

Search for a part, find an in-stock replacement

In this SOP, we'll walk through how to search HVAC XREF with a part number, find stock status of that part, and also any suitable replacements that might be in stock to serve the customer. We will also show you how to compare products.

Sample Scenario: Roger works at the TEC store in Lansing, IL. A customer came in with a bad motor from a job today and he needs a replacement. The customer indicated that an OEM part will not be necessary for this job. The part number he has is HC42GR238. Let's use the HVAC XREF tool to help Roger see if he has anything in stock that can help this customer today.

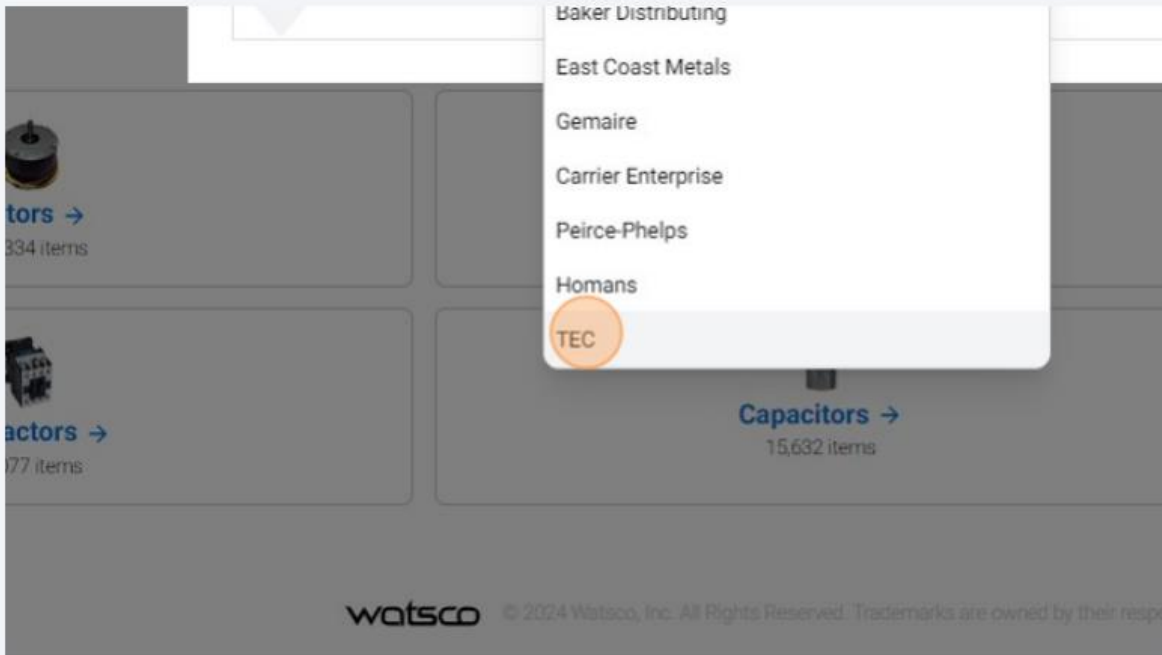
- 1 Navigate to <https://www.hvacxref.com/>
Don't forget, you need to be at a store or logged in to a Watsco VPN to have access to the software.

- 2 *On your first visit, you will need to let us know your business unit and branch information. You will not need to enter this information each time you use the tool. Click in this box or start typing the name of your business unit to access the drop-down menu.*

The screenshot displays the HVAC XREF tool interface. At the top, there are three numbered steps: 1. Select Business Unit, 2. Select Branch, and 3. Start. The first step is highlighted with a large blue circle containing the number 1. Below this, a text box labeled 'Business Unit' is shown with a dropdown menu open. The dropdown menu lists several options: All, Baker Distributing, East Coast Metals, Gemaire, and Carrier Enterprise. A large location pin icon is visible on the left side of the interface.

