UPS Pre-Sale Checklist

Site Contact		**Company Contact**	
Site Address 1		**Company Address 1**	
Site Address 2		**Company Address 2**	
Site Phone		**Company Phone**	
Site Email		**Company Email**	

Type of Project: ☐ New Construction ☐ Existing Construction / Retrofit

Expected Delivery Date: _____

Incoming Electrical Service Type: ☐ Single Phase ☐ Dual (Split) Phase ☐ Three Phase

Incoming Electrical Service Size (amps): _____

Required UPS Load: VoltAmps:_____ Watts:_____

Desired Battery Backup Time: _____

Desired UPS Installation Type: ☐ Wall Mount ☐ Rack Mount ☐ Free-Standing Cabinet ☐ Undecided

Desired UPS Installation Location: ☐ Main Panel ☐ Secondary Panel ☐ Remote Point-of-Service

Installation Location Floor Type: ☐ Unfinished ☐ Finished Type if Finished: _____

Installation Location Door Dimensions: Height: _____ Width: _____

Will the installation location be temperature and humidity controlled: ☐ Yes ☐ No ☐ Unsure

Is remote network connectivity and monitoring required? ☐ Yes ☐ No ☐ Unsure

Will a solar system be installed onsite? ☐ Yes ☐ No ☐ Unsure

Will a backup generator be installed onsite? ☐ Yes ☐ No ☐ Unsure

Is future expansion expected? ☐ Yes ☐ No ☐ Unsure

Are there site and/or local power grid issues? ☐ Blackouts ☐ Brownouts ☐ Power Sags ☐ Power Surges
☐ Overvoltage ☐ Normal Mode Noise ☐ Common Mode Noise
☐ Frequency Variation ☐ Switching Transients
☐ Harmonic Distortion ☐ Unsure ☐ Other: _____

Other system notes, requirements and considerations: _____

_____

_____

_____

_____

Load Calculation Worksheet: Sizing a UPS

Circuit	

Instructions:

1) List the equipment to be protected by the UPS. Include everything that will be connected to the circuit, including electronics and appliances.
2) List the amps, volts and watts for each device. This information is typically found on device and power supply labels and/or manuals and specification sheets. If the watt information isn't available, we'll be able to calculate it from the VoltAmp information as noted below.
3) Multiply the amps by the volts to determine the VoltAmps (VA).
4) If needed, convert VoltAmps to watts (W) by multiplying the VoltAmp total by 0.9. (1 VA = 0.9 W for most devices)
5) Add the total VoltAmps and watts.
6) Multiply the total VoltAmps and watts by 1.2 to accommodate for future system expansion and protection.
7) Use the grand total located on the bottom line to select a UPS. Ensure that the total VA and watt rating of the connected equipment does not exceed the VoltAmp and watt rating on the UPS.

	Step 1	Step 2	Step 2		Step 3	Step 4	Step 2
	Device	**Amps**	**Volts**		**VoltAmps**		**Watts**
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
			x	=		x 0.9 =	
Step 5			**Total VoltAmps & Watts:**				
Step 6			**Future Expansion:**		x 1.2		x 1.2
Step 7			**Recommended UPS Power:**				

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UPS Maintenance Log

Client	
Service Date	
UPS Model	
UPS Location	

UPS systems optimize power flow while protecting against damaging power loss and fluctuations. Annual maintenance helps identify any potential problems and ensures your devices remain protected.

Environment

Room Temperature	
Humidity	
Airflow	
Dust & Obstructions	

UPS batteries are very sensitive to temperature and anything that will restrict airflow, including dust, grime and clutter. A proper environment is 68° - 77°F and dry (less than 60% humidity).

Diagnostics

Communications	
Software Version	

If equipped, does your UPS system have internet access and is the software up-to-date?

Battery Health (1)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Batteries are the primary cause of UPS failure and, just like all devices, they have an expected lifecycle. IEEE standards consider a UPS battery at the “end of its useful life” when it can no longer supply 80% of its rated capacity in ampere-hours.

Typical Battery Life by Type

Lead Acid
(SLA / VRLA)
2 – 3 years

Lithium Iron Phosphate
(LIFEPO4)
8 – 10 years

Sodium-Ion
(NA-ION / SIB)
10 – 15 years

Battery Health (2)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Battery Health (3)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Battery Health (4)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Battery Health (5)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Battery Health (6)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Battery Health (7)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

Battery Health (8)

Model / Serial #	
Age	
% of Useful Life	
Swelling / Damage	
Battery Self-Test	

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