

# Welcome Everyone

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HVACBizPro Training  
Proposals Module



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Digital Tools to Help Grow your HVAC Biz

- Proposal Tab
- Navigating the Tab
- Creating and Copying a Template
- Different Ways to Create a Proposal



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Proposals

1. All 2. All proposals 3. 4. 25 5. Creation Date 6. Descending Order 7. GO

7.	8.	9.	10.
Status	Type	Title	Rep
<input type="checkbox"/>	Customer	<a href="#">3.0 Ton Furnace with Air 8-10</a>	DeWayne Gibson
<input type="checkbox"/>	Customer	<a href="#">2.5 Ton A/C Only 7/17</a>	Shannon Eardley
<input type="checkbox"/>	Customer	<a href="#">2.5 Ton A/C Only 7/17</a>	Shannon Eardley

1. Choosing this will show Won, Open, Lost, or Inactive.
2. This filter will allow you to see All, Templates, or Customer Proposals.
3. Enter a word and it will sort the database of ALL proposals. Customer and Template.
4. You can expand the number of templates beyond 25.
5. You can search by updated or open date.
6. This column puts the order in a "date" fashion.
7. Once you have your search criteria entered you can click "GO" The Status of the proposals are listed as Yellow is Open, Green is Won, Lost is Red and Inactive is Blue.
8. Anytime you place your cursor over the titles of the columns you can sort the column.

**TIP:** You can adjust mass templates here. Open them up by searching with your criteria. Then hold down your control button and open each template to open them up in their own browser tab.



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The screenshot shows the HVACBizPro.com dashboard. The 'Proposals' menu item is circled in blue. Below the navigation bar, five circular buttons are visible: 'Build From AHRI', 'Choose an Existing Templates', 'Load Analyzer', 'Start with a Blank Template' (circled in blue), and 'Walk Me Through It'.

Choose the proposal link at the top of the page  
Choose "Start with a Blank Template"

Type **1.**

Title **2.**

Hide Prices **3.**  Yes

Labor Cost Per Unit (\$) **4.**

Quality Headers <b>5.</b>	Premium	Better	Good	Budget
Number of Units <b>6.</b>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Unit 1 (O.D. Unit) <b>7.</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Unit 2 (Coil / AHU) <b>8.</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Unit 3 (Furnace/Aux htr) <b>9.</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Unit 4 <b>10.</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



1. Change the drop down to a "Template"
2. Title the template. Size, Application, Person who created it, Date.
3. It isn't necessary to "Hide Prices" at this level, but you will be able to do that when you create the template for a customer.
4. This number is being pulled from the "Company Defaults" area. Labor cost per unit.
5. Quality Headers are being pulled from the "Quality Levels" in the "More" section of the Admin and Edits. Generally, a dealer would set these and never change them. However they can be changed even at the proposal level.
6. The number of units can be changed to reflect the number of systems that you are wanting to show on this proposal.
7. The first unit, must be the Outdoor unit. Just start typing the model and it will selectively minimize the model to what you are searching.
8. The second unit must be an evaporator coil, and/or an air handler. Putting a furnace here will not allow for AHRI to show in the dropdown.
9. The third unit must be the furnace. If you are installing a heat pump, you can list the auxiliary heater in the blank.
10. Use the fourth unit as a thermostat or accessory for the system.

**Tip:** Always start with the lowest size. Go through the template and choose every option that you wish to always show. Including Parts, CRD's, Included Services, and Upgrades.



# Creating a Template - Parts

1.	Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	Special Parts	<a href="#">Add special part</a>			
	Total Special Mats	\$0	\$0	\$0	\$0
3.	Common Parts	<a href="#">Add common part</a>			
	Total Common Mats	\$0	\$0	\$0	\$0
	Subtotal for units and parts	\$0	\$0	\$0	\$0

1. Enter any notes here you want the customer to see about this option
2. Add any Special Parts to the option of the proposal. Special Parts appear on the proposal under "Special Inclusions"
3. Add any Common Parts to the option of the proposal. Common Parts do not appear on the proposal, but they do appear in the cost of goods sold.

