

# *Home Comfort Certified System®*



## **User Guide**

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# Table of Contents

WHAT IS FLAT RATE EQUIPMENT INSTALLATION PRICING? .....	3
WHY IS “FLAT RATE” PRICING BETTER THAN “QUOTED-BY-THE-JOB” PRICING? .....	3
WHY DO YOU NEED A FLAT RATE INSTALLATION PRESENTATION PRICE BOOK? .....	4
HOW DO YOU IMPORT THE HOME COMFORT DATA INTO ACCOUNTING OR DISPATCHING SOFTWARE?.....	4
WHY IS OUR SYSTEM THE LOWEST COST OPTION IN TIME AND MONEY? .....	5
HOW IS THE <i>HOME COMFORT CERTIFIED SYSTEM</i> PRICE BOOK MADE? .....	5
HOW DO YOU USE THE <i>HOME COMFORT CERTIFIED SYSTEM</i> PRICE BOOK? .....	7
WHAT IS THE LAYOUT OF THE <i>HOME COMFORT CERTIFIED SYSTEM</i> PRICE BOOK? .....	10
FILLING OUT THE “HOME COMFORT SET-UP AND ORDER ENTRY FORM” .....	11
INSTALLATION LABOR .....	11
VEHICLE / MISCELLANEOUS .....	11
GEOTHERMAL WELL SUBCONTRACTOR .....	12
GEOTHERMAL ELECTRICAL SUBCONTRACTOR .....	12
CUSTOMER UTILITY RATES .....	12
HEATING & COOLING LOAD HOURS .....	13
CUSTOMER FINANCING INTEREST RATES .....	13
PROFIT MARGIN .....	13
COMPANY INFORMATION .....	13
<b>APPENDICES .....</b>	<b>14</b>
APPENDIX A – SELECTING THE GOOD-BETTER-BEST-PREMIUM SYSTEM CONFIGURATIONS .....	14
APPENDIX B – INSTALLATION COSTING FOR EACH SYSTEM CONFIGURATION .....	16
<i>Split Air Conditioning with Furnace</i> .....	16
<i>Split Air Conditioning with Electric Heat</i> .....	16
<i>Split Air Conditioning Add-on</i> .....	17
<i>R22 Dry-Charged Air Conditioning Condenser or Heat Pump Only</i> .....	17
<i>Split Heat Pump</i> .....	18
<i>Split Dual Fuel (or ‘Hybrid System’)</i> .....	19
<i>Geothermal Packaged Heat Pump</i> .....	19
<i>Geothermal Split System Heat Pump</i> .....	20
<i>Packaged AC / Gas Heat</i> .....	21
<i>Packaged AC / Electric Heat</i> .....	21
<i>Packaged Heat Pump</i> .....	22
<i>Packaged Dual Fuel</i> .....	22
<i>Furnace Only</i> .....	23
<i>Boiler Only</i> .....	23
<i>Air Handler/Fan Coil or Indoor Coil Only</i> .....	23
APPENDIX C – ENHANCEMENTS, ACCESSORIES & IAQ ESSENTIALS.....	25
APPENDIX D – SPREADSHEET 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 EQUIPMENT INSTALLATION PRICING?

Flat rate equipment 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.

## WHY IS “FLAT RATE” PRICING BETTER THAN “QUOTED-BY-THE-JOB” PRICING?

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

## WHY DO YOU NEED A FLAT RATE INSTALLATION PRESENTATION PRICE BOOK?

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

4. 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.
5. Not being able to afford the high cost that can typically run from \$1500 - \$3500 upfront with an additional \$65+/month per book.
6. Poor business/pricing understanding.
7. 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:

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

## HOW DO YOU IMPORT THE HOME COMFORT 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 – Spreadsheet Table for Upload to Dispatching and/or Accounting Software” on page 26 for more details about this upload file.

## **WHY IS OUR SYSTEM THE LOWEST COST 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.
3. Tend to be very pricey, at up to 35 times higher than our flat rate option.
4. Have monthly fees that tend to be much higher than our flat rate option.

