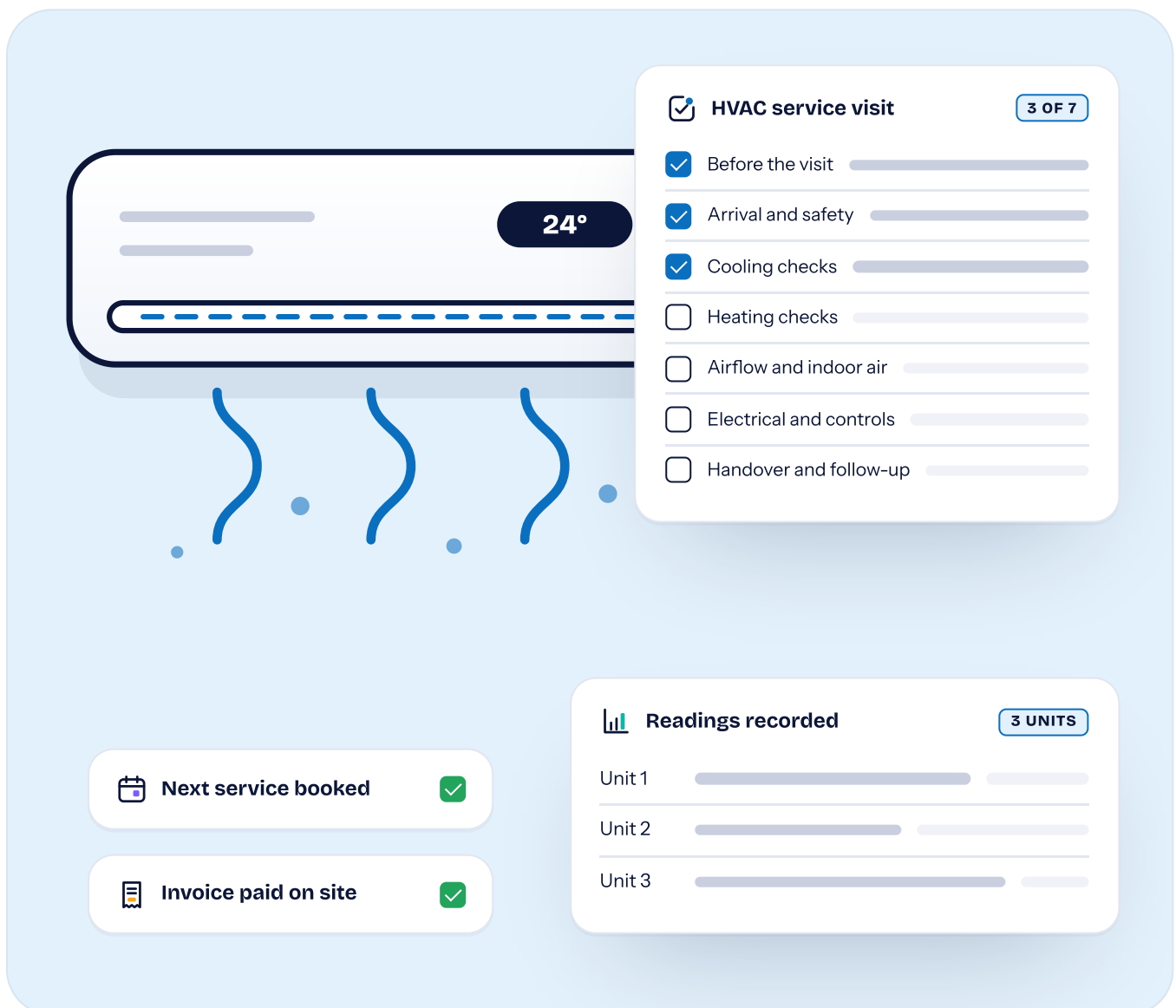


 For HVAC and air conditioning businesses

HVAC service checklist

Seven phases for every maintenance visit, from packing the van to booking the next service. Print one per job, tick as you go and keep the readings.



The illustration shows a white HVAC unit with a digital display showing '24°'. Below the unit are three blue wavy lines representing air flow. To the right of the unit is a checklist titled 'HVAC service visit' with a '3 OF 7' indicator. The checklist includes seven items, each with a checkbox and a progress bar. The first three items are checked: 'Before the visit', 'Arrival and safety', and 'Cooling checks'. The remaining four items are unchecked: 'Heating checks', 'Airflow and indoor air', 'Electrical and controls', and 'Handover and follow-up'. Below the checklist is a 'Readings recorded' section with a '3 UNITS' indicator. It contains three rows for 'Unit 1', 'Unit 2', and 'Unit 3', each with two progress bars. To the left of the readings section are two buttons: 'Next service booked' and 'Invoice paid on site', both with green checkmark icons.


