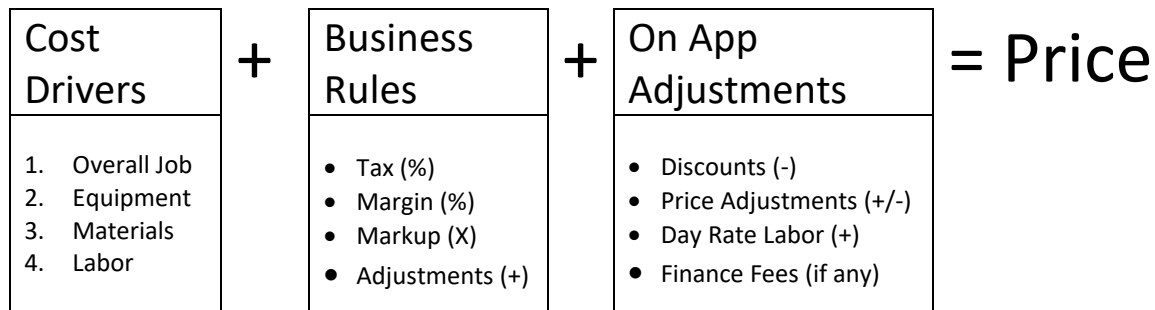


Install Manager Pro for Unitary Equipment and Boilers



Overall Job Costs

Example: Permit

Equipment

Example: Air Conditioner (Compressor or ODU)

Materials

1. Materials List

- Pick and choose items to make a list.
- Tedious, time-consuming, and error prone.
- Very low value-add.

2. Standard Cost

- Good for average jobs.
- Can be high or low for any one job.
- Too High – Price yourself out of a job.
- Too Low – Win an unprofitable a job.

3. Install Manager Pro

- Automate the routine task of creating a bill-of-materials with labor
- Estimates the risk that a job will run over.

How Install Manager Pro Works:

Materials: Specific materials (items) are organized into categories.

An Install Kit (of materials) is assigned to each type of equipment. Materials are organized into categories. Install Kit consists of as many Categories

A “top-down” look at the structure:

- **Equipment Type** (like an AC or Furnace)
 - **Install Kit** (one for each type)
 - **Categories** (as many as needed)
 - **Items** (specific material)

Install Manager Pro for Unitary Equipment and Boilers

Item

An **Item** may belong to one or more **Install Kits**. You don't have to over-think this, we recommend you add an Item called **Supplies** for non-inventoried items such as fasteners, tie wraps, and duct tape. For major items, like a lineset, we recommend you price this carefully (either in pre-cut lengths or by the foot) as it is a major cost driver.

Your time investment in itemizing these kits is the “gift that keeps on giving” – you get a more accurate cost, labor, risk estimate, and price on every new proposal. You'll get an actionable, itemized bill-of-materials, labor analysis (hours and days), and overall risk estimate for every win.

Install Kits are organized by **Categories** which have one of the following properties:

- **Mandatory.** On the app, the Comfort Consultant must select one item from this category – so, take care when marking an item mandatory. Mandatory items can't be removed from the proposal.
 - **Example:** Supplies is an example of a “mandatory item” – although some contractors prefer to account for this cost in overhead.
- **Recommended.** On the app, these items are automatically added to the proposal. The Comfort Consultant may de-select a recommended items when it's not needed.
 - **Example:** An outdoor pad when you plan on reusing an existing pad.
 - **Best Practice:** Comfort Consultants should add a note for the install manager and crew – just touch the blue “i” note icon.
- **Optional.** On the app, the Comfort Consultant selects Optional items when needed.
 - **Best Practice:** When in doubt between Recommended and Optional make the item Recommend – it is often easier for the Comfort Consultant to deselect items than try and remember everything during the time-crunch of today's fast paced selling environment.

Install Manager Pro for Unitary Equipment and Boilers

Add Item

To add an item to Install Manager you'll need to know five things:

1. Part Numbers
2. Description
3. Cost & Quantity
4. Extra Labor & Risk
5. Display Location

Note: The price associated with install items is added to the equipment price.

1. Part Numbers – back-office view

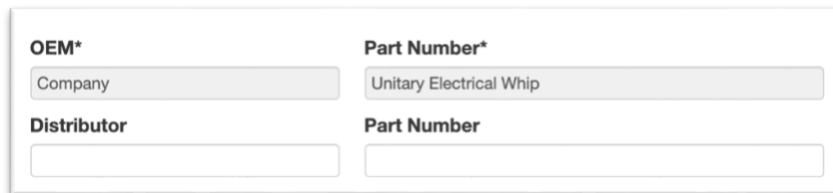
To add an item to an existing category, you can use specific OEM and Distributor part numbers as shown in Figure 1.



