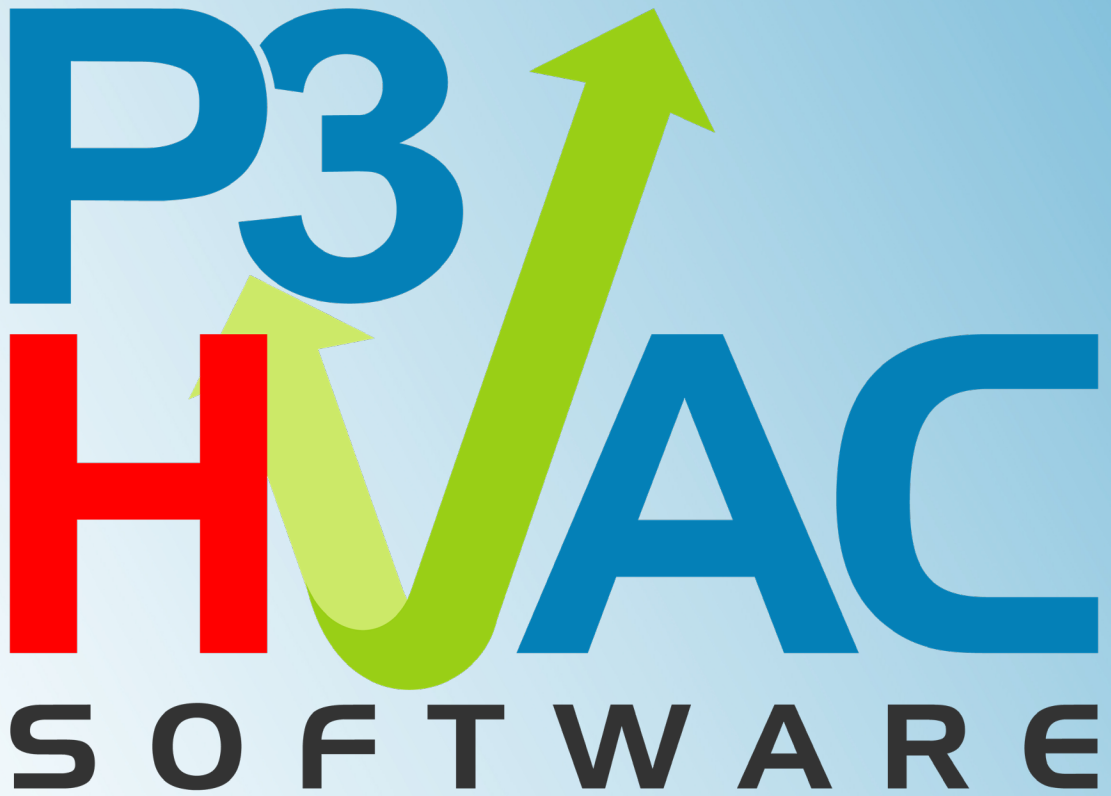
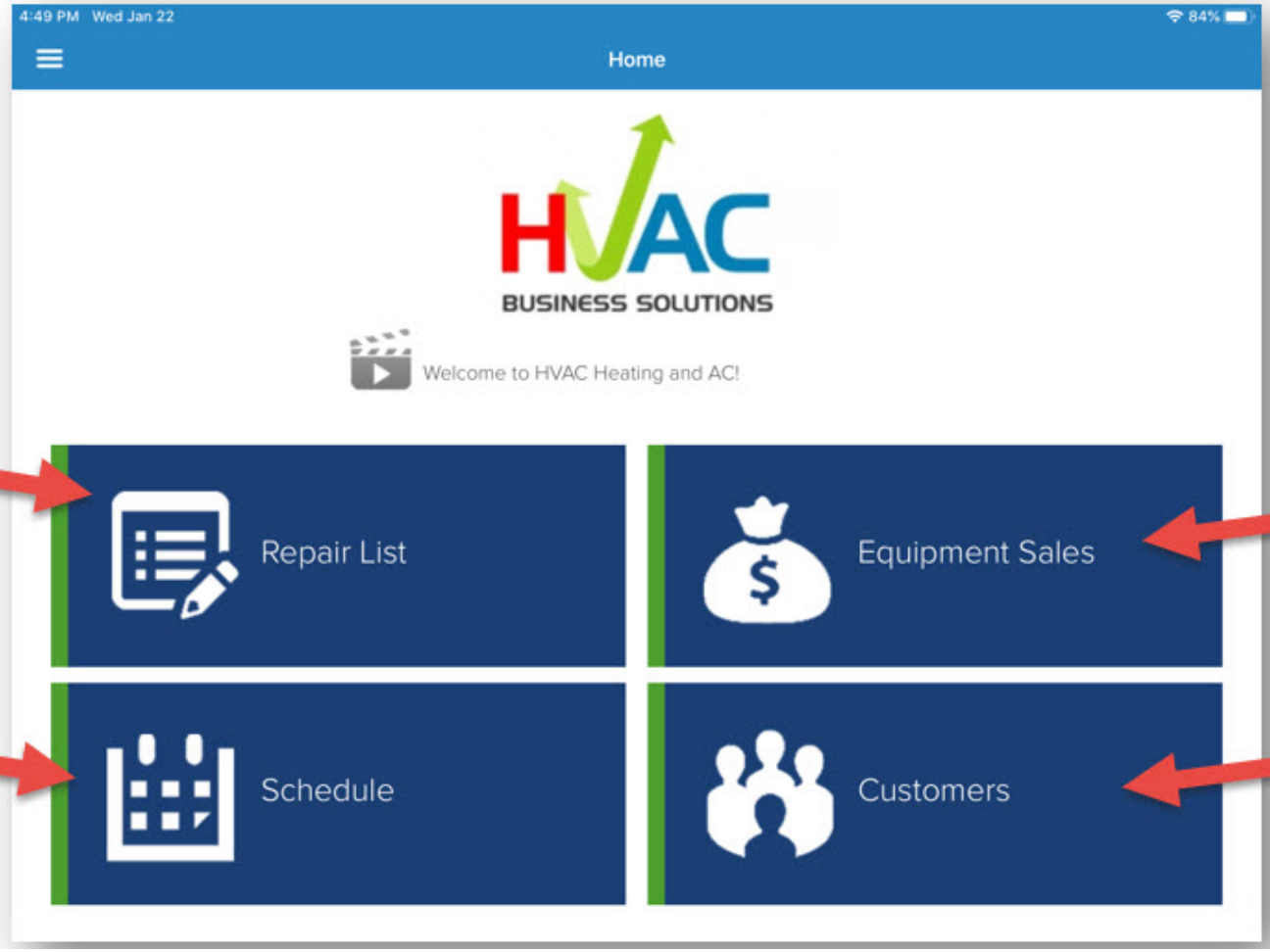

P3
HVAC
SOFTWARE

App Home Page – 1/3

App Home Page – 2/3

App Home Page – 3/3



To View Repair Pricing

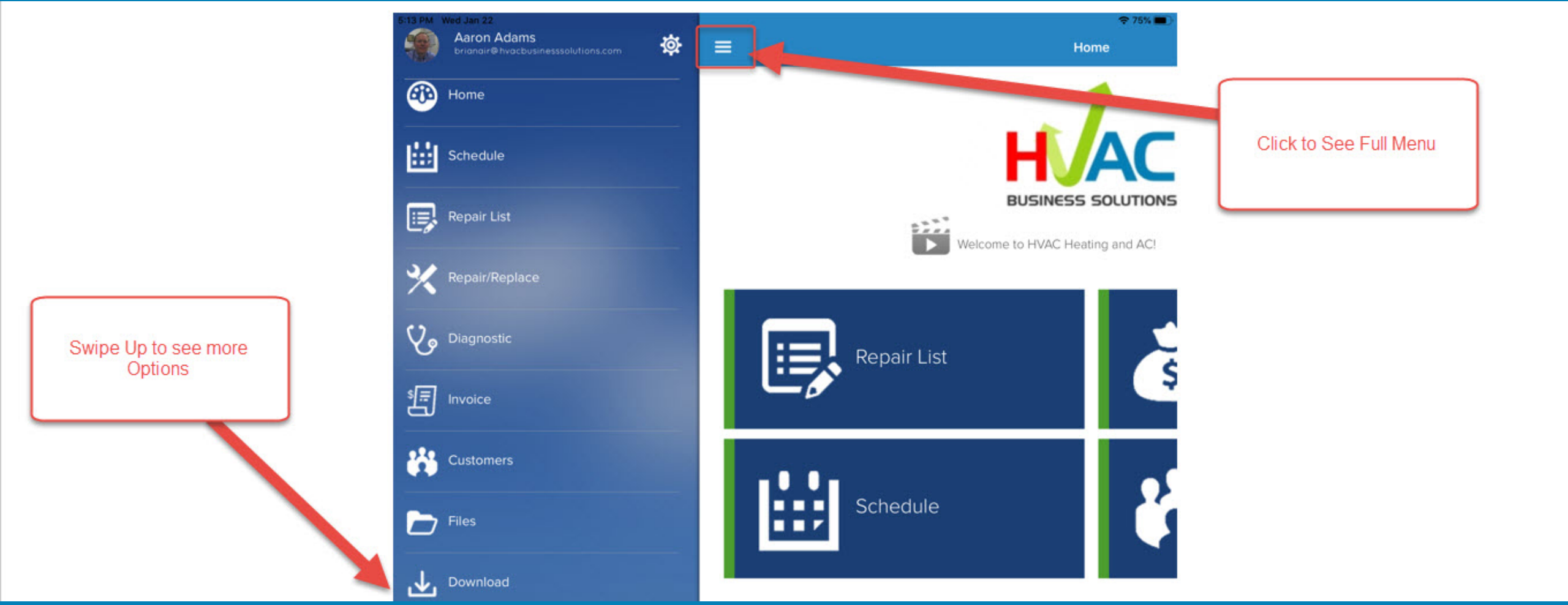
For Technician to View Daily Schedule

To Generate Equipment Proposals

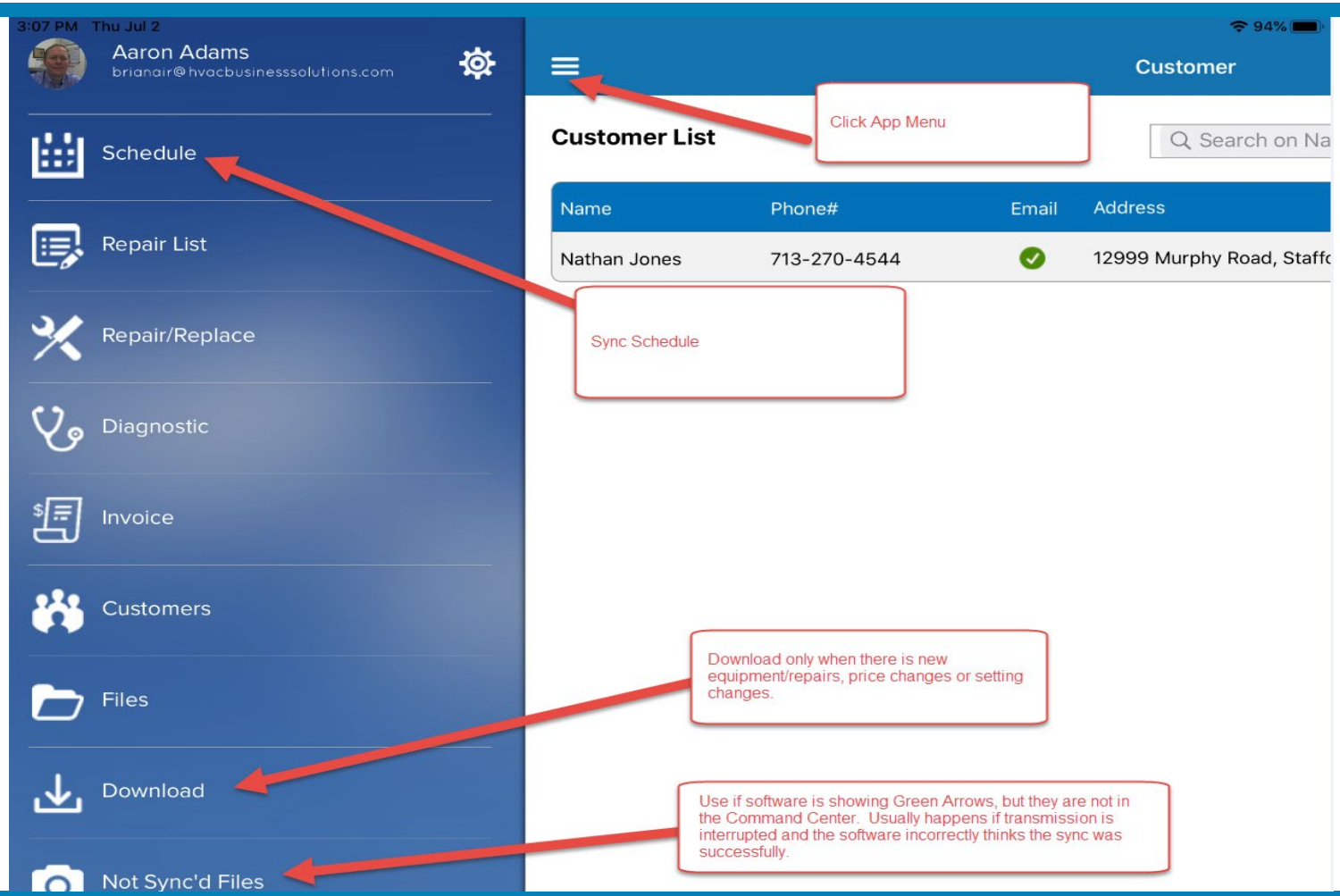
To Find Customers

(Used Most Often By Owner Operators)

