

App Training 2

App Training 2 Topics

Schedule a Job(Sales Call)

Open a form(Site Survey)

Adjustments to pricing

Customize quote PDF for your customer

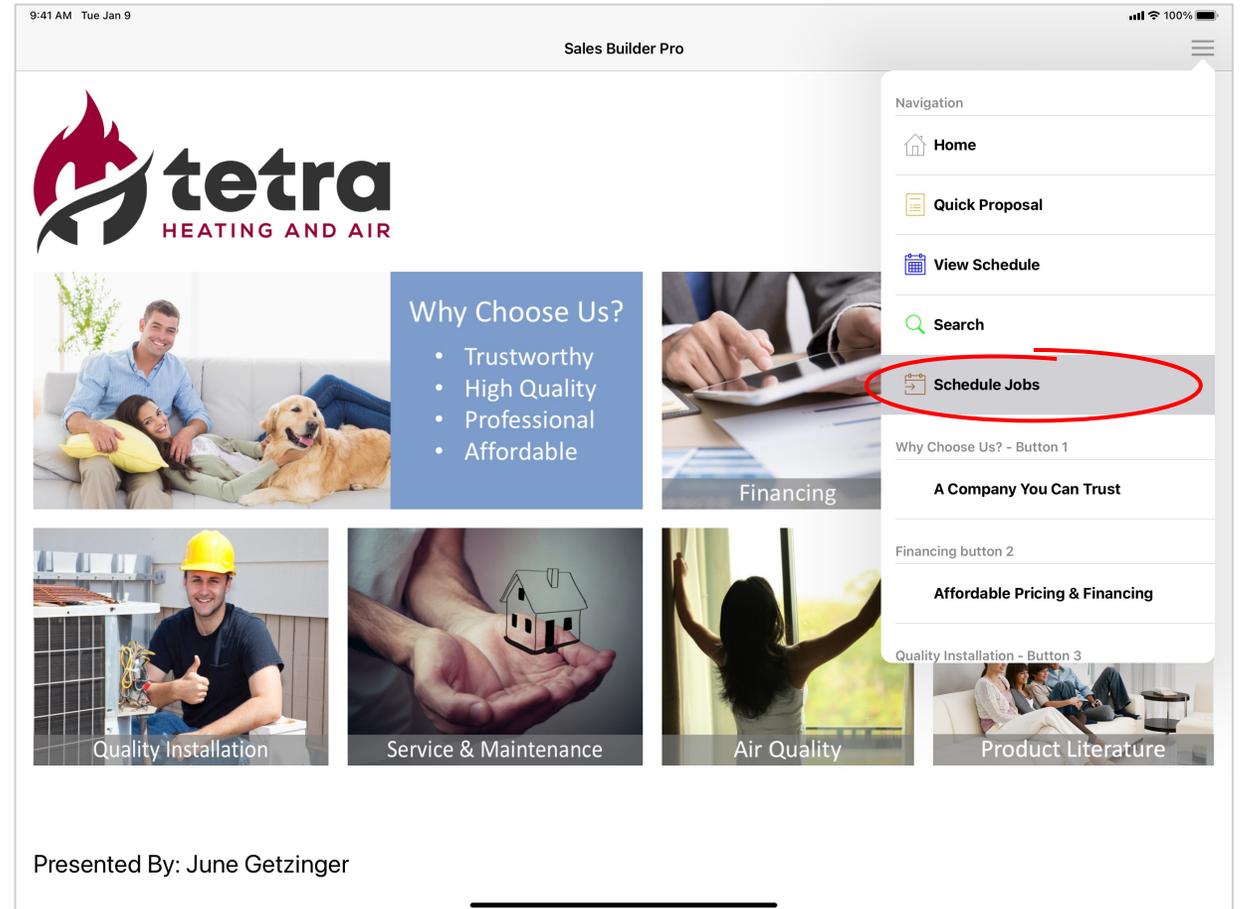
Add additional quotes to the open sales call

Build a SZ Ductless system

Navigation menu – User Default Settings

Schedule a Job

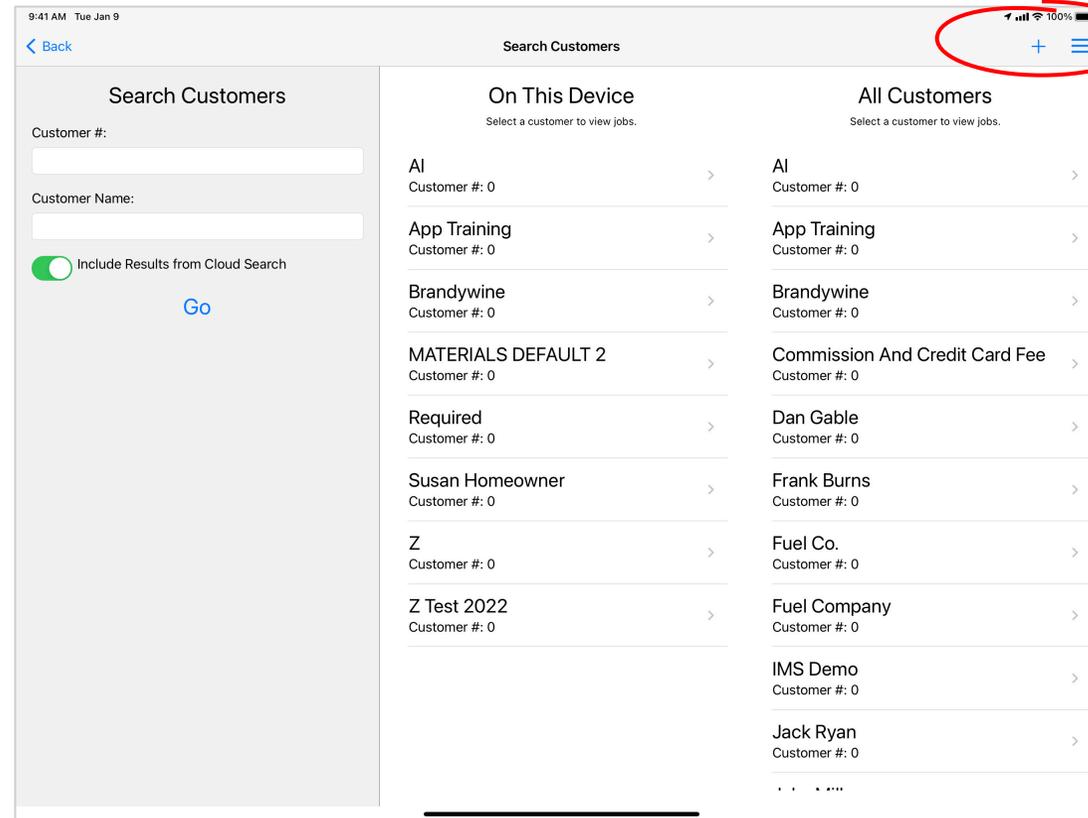
- Why?
- Easy workflow; arrive on the call, open a site survey, build the quote, email to the customer and complete the call all from your schedule
- Customer Information will pre-populate in the quote and site surveys
- Save time! Eliminate unnecessary typing during the sales call



Search and Select existing customer or “+” add a new customer

Enter Customer Name or # →

Touch Go →



← “+” Add a new Customer

Enter the date and time

Job Info, Notes and Items are optional.

