

Home Comfort Certified System®



User Guide

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Table of Contents

WHAT IS FLAT RATE SYSTEM INSTALLATION PRICING?	3
WHY DO RESIDENTIAL HVAC CONTRACTORS NEED THE HOME COMFORT PRICE GUIDE?	3
WHY DO YOU NEED THE BUILT-IN PROFESSIONAL SELLING SYSTEM?	4
HOW DO YOU IMPORT THE HOME COMFORT PRICING DATA INTO ACCOUNTING OR DISPATCHING SOFTWARE?	5
WHY IS OUR SYSTEM YOUR BEST OPTION IN TIME AND MONEY?	5
HOW IS THE HOME COMFORT CERTIFIED SYSTEM PRICE BOOK MADE?	6
HOW DO YOU USE THE <i>HOME COMFORT CERTIFIED SYSTEM PRICE BOOK</i>?	7
WHAT IS THE LAYOUT OF THE <i>HOME COMFORT CERTIFIED SYSTEM PRICE BOOK</i>?	10
FILLING OUT THE “HOME COMFORT SET-UP AND ORDER ENTRY FORM”	11
INSTALLATION LABOR SET-UP	11
VEHICLE / MISCELLANEOUS SET-UP	12
GEOTHERMAL WELL SUBCONTRACTOR SET-UP	12
GEOTHERMAL ELECTRICAL SUBCONTRACTOR SET-UP	13
CUSTOMER UTILITY RATES SET-UP	13
HEATING & COOLING LOAD HOURS SET-UP	13
CUSTOMER FINANCING INTEREST RATES SET-UP	13
GROSS PROFIT MARGIN SET-UP	13
COMPANY INFORMATION SET-UP	14
DOWNLOADING THE <i>HOME COMFORT CERTIFIED SYSTEM GUIDE</i>:	14
PRICE DELIVERY PROCESS	14
PRICE GUIDE UPDATING PROCESS	14
APPENDICES	15
APPENDIX A – SELECTING THE GOOD-BETTER-BEST-PREMIUM SYSTEM CONFIGURATIONS	15
APPENDIX B – INSTALLATION COSTING FOR EACH SYSTEM CONFIGURATION	16
<i>Split Air Conditioning with Furnace</i>	17
<i>Split Air Conditioning with Electric Heat</i>	17
<i>Split Air Conditioning Add-on</i>	18
<i>Air Conditioning Condenser or Heat Pump Only</i>	18
<i>Split Heat Pump</i>	19
<i>Split Dual Fuel (or ‘Hybrid System’)</i>	20
<i>Geothermal Packaged Heat Pump</i>	20
<i>Geothermal Split System Heat Pump</i>	21
<i>Packaged AC / Gas Heat</i>	22
<i>Packaged AC / Electric Heat</i>	22
<i>Packaged Heat Pump</i>	23
<i>Packaged Dual Fuel</i>	23
<i>Furnace Only</i>	24
<i>Boiler Only</i>	24

<i>Air Handler/Fan Coil or Indoor Coil Only</i>	25
APPENDIX C – ENHANCEMENTS, ACCESSORIES & IAQ ESSENTIALS	25
APPENDIX D – DATA TABLE FOR UPLOAD TO DISPATCHING AND/OR ACCOUNTING SOFTWARE	26
APPENDIX E – DETERMINING YOUR JOB COSTS FROM THE PRESENTATION PRICE	27

WHAT IS FLAT RATE SYSTEM INSTALLATION PRICING?

Flat rate system installation pricing is the term retail residential HVAC contractors use to describe providing a fixed upfront price to the customer for a specific equipment installation. To the customer it is an “upfront price” because the price that is quoted before the work begins is the price the customer will pay. The customer always knows the total investment for the work before any work is done. Naturally, customers love this type of pricing because they can budget the work to a fixed dollar amount without any surprises.

Many residential HVAC contractors still quote a single price by the job without itemization. Unfortunately, most customers do not fully understand what is included in the quoted price. This may cause them to suspect that the price is higher than necessary or, even worse, to feel that they are getting ripped-off.

The “open book” approach used in our *Home Comfort Certified System* flat rate process helps eliminate objections. While reviewing with the customer the *Investment Options Worksheet* objections are easily handled, and their unique equipment and installation options can be explored. This process handles most objections to equipment, installation, or pricing before they are even raised. Due to this open book approach, typically the only issues that will have to be dealt with are installation timing issues.

Home Comfort pricing objective is to recover 100% of the installation employee costs:

- 40%+ travel & non-chargeable billable hour recovery
- 25%+ overhead cost recovery
- 100% warranty labor & material support costs recovery
- 20%+ Net profit before taxes

WHY DO RESIDENTIAL HVAC CONTRACTORS NEED THE HOME COMFORT PRICE GUIDE?

1. It enables your company to open the hiring field to non-technical sales people who are often better suited to selling to consumers.
2. It allows your retail residential HVAC installation business to charge a rate that recovers installation department overhead to be profitable but without alienating your customer.
3. It improves the professional appearance of your company’s sales people and/or selling technicians.
4. It helps demonstrate that you and your company have the experience with the type of problem your customer has, since the installation they need is described and already priced in a flat rate price book.
5. When you quote out of the flat rate price book, the math is already done, the proper spelling is right

in front of you, and the customer is assured that they are paying the same price as everyone else.

6. It improves customer satisfaction. Why?

- Customers are happier due to the high level of professionalism during the sales call.
- The upfront approval they give improves the collections process later.
- It helps eliminate complaints of “*the price is too high*”.

WHY DO YOU NEED THE BUILT-IN PROFESSIONAL SELLING SYSTEM?

The truth is 7 out of 10 contractors do not use proper equipment installation upfront pricing due to:

- The high administrative cost of maintaining and updating costs in their price book for each of the thousands of equipment installation tasks or system enhancement installation types.
- Not being able to afford the high cost that can typically run from \$1500 - \$3500 upfront with an additional \$65+/month per book.
- Poor business/pricing understanding.
- Not feeling comfortable or proficient enough with computers to install software, or to navigate or modify databases to meet the ever-changing pricing requirements.

The only way customers can protect themselves is through careful evaluation of the contractor that responds to their call. One way you help your customers conclude that you are such a viable option is to meet their unique installation requirements. This is easily communicated through our *Home Comfort Certified System* branded installation solution. The *Home Comfort Certified System* flat rate pricing and selling approach has proven to have the added benefits of improving your professional image while increasing profit margins by:

- Making it easy for the customer to understand your unique solution for them.
- Setting your offer apart from those of the competition.
- Showing that your company has a standardized business delivery process.
- Having an associated higher professional and quality image.
- Having the ability to yield higher margins over the competition.
- Making it easier to communicate a common purpose to protect the customer’s investment.
- Systematically communicating your entire value proposition leaving no unanswered questions.
- Minimizing any objections by addressing all pre- and post-installation items.
- Exploring all financing options or addressing any concerns of which most customers aren’t even aware.
- Assisting the customer in advance of the purchase decision.
- Raising the benchmark for which all your competitors will be compared.
- Closing the sales on the first call more often.

HOW DO YOU IMPORT THE HOME COMFORT PRICING DATA INTO ACCOUNTING OR DISPATCHING SOFTWARE?

