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SIMPLE HVAC ESTIMATING SOFTWARE

Price HVAC Jobs and Projects with Precision

ServiceTitan's HVAC Estimating Software for Commercial and Residential Contractors

Our HVAC estimating software simplifies pricing on any type of HVAC job or project, quickly calculating construction estimating costs for time, materials, and margins with a cloud-based estimating tool.

Streamline the HVAC Estimating Process

ServiceTitan's estimating and project management software helps commercial and residential HVAC contractors save time and close more jobs in the construction industry with customizable estimate templates and instant financing.

Accurate Estimates

Sell more jobs from the office or field using HVAC takeoff software to draft detailed job estimates.

Jobs Priced Right

Calculate labor rates and material costs—and win more HVAC customers—with an accurate cost database.

Polished Proposals

Provide job estimates via professional, digital plans with photos, services, and material costs.

Profit-Growing Sales Tool

Empower techs to sell add-ons via our mobile app to commercial and residential jobs, using HVAC estimating templates.

“If we want to raise our price, I can do it in literally an hour, (and) we can distribute it out to the technicians.”

Adam Bardi

Bardi Heating, Cooling & Plumbing

Discover HVAC Estimating Software Tips and Advice

Learn about HVAC software from the pros—from evaluating HVAC estimating solutions to discovering the key features offered by ServiceTitan that will help your commercial or residential HVAC business close more jobs.

Three blog/tool thumbnail/links to:

1. [4 Key HVAC Estimating Software Tips](#)
2. [HVAC Labor Rate Calculator](#)
3. [Building HVAC Estimates That Close](#)

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What is The HVAC Estimating Process?

Here's a brief guide on the HVAC estimating process ([read our full guide here](#)).

1. **Review the Bid Request:** Keep in mind any unique project requirements, pacing and duration of the project, who is supplying materials, what billing structure and payment terms you are agreeing to, and how change orders will be handled.
2. **Review the Drawings and Plans:** Do you have multiple sets of PDFs or digital plans? Look for any variances from your standard practices that could affect the amount of time you'll spend on the job.
3. **Perform a Quantity Takeoff:** Determine accurate counts of all the materials you'll need for the job to create accurate estimates. Some HVAC contractors use takeoff software such as Planswift, FastDuct, or Trimble, to create an estimating system. Others rely on Microsoft Excel spreadsheets.
4. **Estimate Your Material Costs:** Ensure your material costs are up-to-date by using a [digital pricebook](#) that integrates with industry supplier catalogs for HVAC, plumbing, and electrical materials.
5. **Calculate Your Labor Costs:** A best practice for pricing labor is to calculate a billable labor rate for profitability and then use that in pricing [flat-rate](#) services.

6. **Understand Your Overhead Costs:** It's essential to know your overhead percentage that goes toward paying all your fixed and variable costs, and to apply that to your pricing calculator.
7. **Price the Estimate for Profitability:** Once you've considered labor, materials, and overhead, calculate your final bid price to ensure you make your desired profit.
8. **Create and Deliver Your Proposal:** Follow best practices, deliver your proposal in the format specified by the client, and make sure you follow up.

What Is HVAC Estimating Software?

HVAC estimating software equips commercial and residential field service businesses with tools to price HVAC projects right every time and grow their average ticket size. With a mobile-equipped estimating program, HVAC contractors can quickly calculate costs for time, material pricing, markups, and profit margins to enhance the customer experience and close deals.

Some HVAC companies and general contractors use specific bid management and takeoff software to manage their estimating process. Others choose field service management software like ServiceTitan to manage their entire HVAC business.

Standalone Estimating Tools vs All-In-One HVAC Contractor Software?

While there are some great standalone mechanical estimating software and takeoff software solutions available, HVAC companies that use them also need to buy additional solutions for other core business processes like customer communication, dispatching, and bid follow-ups, to name a few. Using disparate tools that don't always connect seamlessly to one other is a less efficient way to run your business, especially if you want to scale.

In contrast, the best HVAC all-in-one contractor software like ServiceTitan:

- Offers fully integrated software features such as scheduling, dispatching, payroll, and invoicing.
- Reduces the number of tools you need to invest in so you spend less time toggling between analog channels and software solutions.
- Helps you manage and streamline your entire HVAC business in a single platform so your business can grow.

How Does ServiceTitan's HVAC Estimating Software Work?

ServiceTitan's HVAC estimating software is an industry-leading end-to-end management solution that's used by over 100,000 HVAC, plumbing, and electrical contractors.