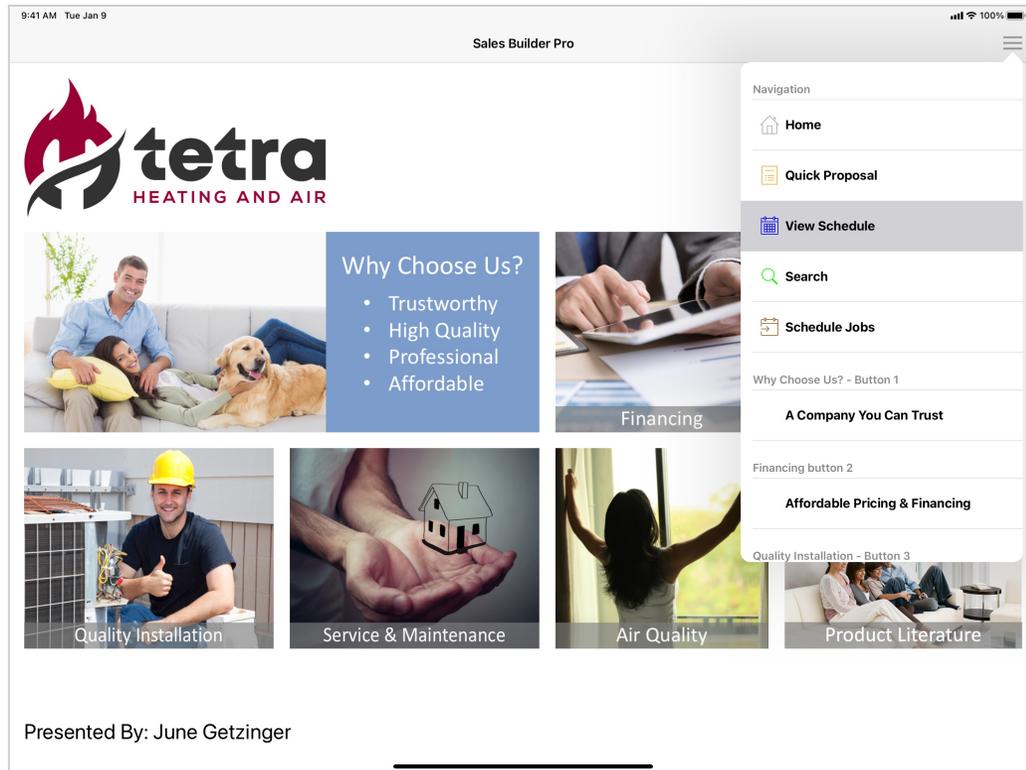
9:41 AM Tue Jan 9 100%

[Cancel](#) Add Job [Save](#)

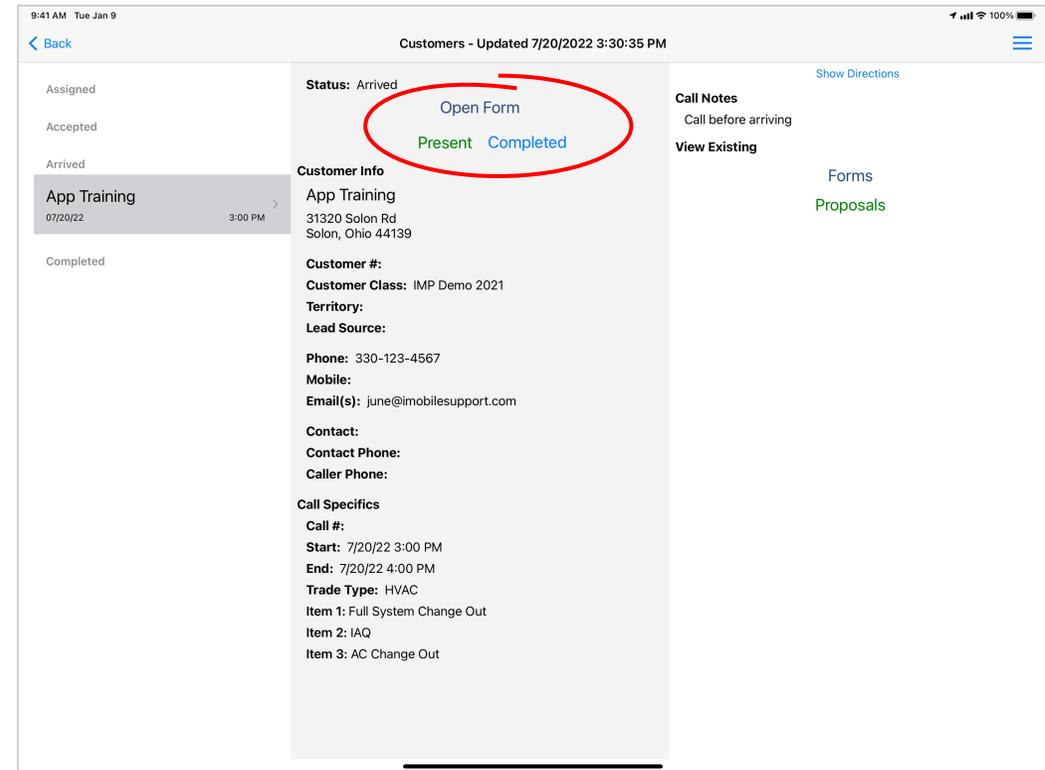
Customer	Job Info
Customer #: <input type="text" value="0"/>	Job #: <input type="text"/>
Name: <input type="text" value="App Training"/>	Trade Type: <input type="text" value="HVAC"/>
Date & Time	Notes
Scheduled Date: <input type="text" value="7/20/2022"/>	<input type="text" value="Call before arriving"/>
Start Time: <input type="text" value="3:00 PM"/>	
End Time: <input type="text" value="4:00 PM"/>	
	Items to Quote
	<input type="text" value="AC Change Out"/>
	<input type="text" value="Full System Change Out"/>
	<input type="text" value="IAQ"/>
	<input type="text"/>

Attach a Site Survey (Open Form)

View Schedule



Accept and Arrive at the Assigned job Open Form



Complete the Form



Open Form button is only available when you are arrived on the job. Make Open Form part of your workflow so that you can revise the form at a future date.

