

HVAC Software

HVAC Software designed to manage all aspects of the HVAC industry, including management of work orders, PM contracts, service agreements, equipment and history, estimates, GPS, remote access, field service, and accounting integration.



HVAC Industry Profile

The HVAC service industry includes a vast range of businesses. Examples of service businesses that are part of the HVAC industry would include Air conditioning repair, Heating and Mechanical, Refrigeration and Ventilation, Commercial and Industrial Mechanical Services, etc. HVAC contractors typically send service technicians into the field for installation and repair of customer equipment.

Software Features:

- **Work order life cycle** management includes all stages of the work order as it progresses through to completion. Whether the customer request begins with an estimate or a service call, the work order can progress through an organized and customizable filing cabinet type system. With two different customizable work order forms, all jobs can be tracked and never lost.
- **PM Contracts** can be setup for each customer including multiple sites and equipment contracts. Also known as **Service Level Agreements**, Preventive Maintenance contracts can be set to re-occur at any time interval. With the automation features available in the software program, PM contracts can automatically create service work orders for customers and even automatically schedule and
- With the optional **GPS Vehicle Tracking** solution, HVAC vehicle locations and status are displayed in real time on a detailed map including HVAC service calls, install jobs, estimates etc. The vehicle information is also displayed giving the location, speed, and vehicle status. GPS tracking reports include detailed maps of where the vehicle has been including speeding alerts and unauthorized stops. Unauthorized stops, or No-Go areas can be set within the software program along with speeding alerts and who the software needs to notify of these events.
- **Full accounting integration with Quickbooks** is also available. Providing seamless and easy flow of information to and from Quickbooks. Quickbooks estimates can be converted into work orders with a simple click. Inventory parts and items can be used on the work order just as they would in Quickbooks. Completed work orders can be sent directly into Quickbooks as an invoice or sales order. All customer information is transferred including custom fields and price levels.
- **CRM Customer Management and Customer Portal** allows HVAC Companies to provide their

HVAC Software

Service and Install of HVAC Equipment

AT A GLANCE:

Industry Profile:

HVAC Industry

Software Coverage:

Work order life cycle
Estimates, Install Orders,
Service Calls
PM – Preventive Maintenance
SLA – Service Level Agreement
EAM – Enterprise Asset
Management
Field Service – Mobile Solution
GPS Vehicle Tracking
Quickbooks Integration
CRM – Customer Management
Customer Portal
Dispatch Board and Scheduling
Mapping and Route
Optimization
Employee Time Tracking

Results:

Implementing an HVAC Software program such as Dispatched can revolutionize your business and create efficiencies and customer services your business has only dreamed about.





dispatch to the appropriate technician. This automatic scheduling feature is an optional feature that allows you to enter the service contract once and not have to touch it until it renews. Actual signed contracts can even be attached to the work order or customer.

- With the customer [Asset Management](#) program within the software, HVAC companies can track all customer equipment including service history. Unlimited equipment can be entered for each customer or customer site including multiple locations and warehouses. With eleven customizable description fields, each piece of equipment can include important information such as make, model, serial number, warranty information, manufacturer contacts, etc. With the mobile field service option, technicians can add, change, or update equipment while in the field.
- The [Field Service Mobile Computing Solution](#) allows your field technicians access to work orders, customer equipment, and inventory parts. HVAC technicians can view and update work orders in real time. HVAC Salespeople can even provide customer estimates on sight, capture the customer's signature electronically and submit the signed estimate back to the office in real time while in the field. HVAC technicians even receive detailed maps to the customer's job site, imagine no more wasted time and money on map books. HVAC technicians can review customer equipment and service history.

customers with many options. Customer information can include all contacts, emails, equipment, phone numbers, and multiple job sites. With the optional customer portal, HVAC companies can provide their customers with a login and password. Using the internet your customer can then login and submit service requests for multiple sites and review service history and equipment information. Service requests then get automatically entered into the software system with notification to the appropriate office personnel.

- With the [Dispatch Board and Schedule](#), jobs are color coded according to type and priority on the calendar. Scheduling and rescheduling jobs is a simple drag and drop. Multiple HVAC crews can be assigned to a single job. Daily and weekly views of the dispatch board allow you to always see which technician is open and the jobs in progress.
- With the integrated [Mapping and Route Optimization](#) multiple jobs can be selected and dropped on the schedule. The software can optimize the order that work orders are scheduled for maximum efficiency and shortest drive time.

Dispatched HVAC Software will increase productivity, eliminate lost paperwork and double entry, increase efficiency, automate the work order life cycle, and revolutionize your HVAC business...

HVAC Salespeople can even provide customer estimates on sight, capture the customer's signature electronically, and submit the signed estimate back to the office in real time, while in the field.

FOR MORE INFORMATION VISIT:

DeFNiC Software and Consulting
www.dispatchedsoftware.com

Quick Books
<http://www.quickbooks.com>

Our product and QuickBooks Financial Software work together to help simplify your business management. QuickBooks 2006 Financial Software helps you get more done faster, with a new Home page, simplified Customer and Vendor Centers, and sophisticated business planning tools.

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