setting up a new CRM

FOR HVAC BUSINESSES

Import your client data : Export customer contacts, service history, and job notes from your old system (or spreadsheets) and import into your new software. Clean up duplicates and outdated info before you migrate, not after.

Build your service catalog : Set up your pricebook with the services, flat rates, or hourly rates you offer. This is what your quotes and invoices will pull from, so get pricing accurate before you start booking jobs.

Set up your team and permissions : Add techs and office staff, assign roles, and set permission levels for who can see pricing, edit invoices, or access client financials.

Configure scheduling & routing : Set business hours, service areas, and default job durations. Build out any recurring maintenance schedules now so they auto-populate going forward.

Connect payment processing: Link a payment processor so techs can collect on-site and customers can pay invoices online. Test a transaction before going live.

Set up automated messages: Turn on appointment reminders, on-my-way texts, and follow-up emails. Customize the templates so they sound like your business, not a generic default.

Run a pilot with one crew: Before rolling out company-wide, test the full workflow (booking to invoicing) with one tech or crew for a week or two to catch issues early.

Train the full team: Once the pilot works, train the rest of your team. Focus on the day-to-day actions they'll actually use: creating jobs, updating job status, taking payments.

Connect it to your website: Add a booking form on your site that feeds directly into your new software. If your current website doesn't support that kind of integration, it may be worth a redesign.