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## HVAC Operations Manual

At last, a complete and fully editable HVAC Operations Manual at an affordable price. This is the most widely asked for item in our history and it is finally here. Best of all, we are offering it at a low introductory price.

This manual includes training materials, federal compliance guides, policies, procedures, forms, templates, and pricing information specific to a residential and light commercial HVAC company. It is totally specific to HVAC and we wrote every bit of it.



## Professionally Formatted and 100% User Editable

The entire system is printed in color on heavy bright white paper. Each manual is presented in a binder so it is easy to edit pages and replace them as needed. Best of all, these professionally formatted documents are included on a CD in MS Word format and they follow all standard MS Word formatting conventions. The owner can open, modify, edit, and print any of these forms and documents as needed.

## Training Videos Included

We have setup a play list on our YouTube account. This play list contains various training videos that cover selected content in the HVAC operations manual. Please go to [www.youtube.com/jamesleichter](http://www.youtube.com/jamesleichter)

## Some Impressive Statistics

You have to be asking yourself question like: How many pages are there? How many documents are included? How many forms are there? The following stats are approximate and subject to change but this should give you a pretty good picture of what is included.

Pages: 2650

Words: Almost 1 Million

Forms and Templates: 159

Files: 204 files in 107 folders

Size of Files: 78 MB

## HVAC Franchise Materials at a Fraction of the Price

This is a systematic HVAC management system that is much like what you would receive if you became a member of a first class HVAC franchise. The difference is that a franchise might charge you \$25,000 plus

a percentage of your annual sales. We offer our system at a fraction of the cost and there are NO ongoing fees or royalties.

The investment is just \$2,500.00. That's less than one dollar per page.

👉 *Please Note: Refunds will not be accepted and all sales are subject to a Terms of Usage Agreement that must be signed prior to shipping the product.*

## **Personal Consulting and Training**

The HVAC operations manual includes two (2) hours of personal consulting with me (via telephone). These private consulting hours can be used to explain and implement the system. You will have one year to use these consulting hours. Additional consulting hours can be acquired for just \$125.00 per hour (half my regular rate). From time to time, we will offer group training and meetings at no charge. If there is enough demand, we will host an annual meeting of HVAC Operations Manual owners. Details and fees will be announced.

## **Free Updates**

Updates to the system (edits, new forms, and procedures) and available for download for one year at no cost. We will also be posting videos to YouTube on a regular basis.

## **HVAC Operations Manual Sections and Forms**

The following is a list of the sections and the various forms included in this HVAC operations manual. These sections are all included and are not sold separately.

### **Section 00: Implementation Guide**

This is a complete manual on how to implement the system into your specific company. There is a list of priorities and lots of advice on how to get started.

#### **Included Forms**

Comprehensive Implementation Checklist  
How to Establish Priorities Checklist

### **Section 1: Legal Affairs**

Covers legal matters pertaining to corporate and general business issues such as which Federal laws apply to you and how to comply with them. Protecting your company with the appropriate copyrights and trademarks are important and is well covered here. The manual explains business types and how to select a business or corporate structure. Copyrights and trademarks are covered and the related forms are included.

#### **Included Forms**

Agreement Applicability Chart  
Carbon Monoxide Policy  
Confidentiality Agreement  
Confidentiality Statement

Copyright Manual (from USPTO)  
 Copyright Application (from USPTO)  
 Department of Labor Offices by State  
 Disclosure and Release Form  
 Drug Testing Consent Form  
 Employment Agreement  
 Employment Disclosure and Release Form  
 Employment Policy Manual Acknowledgement  
 Equipment Inspection Policy  
 Fair Labor Standards Act Poster  
 Furnace Inspection Agreement  
 Independent Contractor Agreement  
 Independent Contractor Agreement Checklist  
 Invoice and Sales Proposal Terms and Conditions  
 Legal Agreements and Forms  
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 No Refrigerant Venting Policy  
 Non-Disclosure, Non-Solicitation, & Non-Compete Agreement  
 Notice of Right to Cancel Transaction  
 Sample Articles of Corporation  
 Sample Corporate By-Laws  
 Sample Meeting of Stock Holders  
 Trademark Manual (from USPTO)  
 Worker Retraining and Adjustment Act Poster

## Section 2: Office, Building, and IT Management

This manual includes general office policies, rules and procedures regarding building management, as well as plenty of good information on computer security, maintenance, and networking issues.

