



# **Ledgerwood Associates Hawaii, Inc. & ServiceTrade | Meeting**

Dan Waggoner with Ledgerwood Associates Hawaii, Inc.  
Recorded on 9/7/22 via Zoom, 47 min.

## **Participants**

### **SERVICE TRADE**

Dan Waggoner  
*Territory Manager*

Tanya Eney  
*Partner Manager*

### **LEDGERWOOD ASSOCIATES HAWAII, INC.**

Patrick Ledgerwood

# Topics

<i>Accounting integrations</i> .....	2:22
<i>Pricing</i> .....	3:50
<i>Access to information</i> .....	8:05
<i>Tech On-site</i> .....	8:43
<i>Customer engagement</i> .....	8:59
<i>Tech On-site</i> .....	9:40
<i>Deficiencies</i> .....	10:02
<i>Customer engagement (quoting and invoicing)</i> .....	10:26
<i>Customer engagement</i> .....	10:42
<i>Customer engagement (quoting and invoicing)</i> .....	11:48
<i>Invoicing</i> .....	12:09
<i>Customer engagement</i> .....	12:55
<i>Accounting integrations</i> .....	13:13
<i>Accounting</i> .....	13:38
<i>Parts management (inventory)</i> .....	14:24
<i>Invoicing</i> .....	14:54
<i>Recurring maintenance</i> .....	15:18
<i>Accounting integrations</i> .....	15:44
<i>Accounting</i> .....	16:02
<i>Parts management (inventory)</i> .....	17:07
<i>Parts management (inventory)</i> .....	18:17
<i>ST app contracts and pricing</i> .....	19:18
<i>Type of work</i> .....	19:51
<i>ST app contracts and pricing</i> .....	20:10
<i>Type of work</i> .....	20:36
<i>Accounting integrations</i> .....	23:08
<i>Accounting integrations</i> .....	24:57
<i>Purchase decision</i> .....	25:27
<i>Accounting integrations</i> .....	25:45
<i>Accounting integrations</i> .....	28:00
<i>Pricing</i> .....	28:46
<i>Accounting integrations</i> .....	29:05
<i>Accounting integrations</i> .....	30:54
<i>Type of work</i> .....	31:50
<i>Pricing</i> .....	32:46
<i>ST app contracts and pricing</i> .....	33:40
<i>Parts management (inventory)</i> .....	34:03
<i>Purchase decision</i> .....	34:34
<i>Invoicing</i> .....	35:54

<i>Access to information</i> .....	36:14
<i>Parts management (inventory)</i> .....	36:34
<i>Parts management (purchase orders)</i> .....	36:54
<i>Accounting integrations</i> .....	37:27
<i>Tech time tracking</i> .....	38:14
<i>Accounting integrations</i> .....	39:00
<i>Accounting integrations</i> .....	39:47
<i>Accounting</i> .....	40:05
<i>Pricing</i> .....	40:43
<i>Accounting integrations</i> .....	41:06
<i>Access to information</i> .....	42:26
<i>Accounting integrations</i> .....	43:03
<i>Dispatch</i> .....	44:31
<i>Customer engagement (quoting and invoicing)</i> .....	44:47
<i>Customer engagement</i> .....	45:24
<i>Quote templates</i> .....	45:39
<i>Purchase decision</i> .....	45:59

# Transcript

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

DAN

0:00 Hi there, Pat.

TANYA

0:00 How are you doing?

DAN

0:01 I'm doing pretty well, doing pretty well, right? Should have Tanya here joining us in just a moment. Okay, cool. So you'd be flexible with everything and getting this to be able to fit at the end today. Yeah.

TANYA

0:18 Do you find any other client?

PATRICK

0:20 And the...

DAN

0:20 Y... see clients in Hawaii? I know we've got about a handful. Yeah, cool. Here. No, recently, I had brought on Hawaii TV partners. I don't know if you've heard of them. Yeah. Yep. Jeff, I'm Jeff worked with them as their Sage consultant representative, if you will that we were in conversation quite a bit about an integration for them and they ended up going without it to get started... but that's not off the top of my head.

PATRICK

1:02 That's an interesting conversation when Jeff works with you because it's my territory and my client and Jeff works with you have white baby partners and American piping boiler, which is what the licenses under for the software and then my client for about 30 years.

DAN

1:19 Interesting.

PATRICK

1:20 Yeah... it's not that cool.

DAN

1:29 Well, there will be someone I guess that you're familiar with them or lean over there.

PATRICK

1:34 I've worked with early for, among the three different clients for different clients for years.

DAN

1:40 Wow. Okay. And Tanya met earlier as well. Yeah.

TANYA

1:44 Hello. Sorry about that. I was transitioning from the office to home and I guess my air pods through my earphones, we're not anyway, hello.

DAN

1:54 No, not at all. Well. I've got Pat with us here today. He is like I mentioned to you yesterday, looking into software for elite mechanical is out in a, why he's been their stage consultant for 30 plus years, I believe. Is that right?

TANYA

2:10 Wow.

PATRICK

2:12 Well, probably, I don't know what day it was finally 25.

--- *Accounting integrations* ---

PATRICK

2:22 And I understand you work with early in a little bit.