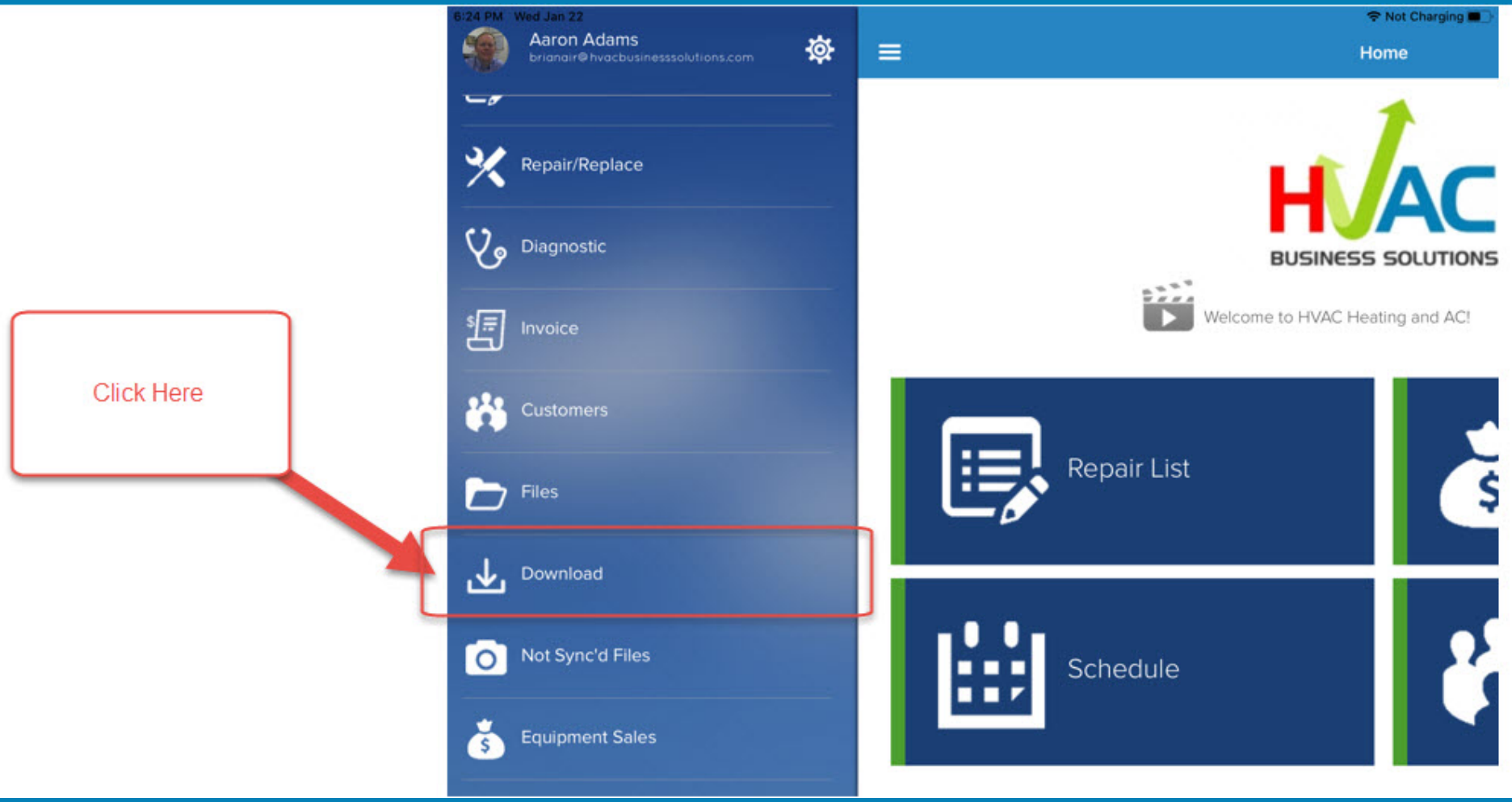
App Menu – 1/2


Aaron Adams
Home
Schedule
Repair List
Repair/Replace
Diagnostic
Invoice
Customers
Files
Download
Home
BUSINESS SOLUTIONS
Welcome to HVAC Heating and AC!
Repair List
Schedule
Click to See Full Menu
Swipe Up to see more Options

App Menu – 2/2


3:07 PM Thu Jul 2
94%
Aaron Adams
brianair@hvacbusinesssolutions.com
Schedule
Repair List
Repair/Replace
Diagnostic
Invoice
Customers
Files
Download
Not Sync'd Files
Customer
Customer List
Search on Na
Name
Phone#
Email
Address
Nathan Jones
713-270-4544
12999 Murphy Road, Staffo
Click App Menu
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.

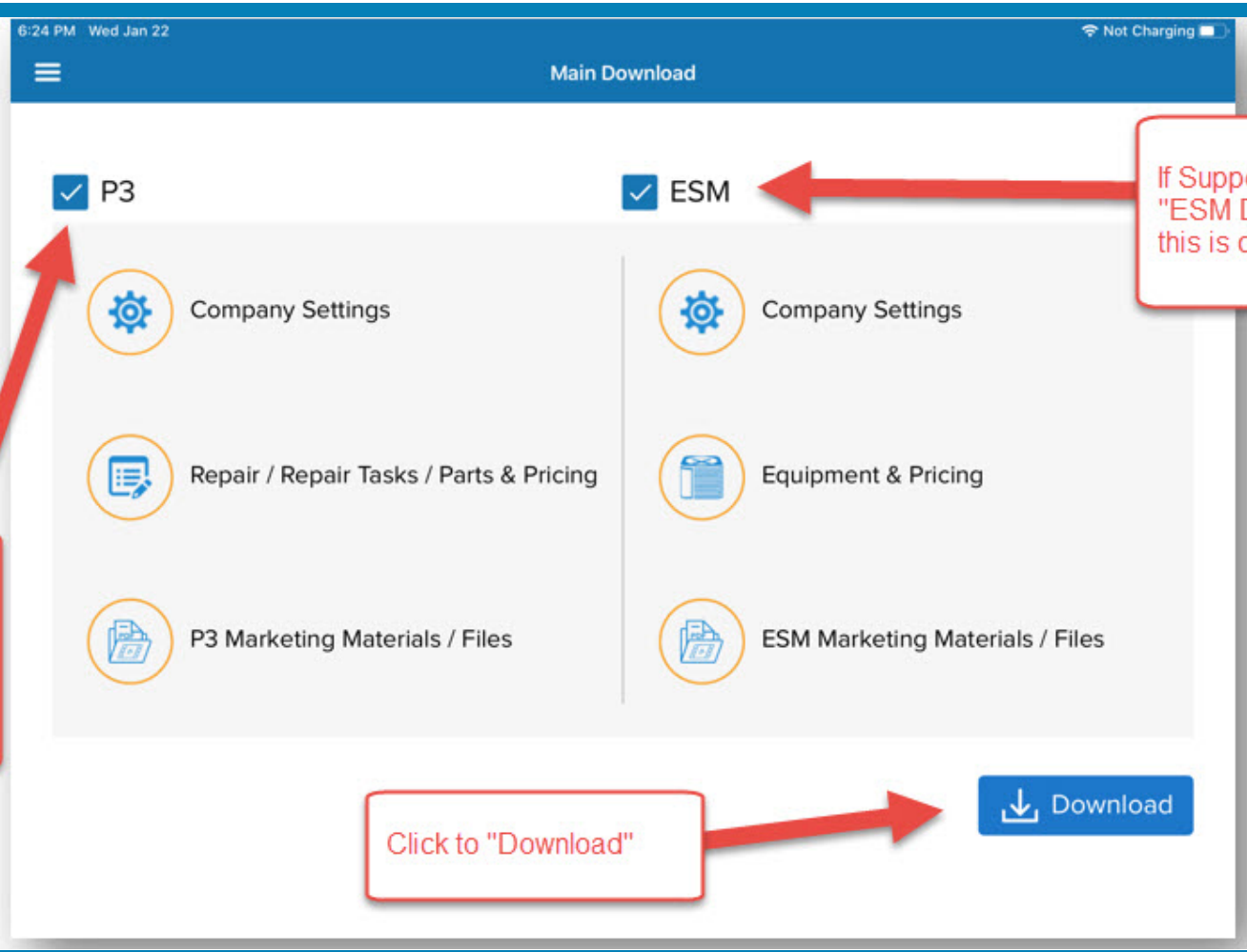
Download – 1/2


Click Here
6:24 PM Wed Jan 22
Aaron Adams
brianair@hvacbusinesssolutions.com
Repair/Replace
Diagnostic
Invoice
Customers
Files
Download
Not Sync'd Files
Equipment Sales
Not Charging
Home
HVAC
BUSINESS SOLUTIONS
Welcome to HVAC Heating and AC!
Repair List
Schedule

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



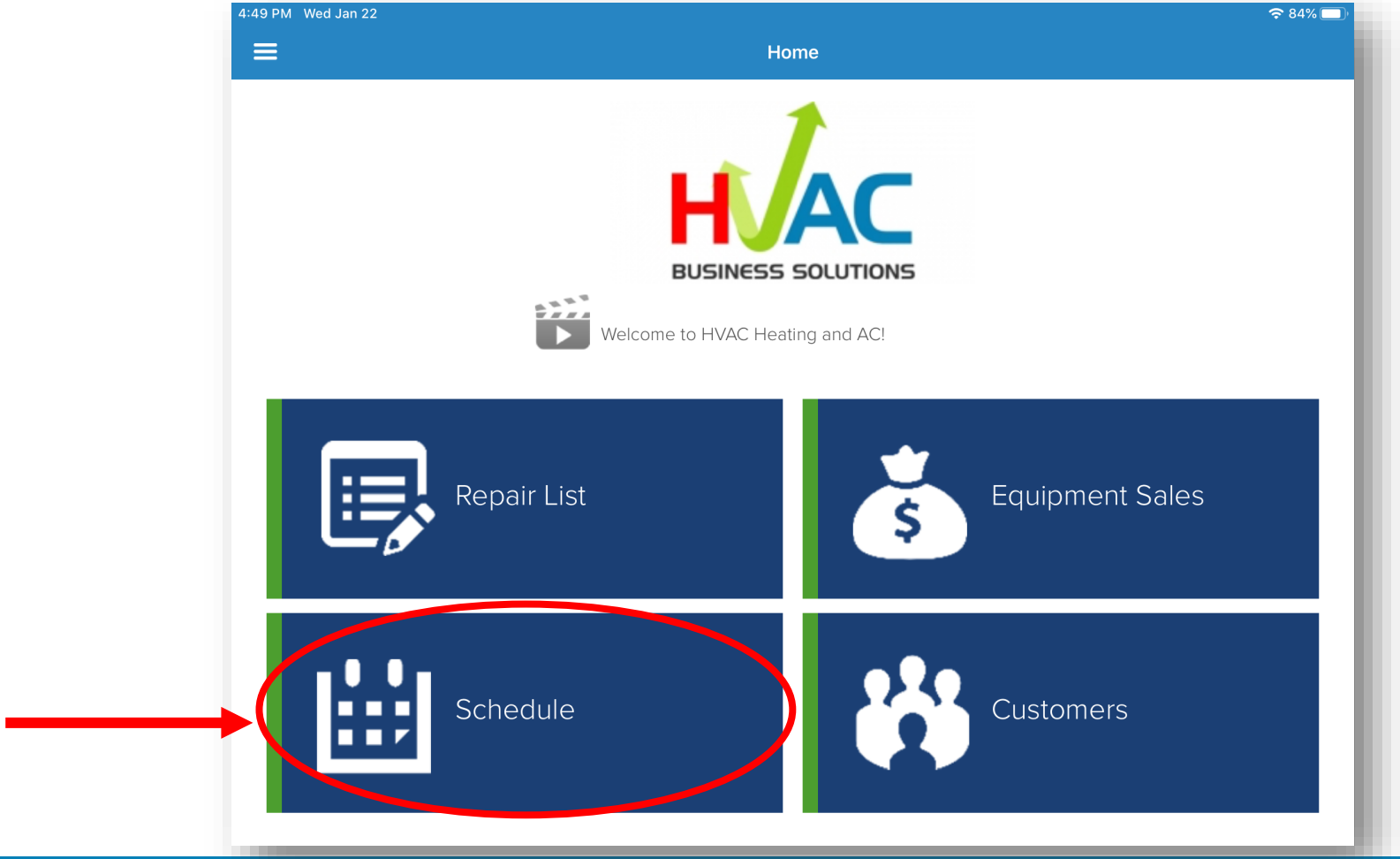
If Support says to complete a "ESM Download", make sure this is checked.

