

## Sales Builder Pro / Service Titan Integration Overview

### (1) Service Titan Workflow

- Select Customer and Schedule a sales call (“job”)
- Dispatch a Sales Rep (“Technician”)
- Normal Service Titan workflow remains unchanged

### (2) Interface

- Customer data and schedule information is automatically transferred to Sales Builder Pro
- Integration eliminates error-prone, redundant data entry

### (3) Sales Builder Pro Workflow

- Comfort Consultant (“Technician”) accepts an assigned “job”
- Comfort Consultant (“Technician”) creates a Sales Proposal for the customer consisting of up to three HVAC equipment options
- Normal Sales Builder Pro workflow remains unchanged

### (4) Interface

- Proposal data (HVAC equipment, accessories, add-on services such as duct work and install materials) is automatically transferred to Service Titan
- Integration eliminates error-prone, redundant data entry



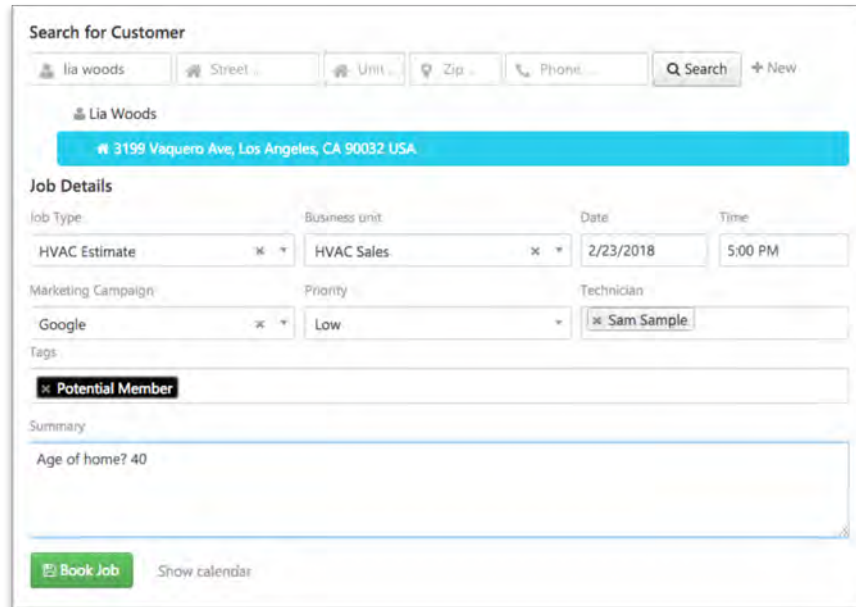
Appendix A – Screen Shots

Appendix B – Additional Notes

## Appendix A - Screen Shots

### Create Job on ServiceTitan

- Select Customer
- Select Business Unit
- Select Technician (Sales Rep)
- Book Job sends info to SBP







### Customer and Job Information is Sent to Sales Builder Pro

- Sales Rep Accepts the job



- Option 1 tab
- Selecting HVAC Components

< Back
Option 1

System	Components	Ductless	
<b>Cooling</b>			<b>Clear</b>
Type	Air Conditioner		
Manufacturer	Deluxe		
Model	16DS1618 Silver Series		
BTUs	18,000		
SEER   EER   HSPF	16.5		
Coil (IU)	CHNC2417000	Compressor	20 Year
<b>Heating</b>			
Type	Gas Furnace		
Manufacturer	Deluxe		
Model	21DS10120 Silver Series		
BTUs	110,000		
AFUE	80%		
Electric Heat		Heat Exchanger	20 Year

**Warranty**

Parts	10 Year
Labor	3 Year

**Total Investment**

Finance Price with Discount	\$7,041
Down Payment	
<b>Remaining Balance</b>	<b>\$7,041</b>

Cash Price ☒ Finance Price ☐

	5 Year
	4 Year
	3 Year

Mitsubishi Electric Zoned Comfort Solutions "Ductless" tab includes layout and design considerations including