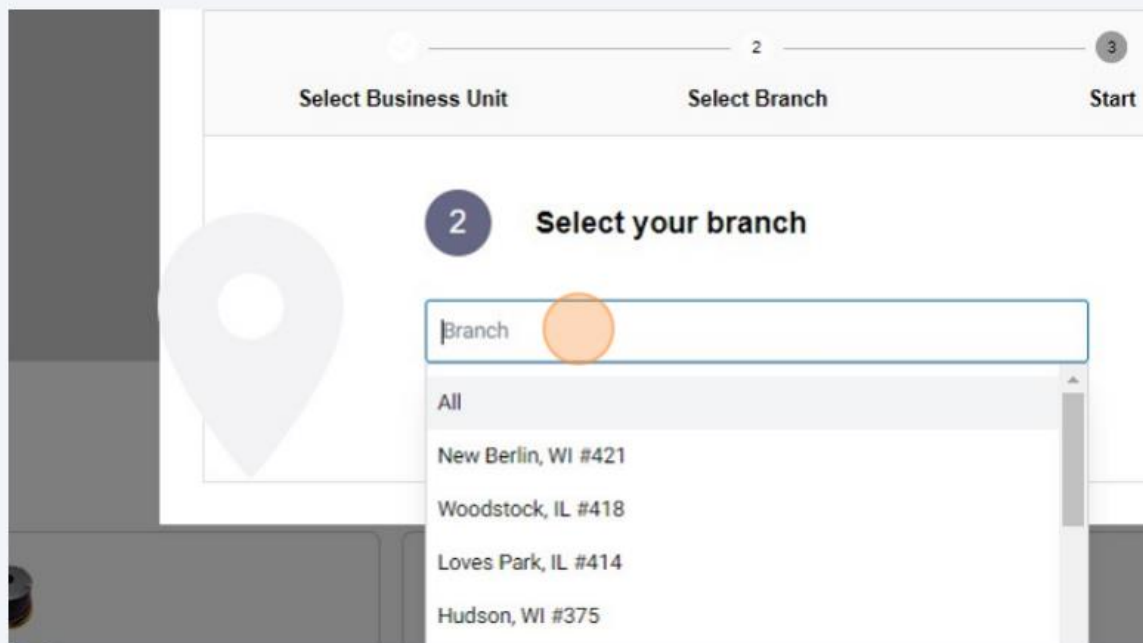
3

In this sample, we will select "TEC" - once you have made a selection, the screen will update automatically.



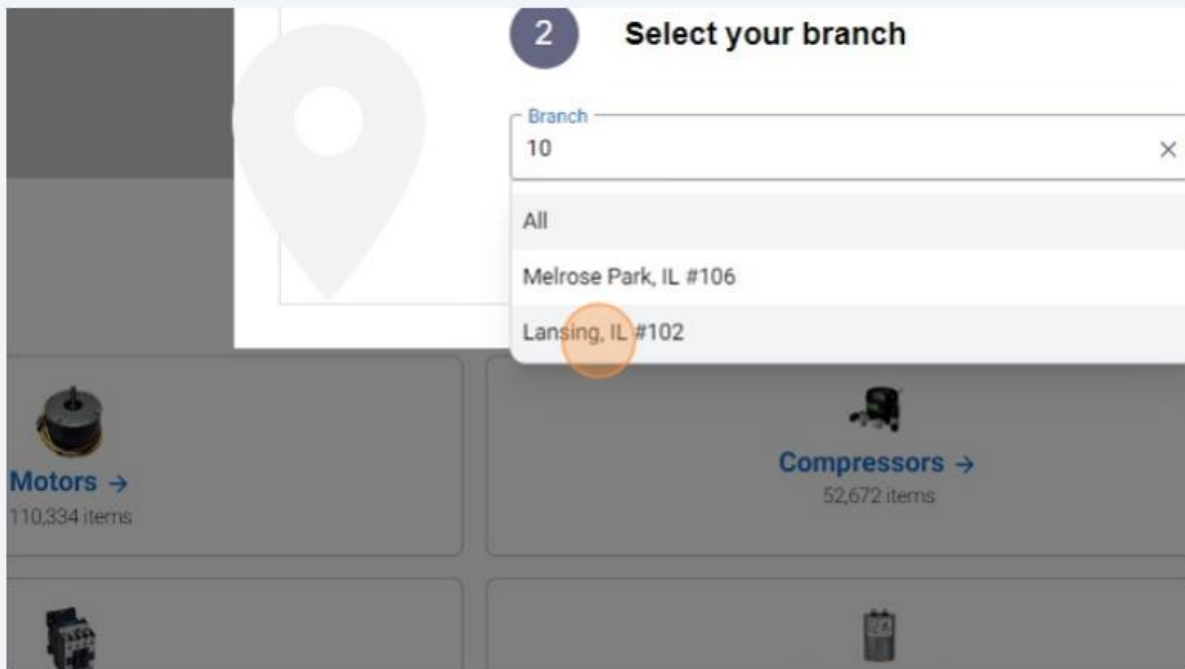
4

Click in this box and start typing the name of your location or branch number to filter through the drop-down options.



