

# Industrack HVAC Change-Out Checklist

Date: \_\_\_\_\_ Customer Name: \_\_\_\_\_

Address: \_\_\_\_\_ Contact Number: \_\_\_\_\_

Email Address: \_\_\_\_\_ Project Information: \_\_\_\_\_

## Inspection:

- Inspect existing HVAC system
- Check ductwork for leaks or damage
- Evaluate electrical connections
- Assess thermostat functionality

## Permits and Permissions:

- Obtain necessary permits
- Verify customer has given permission for change out

## Safety Precautions:

- Shut off power to the HVAC system
- Disconnect electrical connections
- Properly dispose of refrigerant
- Remove old system components carefully

## Component Removal:

- Remove old thermostat
- Remove indoor unit (furnace/air handler)
- Remove outdoor unit (condenser/heat pump)
- Remove and dispose of old filters

## Installation Checklist:

- Clean installation area
- Ensure proper ventilation
- Prepare new unit's foundation

## Component Installation:

- Install new thermostat
- Install indoor unit (furnace/air handler)
- Install outdoor unit (condenser/heat pump)
- Connect refrigerant lines
- Connect electrical wiring

## Ductwork:

- Inspect and repair ductwork if necessary
- Connect new system to existing ductwork
- Ensure all connections are secure
- Post-Installation Checklist:

## System Testing:

- Check refrigerant levels
- Test electrical connections
- Ensure proper airflow
- Test thermostat operation
- Check for leaks in ductwork

## Customer Walkthrough:

- Explain new system operation to the customer
- Provide maintenance tips
- Answer any customer questions

## Final Documentation:

- Record model and serial numbers of the new system
- Record refrigerant charge amount
- Record any additional work performed
- Obtain customer signature for completed work

## Maintenance Schedule:

- Recommend maintenance check-up in 6 months
- Schedule annual maintenance

## Competitor Analysis

- Company Name:
- Pricing for Similar Change-Out
- Warranty Offered
- Special Features or Promotions
- Customer Reviews and Ratings

## Technician Name

- Date of Change-Out:
- HVAC System Model Number:
- HVAC System Serial Number:
- Old System Removal (Yes/No):
- New System Installation (Yes/No):