

# Welcome Everyone

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DeWayne Gibson

HVACBizPro Training  
Defaults Module



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- Introduction
- Expectations/Questions/Feedback
- Jay Owen
- Break
- The Pricing Model
- Go Through the Defaults
  1. Company Defaults
  2. AHRI Search Defaults
  3. Load Analyzer Defaults
  4. Service Ticket Defaults
  5. Appointment Defaults
- Kitchen Table Selling
  1. Using the Scheduler
  2. Styles
  3. Process
  4. Questioning Techniques
  5. Closing the Sale

**Lunch**



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- Introduction
- Your Expectations of Today

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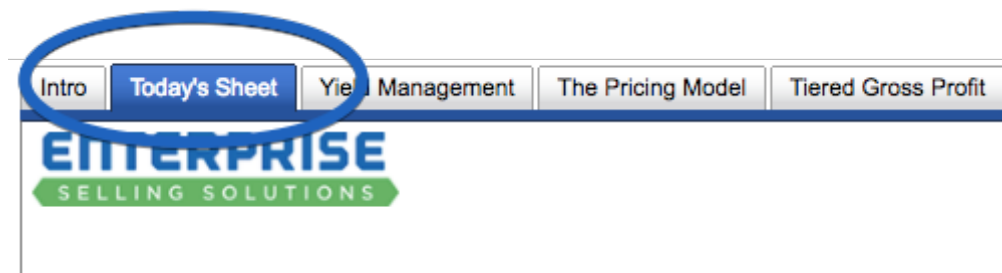


# The Pricing Model

Best			Budget		
Units	7500		Units	2000	
Parts	500		Parts	500	
U + P	8000		U + P	2500	
Tax	640	8%	Tax	200	8%
U + P + T	8640		U + P + T	2700	
Labor	240	240 1	Labor	240	240 1
U + P + T + L	8880		U + P + T + L	2940	
Included Svcs	400		Included Svcs	400	
U + P + T + L + IS	9280	COGS	U + P + T + L + IS	3340	COGS
Gross Margin \$'s and %'s	4997	35%	Gross Margin \$'s and %'s	2733	45%
Selling Price B4 Comm	14277		Selling Price B4 Comm	6073	
	15863	10%		6747	10%
Selling Price with B/D rate	17626	10%	Selling Price with B/D rate	7497	10%
Gross Profit Difference					
2264					

To get to this model go to this link

<http://hvacbizpro.com/new/company/help.php>



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# Company Defaults

All Defaults are under the ADMIN and the Admin's name

You're now using the NEW VERSION of HVACbizPro.com — you can still access the old version here [Click Here](#)

Help Welcome DeWayne Gibson

1

My Profile

Help

Logout

My Profile

Home / My Profile

2

Company Defaults ?

AHRI Search Defaults ?

Load Analyzer Defaults ?

Service Ticket Defaults ?

Appointment Defaults ?

Personal Details

First Name DeWayne

Any changes to the defaults area is a change only to NEW proposals. Existing proposals do not receive the change.

Lets go into the first one. Company Defaults. If you don't have access to the Admin, then use **kingdemo/kingdemo** to follow along.



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Monetize

# Company Defaults

## Company Settings

<b>1.</b> Use Universal Unit Database Info <input checked="" type="checkbox"/> Yes?	<b>2.</b> Show Gross Margin for Sales Rep <input checked="" type="checkbox"/> Yes?	<b>3.</b> Show Commission for Sales Rep <input checked="" type="checkbox"/> Yes?	<b>4.</b> Show Buydown Rate for Sales Rep <input checked="" type="checkbox"/> Yes?	<b>5.</b> Show Proposal Amount for Sales Rep <input checked="" type="checkbox"/> Yes?	<b>6.</b> Send Survey when Complete <input checked="" type="checkbox"/> Yes?
<b>7.</b> Allow GP\$ Units to equal Labor Units <input type="checkbox"/> Yes?	<b>8.</b> Hide Warranty Info from Units on Printed Proposals <input type="checkbox"/> Yes?	<b>9.</b> Allow Sales Reps to Delete Proposals? <input type="checkbox"/> Yes?	<b>10.</b> Hide Description Info from Units on Printed Proposals <input type="checkbox"/> Yes?	<b>11.</b> On Print Proposals, show Available upgrades and Options before Terms and Conditions of Agreement <input checked="" type="checkbox"/> Yes?	

