

Case Study: Unifying Sales and Operations : Salesforce Sales Cloud + BuildOps Integration for Commercial Contractors



At CloudStreet, we love helping businesses bridge the gap between their "front office" and "back of-fice." Based right here in Houston, Texas, we serve a diverse range of clients: from local mechanical contractors in the DFW and Houston areas to global enterprises looking to squeeze every bit of ROI out of their Salesforce orgs.

Recently, we had the pleasure of working with two heavy hitters in the Texas mechanical and HVAC space: **Applied Climate Solutions** and **K&R Mechanical Services**. Both companies faced a similar hurdle: their sales teams were operating in a vacuum, disconnected from the critical operational data living inside their ERP, BuildOps.

To solve this, we implemented Salesforce Sales Cloud and built a robust [Salesforce BuildOps integration](#) that brings the two worlds together.

Ready to integrate your workflows?

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2 Companies Leading the Way in Texas Mechanical Services

Before we dive into the technical "how-to," let's look at the two companies that are modernizing their tech stacks to better serve the Lone Star State.

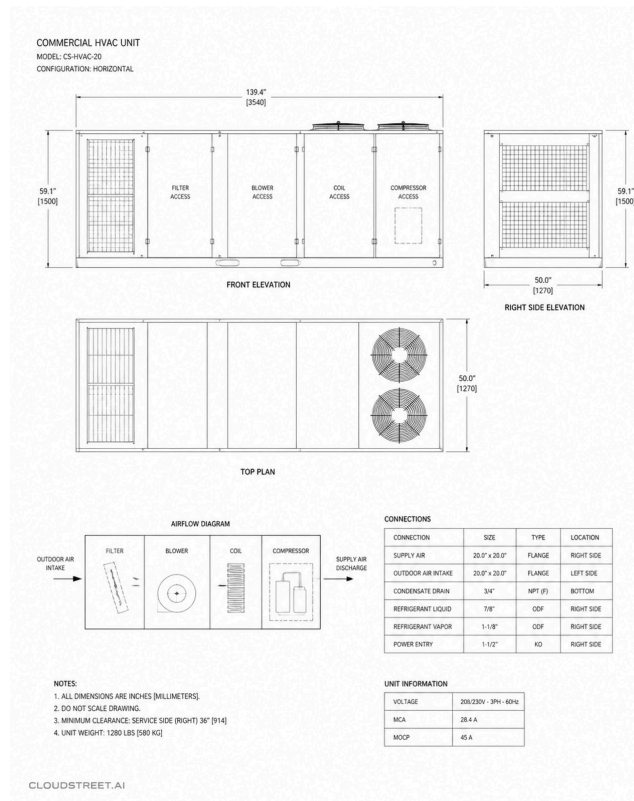
1. **Applied Climate Solutions (Lewisville, TX)**

Located in the DFW area, [Applied Climate Solutions](#) is a premier HVAC manufacturers' representative and building automation specialist. Since 2020, they've been the go-to for building owners and engi-

neers who need high-efficiency commercial equipment. With about 22 employees, they needed a way to track complex sales cycles without losing sight of the technical execution.

2. K&R Mechanical Services (Houston, TX)

Right in our own backyard, [K&R Mechanical Services](#) is a powerhouse commercial HVAC and plumbing contractor. They handle everything from sheet metal fabrication to refrigeration and preventive maintenance. For a full-service firm like K&R, the handoff between a signed contract and a dispatched technician is where the magic (or the mess) happens.



