EasyPrice™ User Guide

Service Agreement Estimating & Pricing Program
Commercial/Industrial/Healthcare HVAC Maintenance

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For Microsoft Excel 2016, 2019, and Microsoft 365

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1. What EasyPrice Does

EasyPrice is a Microsoft Excel program that builds the cost and selling price of a commercial HVAC planned maintenance or service agreement. You describe the customer's equipment, choose the level of coverage, and enter your own labor, travel, and margin numbers. EasyPrice does the rest: it calculates the inspection, repair, filter, and special service hours and materials for every piece of equipment, adds travel, applies your gross profit margins, and produces a Year 1 annual price with Years 2 through 5 escalated automatically.

What is built in

- **92 equipment types** in 56 data tables, from rooftop package units and split systems through chillers, cooling towers, boilers, unit heaters, make-up air, air handlers, pumps, terminal units, refrigeration, ice machines, and pneumatic and DDC control devices.
- **Standard maintenance data for each size:** number of annual and operational inspections, labor hours and materials per inspection, annual repair labor hours and repair material allowance, and filter size, type, and quantity.
- **Room for 20 equipment groups** per estimate, 20 special services, and 4 subcontractor or rental lines.
- **Fiber and pleated filter price lists** you can update with your own costs.
- **Three coverage levels:** Inspection Only, Full Labor, and Full Service (labor and parts).
- **Five-year pricing** with your own annual escalation rates.

How the estimate flows

You enter information on four tabs. EasyPrice carries it through hidden calculation sheets to two review tabs:

Step	What happens
1. Financial Set-up	Your customer details, labor rates, travel costs, taxes, margins, and escalation.
2. Equipment Services	The equipment list, sizes, quantities, coverage, and adjustments.
3. Filters	Filter labor and materials, calculated automatically; review and adjust.
4. Special Services	Any extra services not covered by the equipment tables.
5. Recap Estimate	Hours and materials by equipment group and service (review only).
6. Estimate & Pricing Summary	Costs, margins, and the Year 1 to Year 5 selling prices (review only).

2. Before You Start

1. **Save a clean master copy.** Before entering any data, save the file as **EASYPRICE MASTER** and keep it unchanged.
2. **Save each estimate as its own file,** named by customer and revision date, for example **Riverside Medical 2026-10-19**. Open the master, then use File, Save As before you type anything.

3. **Enable editing** if Excel opens the file in Protected View.

Input cells and locked cells

Every tab is protected. You can only type in input cells; everything else is a locked formula. Many input cells already contain a formula that supplies a standard value. Those are labeled **Overwrite** on the sheet: you may type over them to raise or lower the value.

> **Important:** typing over a formula cell permanently replaces that formula in your saved estimate. That is why you work from a copy. If you need the formula back, copy the cell from your EASYPRICE MASTER file.

Do not unprotect the sheets or change locked formulas. Doing so can cause calculation errors and is not permitted under the license terms.

3. Workbook Map

Tab	Purpose
Terms & Conditions	License terms and disclaimer. Read once.
Financial Set-up	Customer details, labor rates, travel, taxes, margins, escalation. **Input.**
Equipment Services	Equipment list and coverage choices for up to 20 groups, subcontractors, and the equipment ID list. **Input.**
Filters	Filter labor and materials for each equipment group. **Review and adjust.**
Special Services	Up to 20 additional services. **Input.**
Recap Estimate	Total hours and materials by group and service. **Review.**
Estimate & Pricing Summary	Final costs and selling prices. **Review and present.**
Table #1 to Table #56	Standard maintenance data for each equipment type and size. **Update only when changing your standards.**
Fiber Filters, Pleated Filters	Filter sizes, labor hours, and material costs. **Update prices regularly.**
ECS #1 to #20 (hidden)	Equipment Cost Sheets that do the calculations for each equipment group. No input needed.

4. Step 1: Financial Set-up

Complete this tab first. These numbers drive every calculation in the estimate.

Customer information

Field	What to enter
Customer Name, Address, Phone, Location	The customer and the building or site being estimated. These carry to the cost sheets.
Estimator Name, Date	Who prepared the estimate and when.
Miles round trip to jobsite	Round-trip miles from your shop to the site. Used for the mileage charge on every trip.
Parking Fee	Daily parking cost at the site, if any. Charged once per trip.

Labor rates

EasyPrice uses two labor grade levels. **Level 1** is your senior technician; **Level 2** is a lower-cost technician or helper. Enter each as your **hourly labor cost** (wage plus payroll taxes, benefits, and insurance), not your selling rate. Margin is added later.