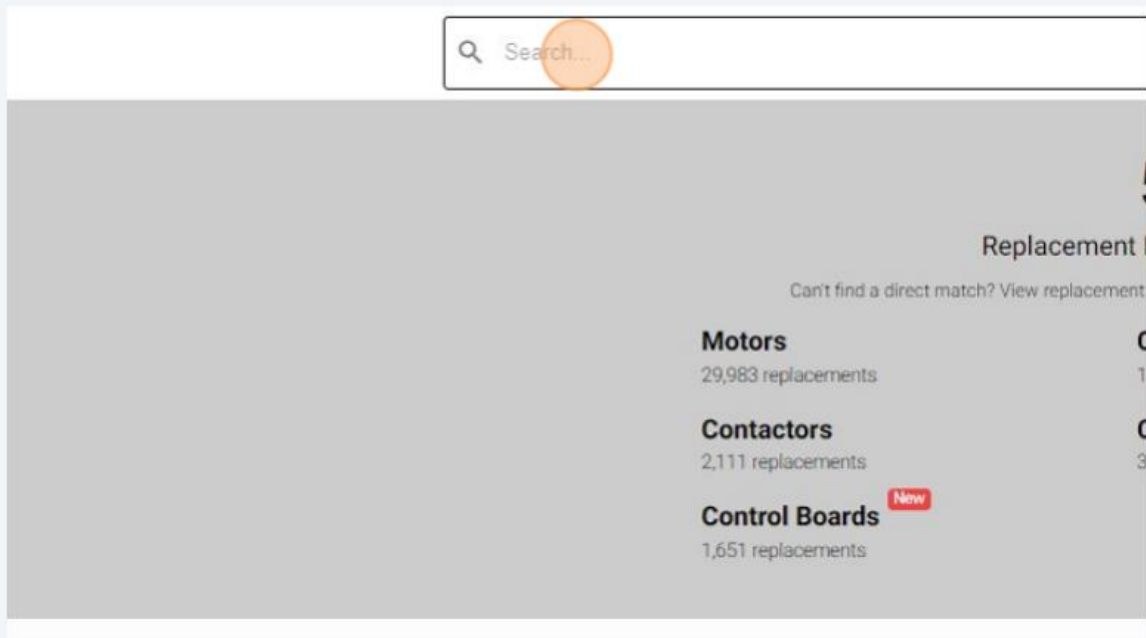
5

In this example, we are in the Lansing, IL, branch, so we will start typing 102 and select Lansing from the drop-down options. Once you have made a selection, the screen will update automatically.



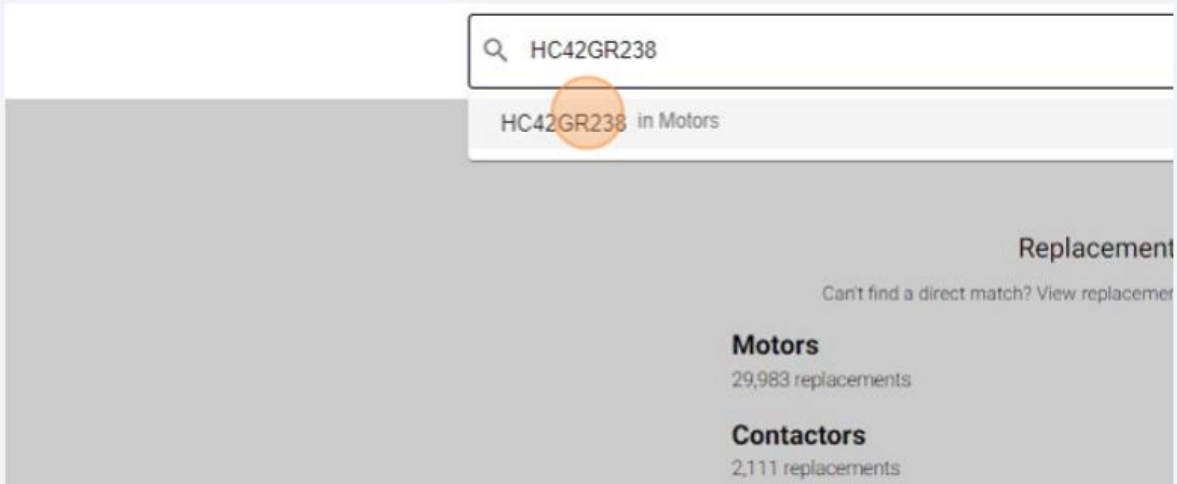
6

IF YOU HAVE A PART NUMBER AVAILABLE: Find the SEARCH box at the top of the screen and click in that field.