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

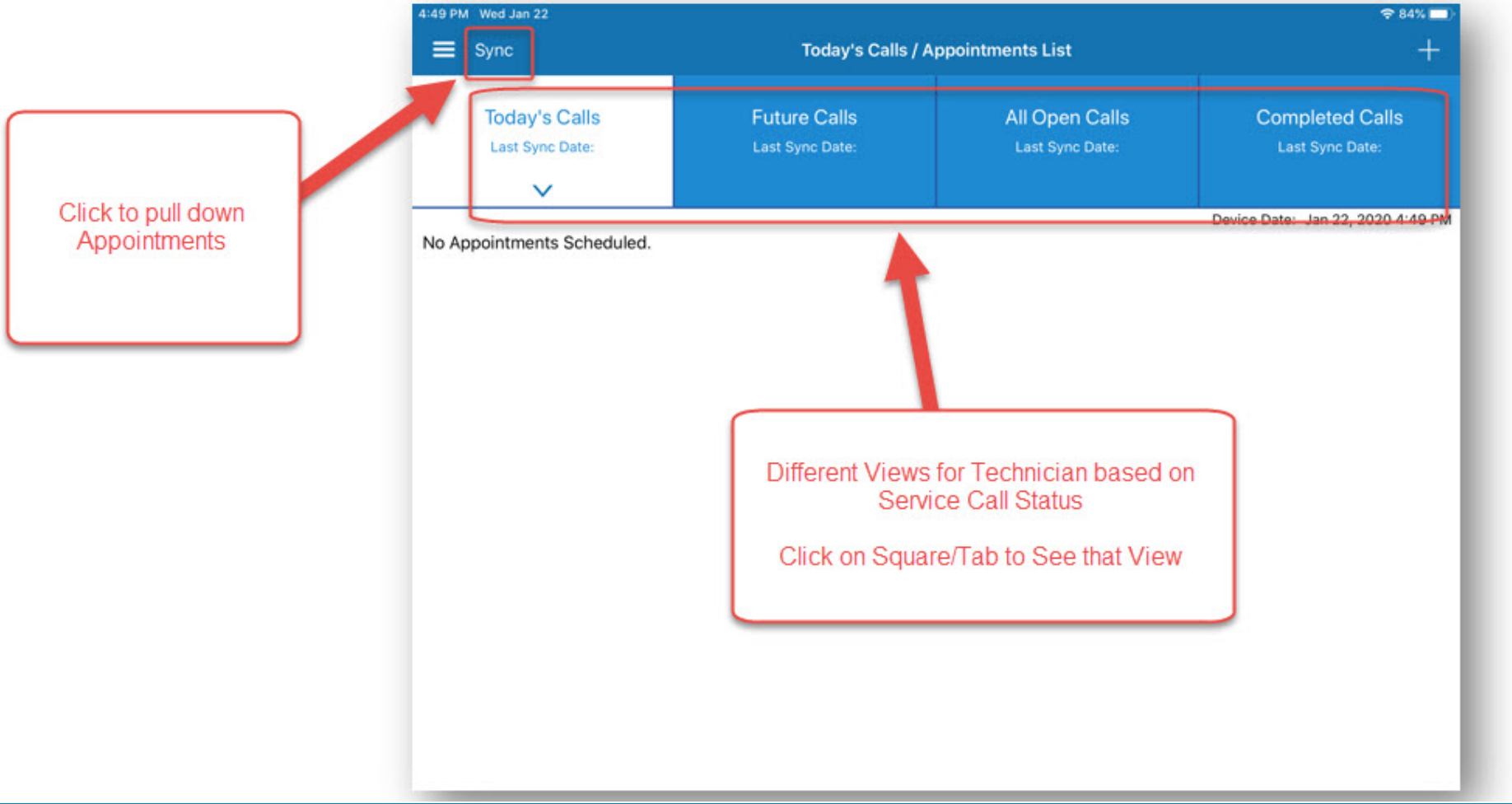
If Support says to complete a "Full Download", make sure BOTH are checked.

Click to "Download"