Field	What to enter
Annual Inspection, Level 1 and Level 2	Your hourly cost for each grade. Defaults: $45 and $25.
Operational Inspection, Repair/Replace, Service, Filter (Levels 1 and 2)	These copy the Annual Inspection rates automatically. Overwrite any of them if that type of work is done at a different cost.

Vehicle, tax, and productivity

Field	What to enter
Materials Sales Tax %	Sales tax on materials, as a decimal (6% = 0.06). Leave 0 if not taxable.
Service Sales Tax %	Sales tax on the service agreement price, if your state taxes services.
Hourly Truck Charge	Your vehicle cost per labor hour. EasyPrice multiplies it by total labor hours.
Per Mile Cost Rate	Vehicle cost per mile, multiplied by round-trip miles and number of trips.
Per Trip Charge	A flat charge per trip, if you use one.
Avail. Prod. Hours Per Day	Productive hours in an 8-hour day. Default 7 (allows a 20-minute mobilization and two 20-minute breaks). **Subtract the round-trip**

Field	What to enter
	travel hours to this site. For example, with 1 hour of round-trip travel, enter 6.

> **Tip:** Use one method for vehicle cost, either Hourly Truck Charge or Per Mile and Per Trip, so you do not charge the customer twice for the same truck.

Gross profit margins

Enter your target gross profit margin as a decimal (50% = 0.50). EasyPrice sets the price so the margin is a percentage of the selling price: **Price = Cost ÷ (1 − Margin).** At 50%, a $100 cost sells for $200.

Field	What to enter
Labor	Your labor margin.
Travel, Subcontractors/Rentals, Materials	These copy the Labor margin. Overwrite any category that should carry a different margin.

Annual pricing escalation

Enter the yearly increase for Years 2 through 5 as a decimal. Year Two defaults to 0.035 (3.5%) and the later years copy it. Overwrite any year that should differ.

5. Step 2: Equipment Services

This is the heart of the estimate. Columns **#1 through #20** each hold one equipment group: the same type and size of equipment with the same coverage. Work down each column you use.

> **Grouping tip:** If identical units differ in age or coverage, put them in separate columns. For example, put four 10-ton rooftop units that are 3 years old in column #1 and two that are 15 years old in column #2, so the age adjustment and coverage apply correctly.

Equipment, size, and quantity (rows 12 to 14)

Row	What to enter
ENTER EQUIPMENT ID#	The equipment ID number from the list lower on this tab (rows 51 onward). For example, 1 = Package Unit Heat/Cool Air Cooled; 34 = Boiler Gas Fired Hot Water.
ENTER Capacity (Tons/HP/BTUs)	The unit's size in the units that equipment's table uses. See the size rules below.
Quantity (Equipment Units)	How many units of this type and size are in the group.

Size rules:

- EasyPrice finds the closest size in the equipment's data table **at or below** the capacity you enter. For example, Table #1 lists 10, 12, and 15 tons, so a 13-ton unit is priced on the 12-ton row.

- A capacity smaller than the smallest size in the table returns an error. Check the size column on the matching **Table #** tab if you are unsure of the range or units.
- **Equipment IDs 50 to 56 work differently.** These group several single-size items. Enter the table number as the Equipment ID, and enter the item's code from the list as the Capacity. Examples: Equipment ID 50, Capacity 6 = Fan Coil HW/Steam. Equipment ID 53, Capacity 3 = Emergency Generator to 350 KW. For pneumatic and electric controls enter Equipment ID 55 and the device code 55 to 77; for DDC controls enter Equipment ID 56 and the device code 78 to 92.

Program type (rows 16 to 18)

These rows switch each part of the coverage on. Enter **1** to include it; leave it blank to exclude it.

Row	Effect
Inspection Only	Includes the scheduled inspection labor and inspection materials. Preset to 1 for all 20 columns. **Clear it in any column you are not using.**
Full Labor	Adds the annual repair labor allowance from the equipment table.
Full Service	Adds the annual repair materials (parts) allowance.

Choosing a coverage level:

- **Inspection Only agreement:** 1 in Inspection Only.
- **Full Labor agreement:** 1 in Inspection Only and Full Labor.
- **Full Service agreement (labor and parts):** 1 in all three rows.

Inspection frequency (rows 19 and 20)

Number of Annual Inspections and **Number of Operational Inspections** fill in automatically from the equipment table's standard program (for example, 1 annual and 3 operational inspections a year for a rooftop unit). Overwrite them to quote a different frequency. The total visits per unit appears below them.

Difficult access (row 23)

Enter extra labor hours per unit for equipment that is hard to reach, such as roof hatch or ladder access, ceiling-mounted units, or confined spaces. EasyPrice adds these hours to the inspection and repair labor and to filter changes.