### Included Forms

ADA Compliance Guide  
 Basic Windows Networking Test  
 Building Cleaning Checklist  
 Building Maintenance Checklist  
 Cleaning Supply List  
 Computer and Networking Checklist  
 Computer Data Protection Checklist  
 Office Task Sheet  
 Paper Shred Poster  
 Recycle Poster  
 Recycling Checklist and Poster  
 Schedule of Training and Meetings  
 Telephone Scripts

QUESTIONS		POSSIBLE SOLUTIONS	
Item, continued In the accessible stall, are there grab bars behind and on the side wall nearest to the toilet?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Add grab bars.
Is the toilet seat 17 to 19 inches high?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Add raised seat.
<b>Lavatories (ADAAG 4.19.4.2)</b>			
Does one lavatory have a 30-inch-wide-by-48-inch-deep clear space in front?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Rearrange furnishings. Replace lavatory. Remove or alter lavatory to provide space underneath. Make sure hot pipes are covered.
A maximum of 19 inches of the required depth may be under the lavatory.	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Move a partition or wall. Adjust or replace lavatory.
Is the lavatory rim no higher than 34 inches?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Adjust or replace lavatory.
Is there at least 29 inches from the floor to the bottom of the lavatory apron (excluding pipes)?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Adjust or replace lavatory.
Can the faucet be operated with one closed fist?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Replace with pad die handle. Lower dispenser. Replace with or provide additional accessible dispensers.
Are soap and other dispensers and hand dryers within reach ranges (see page 7) and usable with one closed fist?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Lower or tilt down the mirror. Add a larger mirror anywhere in the room.
Is the mirror mounted with the bottom edge of the reflecting surface 40 inches high or lower?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	
<b>Priority 4 Additional Access</b>			
Note that this priority is for items not required for basic access in the first three priorities. When amenities such as drinking fountains and public telephones are provided, they should also be accessible to people with disabilities.			
<b>Drinking Fountains (ADAAG 4.15)</b>			
Is there at least one fountain with clear floor space of at least 30 by 48 inches in front?	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	Clear access routes by rearranging or removing furnishings.

Checklist for Building Facilities version 2.1 © revised August 1995, Adaptive Environments Center, Inc. for the National Institute on Disability and Rehabilitation Research. For technical assistance, call 1-800-949-ADA (voice) or TDD.

Figure 1: ADA Checklist

**EMPLOYEE RIGHTS**  
 UNDER THE FAIR LABOR STANDARDS ACT  
 THE UNITED STATES DEPARTMENT OF LABOR WAGE AND HOUR DIVISION

**FEDERAL MINIMUM WAGE**  
**\$7.25 PER HOUR**  
 BEGINNING JULY 24, 2009

**OVERTIME PAY** At least 1½ times your regular rate of pay for all hours worked over 40 in a workweek.

**CHILD LABOR** An employee must be at least 16 years old to work in most non-farm jobs and at least 18 to work in non-farm jobs designated hazardous by the Secretary of Labor.

Under 14 and 15 years old may work outside school hours in various non-manufacturing, non-mining, non-hazardous jobs under the following conditions:

No more than

- 2 hours on a school day or 18 hours in a school week;
- 8 hours on a non-school day or 40 hours in a non-school week.

Also, work may not begin before 7 a.m. or end after 7 p.m., except from June 1 through Labor Day, when evening hours are extended to 9 p.m. Different rules apply to agricultural employment.

**TIP CREDIT** Employees of " tipped employees " must pay a cash wage of at least \$2.13 per hour if they claim a tip credit against their minimum wage obligation. If an employer tip credit with the employer's cash wage of at least \$2.13 per hour do not adjust the minimum hourly wage, the employer must make up the difference. Certain other conditions must also be met.

**ENFORCEMENT** The Department of Labor may recover back wages either administratively or through court action, for the employees that have been underpaid in violation of the law. Violations may result in civil or criminal action.