TANYA

2:26 So... I work with Tony and who I don't make trade shows with primarily. And then I used to. So I was a long time Sage reselling myself. I work for alliance. I mostly so stage 100 or master builder, but then picked up timberline along the way with everybody merged together.

--- *Accounting integrations ends* ---

TANYA

2:49 And so I've been selling 300 that I sold Intacct and acrobatic with alliance, but then moved over to service trade about a year and a half ago.

PATRICK

2:58 Cool. Alright. Yeah. I've been around doing this since 1985. I came to Hawaii and 88. Okay. Client clients like early monthly, young partners?

TANYA

3:10 Yes.

PATRICK

3:11 I've worked yesterday or when she was at a wild limited and sheet metal when she was over at another company info with their own, our another company and then another company. So, I know a long time.

TANYA

3:23 Good, good.

PATRICK

3:24 Yeah. So.

DAN

3:28 I'm sorry, go ahead, Tanya. No, I'm...

TANYA

3:30 Do you sell mostly through... legit, what are now ethos or to use? Where do you sell through?

PATRICK

3:37 So to give you the one minute spiel, when I came to the Y and 88, we Ledgerwood was a business partner, okay? And we continue to be a business partner.

--- Pricing ---

PATRICK

3:50 I broke off my brother and probably 99 to he was in Australia, and then we were still a business partner in why until like 2007 with how you already have is on the wall up your Sage bought it. They were gonna kill us all with 20 percent whatever.

--- Pricing ends ---

PATRICK

4:07 There was no money in it. So we joined up with skyline business systems at that point in time. Okay? Kind of a natural alliance with the northwest. I knew and John for a long time. Those guys, and then recently, sock, I bought skyline. So in the transition from skyline, the sock guy, worse, you know, I don't have any formal agreement. Was that guy? You know, it's supposed to be the guy on the ground. I'm still servicing clients. We still sell some software, but obviously in the transition to all

of these third party products and we managing subscriptions and it's and trying to get people to buy Sage intact. Berg.

TANYA

4:50 Let's...

PATRICK

4:50 Say three, maybe it is a nightmare to try to make a living as a salesperson.

TANYA

4:57 No, it really is change things a lot. I mean, with the way that they're selling it absolutely. So, okay. Yeah, I know I have no Jeff and John for a long time as well. And they actually saw Jeff out at the HR show in February. And so, anyway, well, good. Yes, for the one, the history?

PATRICK

5:20 Yeah, yeah.

TANYA

5:21 I never go to the admin to Australia and worked with timberline and Australia until just a couple of years ago.

PATRICK

5:26 Yeah, that's how I got to have. Why when I was a, I think it was 23 years old. He called me up and said you want to come out and run the Hawaii office and I want to move to Australia, getting the hawaiian 23 for week and a half with him. And then he went to Australia. I've been in July.

TANYA

5:46 That's awesome.

PATRICK

5:47 Yeah, four years ago.

TANYA

5:52 Nice.

PATRICK

5:53 Yeah.

TANYA

5:54 So I was telling me that you are, you guys are you got somebody who's on Sage but is interested in service and so wanted to learn a little bit more about service

trade. And I've got a powerpoint that I've watched several business partners through just to kind of and then we can definitely get into the software to. But I think that's kinda sorta just explains a little bit more about who service trade is mean we definitely have a niche that we service that we do really well. So I think the, I don't know too much background dance given you but, you know, just a little bit more background we started and fire life safety and we've we know grown into mechanical. We've always been a SaaS based. We were started in 2012 and we're actually closer down to 200 employees and probably closer now to a 1,000 customers. So we've grown quite a bit. We've gotten too big rounds of funding. And so we are just a lot more growth to be had out of us. Yeah, mission statement is really to help the service contractor become more valuable to their customer and grow their business. You know, for me having so Sage for many years, you know, my always, my emphasis has been like back office efficiency and making the back office more efficient, which we do help with. But this is, you know, service trades, real value is helping their customers grow their business, which isn't always what accounting software. And all at once, do you know where we do a really good job of helping them grow their business. And in fact, we just finished doing some searches survey of our customers space. And, you know, we have helped on average grow our customers by 20 per four percent year over year. And, you know, how do we do that? How do we help them grow? Well, it's not there's. Not one, you know, magic bullet as a couple of different things. I mean, some of these things that, you know, any traditional software companies gonna do give them more organization of helping them schedule work, quarters and dispatch missions. I think one thing we do really well. And that's why we target the fire and life safety and mechanical space is because we do a really good job of helping schedule and manage that plan maintenance work. So this is the screen you're looking at here is where they can see the upcoming plan maintenance.

--- Access to information ---

TANYA

8:05 They can narrow this window down by what's coming up for the week the next day and then they can plan out where they're going to do that work so they can group it together to best maximize technicians time. We also have a really nice mobile app, you know, with these guys in the field making it very easy for them to use to input information to find information service trade does a really good job of that of letting the tech, you know, easily click that they're on site, add paperwork, attach pictures, videos all within the app.

--- Tech On-site ---

TANYA

8:43 And then for the back office we'd do, you know, give them a nice view of what's going on. They can easily see the flow of jobs that have recently been finished, clock events, things like that to be able to schedule the next job. So a lot of these things I think are similar to other products.

