

Heat Pump Replacement — Request for Quote

Like-for-like replacement of existing heat pump with a **Trane XV20i TruComfort variable-speed** matched system. Please quote to the scope below so all bids are comparable.

Owner: _____ Property: _____ Date issued: _____

Quote due by: _____

EXISTING SYSTEM (OWNER TO CONFIRM)

Current outdoor unit (make / model / tonnage)	
Current indoor unit (air handler / coil model)	
Current refrigerant	R-410A / other: _____
Backup heat type	Electric strip heat / Dual-fuel furnace / None
Approx. age of system	

REQUIRED SCOPE — EVERY BID MUST INCLUDE

- **AHRI-matched variable-speed system:** XV20i outdoor unit + matched variable-speed air handler (or communicating furnace) + ComfortLink II communicating thermostat. Outdoor-only swaps onto the old indoor unit will not be accepted.
- **Manual J load calculation** to size the system — do not simply match existing tonnage. Provide the resulting design load and selected tonnage.
- **Line-set plan:** state whether the existing line set is reused, flushed, or replaced, and the refrigerant of the new system (R-454B / R-410A). No mixing of refrigerants.
- **Backup heat** carried over and correctly sized/controlled with the new system.
- **Trane 10-year parts warranty** registered by installer within 60 days; state labor/workmanship warranty separately.
- **Rebates & incentives** identified (utility rebates, federal 25C heat-pump tax credit, high-SEER2 offers).
- Permits, electrical/breaker changes, disposal of old equipment, and startup/commissioning included.

BIDDER TO COMPLETE

Company / Trane Comfort Specialist?	
Quoted outdoor model (XV20i #)	
Quoted indoor air handler / coil model	
Thermostat model	
AHRI reference # & rated SEER2 / HSPF2	
Manual J design load / selected tonnage	
Refrigerant & line-set plan	
Backup heat provided	

Parts warranty / labor warranty	
Rebates / tax credits identified (\$)	
Total price (after rebates)	\$
Start date / duration	

Hand one copy to each dealer. Ask them to fill the lower table and attach their formal written quote. Score responses on the reverse sheet.

Dealer Quote — Scoring Sheet

Score each criterion 1–5 per dealer, multiply by the weight, and total. Highest weighted total is the strongest apples-to-apples bid.

Scale: 5 = fully meets / best · 4 = good · 3 = adequate · 2 = weak · 1 = missing or poor. Enter the **weighted** value (score × weight) in each dealer cell.

CRITERION	WEIGHT	DEALER A	DEALER B	DEALER C
AHRI-matched system quoted (outdoor + indoor + thermostat)	×3			
Manual J load calc included (not "match old tonnage")	×3			
Correct sizing — no oversizing of variable-speed unit	×2			
Line-set & refrigerant plan clear (R-454B vs R-410A)	×2			
Total price / value after rebates	×3			
Parts + labor warranty; registration handled	×2			
Backup heat carryover addressed & sized	×1			
Rebates / 25C tax credit identified	×1			
Trane Comfort Specialist / reviews / reputation	×2			
Timeline & availability	×1			
Permits, disposal, commissioning included	×1			
WEIGHTED TOTAL	/105			

DEALER A

Company:

Price \$

Notes:

DEALER B

Company:

Price \$

Notes:

DEALER C

Company:

Price \$

Notes:

RED FLAGS — KNOCK A BID DOWN IF YOU SEE THESE

- Quotes only the outdoor unit and reuses your old single-speed air handler (kills the variable-speed benefit; not AHRI-matched).
- Sizes by "your old unit was X tons" with no Manual J.
- Vague on refrigerant or plans to reuse the line set without flushing when switching to R-454B.
- No mention of warranty registration, permits, or commissioning.
- Lowest price but missing scope items — cheap because it's a smaller job.

Max weighted score = 105 (all fives). Compare totals, then sanity-check the top two against the red-flag list before signing.