### On the other hand, our flat rate price book requires:

1. A simple 1-page set-up sheet.
2. Simple system configuration set-up using a spreadsheet or other convenient methods.
3. No database maintenance; we maintain the book for you.
4. A small investment which is typically recovered on your very first sales call.
5. No software aside from any PDF document reader. (See “Important Notice” 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, state sales tax rate, and (optional) local utility energy rates and financing rates. (For details 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 them.
- d. Why your company must set the standards of performance in your area.
- e. The quality they can expect before, during, and after the installation.

- f. How you will be sitting down with 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 customize the labor hours built into each system installation type. Please see "Appendix B – Installation Costing for each System Configuration" on page 16. Furthermore, we can also include your company logo on the cover page and customize wording for you in any section of your price book. Any customizations we make for you will be saved for future updates to your price book.

We allow up to 20 text changes or global word/phrase replacements or any combination thereof. If you require changes beyond the initial 20, 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.

You will be asked to specify the equipment you offer in the good-better-best-premium system configurations. We can change these for you at no additional cost. Please see "Appendix A – Selecting the Good-Better-Best-Premium System Configurations" on page 14. Any changes we make for you to your system configurations will be saved for future updates to your price book.

The only caution we give to new users of the price book who want to make changes is to not try to 'reinvent the wheel'. However, once you have decided what changes and customizations are needed for your company then simply print out the pages that need changes and clearly write your changes on these pages. Then fax these marked up pages to us at 603-386-6342.

If you wish, we can provide the additional service of printing your Home Comfort Certified System price books for you and assembling them into ½" 3-ring white binders with tabbed sections. We will provide a quote for this, along with US Postal standard shipping costs, prior to performing any work. This quote and a credit card authorization form will be sent to your email address for approval.

If no price book customizations are required, 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 from receipt of your marked-up page edits.

If you are seeking to professionalize your selling process, then please visit our website at [www.GrowMyHVAC.com](http://www.GrowMyHVAC.com) and check out our Ready-Built HVAC Contracting Systems 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 training tracks are sold separately. The "Residential Installation" training tracks include the 'Professional One-Call Sales Call Handling Process', scripts, and associated customer and installation scope survey forms, as well as complete, written, best-practice, installation delivery standards from the initial lead to job close-out.

## 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. The steps below that are **in bold** indicate where and how our *Home Comfort Certified System* price book is used during the sales call. You can find more detailed information on the non-bold steps below in the "Ready-Built HVAC Residential Installation Department" training track located at [www.GrowMyHVAC.com](http://www.GrowMyHVAC.com). Steps 1–14, 23 and 24 are directed toward your Comfort Advisor or selling technician. Other company departments will be involved in the remaining steps.

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.

**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 by using the built-in 4 professional sales call handling presentation of:

- ✓ Giving the customer a compelling reason to buy from you by reviewing first 4-pages with customer:
  1. Who you and your company are? What makes you different?
  2. The process you will be using to find the best solution for them.
  3. Why your company must set the standards of performance in your area.
  4. What the customer can expect before, during, and after the installation.
- ✓ **Post Survey Review with the customer** – To verify system replacement "scope of work" and customer pricing requirements, review with the customer the completed survey form, (If an active Ready-Built HVAC Program subscriber, our *Home Use and Livability Survey Form*), and the present situation versus their needs/wants *Home Use and Livability Survey Form*. Get the customer's agreement on the *Survey's* 5-key category findings and solutions.
  1. Home Use requirements
  2. Comfort requirements
  3. Health/Safety requirements
  4. Property requirements
  5. Financial requirements