Repair and replace adjustments (rows 25 to 30)

These adjust the repair allowances for conditions that raise or lower expected repair work. They affect repair labor and materials only, not inspections.

Row	Adjustment	Applies to
Age of equipment	+1.5% per year	Enter the age in years. Repair labor and materials.
Heavy Continuous Use	+15%	Enter 1. Repair labor and materials.
24 Hour Emergency Coverage M-F	+12%	Enter 1. Repair labor.

Row	Adjustment	Applies to
24 Hour Emergency Coverage M-S	+24%	Enter 1. Repair labor. Use instead of M-F, not both.
Multiple Compressors	+20%	Enter 1. Repair labor and materials.
Warranty	−65%	Enter 1 when major parts (such as the compressor) are under manufacturer warranty. Repair materials.

For example, a 12-year-old unit adds 18% (12 × 1.5%) to its repair allowance.

Labor grade selection (rows 33 to 40)

Each type of work defaults to **Level 1** labor (a 1 in the Level 1 row). To have a Level 2 technician do that work for a group, delete the 1 in the Level 1 row and enter 1 in the matching Level 2 row. Use one level per work type per column; entering 1 in both would count the hours twice.

Work type	Rows
Annual Inspection	Level 1 / Level 2
Operational Inspection	Level 1 / Level 2
Repair	Level 1 / Level 2
Filter changes	Level 1 / Level 2

Filters (rows 43 and 44)

Row	What to enter
Filter Type	**F** for fiber (standard) filters or **P** for pleated filters.
Filter Changes	Fills in as annual plus operational inspections (one change per visit). Overwrite for a different number of changes per year. **Enter 0 to leave filters out** for that group.

Subcontractors and rentals (rows 46 to 50)

Use the four lines here for outside costs such as filter contractors, water treatment, lifts, cranes, or rental equipment. Enter a description in column A, then the vendor, contact, phone number, and **annual cost**. These carry to the pricing summary and receive the Subcontractors/Rentals margin.

Job notes

Use the Job Notes area to the right of the columns to record site details, access instructions, exclusions, or assumptions for this estimate.

6. Step 3: Filters

The Filters tab calculates filter labor and materials for each equipment group automatically, using the filter size and quantity from the equipment table and the price list for the filter type you chose. Review each line and overwrite where your site differs:

Column	Adjust when
Filter Size	The actual filter size on site differs. The size must match a size on the Fiber Filters or Pleated Filters tab exactly, written the same way (for example 20x25x2).
Quantity Per Change	The unit holds a different number of filters.
Per Filter Unit Hours	Access differs. Standard values: 0.08 hours normal access, 0.15 ceiling access, 0.04 when the customer supplies filters at the equipment.

Filter labor hours by grade level and total annual filter materials appear in the right-hand columns and carry to the Recap Estimate.

Updating filter prices

Keep the **Per Filter Material Cost** column on the Fiber Filters and Pleated Filters tabs current with your supplier pricing. Update your EASYPRICE MASTER located last two tabs to the right so every new estimate starts with current prices.

7. Step 4: Special Services

Use this tab for work not covered by the equipment tables, such as coil cleaning, belt programs, indoor air quality testing, or seasonal start-ups. Each of the 20 lines takes:

Column	What to enter
Service Description	A short name for the service.
Quantity	Number of units or items serviced.
Frequency	Times per year.
Unit Labor Hours	Hours per item per occurrence.
Labor Level 1 / Level 2	Enter 1 under the grade level that will do the work.
Unit Materials	Material cost per item per occurrence.

EasyPrice calculates: **Labor Hours = Quantity × Frequency × Unit Hours**, and **Total Materials = Quantity × Frequency × Unit Materials**.

8. Step 5: Review the Recap Estimate

The Recap Estimate shows one line for each equipment group (Input Sheet #1 to #20) and each special service, with columns for annual inspection, operational inspection, repair, filter, and special service labor hours by grade level, plus inspection, repair, filter, and service materials. Totals are on the Totals row.

Use this tab to check reasonableness before pricing. Ask: Do the hours per unit match what your technicians actually spend? Is any group zero when it should not be? Is a large repair allowance coming from one group?

9. Step 6: Estimate & Pricing Summary

This tab produces the final numbers. Each section shows its cost and, in the right-hand column, its selling price after margin.

Labor

Labor hours from the Recap Estimate are multiplied by a **productivity factor** that converts productive hours to paid hours: **8 ÷ Available Productive Hours**. With the default of 7, the factor is 1.143, so 7 productive hours cost a full 8-hour day. Total hours × your labor rate = labor cost.

