

# SERVICE DOCUMENT, FOLDER & BINDER GUIDE

	Traveler	Job Binder Template	SOP	Drawing	Questionnaire	Walkthrough Sheet	Quote Template	Rate Sheet/CP Price	BOM GP Template	BOM on drawing	QC Checklist	PDI Form	QC Binder	Project Plan - SAVE ONLY	Job Folder required for every job. Job Binder only required if stated below.	x Complete IP In Process Blank Future or Not Needed
Tanks & Wagons														Z	Job Folder for Service Manager	Job Binder for Shop Floor
Tank & Duo-Lift Wagon	x					x		x			x	x	x		Service Call Form, GP WO, Quote, QC Binder, Duo-Lift Warranty Form	Traveler set per unit (in one binder per customer), Data plate template, PDI form per unit
Tank & Dwayne Ent Wagon	IP					x		x			x	x	IP		Service Call Form, GP WO, Quote, QC Binder	Traveler set per unit (FUTURE), Data plate template, PDI form
4725 Tank & Wagon	IP					x		x			x	x	IP		Service Call Form, GP WO, Quote, QC Binder	Traveler set per unit (FUTURE), Data plate template, PDI form
8100 Delivery Unit	IP	IP		x		x		x	x		x	x	IP		Service Call Form, GP WO, Quote, QC Binder	Traveler set per unit (FUTURE), Data plate template, PDI form
Service Work															Job Folder for Service Manager	Job Binder for Shop Floor
NH3 M1								x							Service Call Form, GP WO	NOT AT THIS TIME
NH3 M5						IP	x	x							Service Call Form, GP WO, Estimate/Scope	NOT AT THIS TIME
NH3 M10							x								Service Call Form, GP WO, Estimate/Scope	NOT AT THIS TIME
Propane M1								x							Service Call Form, GP WO	NOT AT THIS TIME
Propane M5 - FCL	x					IP	x	x						x	Service Call Form, GP WO, Estimate/Scope	Index, Travelers
Propane M5 - Superior	x					IP	x	x						x	Service Call Form, GP WO, Estimate/Scope	Index, Travelers
Weld Repair											x		x		Service Call Form, Estimate, QC Checklist(Piping or Repair), QC Binder	Just QC Binder at this time
Storage Internal							x								Service Call Form, GP WO, Estimate/Scope	NOT AT THIS TIME
Fleet Inspections	x							x							Service Call Form, GP WO	1 Traveler per site, Several pages of Traveler Tab 2 (parts log)
Nutrien Site Inspections	x						x								Service Call Form, GP WO, Traveler per site	NOT AT THIS TIME
Hose Testing			x					x							Service Call Form, GP WO	NOT AT THIS TIME
Pump Rebuilds (Blackmer)															Service Call Form	Traveler (FUTURE)
Larger Projects															Job Folder for Service Manager	Job Binder for Shop Floor
Remount - FCL	x	x					x			x				x	Service Call Form, Quote, Walkthrough Sheet, QC Binder	Job Binder Template with Pics, Index, Travelers, Quote, Any drawings SM requested
Remount - All Other	x	x												x	Service Call Form, Estimate/Scope, QC Binder	Job Binder Template with Pics, Index, Travelers, Quote, Any drawings SM requested
Liquid Plant	x			x	x		x				IP			x	Service Call Form, GP WO, Questionnaire, Quote/Scope	Traveler & Second tab's signoff sheet, Site Drawing, Quote, Commissionnig doc
Liquid Skids	x			x	x		x		x	x				x	Service Call Form, Scope, Questionnaire	1 Traveler - Inload or Outload (whichever it is), Liquid Skid Drawings (see Michael P)
Dispensers	x			x	x		IP		IP	IP	IP		x	x	Service Call Form, Quote, QC Binder	1 Traveler per unit, Drawing
Dispensers (Superior Spec)	x			x			IP		IP	IP	IP		x	x	Service Call Form, Quote, QC Binder	1 Traveler per unit, Drawing (Their drawing, not ours)
MicroCote															Job Folder for Service Manager	Job Binder for Shop Floor
MicroCote Frames	x			x							x				Service Call Form	1 Traveler per order, Drawing
MicroCote Scale Tanks	x			x							x				Service Call Form	1 Traveler per order, Drawing
MicroCote Skids	x			x	x		x		x	x	x			x	Service Call Form Per Product (Procote, Anvol, etc), Questionnaire, Quote	Traveler, Drawing, QC Checklist
Manufactured Items															Job Folder for Service Manager	Job Binder for Shop Floor
Bumper	x			x				x		x					Service Call Form	1 Traveler per order, Drawing
Flow-Max Repair Kit	x							x							Service Call Form	1 Traveler per order
Manifold Stands	x			x						x					Service Call Form	1 Traveler per order, Drawing
Meter Cabinet	x			x				x		x					Service Call Form	1 Traveler per cabinet, Drawing
PneuCube	x		x	x				x		x					Service Call Form	1 Traveler per order, Drawing, SOP MF-1, SOP MF-2 (Portal/Service/SOPs)
Tank Skids (1000USWG)	x		x	x				x	x	x					Service Call Form, Quote	1 Traveler per order, Drawing, SOP MF-3, SOP MF-4 (Portal/Service/SOPs)
Tiedowns	x			x				x		x					Service Call Form	1 Traveler per order, Drawing
Torex Stands	x			x				x		x					Service Call Form	1 Traveler per order, Drawing
Valve Guards	x			x				x		x					Service Call Form	1 Traveler per order, Drawing