

[Street address, city, state ZIP]  
[Phone] · [Email] · [Website]  
License # [your HVAC license number] · EPA 608 certified

Work order # [0001]  
Date [MM/DD/YYYY]  
Quote # [if there was one]  
Scheduled [Date — and the start time]  
Assigned to [Technician]  
Permit # [if the job needs one]

[Customer name]  
[Phone] · [Email]  
[Billing address, if different from the job site]

[Street address, city, state ZIP] · [where the equipment is]

[Existing system — type, size, age, refrigerant, what failed]

[New equipment — make, model, size, rating, per the quote]

[Access, parking, gate code, pets]

| DESCRIPTION                                                                                                                                                      | QTY                             | RATE             | AMOUNT |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|------------------|--------|
| Diagnostic / service call<br>[What was found]                                                                                                                    |                                 |                  |        |
| Labor — [repair / replacement / install / tune-up]<br>[Exactly what, in the same words as the quote — flat rate or hours × rate]                                 |                                 |                  |        |
| [Condenser / furnace / heat pump / air handler — or the coil, thermostat, motor or part]<br>[Make, model, size, efficiency rating — write the serial on the day] |                                 |                  |        |
| Refrigerant [R-410A / R-32 / R-454B]<br>[Pounds × rate — recovery included]                                                                                      |                                 |                  |        |
| [Pad, whip, disconnect, line set and materials]<br>[What to bring]                                                                                               |                                 |                  |        |
| Permit and inspection<br>[Permit number · inspection date]                                                                                                       |                                 |                  |        |
|                                                                                                                                                                  |                                 |                  |        |
|                                                                                                                                                                  |                                 |                  |        |
|                                                                                                                                                                  |                                 | Subtotal         |        |
|                                                                                                                                                                  | Sales tax / GST / VAT ([rate]%) |                  |        |
|                                                                                                                                                                  |                                 | Total            |        |
|                                                                                                                                                                  |                                 | Deposit received |        |

### Balance to collect on completion

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**WORK REQUESTED**

[The job in the customer's words, and what's on the quote]

**NOT INCLUDED**

[Ductwork, line set, electrical, thermostat — quote it separately if you find it]

**MATERIALS TO LOAD**

[Everything on the truck before you leave the shop — including the refrigerant and the recovery cylinder]

**READINGS AT START-UP**

[Outdoor temp · return / supply temp · static pressure · suction / head pressure · superheat / subcool · amps]

**COMPLETION**

[Completed by] — [date] · [time on site] · [old equipment recovered and recycled] · [data plate photos] · [inspection booked for]

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