Travel

- **Hourly Truck Charge** = total labor hours × your hourly truck rate.
- **Total Trips** = total labor hours ÷ 8, but never fewer than the average number of visits per equipment group.
- **Mileage** = trips × round-trip miles × cost per mile.
- **Per Trip Charge** and **Daily Parking** = trips × the rate.

Materials

Inspection, repair, filter, and service materials are totaled, materials sales tax is added, and the Materials margin is applied.

Rentals and subcontracts

The four subcontractor and rental lines from the Equipment Services tab, with the Subcontractors/Rentals margin applied.

Pricing summary

Line	Meaning
Total Contract Cost	Labor + travel + materials + subcontracts, at cost.
Total Profit Margin	Gross profit in dollars, with the blended margin percentage beside it.
Subtotal Annual Sell Price 1	Sum of the four categories after their margins.
Service Tax	Service sales tax, if entered.

Line	Meaning
Total Annual Sell Price 1	The **Year 1 annual agreement price.**
Year 2 to Year 5	Each year's price escalated by that year's rate.

> **Before presenting:** check the blended margin percentage, compare the price per unit and per ton with similar agreements you have sold, and confirm the scope, frequency, exclusions, and price expiration date in your written proposal.

10. Worked Example

A medical office building has four 10-ton rooftop package units (Equipment ID 1) and one 400-capacity gas-fired hot water boiler (Equipment ID 34). The customer wants a Full Service agreement.

Inputs

Setting	Value
Labor rates	Level 1 $45/hour (defaults)
Round-trip miles / cost per mile	30 miles / $0.70
Hourly Truck Charge	$12.00
Available productive hours	7
Gross profit margin	50% on all categories
Column #1	ID 1, Capacity 10, Quantity 4, Program rows 16 to 18 = 1, Filter Type F
Column #2	ID 34, Capacity 400 (sized from the Table #34 size list), Quantity 1, Program rows 16 to 18 = 1
Columns #3 to #20	Inspection Only cleared

Results

Category	Cost	Sell Price
Labor (82.1 hours)	$3,694	$7,387
Travel (about 10 trips)	$1,200	$2,401
Materials (inspection, repair, filters)	$1,844	$3,687
Total	$6,737	$13,475
Year 2 / Year 3 (3.5% escalation)		$13,947 / $14,435
Year 4 / Year 5		$14,940 / $15,463

The rooftop units come out at 1 annual and 3 operational inspections each, with 16 filters per year at four changes, all from the standard program in Table #1. Your own results will differ with your rates, margins, and site conditions.

11. Keeping Your Data Current

- **Labor rates and margins:** review at least once a year and whenever wages or benefits change. Update the EASYPRICE MASTER so new estimates start correctly.
- **Filter prices:** update the Fiber Filters and Pleated Filters tabs when supplier pricing changes.
- **Equipment tables:** each Table # tab lists, by size, the number of annual inspections, annual inspection hours and materials, number of operational inspections, operational inspection hours and materials, annual repair hours and repair material cost, and filter size, type, efficiency, quantity, per-filter hours, and per-filter cost. Adjust these only when your own job history shows a consistent difference, and record what you changed.
- **Market conditions:** copper, steel, refrigerant, and equipment prices change. Review repair material allowances when they do.

12. Troubleshooting

Problem	What to check
A group shows zero hours	Is the Equipment ID and Capacity entered? Is there a 1 in Inspection Only for that column?
#N/A or an error in a group	The capacity is smaller than the smallest size in that equipment's table, or the Equipment ID does not exist. There is no Table #52.
Hours or prices for columns you did not use	Clear the preset 1 in Inspection Only for unused columns, and check that no stray values remain in rows 12 to 14.
Filter materials are zero	Check that Filter Type is F or P and the filter size matches a size on the filter price list exactly.
Filters are included when they should not be	Enter 0 in Filter Changes for that column.
Labor hours seem doubled	Check that only one grade level (1 or 2) has a 1 for each type of work in a column.
A formula was overwritten by mistake	Copy the same cell from your EASYPRICE MASTER file back into the estimate.
Total Profit Margin shows #DIV/0!	Normal on a blank estimate. It clears once equipment is entered.

13. Terms of Use Summary

EasyPrice estimates are guidelines based on the values you enter. They do not constitute a binding offer or a guarantee of final pricing. Verify pricing, quantities, specifications, and system conditions before presenting to a customer, and include scope, exclusions, and price expiration terms in your proposal. EasyPrice is licensed for internal use by a single company; redistribution or sharing outside the licensed organization is not permitted. See the Terms & Conditions tab for the full terms.

Questions or support: Join HVAC Success, LLC, (802) 281-3259, support@joinhvacsuccess.com.