Integrating your *Home Comfort Certified System* with your accounting and/or dispatching software can streamline your activity in the office. We can provide a data table that is compatible with most software. Do you want to request this feature? Here's how:

1. Do you only subscribe to a single Home Comfort Price Guide? Obtain the upload file simply by upgrading to the 3 Price Guide Set.
2. Do you subscribe to Ready-Built HVAC programs that include a 3 Price Guide Set? Obtain the upload file for no additional cost simply by executing a separate Agreement.
3. Do you subscribe to the 3 Price Guide set, but your Set-up & Order Entry Form does not have the wording "*with CSV Upload*" at the top? Obtain the upload file for no additional cost simply by executing a separate Agreement.
4. Do you subscribe to the 3 Price Guide set, and your Set-up & Order Entry Form already has the wording "*with CSV Upload*" at the top? Obtain the upload file for no additional cost simply by requesting it.

See "Appendix D – Data table for upload to dispatching and/or accounting software" on page 26 for more details about this file for uploading.

WHY IS OUR SYSTEM YOUR BEST OPTION IN TIME AND MONEY?

Most other flat rate programs:

1. Are too complex for the user requiring computer skills and business sophistication.
2. Must be maintained by the contractor at a high administrative time cost.

Benefits using our program:

1. Simple system configuration set-up using a spreadsheet or other convenient methods.
2. No database maintenance; we maintain the book for you.
3. A small investment which is typically recovered on your very first sales call.
4. This guide includes online recorded and live training and implementation support, right-at-your staff's desktops or handheld devices.
5. Includes a service agreement selling system with access to service agreement print documents.
6. Includes a selling tech/comfort advisor system replacement "One-Call Selling System" with access to HVAC and boiler replacement proposal agreement printed documents.
7. Includes selling tech/comfort advisor soft communication skills training.
8. Includes pricing database upload files for QuickBooks or any field management software program.
9. No required software aside from any PDF document reader. (See more information in "Downloading the *Home Comfort Certified System* guide:" on page 14.)

HOW IS THE HOME COMFORT CERTIFIED SYSTEM PRICE BOOK MADE?

The Home Comfort Certified System installation presentation price book uses industry average tasking labor time for each system installation type. Then it uses the costs from your wholesale HVAC distributor partner for equipment and installation materials. The cost databases from your distributor are updated continuously on your behalf. It also uses your labor rates and profit margins which can be customized based on your own actual financial performance requirements.

To quickly obtain a price book for your company, all we need are your: company name and address and phone number, actual labor cost rates, equipment costs, and state sales tax rate. For details on additional information that you can provide us, please see the section Filling out the “Home Comfort Set-up and Order Entry Form” on page 11.)

Included is an introductory section to be used by your Comfort Advisor or selling technician to review with the customer. This section helps professionalize the sales call by explaining to your customer:

- a. Your company’s mission statement and how it relates to their best interests.
- b. What makes you different and why you are the preferred HVAC company in the area.
- c. The process you will use to find the best solution for your customer.
- d. Why your company must set the standards of performance in your area.
- e. The quality your customer can expect before, during, and after the installation.
- f. How you will be sitting down with your customer after the installation survey to explore their purchase options.

The Home Comfort Certified System price book is presently being used by hundreds of retail residential HVAC companies across the US and Canada. In addition to using your company’s own costs, we can also use your known labor hours for each type of system installation. Please see “Appendix B – Installation costing for each system configuration” on page 16.

You will be asked to specify what equipment match-ups you want to offer in the good-better-best-premium system configurations. We can change the match-ups for you at any time at no additional cost. Please see “Appendix A – Selecting the Good-Better-Best-Premium system configurations” on page 15. Any changes we make for you to your system configurations will be saved for future updates to your book.

We can also put your company logo on the cover page and customize wording for you in any section of the price book. We allow up to 20 text changes or global word/phrase replacements or any combination thereof. If you require additional changes or any other modifications then prior to proceeding with any work we will provide you a quote based on a \$75 fee for each hour required to customize your price book. This quote and a credit card authorization form will be sent to your email address for approval. Any customizations we make for you will be saved for future updates to your price book.

The only caution we give to new users of the price book is to not try to ‘reinvent the wheel’. Also, if a requested modification could adversely affect the selling process that has been carefully designed in the Home Comfort Certified System, we will discuss with you your specific needs. Once it is decided what changes are needed for your company then simply print out the pages that need changes and clearly write your changes on these pages. Then scan back those marked up pages to your assigned coach or fax them to us at [603-386-6342](tel:603-386-6342).

If no customizations are required for your price book, then we can have your completed price book to you in PDF format within 3 to 5 business days from receipt of your order entry form and your equipment

configuration set-up worksheet. If there will be customizations, then please allow up to 5 business days after processing the approved authorization form.

If you are seeking to professionalize your selling process, then please visit our website at www.GrowMyHVAC.com and check out our online HVAC contractor support training center. Our flat rate installation and service repair price books are integrated into our complete “A through Z” best-practice training tracks and associated forms for your retail residential service and installation departments.

Our complete business operating packages are sold separately. There are 8 packages to choose from. Each one provides a set of proven business processes, methodologies, and governances for a successful retail residential or commercial HVAC service business. These packages are designed to FAST TRACK your business growth and development efforts.

8 Package options:

1. Retail residential HVAC business operating system & forms
2. Commercial HVAC service business operating system & forms
3. Combined retail residential and commercial HVAC service business operating system & forms
4. Website development and hosting service
5. Mobil Service Manager built on a RazorSync platform which ties seamlessly into QuickBooks
6. Combined retail residential and commercial HVAC service business operating system & forms PLUS website development and hosting service
7. Combined retail residential and commercial HVAC service business operating system & forms PLUS Mobil Service Manager
8. Combined retail residential and commercial HVAC service business operating system & forms PLUS website development and hosting service PLUS Mobil Service Manager

HOW DO YOU USE THE *HOME COMFORT CERTIFIED SYSTEM PRICE BOOK?*

We recommend using a proven, best-practice, step-by-step, ‘Professional One-Call Sales Call Handling Process’ that the Comfort Advisor or selling technician would use on an installation sales call. You can find more detailed information in the “Ready-Built HVAC Residential Installation Department” training track on our online training support at www.GrowMyHVAC.com.

The two types of selling situations:

1. Where a repair is 40%+ of a new system replacement and sold by a selling tech
2. Request for quotes due to no trust and sold by a selling tech or comfort advisor

On a repair that would be 40%+ or more of a system replacement:

1. Selling tech leads with “BEST” option with no discount. – It is not about “price” but instead “get me hot or cold”.
2. Present the replacement proposal. – Skip directly to step #10 below.

On a request for a system replacement quote where the customer did not buy from original HVAC contractor due to no trust:

1. Prepare for the call – This involves making the right impression by taking pride in your personal appearance, having the “do the right thing” attitude, having a set of “Install-Right Survey” open

ended sales advancement questions, and identifying the customer's buying preferences from evidence around them.