Employers may be assessed civil money penalties of up to \$1,100 for each willful or repeated violation of the minimum wage or overtime pay provisions of the law, and up to \$1,100 for each employee who has been subject to a violation of the Act's child labor provisions. In addition, a civil money penalty of up to \$50,000 may be assessed for each child labor violation that causes the death or serious injury of any minor employee, and such assessments may be doubled, up to \$100,000, when the violation was determined to be willful or repeated. The law also prohibits discriminating against or discharging workers who file a complaint or participate in any proceeding under the Act.

**ADDITIONAL INFORMATION**

- Certain occupations and establishments are exempt from the minimum wage and/or overtime pay provisions.
- Special provisions apply to workers in American Samoa and the Commonwealth of the Northern Mariana Islands.
- Some states provide greater employee protections; employers must comply with both.
- Some states require employers to display this poster when employees can readily see it.
- Employees under 20 years of age may be paid \$4.25 per hour during their first 90 consecutive calendar days of employment with an employer.
- Certain full-time students, student teachers, apprentices, and workers with disabilities may be paid less than the minimum wage under special certificates issued by the Department of Labor.

For additional information:  
**1-866-4-USWAGE**  
 (1-866-487-6243) TTY: 1-877-955-5627  
**WWW.WAGEHOUR.DOL.GOV**

U.S. Department of Labor | Wage and Hour Division

Figure 2: FLSA Poster

## Section 3: Bookkeeping and Accounting

This manual explains the basics of bookkeeping and how to process accounts payable and accounts receivable. Year end procedures and tax issues are covered. There is also a forty five page “basics of accounting” manual called *Simple Accounting Principles for the HVAC Contractor*. We wrote this specifically for the HVAC industry.

### Included Forms

Basic Accounting 1 Test  
Basic Accounting 2 Test  
Bookkeeping Security and Theft Prevention Checklist  
Department and Division List (profit centers)  
Depreciation Schedules  
Financial Ratios and Analysis (extensive)  
HVAC Chart of Accounts  
HVAC Division and Department List  
Job Costing and Estimate Worksheet (detailed)  
Paperless Folder File Structure (folders needed for electronic document management)  
Purchase Order  
Simple Accounting Principles for the HVAC Contractor (a complete manual)  
QuickBooks Import File for Chart of Accounts (iif)

## Section 4: Human Resource Management (HR)

This is one of the core sections and deals with employee related matters. It is a very extensive section and contains an employment policy manual, organization chart, job descriptions, federal laws, employment posters, and more. There are numerous policies, procedures, and forms related to hiring, employee reviews, and firing.

### Included Forms

Application for Employment  
Basic Reasoning Test  
Certificates of Appreciation  
Confidentiality Non-Solicitation Agreement  
Co-Worker Annual Review Checklist  
Declaration of Tardiness  
DOL Contact List by State  
Drug Testing Consent Form  
Employee or Independent Contractor Checklist  
Employment Flyer  
Employment Goals and Objectives Checklist  
Employment Policy Manual  
Equal Opportunity Employment Poster  
Example Employment Classified Ad



Figure 3: OSHA Poster

Family and Medical Leave Act Poster  
 Firing Procedures Checklist  
 General Logic and Reasoning Skills Test  
 Hiring Procedures Checklist  
 HVAC Business Organization Chart  
 HVAC Job Descriptions  
 Illegal Reasons for Firing Employees List  
 Job Interview Question Checklist  
 Minimum Wage Poster  
 OSHA Poster  
 Personality Characteristics Evaluation  
 Polygraph Protection Poster  
 Pre-Employment Questionnaire  
 Reasoning through Deduction Test  
 Refrigerant Venting Policy  
 Service Technician Post-Employment Technical Skills Test  
 Service Technician Pre-Employment Test  
 Spelling Test  
 Technician Compensation Placement Chart  
 Time off Request  
 Uniformed, Services, Employment and Reemployment Poster  
 Workers Compensation Poster  
 Workers with Disabilities Act Poster  
 Written Reprimand  
 Written Reprimand and Notification

The image shows a 'Production Activity Log' form. It has a header section with fields for 'Date', 'Technician', 'Job', 'Hours', 'Status', 'Notes', and 'Comments'. Below the header is a large grid with multiple rows and columns for recording activity. At the bottom, there are sections for 'Total Hours' and 'Total Status'.

