

Furnace and A/C Bid Analysis Worksheet

Contractor's Information	Contractor 1	Contractor 2	Contractor 3	Notes
Contractor Name				
Contractors License Status www.ccb.state.or.us/search/				
Workmen's Comp Insurance				
Cost/Qualifications				
Cost estimate from contractor				
Deposit requirements				
Payment terms (10 days, 30 days, upon completion)				
Materials/Warranties				
Manufacture of new furnace unit				
Energy efficiency rating of the new furnace				
Manufacture of new A/C Compressor				
Energy efficiency rating of the A/C compressor				
Manufactures warranty for furnace unit				
Manufactures warranty for A/C compressor				
Contractor's warranty				
Extended warranty options				
Yearly maintenance contract options from contractor				
Scope Inclusions & Exclusions				
Removal of existing furnace and/or A/C compressor				
Legal disposal of furnace, A/C compressor, & refrigerant				
Adjustments to existing ducts to accept new components				
Inspection and repair of air supply and return ducting				
Labor to install new furnace				
New or re-use line-set to the AC compressor				
New or re-use pad for compressor unit				
Confirm current gas and electricity supplies are sufficient for the new furnace and A/C compressor				
Labor to install new compressor unit including concrete or plastic installation pad				
Connect existing power source to the furnace and/or compressor				
If applicable connect gas line to new furnace				
New or re-use the flue for the furnace				
If a new flue is going to be installed are all the components (boots, fire stops, termination caps, elbows, fresh air make-up) and labor included?				
New or re-use control wires for the AC compressor				
Filter location (top, bottom, behind grill)				
Filter type (standard plated , high capacity pleated, or electronic)				
Supply and install new ducting to complete the installation				
Vacuum and charge the new compressor and line-set.				
New or re-use thermostat				
Manufacture and type of new thermostat				
Start up new furnace and A/C compressor				
Start up procedures and complete forms per manufactures recommendations				
Basic balancing of supply registers				
Start up and operation training				
Schedule to complete (number of working days)				
Clean up all debris				