

# A Comprehensive Cloud-based Suite of Sales and Operations Tool

## About the Client

Our client is a leader in developing and providing innovative sales, management, and technology solutions for the HVAC and subcontractor industries. They have been in business since 1998 and InApp has been working with them from 2003 in developing various software applications for their different business needs.

## Business Challenge

- The client's existing management tool required to be migrated to cloud to enable ease-of-access.
- The existing application also needed to be re-engineered to include additional features and functionalities depending on the current industry standards.
- Since the client was initially using a paper-based process during the HVAC installation, they needed a complete digital transformation of their installation process at the customer site.
- The new process and application should reduce the cost of individual transactions and improve the operational efficiency of the sales and managerial staff.



Thank you. InApp does great work which makes us look good. We thank the whole team at InApp for being part of our success.

— President and Co-founder

## InApp's Solution

InApp designed a comprehensive suite of sales and operations solution that met the objectives of automating and streamlining the sales processes for HVAC dealers. It was designed as a cloud solution that enabled HVAC dealers to perform load calculations, generate proposals, reports and keep track of their tasks. Further, the solution enabled field technicians to calculate load and generate proposals at remote customer locations. Being a hosted solution, it helped reduce the cost of individual transactions and improve the operational efficiency of the sales and managerial staff.

The application developed using Microsoft .NET has two parts - Sales Presentation and Estimation (Sales Module) at the front end; and Sales Management and Reporting at the back end. The Sales Module is used on-site to generate proposals. The Management Module is used by the managers to monitor all sales force activities. Using the touch display interface provided for the LoadCalc Module, the field force can quickly perform load computations for the homeowners, thereby providing a personalised experience. The application can also be integrated with an interactive product catalogue called HVAC Showroom which makes this an invaluable tool for salespeople to educate their customers about high-efficiency products.

## Business Benefit

- The application facilitates the re-engineering of a series of sales force tasks into a comprehensive operational process.
- A comprehensive cloud-based easily accessible multi-tenant application.
- Greater operational visibility into the sales process and better control of sales activities.
- Substantial business benefits through reduced operational costs and increased profit margins.
- Using the newly designed tool, HVAC dealers are able to perform product installation at the customer site without any hassle. The transactions are digitalized and stored for a better understanding of sales and operations.



InApp is a software services company operating since 2000. As a world-class business solution provider, we are passionate about technology and building transformative business solutions that empower our clients worldwide, ranging from Fortune 500 companies to SMBs. We take pride in being a technology partner for the long haul, delivering exceptional value to customers through innovation and excellence. We offer an integrated portfolio of software services including Application Services, Software Product Engineering, Disruptive Technology Solutions, DevOps, Mobility Solutions, Independent Testing and more.