EasyPrice™ User Guide

Commercial Retrofit Estimating & Pricing Program
Commercial/Industrial/Healthcare HVAC Projects

JOINHVACSUCCESS.COM
TRANSFORM INTO A SERVICE POWERHOUSE

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For Microsoft Excel 2016, 2019, and Microsoft 365

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EasyPrice Retrofit Estimating & Pricing Program

USER GUIDE | Workbook-based commercial retrofit estimating

Based on the supplied EASYPRICE-PROJECTS.xlsx workbook • Prepared October 2026

Purpose: Build a consistent project estimate from company cost assumptions, job-specific equipment/materials and labor inputs, then review a calculated selling price. This guide describes the uploaded workbook as provided; it does not imply that all calculations or links have been independently tested.

1. Start Here: Workbook Overview

Worksheet	Purpose	Primary user action
FINANCIAL SET-UP	Company labor, truck, tax, risk and gross-profit defaults	Review and update rates before estimating
JOB INSTALL SEQUENCE INPUT	Customer/job details, line items, installation and startup labor	Enter project-specific quantities, costs and labor units
FINAL ESTIMATE	Labor, travel, materials, subcontractor and pricing summary	Review outputs; enter subcontract/rental details; validate final price

Recommended order: 1) Save a new project copy; 2) verify FINANCIAL SET-UP; 3) complete JOB INSTALL SEQUENCE INPUT; 4) review FINAL ESTIMATE; 5) validate and prepare a customer proposal.

2. Before Entering a Project

1. Open EASYPRICE-PROJECTS.xlsx in a spreadsheet application that supports Excel formulas.
2. Save As a new file with a descriptive project name, e.g., Customer_Site_Retrofit_Estimate_YYYY-MM-DD.xlsx. Keep the original as a master template.
3. Confirm the workbook opens with calculations enabled; avoid overwriting calculated/formula cells.
4. Verify local taxes, company-approved profit margins, actual wage burden, equipment pricing, productivity assumptions, and travel rates.
5. Check whether your organization requires an approval or second estimate review before quoting.

Important: The supplied workbook displays ©2002 Building Services Institute, Inc. and serial number 072702. Its initial entries are template defaults, not current industry rates or validated business policies.

3. Worksheet 1 — FINANCIAL SET-UP

3.1 Labor grades and hourly cost rates

The sheet lists two Installation Labor Levels and two Startup/Test/Verification labor levels. It shows example level/rate pairs of Level 1 = $30/hour and Level 2 = $18/hour for both categories. Replace these with current company-approved costs; do not treat the example amounts as recommended pricing.

3.2 Vehicle, travel, tax and risk settings

Setting shown in workbook	Default shown	How to use
Per Trip Truck Charge	$0	Set company-approved per-trip charge if applicable
Per Mile Charge	$0	Set vehicle mileage cost rate
Materials Sales Tax %	0.07 (7%)	Verify tax applicability and local requirements
Service Sales Tax %	0	Verify whether services are taxable
Hourly Truck Charge	$10	Use current truck/vehicle hourly cost assumption
Risk & Proficiency & Warranty	0.05 (5%)	Use an approved risk/warranty allowance
Available Productive Hours Per Day	6.5	Use realistic on-site productive hours per workday

The worksheet note states that available productive hours should reflect breaks and other nonproductive time. The FINAL ESTIMATE displays a productivity factor of approximately 1.230769 when the default 6.5 productive hours/day is used. Review that assumption before quoting.

3.3 Gross-profit-margin settings

Four categories are listed separately: Labor, Travel, Subcontractors/Rentals, and Materials. The supplied default is 0.40 (40%) for each. A gross-profit margin is not the same as a markup: for a single cost category, an illustrative 40% gross margin corresponds to selling price = cost ÷ (1 − 0.40), not cost × 1.40. Confirm how the workbook aggregates categories and inspect the calculated results.

4. Worksheet 2 — JOB INSTALL SEQUENCE INPUT

4.1 Job identification

6. Enter the Customer and Location.
7. Enter the Estimator and Date.
8. Enter miles to the jobsite and daily parking cost, where applicable. Verify whether mileage is one-way or round-trip against the final estimate.

4.2 Add equipment and material line items

The worksheet provides 30 numbered input rows (items 1–30) and a Totals row. Each line has Equipment/Material Description, QTY, Unit Cost and a calculated Total. Include equipment, accessories, piping/ductwork, controls, consumables and other applicable materials as distinct line items when practical.

4.3 Enter installation and startup labor

Each line includes Installation Labor Level 1 and Level 2, Labor Unit Hours, and calculated totals for each labor level. Separate columns capture Startup Labor Level 1 and Level 2, Startup Labor Unit Hours, and corresponding calculated totals. The template displays “Enter 1” guidance above the level selection columns; follow the workbook’s selection convention and confirm its effect in the FINAL ESTIMATE before relying on the result.

9. For each material/equipment line, enter a clear description, quantity and unit cost.
10. Specify the applicable installation labor level(s) using the workbook’s designated columns.
11. Enter estimated installation labor unit hours for that line.
12. Specify startup/test/verification labor level(s) and startup labor unit hours where needed.
13. Review calculated totals and the bottom Totals row. Repeat for all relevant items.