Next service booked



Invoice paid on site



Readings recorded

3 UNITS

Unit 1
Unit 2
Unit 3

✓ 42 checks in visit order

 Space for readings and parts

 Maintenance plan pricing sheet

One visit, seven phases

Work through the phases in the order the visit actually happens. Experienced technicians often run the cooling, airflow and electrical checks together while the unit is open: the list is there so nothing is missed, not to slow you down.



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KEY

☐ tick when done down

CERTIFIED

certified or qualified technician only

RECORD

write the reading

How to use this checklist

A written checklist stops steps being skipped when a technician is rushed or new. It lets you price a visit properly, because you know exactly what is included, and it gives the customer a clear record of what was done.

1 Print one job sheet per visit

Fill in the customer and equipment on the next page, then tick each phase in order.

2 Skip what doesn't apply

No heating checks on a cooling-only split unit. Cross the section through so the record is clear.

3 Record, don't just tick

A ticked list can't show a trend. Readings can, such as a coil getting dirtier each quarter.

4 Finish on site

The visit isn't done until the customer has a summary, an invoice and the next date in the diary.



Split units in hot climates

In Lagos, Accra or Abuja, wall-mounted splits run for many hours a day. Dust and humidity block filters and drain lines quickly, so cooling and drain checks come first. Unstable power and generator changeovers are hard on compressors and boards, which is why the stabiliser check is on the list. Many businesses service split units every quarter rather than once a year.



Central systems, four seasons

In the US, Canada or the UK, a home often has a central air conditioner or heat pump plus a gas furnace or boiler. Here the seasonal split matters: ENERGY STAR recommends a contractor check-up every year before each season, so book cooling checks in spring and heating checks in autumn.



REFRIGERANT AND GAS: CERTIFIED WORK ONLY

Refrigerant handling is regulated in many countries. In the US, the EPA requires Section 608 certification for technicians who maintain, service, repair or dispose of equipment that could release refrigerants. In Great Britain, people working on equipment containing F gas need their own F gas qualification. Gas appliance work has its own rules too. Check what applies where you work before anyone on your team touches refrigerant or gas lines.



Nothing skipped

The same visit from every technician, new or rushed.



Easy to price

You know exactly what a visit includes.



A clear record

What helps a customer decide to renew a plan.

Sources checked on 1 October 2026: ENERGY STAR maintenance checklist (energystar.gov), EPA Section 608 technician certification (epa.gov), GOV.UK guidance on working with F gas.



Before the visit

Customer	Date
Address and access	Arrival window
Phone	Technician

Equipment on site

UNIT	TYPE AND LOCATION	MAKE AND MODEL	AGE	LAST SERVICE NOTES
1				
2				
3				
4				

Problems the customer reported when booking

Prepare the job

The day before

- ☐ Confirm the booking, address and access instructions with the customer.
- ☐ Check the customer's record: equipment type, make, model, age and last service notes.
- ☐ Note any problems the customer reported when booking.
- ☐ Pack filters in the right sizes, cleaning supplies, coil cleaner and common parts.
- ☐ Check tools and gauges are working and calibrated.
- ☐ Plan the route and arrival window, and tell the customer if you are running late.

PARTS AND FILTERS TO PACK

2

ON SITE

Arrival and safety

- ☐ Introduce yourself, confirm the job and ask about any new problems.
- ☐ Find the isolator or breaker and switch off power before opening any unit.
- ☐ Check the work area is safe: ladders, roof access, wet floors, pets.
- ☐ Protect floors and furniture near the indoor unit.
- ☐ Take "before" photos of the units and any visible damage.

3

COOLING

Cooling system and air conditioning

- ☐ Remove, clean or replace the indoor air filters.
- ☐ Clean the evaporator (indoor) coil.
- ☐ Clean the condenser (outdoor) coil and clear leaves, dust and debris around the unit.
- ☐ Clear and flush the condensate drain line and check the drain pan for leaks.
- ☐ Check refrigerant pressures and look for signs of leaks. **CERTIFIED**
- ☐ Check the fan motors and blades for wear, noise and balance.
- ☐ Check the capacitor and contactor for damage or wear.
- ☐ Measure supply and return air temperature and record the difference. **RECORD**

SUPPLY AIR

_____ °

RETURN AIR

_____ °

DIFFERENCE

_____ °

PRESSURES

NOTES ON COOLING

4

HEATING

Heating system checks

For furnaces, boilers and heat pumps. Cross this section through on cooling-only units.

☐ Check gas or oil connections, gas pressure and burner combustion.

QUALIFIED

☐ Inspect the heat exchanger for cracks or corrosion.