- ✓ Perform “Manual J” load calculation – Then ask permission to proceed with a system load analysis. While you are performing the load calculation, you hand your Home Comfort “Why You Have to Set the Standards of Performance in the Area” page 4, to the customer, and explain that you have included actual pictures of the area poor installations, as well as, some of your company’s past installations they can look at.
- ✓ Verify Scope of Work – You then review your findings with the customer and verifying any additional work or any enhancement options required that you discovered during Survey.
- ✓ Finalize Pricing - you select your “best” option from your Home Comfort pricing section, the equipment component by size(s) and efficiency(s), and verifying with customer any additional work required, an or any enhancement options discovered during Survey.
- ✓ 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. Include any rebates you are offering; make use of the Rebate Pricing Companion.
  - e. Add up these prices up and enter the customer’s total investment after rebate.
  - f. Write the customer’s estimated monthly savings using the *Energy Savings* tables.
  - g. On the *Finance Tables*, you find a closest home equity monthly payment to the estimated energy savings amount.
  - h. Calculate and enter the customer’s net monthly cost of ownership.
- ✓ Review hoe affordable the recommended investment – Review each investment line-item and associated benefits. Then obtain permission (your first trial close) to proceed with preparing a proposal.
- ✓ 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. Reading 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.
- ✓ Close the Sale – The customer makes the minimum deposit at time of signing to secure the installation.
- ✓ 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
- ✓ If sold, Job turnover to operations – Complete the job booking documents and turn the job over to the Installation Manager for execution:
  - a. Place executed agreement inside
  - b. Place completed Install-Right Solution Survey form inside (see Ready-Built Program)
  - c. Mechanical Code Checklist form inside (see Ready-Built Program)
  - d. Job File Folder: Check off that each booking item is complete (see Ready-Built Program)
    - i. Enter rebates and discounts where shown
    - ii. Enter copper sizes



- iii. Enter breaker sizes
  - iv. Make sure to take CLEAR all the pictures as itemized
  - v. Selling tech - can take pictures of contract & cover of job folder and forward to Installation Manager
- ✓ Equipment Ordered and Installation Scheduled – The Installation Manager orders equipment, materials and supplies and schedules installation. (see Ready-Built Program)
  - ✓ Complete the Installation Work Order - The Installation Manager completes the Installation Work Order and communicate directly with the assigned Crew Chief job site pictures, booking documentation and Installation Work Order. (see Ready-Built Program)
  - ✓ Process MFG and Utility Rebates - The Installation Manager/Scheduler completes and submits rebate paperwork.
  - ✓ 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)
  - ✓ Installation coordinated with the customer – The Installation Coordinator calls the customer to set up a time. (see Ready-Built Program)
  - ✓ Job staging and mobilization – The Installation Manager/Scheduler/Crew Chief pull all equipment and materials and makes them ready for the Installation Crew and prior to arrival at the customer’s home, minimizing any comfort or use disruptions. (see Ready-Built Program)
  - ✓ Field Communication Documentation created – The Installation Manager creates the field communication and installation instructions. (see Ready-Built Program)
  - ✓ 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.
  - ✓ Payment – 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.
  - ✓ 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)
  - ✓ Final payment – The final payment is due upon the signing of the final invoice and prior to the departure of the Installation Crew. If the customer cannot be present upon completion, they must sign the final invoice and provide payment before departing.
  - ✓ 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)
  - ✓ 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*?

The sections we provide in the price book you will receive are shown **in bold** below. We highly recommended that you also add the information described in the non-bold sections. These are included in our "Ready-Built HVAC Residential Installation Department" training track located on our website at [www.GrowMyHVAC.com](http://www.GrowMyHVAC.com).

1. Cover Page – Presents your company's name and address and will display the logo of the equipment brand used in your price book. (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 you and your company are? What makes you different?
5. The process you will be using to find the best solution for them.
6. Top 10% Success - Why your company must set the standards of performance in your area.
7. Commitment - What the customer can expect before, during, and after the installation.
8. What the customer can expect before, during, and after the installations.
9. Pricing – Presented here are the flat rate prices of your company's:
  - a. 4-options within each of your configurations by size and efficiency.
  - b. Enhancements, Accessories, & IAQ Essentials.
10. Investment Option Worksheet - This worksheet enables you to itemize and present the recommended replacement option(s) that best meet the customer's requirements and illustrates affordability.
11. Rebate 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.
12. Quick Job Pricing Table - This worksheet enables you to quickly identify adjust price of any added work where you know the total labor hours and materials cost to complete resulting in pricing add(s) at the same rates as your price guide financial set-up.
13. Energy Savings Tables– These Home Comfort Energy Savings tables enables 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.
14. Finance Tables - These Home Comfort Finance tables demonstrate what your customer's estimated net monthly payment would be.
15. 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. 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 of course customize any or all the remaining data entry points, but if you don’t then we will default to the industry standard shown, or determine the value based on your region of the country. The financing rates and utility costs are optional and do not affect the prices of the systems in your book. However, they are great selling enhancement tools.

