HVAC Templates: For Every Stage of an HVAC Job

HVAC Templates: Estimates, Flat-Rate Pricing, Invoices, & More
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Over the last couple of years, our team of industry experts at ServiceTitan has been building a suite of free downloadable templates for HVAC businesses.

Here in our HVAC templates hub you can find each template with a corresponding article that explains what it includes, as well as how to download and use it in your business. And to make finding the templates you need easy, we've organized them by the following job stages:

- Before the job
- On the job
- After the job
- Running your business

Simply use the dropdown menu on the top left of this page to explore templates by job stage.

*Now, it's worth noting that HVAC businesses looking for these sorts of templates need to consider the one major downside of relying on PDF templates for managing all of these essential business processes***: *none of them are integrated to work with one another***.*

When you enter information into an estimate template, for example, you need to re-input much of that *same* information into each of the subsequent documents: work orders, purchase orders, inventory management systems, dispatching tools, invoices, accounting software, etc.

This process of repeatedly entering the same information into many different documents and tools has a number of significant implications:

- **Constant and repetitive manual data entry** on behalf of your field and office staff (and the **errors** that come along with that)
- **Wasted time** that could be spent on revenue generating activities: booking jobs with new clients, providing better customer service, marketing, etc.
- **Difficulty organizing** documents and keeping them all up to date
- **Difficulty accessing** documents remotely by staff throughout the company

These challenges, among others, are why many HVAC companies are choosing to invest in field service management software. Our HVAC software, ServiceTitan, integrates all of these different documents and business functions seamlessly, making them easy to create, update, and access by anyone in the company via any type of device. It provides tools for the entire job lifecycle from winning the work, to executing jobs, to getting paid.

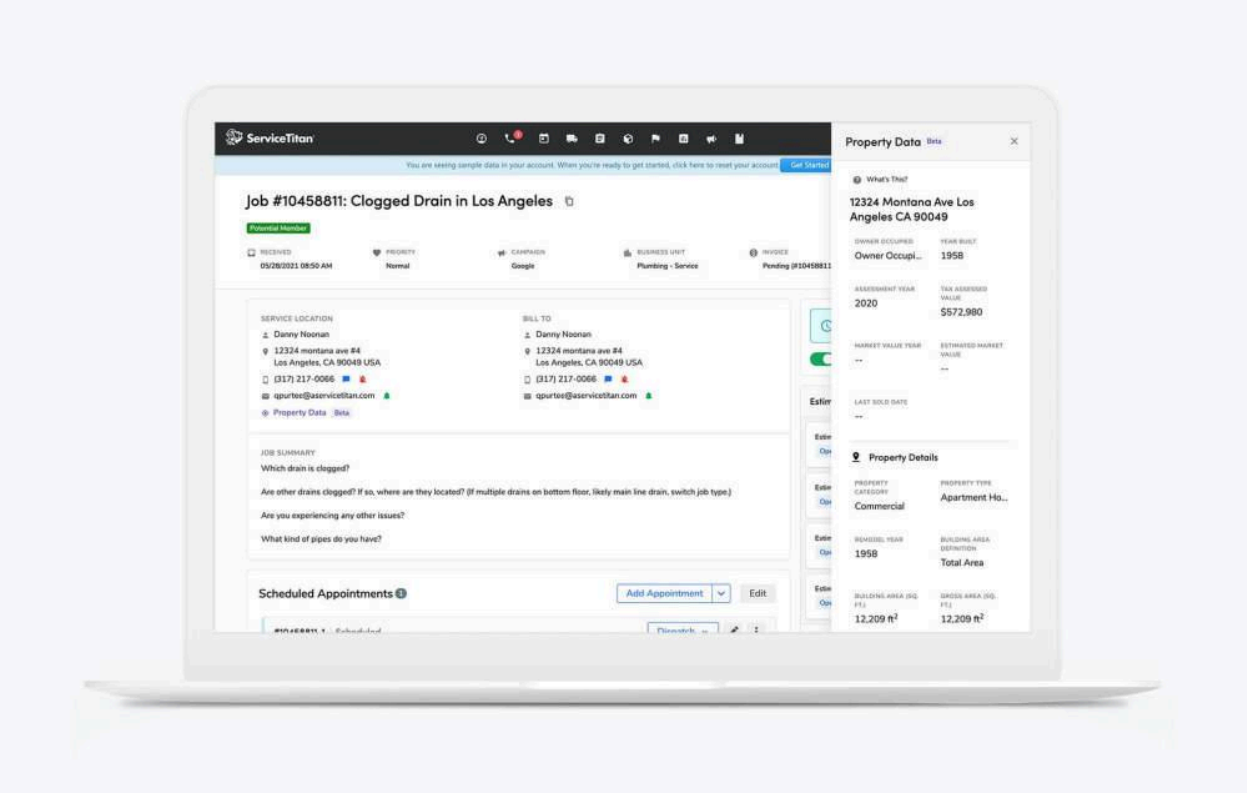
Below we're going to walk through exactly how our software integrates all of these business processes together into one system.