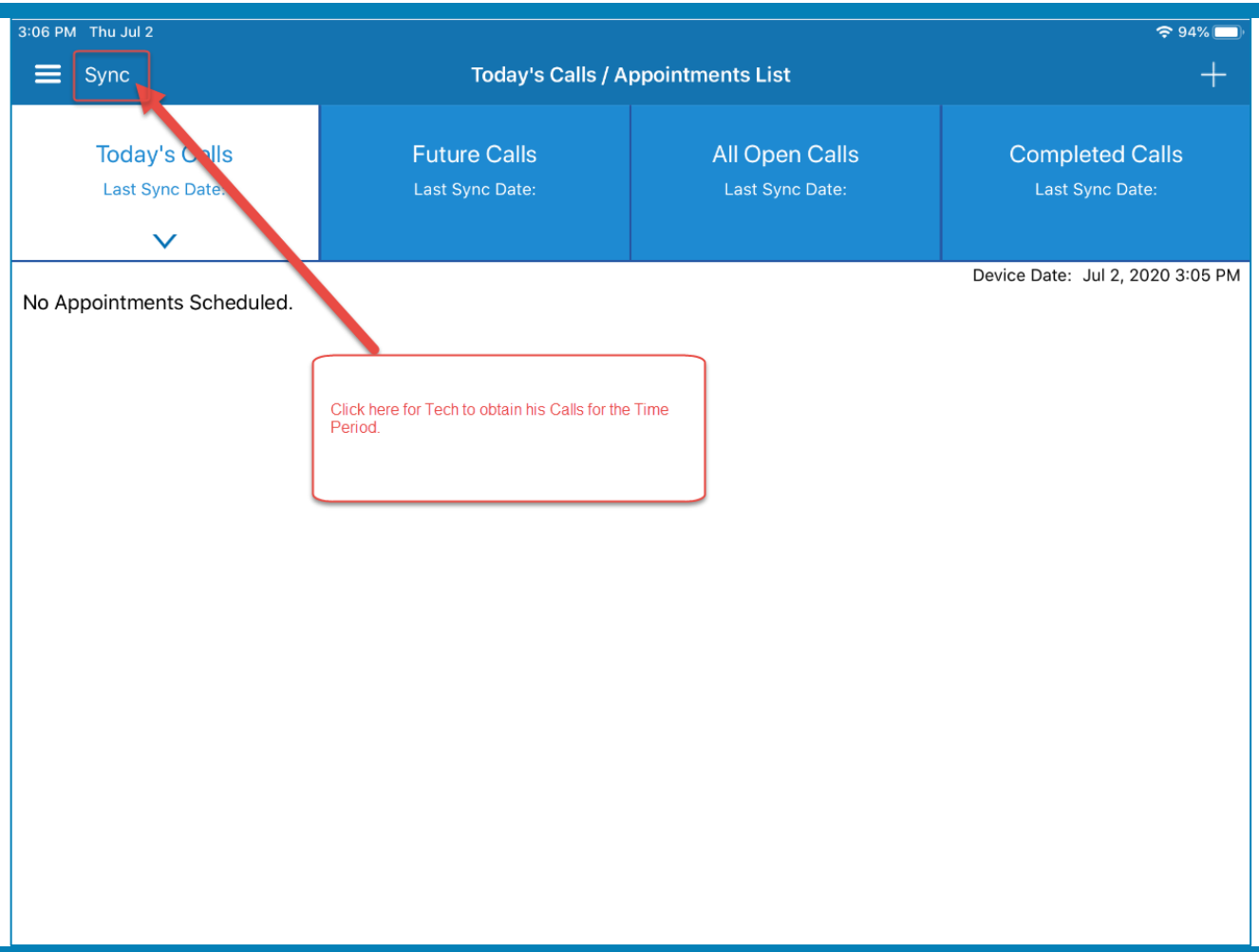
Service Calls – 1/6



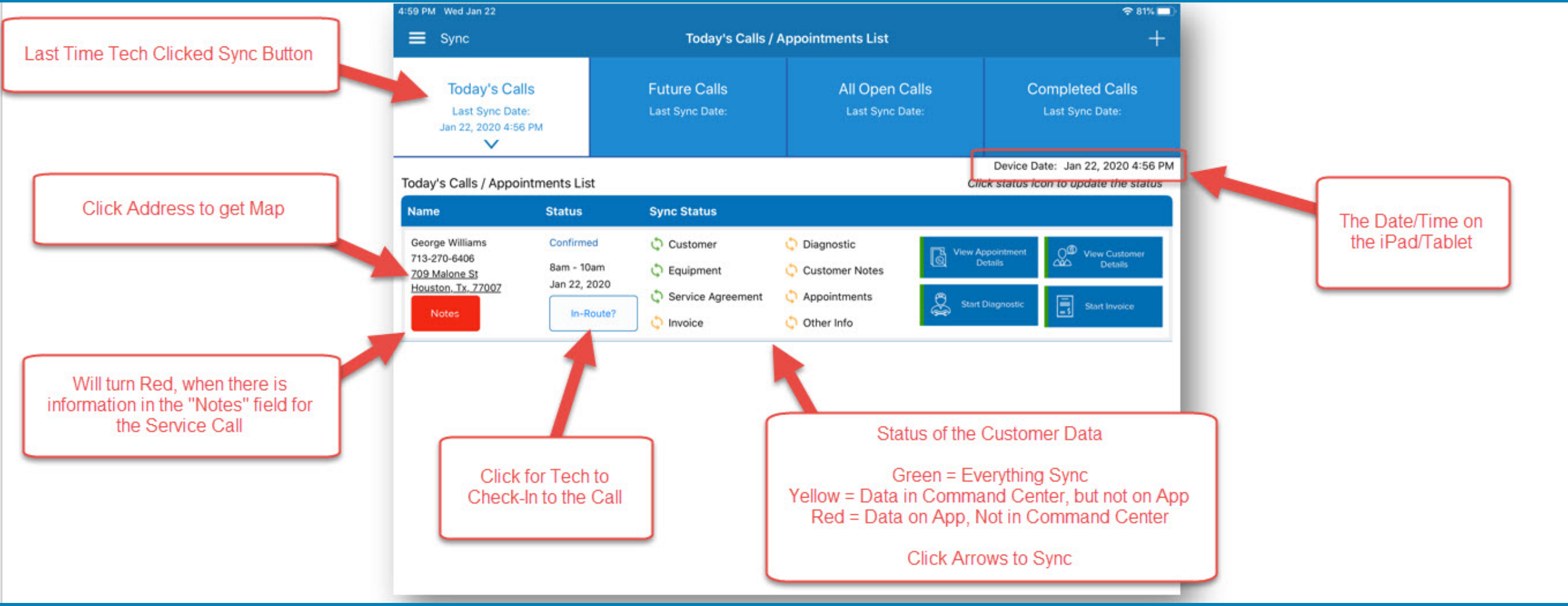
Service Calls – 2/6



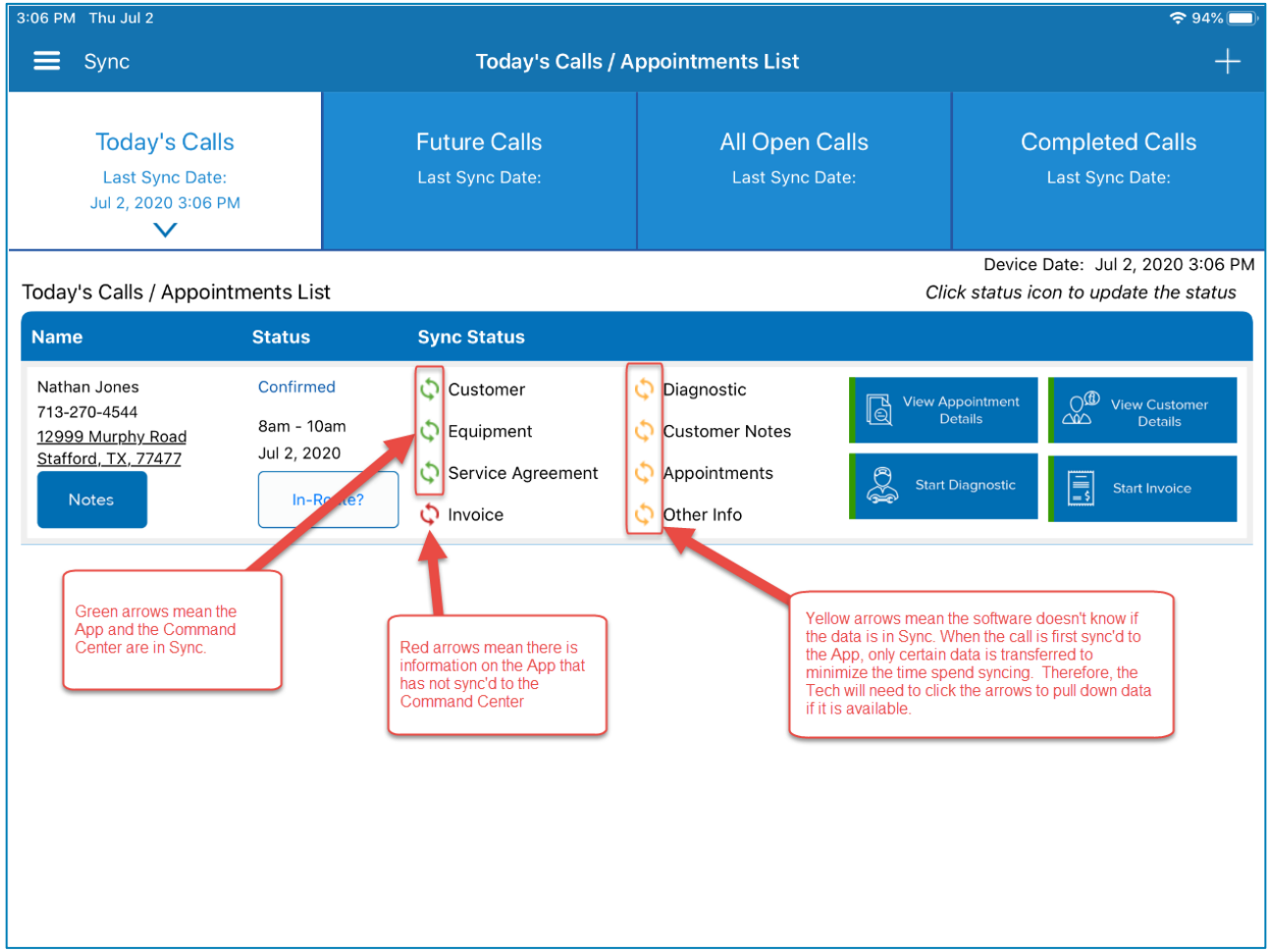
Service Calls – 3/6



Service Calls – 4/6



Service Calls – 5/6

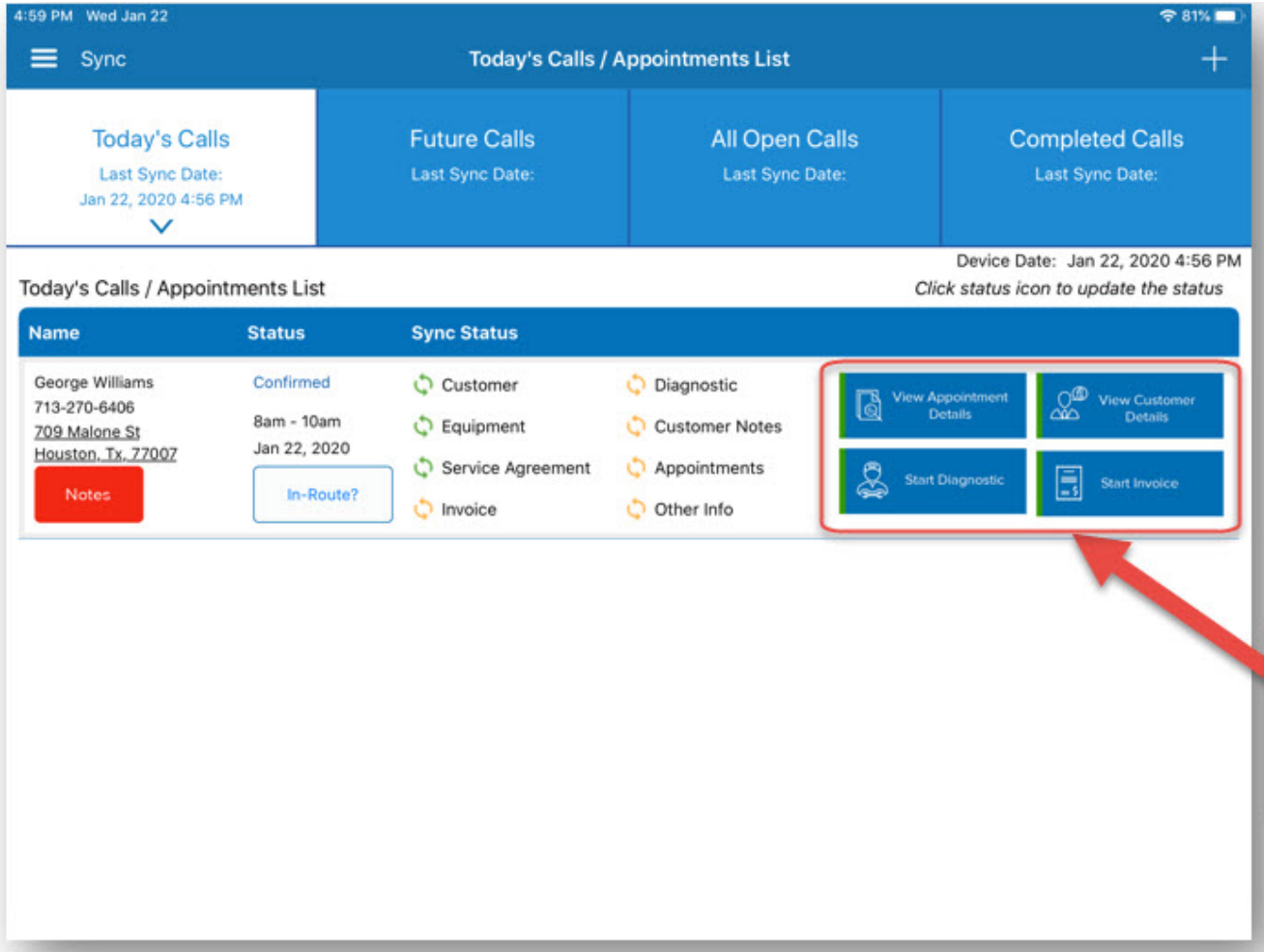


Service Calls – 6/6

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



Main Activities for the Call

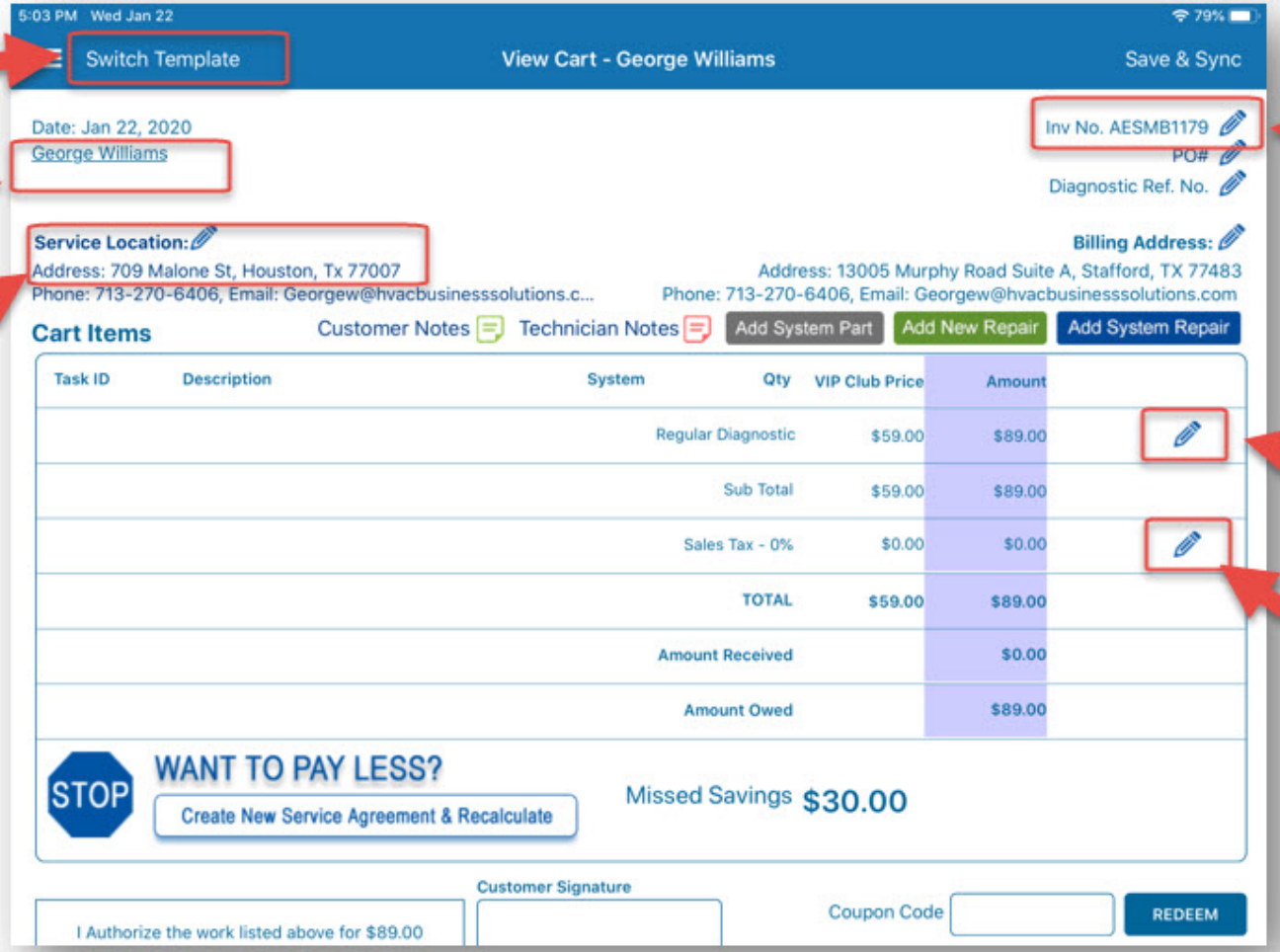
Invoice – 1/3

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



Invoice #
Letters=Tech identification
Numbers = Invoice Number

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

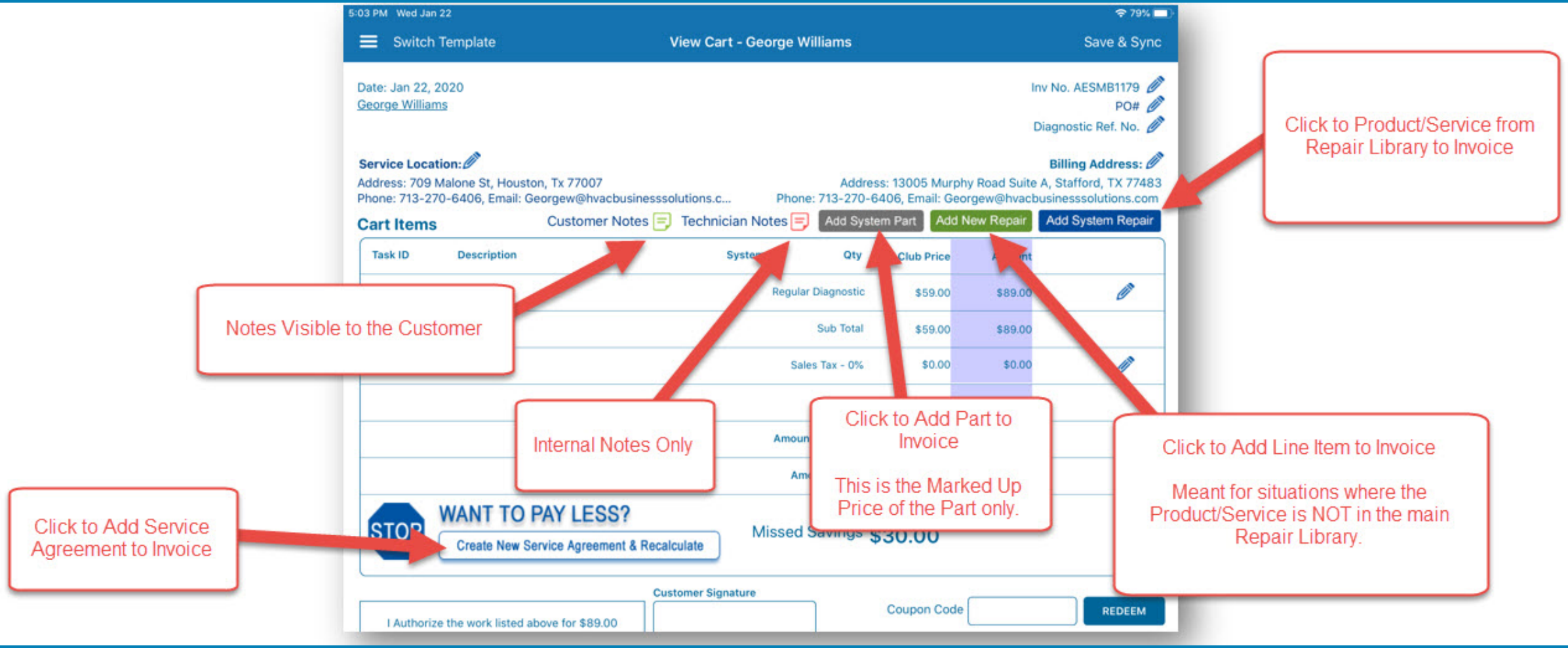
Set when booking Service Call.

Click Pencil to Change for this Invoice.