--- Customer engagement ---

TANYA

8:59 I think our app is really easy to use. We get a lot of good feedback from the field techs really like it. No, we're I think we started to be different is, you know how much



we focus on helping now, our cause our customers, the service contractors, their customers are expecting that Amazon like experience that we all, you know, I think for a long time, I used to be like well that's just for residential folks. But now commercial want that same no charge hands off experience. I'm booking work and finding out information. And I think we do a really good job of helping with the experience by, you know, starting off by notifying the check, notifying the customer, the checks on the way, we have a partnership with a zoo guy which is a fleet management.

--- Tech On-site ---

TANYA

9:40 So that will like look, you know, using GPS and he will auto clock them in when they come into the area for their customer. We also do an excellent job of sharing the information that our tech us collected. What this is showing on my screen is what we call our service link.

--- Deficiencies ---

TANYA

10:02 And so it's a combination of the notes. The check is written up all the attachments, but also something that is what helps propelled our growth is the alerts are we call them deficiencies. So when are your tax out there? Or text out there doing their maintenance? And they come across something, they can note it as a deficiency or an alert and then they can turn this paperwork into their customers getting this.

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

TANYA

10:26 They can even get this upfront. So the check that arrives send the service link. And then as the check is adding information, the user can see the information being added real time. So instead of having to send a bunch of attachments all bundled up at a link that they can click on and view all the detailed information.

--- Customer engagement ---

TANYA

10:42 And the alerts are really what's key where we call our deficiency Lou of the tech reporting something they discovery on the job that will maybe make equipment go down in the future, bring it to the customer's attention to touch customer saying yes, please quote that for me, us quoting that work, starting that, the customer signing that quote, approving it and then turning that into more work. And so we do a really good job with that because of the way that we can, you know, we make it easy for the text to capture that information, store it and then turn into quotes. And then we also have a really nice portal because back to the Amazon thing, people don't wanna have to always call up and ask if they want to self serve. And our portal let's them request work view, you know, account information, view, quotes, view invoices, all those details from our service for.

PATRICK

11:35 And pay as well.

TANYA

11:37 They campaign that's and that's the next piece of this is that, you know, we also help them increase their revenue one by turning more those repair opportunities or deficiencies we're just talking about into quote.

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

TANYA

11:48 So this screen you're looking at here is a sample of a quote. So it's got pictures. It's got, you know, terms and conditions that can be customized, their logo. And then up here is approve or request changes. And what's cool too is that when we send this out, it tracks the history that it was set to Pat, opened it up this date and time, you know.

*--- Invoicing ---*

TANYA

12:09 And so we know what's going on with it. It's not just this black hole. And then to your point, yes, we can't pay invoices online. So this is a invoice snippet. That one, when they get this, there is that service details like that they can click on that will take them back to all those pictures and videos and all that good stuff. And then the pay now button, let's then pay it.

PATRICK

12:33 All all kinds of payments obviously.

TANYA

12:36 Yeah, AC, H and credit card... and then lastly, you know, helping them gain more customers is once the work has finished, we can send out a review request and if they review it, you know, four or five stars and they can push it over and publish it on Google.

*--- Customer engagement ---*

TANYA

12:55 So that's a partner that we work with that will do that service for them, letting them publish positive reviews on Google and help them increase their, you know, that where they land on the Google page when somebody searches for, you know, service contractor and I want to business.

*--- Accounting integrations ---*

TANYA

13:13 So those are the, that's kind of like my firm overview. I like to show, you know, then it's for you guys accounting people. It's how does it connect to my accounting software? And we connect in a variety of ways. One, we have what we call our service trade accounting connector, which is really a tool we built that writes a script that exports information and puts it in a format that can be imported.

--- Accounting ---

TANYA

13:38 So we have some Sage customers that just use sages, you know, native import tools. We create an export. They pick up, they, you know, maybe export everything once a day, once a week, and then they turn around to import it in. We also, I know you almost. So, so yeah, dynamics, do you know Robert Burger and the dynamics?

PATRICK

14:00 Nope.

TANYA

14:01 Okay. Robertson, longtime timberline Sage consultant. He wrote an integration to stage 100, but he's also now written and integration to stage 300. We have another partner that right one as well. But we have Robert is written this new integration for us that will let us say companies to customers and Sage, we can sync over locations to jobs.

--- Parts management (inventory) ---

TANYA

14:24 But typically most people don't then invoices come over as our invoices. And then if you're doing are we have a purchasing an inventory module and if you're using purchasing inventory, we can sync that over. We also can sync over labor to as a payroll country, our payroll import. Excuse me. So this is something that's automated and then obviously has to be configured.

--- Invoicing ---

PATRICK

14:54 So I don't see payment from him.

TANYA

14:57 Payments will come back. This needs to be updated. That with this has got my old graph or charge. But I can send you over the refresh model that we do payments. So as you do payments and stage. So you apply the payments and Sage, we can sync those back over and update status is in service trade.

--- Recurring maintenance ---

PATRICK

15:18 So locations... your location obviously as a site or a pizza hut or whatever. And then why are you saying that locations can update job? Some jobs gonna be.

