

How To Use The Proposal System

Pre-Appointment Proposal Set Up

We recommend pre-setting this for more of an impression of you doing more work before the appointment

- Press ctrl + S to open the hidden menu
- Input the Customer Info—Name, Address, Utility Co
- Click on “Customer Info” and switch to Costs and input product costs, and financing info you intent to present
- You can double-click on the house image to display satellite view

Optional Set Up Pre-Appointment or In Front of Customer

- Click the “Update Customer Information” button, input average monthly bill and either the kWh usage or cost

Send Customer Information

- Click the “Download Report” button at the bottom of the proposal to download full screenshot for you to email customer
(Updating soon to automatically email customer the info)

Build Urgency

- Click the Orange Banner at the top of the proposal to display a popup indicating a Free Installation that is expiring today. This popup also displays after 60 seconds of inactivity in case you're conversing with the customer, the popup will give them a little reminder.
(Use this to your advantage)

(Longer Version Below)

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The Energy Savings Calculator web application is designed to help homeowners estimate potential energy savings from various energy-efficient home improvements. Here's how to use it:

1. **Basic Usage:**
 - There's a hidden settings button (⚙️) in the bottom right corner that you can access by clicking or using Shift+S or Alt+S
 - The settings panel has two main sections: "Customer Info" and "Costs"
2. **Customer Information Section:**
 - Enter your name
 - Input your address
 - Select your utility company (options include APS and SRP)
 - **Choose which energy-saving products you want to present:**
 - AC Chip
 - Oil Fouling Flush
 - Tune Filter
 - Heat Radiant Barrier
 - Smart Thermostat
 - Aeroseal Duct Sealing
3. **Costs Section:**
 - Set yearly rate increase percentage (default 6%)
 - Adjust prices for each product if needed
 - **Set financing terms:**
 - APR (default 4.99%)
 - Term length (default 15 years)
 - Add any additional savings percentage
4. **Results Display: The calculator will show you:**
 - A 15-year ROI (Return on Investment)
 - Monthly payment estimates
 - Available tax credits (up to 30% with a \$1,200 cap)
 - A sliding timeline that lets you see costs and savings for specific years
 - Estimated increase in home value
5. **Additional Features:**
 - Case studies section showing real-world examples
 - Option to download a report of your calculations
6. **Tax Credit Information:**
 - The calculator automatically factors in the 25C tax credit
 - Shows calculations both with and without tax credits applied