- 7 Paste or type the part number in the box. In this example, we are looking for PN: HC42GR238.

- 8 Press ENTER or select it from the drop-down options.



- 9 On the product details page, in the top right corner, you can see a general availability status. In this example, the product is in stock at another business unit (not in stock at any TEC branch). Click the eye icon to view more information.

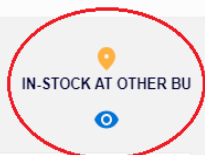
Lookup Product

[BACK TO PRODUCT RESULTS](#)

✓ HC42GR238 Found



HC42GR238
Non-Branded



Product Information:

Cycle/Hertz	50/60 Hz	Motor Type	ECM (Electronically Commutated Motor)	Number of Speeds	Variable
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FEEDBACK

10

A "drawer" will pop out from the side of the screen, and you can see that Carrier Enterprise and Peirce-Phelps have this product in stock. Click the arrow icon, and you can see how far away those locations are.

Close X


Availability



HC42GR238 - Non-Branded




Carrier Enterprise (34)

Show Availability 



Peirce-Phelps (1)


Show Availability 

11

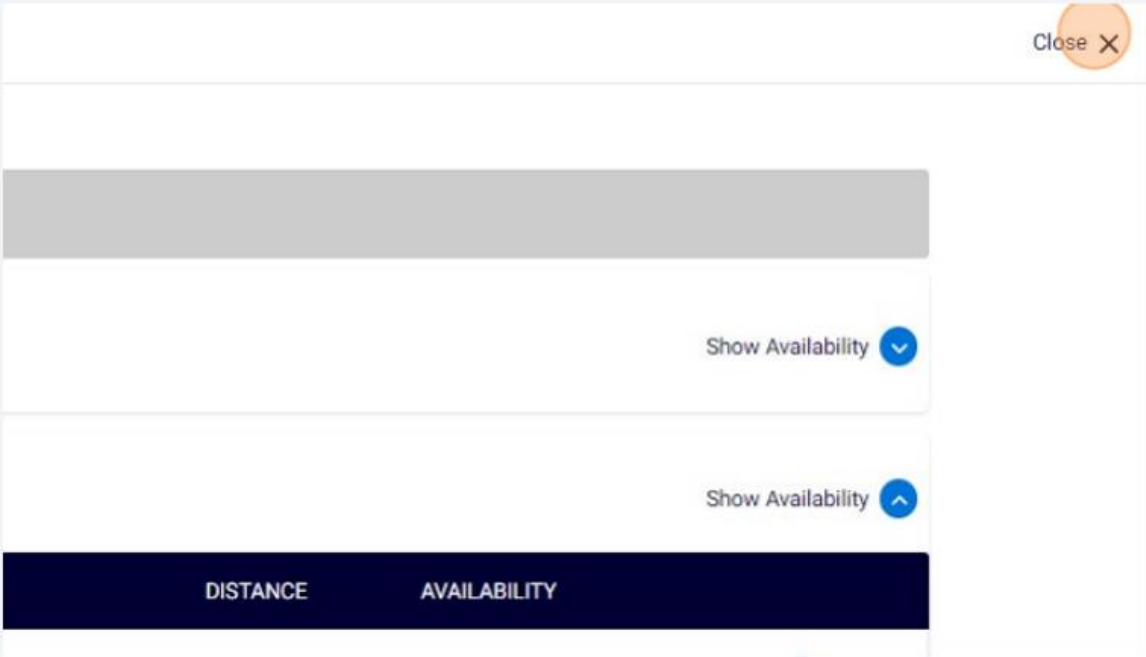
In our example, the closest (exact match) product is 462 miles away. Although you offer to initiate a transfer to get this part, your customer has indicated that he doesn't want to wait to receive that part, and an OEM part will not be necessary for this application.