Figure 4: Production/Dispatch Log

## Section 5: Compensation and Payroll

Performance Based Compensation is covered as well as flat rate pay, book time pay, bonuses, companywide spiffs, and profit sharing. This section also contains extensive information regarding employment laws and how to comply with them. This section does not contain information on how to create a paycheck.

### Included Forms

Co-Worker Bonus Guide (Spiffs)  
 Installation Technician Compensation Plan  
 Installation Technician Compensation Plan  
 Payroll Time Journal (Time Sheet) - Installation Technician  
 Payroll Time Journal (Time Sheet) - Service Technician  
 Sales Person Compensation Plan  
 Sales Person Expectation Checklist  
 Sales Person Gross Profit Margin Goal Sheet  
 Service Technician Compensation Plan  
 Service Technician Flat Rate Compensation Agreement  
 Service Technician Time and Materials Compensation Agreement

The image shows an 'Aptora Satisfaction Survey' form. It includes the Aptora logo and contact information: 8877 Bourgade Street, Lenexa, Kansas 66219-1403, Phone: 913-492-9930, Fax: 913-492-9923, Web Site: www.aptora.com, Email: helpdesk@aptora.com. The letter is addressed to the client and expresses appreciation for their business. It asks for feedback on the technician's attitude, professionalism, and overall satisfaction. The survey table has columns for 'Poor', 'Fair', 'Good', 'Very Good', and 'Excellent'.

	Poor	Fair	Good	Very Good	Excellent
How would you rate the attitude of the person who took your phone call?	1	2	3	4	5
How would you rate the attitude and professionalism of our technician?	1	2	3	4	5
How would you rate the overall neatness and cleanliness of our technician?	1	2	3	4	5
How would you rate your overall satisfaction with our technician?	1	2	3	4	5
How would you rate the explanation given to you by our technician?	1	2	3	4	5
How would you rate your overall satisfaction with our company?	1	2	3	4	5
Would you recommend our company to your family or friends?					Yes No

Figure 5: Satisfaction Survey

## Section 6: Scheduling and Field Management

This section covers scheduling sales calls, maintenance, service calls, and installations. There is a complete set of scripts for your service and installation technicians including exactly how to present themselves to the client (customer). You also receive a complete set of HVAC flat rate pricing books for your service department. Three different labor rates are included. We have included our Customer Satisfaction Survey System so that you will be able to survey your clients.

### Included Forms

- Breakeven Calculation Worksheet (MS Word®)
- Breakeven Calculation Worksheet (MS Excel®)
- Complete Flat Rate Pricing Book in MS Word - \$100hr (about 250 pages)
- Complete Flat Rate Pricing Book in MS Word - \$125hr (about 250 pages)
- Complete Flat Rate Pricing Book in MS Word - \$150hr (about 250 pages)
- Complete Flat Rate Pricing Book in PDF - \$100hr (about 250 pages)
- Complete Flat Rate Pricing Book in PDF - \$125hr (about 250 pages)
- Complete Flat Rate Pricing Book in PDF - \$150hr (about 250 pages)
- Customer Proposal Request (Sales Lead)
- Customer Proposal Request (Sales Lead) Tabulation Form
- Customer Satisfaction Card
- Customer Satisfaction Tabulation
- Energy Savings Worksheet
- Flat Rate Repair Task Worksheet
- Flat Rate Service Call Presentation Checklist
- Installation Job Quality Checklist
- Office Procedures Checklist
- Parts Mark-Up Table
- Production Activity Log
- Replacement Decision Worksheet
- Service Department Hourly Labor Rate Card
- Service Flat Rate Pricing Guide
- Service Invoice (flat rate pricing – several variations)
- Service Invoice (time and materials – several variations)
- Service Labor Pricing Worksheet
- Service Technician Invoice Presentation Checklist
- Telephone Scripts (handling incoming calls)
- Time and Materials Service Call Presentation Checklist
- Vehicle Inspection Worksheet

**Example HVAC Company**

VERY IMPORTANT: CUSTOMER SATISFACTION SURVEY RESULTS FOR ALL DEPARTMENTS											
Name	Question One	Question Two	Question Three	Question Four	Question Five	Question Six	Question Seven	Response	Avg. Rating	Avg. score	Change
OUR GOALS	4.0	4.0	4.0	4.0	4.0	4.0	98%		40%	4.0	
ACTUAL SCORE											
THE DIFFERENCE											
For period ending _____ Completed by _____											

Figure 6: Client Satisfaction Survey Results

## Section 7: Inventory Management

This section contains general inventory policy, bar code information, purchase orders, and other management information. There is a inventory list for your service trucks, installation vehicles, and main warehouse (master inventory item list).

