

OMEGA AIR – INTERNAL USE ONLY

Rebate & Financing – Dispatcher Quick Guide

1. When to Mention Rebates

- Heat pump installation or full system replacement
- High-efficiency equipment discussion
- Permit-based installation projects
- Do NOT mention for repairs or small service calls

2. Approved Rebate Script

“Depending on eligibility, there may be California rebates and a federal tax credit available for high-efficiency heat pump systems.”

Never guarantee rebate amounts. Always state that eligibility depends on income, equipment rating, and program approval.

3. When to Offer Financing

- All installs over \$8,000
- Full system replacements
- When customer hesitates on upfront cost

Approved Script: “We offer monthly payment options through financing. Instead of paying the full amount upfront, many homeowners choose manageable monthly payments.”

4. What NOT to Say

- “You will definitely get \$8,000.”
- “Everyone gets approved.”
- “It won’t affect your credit at all.”

5. When to Escalate to Manager

- Customer asks exact rebate qualification details
- Customer requests monthly payment calculation
- Customer wants financing pre-approval
- Income qualification questions