



ServiceTitan®

HVAC

Proposal Template

WHAT A PROPOSAL TEMPLATE IS USED FOR

A proposal template outlines responsibilities between the client and your business. The document should also outline payment arrangements.

WHAT IT LOOKS LIKE

A proposal template will include:



RESPONSIBILITIES

Detailed description of the contractor's exact responsibilities for the term of the estimate and the location of work.



TIME

Time length of the proposal with provisions written on how the agreement can be terminated early.



PAYMENT

Payment arrangements, including payment terms And amounts.



DOWNLOAD THE TEMPLATE

Fill out the form below and download this **free template** to start using for your business today.

HVAC PROPOSAL TEMPLATE

Your Company Name:

Address:

Phone Number: Email:

CUSTOMER INFORMATION

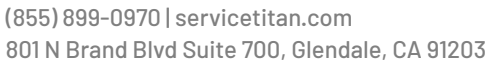
Customer Name: Phone Number:

Address:

HVAC INSTALLATION PROPOSAL EXAMPLE

We propose: To furnish and install and service under warranty (stated below) products or related equipment for your home or business in accordance with the conditions and specifications in this proposal.

INDOOR SECTION	OUTDOOR SECTION
<div><input type="checkbox"/> Remove old unit and haul off.</div> <div><input type="checkbox"/> Install new plywood flooring.</div> <div><input type="checkbox"/> Suspended attic unit from roof to lower sound level and provide proper condensate drainage.</div> <div><input type="checkbox"/> Reconnect existing gas line with new connector.</div> <div><input type="checkbox"/> New gas shut-off-valve.</div> <div><input type="checkbox"/> New flue pipe and cap.</div> <div><input type="checkbox"/> New Combustion air venting.</div> <div><input type="checkbox"/> New High Efficiency Air Cleaner. Type:</div> <div><input type="checkbox"/> New Wall Thermostat. Type:</div> <div><input type="checkbox"/> Other:</div>	<div><input type="checkbox"/> Remove old unit and haul off.</div> <div><input type="checkbox"/> New reinforced foundation pad.</div> <div><input type="checkbox"/> New Copper refrigerant line set.</div> <div><input type="checkbox"/> New gas shut-off-valve.</div> <div><input type="checkbox"/> New electrical disconnect switch.</div> <div><input type="checkbox"/> New flexible conduit and wire.</div> <div><input type="checkbox"/> Other:</div>
	MISCELLANEOUS
	<div><input type="checkbox"/> All work done in accordance to local codes.</div> <div><input type="checkbox"/> Cleaning of the work area will be accomplished at the end of each day's work.</div> <div><input type="checkbox"/> Other:</div>
DUCTWORK	
<div><input type="checkbox"/> New supply air plenum (air distribution box).</div> <div><input type="checkbox"/> New supply air return.</div> <div><input type="checkbox"/> New vibration free duct connectors.</div> <div><input type="checkbox"/> Seal all new duct connections with duct sealer.</div> <div><input type="checkbox"/> Other:</div>	
	NOTES



GOOD. BETTER. BEST

We propose: To furnish and install and service under warranty (stated below) products or related equipment for your home or business in accordance with the conditions and specifications in this proposal.

[illegible]

PAYMENT INFORMATION

Customer Name:**Email:****Address:****Home Phone:****City:****State:****Zip Code:****Cell Phone:****Credit Card Type:**☐

Visa

☐

MasterCard

☐

American Express

☐

Discover

Credit Card #:**Expiration Date:** (mm/yyyy)**Name as Appears on Credit Card:****Security Code:** 3 Numbers on Back of Card**Full Payment: \$****Monthly Payment: \$****Start Billing on :****Cardholder Signature:****Date:** (mm/yyyy)

Terms: Unless otherwise indicated, full payment will be due upon the installation of equipment selected.

Note: This proposal may be withdrawn if not accepted within thirty (30) Days.

PROPOSAL SUBMITTED BY:

Signature:**Date:**

ACCEPTED BY:

Signature:**Date:**

The above prices, specifications and conditions are satisfactory. You are hereby authorized to do the above work as specified. It is agreed and understood by the parties that all equipment and parts which are sold pursuant hereto shall not become fixtures or part of the real estate where they are placed. Said parts and equipment shall at all times remain personal property and the title thereto shall remain with the seller unit payment in full is received. Buyer hereby agrees that all parts and equipment may be repossessed in the event of non-payment.