TANYA

15:34 So, you know, we, I think that this is one of several variations of the integration because customers all have different needs.

*--- Accounting integrations ---*

TANYA

15:44 And as you know, when you've been on Sage for a long time, sometimes it's hard to completely change everything with Sage. And so most of our customers don't want to the locations that they sorta treat. Service trade becomes their service management module in essence and at like SS.

*--- Accounting ---*

TANYA

16:02 So all in one. And so they don't they look to see all the detail and service trade and all that's gonna flow back and forth is on this the company or the customer level?

PATRICK

16:15 Because right now the client has a job for every service work quarter and you could sync it back and forth to the actual job that is a work order.

TANYA

16:24 Okay.

PATRICK

16:25 Yeah. So I get what you're saying there, but yeah. So jobs is the actual work order and service trade and only an S, C is what is the fee?

TANYA

16:37 Would be lucky. So in the hierarchy like service trade has similar to service management, has companies locations or sites and then work quarters or jobs is sort of our tiered structure.

PATRICK

16:48 Hi, Nancy means there is no integration. If we do the work orders that just stays in service trade.

TANYA

16:53 Right, right. And some people yeah create and they want to, maybe you want to get a little bit of breakdown of site costing. So some customers have chosen to create

each site or location as a job.

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

TANYA

17:07 We don't really recommend it. I mean, I think once they really buying into service trade, they can see all that detail in service trade, similar. They could see it on SM.

PATRICK

17:16 Right. Got it. So labor costs will flow into payroll time.

TANYA

17:22 Yeah.

PATRICK

17:23 Material costs will go in to GL, got it.

TANYA

17:28 Yeah. Or if you're using our partsledger purchasing inventory module, then that will flow over as either journal entries. So for the inventory changes, it will flow over as a journal entry or it will come at any purchase orders that are good, receive, we'll come over as accounts payable invoices. So trying to eliminate the need for service manager.

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

PATRICK

17:53 Yeah. So one thing I'll kinda blow up your presentation a little bit here. I'm okay with. I don't want you to necessarily show me like on the end user customer, I want to add, ask very pointed questions. I'm going to, I'm going to assume for the most part that obviously we do quotes obviously we can do work orders, mobile ability.

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

PATRICK

18:17 Obviously, we can do scheduling. There's a lot of obvious things that SSO and trade service and BuildOps and a lot of other products to do. So integration is one of the things that cheerleader will differentiate. But another one that can is they, hey, one other trigger points is one material management, everything from us of middle into a purchase order into receiving of the item either into inventory or to a work order or job.

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

PATRICK

18:52 And then another one would be how much, you know, because all your clients probably have a Construction side as well. So is there any thing and service tray for them to handle other project management or are they going to be for us to go out to autodesk builder, pro, core rebuild or something like that? What do you, what are your thoughts on that? So?

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

TANYA

19:18 Construction, are we talking like the 1,000,000 dollar project? Are we talking like the 100,000 dollar project?

PATRICK

19:27 I don't really know what the differences because 100 or they're good... 1,000 dollar projects. They're gonna have 100,000 projects. They're gonna have, they're gonna have projects that they do that they might even do is acting as a little bit of a DC one or two subs, you know, that they're not going through a general on, you know what I mean?

--- *Type of work* ---

TANYA

19:51 Yes. So I mean for us, we can handle, we're not like full blown pro core even say just project management. We don't do submittals, trust metals we offer to our F eyes. Now, we can do purchase orders is to be even some labor type purchase orders, likes of contracts.

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

TANYA

20:10 We do have some project management, more project management functionality coming out like we can't do budgeting but will soon be rolling out managing changes, managing progresses bills, not full blown AI billing, but some Progress type billing, but that's not here right this minute, but that is where we're going with some more project management functions not to the level of like a pro for or even like an easy sell.

--- *Type of work* ---

TANYA

20:36 But, you know, that's handling those smaller projects that maybe you're you are acting as the GC. So you don't need, you know, some of the depth of product project documents that she would if you were calling to Hec?

DAN

20:57 Yeah, that's let's say that, you know, we're rolling out the more things to support project management. But obviously we work where we really thrive and excel is in

the, you know, maintenance and service side of your business. That being said, I think I mentioned that, you know, on the, on our first call as well that, you know, our customers, a lot of them do like you said, how to have a Construction side of their business. And most of them if not all are doing some sort of, you know, install and job that take several weeks, you know, at least right at a minimum, so service trade absolutely can handle, you know, shorter project three two, six months that's something that our customers have been doing per year, you know, before we even really started focusing on any sort of project management development. So I think that, you know, will be offering up that side of the platform. But yeah, that, that's a little bit more insight into it if it would be, I guess the important to kind of gauge where your project fall in that category, whether it's you know, you've got tons of projects that are less than six month, less than three months and that's 90 percent of your work overall.

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

DAN

22:07 And there's just a couple of projects yearly that are, you know, going outside of what you might be able to handle in service trade. And that would be probably important to know as you're determining your decision.