9:41 AM Tue Jan 9

Site Survey - Unitary v2.0

View Action

Customer

Customer #: 0

Name: App Training

Phone: 330-123-4567 Mobile:

Email(s): june@imobilesupport.com

Date

07/20/2022 3:34:25 PM

Customer Info

Source:

Job Address

Line 1: 31320 Solon Rd

Line 2:

City: Solon

State: Ohio Zip: 44139

Billing Address Same as Job Address

Line 1: 31320 Solon Rd

Line 2:

City: Solon

State: Ohio Zip: 44139

Street View of Job Location

Model Number

Location notes

Location photo

Existing Outdoor Unit - To Be Removed/Replaced

Is there an existing Outdoor Unit to be removed/replaced?

<Select>

Photo of existing Outdoor Unit and nameplate

Existing Outdoor Unit type (AC, HP or Packaged Unit)

<Select>

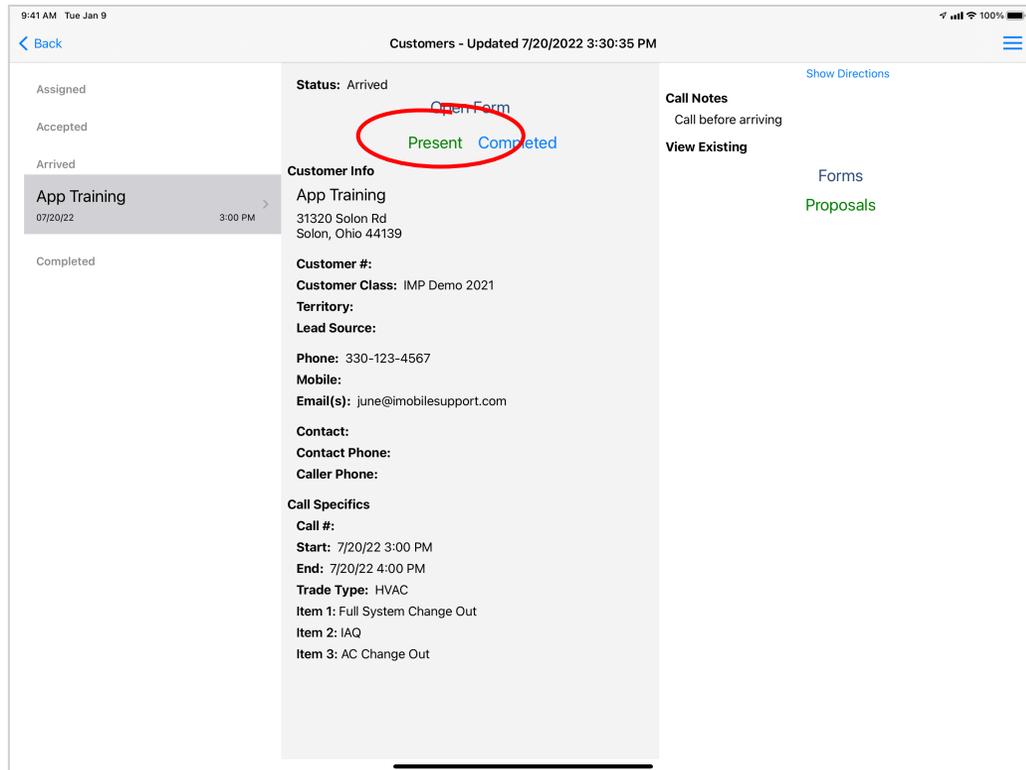
Existing Outdoor Unit notes

Close

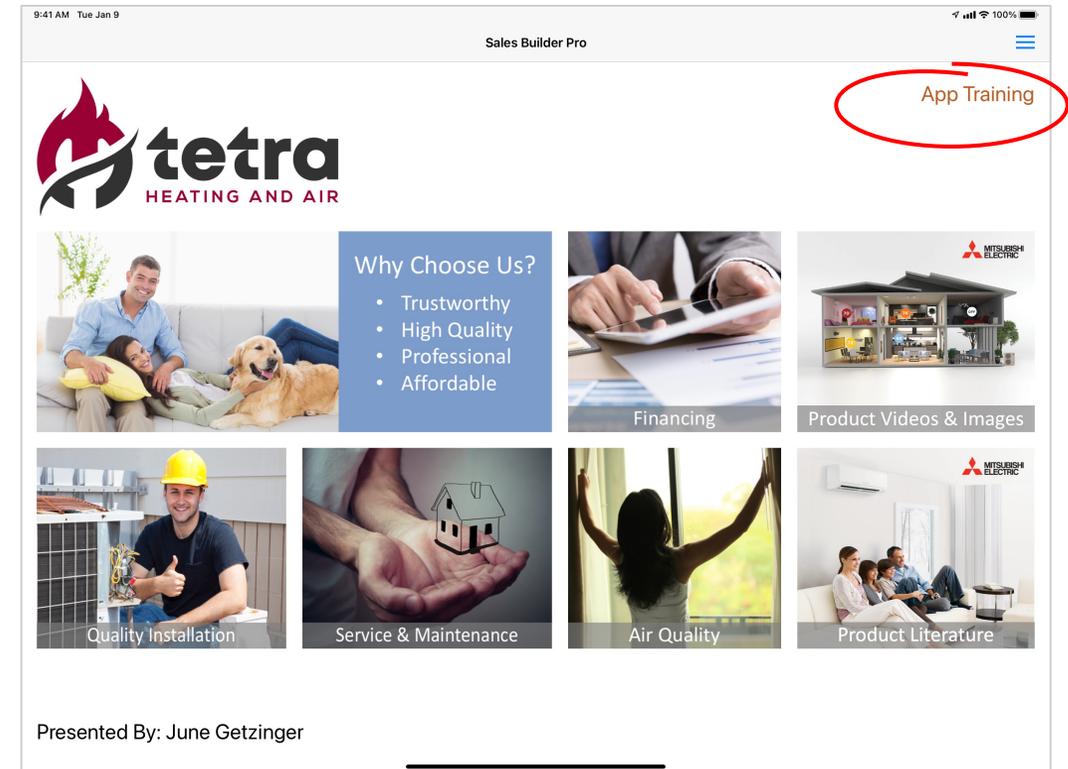
←----- Close to return to schedule

Pricing Adjustments

Present to return to homescreen



Touch customer name to open quote



Adjust Pricing

Option Tab: Discount, Pricing Adjustment, Install Button

Discounts

Instant Cash Rebate \$ 250 OR Percent %

Cancel Save

Total Discount: \$250

System

Total Product Discount
Suggested Retail Price \$13,631
Finance Price with Discount \$13,631
Cash Price with Discount

Total Investment

Finance Price with Discount \$13,631
Down Payment
Remaining Balance \$13,631

Cash Price Finance Price

Recommend Compare

Cash Price

EXAMPLE 5 year TRAINING (5% DF)
\$224.80 / mo. EXAMPLE 5 year TRAINING*

EXAMPLE Min Monthly TRAINING
\$203.10 / mo. EXAMPLE Min Monthly TRAINING*

EXAMPLE 4 year TRAINING

EXAMPLE 3 year TRAINING

EXAMPLE 2 year TRAINING

EXAMPLE 1 year TRAINING
\$1,078.58 / mo. EXAMPLE 1 year TRAINING*

\$203.10 / mo. EXAMPLE Min Monthly TRAINING*

*Estimate, approval required. Payment terms are determined by your selected financial partner.

