

Customers > Bolaños HVAC

Bolaños HVAC reduced estimating time by 92% while growing profitability with real-time job costing.

Bolaños HVAC is a San Jose based HVAC contractor led by David Bolaños, a second-generation tradesman who specializes in residential retrofits, system upgrades, and light commercial work.

As the business grew, David needed a faster way to estimate, a clearer handle on job costs, and a system that helped him stay organized without sacrificing time with his family.



Challenge

Since launching Bolaños HVAC in 2024, David was managing the business with a collection of disconnected software tools. He built construction estimates in spreadsheets, generated invoices in a separate app, and processed payments through yet a third system.

Putting together a bid for a general contractor or homeowner meant hours on a laptop at night. Even with over 10 years of experience, remembering every component under time

pressure was difficult—and missing scope items often meant tighter margins later. When multiple bids stacked up, the workload compounded.

For each bid, I'd spend at least a few hours on the laptop putting everything together... If I had like four estimates to do, it would take me the whole night.

Budgeting and job costing were equally challenging. Without a system to categorize field purchases in real time, costs from material runs, fuel, and miscellaneous expenses all blurred together in monthly credit card statements. This made it harder to price accurately, forecast profitability, and stay organized while the company continued to scale.

Solution

When David began using Beam, the AI Estimator immediately reshaped his workflow. Although initially skeptical of using new software, he found Beam easy to navigate and far faster than his old process. Previously, David spent nearly three hours switching between notes and reference documents, then building and formatting the bid on spreadsheets. With Beam, those steps collapsed into a single flow: the AI pulled takeoffs, structured the estimate for him, and surfaced scope items he might have overlooked:

I go on the draft and start typing 'multi-positional air handler installation with a heat pump, 2,500 square foot home, all new ducting,' and then it adds all the extra things I didn't include like drainage, refrigeration lines, thermostats... so it fills in all the gaps.

Beam also became the financial backbone of how he manages and tracks **job costs**. David assigned **Beam Cards** to his field leads with customized spending limits. Whenever materials or fuel are purchased, he receives an instant notification and the spender is prompted to categorize the transaction to the correct job. With this clarity, he can make stronger pricing decisions, anticipate margins earlier, and tighten operations as the business grows.

Results

Bid time reduced from 3 hours to 15 minutes (92% faster)

With Beam's **AI Estimator**, Bolaños HVAC can send out polished, detailed quotes in minutes while keeping them free for clients. This speed allows David to take on more opportunities without sacrificing bid accuracy—or evenings with his family.

Real-time job costing

The Beam Card gives David a live view of material, fuel, and field spending as it happens; replacing guesswork with reliable, job-level insight. He can now understand a project's financial health in real time, helping him feel more confident about margins and the overall performance of his business.

Replaced 3+ separate tools with a single connected system

Beam consolidated estimating, spending, and job costing into one platform, eliminating the need to toggle between spreadsheets, invoicing tools, payment processors, and credit card statements. The result is a cleaner, faster, and more organized way to run the entire business.

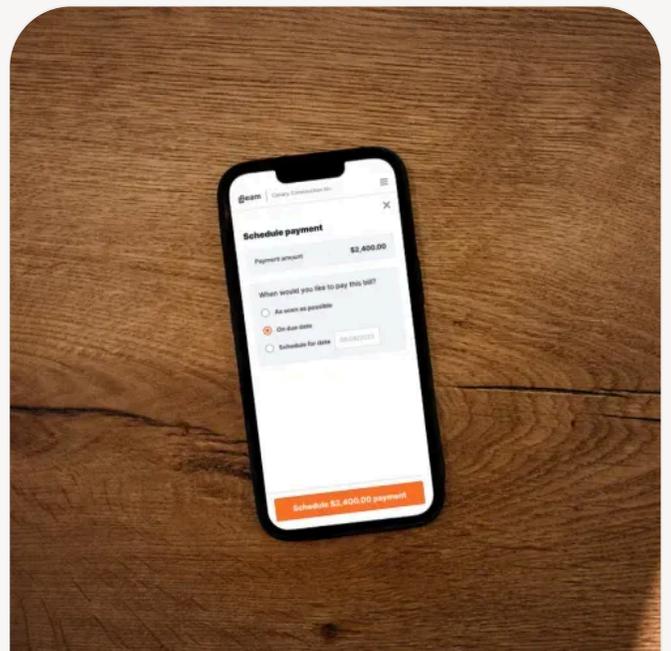
Beam has helped me stay more organized. It's helped me be more profitable. And it's just helped me overall manage my business in a better direction.

Time is money. Save both.

Join hundreds of contractors that trust Beam to estimate, manage projects, and stay on budget.

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¹ 2.5% Annual percentage yield (APY) effective 10/10/2023. This is a variable rate and may change after the account is opened.

² The Beam Card is a pay in full charge card. Any outstanding statement balance will be automatically debited on each monthly payment due date from your designated bank account or the Beam Balance.

³ Beam partners with CapitalOS and First Internet Bank of Indiana, Member FDIC, for Beam Card. Cards are issued by First Internet Bank of Indiana, pursuant to a license from Visa Inc. Depending on your location, credit is provided by CapitalOS, Inc. or CapitalOS Financial Services LLC.

⁴ Beam Balance accounts are eligible for pass-through FDIC insurance up to \$250,000 per depositor through Fifth Third Bank N.A., Member FDIC. Beam Balance Accounts are eligible for FDIC pass-through deposit insurance if they meet certain requirements. The accounts are eligible only to the extent pass-through insurance is permitted by the rules and regulations of the FDIC, and if the requirements for pass-through insurance are satisfied. The FDIC insurance applies up to \$250,000 per depositor, per financial institution, for deposits held in the same type of account (business versus personal, and so on). Neither Stripe nor Beam are an FDIC insured institution and the FDIC's deposit insurance coverage only protects against the failure of an FDIC insured depository institution.