



ServiceTitan®

# HVAC

## BIDDING PROPOSAL

### WHAT IS A BIDDING PROPOSAL IS USED FOR?

With a bid, you are expected to submit a document that illustrates the price for performing a specified amount of work at a specific price within a certain amount of time. A bid will be more detailed than an estimate or quote. Bids are more commonly used in large scale residential jobs, such as HOAs, duplexes, landlords with multiple locations, etc.



### WHAT IT LOOKS LIKE

A bidding proposal template will include:



#### RESPONSIBILITIES

Detailed description of the contractor's exact responsibilities for the term of the estimate and the location of work.



#### TIME

Time length of the proposal with provisions written on how the agreement can be terminated early.



#### PAYMENT

Payment arrangements, including payment terms and amounts.

### DOWNLOAD THE TEMPLATE

Fill out the form below and download this **free template** to start using for your business today.

## HVAC BIDDING PROPOSAL

**Job Site Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **Email:** \_\_\_\_\_

Good

Job Description

**Submitted by:** \_\_\_\_\_  
Print Signature Date

**Approved by:** \_\_\_\_\_  
Print Signature Date

Better

Job Description

**Submitted by:** \_\_\_\_\_  
Print Signature Date

**Approved by:** \_\_\_\_\_  
Print Signature Date

Best

Job Description

**Submitted by:** \_\_\_\_\_  
Print Signature Date

**Approved by:** \_\_\_\_\_  
Print Signature Date

**Note:** This proposal may be withdrawn if not accepted within thirty (30) days.

## BILLING/PAYMENT INFORMATION

**Business Name:****Business Phone:****Billing Contact Name:****AR Email:****Billing Address:****Billing Contact Phone #:****City:****Zip Code:****Credit Card Type:**☐

Visa

☐

MasterCard

☐

American Express

☐

Discover

**Credit Card #:****Expiration Date:** (mm/yyyy)**Zip Code:****Name as Appears on Credit Card:****Security Code:** 3 Numbers on Back of Card**Full Payment: \$****Monthly Payment: \$****Start Billing on :****Bid/Proposal Number:****Customer PO Number:****Invoice Number:****Net Terms:**☐

15

☐

30

☐

45

☐

60

☐

90

**Terms:** Unless otherwise indicated, full payment will be due upon the installation of equipment selected.

**Cardholder Signature:****Date:** (mm/yyyy)

The above prices, specifications and conditions are satisfactory. You are hereby authorized to do the above work as specified. It is agreed and understood by the parties that all equipment and parts which are sold pursuant hereto shall not become fixtures or part of the real estate where they are placed. Said parts and equipment shall at all times remain personal property and the title thereto shall remain with the seller until payment in full is received. Buyer hereby agrees that all parts and equipment may be repossessed in the event of non-payment.

## HVAC JOB COSTING

**Material:** The material costs include equipment, material (i.e., parts, pieces, copper, piping, tape, insulation, wiring, etc.), and accessories. Remember, material is taxable only if we do not carry a non taxable cert with the supply house.

**Labor:** Labor costs include installation labor plus any shop labor. The shop labor includes the labor to pull the material, any fabrication, and kitting. Labor is based upon Apprentice/ Installer. Miscellaneous expenses includes subcontracting, material delivery, removal, and disposal charges, and warranty costs. Warranty costs are the direct cost to purchase a manufacturer or third party extended warranty.

SELL PRICE	Good	Better	Best
Total Installation Costs	\$ _____	\$ _____	\$ _____
Enter Gross Margin Objective	_____ %	_____ %	_____ %
Sell Price	\$ _____	\$ _____	\$ _____
Minimum Sale Price	\$ _____	\$ _____	\$ _____
Commission %	_____ %	_____ %	_____ %
Commission	\$ _____	\$ _____	\$ _____
JOB ACTUAL	Good	Better	Best
Material	\$ _____	\$ _____	\$ _____
Actual	\$ _____	\$ _____	\$ _____
Labor	\$ _____	\$ _____	\$ _____
Actual	\$ _____	\$ _____	\$ _____
Misc Cost	\$ _____	\$ _____	\$ _____
Actual	\$ _____	\$ _____	\$ _____
FINAL PROFITABILITY	Good	Better	Best
Final Instal Cost	\$ _____	\$ _____	\$ _____
Sales Price	\$ _____	\$ _____	\$ _____
Gross Profit	- - - - -	- - - - -	- - - - -
Commission	- - - - -	- - - - -	- - - - -
Final Gross Profit	- - - - -	- - - - -	- - - - -
Final Gross Revenue	- - - - -	- - - - -	- - - - -