
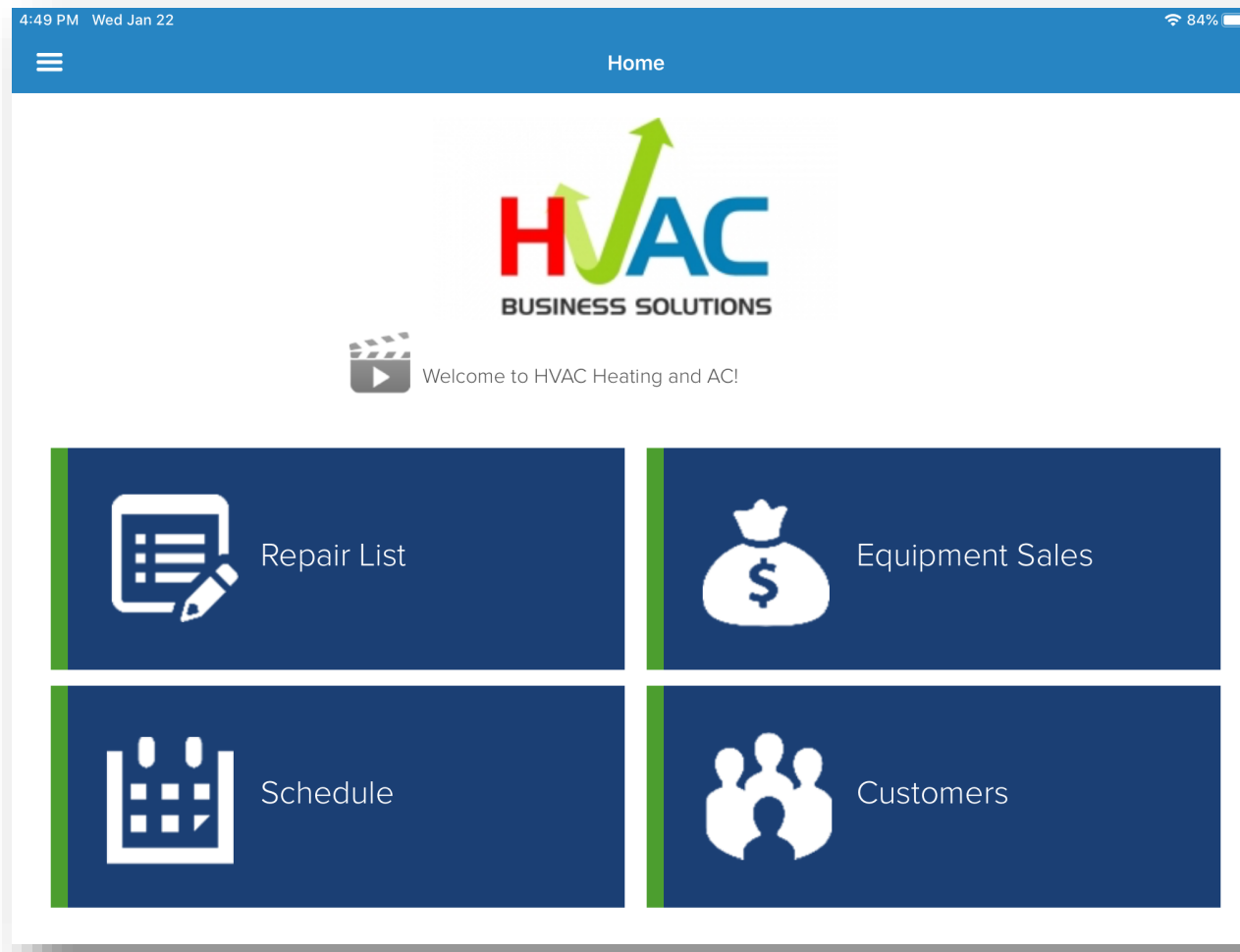


P3
HVAC
SOFTWARE



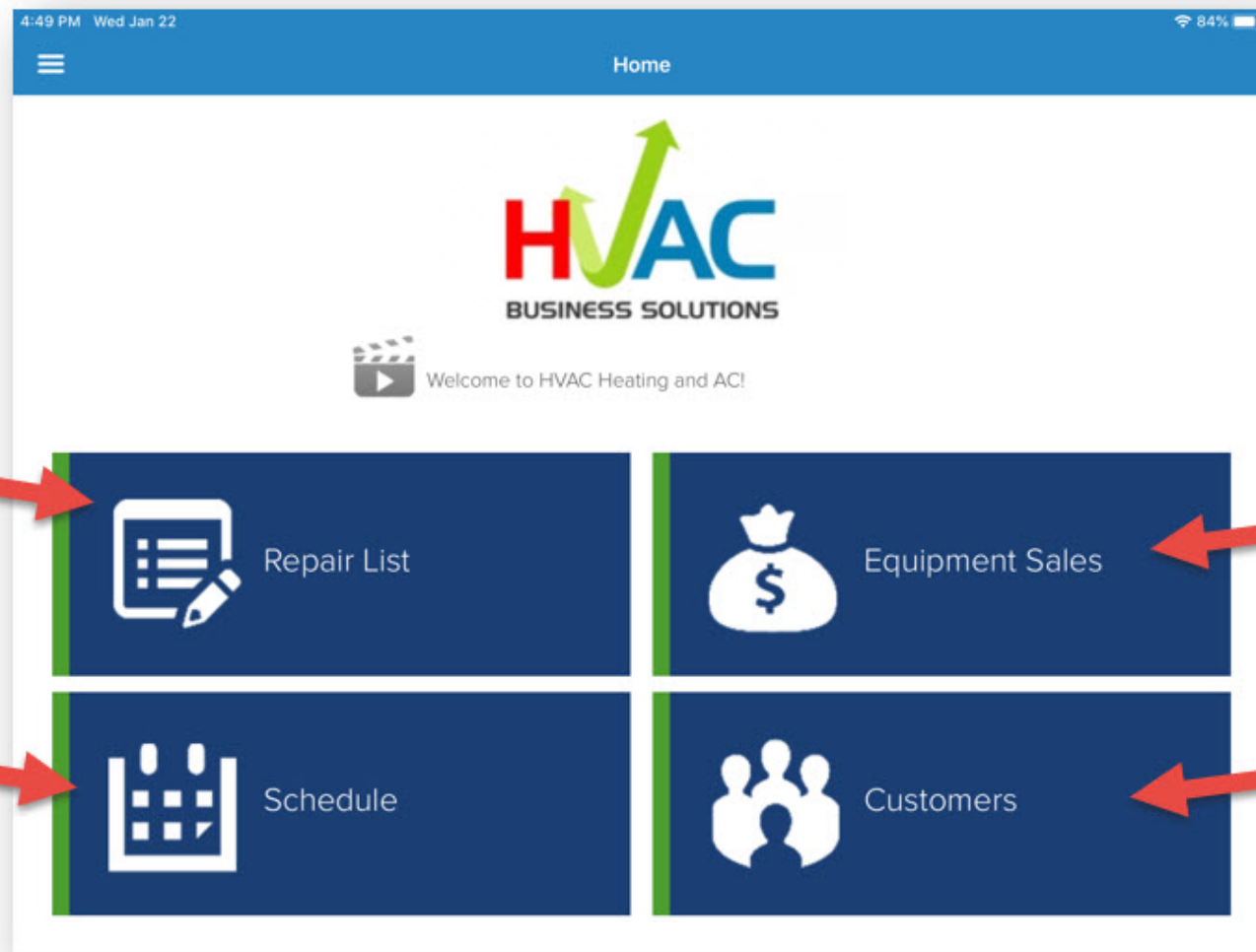
App Home Page – 1/3



App Home Page – 2/3



App Home Page – 3/3



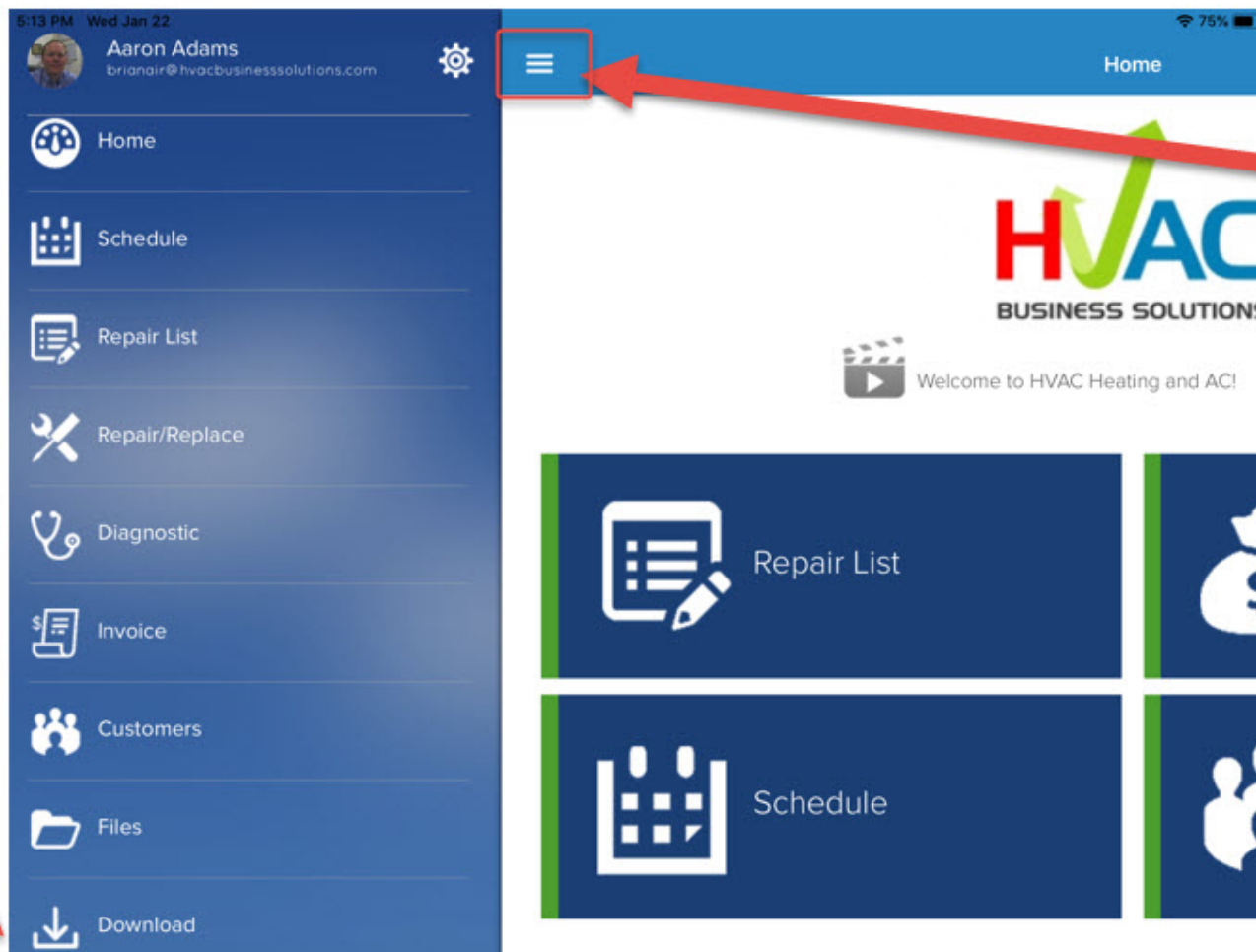
To View Repair Pricing

For Technician to View
Daily Schedule

To Generate Equipment Proposals

To Find Customers
(Used Most Often By Owner Operators)

App Menu – 1/2



Click to See Full Menu

Swipe Up to see more Options

App Menu – 2/2

The screenshot shows the P3 HVAC Software App Menu. The left sidebar contains the following items: Schedule, Repair List, Repair/Replace, Diagnostic, Invoice, Customers, Files, Download, and Not Sync'd Files. The main content area displays the 'Customer List' for 'Customer' with a search bar and a table of customer data. Annotations