PATRICK

22:19 Yeah. I mean, obviously I'm Dan, what I've told you before is I'm kind of in a weird spot here because I've always so Sage and always been a consultant and that's a weird spot in and of itself because, you know, when I'm in, they're selling something and promising something. Then I have to go back and make sure it's it is what it is. And I is a very small people talk, you know, so you do a good job or, you know, last... now obviously, with things changing, it's hard, you know, I'm like trying to help my clients that are on these old legacy products like you can appreciate Tanya and this particular client that work with for so long that they're basically saying, hey, we're we want to get into that we want to service product.

*--- Accounting integrations ---*

PATRICK

23:08 Should we just buy the service management and get SSO? And I'm like, well we can, it'll probably work, but there are other options out there and even the option to go into Sage intacct. So.

TANYA

23:22 Yeah.

PATRICK

23:22 And we're not gonna handle the project management side and SSO. So if you want to do that, we're going to have to go back outside.

*--- Accounting integrations ends ---*

PATRICK

23:29 You probably don't want our old legacy project management module. So you're probably gonna have to go outside. That means integrations and get an HH to involve. And if you go with pro for all of the Bill, red team or it gets confusing. So client and I said, well, you know, they're having trouble reviewing it, they've got a project side and a service side. And I just said, well, if you want, I can help you basically evaluate different products and give you my best recommendation from what I know of your company and what I know of what's coming in with the integration is. So I'm trying to help them decide whether they just bite the bullet and go with SSO. If they look to the feature, go with something like service trade. It's maybe a little more robust, a little more like to say client forward but doesn't have the project management side and deal with that elsewhere, go with build off, which doesn't have an interface with same theory at all. And probably never, well, I don't know why you would build one if you haven't built one already or do we bite the bullet and try to go to Sage intacct and its entirety, which is a bigger pill to swallow and integrate a piece of software. I understand you interface with impact as well.

--- Accounting integrations ---

PATRICK

24:57 And you're in fintech is probably better than the one with seo really because it's easier to do. Same guys. Did the same guy do the Sage intacct?

TANYA

25:06 No, we go to Sage intacct native in house?

PATRICK

25:10 Okay. So, you know, I am just trying to help the client make the best decision with the best information and I don't know that any of us here couldn't tell him right now.

--- Purchase decision ---

PATRICK

25:27 The best decision is service trade for you guys, the best decision as to go to impact and get SSO, the best decision as to do. We don't know, we don't know what tomorrow roles. So that's kind of where I mean, in a perfect world, we would have something that did everything in a perfect world.

--- Accounting integrations ---

PATRICK

25:45 I would have a product either with CRV or whatever, but it's gotta integrate because that's really what we want. We don't want to do double entry. Alright? In a perfect world, we'd only pay for one subscription product where everybody can go in and access it whether you work Construction side or the service side, and the service guys work on Construction projects and vice versa.

--- Accounting integrations ends ---



PATRICK

26:09 And it would come out with a time sheet that would flow into payroll. In a perfect world that's what would happen in a perfect world, they would have a material management piece where submittals, quick turnaround, just purchase orders could turn into tracking and then into issuing out to the job. And that perfect world apparently doesn't exist, right? It doesn't so, what are the, what are the 10 or 15 or 20 percent... that we want to hope for the future on or just deal with manually or deal with a second or, and, or third prop you ever heard of code? Yeah.

TANYA

26:54 That's just a service product or?

PATRICK

26:57 Daniel?

DAN

26:59 Joe, you said, I don't think.

PATRICK

27:00 So, yeah. So I'm working with the autodesk build the other day and they brought up code. You apparently code, you always have material management program. Yeah. Okay. Manages all that, you know, what kind of when you talk about it, it's kinda like we don't have this already and one of our... you know, that's consultants done it for all these years, you kind of thing, Jesus christ. Can we just have one product that can, do... you do this office connector to do financial statements... right?

TANYA

27:35 Some...

PATRICK

27:36 Other third party dashboard programmed to throw it up on the dashboard. Then we gotta do first the reports and it's like my God... that were a client just throw up their hands as, you know, what? I'm gonna stay with what I got, you know, because I've had clients move to another move to Viewpoint and never get it up and running, move to other products and never get it up and running, you know?

--- Accounting integrations ---

PATRICK

28:00 And I'm curious clients I've got saved me what has brought Sage see already to this point in their market where people can't stop saying the word timberline and... to say Sage is demise, they have never modified the install. So it's still goes to a timberline folder. So, how the hell do you want us to stop saying timberline? Yeah?

--- Accounting integrations ends ---

TANYA

28:25 Yes, the bottom, right?

PATRICK

28:28 Years ago, and you can't get out of that. What does that speak to? I think it speaks to the fact that with a hell of a product that the time people use, it does what it needs to do.

TANYA

28:39 Hey, John. It's...

PATRICK

28:40 If it's working for 90 or 90 percent of what we integrate something else into it, then there we are.

--- Pricing ---

PATRICK

28:46 So that's the problem with also getting people to move over to Sage, intact, it's like, well, why am I moving over to? These guys? Are paying about 5,000 or 6,000 dollars.

TANYA

28:56 That's the other problem. Yup.

PATRICK

28:58 That they have five or 6,000 dollars a year for maintenance and they go to impact, they're going to be banned like 80,000 dollars a year.

--- Accounting integrations ---

TANYA

29:05 Yeah.