1. Connects the Units to Lexicon
2. Allow the Sales Rep to see Margin
3. Allow the S/R to see Commission
4. Allow the S/R to see the Buydown Rate.  
(What is the Buydown Rate)
5. Allow the S/R to see the dollars associated with the %'s of 2, 3, 4 and 5
6. Sends the survey when the Appointment is completed
7. Allow GP\$'s to equal labor units
8. Hide unit warranty from all proposals
9. Allow S/R to delete proposals
10. Hide unit descriptions from ALL proposals
11. Move the terms and conditions below the upgrades and options



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# Company Defaults

Won Email	<input type="text" value="dewayne@entsellingsolutions.com, shannon@entsellingsolutio"/>				<a href="#">12.</a>
Financial Summary Email	<input type="text" value="dewayne@entsellingsolutions.com, shannon@entsellingsolutio"/>				<a href="#">13.</a>
Labor Cost Per Unit	<input type="text" value="240.00"/>				<a href="#">14.</a>
Min. Gross Margin	<input type="text" value="1"/>				<a href="#">15.</a>
Final Price Text	<input type="text" value="You Invest"/>				<a href="#">16.</a>
Quality Headers	Best	Better	Good	Budget	
GM %	<input type="text" value="39"/>	<input type="text" value="42"/>	<input type="text" value="44"/>	<input type="text" value="45"/>	<a href="#">17.</a>
GP \$	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<a href="#">18.</a>
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"/>	<a href="#">19.</a>
Commission %	<input type="text" value="10"/>	<input type="text" value="8"/>	<input type="text" value="6"/>	<input type="text" value="2"/>	<a href="#">20.</a>
Buy Down Rate %	<input type="text" value="18"/>	<input type="text" value="8"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<a href="#">21.</a>
Interest Rate	<input type="text" value="0"/>	<input type="text" value="3.90"/>	<input type="text" value="5.90"/>	<input type="text" value="9.90"/>	<a href="#">22.</a>
Years Financed	<input type="text" value="5"/>	<input type="text" value="4"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<a href="#">23.</a>
Minimum %	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<a href="#">24.</a>



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Monetize

# Company Defaults

12. Email that goes to whomever is designated. Email that can be used to communicate the work to be completed.
13. Email that goes typically to “KEY” people. This email will have the costs, margins, labor, and all financial information for job costing purposes.
14. Labor cost per “Unit”. This is listed so the dealer can monetize their unit of labor for listing on the proposal. Example:... By the day, by the hour, by the job.
15. If you are allowing the salesperson to see and modify gross margin %, you can set a minimum here.
16. Change this wording to describe the price on the proposal.
17. Enter here the Gross Margin percentage desired for each level. The formula is  $(COGS / (1 - \text{desired margin } \%) = \text{Selling Price})$
18. In the event the company is using the GP\$ model, this will allow the labor units to equal the GP\$ units and add the appropriate GP\$'s based on the amount entered on the proposal.
19. Enter the prevailing tax that you PAY to your supplier. If you are in a state that taxes the entire selling price, enter the tax into the “Buydown Rate” area.
20. Enter your commission here as a percentage.
21. Enter your buydown rate here as a percentage. It is reflected by the amount you are being charged by the finance company.
22. Enter the interest rate you want to show the customer as a payment
23. Enter the term you want to show the customer as a length of the loan.
24. Enter the minimum percentage if you are offering a same as cash, with payment option for the customer. Leaving this as a zero will remove the verbiage on “Minimum Percentage” on the proposal.



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Agreement: I agree to the terms and conditions of the use and implementation of this site. I agree to accept all responsibility whether in whole or in part the legal ramifications of accepting digital signatures from my clients. I also agree to hold ESS, it's employees, subsidiaries and vendors harmless from legal action and/or impunity. I will not use this site for illegal or unethical means and recognize it is protected under Federal copyright laws.

Sign this agreement:



August 11, 2017

To Accept digital signatures on your proposals and service tickets you must accept and sign our terms for this option.

