

HVAC/R Service Call Command

Capture the fault. Prove the fix. Protect the callback.

Scattered asset data, readings, parts, and approvals cause callbacks, underbilling, and weak service history.

01 INTAKE

CAPTURE ONCE. HAND OFF CLEANLY.

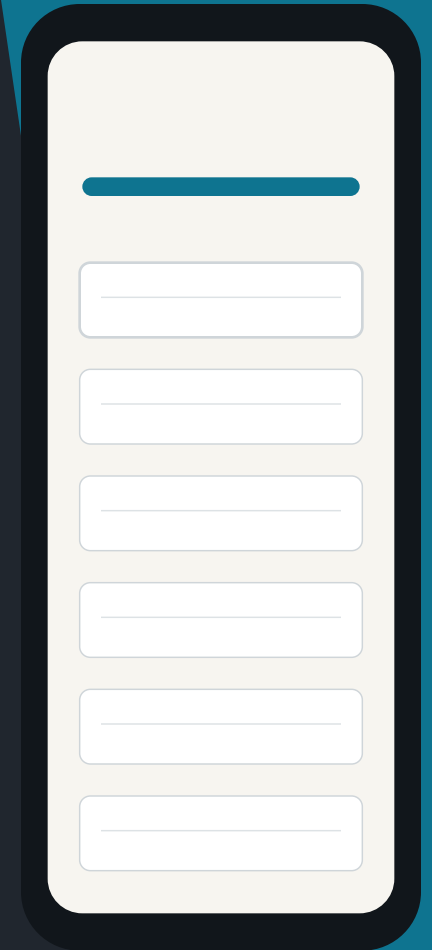
02 IDENTIFY

CAPTURE ONCE. HAND OFF CLEANLY.

03 MEASURE

CAPTURE ONCE. HAND OFF CLEANLY.

GALLERY EDITION - FREE PUBLIC NOTE



Call Intake and Site Access

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

WHAT IS THE REPORTED SYMPTOM?

WHEN DID THE SYMPTOM BEGIN?

IS THE FAULT CONSTANT OR INTERMITTENT?

WHAT CHANGED BEFORE THE FAULT?

WHAT OPERATING MODE WAS SELECTED?

HAS ANOTHER REPAIR BEEN ATTEMPTED?

WHAT AREAS OR PROCESSES ARE AFFECTED?

WHO CAN APPROVE ADDED WORK?

REF	QUESTION / CONDITION	IMPACT	OWNER	DUE	STATUS

Equipment Identity and Nameplate

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

PART/MATERIAL	PART NO.	QTY	SOURCE	STATUS

APPROVAL / SOURCE REFERENCE

UNAVAILABLE / SUBSTITUTED ITEM

RETURN / FOLLOW-UP STATUS

RESOURCE NOTES

Complaint and Fault Timeline

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

WHAT CONDITION LIMITED DIAGNOSIS?

WHAT ACTIVE HAZARD WAS OBSERVED?

WHAT SYSTEM WAS LEFT OUT OF SERVICE?

WHAT TEMPORARY MEASURE REMAINS?

WHAT APPROVAL IS STILL MISSING?

WHAT FOLLOW-UP IS TIME SENSITIVE?

ID	RISK / EXCEPTION	TREATMENT	OWNER	DUE	STATUS

Diagnostic Readings

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

Diagnostic Readings

Record the source, unit, and operating condition beside every value

TEST POINT	MODE	BEFORE	AFTER	UNIT	NOTES

REFERENCE CONDITION / BASELINE

INTERPRETATION / LIMITATION

NEXT TEST / NEXT ACTION

Inspection Findings and Photos

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

PHOTO / EVIDENCE 1

REF / LOCATION

OBSERVATION

PHOTO / EVIDENCE 2

REF / LOCATION

OBSERVATION

PHOTO / EVIDENCE 3

REF / LOCATION

OBSERVATION

ID	FINDING / CHANGE	IMPACT	OWNER	DUE	STATUS

EVIDENCE SUMMARY / HANDOFF TREATMENT

Authorized Work, Parts, and Materials

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

AUTHORIZED SCOPE / APPROVED CHANGE

WORK PERFORMED / CURRENT STATUS

PART/MATERIAL	PART NO.	QTY	SOURCE	STATUS

LABOR / TIME / SEQUENCE

EVIDENCE REFERENCES

UNFINISHED / RETURN WORK

Final Test and Quote Handoff

INTAKE

IDENTIFY

MEASURE

DIAGNOSE

REPAIR

VERIFY

Handoff gate

Close the record only when every exception has an owner and next step

- ☐ Final operating mode recorded
- ☐ Work summary is client-ready
- ☐ Open defects are listed
- ☐ Return visit owner assigned
- ☐ Final readings logged
- ☐ Parts used are itemized
- ☐ Quote items are separated
- ☐ Customer acknowledgement captured

CLIENT-READY OUTCOME SUMMARY

OPEN WORK / LIMITATION / QUOTE ITEM

PRIORITY	NEXT ACTION	EVIDENCE / SOURCE	OWNER	DUE	STATUS