PATRICK

29:06 And in fact, and it's still gonna have to buy a product like a service trade or, you know... something. Yeah.

TANYA

29:14 Exactly. Well, nobody leaves Sage because it's not doing job costing well. They leave Sage because I need better project management very different. They don't like the service module. It's the operational side that drives them away. And, you know, that's why we have an integration is because there are a lot of folks that their accountants wanna stay put. What they got, it works, it produces the financials the

way they want it, you know, the job costing the way they want it, but they need something better for the field.

*--- Accounting integrations ends ---*

TANYA

29:41 And so, I think it could be a good first step to transitioning to a new technology service trade. Let's make, stay on my Sage. And then when I'm ready to make the next step to Intacct. Now, I can, you know, air quotes, unhook it from 300 and plug it in over here with Intacct and kinda, and not have lost any of all that service history in the meantime.

PATRICK

30:07 Yeah, I agree. What you're saying and I'm absolutely not in love with SSO.

TANYA

30:15 Yeah.

PATRICK

30:15 We struggle with getting people trained on it, you know, because they don't know whether they want train the rack or train through Sage or paying through a business partner and the consult on the product or 65 years old now.

TANYA

30:29 It's true.

PATRICK

30:34 Hi, is this cracks? You know?

TANYA

30:38 Well, nobody young wants to learn it. I mean, you know, they want to go, yeah, yeah.

PATRICK

30:45 I agree. Why would, you know? So then it's like, okay, well, you look at something like service? Great? I mean, BuildOps is we'll look at product and an...

*--- Accounting integrations ---*

TANYA

30:54 Yeah.

PATRICK

30:54 A lot of those things, but there's no integration with say... you know, and they're still building it out. Things are changing there's holes in it. So, do I get that you want to find the client? If I'm sitting in the clients see right in the check USA, you know, this makes sense to go to Sage intacct, so I can integrate with build up because they're promising future and what I wanna do... or, you know, so we go. Okay. Well... service trade looks super good for handling all of our service stuff and really cool. But there's some holes there. You know, we're never going to be able to integrate the Construction in one time sheet entry package, right?

TANYA

31:44 Hello, Construction service. Do they cross over or do they, are they okay?

--- *Type of work* ---

PATRICK

31:50 Yeah, it's a small company with about 12 tax go into maybe 2020 plus text shortly.

TANYA

31:56 Gotcha. Gotcha.

PATRICK

31:57 About 35 guys in the field, you know, Construction union guys. So I don't you know, now, I don't really know. I have a great solution with them. I am going to have to present them with the options and then help them make a recommendation.

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

PATRICK

32:16 I can schedule. I think you guys have are definitely a player. It's not up to me to decide... I can schedule a presentation with their service guys. I mean, I have a time slot open with the client at eight a. M, right? Good morning. If you guys want that slot, I can, I, I've seen enough of your product where I feel like it's something they should look at.

--- *Pricing* ---

PATRICK

32:46 And if we look at your product, then we will have looked at... we will have looked at three different options, BuildOps, service, trade and SSO. Okay?

PATRICK

33:04 You know, these days, as the guy that used to make five or six or eight or 10 grand a pop on a sale, I don't think I'd get any money off any of these things.

--- *Pricing ends* ---

TANYA

33:14 Well, we do have a referral fee, so we, you know, definitely, you know, pay referral.

PATRICK

33:18 See if we could go to sock guy and I'll never see it.

TANYA

33:22 Okay.

PATRICK

33:24 Obviously. So that's part of the problem there's not a lot of, yeah. So anyway, I don't know if you want that, I can coordinate with them if you want that eight AM slot, right?

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

PATRICK

33:40 That's eight AM Hawaii time you want. Again? What are the client spend like an hour and a half to show him what got? We're not going to be able to show them anything material management. We're not going to be able to show them... anything with RF eyes or budgets or anything like that. It would strictly be service.

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

TANYA

34:03 So on the service side, we can do much. I mean, I know are on the service side or are they needing to do purchase orders and inventory management?

PATRICK

34:12 They would on the service side as well. Okay. Yeah. Okay. But obviously, then it comes to the issue with, I have an inventory that's related to service, and then inventory with Construction, didn't charge out the jobs and all of those things are going to be, I mean, those are the things that happened, right?

*--- Purchase decision ---*

TANYA

34:34 Sure. Sure.

PATRICK

34:37 What do you think, Dan?

DAN

34:39 Yeah. I mean, I think it would definitely be valuable as far as I'm understanding, you know, which direction you want to pursue more to go ahead and walkthrough the product with the folks that are on the operations team over there. And, you know, when you mentioned that on Tuesday, I blocked off that time, I'm actually already had a meeting that runs until eight, about 15.

--- Purchase decision ends ---

DAN

35:01 So I could started at eight 30 and I would have 60 minutes from eight 30 to nine 30 Hawaii time. If that would work for you. Would that be an okay?

PATRICK

35:13 Yeah, it's done in that slot. Okay?

TANYA

35:17 I can, maybe what time is that Eastern Time June?