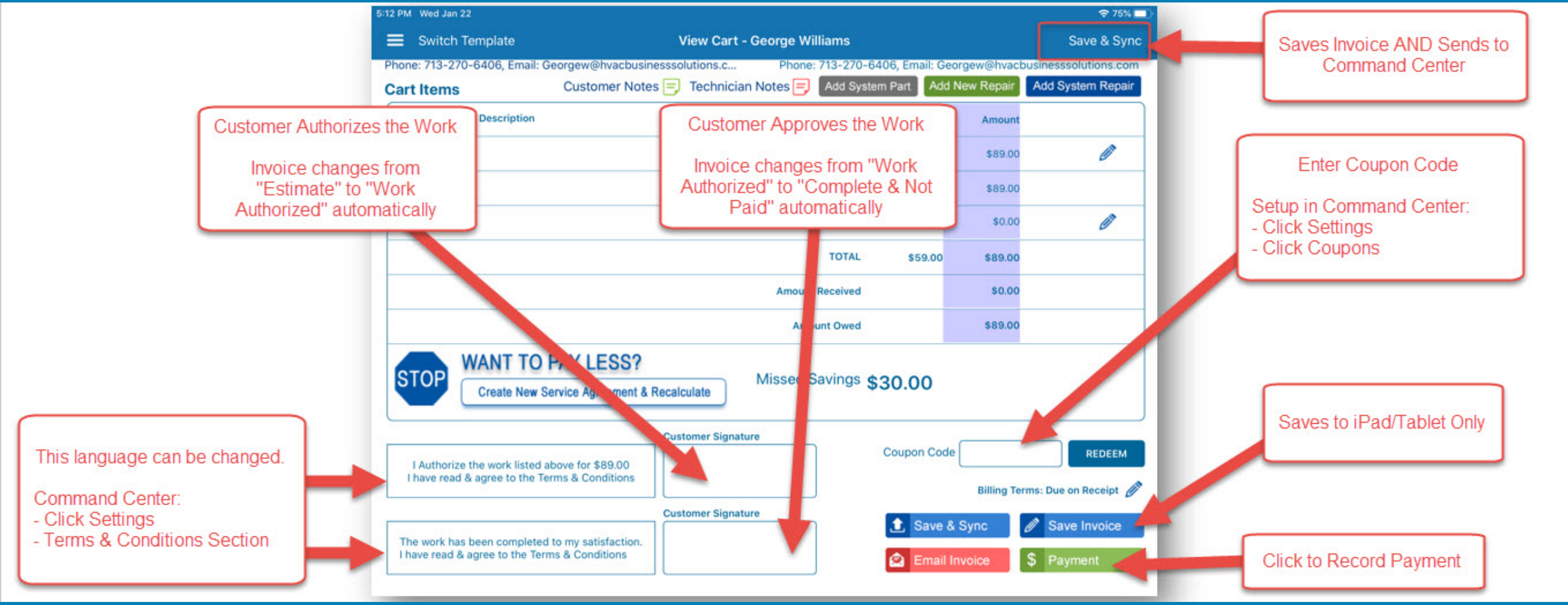
Set in Customer Record

Click Pencil to Change for this Invoice

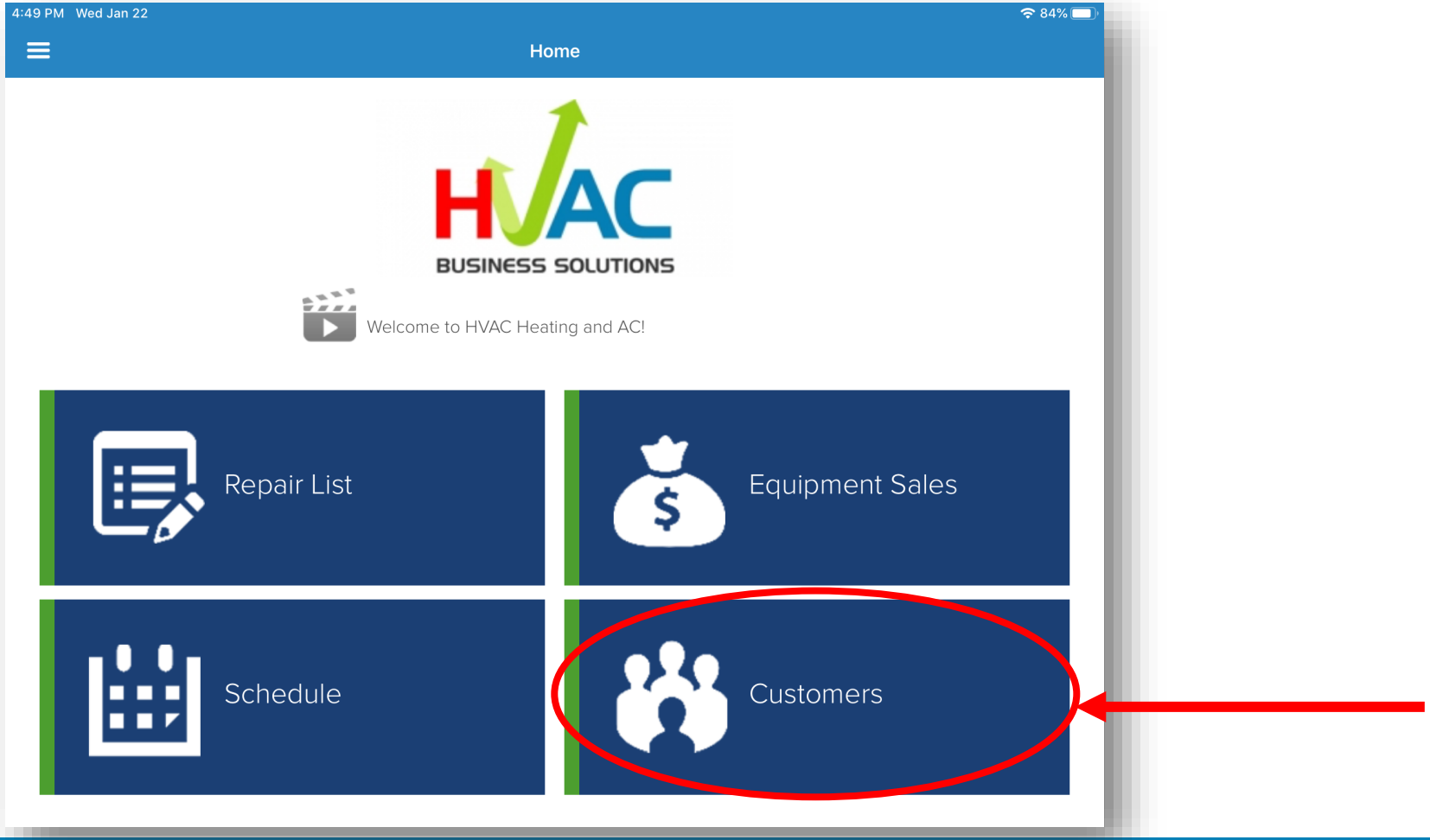
Invoice – 2/3


5:03 PM Wed Jan 22
79%
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
Qty
Club Price
Regular Diagnostic
$59.00
$89.00
Sub Total
$59.00
$89.00
Sales Tax - 0%
$0.00
$0.00
STOP
WANT TO PAY LESS?
Create New Service Agreement & Recalculate
Missed Savings $30.00
Customer Signature
I Authorize the work listed above for $89.00
Coupon Code
REDEEM
Click to Product/Service from Repair Library to Invoice
Notes Visible to the Customer
Internal Notes Only
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 Add Service Agreement to Invoice