### Installation Labor

1. **Crew Chief Labor Rate:** Write the actual hourly dollar rate of your highest paid installation department Crew Chief without benefits for non-union workers. (If you are a union company, then write the hourly rate paid including benefits. Benefits for non-union workers are included in department overhead on Line 25.)
2. **Helper Labor Rate:** Write the actual hourly dollar rate of your highest paid installation department Helper without benefits for non-union workers. (If you are a union company, then write the hourly rate paid including benefits. Benefits for non-union workers are included in department overhead on Line 25.)
3. **Billable Efficiency (Default – 60%):** Write the actual 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. Industry efficiency for installers is about 60% efficient. (If your company policy is to only pay your installation team for time they bill to a job then this value would be 100%.)

### Vehicle / Miscellaneous

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 expense 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 (on average 12 mpg).  
*Example:* If you pay \$3.00 per gallon of gas, then divide it by 12 mpg to obtain a \$0.25 per mile

fuel rate. Then add the depreciation per mile of \$0.22 and that adds up to your Travel Cost per Mile of \$0.47.

7. Hourly Truck Charge \$ (Default – \$4.80): This value is your cost per working hour for the vehicle lease or mortgage and the vehicle maintenance costs. To calculate this: Find the annual cost for lease payments and maintenance, then divide this by the number of billable weeks in a year (typically 48 due to vacations and holidays), then dividing this by the number of billable hours in a week (typically 24, or a 60% work efficiency factor). Another way to estimate this is if your entire fleet is leased, then this will be about \$12/hr. If only 40% of the fleet is leased or has mortgage, then this will be about \$4.80/hr. It is recommended that you obtain this value from your comptroller, if possible.
8. Risk & Proficiency & Warranty % (Default – 4.00%): Not all jobs run smoothly due to equipment or material purchase errors or failures, and not all jobs are installed efficiently depending on the competencies and work efficiencies of the Installation Crew. The average risk loss due to errors is about 2% of job costs and the average labor proficiency loss is also 2%. This adds up to a “stuff happens” total adjustment of 4% which we include in the installation price. This will also cover the cost of labor should there be call backs or warranty service calls within the first year. You should provide a risk and proficiency adjustment percentage, if known.

### **Geothermal Well Subcontractor**

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 19.)

9. 1.5 to 2 Ton Geothermal: Enter the subcontractor fee for loop installation.
10. 2.5 Ton Geothermal: Enter the subcontractor fee for loop installation.
11. 3 Ton Geothermal: Enter the subcontractor fee for loop installation.
12. 3.5 Ton Geothermal: Enter the subcontractor fee for loop installation.
13. 4 Ton Geothermal: Enter the subcontractor fee for loop installation.
14. 5 Ton Geothermal: Enter the subcontractor fee for loop installation.
15. 6 Ton Geothermal: Enter the subcontractor fee for loop installation.

### **Geothermal Electrical Subcontractor**

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

### **Customer Utility Rates**

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.
19. Propane per Gallon: If you install equipment for customers who use LP Gas then enter the local rate in dollars per gallon.
20. Fuel Oil per Gallon: If you are offering fuel oil-fired equipment in your price book then enter the local rate in dollars per gallon.

## Heating & Cooling Load Hours

21. Annual Heating Load Hours: Enter your local heating load hours (not heating degree days). If unknown, we will look up the value for your general region of the country.
22. Annual Cooling Load Hours: Enter your local cooling load hours (not cooling degree days). If unknown, we will look up the value for your general region of the country.  
If not heating or cooling load hours are not known, simply enter question mark “?” in the cells and we will look up ARI table for your load local hours.

## Customer Financing Interest Rates

23. Home Equity Loan Rate (Default – 2.99%): Enter the average local home equity loan interest rate. This can be obtained from your local bank.
24. Local Bank Loan Rate (Default – 3.13%): Enter the average standard bank loan interest rate here. This can be obtained from your local bank.