Add-On (Services) and Material Tabs

Enhancement

Accessory Add-On **Material**

Miscellaneous Materials

Option	Price	Option	Price
<input checked="" type="checkbox"/> Return air filter box	0	<input type="checkbox"/> Chimney liner	
<input checked="" type="checkbox"/> 1 inch filter rack	0	<input type="checkbox"/> Flue pipe	
<input checked="" type="checkbox"/> Low voltage wiring	0	<input type="checkbox"/> PVC air intake/exhaust	
<input type="checkbox"/> Drain pan		<input type="checkbox"/> Outdoor pad	
<input type="checkbox"/> PVC drain		<input type="checkbox"/> Line set	ft.: <input type="text"/>
<input type="checkbox"/> Condensate pump		<input type="checkbox"/> Electric wiring whip	
		<input type="checkbox"/> RX-11 flush	

Subtotal (Opt 1): \$0 Subtotal (Opt 2): \$0 Subtotal (Opt 3): \$0

Option Tab Adjustments to Price

1. **Install** button
 - Overall Job Costs
 - Install Manager Labor and Materials
2. Total Product Discount
3. Suggested Retail Price

9:41 AM Tue Jan 9

< Back Option 3

System Components Ductless Clear

Cooling

Type: Air Conditioner
Manufacturer: Deluxe
Model: Gold DA1760
BTUs: 60,000
SEER | EER | HSPF: 17 | 13
Coil (IU): Deluxe DCF2417ST

Warranty: Parts 10 Year, Labor 1 Year, Compressor 10 Year

Heating

Type: Gas Furnace
Manufacturer: Deluxe
Model: Platinum D96VA0602317M
BTUs: 60,000
AFUE: 96%
Electric Heat:
Capacity:

Warranty: Parts 10 Year, Labor 1 Year, Heat Exchanger 20 Year

Summary

Cooling

Total Product Discount	
Suggested Retail Price	\$8,014
Finance Price with Discount	\$8,014
Cash Price with Discount	

Heating / Air Handling

Total Product Discount	
Suggested Retail Price	\$3,535
Finance Price with Discount	\$3,535
Cash Price with Discount	

Total Investment

Finance Price with Discount	\$11,549
Down Payment	<input type="text"/>
Remaining Balance	\$11,549

Cash Price Finance Price

Recommend Compare

<input checked="" type="checkbox"/> Cash Price	<input type="radio"/>
<input type="checkbox"/> EXAMPLE 5 year TRAINING (5% DF) \$190.45 / mo. EXAMPLE 5 year TRAINING*	<input type="radio"/>
<input checked="" type="checkbox"/> EXAMPLE Min Monthly TRAINING \$172.08 / mo. EXAMPLE Min Monthly TRAINING*	<input type="radio"/>
<input type="checkbox"/> EXAMPLE 4 year TRAINING	<input type="radio"/>
<input type="checkbox"/> EXAMPLE 3 year TRAINING	<input type="radio"/>
<input type="checkbox"/> EXAMPLE 2 year TRAINING	<input type="radio"/>

Customer Company Option 1 Option 2 **Option 3** Enhancement Notes Signature

Install button: Overall Job Costs, Install Kits and Labor Options

Touch “+” to display additional items

Touch in text box to display other items in the category

The screenshot shows an 'Install' app interface with the following items and costs:

Category	Item	Quantity	Unit	Description	Cost
Overall Job	Permit	125	each	HVAC Permit \$	\$125.00
Gold DA1760	Labor	4	hours	Standard Labor	\$666.68
	Install Kit	1	each	Standard Install Kit	\$88.33
	Electrical Whip	1	each	6 foot Electrical Whip	\$21.20
	Disconnect Box	1	each	Condenser Disconnect	\$35.33
	Lineset (Pre-Cut)	1	each	Lineset (Pre-Cut 010 ft.)	
	Outdoor Pad	1	each	Outdoor Pad 30 x 30 x 3	
Deluxe DCF6024M	Labor	1	hours	1 hr	\$181.82

A hand icon is shown touching the 'Outdoor Pad 30 x 30 x 3' text box, which has opened a dropdown menu with the following options:

- Outdoor Pad 30 x 30 x 3 (checked)
- Outdoor Pad 36 x 36 x 3
- Outdoor Pad 48 x 36 x 3
- Outdoor Pad 48 x 48 x 3

Discount and Hidden Pricing Adjustment

Touch Total Product Discount

9:41 AM Tue Jan 9

Option 1

System Components

Cancel Discounts Save

Instant Cash Rebate \$ 250 OR Percent %

Total Discount: \$250

System

Total Product Discount \$13,631

Suggested Retail Price \$13,631

Finance Price with Discount \$13,631

Cash Price with Discount \$13,631

Total Invoice \$13,631

Finance Payment \$13,631

Remaining Balance \$13,631

Cash Price Finance Price

Recommend Compare

EXAMPLE 5 year TRAINING (5% DF)
\$224.80 / mo. EXAMPLE 5 year TRAINING*

EXAMPLE Min Monthly TRAINING
\$203.10 / mo. EXAMPLE Min Monthly TRAINING*

EXAMPLE 4 year TRAINING

EXAMPLE 3 year TRAINING

EXAMPLE 2 year TRAINING

EXAMPLE 1 year TRAINING
\$1,078.58 / mo. EXAMPLE 1 year TRAINING*

\$203.10 / mo. EXAMPLE Min Monthly TRAINING*

*Estimate, approval required. Payment terms are determined by your selected financial partner.