Want to see ServiceTitan in action? Schedule a call with us to learn more about how our software can help you streamline and grow your HVAC business.

How ServiceTitan Integrates and Streamlines the Entire HVAC Business Workflow (From Winning Work to Getting Paid)

When a call comes in or a job is booked through an online form (e.g. your HVAC website, a Google Local Services ad, etc.), the ServiceTitan workflow begins with creating a job.

1. Creating a Job: Capture All of the Information You Need In One Place



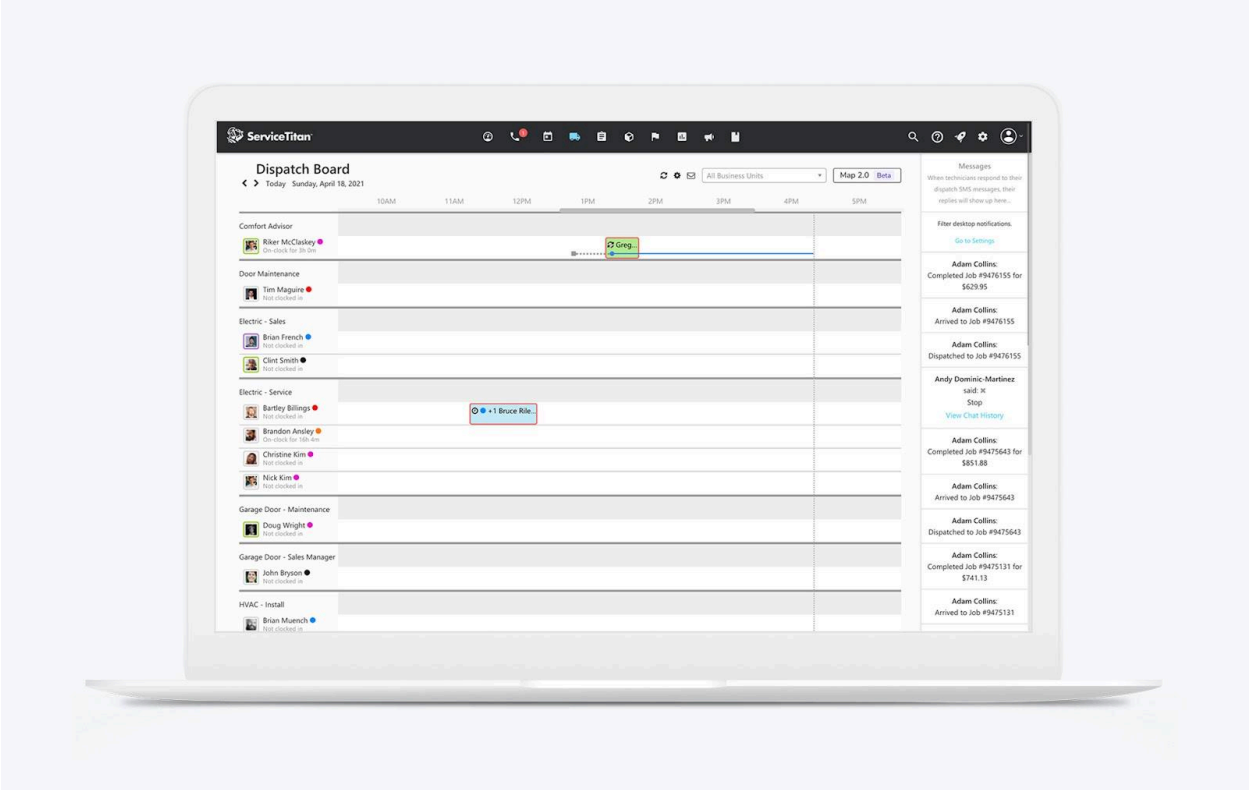
During a call booking, customer service representatives (CSRs) can collect all of the information that's necessary to begin engaging with a potential customer—name, address, phone number, email address, job summary, etc.