SERVICE DETAILS		Included Services	Price	Margin	Quality Levels				
1.	<input type="checkbox"/>	Details INSTALL AC SYSTEM	\$ 500.00	3. No	All <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
2.	<input type="checkbox"/>	INSTALL HP SYSTEM	\$ 600.00	4. No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. This is the Included Services carried over from the Defaults.
2. Choose these and activate them for the proposal
3. You can assign their cost to each option over to the right.



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## 8 Create a Template – Financial Area

1.	Labor	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
2.	<input checked="" type="checkbox"/> Tax %	<input type="text" value="8.60"/>	<input type="text" value="8.60"/>	<input type="text" value="8.60"/>	<input type="text" value="8.60"/>
	COGS	\$240.00	\$240.00	\$240.00	\$240.00
	<input checked="" type="checkbox"/> GM %	<input type="text" value="39"/>	<input type="text" value="42"/>	<input type="text" value="44"/>	<input type="text" value="45"/>
	Gross Profit from Margin	\$153.44	\$173.79	\$188.57	\$196.36
	Price Before Gross Profit Dollars	\$393.44	\$413.79	\$428.57	\$436.36
	<input checked="" type="checkbox"/> GP \$	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	GP \$ Unit	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	GP \$ Total	\$0.00	\$0.00	\$0.00	\$0.00
	Price Before Commission	\$393.44	\$413.79	\$428.57	\$436.36
	<input checked="" type="checkbox"/> Commission %	<input type="text" value="10"/>	<input type="text" value="8"/>	<input type="text" value="6"/>	<input type="text" value="2"/>
	Commission Total	\$43.72	\$35.98	\$27.36	\$8.91
	Price before financing	\$437.16	\$449.77	\$455.93	\$445.27
	<input checked="" type="checkbox"/> Buydown Rate %	<input type="text" value="18"/>	<input type="text" value="8"/>	<input type="text" value="5"/>	<input type="text" value="5"/>
	Buydown Cost	\$95.96	\$39.11	\$24.00	\$23.44
	Selling Price before CRDs and Upgrades	\$533.12	\$488.88	\$479.93	\$468.71

1. Enter the labor unit you wish to assign to this proposal. Notice this assignment is "1", and our labor per unit is \$240. Then notice our labor is listed as \$240.
2. When you check the boxes off to the left notice the template grays out the fields on the template. This means that the template is obeying the "Company Defaults" area.
3. If we were to uncheck the box as listed by the circled "Buydown Rate %" it would allow us to change this particular template.

**TIP:** The GP\$ function is not being used on this proposal as you see the GP\$'s equal zero. If we had selected the GP\$ to equal our labor units in the company default, this would equal "1". The value of our labor units.



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CREDITS  
REBATES  
DISCOUNTS

Credits/ Rebates/ Discounts Quality Levels

Active	Details	Method	Cap	Apply to Selling Price	% or \$	All	1	2	3	4
<input type="checkbox"/>	Service Discount	%	300.00	No	5.00	<input type="checkbox"/>				

1. All of these CRD's are coming from the "Company Defaults". You can choose to activate them to the template and assign them to the quality level they are associated with.

UPGRADES

Quality Levels

Active	Approved	Details	Price	Photo	Video	All	1	2	3	4
<input type="checkbox"/>	<input type="checkbox"/>	<b>Infinity Air Purifier</b> Traps and Kills Air Pollutants: Purifies, Doesn't merely Filter The award-winning	1250.00		<iframe width="420" height="315" src="http://www.youtube.com/embed/ed5FlshUTyA" frameborder="0">	<input type="checkbox"/>				

1. The upgrades area works much like the CRD area. Except there is one more option.
2. You can add the option to the template by choosing the "Approved" option. This will put it into the proposal as an option or an upgrade. Again, assigning them to each option is off to the right under quality levels.

Once you have completed this page, please click Save at the bottom of the page.

