

# Epicor for HVAC Wholesalers

## Functionality

- ▶ Front counter
- ▶ Quote-to-order
- ▶ Order history
- ▶ Accessory items
- ▶ Link items to outside files
- ▶ Advanced seasonal inventory control
- ▶ Assemblies
- ▶ Disassemblies and modifications
- ▶ Lot billing
- ▶ Job-based pricing
- ▶ Serial number tracking
- ▶ Rebate management
- ▶ Warranties
- ▶ Service and maintenance

## HVAC Wholesalers

Today's leading HVAC wholesalers, including Mechanical Equipment Company and HVAC Sales & Supply Co., Inc., trust Epicor solutions to manage their business efficiently. A member of the American Supply Association (ASA), the Heating, Air Conditioning and Refrigeration Distributors International (HARDI), WIT & Co, and other associations and buying/marketing groups, Epicor Software Corporation is dedicated to serving the technology needs of the HVAC wholesaler industry. Epicor technology experts have spoken at many industry conferences and have authored articles for Supply House Times and The Wholesaler.

Because Epicor seeks to provide HVAC distributors with the best solutions to help them meet their business goals, Epicor regularly seeks out the input of its HVAC customers in the development of its solutions and services.

## In Your Industry

As an HVAC wholesaler, you face new challenges every hour of the workday. Before dawn, contractors rush your front counter for compressors and electric thermostats for their day's jobs. By mid afternoon, your warehouse staff might prepare the day's eighth shipment of duct, fittings, and boots for a new housing project. At 4:30 p.m., you might need to help a contractor who suddenly has spec changes and needs new pricing.

## A Comprehensive Solution

You need an enterprise software solution that helps you meet the industry-specific challenges you face on a daily—and hourly—basis. Epicor provides that solution with the front counter capabilities to handle the customers that come in before dawn, the pricing features essential for different customers' billing needs, and the scalability to store tens of thousands of different part numbers and item details.

Epicor enterprise software solutions will help you increase sales, improve customer service, and reduce operating costs, all while better managing your daily processes and streamlining operations. Packed with functionality designed to address the requirements of your distinctive business needs, core features include order and inventory management, purchasing, pricing, financial management, customer relationship management, business reporting and analysis, e-business, and warehouse management.

Additionally, as an HVAC wholesaler, the features you benefit from include the ability to link go-together items so that your service reps always know which compressor to offer with an air conditioning unit. Epicor offers the ability to assemble anything from heat pumps to humidifiers, while tracking usage and building sales history on both the component and finished product levels.

You can even use your Epicor solution to manage your customers' inventory, a value-added offering that is growing increasingly common—and expected—in the industry.

As an HVAC wholesaler, you need a technology provider who understands your needs. You must also choose a business partner with wide-ranging industry expertise, and a vision to help guide you into the future.

Epicor offers both. When you partner with Epicor, you can expect only the best in technology solutions and professional services, as well as the industry-specific functionality you need to drive your business. Epicor understands the HVAC industry and can help make your business better.

## Front Counter Capabilities

As an HVAC wholesaler, you probably experience a rush of customers at your front counter every morning, requesting everything from gas fittings to registers. Their only common demand is that they need your products now.

With your Epicor solution, you have the front counter capabilities necessary to handle that early morning rush quickly and efficiently. You can help any customer on the spot by accessing your entire inventory from the Order Entry screen, offering a price, placing the order, then accepting payment or recording the transaction for invoicing.

Also, you can apply any cash or credit card deposits against an order—avoiding the accounting nightmares of placing a customer's money in an envelope or keeping financial information on a list near the register.

Additionally, many customers will call your front counter and request to pick up a piece for a job later in the day. In this case, your solution prints out a special “Will-Call” pick-ticket for the warehouse, ensuring that valuable time isn’t wasted preparing an order for shipment.

## Can I Quote You?

In the HVAC industry, quoting prices for 50 line-item orders is a daily—if not hourly—practice. You can easily turn those quotes into orders, saving customer service representatives’ valuable time and reducing errors.

You may even find that you have five contractors who are bidding for the same job—translating into five contractors requesting quotes for the same group of 200 line items. You can re-use and copy that quote from one customer to another. And, since suppliers often offer different customers different prices, the solution will automatically adjust pricing accordingly, ensuring you maintain excellent relationships with your best clients.

## What Goes Together Stays Together

If you sell pipe, do every one of your sales and service representatives know—or remember—to offer contractors the accompanying black or gas fittings?

Epicor solves this issue by automatically “suggesting” products that go with items on a customer’s order, helping increase sales and improve customer satisfaction. Plus, it saves time, since service representatives do not have to flip through catalogs to find accessory items and know to offer your customers the choice of plastic or stainless steel fittings when they buy pipe.