If the person calling in is an existing customer, the system will automatically pull up that customer's name, contact info, and past job history. Not only is there no need to re-enter their information, but CSRs have access to all of the context of that customer relationship right at their fingertips, allowing them to provide the highest quality customer experience.

From this page, CSRs can take notes on the problem the customer is experiencing or the work they need done, and this information is preserved and immediately accessible by anyone within the company. If a tech needs to get out to a location to assess a job as soon as possible, they have all of the information they need to get to the job site and begin reviewing the work to be done.

Then, throughout the course of fulfilling the job, this page acts as a homepage where all of the subsequent information and documents for the job can be found: billing information, scheduled appointments, estimates, invoices, and more.

2. Job Scheduling and Dispatching: Get the Right Techs, to the Right Jobs, at the Right Times



Once a job is created, ServiceTitan makes scheduling a technician to visit that job—whether for drafting an estimate or performing the work—a streamlined process.

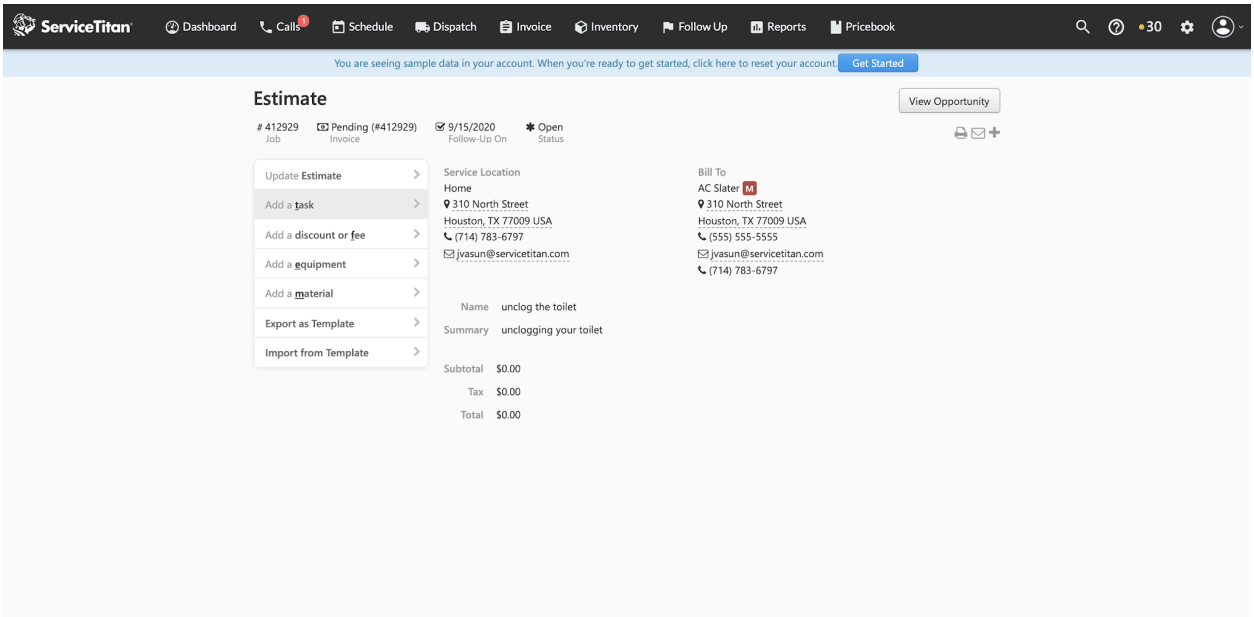
Our dispatching feature provides office staff with a clear view of each technician that's on the clock, where they're located, and which jobs they're scheduled to work on that day.

Right from the dispatch board, dispatchers can send and receive texts with technicians, keeping field and office staff on the same page while ensuring phone lines remain open for every customer opportunity.

