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	
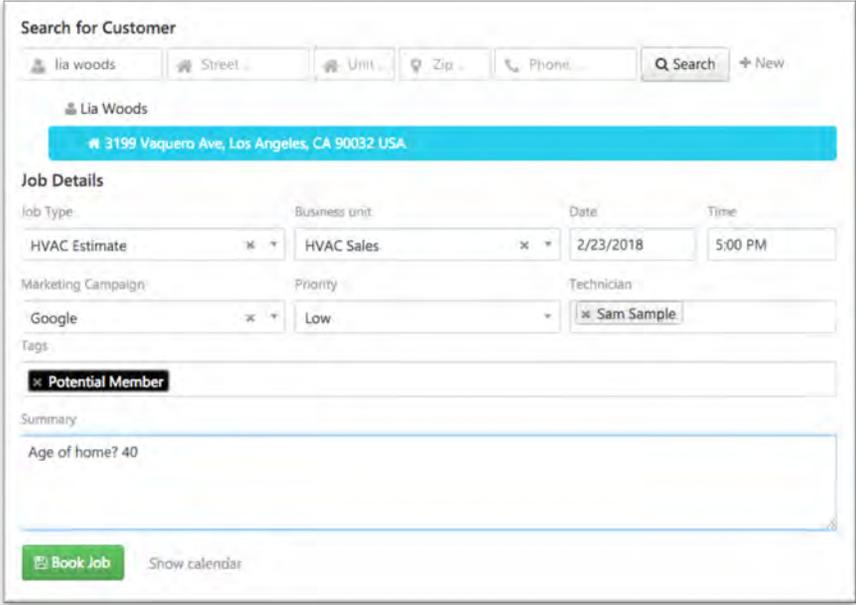
Customer and Job Information is Sent to Sales Builder Pro

• Sales Rep Accepts the job	
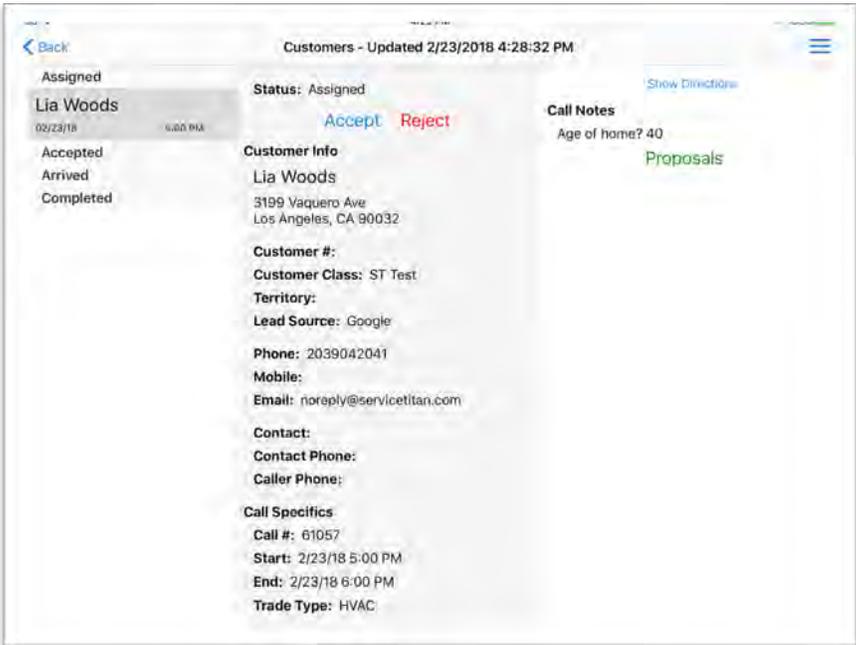
Configure Up to 3 Equipment Options in Sales Builder Pro

• Option 1 tab • Selecting HVAC Components	
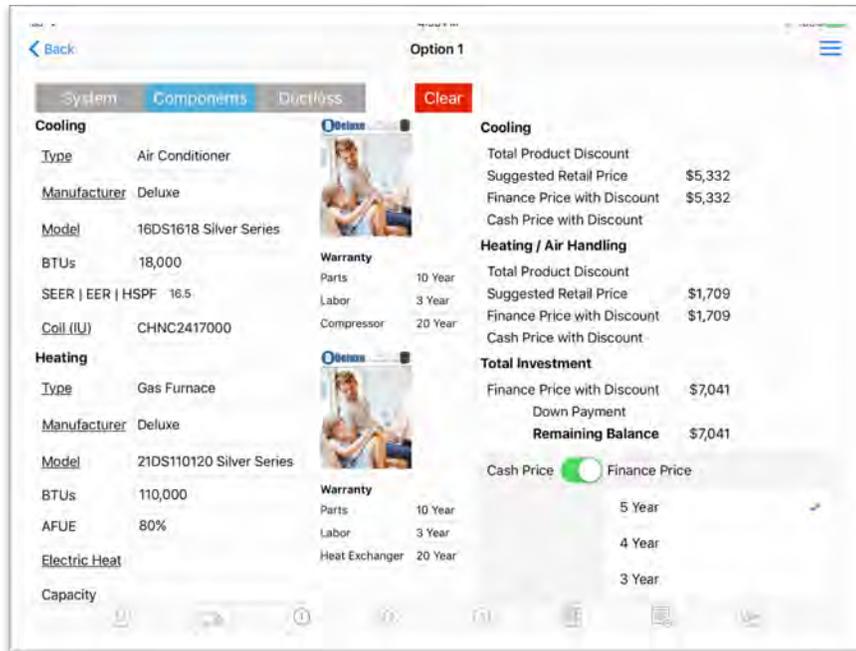
Option tab configures for matched HVAC **Systems**, units configured from **Components** or an exclusive **Ductless** tab designed for Mitsubishi Electric Zoned Comfort Solutions