2. Arrive at the call – This involves parking the company's vehicle properly and double-checking personal appearance, using breath mints, and properly approaching the customer's home.
3. Greet the customer – This includes knocking on door properly, offering a proper handshake, verifying the purpose of the visit, and presenting a business card.
4. Professional Call Handling – Since this is a long term and important investment decision for the customer you open your Home Comfort presentation price guide. Review with your customer the need to answer some common questions they may have, as well as to verify the customer's personal and HVAC system's replacement needs. Before proceeding to do the survey, (use our Home Use and Livability Survey Form if you are an active Ready-Built HVAC Program subscriber) give the customer a compelling reason to buy from you by using the first few pages to review:
 - a. Who are you and your company, and what makes you different?
 - b. What process will you use to find the best solution for them?
 - c. Why must your company set the standards of performance in your area?
 - d. What can your customer expect before, during, and after the installation?
5. Survey & Review with the customer – Use the *Home Use & Livability Survey* with the customer to verify system replacement scope of work and customer pricing requirements, review with the customer the present situation versus their needs/wants, and the completed survey form. Get the customer's agreement on the survey's 5-key category findings and solutions.
 - a. Home Use requirements
 - b. Comfort requirements
 - c. Health/Safety requirements
 - d. Property requirements
 - e. Financial requirements
6. Perform "Manual J" load calculation – Then ask permission to proceed with a system load analysis. While you are doing so you can hand the *Home Comfort* book to the customer and explain that they can look at actual pictures of poor installations you have come across in the area, as well as some of your own company's past installations.
7. Finalize Pricing – You select your "best" option from the Home Comfort pricing section, the equipment component by size(s) and efficiency(s), and verify with the customer any additional work required, and/or any needed enhancement options discovered during the survey.
8. Fill out the *Investment Option Worksheet* – Using a blank copy of the *Investment Option Worksheet* from your Home Comfort pricing section, enter the following:
 - a. The itemized selected equipment and associated prices.
 - b. The customer's selected accessories and associated prices.
 - c. Any required system modifications and associated prices.
 - d. Use the *Rebate Pricing Companion* to get down to a walkaway gross profit margin.
 - e. Add up all the installation prices and enter the customer's total investment after rebate.
 - f. Write in the customer's estimated monthly energy savings using the *Energy Savings* tables.
 - g. Write in the monthly payment using the Home Equity finance table monthly payment amount that closely matches the energy savings amount.
 - h. Calculate and enter the customer's net monthly cost of ownership.

9. Review how affordable the recommended investment will be – Review each investment line-item and associated benefits. Then obtain permission (your first trial close) to proceed with preparing a proposal.
10. Present the replacement proposal – To help the customer get what they want, you prepare an *Installed-Right Proposal Agreement* with the customer present. You will then:
 - a. Read each line-item while explaining the associated benefits.
 - b. Explain the proposal terms and conditions.
 - c. Explain the installation implementation process the company will use.
 - d. Handle any objections the customer may have.
11. Close the Sale – The customer makes the minimum deposit at time of signing to secure the installation.
 - a. If not sold – Then do raise the competitive bar, (If an active Ready-Built HVAC Program subscriber, our *Which Contractor Best Meets Your Needs questionnaire*) and to
 - b. If sold, Job turnover to operations – Complete the job booking documents and turn the job folder over to the Installation Manager for execution:
 - i. Include executed agreement
 - ii. Include completed Install-Right Solution Survey (see Ready-Built Program)
 - iii. Include Mechanical Code Checklist form (see Ready-Built Program)
 - iv. Check off that each booking item is complete in the Job File Folder (see Ready-Built Program)
 - (1) Enter rebates and discounts where shown
 - (2) Enter copper sizes
 - (3) Enter breaker sizes
 - (4) Make sure to take CLEAR pictures as itemized
 - v. Take pictures of contract and cover of job folder and forward to Installation Manager.
12. Equipment Ordered and Installation Scheduled – The Installation Manager orders equipment, materials and supplies and schedules installation. (see Ready-Built Program)
13. Complete the Installation Work Order – The Installation Manager completes the Installation Work Order and communicates directly with the assigned Crew Chief giving job site pictures, booking documentation and Installation Work Order. (see Ready-Built Program)
14. Process Manufacturer Rebates and Utility Rebates – The Installation Manager/Scheduler completes and submits rebate paperwork.
15. Process incentive payments – The Installation Manager/Scheduler completes incentive paperwork and submits selling tech/comfort advisor customer rewards and or Installation Subcontractor fees. (see Ready-Built Program)
16. Installation coordinated with the customer – The Installation Coordinator calls the customer to set up a time. (see Ready-Built Program)
17. Job staging and mobilization – The Installation Manager/Scheduler/Crew Chief pulls all equipment and materials and makes them ready for the Installation Crew prior to departing for the customer's home, minimizing any disruptions to use and comfort. (see Ready-Built Program)
18. Field Communication Documentation created – The Installation Manager creates the field communication and installation instructions. (see Ready-Built Program)
19. Installation Crew arrival – The customer is notified by the Installation Coordinator of the expected arrival time of the installation crew and the expected completion time of the job.

20. Installation completion – We can provide a “Start-up, Test and Verification” form for the Installation Crew to present to the customer for customer sign-off and final invoicing. (see Ready-Built Program)
21. Final payment – The final payment is due upon the signing of the final invoice and prior to the departure of the Installation Crew. If final payment will be by cash, then the Installation Manager, Installation Coordinator, Comfort Advisor or selling technician requests that the check be made ready and given to the Crew Chief upon job completion. If the customer cannot be present upon completion, they must sign the final invoice and provide payment before departing.
22. Post-installation completion – The Comfort Advisor or selling technician verifies that there are no further questions or concerns that need to be discussed. If not, then he/she proceeds to close out the job. The company will be able to obtain additional high-margin business through referrals simply by following through on the promises made to the customer during the approach portion of the sales process. (see Ready-Built Program)
23. Happy Follow-up Call with the customer – The Comfort Advisor’s or selling technician’s post-installation follow-up tasking should include a scheduled visit with the customer to:
 - a. Review equipment and accessory operation
 - b. Answer any customer questions
 - c. Present warranty management process
 - d. Present service agreement
 - e. Present ‘Friends & Family Program’
 - f. Ask for referrals
 - g. Update customer direct mail list

WHAT IS THE LAYOUT OF THE *HOME COMFORT CERTIFIED SYSTEM* PRICE BOOK?

This explains the sections we provide in the price book that you will receive. More details can be found in our “Ready-Built HVAC Residential Installation Department” training track located on our website at www.GrowMyHVAC.com.

1. Cover Page – Presents your company’s name and address, the equipment brand used, and if requested your company logo. (Your company’s logo can be included here if requested.)
2. License Agreement – A necessary document of legal terms and conditions explaining your right to use the *Home Comfort Certified System* price book. **NOTE: THIS PAGE SHOULD NOT BE PUT IN THE PRESENTATION PRICE BOOKS USED IN THE FIELD.**
3. Mission Statement – A message from the company president that demonstrates your company’s commitment to be the best-in-class in residential HVAC equipment replacement services.
4. Why Buy from You – Who are you and your company? What makes you different?
5. Your approach – The process you will be using to find the best solution for your customer.
6. Top 10% Success – Why your company must set the standards of performance in your area.
7. Your commitment – What the customer can expect before, during, and after the installation.
8. Pricing – Presented here are the flat rate prices of the systems your company offers including:
 - a. Up to four options within each of your configurations by size and efficiency.
 - b. Enhancements, Accessories, & IAQ Essentials.

9. Investment Option Worksheet – This worksheet enables you to itemize and present the recommended replacement option(s) that best meets the customer’s requirements and proves affordability.
10. Quick Job Price Guide table – This worksheet enables you to quickly include any added work where you know the total labor hours and materials cost that are required to complete. The pricing adds on at the same rates as everything else in your book according to the set-up you provide us. It is used along with the Investment Option Worksheet.
11. Rebate Pricing Companion table – This worksheet enables you to reduce the price down to your desired walkaway gross profit margin when needed, with or without financing, and without losing credibility of your published pricing. It is used along with the Investment Option Worksheet.
12. Finance Tables – These tables demonstrate what your customer’s estimated net monthly payment could be. They are used along with the Investment Option Worksheet.
13. Energy Savings tables – These tables enable you to demonstrate how much potential savings the customer can expect on their energy bills when they replace old inefficient equipment with a new and more efficient system. They are used along with the Investment Option Worksheet.
14. Company Set-up information – The set-up data that we receive will be shown on the final page to verify that your company specific data has been used throughout your price book. (For more details please see the section Filling out the “Home Comfort Set-up and Order Entry Form” on page 11.)
NOTE: THIS PAGE CONTAINS YOUR COMPANY’S CONFIDENTIAL INFORMATION AND SHOULD NOT BE PUT IN THE PRESENTATION PRICE BOOKS USED IN THE FIELD.