And with our Map 2.0 and adjustable capacity planning features, dispatchers can more easily get the right techs to the right jobs, while maintaining control over how many man hours their techs can take on any given day.

Combined, our dispatching features alone can help HVAC businesses see significant improvements in operational efficiency and customer satisfaction. To view user testimonials and learn more about ServiceTitan dispatching—which includes additional features such as dispatch notifications, automated job confirmations, and more— click here.

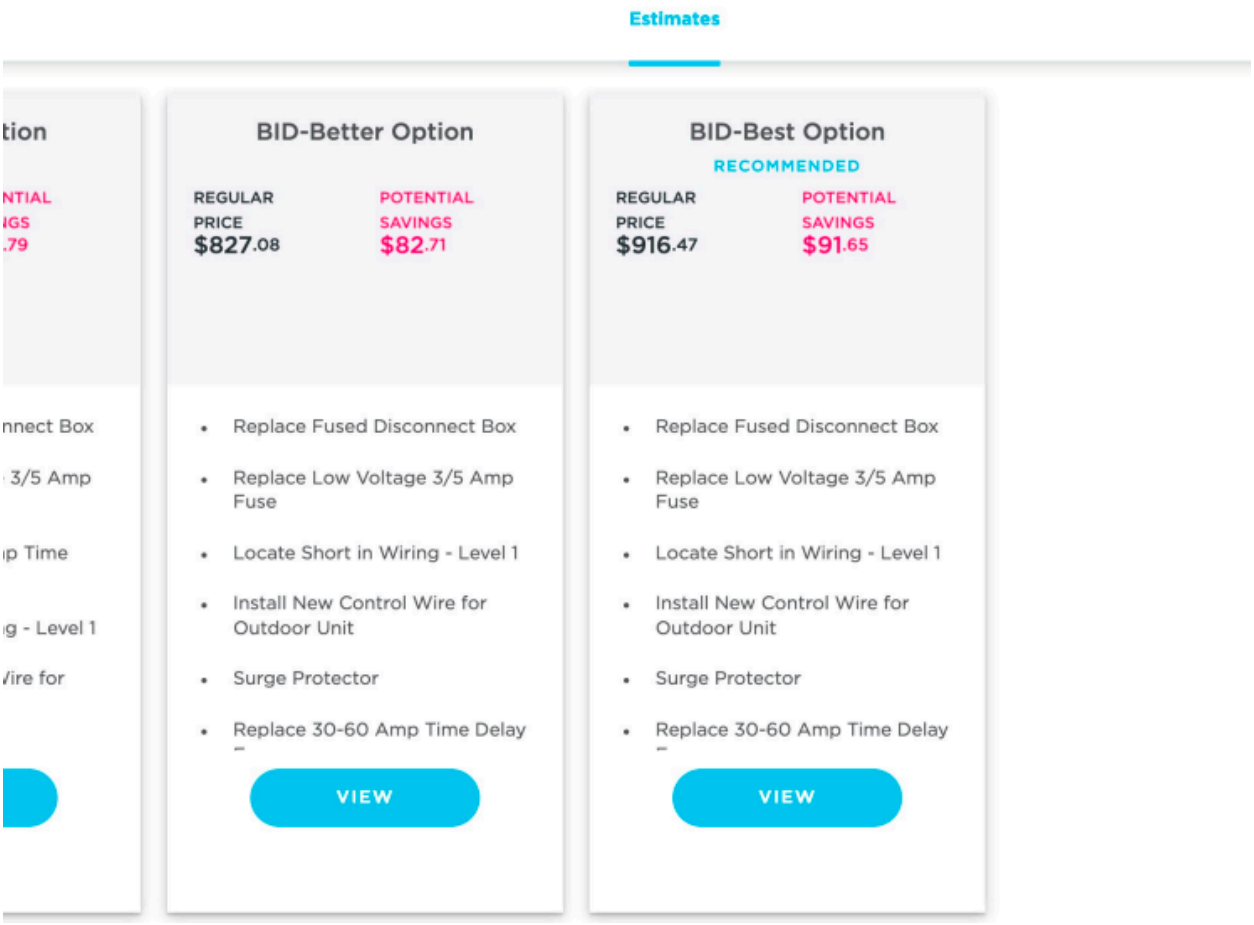
3. Building Estimates and Proposals (From the Field or Office)