**TIP: Do not offer too many upgrades and/or options to the customer. The customer will experience what is called paralysis by analysis. Too many options, means confusion to say "YES".**



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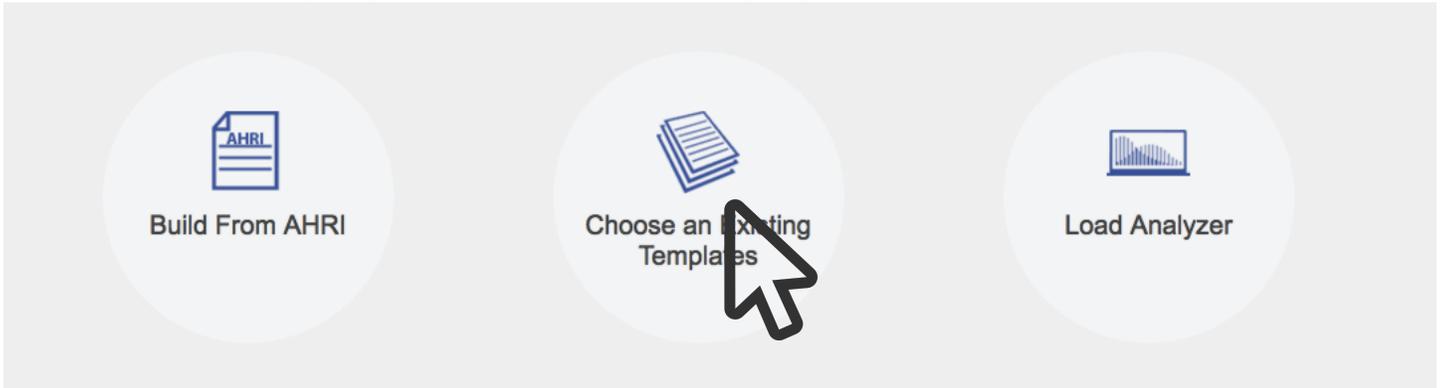


# Create a Proposal

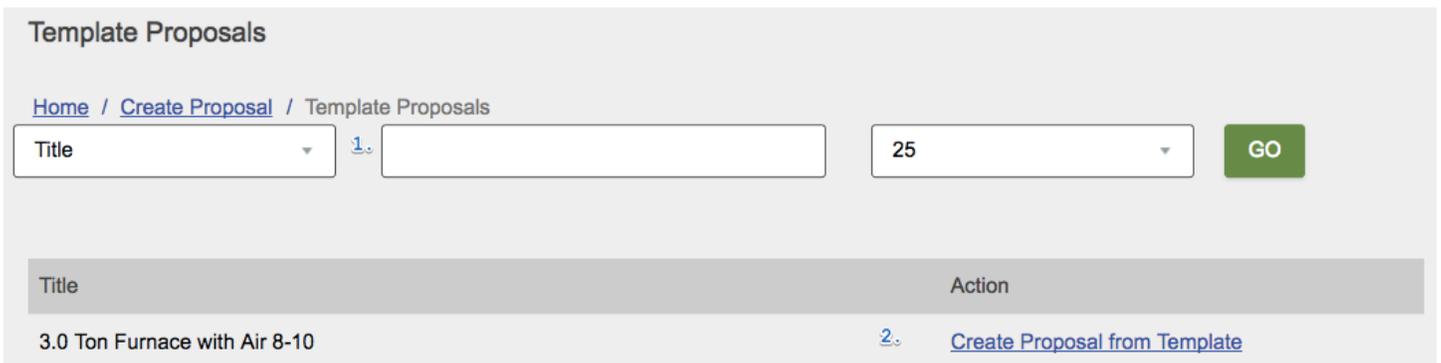


- Dashboard
- Customers
- Proposals
- Service Tickets
- Dispatch
- Reports
- Load Analyzer
- Parts
- More

First choose the proposal link, and create proposal



As a sales-rep or technician you will have three options. For this example we are going to choose “Choose and Existing Template”



When you click “Choose and existing template” you will see all of the templates created by the admin.