## Link and Display The Information You Need

HVAC contractors often request expanded parts lists for air conditioning or heating units. For decades, many suppliers resorted to keeping this information in a file cabinet or buried under piles of paper.

Store and create links to images, spec sheets, installation instructions, and much more, ensuring that all the information you and your customers need is at your fingertips and available at a moment’s notice.

## Inventory Control

Excellent inventory control is vital to the health of your business, and tracking your inventory effectively is key to maintaining good customer service and manageable stock levels. Strong inventory management capabilities help you meet service levels without investing too many valuable dollars in stock.

Plus, it’s the nature of the industry: certain items go in and out of style or are regularly replaced by newer, more innovative products. Track customer buying trends so you always know which thermostats are most popular. This helps ensure that you keep the right items on your shelves at the right time, and reduces the chance of today’s investment becoming tomorrow’s dead stock.

Epicor also understands that the HVAC business is very seasonal. Your customers buy air conditioners in the spring and summer and heating units in the fall and winter.

Epicor helps you to turn inventory before it goes out of season. For example, when the solution produces POs for September, it uses the previous year’s historical data to create orders for seasonal items—instead of producing reports based on previous months’ usages.

As a result, even though you may have sold 2,000 air conditioning units during the months of June, July, and August, the solution doesn’t recommend that you order a similar quantity for September, October, and November, ensuring that 800 air conditioners are not sitting on your shelves in the middle of February.

## Get It Together: Assemblies

Light manufacturing functionality enables you to list items like fully assembled pumps in your solution, at one price with one item code, eliminating the need to re-enter a long list of line items each time you sell and assemble the items. This saves order-entry personnel time and prevents costly errors and mix-ups. Customer service representatives can also increase sales by up-selling assembled or manufactured products when customers request groups of items.

The same functionality also takes the guesswork out of determining how many items or kits you can assemble with what you have in stock. When your customer calls to request an item with more than one part, the solution

searches your database, finds all of the components necessary to manufacture a kit or assembly, and calculates the least common denominator of these pieces. In seconds, customer service representatives know exactly how many of a particular kit they can offer your customers—without taking a walk to the warehouse to manually find and count SKUs.

## Break It Down: Disassemblies and Modifications

Sometimes it's easier and more profitable to purchase completed assemblies or kits from a supplier and then modify them to meet customers' needs, or break them down into separate SKUs to stock and sell. With disassemblies capabilities, you can bring an assembly or kit into your warehouse, tear it down, and sell its individual components through return-to-stock functionality, allowing you to sell an assembly without a certain component—or even exchange one component for another.

So, if your customer wants a standard pump with a custom fitting, you can exchange one fitting for another, and return the initial fitting to stock for sale to another customer. Efficiently track and organize inventory that might normally end up being discarded—saving you time and money—all while keeping your customers happy.

## Lot Billing

Contractors handling huge projects—like installing air conditioning units in an office building—often want to order all of the parts necessary for the job up front to ensure that everything they need is on hand when they need it.

But, they want to receive the material in stages and to pay for it as they receive it. Lot Billing capabilities enable you to first deliver and bill the contractor for rough-in materials, then invoice and deliver finished goods at a later date.

As a supplier, you benefit from Lot Billing capabilities, too. When contractors submit requests for quotes for large projects, you can give them one price on the entire lot, or individual lot prices for rough-in or finished goods. Quoting items in this

manner prevents customers from shopping around and pricing goods individually, increasing your sales volume and improving your profit margins.

## Job-Based Pricing

If your customer needs 20 compressors for a housing development, and you offer him special pricing for those units—and those units only—tracing that information manually can be time-consuming, labor-intensive, and confusing, negating any value you or the customer may have received from initial pricing negotiations.

Establish job-specific pricing schedules through your solution, automating and simplifying the process. Job-based pricing functionality ensures you pass on the best possible value to your customers so they can factor special prices when calculating their own quotes. You benefit from more organized processes, a better ability to track information, and repeat customers.

## Serial Number Tracking

Because it is vital for manufacturer warranties and recalls, you must track serial numbers on big-ticket items like air conditioners, heat pumps, and furnaces.

Record the serial numbers on everything in your warehouse and get flexibility in how you track this information. For example, you can record item serial numbers as they enter your business to produce detailed inventory reports. Or, you can enter them into the solution at the point of sale. It's your choice—after all, it's your business.

In summary, Epicor combined its industry knowledge with technology expertise to develop the right solution for HVAC wholesalers.





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## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).

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