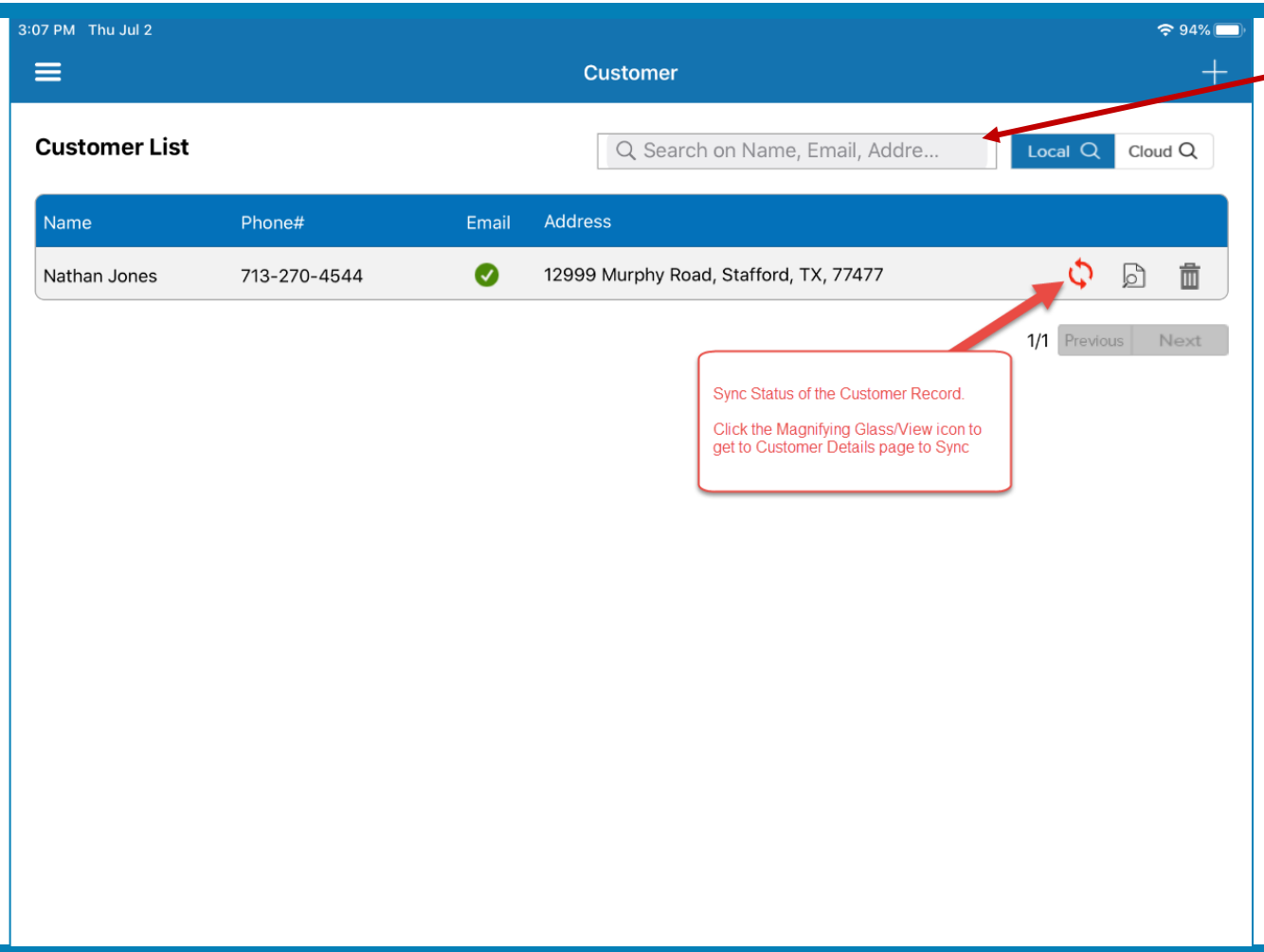
Invoice – 3/3


Saves Invoice AND Sends to Command Center
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
Enter Coupon Code
Setup in Command Center:
- Click Settings
- Click Coupons
Saves to iPad/Tablet Only
This language can be changed.
Command Center:
- Click Settings
- Terms & Conditions Section
Click to Record Payment
5:12 PM Wed Jan 22
75%
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
$89.00
Amount Received
$0.00
Amount Owed
$89.00
STOP
WANT TO PAY LESS?
Create New Service Agreement & Recalculate
Missed Savings $30.00
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 Record – 1/6

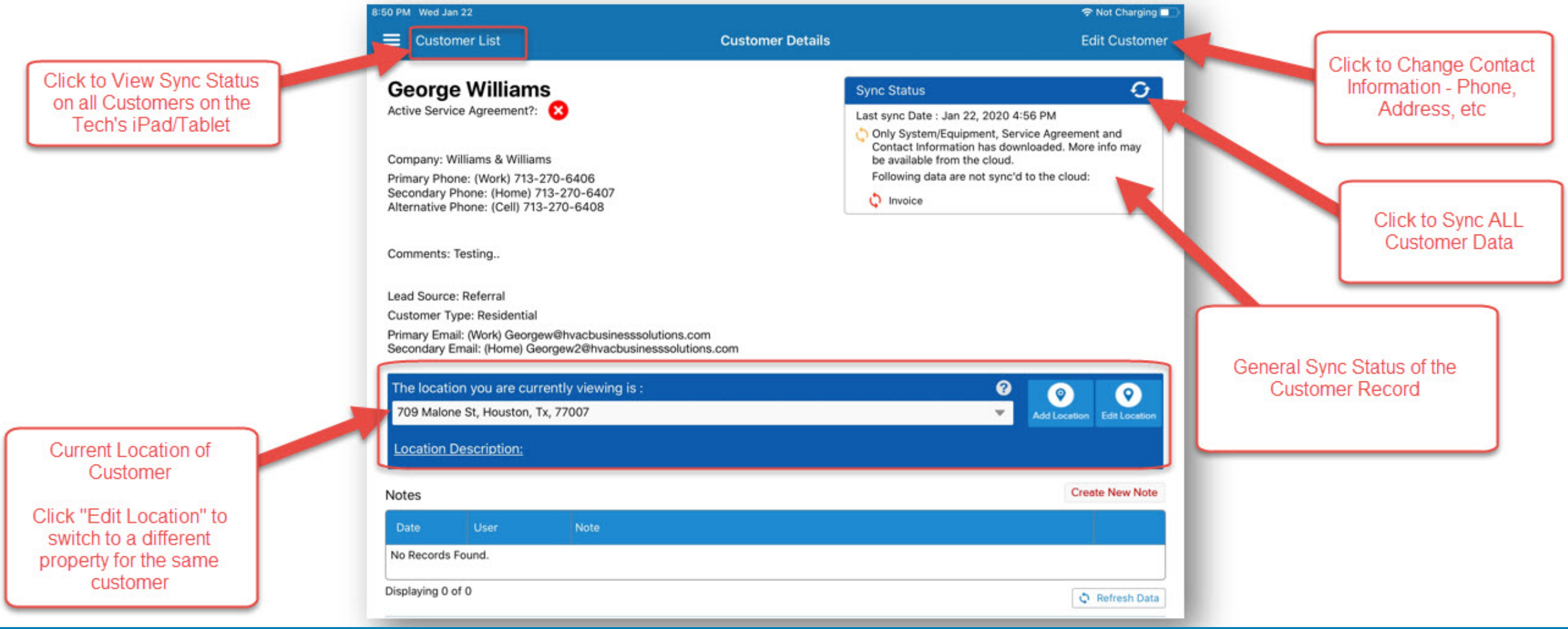


Customer Record – 2/6

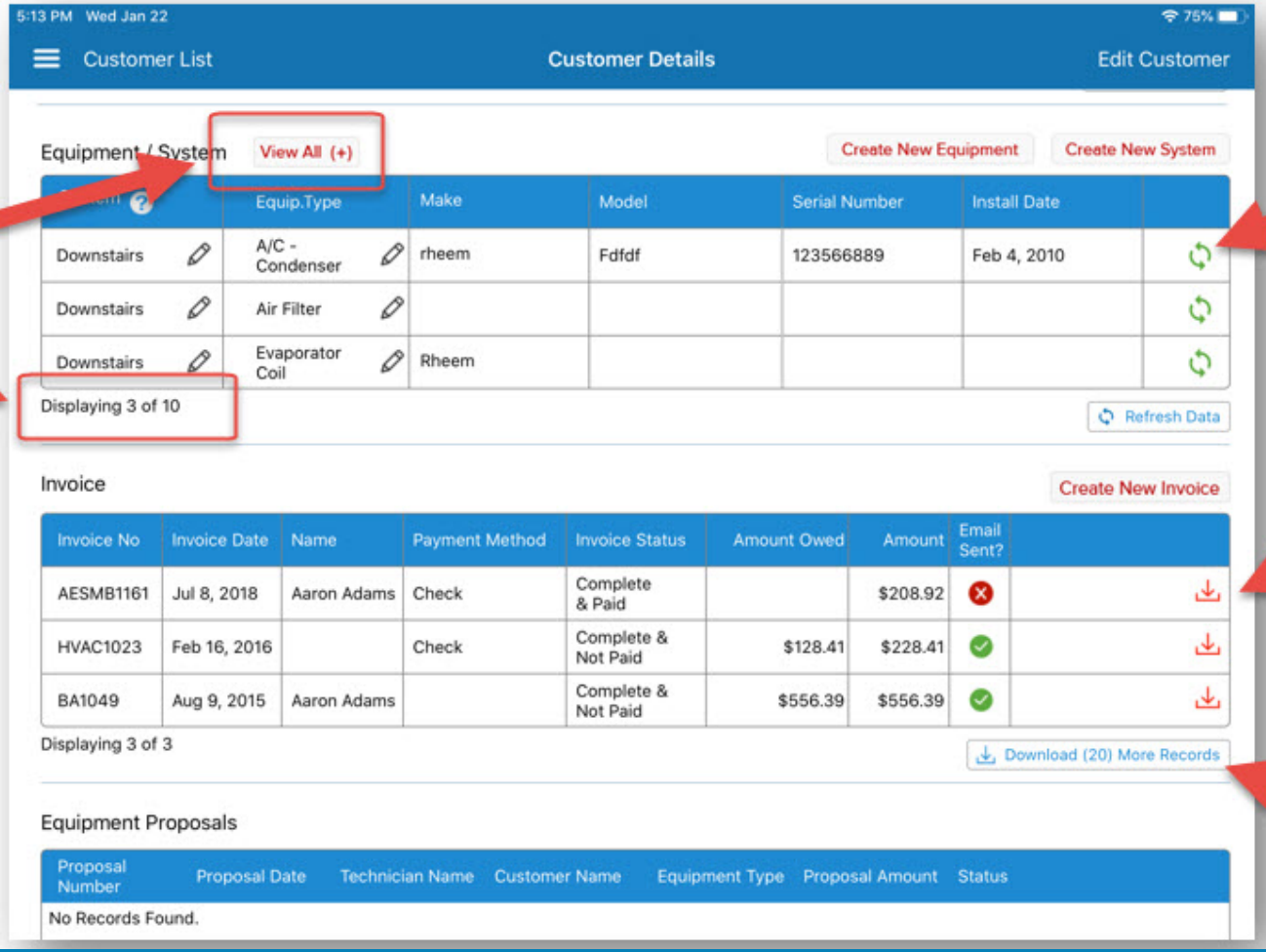


Search here & Click on **Cloud** if customer is not on your calendar.

Customer Record – 3/6



Customer Record – 4/6



Data Display

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

Arrows Indicate Sync Status

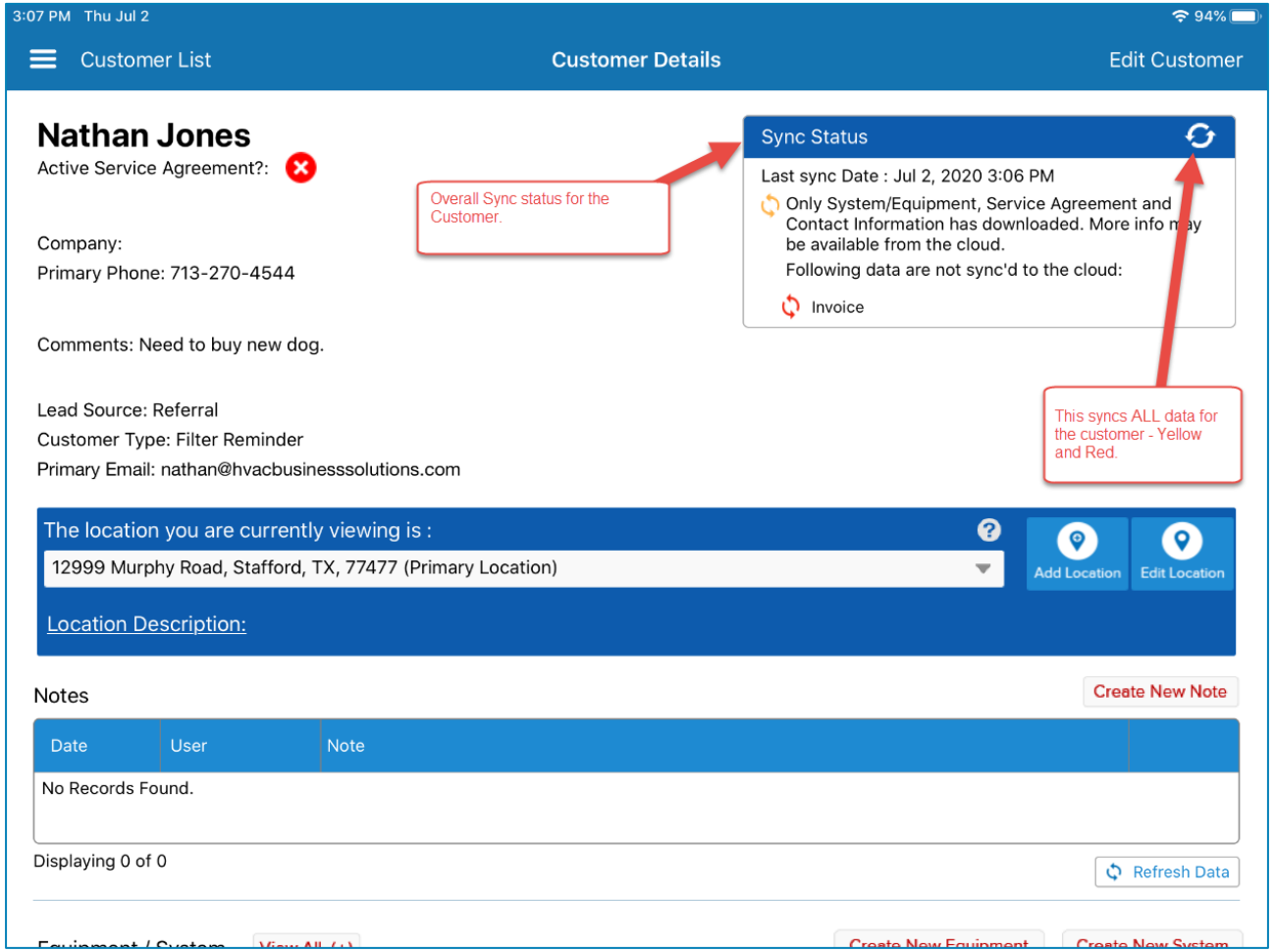
Arrows can be clicked to Sync that Specific Data Record