FILLING OUT THE “HOME COMFORT SET-UP AND ORDER ENTRY FORM”

Below are instructions for filling out the order form and a simple explanation of the final page in the book we will produce. The only items which we absolutely need from you to obtain your price book are the five items below **in bold**: 1, 2, 4, 28 & 29. You can customize any of the remaining data entry points, but if you don’t then we will either use the default industry standard shown below or determine the value based on your location. The financing rates and utility costs do not affect the prices of the systems in your book. However, they are an important part of the selling process.

Installation Labor Set-up

1. **Crew Chief Labor Rate**: Write the hourly dollar rate of your highest paid installation department Crew Chief without benefits for non-union workers. (Benefits for non-union workers are included in department overhead on Line 25. If you are a union company, then write the hourly rate paid including benefits.)
2. **Helper Labor Rate**: Write the hourly dollar rate of your highest paid installation department Helper without benefits for non-union workers. (Benefits for non-union workers are included in department overhead on Line 25. If you are a union company, then write the hourly rate paid including benefits.)
3. **Billable Labor Efficiency (Default – 60%)**: Write the percentage of effective work time of your installation team. We use industry standards and it is not necessary that you provide us this value to obtain your book. However, if known, use the total hours billed by the installers divided by the total hours paid to them.

Example: If installer is paid 40 hours per week but bills an average of only 20 hours per week to a job then that is 50% efficiency. (If your company policy is to only pay your installation team for the time, they bill to a job then this value would be 100%.)

Vehicle / Miscellaneous Set-up

4. Material Sales Tax %: This is the state sales tax rate paid by your company for the purchase of equipment and materials. Your wholesale HVAC distributor partner provides your unique equipment pricing without the sales tax added. We will add this tax percentage to the costs of all equipment, materials and supplies.
5. Average miles round trip (Default – 15): This is the round trip in miles from your shop to the customer's location, on average. This value is used together with Line 6 below to calculate the travel cost for each installation.
6. Travel Cost per Mile \$ (Default – \$0.50): This rate should combine the cost of truck depreciation per mile (as obtained from leasing companies, on average \$0.22) with the cost per mile for fuel. To calculate this: Take the dollars per gallon for fuel and divide it by your fleet's average fuel economy (typically 12 mpg). We recommended you obtain this value from your comptroller.
7. Hourly Truck Charge \$ (Default – \$6.00): This is your cost per working hour for the vehicle lease or mortgage plus maintenance costs. To calculate this: Add the annual cost of payments and maintenance, then divide this by the number of billable weeks in a year (typically 48 because of vacations and holidays), then divide this by the number of billable hours in a week (typically 24 for a 60% work efficiency factor). We recommended you obtain this value from your comptroller.
8. Risk & Proficiency & Warranty % (Default – 5.00%): Not all jobs run smoothly due to equipment or material purchase errors or failures, and not all jobs are installed proficiently depending on the competencies and work efficiencies of the Installation Crew. The average risk loss due to errors is about 2% of job costs. The average labor proficiency loss is also 2%. The equipment warranty is 1%. This adds up to a "stuff happens" total adjustment of 5% which we include in the installation price. This covers the cost of labor should there be call backs or warranty service calls within the first year. If you know your risk and proficiency adjustment percentage, please tell us.

Geothermal Well Subcontractor Set-up

If you will be offering Geothermal systems, then filling in Lines 9 to 16 below is required. Otherwise they can be left blank. (For details on what should be included in your subcontractor's service, please see the geothermal system details described in the appendix starting on page 20.)

9. 1.5 to 2.0 Ton Geothermal: Enter the subcontractor fee for loop installation.
10. 2.5 Ton Geothermal: Enter the subcontractor fee for loop installation.
11. 3.0 Ton Geothermal: Enter the subcontractor fee for loop installation.
12. 3.5 Ton Geothermal: Enter the subcontractor fee for loop installation.
13. 4.0 Ton Geothermal: Enter the subcontractor fee for loop installation.
14. 5.0 Ton Geothermal: Enter the subcontractor fee for loop installation.
15. 6.0 Ton Geothermal: Enter the subcontractor fee for loop installation.

Geothermal Electrical Subcontractor Set-up

16. Electrical Upgrades/Connect: Enter the subcontractor fee for installing electrical upgrades and power connects to the loop pump pack.

Customer Utility Rates Set-up

17. Electric Rate per KWH: Enter the local utility rate for electricity in dollars per KWH.
18. Gas Rate per THERM: Enter the local utility rate for natural gas in dollars per Therm. (If NG is not available in your area, you can leave this blank.)
19. Propane per Gallon: Enter the local price for propane in dollars per gallon. (If LP is not available in your area, you can leave this blank.)
20. Fuel Oil per Gallon: Enter the local price for fuel oil in dollars per gallon. (If fuel oil is not available in your area, you can leave this blank.)

Heating & Cooling Load Hours Set-up

21. Annual Heating Load Hours: Enter your local heating load hours (different from heating degree days). If unknown, we will use the AHRI table to look up your local load hours.
22. Annual Cooling Load Hours: Enter your local cooling load hours (different from cooling degree days). If unknown, we will use the AHRI table to look up your local load hours.

Customer Financing Interest Rates Set-up

23. Home Equity Loan Rate: Enter the average home equity loan interest rate. This can be obtained from your local bank or via an online search.
24. Local Bank Loan Rate: Enter the average standard bank loan interest rate. This can be obtained from your local bank or via an online search.

Gross Profit Margin Set-up

25. Installation Dept. Overhead % (Default – 25%): Enter the overhead percentage for benefits, insurance and direct & indirect departmental costs. To calculate this, divide hourly labor rate by overhead cost per hour. Example \$24/hr. divided by \$6 overhead equals 25%. The typical range is 20 to 30%. (Please note: If you use an installation sub-contractor then this value will be much lower, typically from 10 to 20%.)
26. Sales Commission % of Sales (Default – 8%): Enter the percent of the total gross revenue for each system sold that you will pay as commission. Enter 0% if not paying commission. If you pay your technicians a spiff for providing a lead that results in a sale, we recommended you enter 2% commission. If you compensate a selling tech who also properly books jobs per company standards, we recommend you enter 4% commission. If you have a comfort advisor, it is typical to enter from 8 to 10% commission. Keep in mind this value is part of the Gross Profit Margin. A value of 8% will raise the retail price by more than 8% to make sure you are making a decent profit even

when the sales person lowers the sales price.

27. Target Net Profit % before taxes (Default – 12%): Enter the percentage of profit you desire to achieve prior to paying company revenue taxes. The typical range is 10 to 15%.
28. Total Gross Profit Margin % (Default 45%): This will be the total of items 25 to 27 above. However instead of filling out those individual values, you may simply tell us the total gross profit margin you desire to achieve to recover overhead, pay commissions and obtain net profits before taxes. The typical range, when not using an installation sub-contractor, is 40% to 50%.

Company Information Set-up

29. Price Book Front Cover Information: Fill in the complete name, address, and phone number of your company, as you want it to appear on the cover page of your Home Comfort Certified System presentation price book. Also enter the email address where you wish to receive your completed price book; it will not be displayed anywhere in your price book.

DOWNLOADING THE *HOME COMFORT CERTIFIED SYSTEM* GUIDE:

Building Services Institute produces the Home Comfort Certified System Installation Presentation Price Book in a PDF file format. We will send the completed price book to the email address you provide through a third-party document management service. You simply click the link provided within the body of the email you receive and when a new window opens in your internet browser then download the PDF file and save it to your computer.