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Option 2
☰

Components

Ductless

Clear

### Indoor Unit Selections


**Layout**

Cooling	2	Heating	BTUs	19,929 / 22,656
Heating	2	3	BTUs	20,707 / 22,435

**Sun Room**  
SEZ-KD09NA4

Cooling	Heating
BTU Rated 8,100	10,900
BTU Designed 6,817	6,895




Mountroom Ducted

**Bonus Room**  
MFZ-KA09NA

Cooling	Heating
BTU Rated 9,000	10,900
BTU Designed 6,656	6,906




Floor-mount

**Guest Room**  
MSZ-FH09NA

Cooling	Heating
BTU Rated 9,000	10,900
BTU Designed 6,656	6,906



Wall mount Ductless

**Finance Price with Discount \$20,598**

Cash Price with Discount

**Total Investment**

Finance Price with Discount \$20,598

Down Payment

**Remaining Balance \$20,598**

Cash Price ☒ Finance Price

3 year NO INTEREST (expires April 15, 2018)

5 year

Green Sky 85 month (expires on Nov 15)

ServiceFinance

Synchrony 85 months ✓

4 year Synchrony 6209

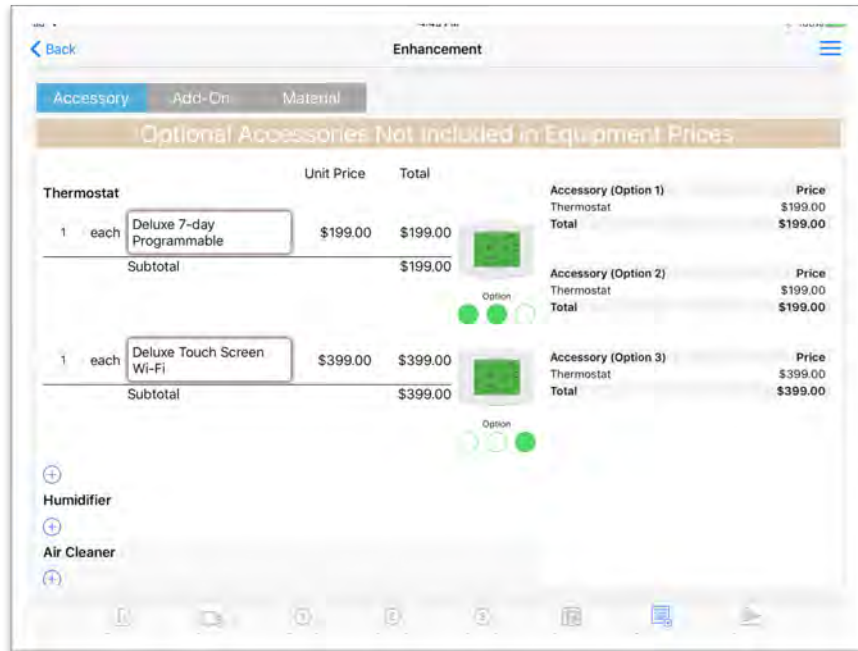
**\$242.33 / mon**

Review
Option 1
Option 2
Option 3
Submit
Environment
Signature

## Select Accessories and Add-On Services

Typical Accessories include items such as

- Thermostats
- Humidity Controls
- Air Filters
- Air Cleaners
- Air Purifiers
- UV Lights
- Zoning Controls



**Enhancement**

Accessory Add-On Material

**Optional Accessories Not Included in Equipment Prices**

Item	Unit Price	Total
Thermostat 1 each Deluxe 7-day Programmable	\$199.00	\$199.00
Subtotal		\$199.00
Thermostat 1 each Deluxe Touch Screen Wi-Fi	\$399.00	\$399.00
Subtotal		\$399.00

