

The background of the slide features a blue-tinted photograph of an HVAC technician's equipment. On the left, a tan-colored tool bag with multiple pockets and straps is visible. To the right, a manifold gauge set is shown, with its three colored hoses (red, yellow, and blue) connected to a central brass manifold. Two circular pressure gauges are attached to the manifold, displaying various pressure scales. The entire image is overlaid with a semi-transparent blue filter.

# ∞ NUAGE

A Pyrus Company & Cloud Solution Provider

## ERP FOR HVAC



## FINDING THE RIGHT ERP SOLUTION FOR YOUR BUSINESS

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Due to the increase of technology, regulations, and efficiency, the HVAC Industry has seen a rapid level of demand.

With so many levels of complexity, there are certainly a multitude of challenges that face the HVAC industry and the right Enterprise Resource Planning (ERP) system can alleviate many of these issues.

“The goal as a company is to have customer service that is not just the best, but legendary.”  
- Sam Walton



Enterprise planning ultimately helps tie a company together. The more complex the business processes are, and the more resources and assets being used, the more vital enterprise resource planning is.

Nearly every business is a conglomeration of various departments and processes. Even seemingly simple business processes can be complex and involve a large number of moving parts. Managing all of these moving parts in a complex, dynamic environment can be difficult.

Fortunately, Enterprise Resource Planning (ERP) can be used to help coordinate and integrate resource planning. ERP software was designed to manage inventory, purchasing, sales, human resources, finance, marketing, staffing, and more.

# ERP Software for the HVAC Industry

The HVAC industry is competitive, dynamic, and fast-paced. When HVAC issues arise, most customers and clients will want it fixed as quickly as possible, and they want lasting solutions. Businesses can't afford to be shut down, and families can have their lives disrupted if a problem with their HVAC system occurs.



Consider the fact that **over 103 million homes in the U.S.** have air conditioning units.

As such, demand for HVAC services is high. Some even call it the radical age of uberization.

“Being properly prepared is one of the biggest assets in business.”

-Keeth Smart



## *ERP Software and Dispatching*

Many HVAC companies are often required to service customers over massive geographical footprints, and individual HVAC systems often require highly specific parts and tools. Meanwhile, HVAC companies will often have numerous teams in the field, and these teams may not all possess the same levels of skills and training.

Let's look at how ERP software can help with geography, adjustments, and variables specifically.





## Geography: Make Large Distances Smaller

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Traveling consumes time, wages, and resources (especially skilled talent). Every HVAC company wants to minimize the time spent on the road and maximize time spent solving their clients' HVAC issues.



Leveraging Sention Field Service & NetSuite ERP software can help to set route and schedule appointments, thus optimizing time and cutting down on distances traveled. This is how you ensure that customers are at the heart of your service business.

## Variables: Keep Everything Under Control

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There are many variables in the HVAC industry. For instance, different HVAC systems will require different parts and tools. ERP software can be used to track inventory and analyze needs – both past and present.

A particular client, for example, might frequently need a certain part or tool. On the other hand, only certain staff members may be able to handle the HVAC system at a specific location. With ERP software, keeping all of these many variables straight is more manageable.

This is about getting the right products, at the right place, at the right time. It's difficult to effectively manage customer expectations if you don't have control of your inventory.

ERP software helps track inventory in real-time, allowing HVAC companies to see where each part and tool is at any given moment. ERP software also makes it easier to plan how to disperse inventory and ensure everyone has what they need to get the job done.

## Manage Maintenance and Compliance



Many HVAC systems require regular maintenance in order to prevent expensive breakdowns and also to ensure that the system meets government regulatory requirements. If any of this is mishandled, the client could suffer greatly, while the HVAC company will have to deal with additional and ultimately unnecessary headaches.

ERP software can be used to track warranties, manage equipment life cycles, and maintenance appointments. This will make it easier for both the client and the HVAC company. Now, your office is with you in the field.

# Why Nuage

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Levering NetSuite's world-class ERP capabilities & Sention Field Service, Nuage's HVAC specialized solution includes these relevant features for your business:

- 🔗 Human Capital Management
- 🔗 Warehouse and Fulfillment
- 🔗 Financial Management
- 🔗 Order Management
- 🔗 Procurement
- 🔗 Production Management
- 🔗 Supply Chain Management
- 🔗 Equipment Lifecycle Management
- 🔗 Service Contracts and Warranty Management
- 🔗 Service Metrics and Reporting
- 🔗 Work Order Management
- 🔗 Mobile Field Service Management
- 🔗 Inventory Management
- 🔗 Scheduling and Dispatch





# Take-Away: ERP Software Allows You to Compete

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Managing business processes can be difficult. There are so many processes, variables, clients, and other factors to oversee. By centralizing data, coordinating efforts, and using a central management platform, a HVAC company will be able to secure efficiency and productivity improvements.

This will ultimately allow your company to compete in even the most competitive markets. Plus, as business environments change, you'll have a section that will react more quickly and perhaps even proactively. Those who fail to use ERP software will struggle to adjust their processes and manage workflows. This could result in falling permanently behind.

*Take care of your business,  
from anywhere, with Nuage.*

Our approach to HVAC is unique.  
See how we help companies  
exactly like yours.

 **NUAGE**  
A Pyrus Company & Cloud Solution Provider

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