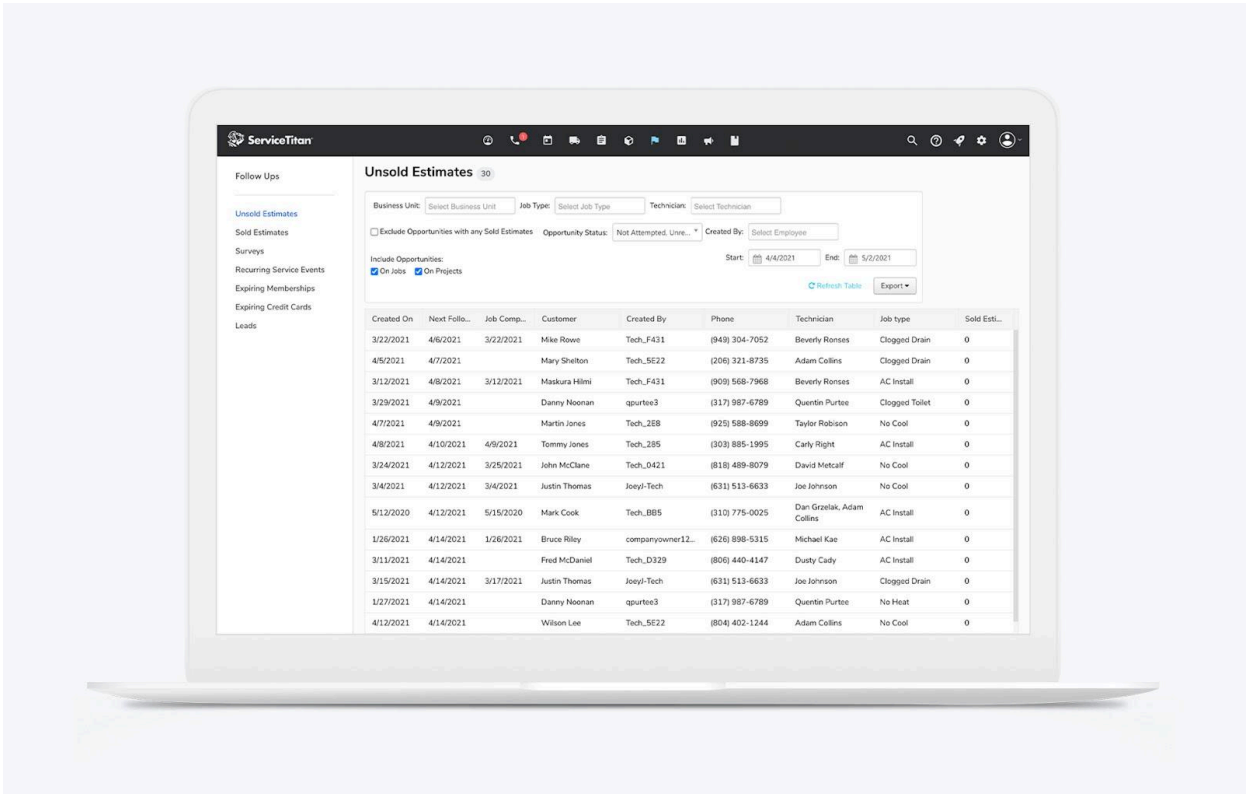
Depending on the job or business unit, estimates and proposals can be created from the field via a mobile device or from the office via a desktop. Users have the option to build these from scratch, or create templates for popular services that can be reused and customized accordingly, saving staff time and allowing you to deliver estimates more quickly and efficiently.

For each estimate, tasks, equipment, and materials can be added to build out the line items. And with our integrated pricebook features, all corresponding costs and totals are calculated automatically as you build your estimate (saving your team from error-prone, manual calculations and ensuring estimates reflect the most up to date pricing).

Estimates can be easily emailed to customers or presented in the field via mobile devices. And for shops that use Good Better Best proposals, these can easily be built and presented to customers as well:



In addition, we also have features that make it easier to track and follow up on open estimates:



Instead of letting potential customers slip through the cracks, CSRs can ensure they always follow up on unsold estimates. Our users find these tools to be invaluable for closing more jobs and increasing revenue.

