

[Your Business Name]

[Street Address]

[City, State ZIP]

[Phone] · [Email]

[Website]

License #: [License Number]

SERVICE AGREEMENT

Agreement #

[0001]

Plan

[Plan Name]

Start date

[MM/DD/YYYY]

End date

[MM/DD/YYYY]

CUSTOMER

[Customer Name]

[Mailing Address]

[City, State ZIP]

[Phone] · [Email]

SERVICE ADDRESS

[Service Address]

[City, State ZIP]

Access: [gate code, pets, contact on site]

Preferred visit times: [days / times]

Covered equipment	Brand / model	Serial #	Location	Installed
[e.g. Air conditioner / heat pump]	[Brand, model]	[Serial]	[Side yard]	[Year]
[e.g. Furnace / air handler]	[Brand, model]	[Serial]	[Basement]	[Year]

SCHEDULED VISITS

This agreement includes [2] scheduled maintenance visits per year: a cooling tune-up in [spring] and a heating tune-up in [fall]. We will contact you to schedule each visit.

COOLING TUNE-UP INCLUDES

- ☐ Check thermostat settings and operation
- ☐ Inspect / replace air filter (standard size)
- ☐ Clean outdoor coil and check for obstructions
- ☐ Check refrigerant pressures and temperatures
- ☐ Check capacitors, contactor and electrical connections
- ☐ Measure amp draw on motors and compressor
- ☐ Clear condensate drain and check pan
- ☐ Check temperature split and airflow

HEATING TUNE-UP INCLUDES

- ☐ Check thermostat settings and operation
- ☐ Inspect / replace air filter (standard size)
- ☐ Inspect burners, ignition and flame sensor
- ☐ Inspect heat exchanger and venting (visual)
- ☐ Check gas pressure and test safety controls
- ☐ Test for carbon monoxide at the appliance
- ☐ Check blower motor, belts and electrical connections
- ☐ Heat pumps: test defrost and auxiliary heat

MEMBER BENEFITS

Priority scheduling for repair calls: [within X business days / ahead of non-members]

Discount on repairs: [0]% off parts and labor

Diagnostic / trip fee: [waived / \$0.00] during the agreement

[After-hours rate: standard rate / no overtime charge]

[Other benefit, e.g. discount on replacement equipment]

PRICE AND PAYMENT

Plan price: [\$0.00 per year] or [\$0.00 per month]

Payment method: [card on file / ACH / check]

Due: [on signing / monthly on the Xth]

Additional equipment: [\$0.00 per system per year]

Repairs, parts and refrigerant are not included unless listed above and will be quoted before work is done.

NOT INCLUDED

Repairs, replacement parts, refrigerant, duct cleaning, and damage caused by power surges, flooding, neglect, lack of access or work by others, unless listed above. [Edit this list to match your plan.]

TERM, RENEWAL AND CANCELLATION

Term: this agreement runs from the start date to the end date above. [It renews automatically on [renewal date] for another [12] months at [\$0.00 per year / the price shown above], unless we notify you of a new price at least [30] days before renewal or either party cancels before the renewal date. We will remind you before it renews.] [Or: it does not renew automatically.]

Cancellation: you may cancel at any time by [phone / email / online]. [Refund terms, e.g. unused visits are refunded at \$0.00 each, less any discounts already received.] [Add any notice or cancellation terms your state requires.]

TERMS

Scheduled visits are performed during normal business hours. The customer will provide safe access to the equipment. Maintenance helps equipment run efficiently but does not guarantee against breakdowns. [Add your warranty, liability and any other terms your state requires.]

Customer signature

Date

Company representative

Date

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