Accessory (Option 1) Thermostat Total Price \$199.00

Accessory (Option 2) Thermostat Total Price \$199.00

Accessory (Option 3) Thermostat Total Price \$399.00

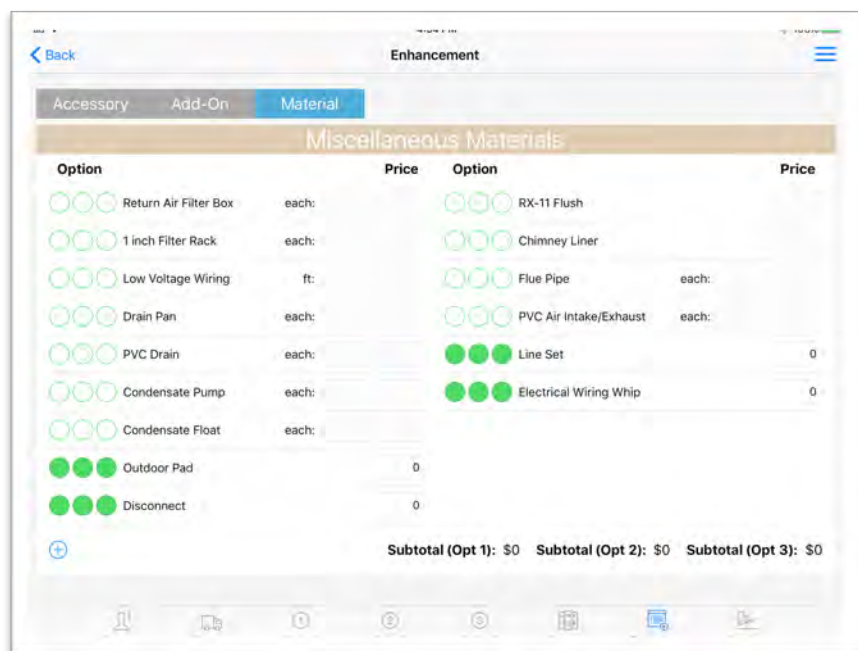
Humidifier

Air Cleaner

## Select Install Materials

Installations items are often shown at zero dollars not because they are free but the cost is included in the equipment cost/price.

Note on Sales Builder Pro the three green dots correspond to option 1, 2 and 3, respectively



**Enhancement**

Accessory Add-On Material

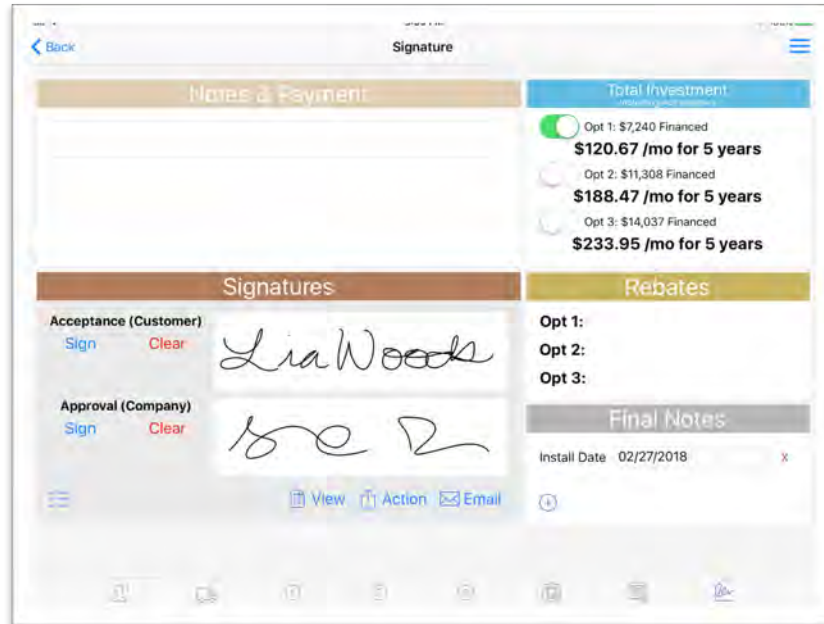
**Miscellaneous Materials**

Option	Price	Option	Price
Return Air Filter Box each:		RX-11 Flush	
1 inch Filter Rack each:		Chimney Liner	
Low Voltage Wiring ft:		Flue Pipe each:	
Drain Pan each:		PVC Air Intake/Exhaust each:	
PVC Drain each:		Line Set 0	
Condensate Pump each:		Electrical Wiring Whip 0	
Condensate Float each:			
Outdoor Pad 0			
Disconnect 0			
Subtotal (Opt 1): \$0		Subtotal (Opt 2): \$0	
		Subtotal (Opt 3): \$0	