If you have problems opening your price book file, make sure you have a PDF document reader installed on your computer. There are many free software applications that open PDF documents. To find one, use the search engine of your choice to search for “PDF reader”. Choose the software you want to use and install it on your computer or tablet. This is your decision and done at your own risk. But to use the book we produce you must have something on your computer or tablet that can open PDF files.

Price Delivery Process

1. We deliver the price guide to your email in a PDF file format to download.
2. We then schedule a private GoToMeeting to review pricing and guide use.
3. You are provided unlimited access to online live and recorded staff user training.
4. You are provided access to printed documents for system replacement proposal agreements.
5. Once you approve you then print hard copies locally for each user plus 1 for the office.
6. We then send your matching import file for your QuickBooks or field management software.
7. We then schedule a private GoToMeeting for online staff user training.
8. You are provided unlimited price guide updates at your request and online user support.

Price Guide Updating Process

1. Forward to us upon receipt from your vendor any changes in your equipment pricing.

2. For changes in system configuration model match-ups, simply print out and mark-up a 4-option price guide page, then scan or fax it back to us.
3. For changes on the default financial set-up page, simply print out and mark-up the default page, then scan or fax it back to us.

APPENDICES

Appendix A – Selecting the Good-Better-Best-Premium system configurations

The price book is designed to present to your customer up to four grades or options for each system configuration, in the order of Good-Better-Best-Premium. We will provide you with a Microsoft Excel worksheet for you to specify your choice and costs for Good, Better, Best, and Premium system equipment. The completed worksheet can then be emailed to us at CustomerCare@growmyhvac.com.

There are 15 system configuration types in the worksheet, each with its own set-up tab(s):

1. Split Air Conditioning with Furnace
2. Split Air Conditioning with Electric Heat
3. Split Air Conditioning Add-on
4. Air Conditioning Condenser or Heat Pump Only
5. Split Heat Pump
6. Split Dual Fuel (or ‘Hybrid System’)
7. Geothermal Packaged Heat Pump
8. Geothermal Split System Heat Pump
9. Packaged AC / Gas Heat
10. Packaged AC / Electric Heat
11. Packaged Heat Pump
12. Packaged Dual Fuel
13. Furnace Only
14. Boiler Only
15. Air Handler/Fan Coil or Indoor Coil Only

For each configuration tell us “YES” you want to, or “NO” you don’t want to offer it. For the configurations you want to sell, fill in the set-up data for each system. Most contractors spend less than an hour setting up the system configurations for their price book. If you can provide us with a complete equipment price list from your distributor, then you don’t need to put the costs for every model on this set-up sheet. (For details on the materials and labor that are built into each of these configurations, please see “Appendix B – Installation costing for each system configuration” on page 16.)

Here is an example of how two companies in different climate zones might select equipment for the Split Air Conditioning with Furnace configuration.

1. Typical southern climate configuration:

- | | | | |
|------------|---------------------------|-------------------------|--------------------------|
| • Good: | 14 SEER | 80% AFUE | Non-Programmable Tstat |
| • Better: | 16 SEER | 80% AFUE | Programmable Tstat |
| • Best: | 18 SEER 2-Stage | 80% 2-Stage or 90% AFUE | Programmable Smart Tstat |
| • Premium: | 20 SEER Variable-Capacity | 90% AFUE 2-Stage | Communicating Controller |

2. Typical northern climate configuration:

- Good: 13 SEER 90% AFUE Non-Programmable Tstat
- Better: 14 SEER 95% AFUE Programmable Tstat
- Best: 16 SEER 2-Stage 95% AFUE 2-Stage Programmable Smart Tstat
- Premium: 18 SEER Variable-Capacity 95+% AFUE Modulating Communicating Controller

Below is an example of how a contractor could set up the Good-Better-Best-Premium configuration worksheets based on their preferred equipment line, geographic region, and other unique needs.

SPLIT AIR CONDITIONING WITH FURNACE								
	COIL MODEL #	WHAT YOU PAY COIL	T-STAT MODEL #	WHAT YOU PAY T-STAT	CONDENSER MODEL #	WHAT YOU PAY CONDENSER	FURNACE MODEL #	WHAT YOU PAY FURNACE
GOOD	1.5	4PXCAU24BS3HAA	TCONT402	\$ 71.74	4TTR3018H1000N	\$ 712.26	TUD1A040A9241A	\$ 739.34
	2	4PXCAU24BS3HAA	TCONT402	\$ 71.74	4TTR3024H1000N	\$ 753.95	TUD1A060A9241A	\$ 773.23
	2.5	4PXCBU30BS3HAA	TCONT402	\$ 71.74	4TTR3030G1000N	\$ 842.52	TUD1B080A9361A	\$ 832.26
	3	4PXCBU36BS3HAA	TCONT402	\$ 71.74	4TTR3036G1000N	\$ 947.44	TUD1B080A9361A	\$ 832.26
	3.5	4PXCCU42BS3HAA	TCONT402	\$ 71.74	4TTR3042D1000N	\$ 1,044.24	TUD1C100A9481A	\$ 881.98
	4	4PXCDCU48BS3HAA	TCONT402	\$ 71.74	4TTR3048D1000N	\$ 1,144.18	TUD1D120A9601A	\$ 933.12
5	4PXCDCU60BS3HAA	TCONT402	\$ 71.74	4TTR3060D1000N	\$ 1,340.40	TUD1D140A9601A	\$ 976.19	
BETTER	1.5	4PXCAU24BS3HAA	TCONT624	\$ 135.37	4TTR6018J1000A	\$ 1,130.03	TUD2A040A9242A	\$ 929.59
	2	4PXCAU24BS3HAA	TCONT624	\$ 135.37	4TTR6024J1000A	\$ 1,146.48	TUD2A060A9362A	\$ 963.58
	2.5	4PXCBU30BS3HAA	TCONT624	\$ 135.37	4TTR6030J1000A	\$ 1,283.21	TUD2B080A9362A	\$ 1,067.74
	3	4PXCBU36BS3HAA	TCONT624	\$ 135.37	4TTR6036J1000A	\$ 1,448.63	TUD2B080A9362A	\$ 1,067.74
	3.5	4PXCCU42BS3HAA	TCONT624	\$ 135.37	4TTR6042J1000A	\$ 1,624.62	TUD2C100A9482A	\$ 1,077.34
	4	4PXCCU48BS3HAA	TCONT624	\$ 135.37	4TTR6048J1000A	\$ 1,762.50	TUD2C120A9542A	\$ 1,114.02
5	4PXCDCU60BS3HAA	TCONT624	\$ 135.37	4TTR6060J1000A	\$ 1,866.67	TUD2D140A9602A	\$ 1,167.95	
BEST	1.5							
	2	4TXCA002DS3HCAA	TCONT824	\$ 223.61	4TTR8024A1000A	\$ 2,169.08	TUD2B060A9V3VB	\$ 1,225.00
	2.5							
	3	4TXCB004DS3HCAA	TCONT824	\$ 223.61	4TTR8036A1000A	\$ 2,430.64	TUD2B080A9V3VB	\$ 1,265.28
	3.5							
	4	4TXCC007DS3HCAA	TCONT824	\$ 223.61	4TTR8048A1000A	\$ 2,761.56	TUD2C100A9V5VB	\$ 1,468.62
5	4TXCD010DS3HCAA	TCONT824	\$ 223.61	4TTR8060A1000A	\$ 3,072.25	TUD2D140A9V5VB	\$ 1,538.46	
PREMIUM	1.5							
	2	4TXCB003DS3HCAA	TZONE950AC52ZA	\$ 376.22	4TTV0024A1000A	\$ 3,580.95	TUD2B080ACV32A	\$ 1,497.28
	2.5							
	3	4TXCB004DS3HCAA	TZONE950AC52ZA	\$ 376.22	4TTV0036B1000A	\$ 4,430.91	TUD2B080ACV32A	\$ 1,497.28
	3.5							
	4	4TXCD008DS3HCAA	TZONE950AC52ZA	\$ 376.22	4TTV0048A1000A	\$ 4,039.39	TUD2D120ACV52A	\$ 2,123.76
5	4TXCD010DS3HCAA	TZONE950AC52ZA	\$ 376.22	4TTV0060A1000A	\$ 4,398.47	TUD2D140ACV52A	\$ 2,140.26	

Appendix B – Installation costing for each system configuration

The presentation price for each configuration is calculated using COGS (cost of goods sold) based on four components (or six for geothermal systems) as shown below. We use industry standard installation hours, but if you wish you can adjust these hours for your price book. To do so simply print out the appropriate page(s) from the sections below and write the actual crew-hours you want us to use next to the tasks you need to have changed. Then fax these marked up pages to us at [603-386-6342](tel:603-386-6342).