Mitsubishi Electric Zoned Comfort Solutions "Ductless" tab includes layout and design considerations including	
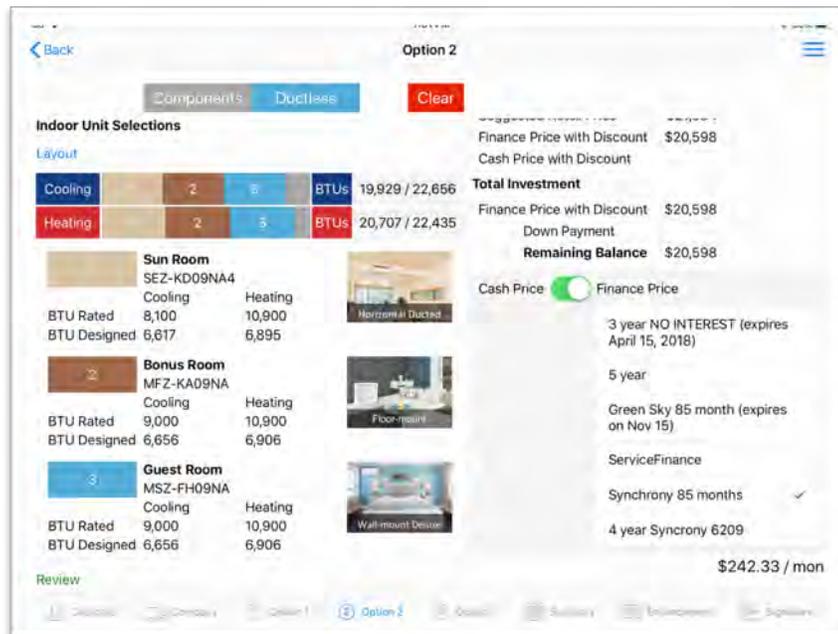
Select Accessories and Add-On Services

Typical Accessories include items such as

- Thermostats
- Humidity Controls
- Air Filters
- Air Cleaners
- Air Purifiers
- UV Lights
- Zoning Controls
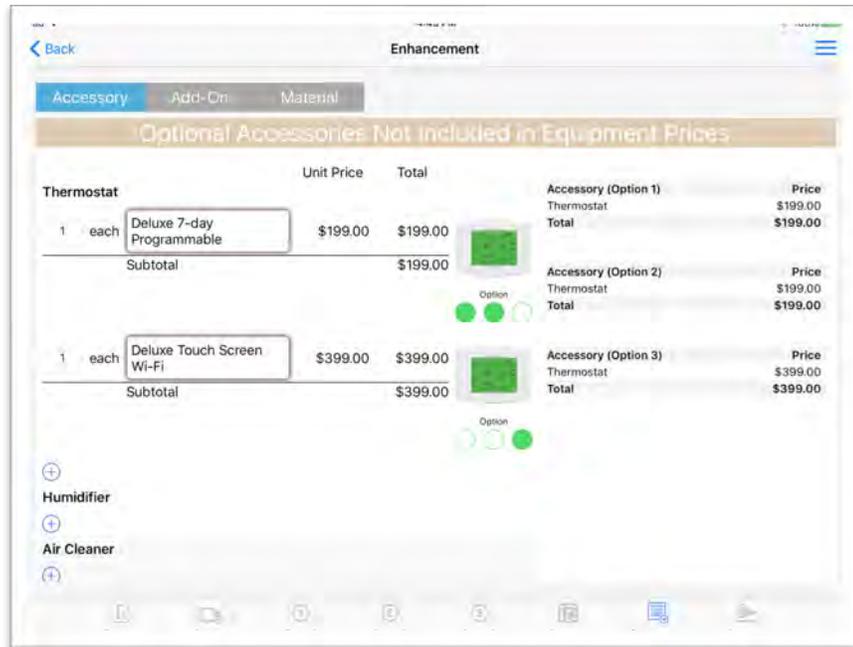
## Select Install Materials

