

HVAC Customer Site Assessment Form

PowerTrak Efficiency Systems
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Bristol, RI 02806 | 888.402.5590



Rep Name: _____

Customer Information (items in RED are required information)

Corporate Legal Name _____
Operating Name (DBA) _____
Corporate Street Address _____
City, State, Zip _____
Contact Person _____
Contact's Title _____
Office Phone _____
Mobile Phone _____
Contact Email _____
Length of Time in Business _____
Number of Employees _____
Federal Tax ID # _____

Property Information (Please fill out separate additional forms for multiple locations)

Building:

Property Address (if different than above) _____
City, State, Zip _____
Number of Floors _____
Approximate Square Feet per Floor _____
Total Building Square Feet _____
Approximate Energy Spend Per Year - Oil/Gas/Electric \$ _____
How many individual HVAC Units _____
Number of Thermostats / Zones _____
Are thermostats located in a central location
connect to remote sensors? (Yes/No) _____

Building Automation System (BAS) (If you do not have a BAS you are finished)

Is there a Building Automation System (Yes/No) _____
Does the BAS monitor energy usage (Yes/No) _____
Does the BAS PC have Internet access (Yes/No) _____

Building Automation System:

Remote Access Required to the BAS _____
- Manufacturer / Make _____
- Model _____
- Version _____

Approximate number of points monitored/managed
by the BAS (select one) 100 / 250 / 500 / 1000+ 100 250 500 1000+

BAS Point List:

Please attach a list of all points monitored / controlled

Examples of Listed Points:

1 Makeup Air, 1 Room A/C, 3 York Spinnaker, 3 Fresh Air Units, 6 IH Units [tube heaters], 1 Tecfa Air Curtain [garden doors],
7 Electric Water Heaters, 5 Electric Unit Heaters, 6 Supply Air Fans, and 22 Exhaust Fans