☐ Test the ignition and flame sensor.

☐ Check flue and venting are clear and secure.

☐ For heat pumps, test the reversing valve and defrost cycle.

☐ Test any carbon monoxide alarm near the appliance.

5

AIRFLOW

Airflow and indoor air

☐ Clean and adjust the blower and its components.

☐ Check visible ductwork for gaps, damage or loose joints.

☐ Check vents and grilles are open and unblocked.

☐ Note any rooms the customer says are too hot or too cold.

Rooms too hot or too cold, and what you found

**WHY AIRFLOW MATTERS**

ENERGY STAR's maintenance checklist notes that airflow problems can reduce a system's efficiency by up to 15%, and recommends a contractor check-up every year before each season.

NOTES ON HEATING



Electrical and controls

- ☐ Tighten electrical connections and check wiring for heat damage.
- ☐ Measure voltage and current on motors against the manufacturer's rating.
- ☐ Lubricate moving parts where the manufacturer specifies.
- ☐ Test the thermostat or remote and check its settings.
- ☐ Run the system through a full start, run and stop cycle.
- ☐ Where power is unreliable, check the voltage stabiliser or surge protector.

RECORD

Readings by unit

UNIT	VOLTAGE	CURRENT	RATING	SUPPLY / RETURN	PRESSURES
1					
2					
3					
4					

Parts used

PART	QTY	UNIT	PRICE

FAULTS FOUND

Handover and follow-up

- ☐ Take "after" photos.
- ☐ Record readings, parts used and any faults found on the job record.
- ☐ Explain what you did and anything that needs attention, in plain words.
- ☐ Give or send a quote for any repair you recommend.
- ☐ Send the invoice and take payment before you leave, or send a payment link.
- ☐ Book the next service visit and confirm the date with the customer.
- ☐ Ask for a review if the customer is happy.



Service summary for the customer

Leave a copy or send a photo

What we did today

Needs attention with a quote attached if a repair is recommended

Next service date

Paid card, transfer, payment link

Technician signature

Customer signature

INTERNAL NOTES FOR NEXT TIME



Price a maintenance plan

Once you know what a visit includes, you can sell it as a plan. Plans are recurring revenue, and they fill your calendar in quiet months.

Worked example

CUSTOMER	UNITS	VISITS A YEAR	PER UNIT PER VISIT	YEARLY PLAN VALUE
Small office in Abuja	8 split units	4	₦15,000	₦480,000
Family home in Lagos	4 split units	4	₦12,000	₦192,000
Homeowner in Texas	1 central system	2 (spring, autumn)	\$95	\$190

These figures are an illustration, not market rates. Set your own prices from your costs. If the Abuja visit takes one technician about four hours, that is ₦120,000 for half a day's work, before parts.

Your plan

$$\boxed{\text{UNITS}} \times \boxed{\text{VISITS A YEAR}} \times \boxed{\text{PRICE PER UNIT PER VISIT}} = \boxed{\text{YEARLY PLAN VALUE}}$$

CUSTOMER	UNITS	VISITS A YEAR	PRICE PER VISIT	YEARLY VALUE

Mistakes to avoid

- ☐ A list so long technicians stop using it.
- ☐ Leaving without booking the next visit.
- ☐ Ticking without recording readings.
- ☐ One checklist for splits, central systems and boilers alike.
- ☐ Leaving the invoice for later.

CUSTOMERS TO OFFER A PLAN TO FIRST

Save this checklist once. Every visit starts from it.

startbuddi doesn't replace your gauges or your judgement. It handles the paperwork around the visit: the booking, the checklist, the customer record and getting paid.



The checklist as a task

In Work, save "HVAC service visit" as a task and add each check as a subtask. Set it to repeat for plan customers.



Online booking

Create a service such as "AC service, up to 3 units", require a deposit and choose when reminder emails go out.



Equipment history

Each customer in Customers keeps their bookings, messages, invoices and your notes on make, model and readings.



Paid on the day

Create an invoice from the booking or send a payment link. Card, bank transfer or USSD through Paystack, or card through Stripe.



Plans as subscriptions

In Get Paid, create a monthly or yearly plan and send each customer a subscribe link. Your provider charges the renewals.



Chip on every screen

startbuddi's AI drafts replies, follow-ups and quotes while you're on a job.

Set it up in an afternoon



Add your services

Prices, durations and a deposit



Save the checklist

One task, seven phases as subtasks



Import customers

From a spreadsheet (CSV)



Connect payments

Your own Paystack or Stripe

Try it on your next visit

Set up your booking page, the checklist and your first invoice in one afternoon.

[Start free at startbuddi.com](https://startbuddi.com)

Free plan available