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
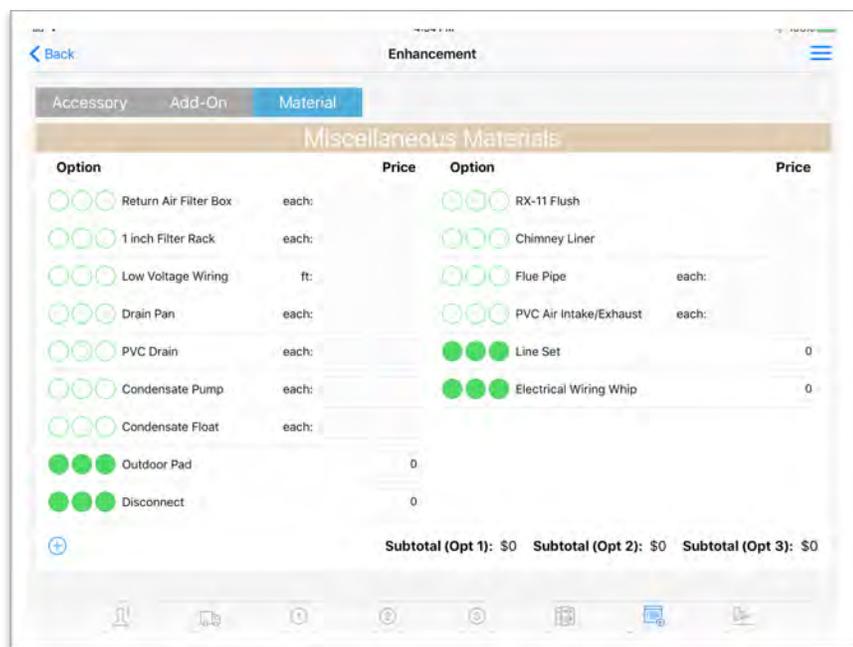
HVAC equipment Options are selected and the proposal is signed

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	
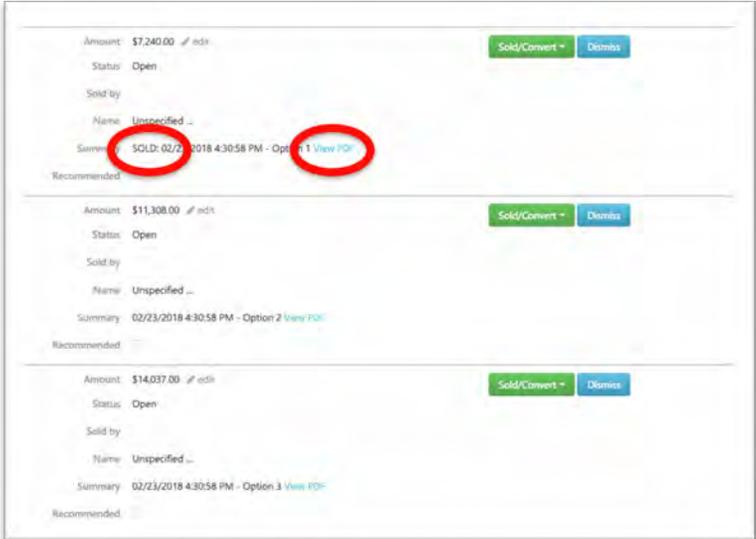
ServiceTitan Estimate Is Populated with Selected Items from Sales Builder Pro

• 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	
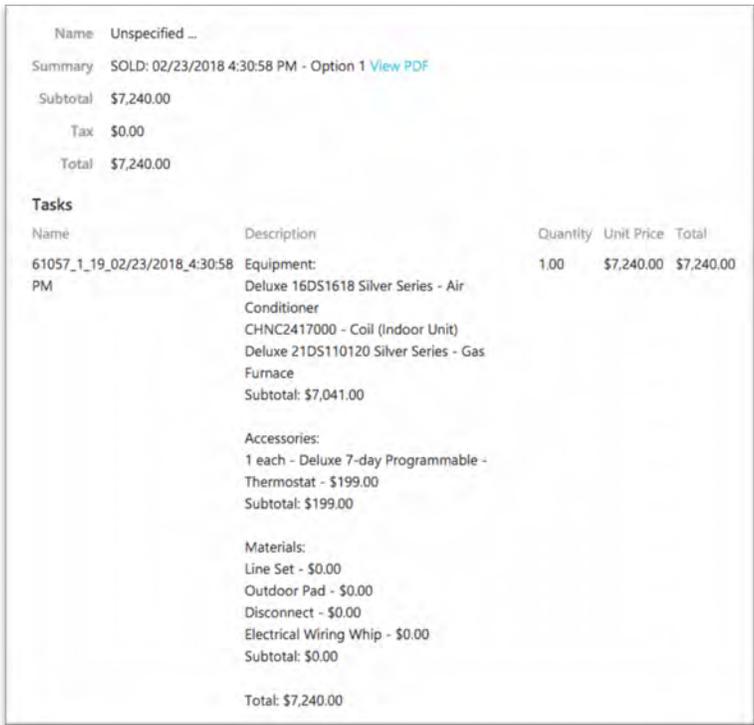
Appendix B – Additional Notes

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.