include: a red box labeled 'Click App Menu' pointing to the hamburger menu icon; a red box labeled 'Sync Schedule' pointing to the 'Sync Schedule' button; a red box explaining when to use 'Download'; and another red box explaining when to use 'Not Sync'd Files'.

3:07 PM Thu Jul 2
Aaron Adams
brianair@hvacbusinessolutions.com

Customer

Customer List

Search on Na

Name	Phone#	Email	Address
Nathan Jones	713-270-4544	✓	12999 Murphy Road, Staffc

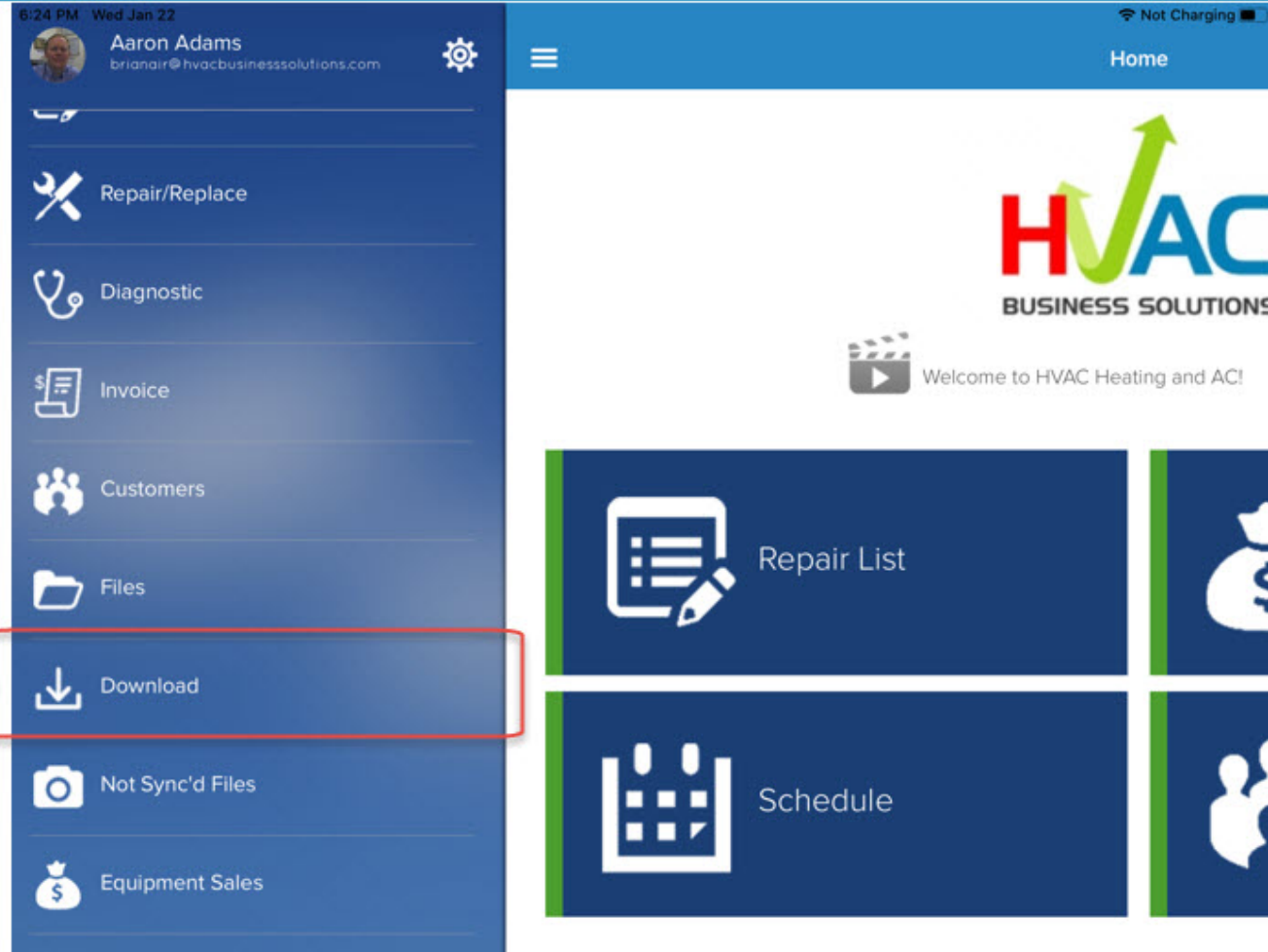
Sync Schedule

Download only when there is new equipment/repairs, price changes or setting changes.

Use if software is showing Green Arrows, but they are not in the Command Center. Usually happens if transmission is interrupted and the software incorrectly thinks the sync was successfully.

