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## **HVAC Software Tools Make a Difference**

*Contractors Choose Packages that Improve Business Operations*

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Successful contracting firms typically want to make the best use of their time and resources, which is why most rely heavily on robust software packages to keep their businesses running smoothly. To make sure they invest in the right software, owners and/or managers often dedicate copious amounts of time to researching which packages make the most sense for their businesses. This can be a daunting task, as there is a wide variety of software packages available for contracting firms, and most vendors are constantly improving their offerings.

But with an economy that is still weak in many parts of the country, making the time to choose the right software package is an important step toward improving the bottom line.

### **Wrightsoft to the Rescue**

[PBCI-Allen Mechanical and Electrical](#), State College, Pa., is a case in point, as it is growing at a time when the Pennsylvania economy is still struggling. Fewer projects have led to tougher competition, and the transient nature of this college community means the firm usually only has one chance to make a good impression.

“Everyone’s always on the move, and we’re constantly demonstrating our capabilities to new customers,” said Dave Bloom, comfort specialist, PBCI-Allen. “As a result, we get good at showing the customer the value of doing business with us very quickly. A competitive, accurate bid, delivered quickly, does wonders.”

To create that bid quickly and accurately, the eight residential installers at PBCI-Allen have come to rely on [Wrightsoft’s Right Mobile Consultant](#)(RMC), a versatile, cloud-based tool that automates a repeatable sales process. Designed to work with many devices, including desktop computers, laptops, and tablets, techs can quickly complete an Air Conditioning Contractors of America (ACCA) [Manual J calculation](#) on site. Generating proposals and determining return on investment (ROI) with the software is simple, said Bloom, once the load calculation is complete.

“It’s a user-friendly tool that makes me look good in front of our customers,” said Bloom. “It has standardized our sales process and given us a professional feel that would be tough and expensive to duplicate otherwise. It shows the homeowner that we take their business and their comfort seriously. Our profitability has also improved as a result of the [software’s] accuracy.”

[Thornton and Grooms \(T&G\) Heating and Air](#), Farmington Hills, Mich., is another company that has come to rely on Wrightsoft to help boost its bottom line. Located just outside the economically challenged city of Detroit, Dave Knight, sales and marketing manager, T&G, has found that investing in Wrightsoft's Right-Suite Universal in the office and Right J Mobile in the field has improved the accuracy and speed of his technicians while giving them a more compelling way to engage and interact with customers.

"Investing in heat load sizing software has strengthened the work that our field techs and estimators are doing in the field," said Knight. "And with better software, we've been able to tighten our estimates while giving our techs a range of options, each with a price that reflects choices made by the homeowners."

Right-Suite Universal offers integrated residential and commercial software consisting of 20 modules, all of which are automatically updated. Users select capabilities that meet their needs, from ACCA's Manual J, Manual D, and Manual S, to ASHRAE's Radiant Time Series, as well as geothermal loop design, operating costs, proposals, and bills of material.

"When we're using the Manual J load calc software in the field, we know we're making sound recommendations," added Knight. "There's no guesswork. With the software, it's clear to customers there's value in the extra work we do prior to the installation. It gives us a competitive edge."

### **Show and Tell**

HVAC Showroom is a unique software product designed to help educate consumers about different residential HVAC products. Developer [Opportunity Interactive](#) has accomplished this by combining interactive animations with engaging media components to create an informational experience that educates homeowners about the many features and benefits of HVAC equipment and accessories.

Edward McFarlane, general manager, [Haller Enterprises](#), Lititz, Pa., likes the software, because, "It's not us just telling the customer what they get, it allows them to see and hear it, too. It's like a virtual showroom. Being able to demonstrate product benefits with animations and video has made it a lot easier for homeowners to choose higher efficiency and quieter equipment. We've also found it much easier to communicate effectively to homeowners the importance of having programmable thermostats, air cleaners, and other accessories. Our closing ratios with all of these products have risen remarkably."