Terms & Conditions

1. [To View The HVAC Opcost website - CLICK THIS LINK!](#)

2. [To Apply for Financing](#)

**TERMS & CONDITIONS OF AGREEMENT**

1. Purchaser hereby accepts the equipment and service described above and agrees to pay Enterprise Selling Solutions, Inc. the price shown above.

2. All equipment and material are guaranteed by Enterprise Selling Solutions, Inc. to be as specified. All work will be completed in a workmanlike manner according to normally accepted practices.

3. Materials and work in addition to that described herein will be furnished only on Purchaser's authorization and will be paid by Purchaser as an extra charge.

Enter your terms and conditions. You are welcome to use our provided terms and conditions. Make sure you run them by your counsel. You also can use the HTML editor to modify fonts, enter links, and include pictures.



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**SERVICE DETAILS**

Included Services 28. x

Details <span>24.</span>	Price <span>25.</span>	Margin <span>26.</span>	Order <span>27.</span>
INSTALL AC SYSTEM	\$ 500.00	<input type="checkbox"/>	0
INSTALL HP SYSTEM	\$ 600.00	<input type="checkbox"/>	0

x

Service Details are “Included Services” or Actions that you are going to perform on the job. The details are seen by the consumer. The value of cost is not.

24. Enter here the details you want to communicate

25. Enter here the value of the action

26. Check this box when you want to “Margin” the action.

27. This will allow you to order the actions on the “edit-proposal” area. 1 would appear in the order first. 2 would be second.

You can add as many of these as you wish and they will appear as options on templates.

**Microf Details**

Microf Company ID <span>28.</span>	Microf Username <span>29.</span>	Microf Password <span>30.</span>
	travis@designextensions.com	*****

28. To Utilize Microf. Leave the first option blank

29. Enter your Microf provided ID here

30. Enter your Microf provided password here



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CREDITS/REBATES/  
DISCOUNTS

31.	32.	33.	34.	35.	36.	
Details	Method	Cap	Apply to Selling Price	% or \$	Order	
Service Discount	%	300.00	<input type="checkbox"/>	5.00	15	x
Loyal Customer	\$	0.00	<input type="checkbox"/>	10.00	16	x
Senior Citizen Discount	%	0.00	<input type="checkbox"/>	0.00	18	x
Price Match	\$	0.00	<input type="checkbox"/>	200.00	19	x

- 31. Enter here your credits, rebates and discount
- 32. The method of discount should be chosen here. % or \$
- 33. In the case you want to CAP a discount, enter the capped amount here.
- 34. Clicking this box will apply the discount to the selling price. Not selecting the box will show the number below the selling price and list it as an "Other Incentive".
- 35. Enter here the amount of the discount
- 36. This will order the discounts on the template based on the order you place them.

EXTRA TIP -




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UPGRADES

37.	38.	39.	40.
<b>Air Purifier</b>  Traps and Kills Air Pollutants: Purifies, Doesn't merely Filter The award-winning Infinity Air Purifier doesn't just filter air, it captures and kills	1250.00	Choose File No file chosen	<iframe width="420" height="315" src="http://www.youtube">
<b>Guardian Air</b>  by RGF® is designed to eliminate sick building syndrome risks by reducing odors, air pollutants, VOCs (chemical odors), smoke, mold	1250.00	Choose File No file chosen	<iframe width="560" height="315" src="http://www.youtube">
<b>Guardian Air</b>  by RGF® is designed to eliminate sick building syndrome risks by reducing odors, air pollutants, VOCs (chemical odors), smoke, mold bacteria	950.00	Choose File No file chosen	<iframe width="560" height="315" src="http://www.youtube">

37. Enter any upgrades you want to show on the proposal.

38. Enter the VALUE that you want to sell the upgrade for.

This is your selling cost.

39. To add a photo to the upgrade, choose this option. The file should be a PNG and/or Jpeg in nature.

40. To add a video you can choose embed code from sites like Youtube or Vimeo. This must be embed code and NOT a link.

Once you are completed with this area, you must click **SAVE** at the bottom of the page.

If you are working on this over some time, we suggest constantly saving the work that you are performing. There isn't an "auto-save" feature for a website.



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Enter the range of offering for your proposal based on the criteria listed to the left.