Download – 1/2

Click Here

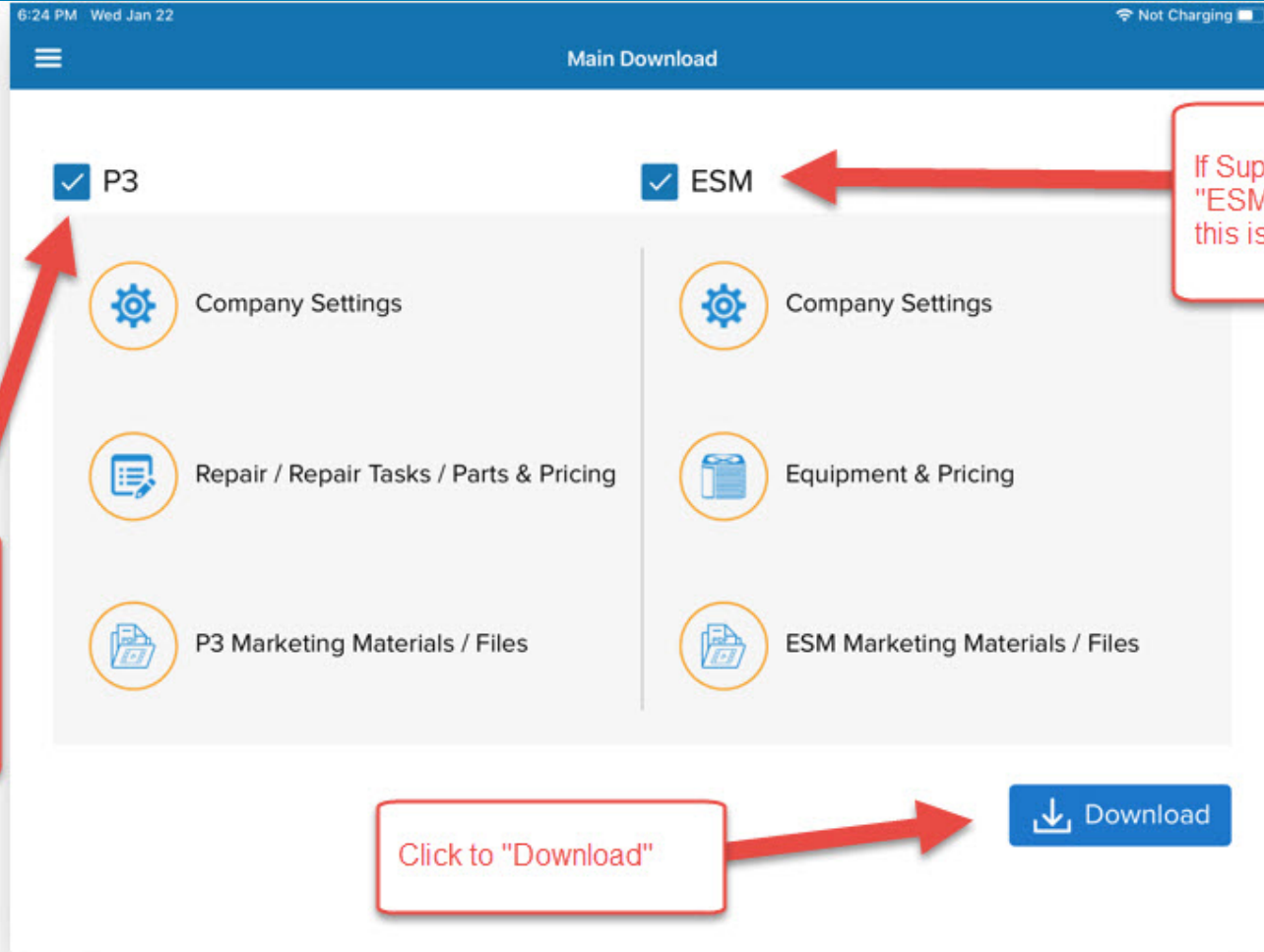


Download – 2/2

"Download"

- One way only, Command Center to App
- Does NOT push information from App to Command Center
- Only way to get new Settings, Pricing and Materials on the App
- If Tech does not "see" a change made in the Command, most likely he did not complete a Download

If Support says to complete a "P3 Download", make sure this is checked.



6:24 PM Wed Jan 22 Not Charging

Main Download

P3 ESM

Company Settings Company Settings

Repair / Repair Tasks / Parts & Pricing Equipment & Pricing

P3 Marketing Materials / Files ESM Marketing Materials / Files

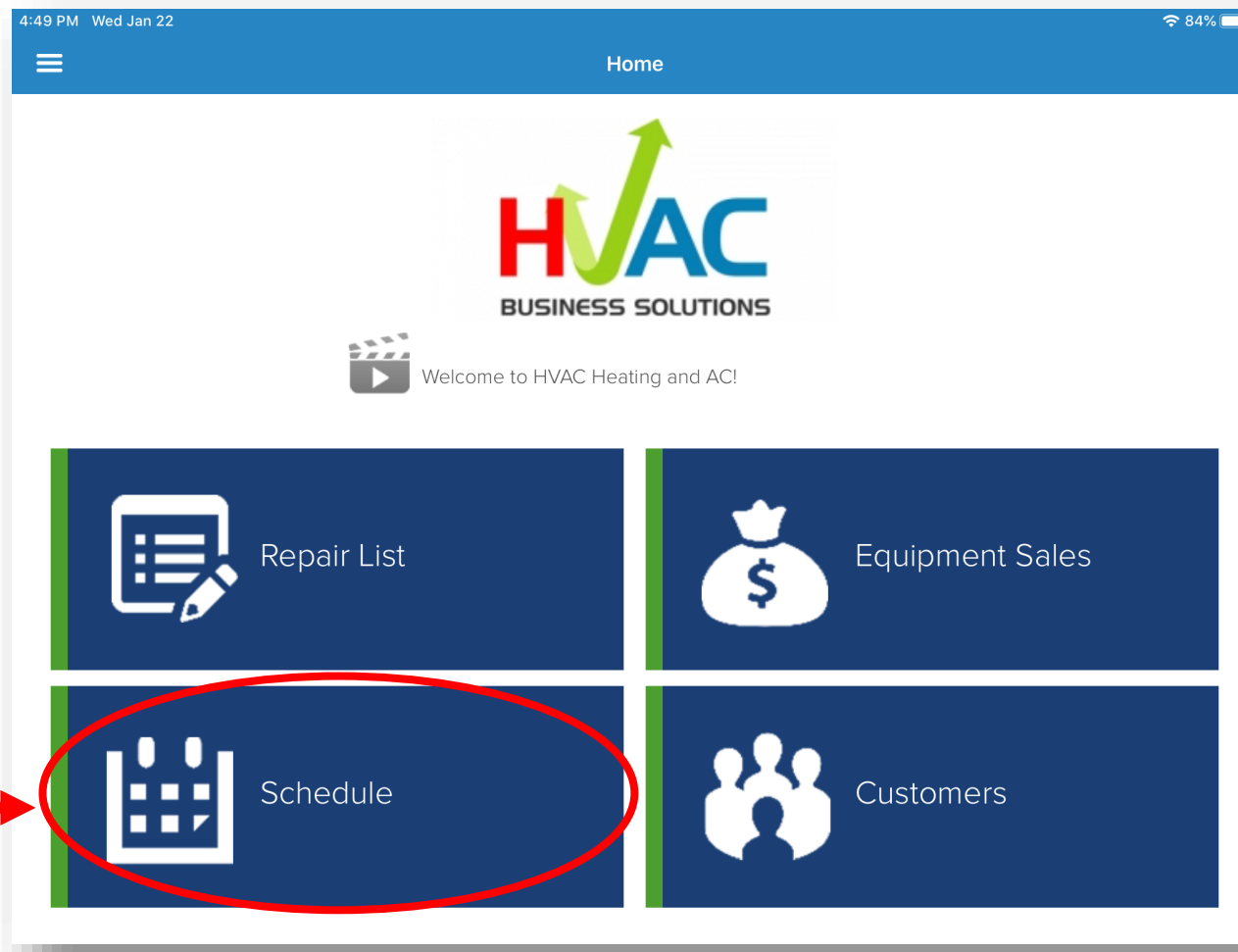
Download

If Support says to complete a "ESM Download", make sure this is checked.