Customer Company Option 1 Option 2 Option 3 Enhancement Notes Signature

Touch Suggested Retail

9:41 AM Tue Jan 9

Option 1

System Components Ductless

Clear

Cancel Price Adjustment Save

Increase System Price 125

Decrease System Price

System

Total Product Discount \$250

Suggested Retail Price \$13,631

Finance Price with Discount \$13,381

Cash Price with Discount \$13,381

Total Invoice \$13,381

Finance Payment \$13,381

Remaining Balance \$13,381

Cash Price Finance Price

Recommend Compare

EXAMPLE 5 year TRAINING (5% DF)
\$220.63 / mo. EXAMPLE 5 year TRAINING*

EXAMPLE Min Monthly TRAINING
\$199.38 / mo. EXAMPLE Min Monthly TRAINING*

EXAMPLE 4 year TRAINING

EXAMPLE 3 year TRAINING

EXAMPLE 2 year TRAINING

EXAMPLE 1 year TRAINING
\$1,057.75 / mo. EXAMPLE 1 year TRAINING*

\$199.38 / mo. EXAMPLE Min Monthly TRAINING*

*Estimate, approval required. Payment terms are determined by your selected financial partner.

Customer Company Option 1 Option 2 Option 3 Enhancement Notes Signature

Add-On Tab (Services)

The screenshot shows the 'Add-On' tab selected. The main heading is 'Options Not Included in Equipment Prices'. Below this, there are several categories with expandable options (indicated by '+' icons):

- Dryer vent cleaning**
- Blown-In Insulation**
- Water Heater**
- Duct Work**
- Electrical Services**
 - 1 each Additional electrical work (Hourly Estimate) TRAINING \$107.00
 - Subtotal \$107.00
- Miscellaneous**

On the right side, there are three summary boxes for 'Add-On (Option 1)', 'Add-On (Option 2)', and 'Add-On (Option 3)', each showing a 'Total' price of \$501.00. A hand icon is shown touching the '+' icon next to the 'Additional electrical work' item. A red dashed arrow points from this '+' icon to the 'Miscellaneous' category's '+' icon.

Material Tab

The screenshot shows the 'Material' tab selected. The main heading is 'Miscellaneous Materials'. Below this, there is a list of materials with checkboxes and prices:

Option	Price	Option	Price
<input checked="" type="checkbox"/> Return air filter box	0	<input type="checkbox"/> Chimney liner	
<input checked="" type="checkbox"/> 1 inch filter rack	0	<input type="checkbox"/> Flue pipe	
<input checked="" type="checkbox"/> Low voltage wiring	0	<input type="checkbox"/> PVC air intake/exhaust	
<input type="checkbox"/> Drain pan		<input type="checkbox"/> Outdoor pad	
<input type="checkbox"/> PVC drain		<input type="checkbox"/> Line set	ft.: <input type="text"/>
<input type="checkbox"/> Condensate pump		<input type="checkbox"/> Electric wiring whip	
<input type="checkbox"/> RX-11 flush		<input type="checkbox"/>	

At the bottom right, there are three subtotal boxes: 'Subtotal (Opt 1): \$0', 'Subtotal (Opt 2): \$0', and 'Subtotal (Opt 3): \$0'. A red dashed arrow points from the '+' icon at the bottom left of the list to the 'Miscellaneous' category's '+' icon in the previous screenshot.

Touch the "+" to add services and materials on the fly

Customize the quote PDF for your customer

9:41 AM Tue Jan 9 100%

Signature

[Customize](#)

Proposal for App Training

Option 1 [View](#)

 **\$250 Savings**

Description
Air Conditioner, Gas Furnace, Indoor Unit (Coil), 1 Accessory, 1 Additional Service

 [Open](#)

Deluxe Equipment

- ✓ Gold DA1760 Air Conditioner
- ✓ Platinum D96VA1152524M Gas Furnace
- ✓ Deluxe DCF6024M Indoor Unit (Coil)

Accessories

- ✓ Thermostat - Aprilaire 8444 1H/1C, Dual Powered Non-Programmable TRAINING

Additional Services

- ✓ Service Agreement - HVAC Comfort Plus TRAINING

[Show Details](#)

Select payment (includes taxes & fees)

- \$192.55** / mo. EXAMPLE Min Monthly TRAINING*
+ \$1,000 down payment
Amount Financed: \$12,923
- \$213.08** / mo. EXAMPLE 5 year TRAINING*
+ \$1,000 down payment
- \$1,021.92** / mo. EXAMPLE 1 year TRAINING*
+ \$1,000 down payment
- \$12,138** Balance
+ \$1,000 down payment

*Estimate, approval required. Payment terms are determined by your selected financial partner.

Option 2 [View](#)

 **\$200 Savings**

Description
Heat Pump, Air Handler, Indoor Unit (Coil), Electric Heater, 1 Accessory, 1 Additional Service

 [Open](#)

Deluxe Equipment

- ✓ Platinum DP2024 Heat Pump
- ✓ Deluxe DH1T3621M Air Handler
- ✓ Deluxe DCF2417H Indoor Unit (Coil)
- ✓ Deluxe DXBH-1724A1 Electric Heater

Accessories

- ✓ Thermostat - Honeywell Pro 1000 Horizontal Non-Programmable, Digital Heat Only (TH1100DH1004/U) TRAINING

Additional Services

- ✓ Service Agreement - HVAC Comfort Plus TRAINING

[Show Details](#)

Select payment (includes taxes & fees)

- \$191.97** / mo. EXAMPLE Min Monthly TRAINING*
+ \$1,000 down payment
- \$212.45** / mo. EXAMPLE 5 year TRAINING*
+ \$1,000 down payment
- \$1,019.00** / mo. EXAMPLE 1 year TRAINING*
+ \$1,000 down payment
- \$12,104** Balance
+ \$1,000 down payment

*Estimate, approval required. Payment terms are determined by your selected financial partner.

Option 3

Description
Air Conditioner, Gas Furnace, Indoor Unit (Coil), 1 Accessory, 1 Additional Service

 [Open](#)

Deluxe Equipment

- ✓ Gold DA1760 Air Conditioner
- ✓ Platinum D96VA0602317M Gas Furnace
- ✓ Deluxe DCF2417ST Indoor Unit (Coil)

Accessories

- ✓ Thermostat - Honeywell T6 Pro Programmable 2H/2C or 2 HP/1C HP (TH6220U2000/U) TRAINING

Additional Services

- ✓ Service Agreement - HVAC Comfort Plus TRAINING

[Show Details](#)

Select payment (includes taxes & fees)

- \$180.47** / mo. EXAMPLE Min Monthly TRAINING*
Amount Financed: \$12,112
- \$199.73** / mo. EXAMPLE 5 year TRAINING*
- \$958.25** / mo. EXAMPLE 1 year TRAINING*

*Estimate, approval required. Payment terms are determined by your selected financial partner.