	Best		Better		Good		Budget	
	Max	Min	Max	Min	Max	Min	Max	Min
SEER	<input type="text" value="21"/>	<input type="text" value="14"/>	<input type="text" value="19"/>	<input type="text" value="14"/>	<input type="text" value="16"/>	<input type="text" value="14"/>	<input type="text" value="16"/>	<input type="text" value="13"/>
EER	<input type="text" value="15"/>	<input type="text" value="9"/>	<input type="text" value="15"/>	<input type="text" value="8"/>	<input type="text" value="13"/>	<input type="text" value="8"/>	<input type="text" value="12"/>	<input type="text" value="8"/>
HSPF	<input type="text" value="15"/>	<input type="text" value="9"/>	<input type="text" value="12"/>	<input type="text" value="8"/>	<input type="text" value="10"/>	<input type="text" value="7"/>	<input type="text" value="9"/>	<input type="text" value="7"/>
AFUE (%)	<input type="text" value="99"/>	<input type="text" value="80"/>	<input type="text" value="99"/>	<input type="text" value="80"/>	<input type="text" value="97"/>	<input type="text" value="80"/>	<input type="text" value="95"/>	<input type="text" value="80"/>

41. Click on My Profile in the Top Right

42. Choose the "AHRI Search Defaults"

43. You can always watch the video placed here at the question mark

Special Part kits	Part <sup>44.</sup>	Price <sup>45.</sup>	Order
	<input type="text" value="5 KW heater"/>	<input type="text" value="55.00"/>	<input type="text" value="1"/> ✕
	<input type="text" value="8 KW heater"/>	<input type="text" value="85.00"/>	<input type="text" value="2"/> ✕
	<input type="text" value="10 KW heater"/>	<input type="text" value="105.00"/>	<input type="text" value="3"/> ✕
	<input type="text" value="9-kW Three Stage Heater"/>	<input type="text" value="92.00"/>	<input type="text" value="4"/> ✕
	<input type="text" value="Heat Pump Materials Kit"/>	<input type="text" value="300.00"/>	<input type="text" value="4"/> ✕

44. Enter here any special part that you might want to add to a system using the wizard

45. Enter the cost of that part. It will be margined.



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Enter the range of offering for your proposal based on the criteria listed to the left.

	Best		Better		Good		Budget	
	Max	Min	Max	Min	Max	Min	Max	Min
SEER	<input type="text" value="21"/>	<input type="text" value="14"/>	<input type="text" value="19"/>	<input type="text" value="14"/>	<input type="text" value="16"/>	<input type="text" value="14"/>	<input type="text" value="16"/>	<input type="text" value="13"/>
EER	<input type="text" value="15"/>	<input type="text" value="9"/>	<input type="text" value="15"/>	<input type="text" value="8"/>	<input type="text" value="13"/>	<input type="text" value="8"/>	<input type="text" value="12"/>	<input type="text" value="8"/>
HSPF	<input type="text" value="15"/>	<input type="text" value="9"/>	<input type="text" value="12"/>	<input type="text" value="8"/>	<input type="text" value="10"/>	<input type="text" value="7"/>	<input type="text" value="9"/>	<input type="text" value="7"/>
AFUE (%)	<input type="text" value="99"/>	<input type="text" value="80"/>	<input type="text" value="99"/>	<input type="text" value="80"/>	<input type="text" value="97"/>	<input type="text" value="80"/>	<input type="text" value="95"/>	<input type="text" value="80"/>

41. Click on My Profile in the Top Right

42. Choose the "AHRI Search Defaults"

43. You can always watch the video placed here at the question mark

Special Part kits	Part <sup>44.</sup>	Price <sup>45.</sup>	Order
	<input type="text" value="5 KW heater"/>	<input type="text" value="55.00"/>	<input type="text" value="1"/> ×
	<input type="text" value="8 KW heater"/>	<input type="text" value="85.00"/>	<input type="text" value="2"/> ×
	<input type="text" value="10 KW heater"/>	<input type="text" value="105.00"/>	<input type="text" value="3"/> ×
	<input type="text" value="9-kW Three Stage Heater"/>	<input type="text" value="92.00"/>	<input type="text" value="4"/> ×
	<input type="text" value="Heat Pump Materials Kit"/>	<input type="text" value="300.00"/>	<input type="text" value="4"/> ×

44. Enter here any special part that you might want to add to a system using the wizard

45. Enter the cost of that part. It will be margined.





Dashboard Customers Proposals Service Tickets Parts Dispatch Reports Units More

46. My Profile Help Logout

My Profile  
Home / My Profile

47. Company Defaults AHRI Search Defaults Load Analyzer Defaults Service Ticket Defaults Appointment Defaults

Heating Requirements(Glass) - Heating Multiplier  30°F  40°F  60°F  80°F 55.