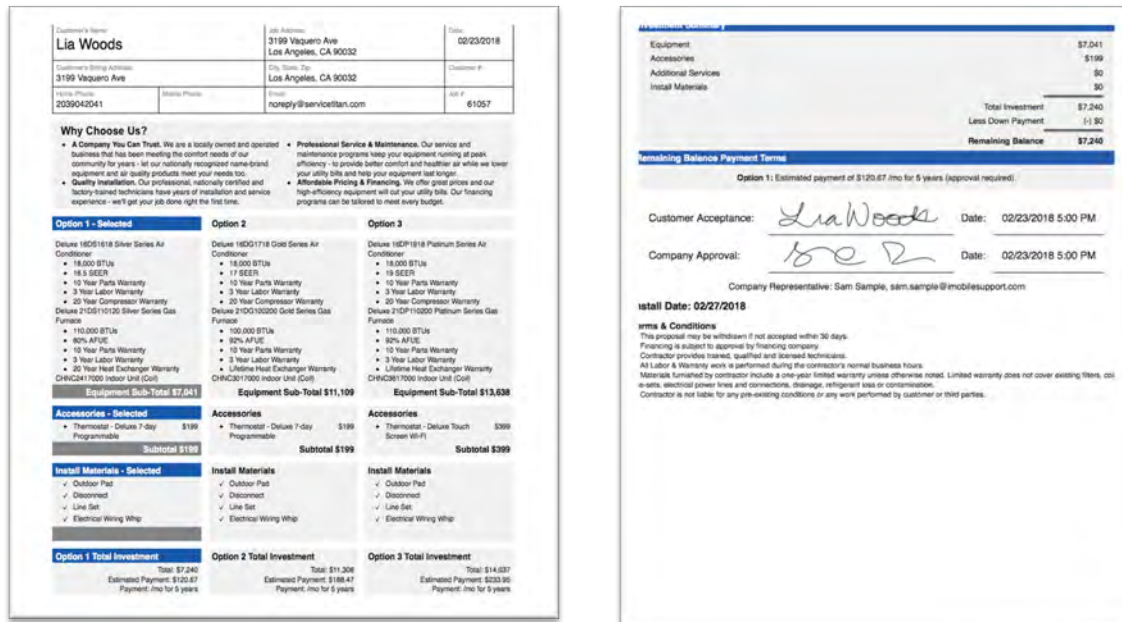


HVAC equipment Options are selected and the proposal is signed

One or more equipment options may be selected



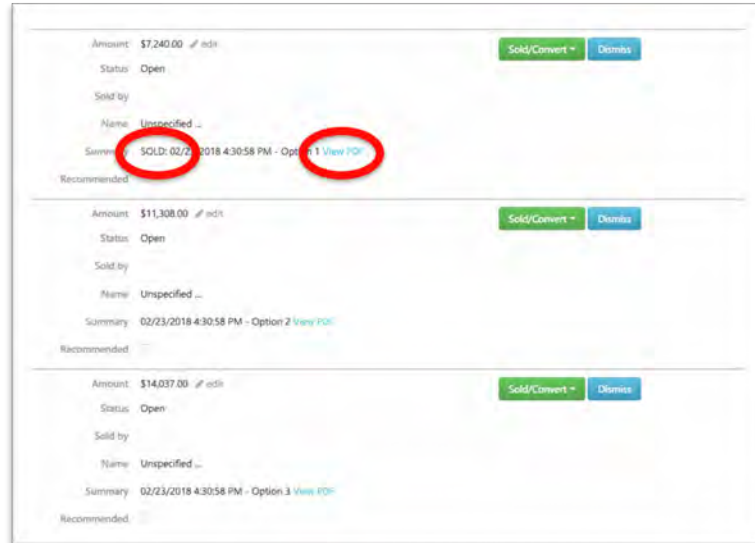
A multi-page PDF is created



## ServiceTitan Receives Estimates from Sales Builder Pro

Selected Options appear with SOLD in the Summary

Each estimate includes a link to view the PDF that was created in Sales Builder Pro



Amount: \$7,240.00 ☐ edit

Status: Open

Sold by:

Name: Unspecified ...

Summary: **SOLD: 02/23/2018 4:30:58 PM - Option 1** [View PDF](#)

Recommended: ☐

Amount: \$11,308.00 ☐ edit

Status: Open

Sold by:

Name: Unspecified ...