If you would like to see the current industry standard costs we use for miscellaneous supplies and tasks used for installations (and listed in point #2 for each configuration below), please send your request to CustomerCare@growmyhvac.com with subject line to read: *"Please send current miscellaneous installation materials and supplies costs."*

SPLIT AIR CONDITIONING WITH FURNACE

(Note: Some possible options in this configuration are systems with 80% furnaces, another section for 90%, or mixing them in one section, and having a section with fuel oil burning furnaces.)

1. Your cost for the equipment (Evaporator, Thermostat, Condenser, Furnace), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies
 - a. New equipment mounting pad, leveled
 - b. New condensate drain line
 - c. New electrical disconnect
 - d. New power wire, disconnect to equipment
 - e. New PVC venting (only for 90%+ furnaces) up to 30ft
 - f. New valve & fittings to connect to gas line
 - g. New transitions to existing plenums
 - h. New refrigerant line-set up to 30ft
 - i. Refrigerant recovery
 - j. Gases for soldering and pressure testing
 - k. Various copper fittings
 - l. Vacuum pump usage & maintenance
 - m. Refrigerant to top off the system
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Outdoor Unit 1-4 hours (*1.5 to 3.5 ton: 1 hour; 4 & 5 ton: 4 hours*)
 - c. Set Evaporator Coil 2 hours
 - d. Set Furnace, install Tstat 3.5 hours
 - e. Install and connect line-set 1.5 hours
 - f. Start-up, Test and Verify 1 hour
 - g. TOTAL CREW-HOURS 10 - 13 hours (*plus 2 hours for venting of 90%+ furnaces*)
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

SPLIT AIR CONDITIONING WITH ELECTRIC HEAT

(Note: An option in this configuration is a system without an electric heat kit installed. In this case the section will read "Split Air Conditioning with Fan Coil".)

1. Your cost for the equipment (Fan Coil, Thermostat, Condenser, optional Electric Heat Kit), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - n. New equipment mounting pad, leveled
 - o. New condensate drain line
 - p. New electrical disconnect
 - q. New power wire, disconnect to equipment
 - r. New transitions to existing plenums
 - s. New refrigerant line-set up to 30ft
 - t. Refrigerant recovery
 - u. Gases for soldering and pressure testing
 - v. Various copper fittings
 - w. Vacuum pump usage & maintenance
 - x. Refrigerant to top off the system

3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Outdoor Unit 1-4 hours (*1.5 to 3.5 ton: 1 hour; 4 & 5 ton: 4 hours*)
 - c. Set Fan Coil, install Tstat 1.5 hours
 - d. Install and connect line-set 1.5 hours
 - e. Start-up, Test and Verify 1 hour
 - f. TOTAL CREW-HOURS 6 - 9 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

SPLIT AIR CONDITIONING ADD-ON

1. Your cost for the equipment (Evaporator Coil, Thermostat, Condenser), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:

a. New equipment mounting pad, leveled	f. Refrigerant recovery
b. New condensate drain line	g. Gases for soldering and pressure testing
c. New electrical disconnect	h. Various copper fittings
d. New power wire, disconnect to equipment	i. Vacuum pump usage & maintenance
e. New refrigerant line-set up to 30ft	j. Refrigerant to top off the system
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Outdoor Unit 1-4 hours (*1.5 to 3.5 ton: 1 hour; 4 & 5 ton: 4 hours*)
 - c. Set Evap Coil, install Tstat 1 hour
 - d. Install and connect line-set 1.5 hours
 - e. Start-up, Test and Verify 1 hour
 - f. TOTAL CREW-HOURS 5.5 - 8.5 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

AIR CONDITIONING CONDENSER OR HEAT PUMP ONLY

1. Your cost for the equipment (Thermostat, Condenser or Heat Pump), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:

a. New equipment mounting pad, leveled	d. New power wire, disconnect to equipment
b. New snow riser pump-ups (for HPs)	e. Refrigerant recovery
c. New electrical disconnect	f. Soldering and pressure testing gases

- g. Various copper fittings
 - h. Vacuum pump usage & maintenance
 - i. Refrigerant to top off the system (or charge the system if it is a dry-charged unit).
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
- a. Remove old equipment 1 hour
 - b. Set Outdoor Unit 2-4 hours (*1.5 to 3.5 ton: 2 hours; 4 & 5 ton: 4 hours*)
 - c. Install Tstat 0.5 hours
 - d. Start-up, Test and Verify 1 hour
 - e. TOTAL CREW-HOURS 4.5 - 6.5 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

SPLIT HEAT PUMP

(Note: An option in this configuration is to use an indoor coil instead of a fan coil. This is useful as an add-on or partial system change-out if you install Split Dual Fuel or Hybrid systems.)

1. Your cost for the equipment (Fan Coil or Indoor Coil, Thermostat, Heat Pump, Electric Heat Kit), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New equipment mounting pad, leveled
 - b. New snow riser pump-ups
 - c. New condensate drain line
 - d. New electrical disconnect
 - e. New power wire, disconnect to equipment
 - f. New transitions to existing plenums
 - g. New refrigerant line-set up to 30ft
 - h. Refrigerant recovery
 - i. Gases for soldering and pressure testing
 - j. Various copper fittings
 - k. Vacuum pump usage & maintenance
 - l. Refrigerant to top off the system
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Heat Pump Unit 1-4 hours (*1.5 to 3.5 ton: 1 hour; 4 & 5 ton: 4 hours*)
 - c. Set Fan Coil, Install Tstat 1.5 hours (*or 1 hour for Indoor Coil and Tstat*)
 - d. Install and connect line-set 1.5 hours
 - e. Start-up, Test and Verify 1 hour
 - f. TOTAL CREW-HOURS 6 - 9 hours (*or 5.5 – 8.5 hours for Indoor Coil*)
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

SPLIT DUAL FUEL (OR 'HYBRID SYSTEM')

(Note: Some possible options in this configuration are systems with 80% furnaces, another section for 90%, or mixing them in one section, and having a section with fuel oil burning furnaces.)