## Profit Margin

25. Installation Dept. Overhead % (Default – 25%): Enter the overhead cost 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 20-30%. (Please note: If you use an installation sub-contractor then this value will be much lower, typically from 10-20%.)
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 tech provides lead but does not sell, typical to enter 2% commission. If selling tech who also properly books job per company standards, typical is 4% commission. If comfort advisor, typical to enter range 8-10%.
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 10-15%.
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 gross profit margin you desire to recover overhead, pay commissions and achieve net profits before taxes. The typical range, when not using an installation sub-contractor, is 40%-50%.

## Company Information

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.

## IMPORTANT NOTICE:

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 select DOWNLOAD or SAVE. Then save the PDF file to your computer.

If you are experiencing problems opening your price book file, it may be that you do not have a PDF document reader installed on your computer.

There are many options of free 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(s). This is your decision and done at your own risk. But it is necessary to have something on your computer(s) that can open PDF files to make use of the book we produce.

## APPENDICES

### Appendix A – Selecting the Good-Better-Best-Premium System Configurations

The price book is designed to present up to four grades, Good-Better-Best-Premium, for each system configuration. We will provide you with a Microsoft Excel worksheet for you to indicate your Good, Better, Best, and Premium system equipment choices and costs. The completed worksheet can then be emailed to us at [CustomerCare@growmyhvac.com](mailto: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. R22 Dry-Charged 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

Fill in the data for each configuration that you wish to offer in your price book. For configurations you do not want to offer, simply write “remove” on the first tab in the worksheet next to any system you do not sell. Most of our clients spend less than an hour setting up the system configurations for their price book. (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 companies in two different general climate zones might select equipment for the Split Air Conditioning with Furnace configuration.

1. Typical southern climate configuration:

- 20. Good: 14 SEER 80% AFUE Non-Programmable Tstat
- 21. Better: 16 SEER 80% AFUE Programmable Tstat
- 22. Best: 18 SEER 2-Stage 80% 2-Stage or 90% AFUE Deluxe Prog Tstat
- 23. Premium: 20+ SEER 2-Stg or Var-Capacity Communicating Controller 90% AFUE 2-Stage

2. Typical northern climate configuration:

- 24. Good: 13 SEER 80% AFUE Non-Programmable Tstat
- 25. Better: 14 SEER 90% AFUE Programmable Tstat
- 26. Best: 16 SEER 2-Stage 95% AFUE 2-Stage Deluxe Prog Tstat
- 27. Premium: 18 SEER 2-Stg or Var-Capacity Communicating Controller 95+% AFUE Modulating

Below is an example of one of our client's Good-Better-Best-Premium configuration worksheets that they set up based on their unique needs, preferred equipment line and geographic region.

