Job Assignment from Paul/Jim

1. Look up customer on S:\Aftermarket Division\ALL Customer (parts.service) Files/ (by customer folder name, ie: IPS - Tampa)
   1. Review reports from previous jobs for the same equipment/production line
      1. Note any previous issues noted from previous trips.
         1. Download any field service report that references specific settings when the system was running well.
   2. If the equipment is Heattek manufactured
      1. Move to the engineering project folder
         1. Review field service reports from installation E:\Projects\Projects range \Project number and customer name\Service
            1. Download reports that may be related to current service trip
         2. Review QA folder in the job to determine if original settings documentation is available E:\Projects\Projects range \Project number and customer name\QA (QC on older projects.
            1. Download documents if they are related to current issues.
         3. Check the Modifications folder in the Project folder to see if changes were made from the original project. E:\Projects\Projects range \Project number and customer name\\_M (Modification orders)
            1. Repeat search of service and QA folders for relevant information and download the information.
2. Verify contact information with Paul and Jim. Communicate with onsite contact to verify arrival day and time.
3. Meet with contact before service starts to verify customer expectations and the expected service timeline.

(2&3 are embedded in the assignment invite, not necessarily on the S: drive.

1. Are parts needed to complete the service?
   1. Yes
      1. Verify that the parts are onsite and all parts necessary to complete the service call are onsite.
         1. If all necessary parts are not onsite call Paul or Jim to find out when the parts will arrive or source parts locally
   2. No
      1. Start the service call
2. Complete the service call
   1. varies widely based on the type of service
3. End of service call
   1. Meet with contact and confirm what has been accomplished
      1. Everything is complete, no additional steps needed
      2. Goals not achieved
         1. Communicate with Paul and Jim before the meeting
         2. Verify what is needed to complete the service call to the contacts satisfaction.
         3. Identify what parts or additional time to complete the service will be needed.
         4. Direct the contact to communicate with Jim or Paul to order parts or schedule additional time to complete the service.
4. Generate service report and forward to Jim and Paul to review and forward to the customer