

Water Softener Installation Checklist

Use this checklist after sizing your system to plan a water softener installation.

PROJECT SUMMARY

Household Size:	
Water Hardness (grains):	
Daily Water Usage:	
Recommended Capacity:	
Installation Location:	
Planned Date:	

HOW TO USE THIS CHECKLIST

- 1 Run the Water Softener Size Calculator using accurate measurements.
- 2 Confirm household size and water hardness test results.
- 3 Review each phase before purchasing and installing the system.
- 4 Verify drain and electrical access at the install location.
- 5 Confirm permit or inspection requirements if applicable.

PHASE 1 — PLANNING

- ☐ Test or confirm water hardness in grains per gallon.
- ☐ Calculate daily softening capacity needed for household size.
- ☐ Choose installation location near main water line and drain.
- ☐ Confirm electrical outlet availability nearby.
- ☐ Check local code requirements for softener drain discharge.

PHASE 2 — SITE PREPARATION

- ☐ Shut off main water supply before installation.
- ☐ Confirm bypass valve location and function.
- ☐ Verify drain line routing and air gap requirements.
- ☐ Check floor drain or standpipe is within hose reach.
- ☐ Clear space for the brine tank and control head access.

PHASE 3 — MATERIAL ORDERING

- ☐ Confirm system capacity matches calculated requirement.
- ☐ Order fittings sized for existing pipe diameter.
- ☐ Order initial salt supply for the brine tank.
- ☐ Confirm bypass valve kit is included or ordered separately.
- ☐ Verify warranty registration requirements.

PHASE 4 — QUALITY & RISK CONTROL

- ☐ Check all plumbing connections for leaks after installation.
- ☐ Program regeneration schedule based on household usage.
- ☐ Test water hardness after startup to confirm performance.
- ☐ Verify drain line has proper air gap (no direct connection).
- ☐ Review salt level and refill schedule with the homeowner.