Customer Company 1 Option 1 2 Option 2 3 Option 3 Enhancement Notes Signature

Customize Proposal

Proposal Name

Option Name and Description

Recommended Settings:

- Show Model Numbers "on"
- Show Line Item Equipment Discounts "on"
- Show Line Item Pricing "OFF"

Add/Remove Bullet Points

**Changes made here only apply to the open quote*

Add additional quotes to an open job

- Touch Customer Name
- Create New Estimate

2:51 PM Thu Jul 21

Sales Builder Pro

App Training

Create New or Select Existing Estimate

- Create New >
- Proposal for App Training - 7/20/2022 3:35:12 PM (Obsolete) >
- Proposal for App Training - 7/20/2022 3:58:55 PM (Pending) >
- Proposal for App Training - 7/21/2022 10:47:38 AM (Pending) >

tetra
HEATING AND AIR

Why Choose Us

- Trustworthy
- High Quality
- Professional
- Affordable

Financing

Product Videos & Images

Quality Installation

Service & Maintenance

Air Quality

Product Literature

MITSUBISHI ELECTRIC

Presented By: June Getzinger

Build a SZ Ductless System

Enter Regional Specific **Design Criteria**

Select **ODU** first

Layout the system

2:56 PM Thu Jul 21

Option 1

System Components Ductless

Clear

Design Criteria

Cooling Heating

Indoor Temp 75 °F WB 69 °F DB

Outdoor Temp 100 °F DB 0 °F WB

Altitude 2500 ft

Outdoor Unit

Type Heat Pump

Manufacturer LG

Model LAU150HYV3 Art Cool Premier LGRED

BTU Rated Cooling 15,000 Heating 18,000

SEER | EER | HSPF 25 15 13.5

Indoor Units Min 1 Max 1

Warranty

Parts 12 Year

Labor

Compressor 12 Year

Indoor Unit Selections

Layout

System	Count	BTUs
Cooling	1	13,693 / 16,611
Heating	1	9,472 / 9,472

Bedroom #1

LAN150HYV3 Hi Efficiency

BTU Rated Cooling 15,000 Heating 18,000

BTU Designed 13,693 9,472

System

Total Product Discount

Suggested Retail Price \$10,178

Finance Price with Discount \$10,178

Cash Price with Discount \$9,567

Total Investment

Cash Price with Discount \$9,567

Down Payment

Remaining Balance \$9,567

Cash Price Finance Price

Recommend Compare

Cash Price \$9,567 Balance

EXAMPLE 5 year TRAINING (5% DF) \$167.85 / mo. EXAMPLE 5 year TRAINING*

EXAMPLE Min Monthly TRAINING \$151.65 / mo. EXAMPLE Min Monthly TRAINING*

EXAMPLE 4 year TRAINING

EXAMPLE 3 year TRAINING

EXAMPLE 2 year TRAINING

EXAMPLE 1 year TRAINING \$805.33 / mo. EXAMPLE 1 year TRAINING*

\$9,567 Balance

Customer Company Option 1 Option 2 Option 3 Enhancement Notes Signature

System Layout

- Distance, height and bends are required fields.
- If equivalent distance is used, enter 0 for number of bends
- Distance values are used for system piping derates and lineset lengths
- Save to return to Option ductless tab

Cancel Layout Save

Number of Branch Boxes: Warning: Changing branch boxes may clear indoor unit selections as needed.



Indoor Unit Selections

1	Location:	<input type="text" value="Bedroom #1"/>
	Distance to Outdoor Unit:	<input type="text" value="15"/> ft
	Height Above Outdoor Unit:	<input type="text" value="12"/> ft
	Height Below Outdoor Unit:	<input type="text"/> ft
	Number of Bends:	<input type="text" value="0"/>

Select Indoor Unit

3:13 PM Thu Jul 21

< Back Option 1

System Components **Ductless** Clear

Outdoor Unit

Type Heat Pump

Manufacturer LG

Model LAU150HYV3 Art Cool Premier LGRED

Warranty Parts 12 Year Labor Compressor 12 Year

BTU Rated Cooling 15,000 Heating 18,000

SEER | EER | HSPF 25 15 13.5

Indoor Units Min 1 Max 1

Indoor Unit Selections

Layout

Layout	Cooling	Heating	BTUs
1	1	1	13,693 / 16,611
2	1	1	9,472 / 9,472

Bedroom #1

LAN150HYV3 Hi Efficiency

BTU Rated	Cooling	Heating
15,000	13,693	9,472

Ins Review

Notes

AHRI

Customer Company Option 1 Option 2

- Touch the tan box under the progress bar to open Indoor Unit Selection tool

2:57 PM Thu Jul 21

Cancel Select Indoor Unit Save

1 Bedroom #1

Model Number Cooling BTUs Heat BTUs

LAN150HYV3 Hi Efficiency 15,000

LAN150HYV3 Hi Efficiency

- Touch the Indoor Unit image
- Select the compatible IDU
- Save to return to the Option Ductless tab

- **Install** Button to select compatible optional and required parts
- **Review** button to display system Design Considerations



3:13 PM Thu Jul 21

Option 1

System Components Ductless

Clear

Outdoor Unit

Type: Heat Pump
Manufacturer: LG
Model: LAU150HYV3 Art Cool Premier LGRED

BTU Rated: Cooling 15,000 Heating 18,000
SEER | EER | HSPF: 25 | 15 | 13.5
Indoor Units: 1

Warranty: Parts 12 Year, Labor, Compressor 12 Year

Indoor Unit Selections

Layout

Unit	Cooling	Heating	BTUs
1	1	1	13,693 / 16,611

Bedroom #1
LAN150HYV3 Hi Efficiency
Cooling Heating
BTU Rated 15,000 18,000
BTU Designed 13,693 9,472

Install Review

Notes
AHRI

System

Total Product Discount
Suggested Retail Price \$10,178
Finance Price with Discount \$10,178
Cash Price with Discount \$9,567

Total Investment

Cash Price with Discount \$9,567
Down Payment
Remaining Balance \$9,567

Cash Price Finance Price

Recommend Compare

- Cash Price \$9,567 Balance
- EXAMPLE 5 year TRAINING (5% DF) \$167.85 / mo. EXAMPLE 5 year TRAINING*
- EXAMPLE Min Monthly TRAINING \$151.65 / mo. EXAMPLE Min Monthly TRAINING*
- EXAMPLE 4 year TRAINING
- EXAMPLE 3 year TRAINING
- EXAMPLE 2 year TRAINING
- EXAMPLE 1 year TRAINING \$805.33 / mo. EXAMPLE 1 year TRAINING*

