got some customers that just run it side by side, whatever reason.

--- *Accounting* ---

TANYA

23:44 Maybe they're using import scenarios and bringing stuff been. But we have a customer we sold in Oklahoma that's been on Accumatica. They have the service module and they are just miserable. So they bought service trade and they were gonna just kinda run service trade here and do imports.

--- *Accounting ends* ---

TANYA

23:59 But then they decided they just didn't want to do that. So we just, I've got a consultant at partner that's writing integration. He's already gotten started of, you know, bringing data over. And so really the concept, is like abandoning all service at Accumatica. And so then sort of a shift that service trade here. I'll show you my screen real quick. I've got my little scope and I together. So this is sort of the preliminary. So some of this is based on their need. So we would, you know, we were, we're removing the service module. So customers in service trade or customers in Accumatica, you know, location.

--- *Invoicing* ---

TANYA

24:41 So that that's sort of maps out nicely that, you know, acumatica has locations, service trade can build an invoice and a lot of customers like building the invoice in service trade because the way it goes out and then it would just come over as an accounting transaction. We also can do purchasing an inventory, which makes it really seamless between in the service module like over not in service trade, I should say.

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

TANYA

25:05 So then we would pass over, you know, the vendor. Then we can set up a project. We do that with intact. And I think it helps some people to have like that double check that they can, that would be optional if somebody wants to replicate every service trade work order as a project and acumatica and then bills would come over because you would enter your ap in the service trade and then inventory would just flow through is journal entry. So you can see the movement.

--- Accounting ---

SHANNON

25:37 Okay.

TANYA

25:39 So that's kinda that's really, this is what we're doing for this customer. You know, it's our phase one and then phase two would be like, how do we want to update and delete invoices? And then this particular customer is fine with just importing time for payroll since it's a weekly event, but that could be also something that we could automate as well.

--- Accounting integrations ---

SHANNON

25:57 Yeah, yeah, yeah.

TANYA

26:00 So, what do you think of that?

SHANNON

26:03 I mean, I think.

SHANNON

26:10 I think it's interesting. I think that... you know, I'm just thinking back to our Sage timberline days of basically, the service application in timberline was a, it was a third party product that connected back to Sage and the inventories weren't connected and all that kind of stuff.

--- Type of work ---

SHANNON

26:36 So basically at this point... for a company that only does service, that makes it really easy because then Accumatica really is just the GL accounting solution... for the companies that do 50. You know, if I'm talking about 100,000,000 dollar company and 50 percent of their work is service and 50 percent of their work is Construction and they need full inventory on the Construction side.

--- Parts management (inventory) ---



SHANNON

27:14 You know, that's the part where I get a little squiggly. I don't think it's out of the question. But then I think we're kind of looking at the similar situation that we used to deal with timberline of having here, I'm all my Construction inventory over here and I'm doing all my service inventory over.

--- Accounting ---

TANYA

27:34 And we have another workflow that we had put together for actually for a Sage say no September line, I can't say not say timberline or that we, in stage we were creating, they were actually using poib, and so we would, as they create a po, we would write back, that we would, the cost would come over to service trade.

--- Accounting ends ---

TANYA

27:57 So, you know, the guy that I've I'm working with to do this integration is phenomenal. He is like so easy going like whatever. So, I think, if, you know, because that is the case, I mean you've either got the all in service contractor or you've got this like company that does both their huge Construction and then they have a service division and they, you know, either, they perceive that they have one inventory, you know, and really maybe the inventories really offer service and like seven things a month go to the Construction division.

--- Parts management (inventory) ---

TANYA

28:30 But nonetheless, they want that all in one. So I think that there is a way that, you know, this is based on you're doing your inventory out of our system and you're approaching our system, but I think that there could be a case that we have a version of that he may be, he probably be open to of saying that Accumatica is the source of purchase orders and inventory and stuff moves over to service trade. And just as, you know, it just updates service trade with costs and things like that.

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

SHANNON

29:00 Yeah. Well, it's interesting. I'd love for us to spend some more time together.

TANYA

29:05 Yeah, yeah.

SHANNON

29:06 And obviously, if I run into anything that I'm like, you know, we just can't do this. I'll reach out and call you and say, hey, what do you wanna look at this? You know, and...

TANYA

29:20 Because I mean, now that we've got somebody, I think we are really open to maybe, you know, having a couple that because, you know, everybody who I talked to that's really given to go with a vacumonica service is just miserable. And I know Bob said at a Gordon, they turned down leads, they get a lead from a Monica that's got service, they say, no.

SHANNON

29:41 Yeah.

TANYA

29:43 Yeah.

SHANNON

29:43 Yep. For sure for sure. Well, hey, thanks for connecting up with me and.

TANYA

29:50 Yeah. Where are you? Where are you located again now?

SHANNON

29:53 I'm in Holden beach. So I'm literally 20 minutes from your parents. They're in a.

TANYA

29:59 Yeah, yeah. I was trying to remember where you were, so.

SHANNON

30:04 If you come down and see mom and dad, call me up, let's me cape for seafood or something right there in Leland and just have a lunch or something.

TANYA

30:11 Yeah, that sounds good. I'll have to, I'll definitely do that now that they're back up here. So. Well, cool.

--- Dispatch ---

TANYA

30:16 Yeah, I'd love to talk more when we get some time and, but glad introduce you to it and I can run you through more details of service trade too, so you can just see it sounds like you know, a little bit more, all right?

SHANNON

30:25 Thank you.

TANYA

30:26 Have a great weekend, Shannon. See.

--- *Dispatch ends* ---

SHANNON

30:27 You girl. Take care bye.

*The End*