1. Your cost for the equipment (Indoor Coil, Thermostat, Heat Pump, Furnace), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New equipment mounting pad, leveled
 - b. New snow riser pump-ups
 - c. New condensate drain line
 - d. New electrical disconnect
 - e. New power wire, disconnect to equipment
 - f. New PVC venting (only for 90%+ furnaces) up to 30ft
 - g. New valve & fittings to connect to gas line
 - h. New transitions to existing plenums
 - i. New refrigerant line-set up to 30ft
 - j. Refrigerant recovery
 - k. Gases for soldering and pressure testing
 - l. Various copper fittings
 - m. Vacuum pump usage & maintenance
 - n. Refrigerant to top off the system
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):

a. Remove old equipment	1 hour
b. Set Heat Pump Unit	2-4 hours (<i>1.5 to 3.5 ton: 2 hours; 4 & 5 ton: 4 hours</i>)
c. Set Indoor Coil	2 hours
d. Set Furnace, install Tstat	4.5 hours
e. Install and connect line-set	1.5 hours
f. <u>Start-up, Test and Verify</u>	<u>1 hour</u>
g. TOTAL CREW-HOURS	12 - 14 hours (<i>plus 2 hours for venting of 90%+ furnaces</i>)
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

GEOHERMAL PACKAGED HEAT PUMP

1. Your cost for the equipment (Thermostat, Geothermal Packaged Heat Pump, Loop Pump Pack), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New equipment mounting pad, leveled
 - b. New condensate drain line
 - c. New electrical disconnect
 - d. New power wire, disconnect to equipment
 - e. New transitions to existing plenums
 - f. Various water line fittings
 - g. Refrigerant recovery
3. The well subcontractor fee, as entered by you on Lines 9 to 15 of the *Home Comfort Order Entry and Set-up Form*, for installing the well loop which should include:
 - o Drilling or trenching for the well

- Installing water loop
 - Filling water loop with environmentally friendly antifreeze/water solution
 - Connecting water loop to pump pack
 - Backfilling the trench
 - 1-year warranty minimum for water loop problems
4. The electrical subcontractor fee, as entered by you on Line 16 of the *Home Comfort Order Entry and Set-up Form*, for installing power lines and low-voltage wiring to the loop pump pack.
 5. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):

a. Remove old equipment	2 hours
b. Seal well loop wall penetration	1 hour
c. Set Geo Unit, install Tstat	5-7 hours (<i>1.5 to 3.5 ton: 4 hours; 4 to 6 ton: 6 hours</i>)
d. Tie Geo Unit to loop pump pack	1 hour
e. Tie Geo Unit to hot water supply	1 hour
f. <u>Start-up, Test and Verify</u>	<u>2 hours</u>
g. TOTAL CREW-HOURS	12 - 14 hours
 6. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

GEOTHERMAL SPLIT SYSTEM HEAT PUMP

(Note: Options in this configuration include having a section for Geothermal Split Dual Fuel or Hybrid systems, or a Geothermal Split Heat Pump with Indoor coil for add-on or replacement on a Dual Fuel.)

1. Your cost for the equipment (Indoor Coil/Furnace/Air Handler & optional Heat Kit, Thermostat, Geothermal Heat Pump, Loop Pump Pack), the cost of the optional extended labor warranty coverage as provided by your distributor, and your installation sub-contractor's fee, if applicable.
2. Industry standard costs for the following materials and supplies:

a. New equipment mounting pad, leveled	h. New refrigerant line-set up to 30ft
b. New condensate drain line	i. Refrigerant recovery
c. New electrical disconnect	j. Gases for soldering and pressure testing
d. New power wire, disconnect to equipment	k. Various water line fittings
e. New transitions to existing plenums	l. Various copper fittings
f. New valve & fittings to connect to gas line	m. Vacuum pump usage & maintenance
g. New PVC venting (only for 90%+ furnaces) up to 30ft	n. Refrigerant to top off the system
3. The well subcontractor fee, as entered by you on Lines 9 to 15 of the *Home Comfort Order Entry and Set-up Form*, for installing the well loop which should include:
 - Drilling or trenching for the well
 - Installing water loop
 - Filling water loop with environmentally friendly antifreeze/water solution
 - Connecting water loop to pump pack

- Backfilling the trench
 - 1-year warranty minimum for water loop problems
4. The electrical subcontractor fee for installing power lines and low-voltage wiring to the loop pump pack, as entered by you on Line 16 of the *Home Comfort Order Entry and Set-up Form*.
 5. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):

a. Remove old equipment	2 hours
b. Seal well loop wall penetration	1 hour
c. Set Geo Unit, install Tstat	3-5 hours (<i>1.5 to 3.5 ton: 3 hours; 4 to 6 ton: 5 hours</i>)
d. Set Indoor Unit	3 hours (<i>plus 4 hours if installing Furnace</i>)
e. Install and connect line-set	1.5 hours
f. Tie Geo Unit to loop pump pack	1 hour
g. Tie Geo Unit to hot water supply	1 hour
h. <u>Start-up, Test and Verify</u>	2 hours
i. TOTAL CREW-HOURS	14.5 - 16.5 hours (<i>or 18.5 – 20.5 if installing Furnace</i>) <i>(plus 2 hours for venting of 90%+ furnaces)</i>
 6. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

PACKAGED AC / GAS HEAT

1. Your cost for the equipment (Thermostat, Packaged Unit), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.
2. Industry standard costs for the following materials and supplies:

a. New equipment mounting pad, leveled	d. New valve & fittings to connect to gas line
b. New electrical disconnect	e. New transitions to existing plenums
c. New power wire, disconnect to equipment	f. Refrigerant recovery
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):

a. Remove old equipment	1 hour
b. Set Package Unit	3.5-5.5 hours (<i>1.5 to 3.5 ton: 3.5 hours; 4 & 5 ton: 5.5 hours</i>)
c. Install Tstat	0.5 hours
d. <u>Start-up, Test and Verify</u>	1 hour
e. TOTAL CREW-HOURS	6 - 8 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

PACKAGED AC / ELECTRIC HEAT

1. Your cost for the equipment (Thermostat, Packaged Unit, optional Electric Heat Kit), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.

2. Industry standard costs for the following materials and supplies:
 - a. New equipment mounting pad, leveled
 - b. New electrical disconnect
 - c. New power wire, disconnect to equipment
 - d. New transitions to existing plenums
 - e. Refrigerant recovery
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Package Unit 3.5-5.5 hours (*1.5 to 3.5 ton: 3.5 hours; 4 & 5 ton: 5.5 hours*)
 - c. Install Tstat 0.5 hours
 - d. Start-up, Test and Verify 1 hour
 - e. TOTAL CREW-HOURS 6 - 8 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

PACKAGED HEAT PUMP

1. Your cost for the equipment (Thermostat, Packaged Unit, Electric Heat Kit), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New equipment mounting pad, leveled
 - b. New electrical disconnect
 - c. New power wire, disconnect to equipment
 - d. New transitions to existing plenums
 - e. Refrigerant recovery
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Package Unit 3.5-5.5 hours (*1.5 to 3.5 ton: 3.5 hours; 4 & 5 ton: 5.5 hours*)
 - c. Install Tstat 0.5 hours
 - d. Start-up, Test and Verify 1 hour
 - e. TOTAL CREW-HOURS 6 - 8 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

PACKAGED DUAL FUEL

1. Your cost for the equipment (Thermostat, Package Unit), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New equipment mounting pad, leveled
 - b. New electrical disconnect
 - c. New power wire, disconnect to equipment
 - d. New valve & fittings to connect to gas line
 - e. New transitions to existing plenums
 - f. Refrigerant recovery

3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Package Unit 3.5-5.5 hours (*1.5 to 3.5 ton: 3.5 hours; 4 & 5 ton: 5.5 hours*)
 - c. Install Tstat 0.5 hours
 - d. Start-up, Test and Verify 1 hour
 - e. TOTAL CREW-HOURS 6 - 8 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

FURNACE ONLY

(Note: Options in this configuration include having a section for systems with 80% Furnaces, another section for 90%, or mixing them in one section, and having a section with Fuel Oil burning Furnaces.)