Introduced in 2008, HVAC Showroom contains product animations that show how a wide variety of HVAC equipment works, how it sounds, and how much it will cost to operate. For example, the heat pump animation shows how both standard and multi-stage units work, and various tools can help calculate the average hours a year a heat pump runs while comparing operating costs across different fuel types. There's also a Balance Point calculation tool that allows entry of specific heat pump models to see a projected balance point for the home. Other equipment detailed in the software includes air conditioners, filters, gas furnaces, hybrid systems, and geothermal systems.

One popular feature of the software allows continuous replay of showroom animations for use in the home or at trade shows. This feature works well for sales presentations, noted the company, because it provides the homeowner with audio and visual interaction. The company also offers an interactive Web version of the HVAC Showroom with animations that can be used on any website.

Dusty Davis, sales manager, [Trinity Air](#), Peachtree City, Ga., noted that since using HVAC Showroom, his sales have risen to a whole new level. "I am closing more high-end, high-profit jobs than ever. One of my customers wrote us a letter stating, 'Dusty used his showroom software to help me understand how I would benefit from replacing my system. It was extremely educational and had me sold right away.'"

## Elite Choice

One of the very first companies to offer software designed for HVAC contractors was [Elite Software](#), which rolled out ACCA Manual J load calculation software, called RHVAC, in 1984. Updated regularly ever since, this Windows-based program now performs HVAC load calculations in accordance with the eighth edition of ACCA's Manual J. Simple fill-in-the-blank forms make data entry easy, while all load factors are automatically looked up and applied.

RHVAC also includes a complete ACCA Manual D calculation for the sizing of ductwork, as well as Manual S equipment selection reports and simple sales proposals. Many add-ons are also available, including a computer-aided design (CAD) drawing system, bill of materials, and a graphic proposal maker. New enhancements to RHVAC include a sloped ceiling area calculator, which determines the area of a room's sloped ceiling with entry of just a few dimensions; an ACCA design review form, which saves time if local authorities require this information; and hourly room net gain, which helps assign rooms to specific zones based on peak loads.

Danny Gough, principal, Energy Solutions Inc., Lewisville, N.C., can't even remember when he started using RHVAC, but he does know that the first time he bought it, it came on 3 ½-inch floppy disks. "Simply put, Elite works. Our company does Energy Star labeling of new homes and code compliance consulting for builders and homeowners, and RHVAC allows me to export the data to the Home Energy Rating software and the energy code compliance software, which saves tons of time. I simply create an export file and then open the companion rating or code compliance software, import, and voila, the inputs are already there."

Like Gough, Paul Wieboldt, owner, [Tradewinds Appropriate Technologies LLC](#), Waco, Texas, has been using RHVAC for a long time; not only in his own HVAC business, but also for third-party load calculations for other contractors. "We adopted the early DOS version of RHVAC 20 years ago, so we could actually determine a load rather than trying to apply the dubious 500-square-feet-per-ton rule of thumb."

Initially, Wieboldt ran load calculations on every sales call as part of his free estimate, but he soon found that while this resulted in useful data, it did not usually end with a sale. Then, one day his son decided to ask customers to pay a small fee for the load calculation, and that ended up being a very successful approach.

"We learned that this small investment turned out to be the unspoken down payment for the rest of the job. If they paid us to run the RHVAC Manual J8 calculations, 90 percent went on to sign the contract for the system installation," said Wieboldt. "We also found that charging to right size the system sorted out who our real customers were — those who did not want to make that small investment in doing it the right way were never our clients anyway."

Another benefit, said Wieboldt, was that it allowed him to have a full-time employee performing Manual J loads, which turned this activity from being an expense to being a profit center. Finally, it established the scope of work for all subsequent bidders. "Since we established the correct design and the homeowners owned it, other contractors had to bid apples to apples, which some refused to do. RHVAC allowed us to offer our design services, give our customers the right answer to their load sizing questions, and get paid for it."