Walls, Ceilings, Doors, Roof and Floor Area - Heating Multiplier  30°F  40°F  60°F  80°F 54.

Walls, Ceilings, Doors, Roof and Floor Area - Cooling Multiplier  15°F  20°F  M 53.

47. Winter Outside

48. Winter Inside

49. Summer Grains

50. Summer Outside

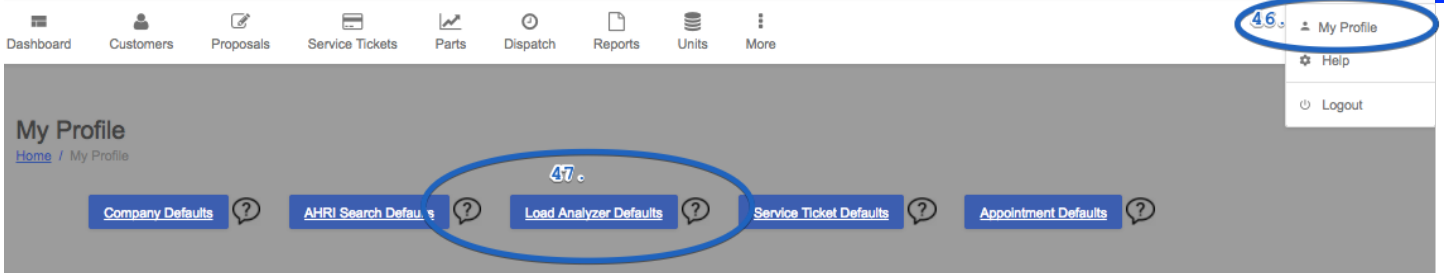
51. Summer Inside

52. Summer Daily Range

46. [Design Conditions](#)

Save





46. Open Up the "Design Conditions" link at the bottom
47. Enter your "Winter Outside" temperature
48. Enter your "Winter Inside" temperature
49. Enter your "Summer Grains"
50. Enter your "Summer Outside" temperature
51. Enter your "Summer Inside" temperature
52. Enter your "Summer Daily Range"
53. Subtract your Summer Outside from your Summer Inside and choose a temperature that is closest to 15 or 20 degrees. Choose L or M if your summer daily range is Low or Medium
54. Subtract your Winter inside temperature from your winter outside temperature. Take that temperature and select the appropriate radio button based on that math.
55. Subtract your Winter inside temperature from your winter outside temperature. Take that temperature and select the appropriate radio button based on that math.

Once you are completed with this area, you must click **SAVE** at the bottom of the page.

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Dashboard Customers Proposals Service Tickets Parts Dispatch Reports Units More

56. My Profile Help Logout

My Profile  
Home / My Profile

57. Company Defaults AHRI Search Defaults Load Analyzer Defaults Service Ticket Defaults Appointment Defaults

56. Go to "My Profile" and

57. Click on "Service Ticket Defaults"

Service Values

Field Name 58.

Serial Number of Unit		x
Indoor Fan Voltage		x
Outdoor Fan Amperage		x
Outdoor Fan Voltage		x

58. Enter the service values that currently appear on your current service tickets.

59. Technician Labor Rate 125

What is your after hours rate 60. 175

I don't pay tax, I Charge it to my customer 61.

What is your tax rate you pay to your supplier? 62. 6



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59. Enter your technician hourly rate. This is the cost of labor you want to charge the customer. The labor rate will be multiplied by the number of hours that will be assigned to each part by the admin.
60. Enter your secondary rate here. It can be an after hours rate or if you have a plumbing rate it can be entered here.
61. When the dealer charges the customer the tax for service parts, this box should be checked.
62. Enter here the tax rate you pay to your supplier. If you checked the box in 61, enter your tax rate you charge your customer.