Features include:

- **Fully integrated pricebook** to create profitable estimates
- **Advanced CRM** to streamline communication between field and office

- **Dispatching tools** to assign the right techs on the fastest routes
- **Tracking features** so that all estimates can be followed up
- **Integration** with other business processes such as payroll and accounting
- **Mobile app** so estimates can be created wherever your techs are

Designed specifically for the trades, data received from commercial HVAC contractors using ServiceTitan shows:

- **16% average increase in annual revenue growth**
- **9% average increase in revenue per technician**
- **10% average increase in invoices paid on time**

What are the Benefits of ServiceTitan's HVAC Estimating Software?

The core benefits of ServiceTitan's estimating software include:

- **Accurate Estimates:** Service Titan's Pricebook Pro gives HVAC techs access to the catalogs of a range of key industry suppliers so the prices reflect the actual materials that will be used (rather than a generic placeholder or standard price often offered by standard software).
- **Automated Pricing Updates:** Pricing updates are performed regularly and automatically, so there's no need for manual updates. Adjustments are reflected across the entire web-based pricebook and are accessible to all office staff and techs instantly (via mobile tablet or desktop).
- **Mobile Estimates:** Your techs can use pre-built estimate templates or create estimates from scratch to present Good-Better-Best proposals to customers with financing options and close more deals in the field.
- **Fast Estimate Turnaround:** Use simple tags and filters on your ServiceTitan dashboard to track and follow up with customers who haven't responded to estimates.
- **Advanced Customer Support:** ServiceTitan's CRM functionality means that when a customer signs off on a proposal, this can be viewed in real time back at the office. This allows staff to see the scope of work and begin locating parts, and build material lists for the fastest turnaround possible and optimal project management.
- **Optimize Communication:** ServiceTitan improves communication with updates that sync instantly between the office and your technicians, whether creating invoices and estimates or capturing check or credit card payments. Our real-time updates eliminate double data entry and decrease the potential for error.

Can HVAC Techs Create & Access Estimates From The Field?

Yes. Your HVAC techs can access and create estimates by using [ServiceTitan Mobile](#). Our cloud-based mobile app (available on Android and iOS) is highly intuitive and user-friendly.

HVAC technicians can access customizable estimate templates and create [Good-Better-Best](#) proposals while out in the field by selecting [pricebook](#) items and attaching them to the relevant photos and visuals. This helps explain the specific need for each repair or HVAC service and enhances customer satisfaction.

Techs can also view upselling opportunities such as [service agreements](#) or generate estimates to renew an expiring membership, right on site for better customer support.

These features (and more) help your techs combine your dynamic, customized pricebook with the seamless execution of estimates to [close more sales](#) and [increase revenue](#).

Does ServiceTitan's HVAC Estimating Software Integrate with Other Business Processes?

Yes. Because ServiceTitan is more than just an estimating software solution, it integrates your [estimating process](#) with the entire HVAC workflow, from estimates and [dispatching](#), to invoices and payments. This saves the time it would take to use different software and processes and reduces the likelihood of input and transfer errors.

Once the customer has agreed to the estimate, ServiceTitan lets you:

- Generate electronic purchase orders and order HVAC equipment and materials.
- [Schedule](#) and [dispatch](#) the [work order](#).
- Generate the [HVAC invoice](#), send it via email to the customer, and automatically file it electronically.
- Accept check or credit card [payments](#) on the spot via mobile or through the ServiceTitan portal, speeding up cash flow and reducing the need for follow-up calls.
- Integrate directly with accounting tools such as [Intacct](#) and [QuickBooks](#) ([see below](#)) so you don't have to change your current processes.

Can You Connect Business Reporting to Your HVAC Estimates?

Yes. ServiceTitan directly connects your estimates and pricebook to your reporting. The software lets you track the key components of your business, such as every job, technician and CSR, as well as every marketing campaign.

With our technician [scorecard](#), you can stay up-to-date on every tech's stats, such as: number of calls per day, estimates closed, revenue generated, maintenance agreements sold, and more. Likewise, our CSR scorecard lets you monitor metrics for your customer service team, such as number of calls handled, conversions, etc.

This means you can dig deep into your metrics to see what's driving revenue and where there's room for improvement.

Does your HVAC Estimating Software Integrate with QuickBooks?

Yes. ServiceTitan's HVAC Software integrates with Intuit QuickBooks Online and with QuickBooks Desktop Premier and Enterprise editions. General contractors who serve both commercial and residential customers can take advantage of the QuickBooks integration to simplify accounting procedures and smooth the flow of information from invoice on the construction project site to reconciliation in your accounting software, without the hassle of double entry.

ServiceTitan also integrates with Sage Intacct accounting software.