6 Key Features of the Salesforce and BuildOps Integration

The goal of these projects was simple: give sales reps a "single pane of glass." By integrating [Salesforce Sales Cloud](#) with [BuildOps](#), we enabled the following 6 core functionalities:

1. **Lead and Pipeline Management:** Reps handle all prospecting and deal-tracking in Salesforce, tailored specifically for the nuances of commercial contracting.
2. **Live Job Visibility:** Sales reps can see the status of ongoing jobs in BuildOps directly from the Salesforce Account or Opportunity record.
3. **Open Quote Tracking:** No more asking "did they see the quote?" Reps can see all outstanding quotes generated in BuildOps without leaving their CRM.
4. **Payment Status & AR Visibility:** Because sales reps are often the primary point of contact, they can now see if a customer is behind on payments, providing vital support for collections.
5. **Bi-directional Sync:** Customer data and contact information stay consistent across both platforms, ensuring the field techs and the sales reps are calling the same person.

6. **Integrated Reporting:** Leadership can now view a unified dashboard that shows the health of the sales pipeline alongside the reality of operational capacity.

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7 Expected Benefits for Salesforce for Commercial Contractors

It is important to note that both Applied Climate Solutions and K&R Mechanical are in the early stages of their implementation deployment. While the systems are live, we are currently tracking the "Early Wins." Based on our experience with [Salesforce for HVAC companies](#), here are the 7 expected benefits these teams are projected to realize:

1. **Drastic Reduction in "System Toggling":** We expect reps to save hours each week by not having to log into BuildOps just to check a project status or payment date.
2. **Improved Pipeline Accuracy:** With real-time data flow, the sales forecast will finally reflect the operational reality, reducing the "fluff" in the funnel.
3. **Faster Quote-to-Order Cycles:** By streamlining the handoff from Salesforce to BuildOps, jobs can move from "Won" to "Scheduled" significantly faster.
4. **Elimination of Data Entry Errors:** Manual "double-entry" is the enemy of data integrity. This integration ensures that a typo in a customer's address in one system doesn't break the workflow in the other.

5. **Proactive Collections Support:** Sales reps can address payment issues during regular check-ins, improving cash flow without requiring a "cold call" from the accounting department.
6. **Better Customer Experience:** When a customer calls their rep, the rep actually knows what's happening on-site. That level of professional service is a massive competitive advantage.
7. **Real-Time Leadership Insights:** Management can finally see the ROI of their sales efforts by comparing lead costs in Salesforce to job profitability in BuildOps.



Why Commercial Contractors Choose CloudStreet

Integrating two massive platforms like Salesforce and BuildOps isn't just about mapping fields; it's about understanding the workflow of a mechanical contractor. Whether you are a local shop in Houston or a national HVAC provider, the challenges are the same: you need your data to work as hard as your technicians do.

We specialize in ROI-focused Salesforce implementations. We don't just "turn it on": we make sure it actually makes your company more profitable.

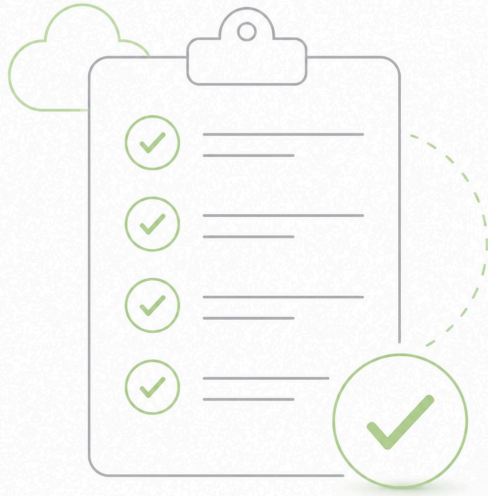
Still have questions about Salesforce BuildOps integration?

[Contact Our Team](#)

Conclusion: The Future of Mechanical Contracting is Integrated

For companies like Applied Climate Solutions and K&R Mechanical Services, the decision to invest in a Salesforce integration with BuildOps is about more than just software. It's about building a foundation for growth. By breaking down the walls between sales and operations, they are positioning themselves to be more agile, more informed, and more profitable.

If you're a commercial contractor in Texas or beyond and you're tired of your sales team working in the dark, let's talk. We can help you turn your CRM into a powerful engine that drives your ERP.



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