Once you are completed with this area, you must click **SAVE** at the bottom of the page.

If you are working on this over some time, we suggest constantly saving the work that you are performing.



Enter the markup for the desired pricing

0	to	<input type="text" value="25"/>	<input type="text" value="600"/>	%
25.99	to	<input type="text" value="50"/>	<input type="text" value="450"/>	%
50.99	to	<input type="text" value="100"/>	<input type="text" value="400"/>	%
100.99	to	<input type="text" value="200"/>	<input type="text" value="300"/>	%
200.99	to	<input type="text" value="300"/>	<input type="text" value="200"/>	%
300.99	to	<input type="text" value="500"/>	<input type="text" value="150"/>	%
500.99	to	Infinity	<input type="text" value="125"/>	%

63.

Please Fill out here what your maintenance plan is for your company

is our discount for maintenance customers. Our maintenance plan includes TWO visits a year by one of our

64.

What is your Discount for Preventative Maintenance

%

65.

What do you charge for Refrigerant

	1st lb	2nd lb
R22	<input type="text" value="75"/>	<input type="text" value="75"/>
R410A	<input type="text" value="60"/>	<input type="text" value="60"/>

66.

Diagnostic Fee

67.



63. Enter the desired markup you want for a part. Example. (0 – 25 cost of part 600%) \$10 part = \$60. There is a spreadsheet at the bottom that will assist you with determining the desired markups.
64. Describe here your maintenance discount verbiage.
65. Enter here your discount for maintenance customers
66. Enter here your cost of refrigerants.
67. Enter here your diagnostic fees for your service calls.  
Note: This value can be changed at the service ticket level.

Once you are completed with this area, you must click **SAVE** at the bottom of the page.

If you are working on this over some time, we suggest constantly saving the work that you are performing.



Dashboard Customers Proposals Service Tickets Parts Dispatch Reports Units More

68. My Profile  
Help  
Logout

My Profile  
Home / My Profile

Company Defaults AHRI Search Defaults Load Analyzer Defaults Service Ticket Defaults Appointment Defaults

69.

68. Go to "My Profile" and  
69. Click on "Appointment Defaults"

Default Appointment Set Up Email

70.

Hi, I am DeWayne Gibson with Enterprise Selling Solutions. As the owner of ESS I would like to take a moment and thank you for allowing us to come to your home or office and take care of your cooling and/or heating needs. We pride ourselves on getting it done right the first time. For that reason we spend many hours training our representatives so they are always the most knowledgeable in our industry and market.

Assuming our schedule stays on course, Our plan is to see you in the time range we set with you today. Should for some reason our plans change we will notify you of those changes in the most convenient time. Please let us know via call or email that your plans may change.

Staying COOL,  
<https://youtu.be/aUgcvSQDYXo>

Default Completed Appointment Email

71.

Thank you for allowing us to take care of your home's needs. We are sending you a four question survey about our technician. Please take a moment and let us know how we are doing.

Kindest Regards,  
DeWayne Gibson

body

70. Enter here the thank you message you want the customer to receive when they set an appointment with your company

71. Enter here the COMPLETED thank you message for an appointment.



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# Appointment Defaults

Service Values	Service Name
72.	Replacement Department
	Service Department

72. Enter your Departments that you have within your company


Appointment Types	Appointment Type Name
73.	AOR Call
	Service Call
	IAQ Call

73. Enter here specific activities that happen within a department

Certified Logos
74.

BBB-A-plus-seal-Copy.jpg

Select File



74. Enter here any logos that your techs have earned as a result of training, education and/or background checks.

Once you are completed with this area, you must click **SAVE** at the bottom of the page. If you are working on this over some time, we suggest constantly saving the work that you are performing.







Thank you for attending our class.

We pride ourselves on communication. You can follow our posts, blogs, and information output at...

[www.entsellingsolutions.com](http://www.entsellingsolutions.com)

[www.facebook.com/entsellingsolutions](http://www.facebook.com/entsellingsolutions)

Resources we may have discussed during the class.

<https://buildingabusinesshatlasts.com/>

<http://www.prestonsguide.com/>

<http://www.grandyassociates.com/>

<https://microf.com/>

<https://designextensions.com/>

<https://hvacbizpro.com/new/>

The ESS Team



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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...

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



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