## Streamlined Design

In 2000, [dESCO](#) introduced its Windows-based service management software, ESC, which replaced its legacy solution that was first brought to market in 1980. With roots as an HVAC company, dESCO designed ESC to be a complete solution for contractors to manage customers, work, and finances. From service call and technician scheduling, to service contract management and inventory tracking, ESC streamlines the entire workflow through one comprehensive solution, thus improving productivity and increasing profitability.

Sam DeAngelis, CEO, [Colorado Climate Maintenance Inc.](#), Englewood, Colo., started using ESC in 2003, when he was looking for software to help manage his service technicians' schedules, but he found an added benefit: "Being able to have a single point software that allows us to completely manage and track our customers is huge. It allows us to easily access history, equipment information, and agreements while we're on the phone with a customer, so we have all the history available to us at our fingertips. I think that impresses our customers, because they feel like they're the most important person to us, even though we may not have talked to them in six months."

Some of ESC's main features include customer account management; scheduling and dispatching; service agreement management; quoting and invoicing; sales and marketing management; flat-rate pricing; equipment tracking; inventory; purchasing; and seamless integration with QuickBooks, Sage, and ESC accounting software. DeAngelis is also a fan of ESC Mobile, which transfers all relevant information, including customer history, equipment, tasks, etc., seamlessly to technicians' mobile devices. "This improves our performance and sets us apart from most of our competition because we're not floundering when we get to the job site."

It has been such a time-saving tool that DeAngelis estimated the dispatcher now has 90-120 minutes more each day to do other tasks because technicians rarely call in anymore. "On top of that, it has increased our efficiency and our accuracy. Our guys know where they're going, and they have a detailed list of the tasks ahead. This has resulted in greater accuracy, which has caused our callbacks to drop off significantly." Finding the right software package can be a challenge, but it can make a huge impact on a contractor's bottom line.

#### **SIDEBAR: Choices to Make Life Easier**

Besides those listed in this article, there are other solutions available that HVAC contractors may want to consider, including the following:

**Airxchange's AIRX Estimator for the Environment** is a free online estimation tool that quickly calculates the positive environmental impact and potential energy savings when commercial buildings utilize energy recovery ventilation (ERV) technology.

This tool helps building owners, energy engineers, and facility managers quickly quantify the CO2 reduction by energy source for specific buildings by inputting three pieces of information: city location, number of occupied building hours, and cfm of outdoor air. For users not aware of a building's cfm of outdoor air, the AIRX Estimator provides a cfm estimator based on ASHRAE standards.

Corrigo offers WorkTrack for companies in the HVAC industry. This Web-based work order and service management application provides a complete solution for tasks like invoicing, time card management, and payroll, as well as full reporting capabilities for work orders and services agreements.

WorkTrack includes wireless dispatch and full mobile integration with iOS, Android, and BlackBerry devices, making it easy to dispatch personnel to areas where work needs to be done, while providing a

platform where users can monitor multiple projects happening simultaneously in the field. This results in more efficient dispatching and more responsive service to customers.

Dexter + Chaney, developer of Spectrum® Construction Software, offers a complete service management solution for contractors that includes work order management and service dispatch. This new service management software operates seamlessly with Spectrum Construction Software and works completely in the cloud, requiring no software download or specific hardware devices. With this new application, managers, dispatchers, and technicians can connect to the full set of service management features wherever they are, using any device with a Web browser.

Smart Service is scheduling and dispatching software that was created with the HVAC service and repair industry in mind. Smart Service works with QuickBooks to completely eliminate double data entry between scheduling and bookkeeping software.

It also has an intuitive drag-and-drop scheduling screen, which allows a business to schedule or reschedule jobs quickly and effortlessly. Smart Service also offers a mobile work order management application called iFleet, which empowers mobile technicians with accurate time tracking, job-to-job directions, work schedule, and customer contact information.