OEM*	Part Number*
<input type="text"/>	<input type="text"/>
Distributor	Part Number
<input type="text"/>	<input type="text"/>

Figure 1 Add Item - Part Numbers. Note the * indicates a required field.

You may also use generic, universal, or company part numbers as shown in Figure 2.



OEM*	Part Number*
Company	Unitary Electrical Whip
Distributor	Part Number
<input type="text"/>	<input type="text"/>

Figure 2 Use of company part numbers.

2. Description

On the app, what you show to the Comfort Consultant (the **Shown to Company** field of Figure 3) should be easy to recognize. You can show something else to the Customer (the **Shown to Customer** field) or leave the field blank to hide the item on the proposal. The checkbox makes these two fields identical. It does the work of copying the Shown to Company to Shown to Customer. You may also (optionally) enter a Description for Admins - think of this as a Yellow Post-It-Note.



Shown to Company*	<input type="text"/>
Shown to Customer ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Same	
Description for Admins	<input type="text"/>

Figure 3 Describing install items.

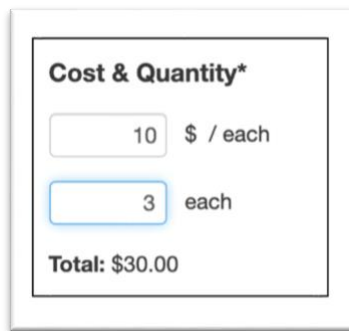
3. Cost & Quantity

Items default to "1 each" but you can enter unit cost and number of items and the software will do the math for you.

Install Manager Pro for Unitary Equipment and Boilers

Note: The cost is converted to a price using you Business Rule for pricing the equipment type.

Example: The \$30.00 item in Figure 4, with 50% margin adds \$60.00 to the price of the equipment.



Cost & Quantity*

\$ / each

each

Total: \$30.00

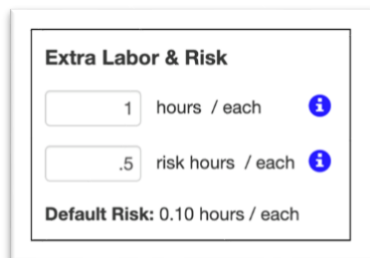
Figure 4 Cost & Quantity.

4. Extra Labor & Risk

Since each Equipment Type usually has **Standard Labor hours**, you'll only enter **Extra Labor** to install materials when it is over or above your standard. Extra labor hours are added to the standard labor. The cost for this labor is added to the item cost using the labor rate in your pricing rules.

Note: You need a Business Rule for labor in \$/Hour to price extra labor.

Example: If your labor rate is \$100/Hour and your margin is 50% an extra 1 hour of labor prices out to \$200.



Extra Labor & Risk

hours / each ⓘ

risk hours / each ⓘ

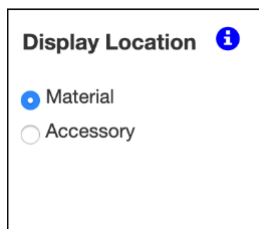
Default Risk: 0.10 hours / each

Figure 5 Extra Labor & Risk.

5. Display Location

If shown to the customer, show as a material or accessory.

The default location is in the Materials section of the customer proposal.



Display Location ⓘ

☒ Material

☐ Accessory

Figure 6 Display Location..

Install Manager Pro for Unitary Equipment and Boilers

1. Overall Job Costs

Example

Overall Job Costs

Available for beta-test on iPad now. Android coming soon.

Category	Shown to Company (Must be Unique)	Shown to Customer	Unit(s)	Cost (\$)	Qty	Tax	Pricing Method	Percent	Use	Hours Each	Risk (Hrs) Each	Sequence	
Permit	HVAC	HVAC Permit	each	\$ 75.00	1	<input type="checkbox"/>	Gross Margin	50 %	Recommended	0		1	✕
Permit	Gas	Gas Permit	each	\$ 125.00	1	<input type="checkbox"/>	Markup	25 %	Optional	0		2	✕
Permit	Electric	Electric Permit	each	\$ 85.00	1	<input type="checkbox"/>	Markup	25 %	Optional	0		3	✕
Extra Labor	Crew of 2		hours	\$ 60.00	1	<input type="checkbox"/>	Gross Margin	50 %	Optional	1		4	✕
Travel	West Side (+15 mins)		each	\$ 50.00	1	<input type="checkbox"/>	Gross Margin	0 %	Optional	0.25	.25	5	✕
Travel	South of 270 (+45 mins)		each	\$ 75.00	1	<input type="checkbox"/>	Gross Margin	0 %	Optional	1	.25	6	✕

Create a new Cost Category:

