

Welcome Everyone

Christine Malone
DeWayne Gibson

HVACBizPro Training
Service Module



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- Service Tab
- The Numbers
- The Process
- Completing the Ticket



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Service Tickets

Status	Type	Title	Sales Rep	Customer	Date Opened	Date Closed	Sales	Edit/Open
<input type="checkbox"/>	Customer	No A/C 0811	Shannon Eardley	Shannon Eardley	08/11/2017	00/00/0000	0.00	/
<input type="checkbox"/>	Customer	Gibson Home Downstairs	Christine Malone	Donnell Gibson	08/10/2017	08/10/2017	2339.00	/

Choosing the service header and you will see two dropdowns. Service Tickets and Add Service Tickets. When creating a NEW service ticket you will start here...

Title 1.

Status 2.

Customer 3.

Technician 4.

Date (MM-DD-YYYY) Opened Closed

After Hours Rate 5.

1. Title the ticket. Use something that references the system.
2. The status will change as the customer makes decisions.
3. Enter the customer by address or name
4. The sales rep will be entered if access is from the sales side.
5. Enter here if there is a different rate that will be applied to the price of the parts, actions or services that will be replaced or performed.



Here is the formula we use to price parts.

Cost of Part = \$10

Admin sets the markup for that part

Hourly rate = \$125

Let's use the case that the admin chose to mark up parts that are \$0 to \$25 at a cost of 600% markup.

This means a \$10 part will be \$60 ($10 \times 600\% = \$60$)

The admin has said they need an hour to change this part.

So there is a rate of 1 hour \times \$125 = \$125

So the selling price of this part is \$185

There is a secondary allowance for a part that is installed with another part and you don't require a full hour.

In this case let's say that is the Capacitor being installed with a motor.

So we have .1 hours to install that same \$10 capacitor.

$(.1 \times 125 = \$12.50) + (\$10 \times 600\%) = \$72.50$

Our program allows the company/tech or sales rep to add parts as required. When ESS categories are used, the image and description of the parts pull over and are not required to be entered by the person entering the part.



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Service Values +

1. Complaint or Issue No AC C

2. Diagnosis Found Faulty Capacitor C

3. Recommendations Replace Capacitor C

4. Resolutions Replaced Capacitor C

PARTS DETAILS -

5. Primary Parts + Add primary part

Parts Name/Number	Price	Warranty	Remove
Capacitor	\$185.00	7. <input type="checkbox"/>	8.

Total Special Mats \$185.00

6. Secondary Parts + Add secondary part

Total Special Mats \$0

Parts Subtotal \$185.00

1. Service Tech enters complaint or issue. Be very concise.
2. Service Tech enters diagnosis or issue. Be very concise.
3. Service Tech enters recommendations. Be descriptive.
4. Enter the resolution
5. Choose the part needed. You can use primary key words
6. If there are secondary parts, enter them here.
7. Click the warranty box to remove the cost of the part from the cost of the repair.
8. Click the trash can to remove any unwanted parts.



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REFRIGERANT ⊖ ✕

R22 lbs

R410A lbs

Here you can enter a value of refrigerant that is required for the job. Please enter these in pounds.

CREDITS
REBATES
DISCOUNTS ⊕

UPGRADES ⊕

Approved Today's Parts for a proper Repair	\$185.00
If you were on a maintenance discount plan, you would save 15%	(\$27.75)
	\$185.00
Diagnostic Fee (\$)	\$89
Credits/Rebates/Discounts	(\$0)
Upgrades	\$0
Tax	\$0
Amount	\$274.00

Just as in the proposal side you can enter credits, rebates, and/or discounts. As well as an upgrades you wish to show the customer.

Notes

1. I have the authority to order the above described work. It is agreed that the seller will retain title to any equipment or material furnished until full and complete payment is made, and if settlement is not made as agreed, the seller shall have the right to remove same and the seller shall be held harmless for damages resulting from the removal thereof. If this invoice is not paid within 30 days, I agree to pay 1.12 percent per month (18 Percent Annual Rate) or the minimum allowed in the state of residence on the unpaid balance. If this invoice is placed for collection, I agree to pay seller's attorney's fees and any court costs associated with this transaction.

2. Diagnostic Fee (\$)

3. [Save](#) [Print Ticket](#) [Email Ticket](#)

1. This is the company provided terms and conditions.
2. The Diagnostic fee is adjustable at this point.
3. Here you can Save, Print, and/or Email the ticket. At which the customer can choose to make the repair or get the price for a new system.



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1637 Race Track Rd
St Johns, FL 32259
Tel : 904-260-2622

Service Discovery

#638799
Date Created : 08/10/2017
Technician : Christine Malone

Donnell Gibson

7641 Lady Street
N. Charleston, SC 29420
dewayne@entsellingsolutions.com
Tel : (904) 759 4710

Customer Complaint or Issue

No AC

Diagnosis

Found faulty Capacitor

Recommendations

Replace Capacitor

PRIMARY REPAIR



Capacitor:

A capacitor is a device that assists the motor in your system to run as well as to start. In essence a capacitor fools the motor into thinking it has a third leg of power. All capacitors have microfarad ratings. These ratings over time can become weak and if not replaced in a timely manner can cause motors to fail. We call the capacitor a "good news" repair. If the motor is not running and the capacitor has completely failed, the good news replacing it may fix the issue.

Price

\$185.00

Discount*

(\$27.75)

***If you were a maintenance customer, you would qualify for these discounts.**

Total amount of invoice if all options above are selected, including discounts and the applicable diagnostic fee.

\$274.00

Terms & Conditions

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Ticket Approval Section

Print your name

Draw your signature

Draw It Clear

I accept the terms of this agreement.



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1637 Race Track Rd
St Johns, FL 32259
Tel : 904-260-2622

Service Invoice

#638799
Date Created : 08/10/2017 Date Completed : 08/10/2017
 Technician : Christine Malone
 Donnell Gibson
 7641 Lady Street
 N. Charleston, SC 29420
 dewayne@entsellingsolutions.com
 Tel : (904) 759 4710

Customer Complaint or Issue

No AC

Diagnosis

Found faulty Capacitor

Recommendations

Replace Capacitor

Resolution

Summary of APPROVED PARTS

Primary Repair



Capacitor:

A capacitor is a device that assists the motor in your system to run as well as to start. In essence a capacitor fools the motor into thinking it has a third leg of power. All capacitors have microfarad ratings. These ratings over time can become weak and if not replaced in a timely manner can cause motors to fail. We call the capacitor a "good news" repair. If the motor is not running and the capacitor has completely failed, the good news replacing it may fix the issue.

\$185.00

(\$27.75)

\$185.00

Approved Today's Parts for a proper Repair **\$185.00**

Diagnostic Fee **\$89.00**

Amount **\$274.00**

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Ticket Approval Section

Questions???



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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...

Participant_____ Trainer_____



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