Summary: 02/23/2018 4:30:58 PM - Option 2 [View PDF](#)

Recommended: ☐

Amount: \$14,037.00 ☐ edit

Status: Open

Sold by:

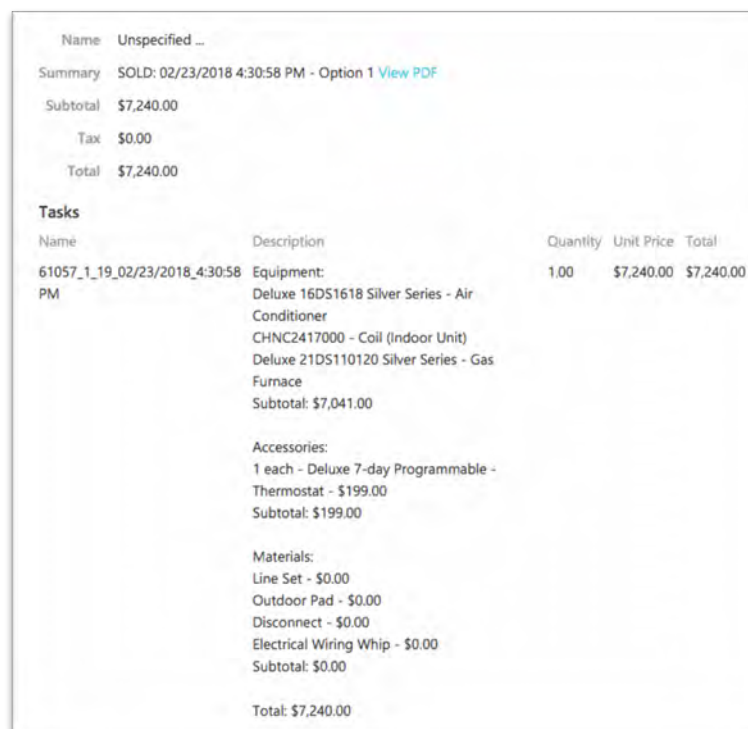
Name: Unspecified ...

Summary: 02/23/2018 4:30:58 PM - Option 3 [View PDF](#)

Recommended: ☐

## ServiceTitan Estimate Is Populated with Selected Items from Sales Builder Pro

- A link to the PDF is included in the Summary
- Line item pricing within the description is a configuration setting that can be turned on/off in Sales Builder Pro



Name: Unspecified ...

Summary: SOLD: 02/23/2018 4:30:58 PM - Option 1 [View PDF](#)

Subtotal: \$7,240.00

Tax: \$0.00

Total: \$7,240.00

**Tasks**

Name	Description	Quantity	Unit Price	Total
61057_1_19_02/23/2018_4:30:58 PM	Equipment: Deluxe 16DS1618 Silver Series - Air Conditioner CHNC2417000 - Coil (Indoor Unit) Deluxe 21DS110120 Silver Series - Gas Furnace	1.00	\$7,240.00	\$7,240.00
Subtotal: \$7,041.00				
Accessories: 1 each - Deluxe 7-day Programmable - Thermostat - \$199.00				
Subtotal: \$199.00				
Materials: Line Set - \$0.00 Outdoor Pad - \$0.00 Disconnect - \$0.00 Electrical Wiring Whip - \$0.00				
Subtotal: \$0.00				
Total: \$7,240.00				

## **Appendix B – Additional Notes**

1. The Sales Builder Pro app receives customer and sales call (“job”) information from Service Titan. This information includes customer name, address, date and time of call.
2. A Comfort Consultant (“Technician” in Service Titan and “User” in Sales Builder Pro) is selected in Service Titan and dispatched using the normal Service Titan workflow.
3. Service Titan Technicians follow normal workflow protocols.
4. Sales Builder Pro Users accept the job and follow normal workflow protocols.
5. Sales Builder Pro Users create proposals containing up to three options. Each option may contain equipment, accessories, add-ons, and install materials.
6. Users complete each job in Sales Builder Pro to initiate transfer of data to Service Titan.
7. Each Sales Builder Pro Proposal Option (1, 2 or 3) created on the job is automatically converted into the same number of Service Titan estimates.
8. Each estimate contains one unique item or “service” in Service Titan.
9. The item description lists the HVAC equipment, accessories, add-ons, and materials selected for that proposal option. Price information is also transferred.
10. Contractors may elect to show or hide line item pricing – a one-time configuration choice.
11. The price for each estimate equals the total price of all HVAC equipment, accessories, add-ons, and materials selected for that proposal option.
12. The estimate summary on Service Titan includes a link to view the full PDF of the proposal as created on Sales Builder Pro.
13. If the proposal option was selected and signed by both the customer and sales rep, the word “SOLD” also appears in the summary.
14. Each estimate is created with an “Open” status and is then converted to a sale once all contingencies have been removed.

Note: Integration specifications subject to change as each platform evolves over time.