Estimator practice: document assumptions for crane lifts, access restrictions, controls integration, permits, disposal, refrigerant recovery, electrical upgrades, after-hours work, commissioning, and unforeseen conditions. Not all of these have dedicated input fields; use line descriptions or a separate scope sheet.

5. Worksheet 3 — FINAL ESTIMATE

5.1 Review labor and productivity

The labor section separates Installation Labor Grade Levels 1 and 2 from Startup/Test/Verification Levels 1 and 2. It shows subtotal hours, productivity factor, total hours, rates and calculated costs. Confirm all four labor categories match the project scope.

5.2 Review travel charges

The Travel Summary includes Hourly Truck Charge, Total Trips, Mileage Charge, Per Trip Charge and Daily Parking. Validate the number of trips, round-trip mileage and whether the job requires multiple mobilizations.

5.3 Review materials and taxes

The Materials Summary displays Total Equipment/Materials and a tax-adjusted subtotal. Check quantities, unit prices, freight and material-tax treatment. Freight or special equipment charges should not be assumed included unless entered.

5.4 Enter subcontractors and rentals

The Subcontracts/Equipment Rentals Summary includes Description, Vendor, Contact, Telephone # and Costs, followed by a subtotal. Enter applicable third-party costs and confirm quotes, exclusions, insurance requirements and expiration dates.

5.5 Validate the Pricing Summary

Pricing Summary row	Meaning / review action
Total Contract Cost	Verify roll-up of all direct cost categories
Risk & Proficiency	Confirm allowance matches company policy
Subtotal Cost	Check adjusted cost before profit
Total Profit Margin	Review margin calculation; check for errors
Subtotal Sell Price	Check calculated price before service tax
Service Tax Rate	Confirm tax treatment
Total Sell Price	Final figure to review before proposal approval

With the supplied blank template, the Total Profit Margin display includes a #DIV/0! error. This appears because the estimate is empty; do not send a quote with spreadsheet errors or assume the issue resolves without verification.

6. Worked Example — Entry Sequence (Illustrative Only)

Example: A customer requests replacement of a commercial rooftop unit. The following are example entries and NOT a validated quote or a reproduction of workbook-calculated output.

Entry	Illustrative input
Customer / location	Example Property / Example Site
Line 1	Replacement rooftop unit; QTY 1; actual vendor cost
Line 2	Roof curb/adaptor; QTY 1; actual vendor cost
Line 3	Electrical/controls accessories; actual quantities and

	costs
Installation labor	Crew grades and estimated unit hours per line
Startup labor	Commissioning/testing grades and unit hours
Travel	Distance, trips and parking if applicable
Subcontractors	Crane rental, electrician, or controls contractor if applicable

After entering these details, review labor, travel, materials, subcontractors and Total Sell Price on FINAL ESTIMATE. Compare the result with vendor quotes and a written scope of work; obtain internal approval before presenting it.

7. Estimate Quality-Control Checklist

☐ Current company labor rates and productivity assumptions confirmed

☐ Gross-profit margins and risk allowance approved

☐ Equipment model/capacity and supplier quote verified

☐ Material quantities, taxes and freight checked

☐ Installation and startup/commissioning hours included

☐ Travel, parking, mobilization and truck costs included

☐ Subcontractors and equipment rentals included

☐ Scope, exclusions, permits and schedule documented

☐ FINAL ESTIMATE has no formula errors or unexpected zeros

☐ Final selling price approved before customer delivery

8. Troubleshooting

Issue	Check first
Final price is zero	Confirm quantities, unit costs, labor entries and formula calculations
Profit margin shows #DIV/0!	Blank or zero-cost estimate; review inputs and formula references
Unexpected labor cost	Check labor level selection, unit hours, productivity factor and rates
Travel costs missing	Check trips, mileage, truck rates and parking assumptions
Tax seems incorrect	Review materials/service tax defaults and applicability
Estimate appears too low	Look for omitted startup, rentals, subcontractors, permits or risk costs
Totals not updating	Verify Excel calculation mode and intact formulas

9. Preparing the Customer Proposal

This workbook produces an internal estimating/pricing summary. A customer-facing proposal should separately describe scope of work, equipment and specifications, deliverables, exclusions, project schedule, payment terms, warranty, validity period, and approval/signature terms. Avoid exposing internal labor costs, margins or pricing assumptions unless intended.

10. Important Limitations and Version Notes

- The guide is grounded in the three sheets of the supplied EASYPRICE-PROJECTS.xlsx workbook; it does not document a separate web application or automated proposal workflow.
- The uploaded workbook contains template defaults and older copyright/serial information. No assertion is made about current licensing, support status or current tax compliance.
- The exact workbook formula logic has not been independently audited. Users should test a representative project and reconcile outputs before production use.
- Do not modify formulas, rename worksheets, or change cell structures without testing downstream totals.
- Keep a dated backup of the original workbook and of each completed estimate.