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	\$ 325.17	TCONT402	\$ 71.74	4TRR3018H1000N	\$ 712.26	TUD1A040A9241A	\$ 739.34
	2	4PXCAU24BS3HAA	\$ 325.17	TCONT402	\$ 71.74	4TRR3024H1000N	\$ 753.95	TUD1A060A9241A	\$ 773.23
	2.5	4PXCBU30BS3HAA	\$ 337.41	TCONT402	\$ 71.74	4TRR3030G1000N	\$ 842.52	TUD1B080A9361A	\$ 832.26
	3	4PXCBU36BS3HAA	\$ 337.41	TCONT402	\$ 71.74	4TRR3036G1000N	\$ 947.44	TUD1B080A9361A	\$ 832.26
	3.5	4PXCCU42BS3HAA	\$ 397.28	TCONT402	\$ 71.74	4TRR3042D1000N	\$ 1,044.24	TUD1C100A9481A	\$ 881.98
	4	4PXCDU48BS3HAA	\$ 487.07	TCONT402	\$ 71.74	4TRR3048D1000N	\$ 1,144.18	TUD1D120A9601A	\$ 933.12
5	4PXCDU60BS3HAA	\$ 519.73	TCONT402	\$ 71.74	4TRR3060D1000N	\$ 1,340.40	TUD1D140A9601A	\$ 976.19	
BETTER	1.5	4PXCAU24BS3HAA	\$ 325.17	TCONT624	\$ 135.37	4TRR6018J1000A	\$ 1,130.03	TUD2A040A9242A	\$ 929.59
	2	4PXCAU24BS3HAA	\$ 325.17	TCONT624	\$ 135.37	4TRR6024J1000A	\$ 1,146.48	TUD2A060A9362A	\$ 963.58
	2.5	4PXCBU30BS3HAA	\$ 337.41	TCONT624	\$ 135.37	4TRR6030J1000A	\$ 1,283.21	TUD2B080A9362A	\$ 1,067.74
	3	4PXCBU36BS3HAA	\$ 337.41	TCONT624	\$ 135.37	4TRR6036J1000A	\$ 1,448.63	TUD2B080A9362A	\$ 1,067.74
	3.5	4PXCCU42BS3HAA	\$ 397.28	TCONT624	\$ 135.37	4TRR6042J1000A	\$ 1,624.62	TUD2C100A9482A	\$ 1,077.34
	4	4PXCDU48BS3HAA	\$ 397.28	TCONT624	\$ 135.37	4TRR6048J1000A	\$ 1,762.50	TUD2C120A9542A	\$ 1,114.02
5	4PXCDU60BS3HAA	\$ 519.73	TCONT624	\$ 135.37	4TRR6060J1000A	\$ 1,866.67	TUD2D140A9602A	\$ 1,167.95	
BEST	1.5								
	2	4TXCA002DS3HCAA	\$ 401.49	TCONT824	\$ 223.61	4TTX8024A1000A	\$ 2,169.08	TUD2B060A9V3VB	\$ 1,225.00
	2.5								
	3	4TXCB004DS3HCAA	\$ 414.93	TCONT824	\$ 223.61	4TTX8036A1000A	\$ 2,430.64	TUD2B080A9V3VB	\$ 1,265.28
	3.5								
	4	4TXCC007DS3HCAA	\$ 480.60	TCONT824	\$ 223.61	4TTX8048A1000A	\$ 2,761.56	TUD2C100A9V5VB	\$ 1,468.62
5	4TXCD010DS3HCAA	\$ 614.93	TCONT824	\$ 223.61	4TTX8060A1000A	\$ 3,072.25	TUD2D140A9V5VB	\$ 1,538.46	
PREMIUM	1.5								
	2	4TXCB003DS3HCAA	\$ 414.93	TZONE950AC52ZA	\$ 376.22	4TTV0024A1000A	\$ 3,580.95	TUD2B080ACV32A	\$ 1,497.28
	2.5								
	3	4TXCB004DS3HCAA	\$ 414.93	TZONE950AC52ZA	\$ 376.22	4TTV0036B1000A	\$ 4,430.91	TUD2B080ACV32A	\$ 1,497.28
	3.5								
	4	4TXCD008DS3HCAA	\$ 579.10	TZONE950AC52ZA	\$ 376.22	4TTV0048A1000A	\$ 4,039.39	TUD2D120ACV52A	\$ 2,123.76
5	4TXCD010DS3HCAA	\$ 614.93	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 four components (or six for geothermal systems) as shown below. Although we use industry standard installation hours, 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](mailto:CustomerCare@growmyhvac.com) with subject line to read: "Please send current miscellaneous installation materials and supplies costs."

### SPLIT AIR CONDITIONING WITH FURNACE

(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 (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, supplies and tasks:
  - 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 Billable Efficiency 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: Options in this configuration include not having 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, supplies and tasks:
 

a. New equipment mounting pad, leveled	g. Refrigerant recovery
b. New condensate drain line	h. Gases for soldering and pressure testing
c. New electrical disconnect	i. Various copper fittings
d. New power wire, disconnect to equipment	j. Vacuum pump usage & maintenance
e. New transitions to existing plenums	k. Refrigerant to top off the system
f. New refrigerant line-set up to 30ft	
  
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your Billable Efficiency factor (*unless you are using an installation sub-contractor*):
 

a. Remove old equipment	1 hour
b. Set Outdoor Unit	1-4 hours ( <i>1.5 to 3.5 ton: 1 hour; 4 &amp; 5 ton: 4 hours</i> )
c. Set Fan Coil, install Tstat	1.5 hours
d. Install and connect line-set	1.5 hours
e. <u>Start-up, Test and Verify</u>	<u>1 hour</u>
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, supplies and tasks:
 

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 Billable Efficiency factor (*unless you are using an installation sub-contractor*):
 

a. Remove old equipment	1 hour
b. Set Outdoor Unit	1-4 hours ( <i>1.5 to 3.5 ton: 1 hour; 4 &amp; 5 ton: 4 hours</i> )
c. Set Evap Coil, install Tstat	1 hour
d. Install and connect line-set	1.5 hours
e. <u>Start-up, Test and Verify</u>	<u>1 hour</u>
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*.