The master inventory list can be imported into your favorite software program such as QuickBooks® Enterprise, Total Office Manager®, Microsoft Dynamics GP®, Sage ERP MAS 200 SQL®, and others.

### Included Files

- Initial Inventory Procedures Checklist
- Installation Truck Inventory List
- Inventory Stocking Procedures Sheet
- Maintaining the Inventory System Checklist
- Master Inventory List
- Purchase Order
- Service Truck Inventory List

### Section 8: Marketing and Sales

Marketing, advertising, and salesmanship are covered in this section. We cover branding, logos, slogans, and elevator pitches. There is a list of 112 specific marketing and advertising ideas that you can implement quickly. We have also built a comprehensive sales manual complete with scripts, pricing models, sales proposals, and a lot more.

### Included Forms

- 112 Marketing Ideas Checklist
- Client Comfort Survey
- Energy Savings Worksheet
- Exclusive Replacement Warranty
- Features vs. Benefits Sheet
- Google AdWords® Manual (reprint of public info)
- How to Make the Sale Checklist
- HVAC Systems Sales Proposal
- Marking Collateral Checklist
- Risk-Free Comfort System Warranty
- Sales Assessment and Skills Sheet
- Sales Presentation Checklist
- Sample Sales Proposal Cover Letters

### Section 9: Health, Safety, and Security

This important manual includes posters, federal compliance information, information about staying healthy in the workplace, personal safety and security, and specific safety policies.

### Included Forms

- Accident Report
- American with Disabilities Act Checklist
- Material Safety Data Sheets MSDS – Extensive (1242 pages)
- Material Safety Data Sheets MSDS – Simplified (specific to inventory list)
- OSHA Compliance Checklist
- Safety Checklist
- Safety Equipment List
- Safety Rules and Guidelines Sheet

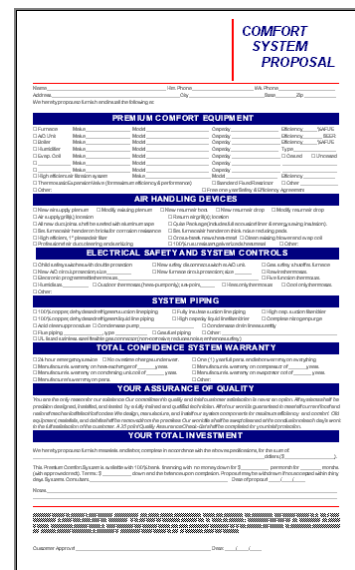


Figure 7: HVAC Sales Proposal

Sample Emergency Instructions  
 Warning Signals of Workers Compensation List  
 Workers Compensation Checklist

## Section 10: Credit and Collections

This section contains policies on granting credit, terms & conditions, legal information related to complying with federal law, and form letters.

### Included Forms

Collection Procedure Checklist  
 Hiring a Collection Agency or Law Firm Checklist  
 Mechanics Lien Waiver  
 Sample Collection Letters (Total of 6)  
 Sample Credit Terms

## Section 11: Service Agreements

This is an entire service agreement system from start to finish. It includes policies, specific procedures, sales and marketing, forms, and pricing tables.

### Included Forms

Air Conditioning Tune-Up Checklist  
 Complete System Tune-Up Checklist (Several Variations)  
 Furnace Tune-Up Checklist  
 Heat Pump Tune-Up Checklist  
 Sample Renewal Letter  
 Sample Service Agreement Policy  
 Sample Service Agreement Pricing  
 Sample Service Agreement Sales Letter  
 Selling Service Agreement Checklist  
 Service Agreement Program Set-Up Checklist  
 Service Agreement Template (Several Variations)  
 Technician Tune-Up Procedures  
 Waiver of Legal Liability for Unsafe Working Conditions

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The following is the current table of contents. While this information is subject to change, the TOC is included to give you an idea of how extensive this manual actually is. Imagine how long it would take to create this HVAC Operations Manual yourself.

Figure 8: Service Agreement



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