If Support says to complete a "Full Download", make sure BOTH are checked.

Click to "Download"

Service Calls – 1/6



Service Calls – 2/6

4:49 PM Wed Jan 22 84%

Sync Today's Calls / Appointments List +

Today's Calls Last Sync Date: ▼	Future Calls Last Sync Date:	All Open Calls Last Sync Date:	Completed Calls Last Sync Date:
---------------------------------------	---------------------------------	-----------------------------------	------------------------------------

No Appointments Scheduled. Device Date: Jan 22, 2020 4:49 PM

Click to pull down Appointments

Different Views for Technician based on Service Call Status
Click on Square/Tab to See that View

Service Calls – 3/6

3:06 PM Thu Jul 2 94%

Sync Today's Calls / Appointments List +

Today's Calls Last Sync Date: Future Calls Last Sync Date: All Open Calls Last Sync Date: Completed Calls Last Sync Date:

No Appointments Scheduled. Device Date: Jul 2, 2020 3:05 PM

Click here for Tech to obtain his Calls for the Time Period.

Service Calls – 4/6

Last Time Tech Clicked Sync Button → Today's Calls
Last Sync Date: Jan 22, 2020 4:56 PM

Click Address to get Map → 709 Malone St
Houston, Tx, 77007

Will turn Red, when there is information in the "Notes" field for the Service Call → Notes

Click for Tech to Check-In to the Call → In-Route?

The Date/Time on the iPad/Tablet → Device Date: Jan 22, 2020 4:56 PM

Status of the Customer Data
 Green = Everything Sync
 Yellow = Data in Command Center, but not on App
 Red = Data on App, Not in Command Center
 Click Arrows to Sync

Name	Status	Sync Status
George Williams 713-270-6406 709 Malone St Houston, Tx, 77007	Confirmed 8am - 10am Jan 22, 2020	<ul style="list-style-type: none"> Customer Equipment Service Agreement Invoice

Service Calls – 5/6

3:06 PM Thu Jul 2 94%

Sync Today's Calls / Appointments List

Today's Calls

Last Sync Date:
Jul 2, 2020 3:06 PM

Future Calls

Last Sync Date:

All Open Calls

Last Sync Date:

Completed Calls

Last Sync Date:

Device Date: Jul 2, 2020 3:06 PM

Today's Calls / Appointments List Click status icon to update the status

Name	Status	Sync Status	Customer	Diagnostic
<p>Nathan Jones</p> <p>713-270-4544</p> <p><u>12999 Murphy Road</u> <u>Stafford, TX, 77477</u></p> <p style="background-color: #007bff; color: white; padding: 2px;">Notes</p>	<p>Confirmed</p> <p>8am - 10am</p> <p>Jul 2, 2020</p> <p style="border: 1px solid #007bff; padding: 2px; text-align: center;">In-Route?</p>	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="display: flex; align-items: center;"> ↻ Customer </div> <div style="display: flex; align-items: center;"> ↻ Equipment </div> <div style="display: flex; align-items: center;"> ↻ Service Agreement </div> <div style="display: flex; align-items: center;"> ↻ Invoice </div> </div>	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="display: flex; align-items: center;"> ↻ Diagnostic </div> <div style="display: flex; align-items: center;"> ↻ Customer Notes </div> <div style="display: flex; align-items: center;"> ↻ Appointments </div> <div style="display: flex; align-items: center;"> ↻ Other Info </div> </div>	<div style="display: grid; grid-template-columns: 1fr 1fr; gap: 5px;"> <div style="background-color: #007bff; color: white; padding: 5px; text-align: center; font-size: x-small;"> 📄 View Appointment Details </div> <div style="background-color: #007bff; color: white; padding: 5px; text-align: center; font-size: x-small;"> 👤 View Customer Details </div> <div style="background-color: #007bff; color: white; padding: 5px; text-align: center; font-size: x-small;"> 👨‍🔧 Start Diagnostic </div> <div style="background-color: #007bff; color: white; padding: 5px; text-align: center; font-size: x-small;"> 📄 Start Invoice </div> </div>

Green arrows mean the App and the Command Center are in Sync.

Red arrows mean there is information on the App that has not sync'd to the Command Center

Yellow arrows mean the software doesn't know if the data is in Sync. When the call is first sync'd to the App, only certain data is transferred to minimize the time spend syncing. Therefore, the Tech will need to click the arrows to pull down data if it is available.

Service Calls – 6/6

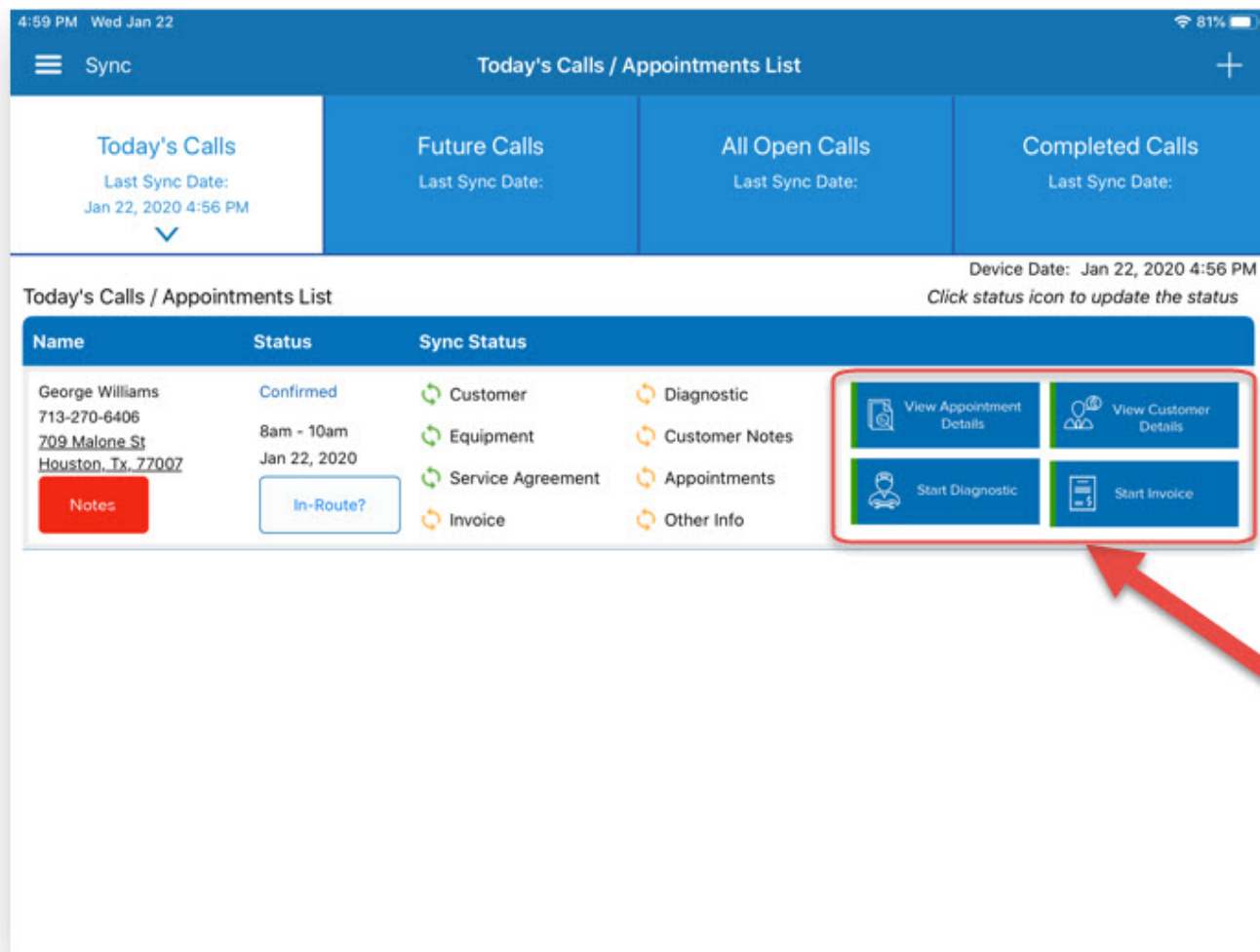
To change how many Service Calls the Technician sees at One-Time:

Command Center:

- Click Settings
- Click Dispatch Settings
- Go to Tech Settings Section

Options:

- One at a Time
- Specific Number of Appointments
- All



4:59 PM Wed Jan 22 Sync Today's Calls / Appointments List 81%

Today's Calls Last Sync Date: Jan 22, 2020 4:56 PM

Future Calls Last Sync Date:

All Open Calls Last Sync Date:

Completed Calls Last Sync Date:

Device Date: Jan 22, 2020 4:56 PM

Today's Calls / Appointments List Click status icon to update the status

Name	Status	Sync Status
George Williams 713-270-6406 709 Malone St Houston, Tx, 77007	Confirmed 8am - 10am Jan 22, 2020	<ul style="list-style-type: none"> Customer Equipment Service Agreement Invoice

Notes In-Route?