\$9,567 Balance

Customer Company Option 1 Option 2 Option 3 Enhancement Notes Signature

Install Button

- Add Overall Job costs
- Adjust Labor hours
- Select compatible optional parts

4:22 PM Thu Jul 21 Not Charging

Install Save

1 Day < 1% Risk ⓘ

Overall Job

Permit 1 each HVAC Permit \$ ⓘ \$1.10
 Labor 4 hours Standard Labor ⓘ \$800.00
 Install Kit 1 each Standard Install Kit ⓘ \$106.00

LAN150HYV3 Art Cool Premier LGRED (Outdoor Unit)

Labor 4 hours Standard Labor ⓘ \$800.00
 Install Kit 1 each Standard Install Kit ⓘ \$106.00

LAN150HYV3 Hi Efficiency (Wall Mounted) - Bedroom #1

Labor 4 hours Standard Labor ⓘ \$800.00
 Install Kit 1 each Standard Install Kit ⓘ \$106.00
 Lineset 12 ft 3/8" x 5/8" Per ft. ⓘ \$178.08
 Individual Control 1 each INACTIVE - PREMTA100 - Call for Price ⓘ \$0.00

Subtotal \$1,991.18

Review Button

- View Design Considerations

4:22 PM Thu Jul 21 Not Charging

Design Considerations Done

Values Used In Calculations

Indoor Cooling Temp.	75 °F WB
Indoor Heating Temp.	69 °F DB
Outdoor Cooling Temp.	100 °F DB
Outdoor Heating Temp.	0 °F WB
Altitude	2500 ft
Farthest Pipe Length	12.0 ft
Bends to Farthest IDU	0
Bend Factor	0.5
Equivalent Pipe Length	12.0 ft

Outdoor Unit

Model	ODU BTU Rated	Adjustments			ODU BTU Designed
		Temp.	Defrost	Altitude	
LAN150HYV3 Art Cool Premier LGRED	15,000	13.0%	*	-2.0%	16,611
	18,000	-46.3%	*	-2.0%	9,472

Indoor Units

Model	IDU BTU Rated	Adjustments		
		IDU Combination	Equiv. Pipe Length	Altitude
LAN150HYV3 Hi Efficiency	15,000	*	0.0%	-8.7%
	18,000	*	0.0%	-8.7%

Model	IDU BTU Adjusted	ODU BTU Designed	ODU BTU Available	IDU BTU Designed
LAN150HYV3 Hi Efficiency	13,693	16,611	13,693 / 13,693 = 100.0%	13,693
	16,432	9,472	16,432 / 16,432 = 100.0%	9,472

* No Adjustment Applied

NOTE: All adjustments made above are estimates.

Outdoor unit designed capacity was calculated using the following formula:
 ODU BTU Designed = ODU BTU Rated * (1 + Adjusted Temperature %) * (1 + Defrost Adjustment %) * (1 + Altitude Adjustment %)

Navigation Menu

- View Schedule
- Touch **Completed**
- Job data is sent to the Management Portal at Job Completion

The screenshot displays a mobile application interface for managing customer appointments. The top status bar shows the time as 4:30 PM on Thursday, July 21st, and the battery level is at 100% with 'Not Charging' indicated. The main header area includes a back arrow and 'Create Proposal' link on the left, and 'Customers - Updated 7/21/2022 4:26:14 PM' on the right.

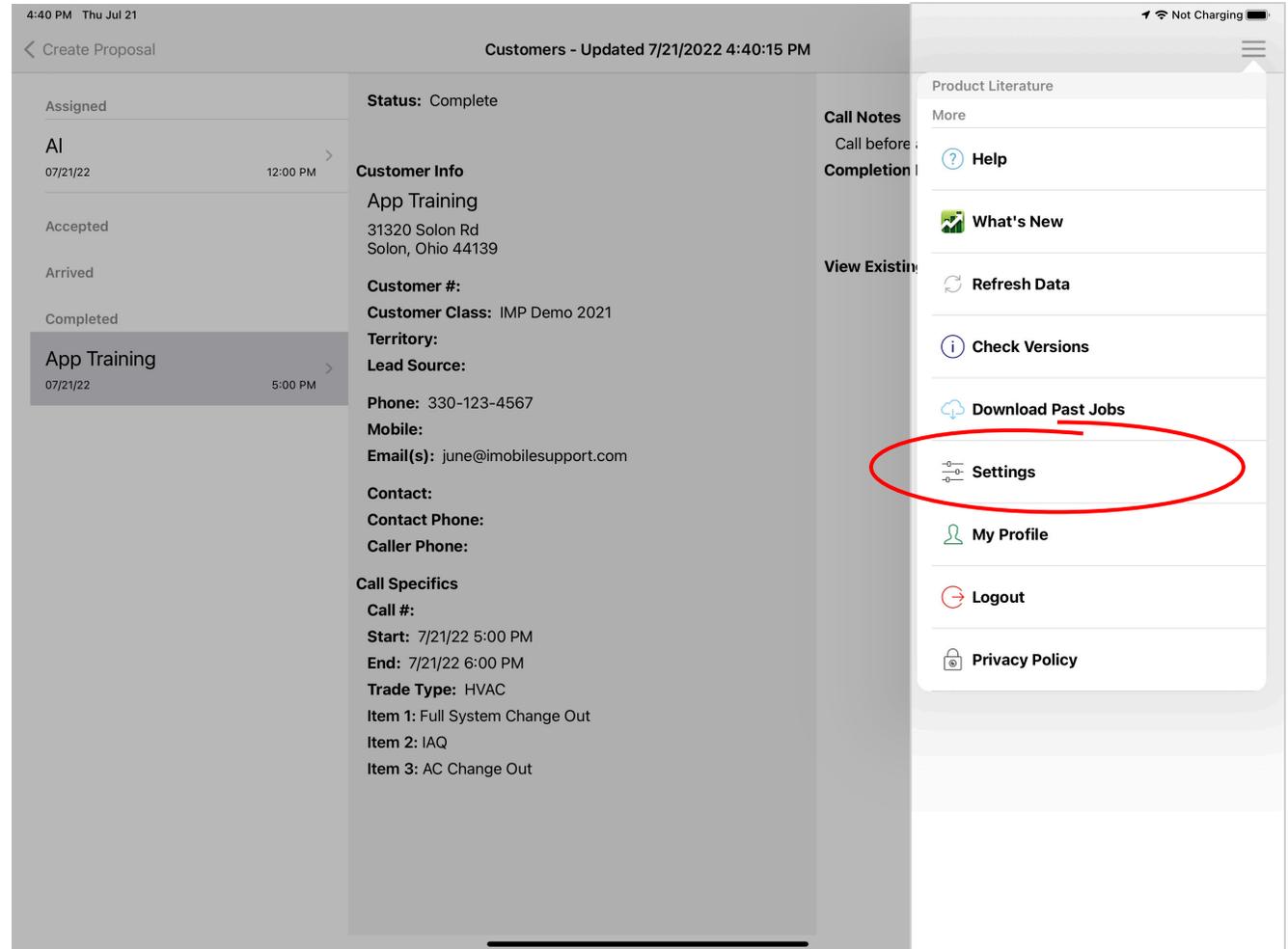
The central content area is divided into three columns:

- Left Column (Timeline):** Shows a list of appointment stages: 'Assigned' (AI, 07/21/22, 12:00 PM), 'Accepted', 'Arrived' (App Training, 07/21/22, 5:00 PM), and 'Completed'. The 'App Training' entry is highlighted with a grey background.
- Middle Column (Customer Info):** Displays details for the current appointment: 'Status: Arrived', 'Open Form' (with a red circle around it), 'Present' (green), and 'Completed' (blue, with a red circle around it). Below this is 'Customer Info' including 'App Training', address '31320 Solon Rd Solon, Ohio 44139', 'Customer #:', 'Customer Class: IMP Demo 2021', 'Territory:', 'Lead Source:', 'Phone: 330-123-4567', 'Mobile:', 'Email(s): june@imobilesupport.com', 'Contact:', 'Contact Phone:', and 'Caller Phone:'. The 'Call Specifics' section lists 'Call #:', 'Start: 7/21/22 5:00 PM', 'End: 7/21/22 6:00 PM', 'Trade Type: HVAC', and three items: 'Item 1: Full System Change Out', 'Item 2: IAQ', and 'Item 3: AC Change Out'.
- Right Column (Call Notes):** Contains 'Call Notes', 'Call before:', and 'View Existing:'.

A navigation menu is overlaid on the right side of the screen, featuring a hamburger menu icon at the top. The menu items are: 'Home', 'Quick Proposal', 'View Schedule' (circled in red), 'Search', 'Schedule Jobs', 'Why Choose Us? - Button 1', 'A Company You Can Trust', 'Financing button 2', 'Affordable Pricing & Financing', and 'Quality Installation - Button 3'.

More Settings

- Navigation Menu
- Scroll to More section
- Settings: User Defaults
- *Changes to Settings will apply to new proposals ONLY*



User Proposal Defaults

4:44 PM Thu Jul 21

Customers - Updated 7/21/2022 4:43:45 PM

Assigned

AI
07/21/22 12:00 PM

Accepted

Arrived

Completed

App Training
07/21/22 5:00 PM

Status: Complete

Customer Info

App Training
31320 Solon Rd
Solon, Ohio 44139

Customer #:
Customer Class: IMP Demo 2021
Territory:
Lead Source:

Phone: 330-123-4567
Mobile:
Email(s): june@imobilesupport.com

Contact:
Contact Phone:
Caller Phone:

Call Specifics

Call #:
Start: 7/21/22 5:00 PM
End: 7/21/22 6:00 PM
Trade Type: HVAC
Item 1: Full System Change Out
Item 2: IAQ
Item 3: AC Change Out

Settings

Jobs

Default Trade Type HVAC

Proposals

Proposal Name - Use {Customer} to include the customer name

Custom

Default Proposal for {Customer}

Show Model Numbers

Yes No Default Yes

Show Line Item Pricing

Yes No Default Yes

Include Brochures With Proposal

Yes No Default Yes

Parts Label Warranty

Labor Label Warranty

Compressor Label Warranty

Heat Exchanger Label Warranty

Options

Option 1 Name

Custom

Enter a Custom Proposal Name for your customers or use the Company Default

Recommended Proposal Settings:

- Show Model Number – Yes
- Show Line Item Pricing – No. Present a system price
- Include Brochures - Yes

Option Name and Description

022 4:51:55 PM

Cancel Settings Save

Options

Option 1 Name
 Custom
 Default Option 1

Option 1 Description
 Custom
 Default None

Option 2 Name
 Custom
 Default Option 2

Option 2 Description
 Custom
 Default None

Option 3 Name
 Custom
 Default Option 3

Enter a Custom Name
Examples:
Most Efficient, Best Value

Enter a Custom Description
Example:
Choose this system for lower utility bills.

Ductless Design Criteria and End-User Sales Tax

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Cancel Settings Save

Default None

Option 3 Name
 Custom
 Default Option 3

Option 3 Description
 Custom
 Default None

Ductless Design Criteria

	Cooling	Heating
Indoor Temperature	75 °F WB	69 °F DB
Outdoor Temperature	100 °F DB	0 °F WB
Altitude	2500	ft

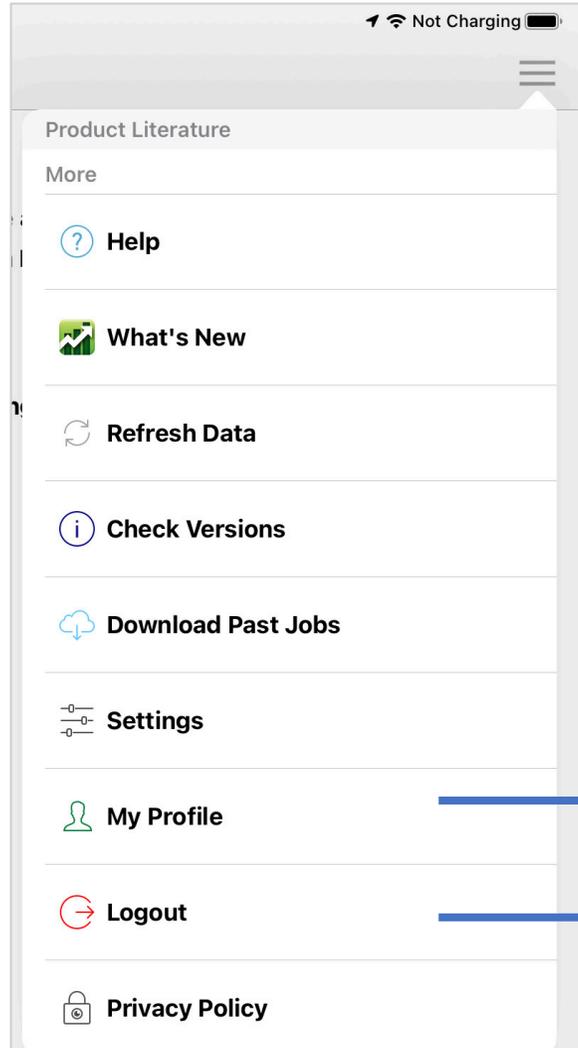
Taxes & Fees

Show Taxes & Fees by Line Item

Change ductless design criteria values

Settings for End-User Sales Tax

Final thoughts:



Visit **My Profile** to change your Password

Please Logout of the app at the end of each week. It's Good Housekeeping!