1. Your cost for the equipment (Thermostat, Furnace), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New electrical disconnect
 - b. New power wire, disconnect to equipment
 - c. New PVC venting (only for 90%+ furnaces) up to 30ft
 - d. New valve & fittings to connect to gas line
 - e. New transitions to existing plenums
 - f. New transitions to existing vent piping
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Furnace, install Tstat 4 hours
 - c. Start-up, Test and Verify 1 hour
 - d. TOTAL CREW-HOURS 6 hours (*plus 2 hours for venting of 90%+ furnaces*)
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

BOILER ONLY

(Note: Options in this configuration include having separate sections for Gas-Water Boilers, Gas-Steam Boilers, Oil-Water Boilers, and/or Oil-Steam Boilers.)

1. Your cost for the equipment (Thermostat-optional, Boiler), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New electrical disconnect
 - b. New power wire, disconnect to equipment
 - c. New PVC venting (only for 90%+ boilers) up to 30ft
 - d. New valve & fittings to connect to fuel line
 - e. New water fill and backflow preventer
 - f. New expansion tank and air separator
 - g. Various fittings to connect to existing hydronic system
 - h. New transitions to existing vent piping

3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set and connect Boiler 6 hours
 - c. Start-up, Test and Verify 1 hour
 - d. TOTAL CREW-HOURS 8 hours (*plus an additional 2 hours for 90%+ boilers*)
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

AIR HANDLER/FAN COIL OR INDOOR COIL ONLY

(Note: Options in this configuration include having a section for systems with 80% Furnaces, another section for 90%, or mixing them in one section, and having a section with Fuel Oil burning Furnaces.)

1. Your costs for the equipment (Air Handler or Fan Coil or Indoor Coil), and for optional extended labor warranty coverage as provided by your distributor. Also, your installation sub-contractor fee, if applicable.
2. Industry standard costs for the following materials and supplies:
 - a. New electrical disconnect
 - b. New power wire, disconnect to equipment
 - c. New PVC venting (only for 90%+ furnaces) up to 30ft
 - d. New valve & fittings to connect to gas line
 - e. New transitions to existing plenums
 - f. New transitions to existing vent piping
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your BLE factor (*unless you are using an installation sub-contractor*):
 - a. Remove old equipment 1 hour
 - b. Set Furnace, install Tstat 3 hours
 - c. Start-up, Test and Verify 0.5 hours
 - d. TOTAL CREW-HOURS 4.5 hours
4. Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*.

Appendix C – Enhancements, Accessories & IAQ Essentials

In addition to offering HVAC system installations, your price book can also present system enhancements to offer to your customer. The following is a brief description of the eight accessories that your price book is ready to display with just a little information from you. For each of the following items we need you to tell us which unit you want to offer (brand & model number) and your cost. The presentation prices will include Material state sales tax, Vehicle costs and the Risk, proficiency, and warranty percentage as entered by you on Lines 4 to 8 of the *Home Comfort Order Entry and Set-up Form*. The crew-hours shown can be adjusted at your request.

1. Touchscreen Programmable Thermostat – The presentation price includes installation time of 0.5 crew-hours and materials for wiring.

2. HEPA Air Cleaner System – The presentation price includes installation time of 3.5 crew-hours and materials of wiring, flex-ducting and/or sheet metal.
3. Whole-House Air Cleaner System – The presentation price includes installation time of 2.5 crew-hours and materials of wiring and sheet metal.
4. Ultraviolet Air Purifier System – The presentation price includes installation time of 2 crew-hours and materials for wiring.
5. Energy (or Heat) Recovery Ventilator – The presentation price includes installation time of 3.5 crew-hours and materials of wiring, flex-ducting and/or sheet metal.
6. Fan Powered Humidifier – The presentation price includes installation time of 1.5 crew-hours and materials of wiring, and piping & fittings for water supply & drain.
7. Bypass Humidifier – The presentation price includes installation time of 1.5 crew-hours and materials of wiring, flex-ducting and/or sheet metal, and piping & fittings for water supply & drain.
8. High-Efficiency Media Air Cleaner – The presentation price includes installation time of 1 crew-hour and materials of sheet metal.

In addition to these eight items, we can include up to 10 additional accessories in your price book. These are typically additional sizes of an item above (e.g. 100cfm ERV, 200cfm ERV, 300cfm ERV). If you want to offer an item that is not mentioned above, then please provide the following information for each additional accessory that you want in your price book:

- Brand and model number of the item
- Your cost for the item
- The total cost of miscellaneous materials needed to install the item
- The total crew-hours to install the item and verify proper operation.

Appendix D – Data table for upload to dispatching and/or accounting software

In addition to the PDF version of your book, you can also receive a spreadsheet in CSV (comma separated variables) format containing essential data from your book that can be uploaded into most dispatching and accounting software. For further details on how to obtain this optional feature that we offer please contact us at CustomerCare@growmyhvac.com. Here is an explanation of the data contained in each of the eleven columns of this optional spreadsheet:

1. **Category:** The brand of equipment used in your book and “HVAC Installation”.
Example: Trane HVAC Installation
2. **Sub-category:** The configuration type of the system which is also the page heading.
Example: Split Heat Pump With Fan Coil
3. **Code:** A 14-digit code that will be unique for each installation in your price book.
Example: H051-GD35-0975 (Note: the last four digits represent the crew-labor hours. The first two digits are hours and the last two digits are fractions of hours, so “0975” means 9 hours and 45 minutes (1 hr x 0.75 = 45 mins). In the case of some line-items on the Investment Option Worksheet the hours may be negative and the last four digits will begin with “N”. If the code is “HIOW-0024-N125”, the hours are negative 1 hour and 15 minutes (1 hr x 0.25 = 15 mins).

4. **Description:** The page heading and whether the system is “Good”, “Better”, “Best” or “Premium” and the nominal size of the system.
Example: Split Heat Pump with Fan Coil Good System 3.5 Ton Size
5. **Retail_ \$:** The presentation price (or “sell price”) in dollars for the system installation as shown to your customers in the PDF version of the book.
Example: 7104
6. **Eqp/Mtl/Sub_ \$:** The cost in dollars for equipment, miscellaneous materials, and subcontractors.
Example: 3059.61
7. **Sales_Tax_ \$:** The total in dollars for sales tax on equipment and materials, based on what you put on Line 4 of the *Home Comfort Set-up and Order Entry Form*.
Example: 214.17
8. **Labor_Hrs:** The number of crew-hours for the installation, based on what you put on Line 3 of the *Home Comfort Set-up and Order Entry Form*, and the crew-hours shown in “Appendix B – Installation costing for each system configuration” starting on page 16.
Example: 9.17
9. **Labor_Cost_ \$:** The cost in dollars for labor for the installation, based on what you put on Lines 1, 2, and 3 of the *Home Comfort Set-up and Order Entry Form*.
Example: 385.14
10. **Risk_Prof_ \$:** The portion of the installation price in dollars assigned to Risk & Proficiency & Warranty, based on what you put on Line 8 of the *Home Comfort Set-up and Order Entry Form*.
Example: 149.97
11. **Gross_Profit_ \$:** The portion of the installation price in dollars that is gross profit, based on what you put on Lines 25 to 28 of the *Home Comfort Set-up and Order Entry Form*.
Example: 3190.31

Appendix E – Determining your job costs from the presentation price

Find the *Total System Installation Costs, or Cost of Goods Sold (COGS)*.

To calculate: Multiply the presentation price by 1 minus your Total Gross Profit Margin percentage.

$$\text{COGS} = \text{PRICE} \times (1 - \text{TGPM})$$

Example:

- Replacement Price = \$10,000
- TGPM = 45%
- COGS = \$10,000 x (1 - 0.45) = \$5,500