Diagnostic Customer Notes Appointments Other Info

View Appointment Details View Customer Details Start Diagnostic Start Invoice

Main Activities for the Call

Invoice – 1/3

Switch from 2-Column (Residential) to 1-Column (Commercial)

Click to return to Customer Record

Address selected when booking Service Call. Click Pencil to Change.

This is a "working" invoice - i.e. this is not the version the customer sees via Email, PDF, Text

5:03 PM Wed Jan 22 79%

Switch Template Save & Sync

Date: Jan 22, 2020
George Williams

Inv No. AESMB1179
PO#
Diagnostic Ref. No.

Service Location:
Address: 709 Malone St, Houston, Tx 77007
Phone: 713-270-6406, Email: Georgew@hvacbusinesssolutions.c...

Billing Address:
Address: 13005 Murphy Road Suite A, Stafford, TX 77483
Phone: 713-270-6406, Email: Georgew@hvacbusinesssolutions.com

Cart Items Customer Notes Technician Notes Add System Part Add New Repair Add System Repair

Task ID	Description	System	Qty	VIP Club Price	Amount
	Regular Diagnostic			\$59.00	\$89.00
	Sub Total			\$59.00	\$89.00
	Sales Tax - 0%			\$0.00	\$0.00
	TOTAL			\$59.00	\$89.00
	Amount Received				\$0.00
	Amount Owed				\$89.00

STOP WANT TO PAY LESS? Missed Savings **\$30.00**
Create New Service Agreement & Recalculate

I Authorize the work listed above for \$89.00 Customer Signature Coupon Code **REDEEM**

Invoice #
Letters=Tech identification
Numbers = Invoice Number

Command Center:
- Click Settings
- Click Technicians
- Edit Tech & Set Values

Set when booking Service Call.
Click Pencil to Change for this Invoice.

Set in Customer Record
Click Pencil to Change for this Invoice

Invoice – 2/3

5:03 PM Wed Jan 22

Switch Template View Cart - George Williams Save & Sync

Date: Jan 22, 2020
George Williams

Inv No. AESMB1179
PO#
Diagnostic Ref. No.

Service Location:
Address: 709 Malone St, Houston, Tx 77007
Phone: 713-270-6406, Email: Georgew@hvacbusinesssolutions.c...

Billing Address:
Address: 13005 Murphy Road Suite A, Stafford, TX 77483
Phone: 713-270-6406, Email: Georgew@hvacbusinesssolutions.com

Cart Items Customer Notes Technician Notes Add System Part Add New Repair Add System Repair

Task ID	Description	System	Qty	Club Price	Amount
	Regular Diagnostic			\$59.00	\$89.00
	Sub Total			\$59.00	\$89.00
	Sales Tax - 0%			\$0.00	\$0.00

WANT TO PAY LESS?
Missed Savings \$30.00
Create New Service Agreement & Recalculate

Customer Signature
I Authorize the work listed above for \$89.00

Coupon Code REDEEM

Notes Visible to the Customer

Internal Notes Only

Click to Add Service Agreement to Invoice

Click to Add Part to Invoice
This is the Marked Up Price of the Part only.

Click to Add Line Item to Invoice
Meant for situations where the Product/Service is NOT in the main Repair Library.

Click to Product/Service from Repair Library to Invoice

Invoice – 3/3

5:12 PM Wed Jan 22

Switch Template View Cart - George Williams Save & Sync

Phone: 713-270-6406, Email: Georgew@hvacbusinesssolutions.c... Phone: 713-270-6406, Email: Georgew@hvacbusinesssolutions.com

Cart Items Customer Notes Technician Notes Add System Part Add New Repair Add System Repair

Description	Amount
	\$89.00
	\$89.00
	\$0.00
TOTAL	\$59.00
Amount Received	\$0.00
Amount Owed	\$89.00

Amount Received \$0.00

Amount Owed \$89.00

STOP WANT TO PAY LESS? Missed Savings \$30.00

Create New Service Agreement & Recalculate

Customer Signature

I Authorize the work listed above for \$89.00
I have read & agree to the Terms & Conditions

Customer Signature

The work has been completed to my satisfaction.
I have read & agree to the Terms & Conditions

Coupon Code REDEEM

Billing Terms: Due on Receipt

Save & Sync Save Invoice Email Invoice Payment

Customer Authorizes the Work

Invoice changes from "Estimate" to "Work Authorized" automatically

Customer Approves the Work

Invoice changes from "Work Authorized" to "Complete & Not Paid" automatically

Saves Invoice AND Sends to Command Center

Enter Coupon Code

Setup in Command Center:
- Click Settings
- Click Coupons

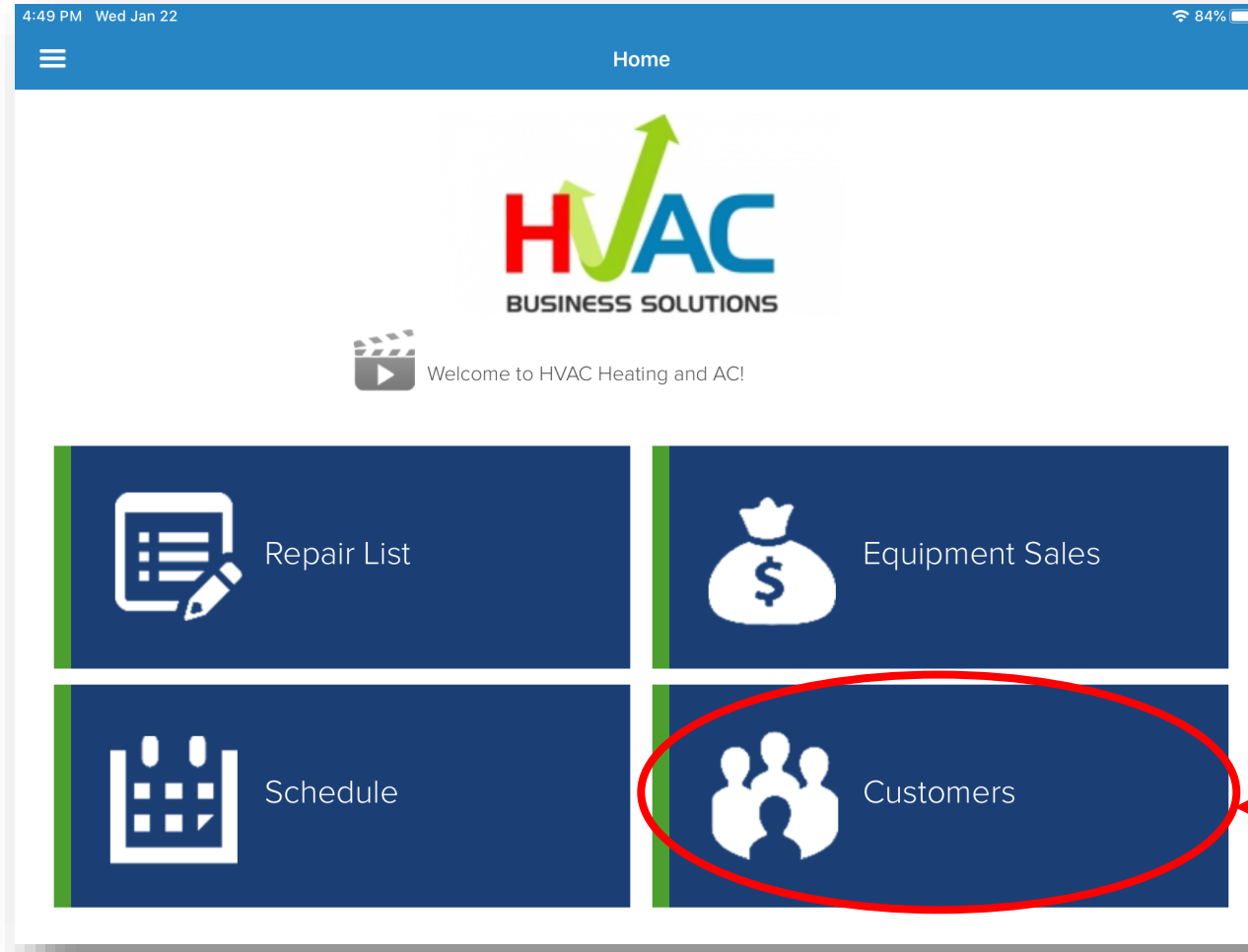
This language can be changed.

