

Call Date and Info *(this relates to when the tech or estimator gets to the customer's house/office)*

Date _____ Time _____ Tech Name _____ Tech# _____ Start Time _____

Customer Type _____

Visit Reason _____ End Time _____ Return Visit Required Y N When _____

Special Equipment Needed Y N *If yes, what is needed?* _____

Notes _____

Customer Info

Name _____ Account# _____ Email _____

Address _____ City _____ State _____ Zip _____

Home Phone _____ Mobile Phone _____ Work Phone _____

Best call times: 1) _____ 2) _____ Ok to text? Y N Ok to email? Y N In City Limits? Y N

Spouse Name _____ Phone _____

Picture of house from street view _____

Notes _____

Basic Filter & Equipment Info**Inside Unit**

Type _____ Brand _____ Model# _____

Serial# _____ Unit Location _____

Filter 1 Size _____ Thickness _____ MERV Rating _____ Quantity _____ Brand _____

Replacement Schedule _____ Effective Date _____

Filter 2 Size _____ Thickness _____ MERV Rating _____ Quantity _____ Brand _____

Replacement Schedule _____ Effective Date _____

- *Should be able to add as many Filter sizes as needed by selecting 'add Filter' button*

Service Item 1 _____ Brand _____ Model _____

Replacement Item _____ Replacement Schedule _____ Effective Date _____

Service Item 2 _____ Brand _____ Model _____

Replacement Item _____ Replacement Schedule _____ Effective Date _____

- *Should be able to add as many serviceable items as needed by selecting 'add Service Item' button*

Pictures needed: 1) Inside Unit _____ 2) Nameplate _____ 3) Coil & Plenum _____ 4) Filter Cabinet _____ 5) Other Items _____

6) Access Area _____ 7) Other _____

Button for "Additional Inside Equipment Info" button will open the following fields:

Size (BTU Input) _____ (BTU Output) _____ Efficiency % _____ Stages _____

Height of Furnace/AH _____	Width of Furnace/AH _____	Depth of Furnace/AH _____
Orientation _____	Horizontal _____	Lineset Length _____
Lineset Size - Suction ____ High ____	Lineset Accessible Y N Other (note)	Reusable Y N
Return drop on _____	Return Drop Size ____ x ____	Return Box Y N
Add Return Box Y N	Return Box Size ____ x ____ x ____	Return Trunk Size ____ x ____
Add Return(s) Y N	What size ____ x ____	Quantity _____
Coil Type _____	Coil Size ____ H x ____ W x ____ D	Refrigerant Type _____
Supply Plenum Size ____ H x ____ W x ____ D		
Is Ductwork sized properly Y N	Trunk Line 1 Size ____ x ____	Trunk Line 2 Size ____ x ____
Is ductwork sealed Y N Some	Is ductwork dirty Y N	
Drain Type _____	Drain Size ____ D x ____ L	Condensate Pump Y N Add
Drain Pan Y N Add	Size ____ L x ____ W	Overflow switch Y N Add
Distance to water line _____'		
Flue type _____	Size ____ D x ____ L	Vents through _____
Concentric Vent Y N Add	Replace current with _____	Length needed _____
Intake flue needed Y N Optional		
Current Electric Feed _____	Existing Breaker(s) _____ (multiselect)	Additional space in box N Y ____
Distance from box _____'	Wire size _____	Shut-off installed Y N Add
Electric Outlet on/nearby N Y _____'		

Accessories Present

__ Filter Cabinet	__ Hi-efficiency Filter	__ Electrostatic Filter	__ Humidifier _____
__ UV Light (for coil)	__ UV Air Purifier (whole house)	__ Carbon Filter	__ Dehumidifier _____
__ HEPA Filter	__ Ionizer Unit	__ Other _____	

Notes _____

Outside Unit

Type _____	Brand _____	Model# _____
Serial# _____	Unit Location _____	
Pictures: 1) Outside Unit ____ 2) Nameplate ____ 3) Lineset ____ 4) Pad ____ 5) Disconnect ____ 6) Other ____		

- Button for "Additional Inside Equipment Info" button will open the following fields:

Condenser/HP Height _____ Condenser/HP Length _____ Condenser/HP Width _____
 Pad Size _____ x _____ Pad Condition _____ Replace Pad Y N
 Whip Length _____ Disconnect Type _____ Disconnect Size _____
 Wall Mounted Y N Add
 Current Electric Feed _____ Existing Breaker(s) _____ (multiselect) Additional space in box N Y _____
 Distance from box _____' Wire size _____ Electric Outlet on/nearby N Y _____'
 Notes _____

Agreement Info

Agrmt Type _____ Purchase Date _____ Service Frequency _____
 Start Date _____ Expire Date _____ Price _____ Billing Schedule _____ Amount _____
 Repair Discount% _____ Equipment Discount% _____ Priority Response Y N
 Filter Provided by _____ Change filter at time of service Y N
 Filter 1 (this can pull from info under "Basic Filter & Equipment Info")
 Brand _____ Filter Size _____ Width x _____ Height x _____ Thickness _____ MERV Rating _____
 Quantity _____ Filter Model# _____
 Notes _____

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Notifications (that need to be automated)

1. To the Dealer

- Customer Info
- Agreement Info
- Scheduled Visits and Items
- Billing Info
- Renewal Info
- Prompt for Next Potential Sale

2. To the Customer/Homeowner/Business Owner

- Service Now Due alert
- What is to be done (filter or UV lamp changed, etc)
- Able to schedule a service time online or through text
- Special Offers
- Reminders about filter changes, etc.
- Send receipt when payment made via credit card, online or ACH (bank account)

Dealers need to be able to run reports on all information that is collected to set up service days, marketing activities and follow-up calls.