

HVAC Service Crew Customer Intake Printable

CREW / TEAM LEAD

CUSTOMER NAME

CUSTOMER PHONE / EMAIL

SYSTEM LOCATION

RECORD DATE

EQUIPMENT TYPE

SYSTEM ZONE

☐

☐

☐

☐

FILTER REFRIGERANT NOTE

PREFERRED CONTACT METHOD

☐

☐

☐

☐

REQUESTED EQUIPMENT / ZONES

PREFERRED SCHEDULE

ACCESS / PREPARATION NOTES

ADDITIONAL INTAKE NOTES