Command Center:
- Click Settings
- Terms & Conditions Section

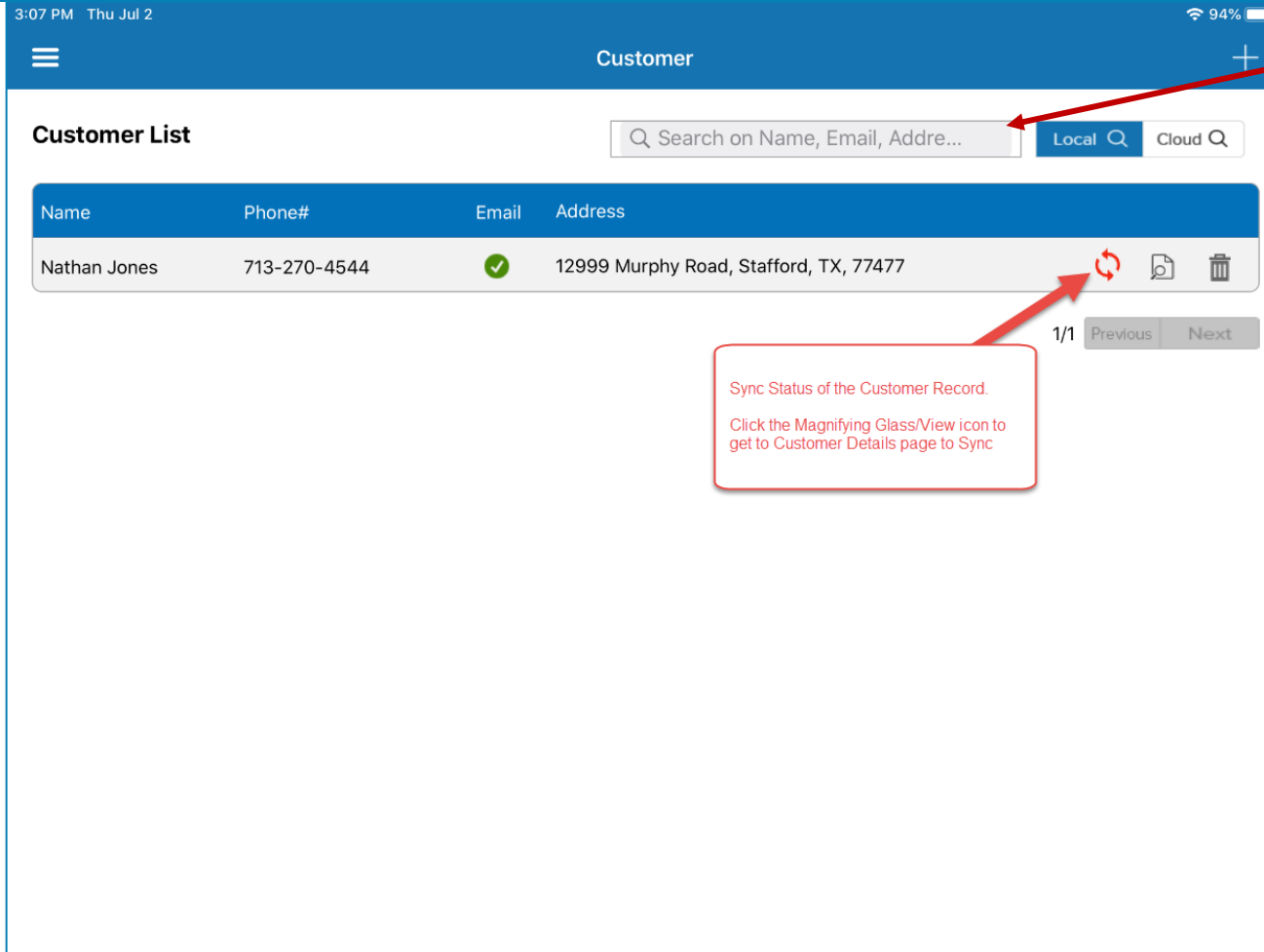
Saves to iPad/Tablet Only

Click to Record Payment

Customer Record – 1/6



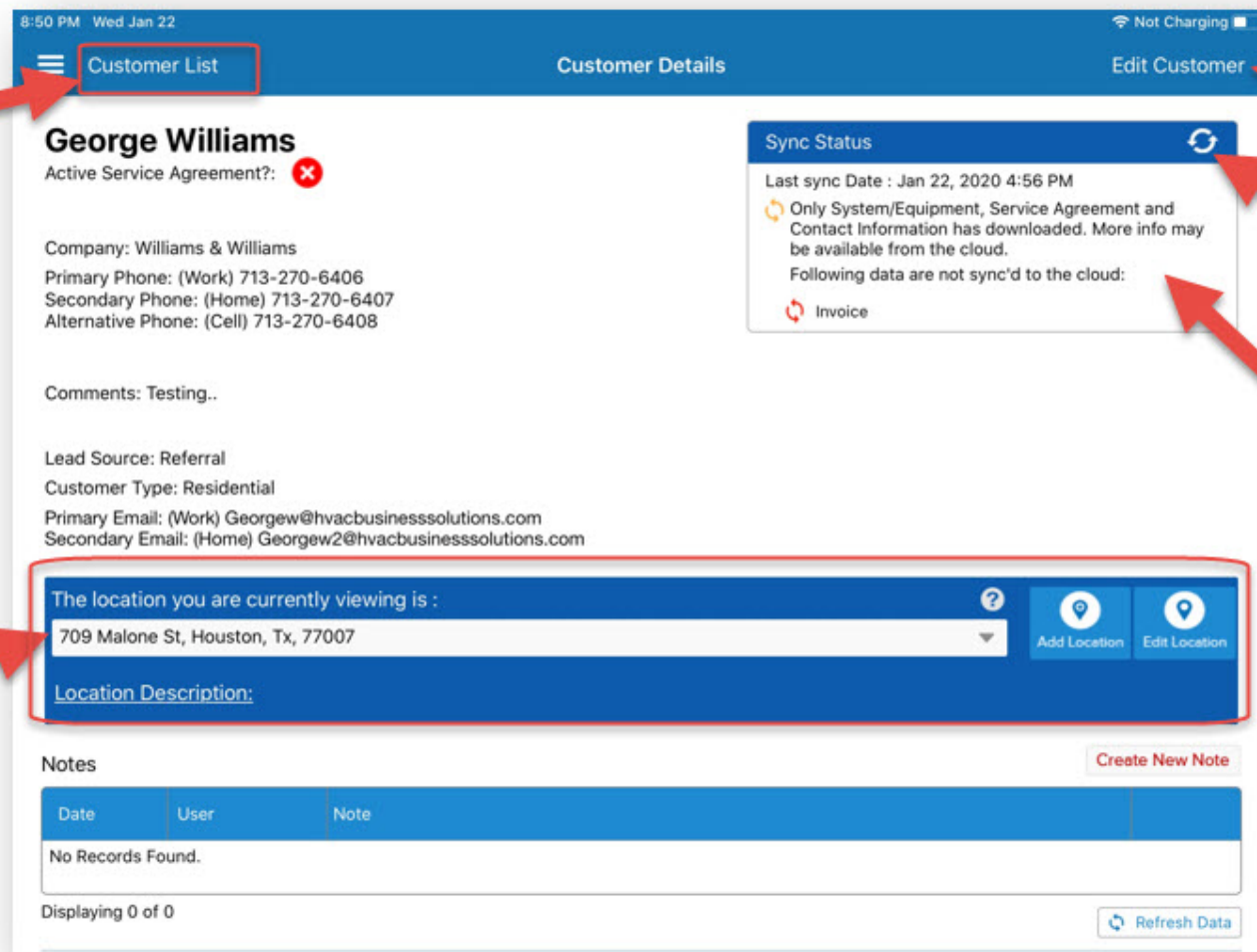
Customer Record – 2/6

A screenshot of the P3 HVAC Software interface showing a 'Customer List' table. The table has columns for Name, Phone#, Email, and Address. A single row is visible for 'Nathan Jones' with phone number '713-270-4544' and address '12999 Murphy Road, Stafford, TX, 77477'. The email column contains a green checkmark. To the right of the row are three icons: a refresh icon, a magnifying glass/view icon, and a trash icon. A red arrow points from the search bar to the 'Cloud' search button. Another red arrow points from the refresh icon to a text box. The text box contains instructions about syncing the customer record. The interface also shows a status bar at the top with the time '3:07 PM Thu Jul 2' and battery level '94%'.