And once an estimate is sold, work order documents are automatically populated based on the information from the estimate. No more copying the same information onto each new document as a job progresses.

4. Fulfilling the Work: Foster Accountability While Ensuring Techs Have What They Need

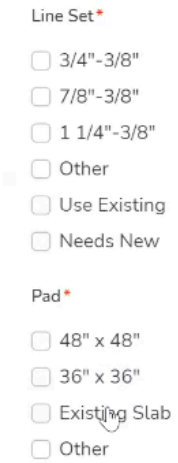
When it's time for technicians to visit a job site and complete the work, all of the information they need is at their fingertips and accessible via their mobile devices. This includes things such as:

- Call recordings of the initial incoming call from the customer
- All of the details of the job (estimate, work order, location, property data, etc.)
- Any pictures that were captured or sent during the estimating process

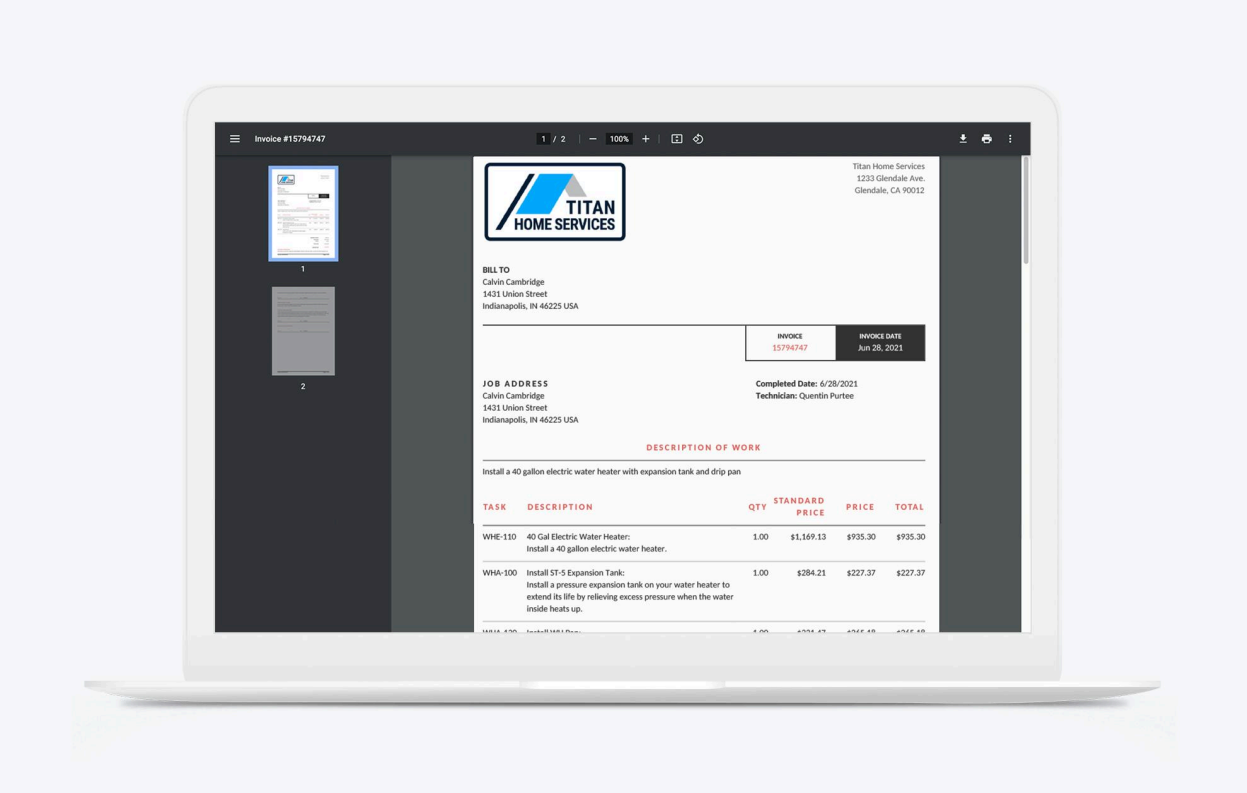
And, in addition to all relevant job information, ServiceTitan also has custom form features that help to foster accountability with technicians, ensure standard operating procedures are followed, and provide the best possible customer experience.