### **R22 DRY-CHARGED AIR CONDITIONING CONDENSER OR HEAT PUMP ONLY**

(Note: An option in this configuration is to use R410A charged outdoor units. They would be in a separate page from R22 units.)

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, supplies and tasks:
 

a. New equipment mounting pad, leveled	f. Soldering and pressure testing gases
b. New snow riser pump-ups (for HPs)	g. Various copper fittings
c. New electrical disconnect	h. Vacuum pump usage & maintenance
d. New power wire, disconnect to equipment	i. R22 refrigerant to charge the system (or R410A to top off the system)
e. Refrigerant recovery	
3. Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your Billable Efficiency factor (*unless you are using an installation sub-contractor*):
 

a. Remove old equipment	1 hour
b. Set Outdoor Unit	2-4 hours ( <i>1.5 to 3.5 ton: 2 hours; 4 &amp; 5 ton: 4 hours</i> )
c. Install Tstat	0.5 hours
d. <u>Start-up, Test and Verify</u>	<u>1 hour</u>
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: Options in this configuration include using an indoor coil instead of a fan coil. This is useful as an add-on or replacement system 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, supplies and tasks:
 

a. New equipment mounting pad, leveled	g. New refrigerant line-set up to 30ft
b. New snow riser pump-ups	h. Refrigerant recovery
c. New condensate drain line	i. Gases for soldering and pressure testing
d. New electrical disconnect	j. Various copper fittings
e. New power wire, disconnect to equipment	k. Vacuum pump usage & maintenance
f. New transitions to existing plenums	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 Billable Efficiency factor (*unless you are using an installation sub-contractor*):
 

a. Remove old equipment	1 hour
b. Set Heat Pump Unit	1-4 hours ( <i>1.5 to 3.5 ton: 1 hour; 4 &amp; 5 ton: 4 hours</i> )
c. Set Fan Coil, Install Tstat	1.5 hours ( <i>or 1 hour for Indoor Coil and Tstat</i> )
d. Install and connect line-set	1.5 hours
e. <u>Start-up, Test and Verify</u>	<u>1 hour</u>
f. TOTAL CREW-HOURS	6 - 9 hours ( <i>or 5.5 – 8.5 hours for Indoor Coil</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*.

## SPLIT DUAL FUEL (OR 'HYBRID SYSTEM')

(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 (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, supplies and tasks:
  - 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 (*unless you are using an installation sub-contractor*):
  - a. Remove old equipment 1 hour
  - b. Set Heat Pump Unit 2-4 hours (1.5 to 3.5 ton: 2 hours; 4 & 5 ton: 4 hours)
  - c. Set Indoor Coil 2 hours
  - d. Set Furnace, install Tstat 4.5 hours
  - e. Install and connect line-set 1.5 hours
  - f. Start-up, Test and Verify 1 hour
  - g. TOTAL CREW-HOURS 12 - 14 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*.

## 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, supplies and tasks:
  - 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
  - o Installing water loop
  - o Filling water loop with environmentally friendly antifreeze/water solution
  - o Connecting water loop to pump pack
  - o 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 Billable Efficiency 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*.

### **GEOHERMAL 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, supplies and tasks:
 

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 Billable Efficiency 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 (1.5 to 3.5 ton: 3 hours; 4 to 6 ton: 5 hours)  |
| d. Set Indoor Unit                  | 3 hours (plus 4 hours if installing Furnace)  |
| 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> | <u>2 hours</u>  |
| i. TOTAL CREW-HOURS                 | 14.5 - 16.5 hours (or 18.5 – 20.5 if installing Furnace)<br>(plus 2 hours for venting of 90%+ furnaces) |

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

- 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.
- Industry standard costs for the following materials, supplies and tasks:
 

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
- Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your Billable Efficiency 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. <u>Start-up, Test and Verify</u>	<u>1 hour</u>
e. TOTAL CREW-HOURS	6 - 8 hours
- 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