Click Icon to Download Details from Command Center.

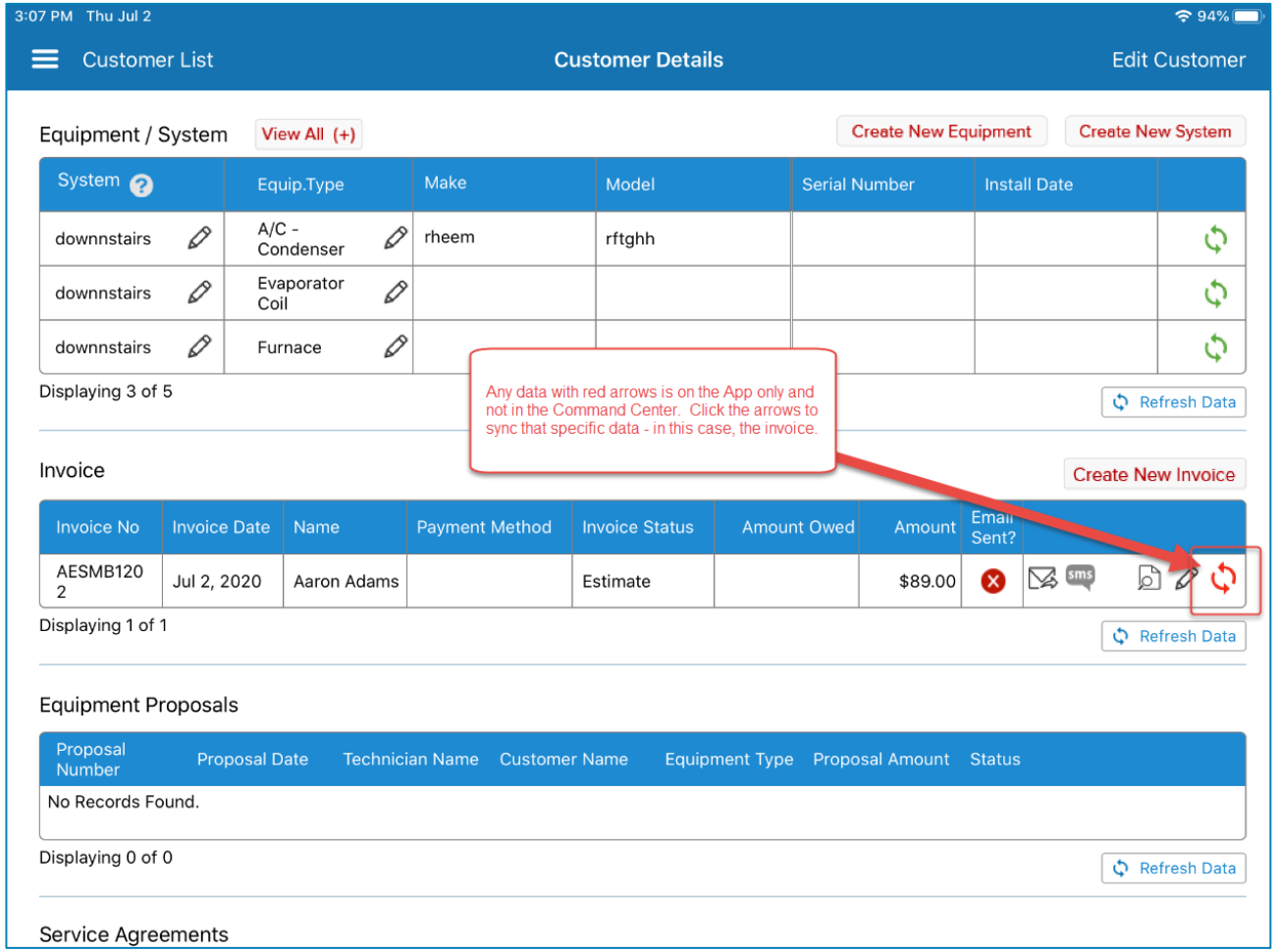
Once Download can Edit,

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

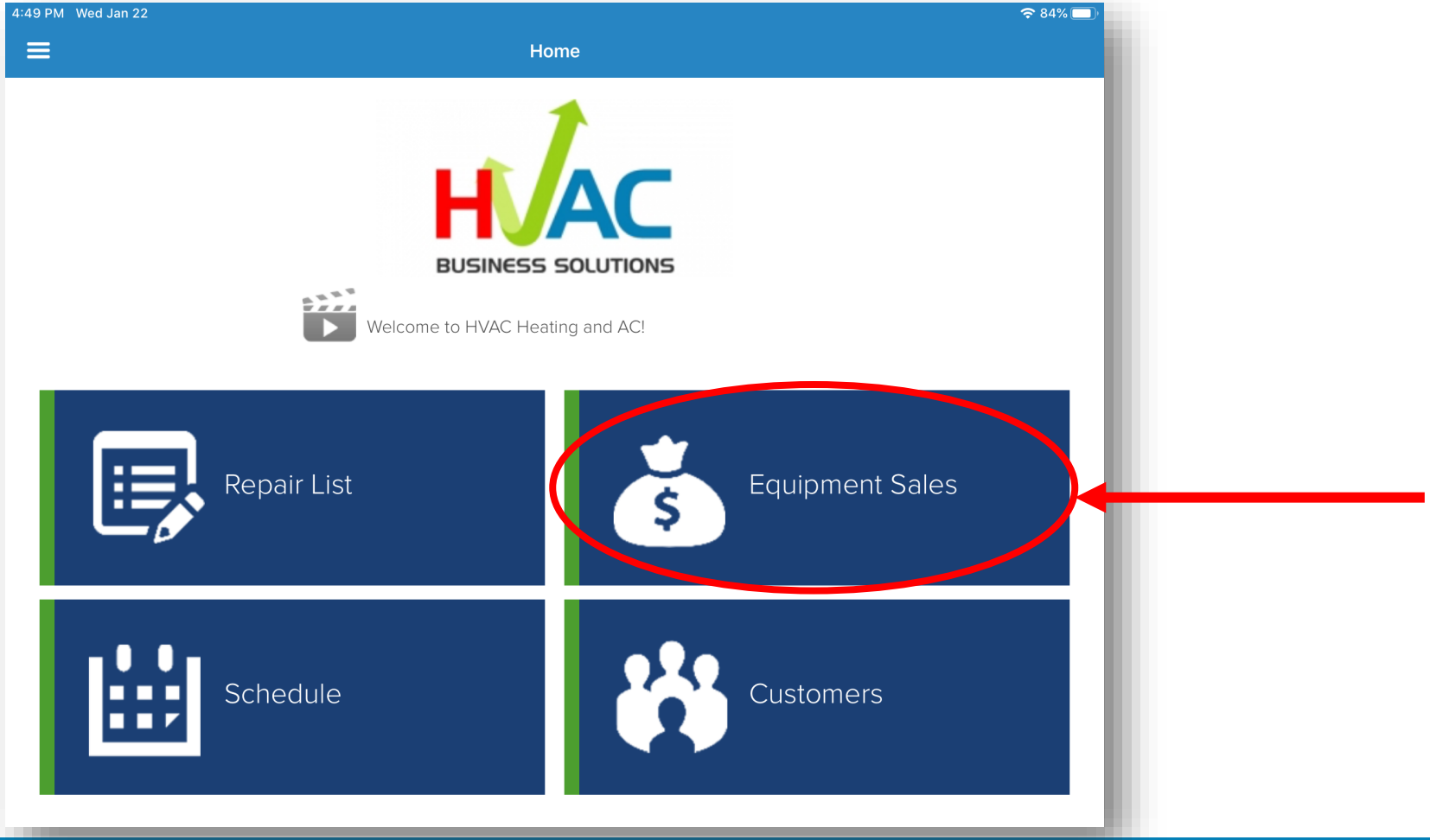
Customer Record – 5/6



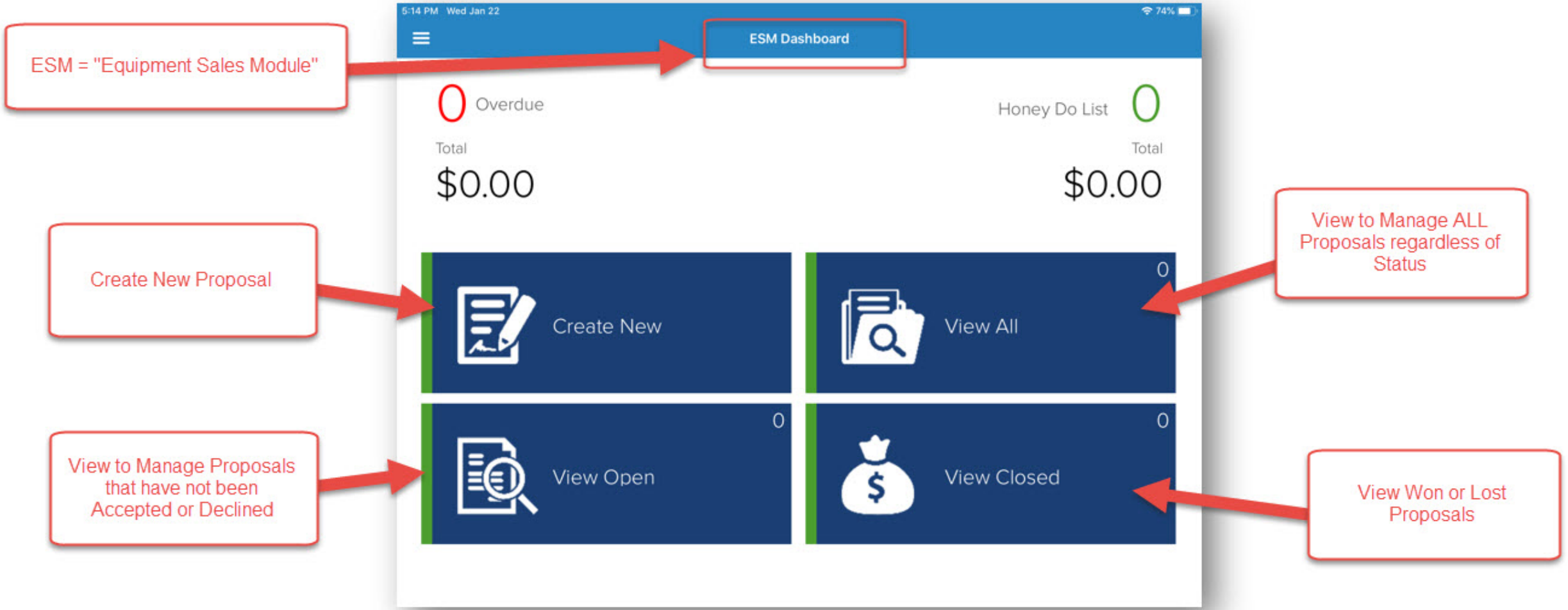
Customer Record – 6/6



Proposals – 1/5



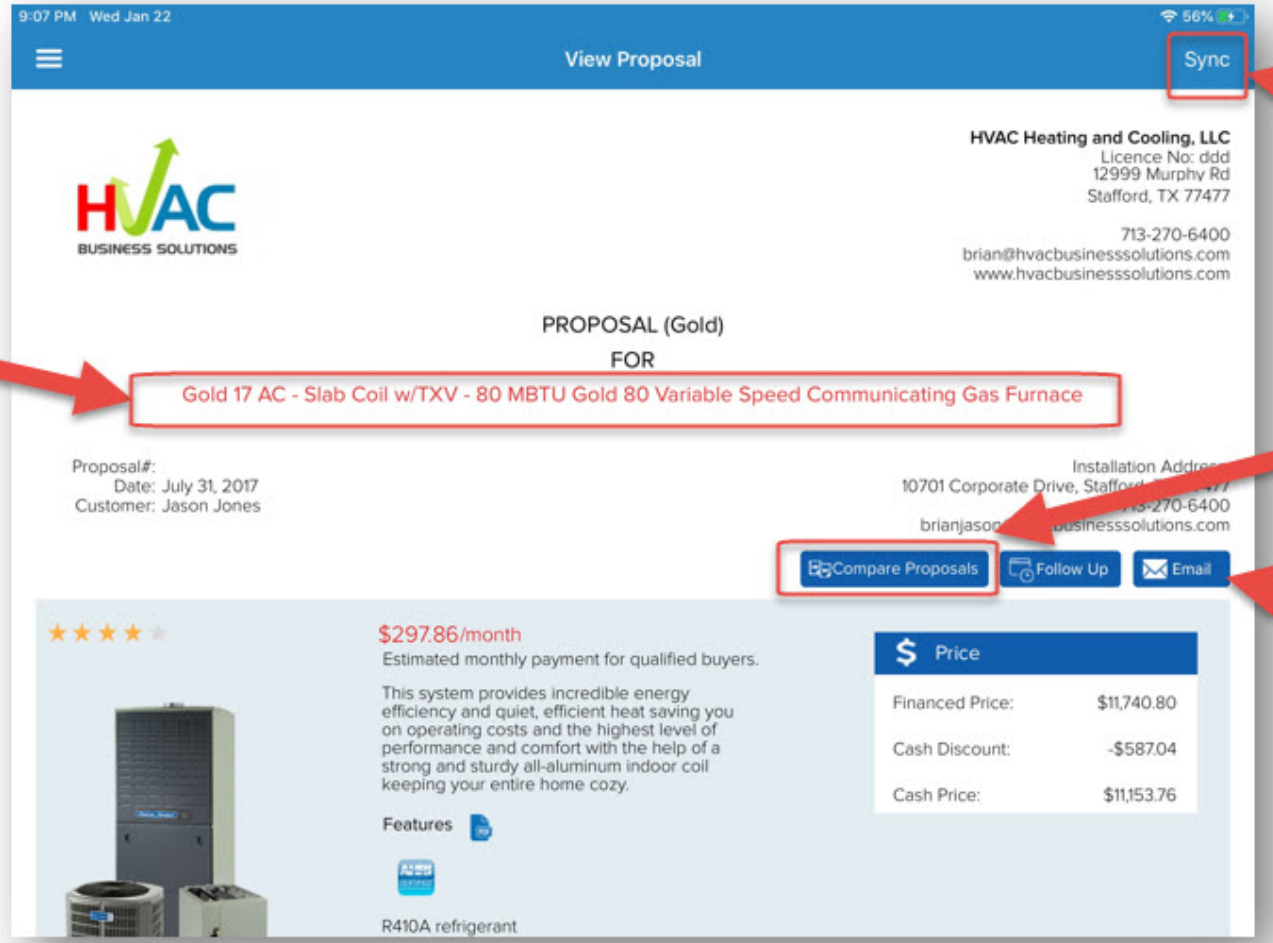