For example, businesses often use installation, service, or repair checklists. So, if a technician is preparing to install an air conditioning unit, repair a refrigeration unit, or service an HVAC system, they can follow a standardized series of steps (right from their mobile phone or tablet) on a predefined checklist to ensure they don't forget anything.

Forms can be customized to the level of detail businesses need—whether that includes checking specific pieces of equipment like heat pumps and air filters, or specifying the dimensions of the line set and pad for a given job.



5. Getting Paid: Invoices, Credit Card Payments, and More



When it's time to collect payment, ServiceTitan offers a number of different ways to invoice customers and get paid.

Similar to how job information is automatically populated on a work order based on what was entered into an estimate, invoices can be generated with a few clicks based on the work that's been done on a given job. Office staff can generate a PDF and email it directly to a customer right from within ServiceTitan. And customers can then pay that invoice online via our customer portal.

Alternatively, customers also have the option to pay via checks or credit cards through our mobile application. If a customer wants to pay directly upon completion of a job, technicians can accept their payments right from the field. This helps HVAC businesses get paid faster, keep customers happy, and maintain cash flow.

Finally, when payments are made, our QuickBooks and Intaact accounting integrations make it easy to reflect transactions accurately in your accounting system—allowing you to seamlessly complete the job lifecycle.

Throughout this article we've discussed some of ServiceTitan's core capabilities. But despite everything we've covered here, the features described above are still just scratching the surface of what our product has to offer HVAC businesses.

For example, we haven't gone into our reporting features—one of our most valued features by HVAC business owners. We also haven't discussed our integrated payroll and timesheets features, service agreement management features, or any of our add-on products.

The best way to see how all of these features work and integrate with one another is through a one on one demo with our team.

If you've read this far and are interested in learning more about whether an HVAC software solution might be right for your business, schedule a free demo and one of our product experts can walk you through exactly how these features work in practice.

Top 10 HVAC Templates to Download and Use In Your Business

For businesses that aren't quite ready for a fully integrated solution like ServiceTitan, here's the suite of templates we mentioned up top. Follow the links provided to view and download any of them that you'd like to use

Note: Many HVAC businesses are interested in website templates. We don't currently offer these, however you can shop for HVAC WordPress themes here. WordPress offers many different plugins for your business needs, such as contact forms and pop-ups for presenting special offers. For business cards, check out HVAC options on Vista Print where you can choose a template and adjust colors and fonts according to your brand style.

More Resources For HVAC Businesses

In addition to the suite of templates offered here, ServiceTitan has built out a number of other resources for HVAC companies to leverage, learn, and improve their businesses.

Here are some additional tools and resources to continue learning:

- HVAC Websites: 5 Tips to Rise Above the Competition in 2022 - Learn how to help your HVAC website break through the noise with a modern web design, best practices for SEO, and more.
- 10 Powerful Strategies For Generating HVAC Leads in 2022 - Learn how the most successful HVAC businesses are leveraging online reviews, social media, email marketing, and more.
- Free Online Tools for the Trades - Leverage tools such as our business valuation calculator, HVAC duct calculator, HVAC load calculator, and more.
- Field Service Management Contractor Playbook - Learn best practices from our team, as well as some of the top leaders in our industry on a wide range of business topics.

Our Entire Archive of HVAC Templates

So far, we've created templates for the following key business functions:

Before the Job

- **HVAC Flat-Rate Pricing Template:** Quickly Generate Precise, Accurate Proposals and Estimates
- **HVAC Estimate Template:** Close More Deals & Improve Efficiency
- **HVAC Proposal Template:** How to Present Options & Streamline Your Process
- **HVAC Bid Template:** Streamline Your Process from Bidding through to Invoicing
- **Commercial HVAC Bid Template:** Optimize Your Commercial HVAC Bidding Process with Our Free Download

On the Job

- **HVAC Work Order Template:** Get Organized and Impress Customers
- **HVAC Installation Checklists:** How to Drive Revenue Growth and Reduce Errors

After the Job

- **HVAC Invoice Template:** Optimize Your HVAC Invoicing y . Process

Running Your Business

- **HVAC Service Agreement Template:** Streamline Memberships
- **HVAC Postcards Templates:** Leverage Direct Mail and Track ROI on Your Campaigns