1. You can search for the template you want to see by entering it here. Once you find the one you want...
2. You can choose “Create Proposal from Template”



Status

Title <sup>1.</sup>

Hide Prices  Yes

Customer <sup>2.</sup>

Install Address <sup>3.</sup>

<sup>4.</sup>

Please Save Before editing anything below this

1. Change the title from the title listed as the template.
2. Start typing the customer's address and you should see the customer pull up. If they do not, you will need to add them to the database before you proceed any further.
3. If there is a different address for the home than the customer's address, enter it here. Otherwise, leave this blank.
4. Once you have completed these, then click "Save" before moving any further. Assuming there aren't any changes that are required you can print the proposal for the customer and be complete with the modification of the proposal.

<sup>1.</sup> Hide Prices  Yes

<sup>2.</sup> Hide Unit Descriptions  Yes

<sup>3.</sup> Hide Unit Warranty Info  Yes

<sup>4.</sup> Hard Copy [HVACproposals.com-640947-customer-30-Ton-HP-Gibson-Microf-August-15-2017-11-12-06.html](https://HVACproposals.com-640947-customer-30-Ton-HP-Gibson-Microf-August-15-2017-11-12-06.html)  
[View Past Hard Copy Proposals](#)

1. 1, 2, 3 - You can Hide Prices, Descriptions and the Unit Warranty from the proposal here.
4. Each you click save it keeps a hard copy. You can always copy from here.



Status	Open
Date Opened	08-15-2017
Customer	<input type="checkbox"/> Donnell Gibson
Sales Rep	<input checked="" type="checkbox"/> DeWayne Gibson
No Follow up Email	<input type="checkbox"/>
Email Subject	ESS1 proposal for Donnell Gibson
Email Contents	<div><p>This is the initial email. You can modify this email to your company's liking. You will want to click the link at the bottom to view the proposal.</p><p>Please see the requested proposal at: <a href="http://hvacbizpro.com/p/okf3zYvo">http://hvacbizpro.com/p/okf3zYvo</a></p></div>

When you want to email the proposal you are can send it to the customer and yourself. The customer will receive the proposal the first day you send it, the third day, the second week, and the fourth week. We will only stop sending the proposal if:

1. You choose the option to not follow up with emails. That option is on the email window.
2. The proposal is changed from Open to Won, Lost or Inactive.

The content of the first email can be changed by free-texting in the box below the HTML editor. You can add links, pictures etc., Event the Subject line can be changed. When you email this link to the customer, they will receive it with your message and a link. There are some cases where the customer cannot view the link. This is because they have their email set up for Richtext and not HTML. You see this many times with people using AOL or Outlook. Simply ask them to copy the URL link into a browser and they will be able to view it.

Once they receive the email, they can choose the system they wish via digital signature.



From this point in the proposal, we recommend you work on practice proposals to see how adding labor, services, parts and CRD's affect the proposal.

Upgrades are not a part of the price unless you "approve" them to be included. Even then the stated price is the selling price.

General issues to consider:

1. We get requests occasionally on the programs speed. Some times there are program issues, but some times the issues are local to the users device. Please follow these steps to make sure the program's speed is optimum on your device.
  - a. When you move from one wifi connection to another, close down your wifi and reopen it with the new connection.
  - b. Clear out the cache on your computer very regularly. When we update the files in our program, your browser is storing our files to optimize time. If we re-write the file, your browser can become confused about what it is seeing. Sometimes new features won't even appear on your device.
  - c. Check your wifi connection speed. You can run this by going to "Speed Test" in Google.
  - d. Make sure you have the latest update on your browser. Google and Firefox are continually updating their software. It is imperative you have the latest version.
  - e. Make sure you have the latest Operating System for your device. An outdated operating system can be the difference between seeing a feature and not.
  - f. Finally, NEVER EVER USE INTERNET EXPLORER FOR OUR PROGRAM.



Did the course meet your expectations?

Did not Meet

Met

Exceeded




The course followed a logical clear order and that was applicable to HVAC?

Did not

Yes

Exceeded




I learned from the trainer and my fellow students?

Did not

Yes

Exceeded




Comments/Feedback/Ideas... That might have made my learning experience better...

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Participant\_\_\_\_\_ Trainer\_\_\_\_\_



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