- 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.
- Industry standard costs for the following materials, supplies and tasks:
 

a. New equipment mounting pad, leveled	d. New transitions to existing plenums
b. New electrical disconnect	e. Refrigerant recovery
c. New power wire, disconnect to equipment	
- Industry standard Labor Crew-Hours as shown below for one Crew Chief and one Helper, adjusted by your Billable Efficiency 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, supplies and tasks:

- 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 Billable Efficiency 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, supplies and tasks:

- 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 Billable Efficiency 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, supplies and tasks:
  - 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 Billable Efficiency 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, supplies and tasks:
  - 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, supplies and tasks:
  - 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 Billable Efficiency 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 will 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:

28. Brand and model number of the item
29. Your cost of the item
30. The total of miscellaneous materials that will be needed to install the item
31. The total crew-hours to install the item and verify operations.

## Appendix D – Spreadsheet Table for Upload to Dispatching and/or Accounting Software

In addition to the PDF version of your book, there is also an option for you to receive a spreadsheet in CSV 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](mailto:CustomerCare@growmyhvac.com). Here is an explanation of the data contained in each of the nine columns of this optional spreadsheet:

1. **Code:** A 9-digit code that will be unique for each installation in your price book.  
*Example:* H051-GD35
2. **Description:** The page heading plus whether the system is “Good”, “Better”, “Best” or “Premium” plus the size of the system.  
*Example:* Split Heat Pump with Fan Coil Good System 3.5 Ton Size
3. **Retail\_ \$:** The price in dollars for the system installation as shown to your customers in the PDF version of the book.  
*Example:* 7104
4. **Eqp/Mtl/Sub\_ \$:** The cost in dollars you provide for equipment, miscellaneous materials, and subcontractors.  
*Example:* 3059.61
5. **Sales\_Tax\_ \$:** The total in dollars for sales tax on equipment and materials, calculated using what you put in Line 4 of the *Home Comfort Set-up and Order Entry Form*.  
*Example:* 214.17
6. **Labor\_Hrs:** The number of crew-hours for the installation, calculated using what you put in 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
7. **Labor\_Cost\_ \$:** The cost in dollars for labor for the installation, calculated using what you put in Lines 1, 2, and 3 of the *Home Comfort Set-up and Order Entry Form*.  
*Example:* 385.14
8. **Risk\_Prof\_ \$:** The portion of the installation price in dollars assigned to Risk & Proficiency & Warranty, calculated using the % of the total installation cost that you put in Line 8 of the *Home Comfort Set-up and Order Entry Form*. Industry average is 4 %, 2% risk and warranty plus 2% proficiency.  
*Example:* 149.97
9. **Gross\_Profit\_ \$:** The portion of the installation price in dollars that is gross profit, calculated using what you put in 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

If you do not have the optional spreadsheet table described on page 26, then below is an easy 3-step calculation for you to quickly identify your job costs for any system installation based on the presentation price in your price book.

**Step #1:** Find the *Total System Installation Costs*.

You will need the system installation presentation price in your price book and your Total GPM rate found on Line 28 in the last page of the PDF version of your price book.

To calculate: Multiply the presentation price by 1 minus your Total GPM Rate.

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

**Step #2:** Find the *Installation Labor Cost*.

You will need the *Total System Installation Crew-Hours* (found in the details of the appendix starting on page 16), and, from the last page of the PDF version of your price book, the hourly rates you pay your Crew Chief and Helper found on Lines 1 and 2 and the Billable Efficiency found on Line 3.

To calculate: Multiply the *Crew-Hours* by the *Billable Efficiency* by combined total of your *Crew Chief Labor Rate* and your *Helper Labor Rate*.

$$\text{LABOR COST} = \text{HOURS} \times \text{BE} \times (\text{Crew Chief RATE} + \text{Helper RATE})$$

**Step #3:** Find the *Total System Equipment, Materials, Supplies, Extended labor warranty fee and Sub-contractor fee Cost*.

To calculate: Take the results of Step #1 and subtract the results of Step #2.

$$\text{MAT'L/EQUIP/FEES COST} = \text{TOTAL COSTS} - \text{LABOR COST}$$