

Free printable from Deepseal · usedeepseal.com/hvac-material-list-template · Version: September 2026 · The pick list is the sheet the crew loads from, one per job. Appendix A is a one-unit nameplate sheet the tech fills at startup or on the first maintenance visit, then copies into the Equipment list tab of the workbook.

HVAC Job Material Pick List

Job #		Install date	
Customer		Prepared by	
Address		Crew / truck	
System	☐ Split AC + furnace ☐ Heat pump + air handler ☐ Packaged / RTU ☐ Mini split ☐ Other: _____	Tonnage / AHRI ref	
Line run (ft)		Nameplate MCA / MOP	

Sizes come from the outdoor unit's install manual (line set), the furnace vent table (PVC diameter and elbows), the nameplate (MCA, MOP) and the local code. Write the source in the Size basis column. Staged means in one pile at the shop, Loaded means on the truck. Fill Used and Returned after the job.

Item	Size / spec	Size basis	Qty	Unit	Staged	Loaded	Used	Returned
Equipment								
Condenser / heat pump				ea	☐	☐		
Furnace / air handler				ea	☐	☐		
Matched coil (AHRI ref: _____)				ea	☐	☐		
Thermostat				ea	☐	☐		
Filter rack / media cabinet				ea	☐	☐		
Line set and refrigerant								
Line set (liquid x vapor x length)		manual table		ea	☐	☐		
Line isolators / hangers (one per 8 ft)				ea	☐	☐		
Liquid-line filter drier				ea	☐	☐		
Trim charge (oz per ft past factory charge)		product data		oz	☐	☐		

Item	Size / spec	Size basis	Qty	Unit	Staged	Loaded	Used	Returned
Nitrogen (purge and pressure test)				cyl	☐	☐		
Brazing rod, flux					☐	☐		
Venting and gas (furnace jobs)								
PVC vent pipe (diameter from vent table)		vent table		ft	☐	☐		
Elbows (each one shortens the allowed run)				ea	☐	☐		
Concentric termination kit				ea	☐	☐		
Gas: union, drip leg, shutoff, flex				set	☐	☐		
Electrical (from nameplate MCA / MOP, confirm with AHJ)								
Disconnect, within sight of unit				ea	☐	☐		
Breaker (up to MOP)		nameplate		ea	☐	☐		
Conductors (at least MCA)		nameplate		ft	☐	☐		
Liquidtight whip				ea	☐	☐		
Service receptacle (within 25 ft)				ea	☐	☐		
Thermostat wire (18/5 or 18/8)				spool	☐	☐		
Condensate								
3/4 in PVC drain and fittings, trap				ft	☐	☐		
Float switch (UL 508)				ea	☐	☐		
Secondary pan / condensate pump				ea	☐	☐		
Duct, pad and mounting								
Plenum / transition / takeoffs				ea	☐	☐		

Item	Size / spec	Size basis	Qty	Unit	Staged	Loaded	Used	Returned
Flex duct, straps (1-1/2 in, every 4 ft)				ft	☐	☐		
UL 181B-FX tape, 181B-M mastic				roll / gal	☐	☐		
Pad or stand (1 in larger than unit each side)				ea	☐	☐		
Curb adapter / curb + gasket (RTU)				ea	☐	☐		
Consumables and other								
Screws, hanger strap, sealant, zip ties					☐	☐		
Permit				ea	☐	☐		
					☐	☐		
					☐	☐		
					☐	☐		

Stat wires on site (count)		Old curb opening (RTU)	
Notes			
Loaded by / date		Returned to stock by / date	

Appendix A: Equipment Nameplate Sheet

One sheet per unit. Fill it from the nameplate at startup or on the first maintenance visit, photograph the plate, and copy the row into the Equipment list tab. This row is what the maintenance agreement is written against.

Customer / site		Unit tag	
Address		Display name (e.g. downstairs A/C)	
Location on site		Area served	
Type	☐ Split AC ☐ Heat pump ☐ Gas furnace ☐ Air handler ☐ Packaged / RTU ☐ Mini split ☐ Other: _____	Brand	
Model		Serial	
Manufacture date (from serial)		Install date	
Capacity (tons / MBH)		Efficiency (SEER2 / EER2 / HSPF2 / AFUE / IEER)	
Refrigerant	☐ R-410A ☐ R-454B ☐ R-32 ☐ R-22 ☐ Other: _____	Full charge (lb)	
Volts / phase		MCA / MOP	
Filter size x qty		Belt size (or direct drive)	
Thermostat / controls		Disconnect location	
Warranty registered	☐ Yes, date: _____ ☐ No	Parts warranty ends	
Compressor / HX warranty ends		Labor warranty ends	
Agreement plan	☐ None ☐ Bronze ☐ Silver ☐ Gold	Last service / next due	
Condition (1 to 5)		Nameplate photo taken	☐ Yes
Access notes			
Notes			
Recorded by / date		Entered in workbook	☐ Yes, date: _____

Keep the nameplate sheet in the customer's folder with the photo. The spreadsheet version of both sheets, with the filled-in examples, the cost columns and the drawing-set equipment schedule tab, is at usedeepsel.com/hvac-material-list-template. Every free checklist and template in the set is at usedeepsel.com/checklists.