Search here & Click on **Cloud** if customer is not on your calendar.

Sync Status of the Customer Record.
Click the Magnifying Glass/View icon to get to Customer Details page to Sync

Customer Record – 3/6



8:50 PM Wed Jan 22

Customer List Customer Details Edit Customer

George Williams

Active Service Agreement?: ✖

Company: Williams & Williams
Primary Phone: (Work) 713-270-6406
Secondary Phone: (Home) 713-270-6407
Alternative Phone: (Cell) 713-270-6408

Comments: Testing..

Lead Source: Referral
Customer Type: Residential
Primary Email: (Work) Georgew@hvacbusinesssolutions.com
Secondary Email: (Home) Georgew2@hvacbusinesssolutions.com

The location you are currently viewing is :
709 Malone St, Houston, Tx, 77007
Add Location Edit Location

Location Description:

Notes Create New Note

Date	User	Note
No Records Found.		

Displaying 0 of 0 Refresh Data

Click to View Sync Status on all Customers on the Tech's iPad/Tablet

Click to Change Contact Information - Phone, Address, etc

Click to Sync ALL Customer Data

General Sync Status of the Customer Record

Current Location of Customer

Click "Edit Location" to switch to a different property for the same customer

Customer Record – 4/6

The screenshot displays the 'Customer Details' page in the P3 HVAC software. It features several sections: 'Equipment / System' with a table of equipment records, an 'Invoice' section with a table of invoice records, and an 'Equipment Proposals' section at the bottom. The interface includes navigation menus, buttons for creating new records, and status indicators for sync and data availability.

Data Display

- How many records visible
- How many total records
- How to see more records

Arrows Indicate Sync Status

Arrows can be clicked to Sync that Specific Data Record

Click Icon to Download Details from Command Center.

Once Download can Edit,

If Data Missing on App, click here to Download more records from the Command Center

Customer Record – 5/6

3:07 PM Thu Jul 2 94%

Customer List Customer Details Edit Customer

Nathan Jones
Active Service Agreement?: ✘

Company:
Primary Phone: 713-270-4544

Comments: Need to buy new dog.

Lead Source: Referral
Customer Type: Filter Reminder
Primary Email: nathan@hvacbusinesssolutions.com

The location you are currently viewing is :
12999 Murphy Road, Stafford, TX, 77477 (Primary Location) Add Location Edit Location

Location Description:

Notes Create New Note

Date	User	Note
No Records Found.		

Displaying 0 of 0 Refresh Data

Equipment / System View All (1) Create New Equipment Create New System

Sync Status 🔄

Last sync Date : Jul 2, 2020 3:06 PM

🔄 Only System/Equipment, Service Agreement and Contact Information has downloaded. More info may be available from the cloud.

Following data are not sync'd to the cloud:

- 🔄 Invoice

Overall Sync status for the Customer.

This syncs ALL data for the customer - Yellow and Red.

Customer Record – 6/6

3:07 PM Thu Jul 2 94%

Customer List Customer Details Edit Customer

Equipment / System View All (+) Create New Equipment Create New System

System ?	Equip.Type	Make	Model	Serial Number	Install Date	
downstairs	A/C - Condenser	rheem	rftghh			
downstairs	Evaporator Coil					
downstairs	Furnace					

Displaying 3 of 5 Refresh Data

Invoice Create New Invoice

Invoice No	Invoice Date	Name	Payment Method	Invoice Status	Amount Owed	Amount	Email Sent?	
AESMB1202	Jul 2, 2020	Aaron Adams		Estimate		\$89.00		

Displaying 1 of 1 Refresh Data

Equipment Proposals

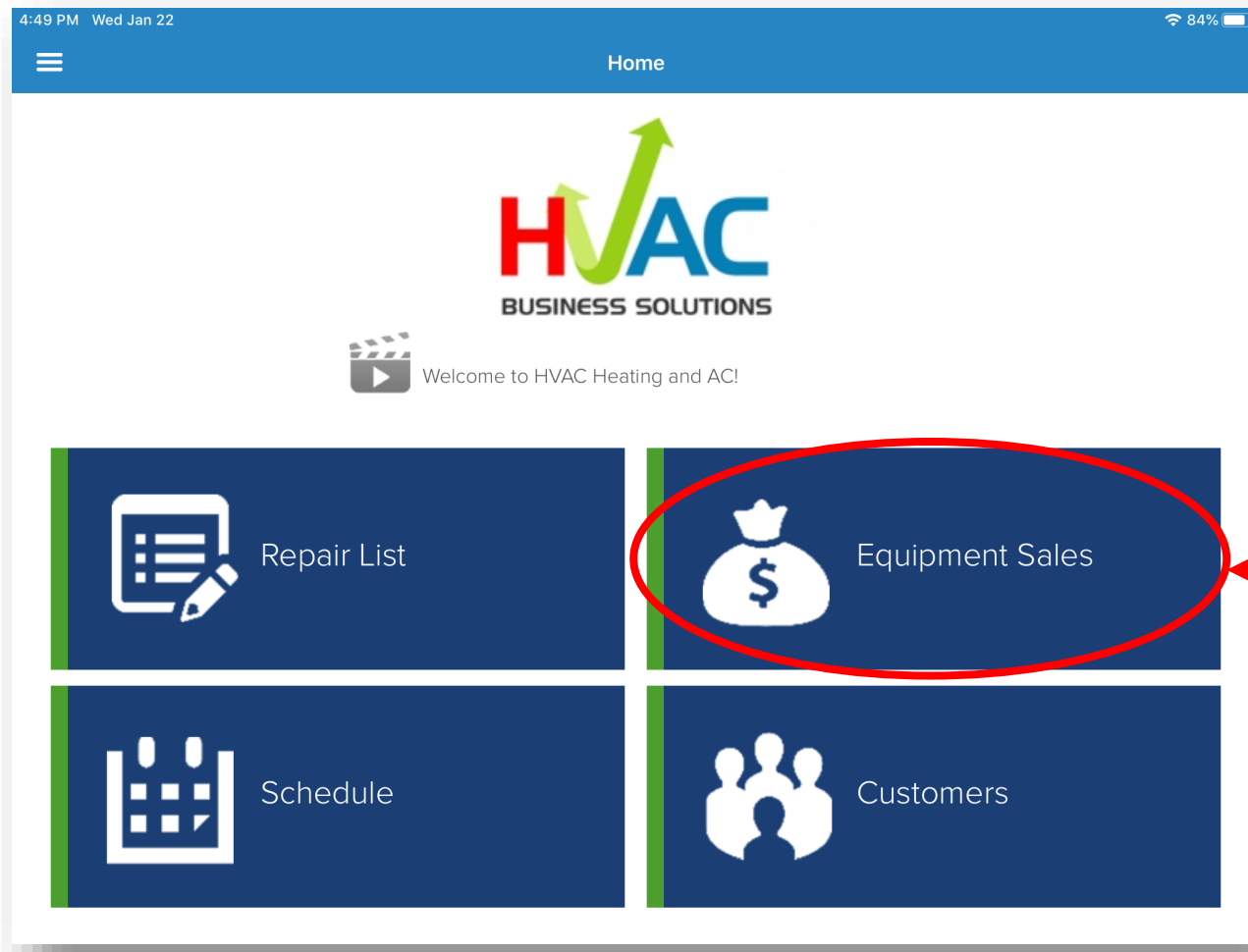
Proposal Number	Proposal Date	Technician Name	Customer Name	Equipment Type	Proposal Amount	Status
No Records Found.						