Proposals – 2/5



Proposals – 3/5

Customize Proposal Titles in Command Center

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

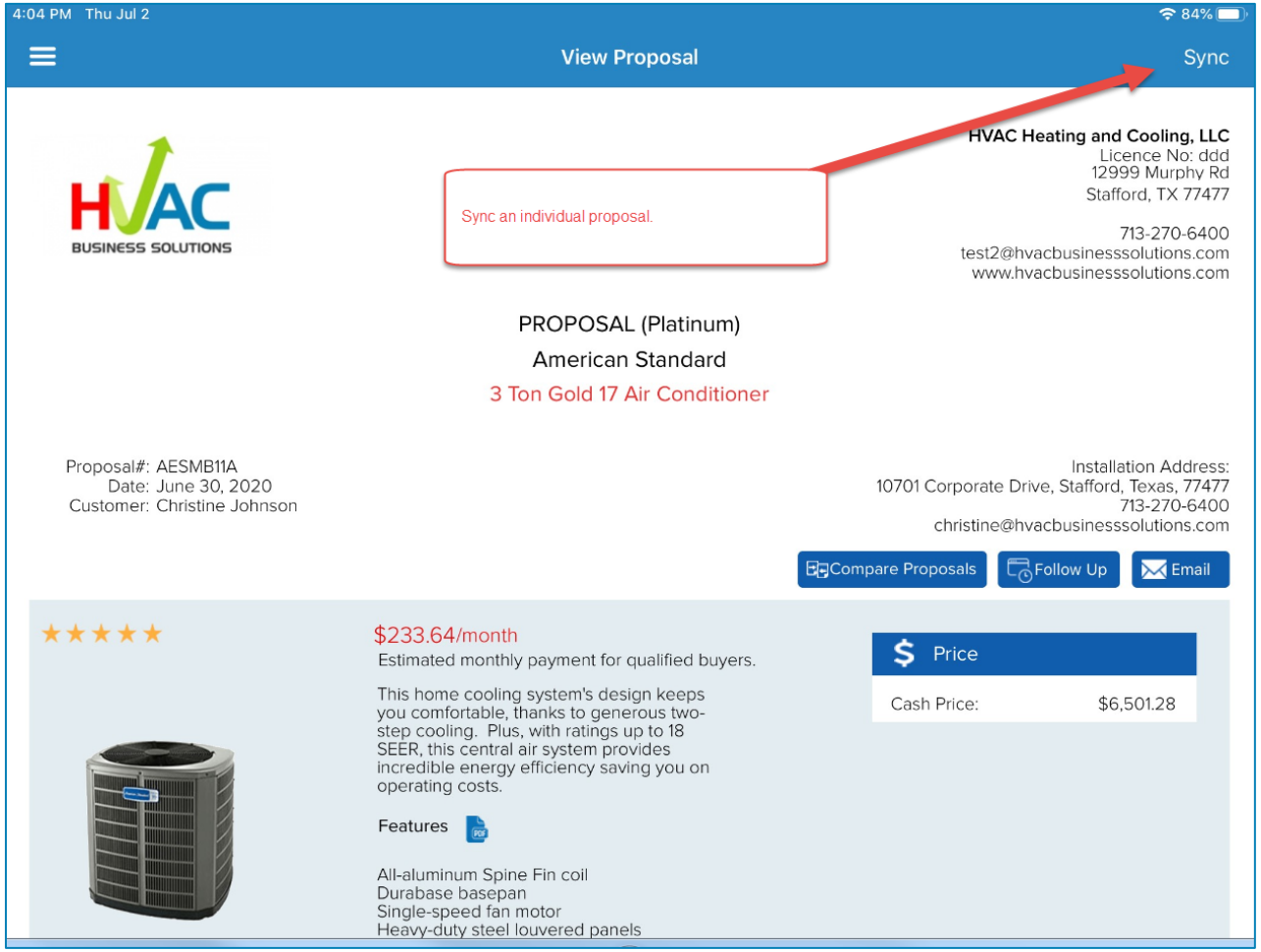
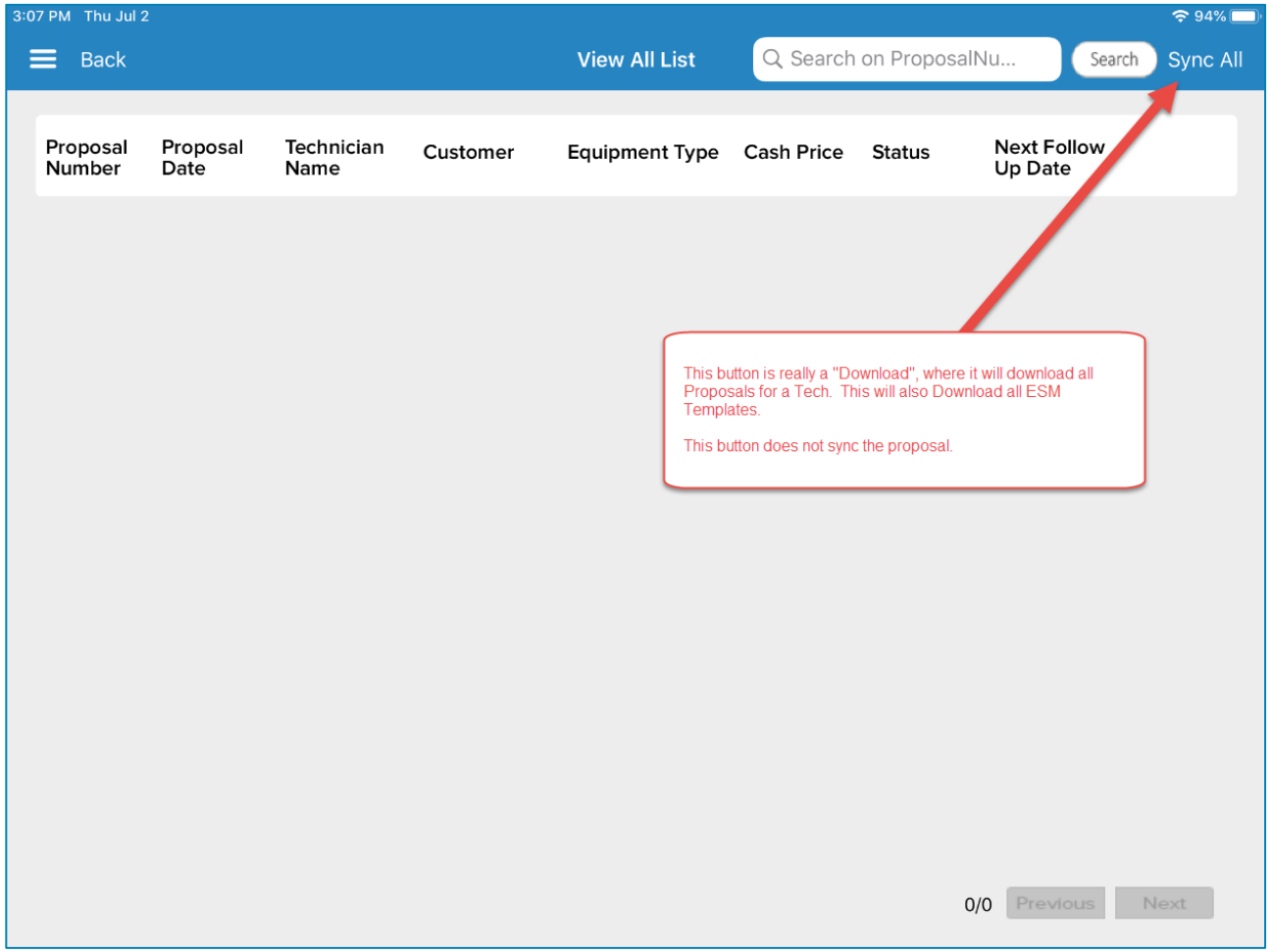


Sync to Command Center

Click to View Good/Better/Best Options

Emails this Option Only

Proposals – 4/5



Proposals – 5/5