Close X

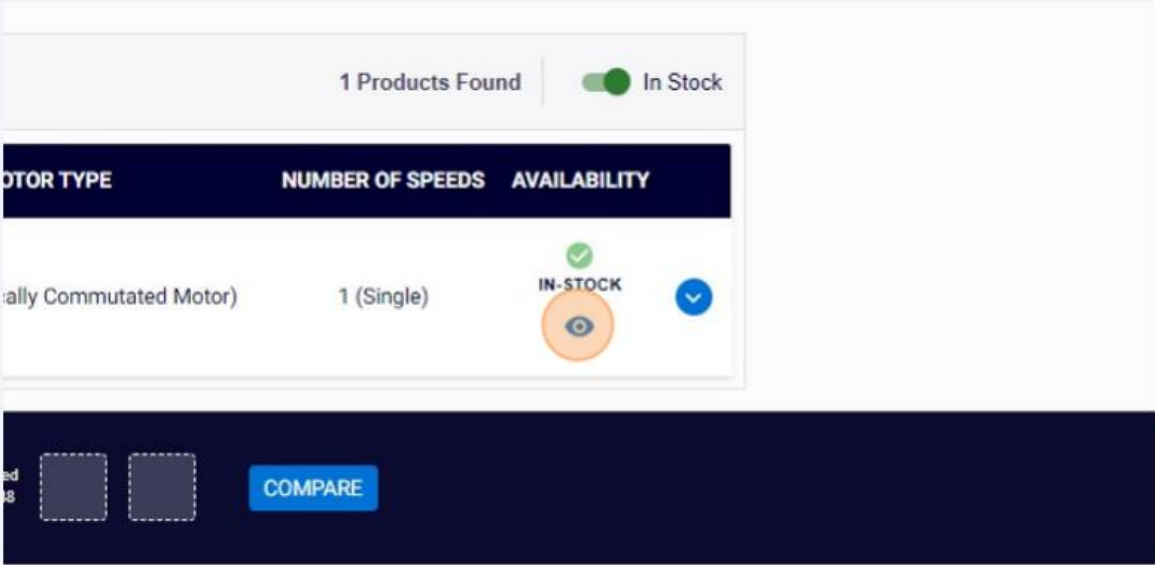
Show Availability 

PHONE	DISTANCE	AVAILABILITY	
901-388-4119	462.2 mi.	 IN-STOCK	
423-698-7755	472.7 mi.	 IN-STOCK	

12 To go back to the product page, click "Close" in the top right corner.



13 Scroll down and see if there are any possible replacement products. Good news! We do show one, and it's in stock in your branch. You can click the eye icon just to be sure if you would like.



ademarks are owned by their respective company.

- 14 From this view, you can also see other nearby TEC branches that have this replacement item in stock.

Close X

Show Availability

DISTANCE	AVAILABILITY
0	<div>✓ IN-STOCK</div> <div>✓ YOUR BRANCH</div>
28.2 mi.	<div>✓ IN-STOCK</div>

- 15 On the left side of the screen, you can click in the little box to compare this product to the original.




PRODUCT ID	BRAND	CYCLE/HERTZ	MOTOR
<div><div></div><div>1188555</div><div>SUBSTITUTE</div></div>	Fast Parts	50/60 Hz	1/3 HP

Compare Products

You can select up to 3



16 Click "COMPARE"

MOTOR HP	MOTOR TYPE	NUMBER OF SPEEDS	AVAILABILITY
1/3 HP	ECM (Electronically Commutated Motor)	1 (Single)	IN-STOCK

 Non-Branded HC42GR238
  Fast Parts 1188555
 
[COMPARE](#)
[CLEAR ALL](#)

17 On the compare screen, you can view all specs side-by-side. Any differences will be highlighted in blue. You will want to review those fields with your customer to ensure the replacement product will in fact work for his application. When finished, you can click BACK TO PRODUCT at the top.

[BACK TO PRODUCT](#)
☒ Highlight Differences

		
	Look Up	SUBSTITUTE
Availability	IN-STOCK AT OTHER BU	IN-STOCK
Part #	HC42GR238	1188555
Cycle/Hertz	50/60 Hz	50/60 Hz
Motor Type	ECM (Electronically Commutated Motor)	ECM (Electronically Commutated Motor)
Number of Speeds	Variable	1 (Single)

CONGRATULATIONS!

Although you didn't have the exact part in stock that this customer came in with, by using the HVAC XREF tool, you were able to help Roger find an in-stock, suitable, replacement for the customer. He walked away today with the Fast Parts replacement motor and a smile on his face.

The customer is happy that he didn't have to wait for a part to be shipped to him, and you saved him from potentially going to shop with one of our competitors. Additionally, his homeowner that ultimately needs this part can get their repair completed quicker.

Thank you for providing such an amazing customer experience!