Displaying 0 of 0 Refresh Data

Service Agreements

Any data with red arrows is on the App only and not in the Command Center. Click the arrows to sync that specific data - in this case, the invoice.

Proposals – 1/5



Proposals – 2/5

The screenshot shows the ESM Dashboard interface. At the top, it displays the time (5:14 PM), date (Wed Jan 22), and battery level (74%). The dashboard includes two summary cards: 'Overdue' with a total of \$0.00 and 'Honey Do List' with a total of \$0.00. Below these are four main action buttons: 'Create New', 'View All', 'View Open', and 'View Closed'. Red callout boxes provide context for each element: 'ESM = "Equipment Sales Module"' points to the dashboard title; 'Create New Proposal' points to the 'Create New' button; 'View to Manage Proposals that have not been Accepted or Declined' points to the 'View Open' button; 'View to Manage ALL Proposals regardless of Status' points to the 'View All' button; and 'View Won or Lost Proposals' points to the 'View Closed' button.

Proposals – 3/5

Customize Proposal Titles in Command Center

- Click Settings
- Click Brand/Series
- Open Brand
- Open Series
- Edit Proposal Name

Sync to Command Center

Click to View Good/Better/Best Options

Emails this Option Only

9:07 PM Wed Jan 22

View Proposal

Sync

HVAC Heating and Cooling, LLC
 Licence No: ddd
 12999 Murphy Rd
 Stafford, TX 77477
 713-270-6400
 brian@hvacbusinesssolutions.com
 www.hvacbusinesssolutions.com

PROPOSAL (Gold)
FOR
Gold 17 AC - Slab Coil w/TXV - 80 MBTU Gold 80 Variable Speed Communicating Gas Furnace

Proposal#: [redacted]
 Date: July 31, 2017
 Customer: Jason Jones

Installation Address:
 10701 Corporate Drive, Stafford, TX 77477
 713-270-6400
 brianjason@businesssolutions.com

Compare Proposals Follow Up Email

★★★★★

\$297.86/month
 Estimated monthly payment for qualified buyers.

This system provides incredible energy efficiency and quiet, efficient heat saving you on operating costs and the highest level of performance and comfort with the help of a strong and sturdy all-aluminum indoor coil keeping your entire home cozy.

Features

R410A refrigerant

Price	
Financed Price:	\$11,740.80
Cash Discount:	-\$587.04
Cash Price:	\$11,153.76

Proposals – 4/5

4:04 PM Thu Jul 2
View Proposal
Sync

Sync an individual proposal.

HVAC Heating and Cooling, LLC
 Licence No: ddd
 12999 Murphy Rd
 Stafford, TX 77477

713-270-6400
 test2@hvacbusinesssolutions.com
 www.hvacbusinesssolutions.com

PROPOSAL (Platinum)
American Standard
3 Ton Gold 17 Air Conditioner

Proposal#: AESMB11A
 Date: June 30, 2020
 Customer: Christine Johnson

Installation Address:
 10701 Corporate Drive, Stafford, Texas, 77477
 713-270-6400
 christine@hvacbusinesssolutions.com

Compare Proposals

Follow Up

Email

★★★★★

\$233.64/month
 Estimated monthly payment for qualified buyers.

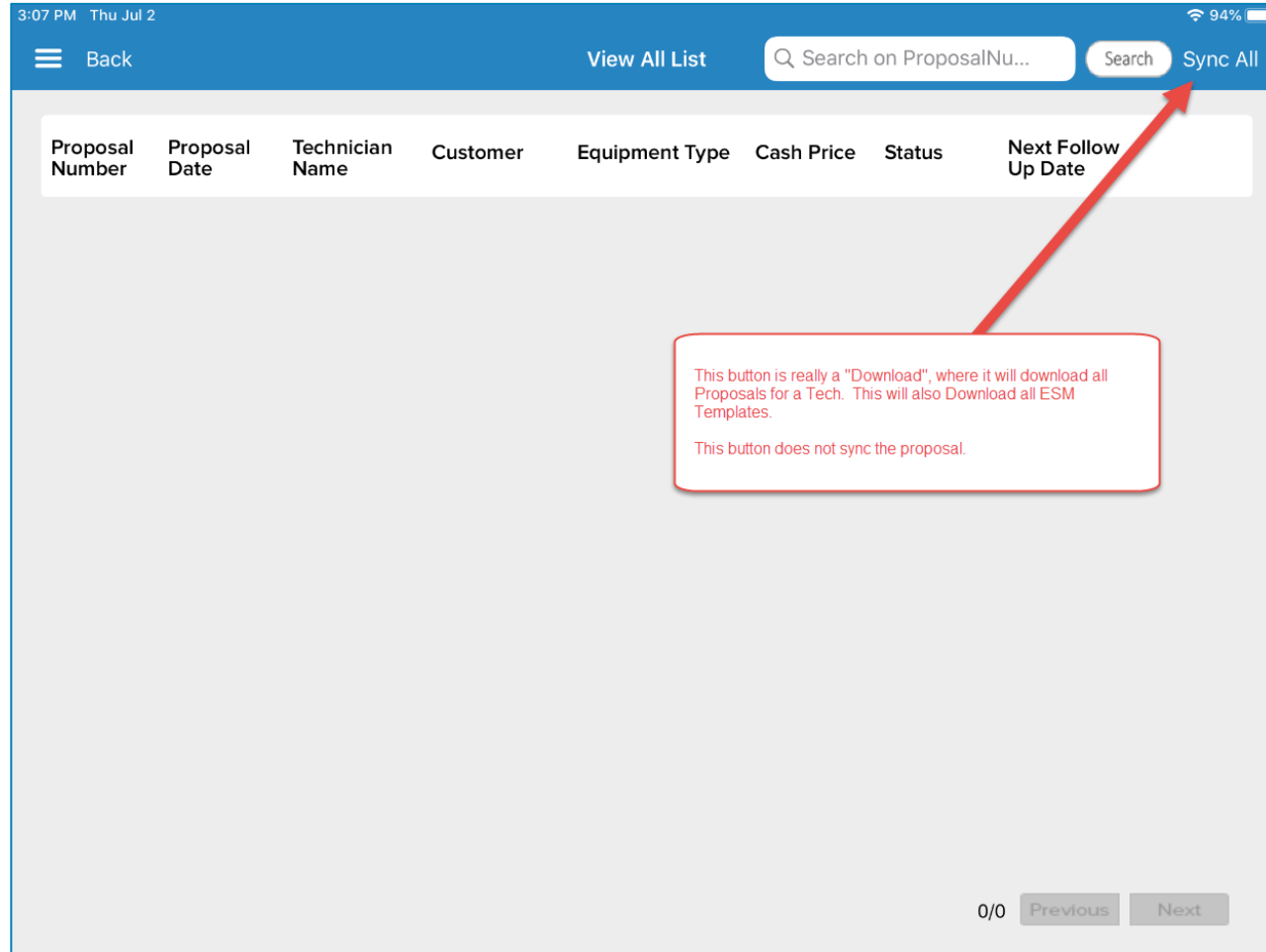
This home cooling system's design keeps you comfortable, thanks to generous two-step cooling. Plus, with ratings up to 18 SEER, this central air system provides incredible energy efficiency saving you on operating costs.

Features

All-aluminum Spine Fin coil
 Durabase basepan
 Single-speed fan motor
 Heavy-duty steel louvered panels

\$ Price	
Cash Price:	\$6,501.28

Proposals – 5/5

A screenshot of the P3 HVAC Software interface. The top bar shows the time '3:07 PM Thu Jul 2' and battery level '94%'. Below the bar are navigation options: 'Back', 'View All List', a search bar with 'Search on ProposalNu...', a 'Search' button, and a 'Sync All' button. A table with columns for 'Proposal Number', 'Proposal Date', 'Technician Name', 'Customer', 'Equipment Type', 'Cash Price', 'Status', and 'Next Follow Up Date' is visible. A red arrow points from a text box to the 'Sync All' button. The text box contains the following text:

This button is really a "Download", where it will download all Proposals for a Tech. This will also Download all ESM Templates.

This button does not sync the proposal.

At the bottom right, there is a '0/0' indicator and 'Previous' and 'Next' buttons.