

Final Notes - Install Date, Customer Notes, Office Notes

Install Date

- Tap in the Install Date text box to display date spinner.
- Install Date when selected will appear on the Customer Proposal

Final Notes

Install Date 02/15/2018 X

November	12	2016
December	13	2016
January	14	2017
February	15	2018
March	16	2019
April	17	2020
May	18	2021

All required permits are included.

+

Customer Notes

- Set slider to green to select Final Notes for the Customer Proposal.
- Enter additional information in the text box at the end of each customer note.
- All selected notes will appear on the Customer Proposal

Cancel Final Notes Save

Settings

- Show Model Numbers
- Show Line Item Pricing

Customer Notes

- All required permits are included. This note is set to default ON
- All applicable sales and local taxes are included.
- Operational ductwork, venting, electrical wiring and drains are used as needed. If basement trunk needs to be replaced, we will quote separately
- All necessary materials and supplies to complete installation are included.
- Used (replaced) equipment is removed and recycled as appropriate.
- Used refrigerant is reclaimed and recycled in accordance with EPA Standards.

Customer Proposal

ZZ New Customer Proposal Done

Notes
Enter notes and payment info to personalize the customer proposal.
All required permits are included. This note is set to default ON
All applicable sales and local taxes are included.
Operational ductwork, venting, electrical wiring and drains are used as needed. If basement trunk needs to be replaced, we will quote separately.

Terms & Conditions

1. This proposal may be withdrawn if not accepted within 30 days.
2. Financing is subject to approval by financing company.
3. Contractor provides trained, qualified and licensed technicians.
4. All Labor & Warranty work is performed during the contractor's normal business hours.
5. Materials furnished by contractor include a one-year limited warranty unless otherwise noted. Limited warranty does not cover existing filters, coils, line-sets, electrical power lines and connections, drainage, refrigerant loss or contamination.
6. Contractor is not liable for any pre-existing conditions or any work performed by customer or third parties.

Office Notes

- Set slider to green to select Office Notes
- Enter additional information in the text box at the end of each office note.
- Selected notes will appear in the back office email when the job is completed.

[Cancel](#) **Final Notes** [Save](#)

Work area is cleaned upon completion.

System start-up is performed.

Proper operation is explained to you.

Thank you for the opportunity to discuss your comfort needs.

Thank you for your business.

Office Notes

Sales notes (next steps if order not won):

Unitary Installation notes:

New Note

Taxes & Fees

Show Taxes & Fees by Line Item

Happy Valley City %