- Click the **Add** Icon 

Edit an existing Category:

- **Edit.** Click on a field (as shown above) for in-line edits.
- **Save.** Edits are saved but not yet published.
- Click **Preview Pricing** and **Publish.** Activate your changes (6 rollbacks are saved).
- **Tablet.** To use your changes immediately, touch **Refresh Data.**

Delete a Cost Category:

- Click the **Delete** Icon 

Install Manager Pro for Unitary Equipment and Boilers

2. Equipment

Navigation

3. Materials

Navigation

Manage Install Kits
Company: Johns HVAC IMP 100819
Kit:

✓ Select

Air Handler

Boiler

Coil

Gas Furnace (80%)

Gas Furnace (90%+)

ME IDU

ME ODU

ME Smart Items

ODU

Packaged Unit

+ Create New

Import

Export (.xlsx)

View & Delete Items

Connect Install Kits

Manage Install Kits
Company: Johns HVAC IMP 100819
Kit:

ODU

+ Create New

Show Connected Install Kits | Connect Install Kits

Import








Export (.xlsx)

View & Delete Items

Last Update: 11/5/2019 03:35:00 PM by John Steidley

Changes go live automatically.

Category

Lineset (Pre-Cut)				Recommended
Active		Inactive		
Name	Cost	Name	Cost	
 Flush Existing Lineset	129.00			
 Lineset (Pre-Cut 010 ft.)	50.00			
 Lineset (Pre-Cut 015 ft.)	75.00			
 Lineset (Pre-Cut 030 ft.)	150.00			
 Lineset (Pre-Cut 050 ft.)	250.00			
 Lineset (Pre-Cut 065 ft.)	275.00			
 Lineset (Pre-Cut 100 ft.)	395.00			
<div>+ </div>				


Install Manager Pro for Unitary Equipment and Boilers

4. Labor

Install Kits

Manage Labor Options


Company: Johns HVAC IMP 100819

Options: Gas Furnace (90%+)  [+ Create New](#)




Last Update: 10/30/2019 03:57:49 PM by June Getzinger


[Show Connected Labor Options](#) | [Connect Labor Options](#)

[Import](#) [Export \(.xlsx\)](#) [View & Delete Labor](#)

 **Changes go live automatically.**

Labor \$/Hour

Active			Inactive		
Name	Hours	Risk	Name	Hours	Risk
 90% GF Attic Install	5.00	1.00			
 90% GF Basement Install	4.00	1.00			
 90% GF Closet Install	6.00	1.00			



Install Manager Pro for Unitary Equipment and Boilers

Although there are 9 possible Install Kits – we only recommend 5 for Unitary and Boilers

Equipment Types	Default Install Kit	Comments
1. Air Conditioner	ODU	Shared
2. Air Handler	Air Handler	
3. Boiler	Boiler	
4. Coil		Not required
5. Electric Heater		Not required
6. Gas Furnace	Gas Furnace (80%)	
7. Gas Furnace 90%+	Gas Furnace (90%+)	
8. Heat Pump	ODU	Shared
9. Packaged Unit	ODU	Shared

Example

Costs

Install Kit ✖

☒ Taxable

OEM	Type	Sub-Type	AFUE	Cost (\$)	Kit	
Default	Air Conditioner			\$ 25.00	ODU	✖
Default	Air Handler			\$ 25.00	Air Handler	✖
Default	Boiler			\$ 25.00	Boiler	✖
Default	Gas Furnace			\$ 25.00	Gas Furnace (80%)	✖
Default	Gas Furnace		90%+	\$ 25.00	Gas Furnace (90%+)	✖

ODU Install Kit

Mandatory
Recommend
Optional

Furnace
ABC example

Install Manager Pro for Unitary Equipment and Boilers

Appendix A: Navigation – Management Portal, Business Rules

Best Practice: Bookmark this page for instant access

The screenshot displays the Management Portal interface. At the top, the 'Management Portal' header includes the company name 'Your Company Name' and links to 'Help Center' and 'Contact'. Below this, four main sections are visible: 'Setup Status' (with a 'View' button), 'Usage and Scheduling' (with 'View' and 'Schedule' buttons), 'Documents' (with a 'View & Submit' button), and 'Pricing' (with a 'Manage' button highlighted by a red box and a red arrow pointing to the Business Rules section below). The 'Pricing' section also includes 'Export (xlsx)' and 'Export (csv)' buttons. The 'Business Rules' section below features a 'Company: Your Company Name' dropdown, an 'Action: Edit Business Rules' dropdown with a 'Go' button, and a 'Last Update: 11/04/19 9:32:46 AM' timestamp. A checkbox for 'Show last update on each row' is also present. A dashed red line separates the two sections.