

How Do I Build a "Good, Better, Best" Proposal for a Homeowner?



How Do I Capture a Digital Signature to Close a Sale in the Field?



How Do I Offer Palmetto Financing to My Customers?



How Do I Create a Quote with Palmetto Financing?



How Do I Send a Quote to Multiple Email Addresses?



How Do I Create a Custom Checkout Page for My Homeowners?



How Do I Customize the Upgrades with Photos and Videos?



How Do I Add Accessories to a Quote?



What System Types Are Available in SetSale?



How Do I Build a Quote for Multi-Zone Ductless Systems?



How Do I Perform a Load Calculation Within a Quote?



Can I Manually Override the AI's Suggested Equipment for a Specific Job?



How Do I Adjust Pricing on a Specific Quote?



How Do I Add Custom Equipment that Isn't in the SetSale Database?



How Do I Change Equipment Brands in SetSale?



How Do I View the AHRI Certificate for a Specific Equipment Matchup?



How Do I Upload My Company Logo and Colors for Customer-Facing PDFs?



How Do I Set My Company's Default Labor Rates and Trip Charges?



How Do I Update the Tax Rate for a Specific Service Area or County?



How Do I Use the Team Quote Actively?



How Do I Export My Sales Data for a Weekly Performance Review?	^
How Do I Archive or Delete an Old Proposal?	^
How Do I Archive Equipment Instead of Deleting it?	^
How Do I Sync My Finalized SetSale Quote Back to ServiceTitan?	^
How Do I Sync My Finalized SetSale Quote Back to Housecall Pro?	^
How Do ServiceTitan Permissions Work?	^
Why Is My ServiceTitan Sync Failing?	^
Why Aren't Customers Showing Up in My ServiceTitan Search?	^
How Do I Troubleshoot the Palmetto Integration?	^
How Do I Add Thermostats to My Quotes?	^
Where Can I Add Thermostats?	^
Why Is Equipment Missing From My Proposal Tiers?	^
What Should I Do if I'm in a Basement with No Internet?	^

Have Additional Questions? Use your chatbot in the SetSale app to ask a question (bottom-right corner of your SetSale screen), or visit help.setsale.ai for more information.