DAN

35:21 Yeah, that's going to be two 30 Eastern Time and I was guessing and the correct me if I'm wrong, Pat and Tanya, obviously, you're welcome to join, but I was guessing we'd probably be focusing more on the service trade side of things rather than many of the integration questions. Would you say that would be correct? Or would you rather, you know, play it safe and have Tanya here to address some of those integration questions as well?

PATRICK

35:45 I don't think the client will have the integration questions only I would ask those and I typically would have let the vendor do the demo.

--- Invoicing ---

PATRICK

35:54 I don't wanna I'm not, I've got to bring up those that, that's why I wanted to meet you beforehand and say, you know, does it integrate? You know... you're saying that cash receipts do come over, invoices, come over. Does, can you charge a work order to an existing job?

--- Access to information ---

PATRICK

36:14 Obviously, you do have sinks there. So those possible work order can go over whether you set up every work order as a job or whether you just have service guys that are doing maintenance worker, warranty work on a job. You know, if a Construction guy works on a service job, well, he's gonna log in as a tech and he's going to be a normal tech.

--- Parts management (inventory) ---

PATRICK

36:34 So that's fine. The material management. You know, we'll be able to charge inventory out to a job probably only via a work order. I'm guessing you would, that would work order on a job instead of a direct inventory issue to a job. Is that a true statement?

TANYA

36:54 Yeah.

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

TANYA

36:54 So for, if you've got somebody doing work on a job, my issue materials that we would kind of go through a war quarter back to the jobs. We would tie it to a job so that it could be hit the job costs side of the material costs.

PATRICK

37:08 Right, right. So then you have purchase orders, don't go over. They wouldn't show up as commitments purchase orders would only be for the work orders in service trade. So you might at two PM system if you were doing so on the Construction side, which that seems to be just the nature of the beast.

--- Accounting integrations ---

PATRICK

37:27 Obviously not a perfect world that's kind of what BuildOps is trying to do integrate the two of them. But they're not quite fully there yet, you know, with that and they don't interface with CRM. So that means, yeah, we can do it. But you guys with your whole Bergen accounting system over to impact for another eight grand a year like we'll find the owner at elite mechanical. I'm probably saying I don't know if I'm ready for step. Yeah, I'd rather just get the service side up and running as that Tanya first step into a client facing integration type piece and the whole that maybe as we grow with service trade. And if we move over to Sage intacct, then we have a solution that can do that.

--- Tech time tracking ---

PATRICK

38:14 They're going to be other holes to fill, which would be the material management, purchase orders are applied submittals for the Construction side as well as time entry, you know? So your time entry, when you do time entry, it sends the time, the labor hours over to payroll.

TANYA

38:36 It does it will.

PATRICK

38:38 Okay. So then we would have to just have the additional labor hours for Construction guys coming from a different solution... which would be... hey RP, payroll document management. I mean, you have all of you have a file folders and you can upload as many attachments and pictures as you want.

--- Accounting integrations ---

PATRICK

39:00 So that's not, I mean, I'm sure. All that's there. I love the notifications and the alerts. I think that's cool, critical. You know, we don't SSO span of a older product there. SSO said they're gonna come out with a full cloud based product two years ago and they wouldn't have to have a service management module if that happened yet.

--- Accounting integrations ends ---

PATRICK

39:21 We can't do an invoice in the cloud yet. So that's kind of a down side. I don't know price wise whether you're in the same ballpark as SSL?

TANYA

39:34 We're going to be more Vanessa, so.

PATRICK

39:36 Like twice as much.

TANYA

39:39 It depends we've got Dan talk about pricing, but we've got different tiers depending on, you know, what functionality you want. So.

--- Accounting integrations ---

DAN

39:47 Yeah. I mean, so far, you would definitely fall on the premium category and, you know, a couple of things to kind of unpack as far as pricing would go, we do have a suite of products, right? So, inventory management being one of them, time card, being another then integrations, you talk integrations, right?

--- Accounting ---

DAN

40:05 They didn't tag is a native integration and correct me if I'm wrong, Tanya, but that would be free for the client. However the stage 300 and the different connectors that would be different, that's the pricing for that depending on what kinds of things you wanna connected and sent over to them kind of... would need to, I guess develop



a little bit more of what you actually needed before we came into a specific... so for you.

*--- Accounting ends ---*

DAN

40:31 But I could, definitely, I think we could get most of the way they are, you know, after chatting with everyone on Friday for me to be able to put together a draft for you. Do you have a specific budget in mind or do they?

*--- Pricing ---*

PATRICK

40:43 It's all subscription base?

DAN

40:46 There will be some one time setup fee, but most, yes service trade is the annual subscription base.

PATRICK

40:54 Annual subscription. And then the... I don't know if they have a budget. I mean, these guys, they don't know. I mean, I asked him, hey, are you willing to, do you have any appetite for 80,000 dollars a year?

*--- Accounting integrations ---*

PATRICK

41:06 Just switch over to Sage intacct. And to me like maybe, you know, so it's like, alright, well, maybe it, the, as far as the interface, we'd want the best interface we can get, which one I would assume it's going to be this guy, Robert? Yeah.

TANYA

41:22 Yeah, yes.

PATRICK

41:23 That's going to be a chargeable interface.

