

# SAMPLE HVAC SALES FORM

## General

What is the address of the job?	
When is the install scheduled for?	
<p>Are there compromises to the home?</p> <p><i>If the home is compromised in any way that may cause any health or safety hazards, please check all that may apply so we can ensure all proper PPE is sent with the teams.</i></p> <p><i>If asbestos must be disturbed, we must assist the customer with a remediation company. If it is a crowded work space, please ask the customer to clear 3-6 feet circumference around work area(s).</i></p>	<p>Mold</p> <p>Infestation (Pests)</p> <p>Water</p> <p>Trash</p> <p>Animal Waste</p> <p>Asbestos</p> <p>Crowded Work Space</p> <p>Other (Please specify in notes)</p>
<p>What are we installing? (check all that apply)</p>	<p>Gas Furnace and AC</p> <p>Furnace Only</p> <p>AC and Coil Only</p> <p>Air Handler / Heat Pump</p> <p>Dual Fuel</p> <p>Mini-Split</p> <p>Water Heater</p> <p>Generator</p>
<p>What is the height of the indoor equipment? (inches)</p> <p><i>Please measure the combined height from the floor to the first take-off of the supply plenum. This should include any existing furnace base, the furnace, the evaporator coil, and any metal work leading to the first supply run coming off of the plenum.</i></p>	
<p>What is the width of the indoor equipment? (inches)</p>	
<p>How many thermostat wires are available?</p> <p><i>Please select the amount of thermostat wires we have to work with so we can accurately order the appropriate setup.</i></p>	
Which thermostat did we promise the customer?	
If selling an S40, is a room sensor required?	
Which source of fuel does the unit use for heating?	
What is the furnace orientation and appropriate position?	
What is the appropriate condensate pump, if needed?	
Do we need an SDS drill?	
Is this an attic install?	

What are the dimensions of the attic opening? (inches)	
Does the technician need to pick up space heaters when they leave?	
Does the technician need to pick up portable ACs when they leave?	
How many portable ACs are required?	
Upload a picture of the portable AC unit	(upload file)
If it is an attic or downflow install, will the technicians need plywood?	

## Gas Furnace Questions

Upload a picture of the furnace data plate	(upload file)
<i>From a distance, take overall pictures or videos of the indoor system/setup</i>	(upload file)
<i>Furnace, coil, return, plenum, surrounding space</i>	
Is this an 80% to 90% furnace conversion?	
Are there flue liner considerations?	
<i>Only applies to 80% furnace applications and/or if we upgrade to a 90% furnace and the hot water heater still uses a chimney.</i>	
What size flue wye do we need?	
Which filter rack are we installing?	
Do we need a furnace base?	
What size return drop is needed?	
What is the current flue material?	
Is the PVC cellular core?	
<i>If so, it will need to be replaced.</i>	
What is the approximate length of the current venting for the furnace?	
<i>If PVC, include intake and exhaust.</i>	

## Air Handler Questions

What size heat kit does the air handler need?	
Which filter rack are we installing?	
Do we need a furnace base?	

What size return drop is needed?	
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## AC / Heat Pump Questions

Upload a picture of the outdoor unit (condenser) data plate for order accuracy	(upload file)
Please select the appropriate length of lineset required if replacement is needed.  <i>Always overshoot if uncertain!</i>	
Upload a picture or video of where the lineset needs run  <i>Add multiple if necessary</i>	(upload file)

## Humidifier Questions

Are we installing a humidifier?	
What kind of humidifier are we installing?	
What material is the waterline for the humidifier?	
Upload a photo of the current humidifier shutoff (if present)	(upload file)

## Electrical Questions

Upload a picture of the breaker panel.  <i>The AC breaker must be clearly visible.</i>	(upload file)
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## Additional Questions

Are there additional accessories needed?	No additional accessories IWAVE-R UV Light System A (14") Supply Plenum B (17.5") Supply Plenum C (21") Supply Plenum D (24.5") Supply Plenum
Is plumbing or electrical needed?	Plumbing Electrical

<i>For example, need plumbing to install humidifier valve or electrical to run new wire, upgrade existing breaker, etc.</i>	
Any additional notes for the job?	(upload file)
Upload drawing for permitting	(upload files)

## Financing

What is the method of payment?	
If a loan was offered, upload a loan offer details screenshot	(upload files)
Upload a timeline screenshot	(upload files)
Upload the application approval picture	(upload files)
What is the application ID?	
Upload a picture of ID, front and back	(upload files)