*--- Accounting integrations ends ---*

PATRICK

41:25 Probably, I don't know bought, you know, because obviously, then we're going to have to go out and get a subscription for the Construction solution and we're going to have to get a subscription. If that doesn't include time piece, we got to get a subscription for the time for Lightspeed and we still have our back office product, you know? And then we're going to have to teach them that they don't have to set up

jobs anymore for every work order when we have to get them out of that, isn't gonna freak out, but they don't set up a job anymore.

DAN

41:52 Yeah, yeah. I think it definitely sounds like a mountain with a lot of loose rock hanging off of it that you're going to have to climb to put it together. But, you know, when you think about it, and some somebody said to me was the all will be small when you look for a product that encompasses everything you need for everything, right? Your businesses complex and service and Construction both have their own individual complexity. And I think service being a much more fluid and much more, I think a lot more busy work that goes on with service and a lot more moving pieces.

*--- Access to information ---*

DAN

42:26 I'm kinda putting your handle on that first might be a good option for you. And that's something we can absolutely help with. And when you think about it, you know, even product like apple, right? They don't have one application that runs the entire phone for you. This cut, you know, there there 200 different app you can download from apple in the app store and everyone uses a handful of, right?

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

DAN

42:46 And the same goes for a lot of different things. When you think of something that has to be all in one. I always think of a boat plane, right? Right? You'd love to have a boat and I'd love to have a plan. Let's put them together. Awesome. And what you get is this little ranking, Dang thing that lands on this lands on the pond doesn't impress too many people.

*--- Accounting integrations ---*

DAN

43:03 Probably doesn't have too much going on in the air either. So really, you know, best of breed is kind of our thought process as far as software goes. And that's why we do have an open API which will allow you to in the future as you add products and find those best of breed solution. It will allow you to integrate with service trade or forget custom connectors depending on the other application obviously.

*--- Accounting integrations ends ---*

PATRICK

43:27 Yeah, very. You're drinking the koolaid that's what they all say. Best three, we don't do everything because we can't nobody can. So we go out and find the best and breed. You've gotta go find the best of breed and integrate. I mean, I get it. I've been drinking that koolaid over a long that nowadays. I'm so I'm just like I tell my wife who does the same thing only if the property management there's nothing, we just have to be upfront and honest with the clients that here's what it is. You know, this is what it, I don't know what the future holds.

TANYA

44:00 Nobody.

DAN

44:01 Does?

PATRICK

44:01 Nobody called me the other day and say, hey, I heard Sage theory was going away and I heard that you were gonna retire and I heard and I go, hold on. Let me get my Crystal ball out. I'll look at.

TANYA

44:19 My Crystal.

PATRICK

44:20 Ball. So anyway, well, let's do a client facing presentation for the service side at eight 30.

--- Dispatch ---

PATRICK

44:31 Let me confirm that as soon as I get off the phone and lock me in on that, I bet Tanya doesn't necessarily need to be there for that, I don't think. But so you're going to be the presentation Dan?

DAN

44:41 Yes, sir. I'll have Dan the other Dan that was on yesterday with us. He he'll join me as well, I believe.

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

PATRICK

44:47 Hello?

DAN

44:48 So, yeah, I'll go ahead and send an invite over to you. Obviously just let me know if we need to adjust it. Would you like me to include any of their emails? Feel free to, you know, pass those along and I can add the.

PATRICK

44:58 Yeah. Send me the email and I'll respond to you with their emails. So, so who needs to be added? Yeah, I'll do that.

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

DAN

45:07 Okay. And one thing I did want to share with you before we go here... Pat was, so I started building this out as our conversation, you know, beginning. So this is a, it workspace essentially that you'll be able to share with your team and the elite team to walkthrough.

--- Customer engagement ---

DAN

45:24 Hey, this is what we've gone over so far. I can see our calls and reporting tier with you as well as different resources and the next steps as we plan those together. So this one specifically for your customers, right? How service trade is going to help engage with your custom.

--- Quote templates ---

DAN

45:39 So I can add a few of these sort of items that might be helpful to sort of preface our meeting on Friday, if you'd like. And what I can do is share that with you. If you choose to go ahead and pull the elite mechanical team on there as well before Friday, then you can actually add folks appear at the top workplace comments and say, hey, Dan, can you add them?

--- Purchase decision ---

DAN

45:59 Otherwise we can kinda see where things light after our meeting on Friday and if we'd like to add them to the workspace at that point, we can go ahead and do so. But do you think this would be helpful at all as far as the conversation?

PATRICK

46:11 Absolutely.

DAN

46:13 Okay.

--- Purchase decision ends ---

DAN

46:13 So I'll expect an email from me here this afternoon. I guess is it'll be afternoon for you? It's getting towards the even for me but it's not the email that invite you to this as well as the invite for eight 30 a long time on Friday. And was there anything else that... we needed to cover today or that you need from us? No?

PATRICK

46:38 It gets good. We will, I'll get those emails from you and I'll send you the links to include them. As soon as I get confirmation back to them. I might not get a backup first thing in the morning.

DAN

46:52 Yeah, absolutely. Well, definitely appreciate your time and looking forward to it on Friday and just let me know if anything comes up between.

PATRICK

46:59 Alright, thanks guys.

TANYA

47:00 I appreciate it. Thanks. Nice to meet you.

*The End*