

Module 5: Parts

Goal: Capture exact equipment and part details, check availability, and order correctly, so the tech can finish the job in as few trips as possible.

About 9 minutes

All names, phone numbers, addresses, part numbers, and companies in this lesson are made-up examples. They are marked "(example)".

Why This Matters to the Employer

A tech who shows up without the right part has to come back. That's a second trip, a second drive, and a customer who waits longer. Getting part details right is one of the most useful things a desk person can do.

Get the Equipment Details

Before a tech goes out, try to learn what equipment they'll be working on. Ask the customer for:

- **Type:** furnace, AC, water heater, panel, disposal, and so on
- **Brand:** the company name printed on the unit
- **Model number:** the code for that product line
- **Serial number:** the code for that one unit
- **Age:** "About how old is it?"
- **Complete set or part:** "Do you need a complete set, or just part of a panel?"

These numbers are usually on a sticker or metal plate on the unit. Ask: "Can you send a photo of the sticker?" A photo beats reading numbers over the phone. Attach it to the ticket.

Part Numbers: Write Them Exactly

A **part number** is the exact code for one part. It might look like "EX-4471-B (example)".

- Write it exactly as given. Every letter, number, and dash.
- Read it back to the tech or supplier, one character at a time.
- Watch for look-alikes: the letter O and zero, the letter I and one, S and 5.
- If anything is unclear, ask for a photo of the old part or its label.

One wrong character can mean the wrong part. Then the tech is back where they started.

Check Availability

When a part is needed, find out where it is. There are usually four answers:

1. **On the truck.** The tech has it. Easy.
2. **In the shop.** Someone can bring it or the tech picks it up.
3. **At the supplier.** A **supplier** or **supply house** is the store or distributor your company buys from. Call to check stock.
4. **On order.** It has to be shipped. Ask for an expected date.

Write the answer and the date in the ticket.

Ordering a Part

Some desk people order parts. Some pass the request to **purchasing**, the person or team who buys for the company. Learn your company's process. When you do order, confirm:

- Part number
- Quantity
- Price
- Pickup or delivery
- Where it goes (shop, job site, or will-call counter)
- When it will be ready
- An order or confirmation number

Write all of it in the ticket. Then tell the tech.

Tell People About Delays

If a part delays the job, two groups need to know:

- **The tech and dispatcher**, so they can plan the schedule.
- **The customer**, so they aren't left wondering.

Give the customer the expected date and book the return visit if you can. If the date slips, call them again.

Do This, Not This

Instead of this...	Do this...
Write "motor for the AC"	Write the brand, model, and exact part number from the tech
Read a part number once and hang up	Read it back character by character and get a confirmation number
Wait for the customer to ask where the part is	Call them with the expected date and book the return visit

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

Andre (example), an HVAC tech for Example Heating & Air (example), finds a bad fan motor in the furnace at Tom Ellis's (example) home, 789 Demo Rd (example). He texts the office:

"Need fan motor. Model ABC-123 (example). Part # EX-4471-B (example). Not on truck. Photo attached."

Chris calls the supply house.

Supplier: Sample Supply Co. (example), this is Jordan.

Chris: Hi Jordan, this is Chris from Example Heating & Air (example). I need to check stock on part number E-X, dash, 4-4-7-1, dash, B.

Supplier: Let me look. Not in stock here. I can have it Thursday morning.

Chris: What's the price?

Supplier: It's on your account at the usual rate. I'll email the quote.

Chris: Great. Please order one, for pickup at your counter Thursday. Can I get an order number?

Supplier: Order number 55-0192 (example).

Chris: 55-0192. Thanks, Jordan.

Chris texts Andre: *"Motor ordered. Pickup Thursday AM at Sample Supply (example). Order #55-0192 (example)."*

Then Chris calls the customer, Tom Ellis (example), at (619) 555-0187.

Chris: Hi Tom, this is Chris from Example Heating & Air (example). The part Andre needs comes in Thursday morning. Can we book Thursday from 1 to 3 PM to finish the repair?

Caller: Yes, that works.

Chris updates the ticket with the part number, order number, pickup details, and the return visit.

What went right: Chris read the part number back clearly, checked stock, got a date and order number, told the tech, called the customer, and booked the return visit in one pass.

Quick Tips

- Ask for brand, model number, serial number, and age.
- Get a photo of the sticker or old part when you can.
- Write part numbers exactly. Watch for O vs. 0 and I vs. 1.
- Find out: on truck, in shop, at supplier, or on order?
- When ordering: number, quantity, price, pickup or delivery, date, order number.
- Part delayed? Tell the tech, dispatcher, and customer.
- Put it all in the ticket.

Quiz

1. Where can a customer usually find the model and serial number?

- a) On a sticker or plate on the equipment
- b) On their last bill
- c) Online

Answer: a. Most units have a label with these numbers. A photo is even better.

2. What's the difference between a model number and a serial number?

- a) There's no difference
- b) The model is the product line. The serial is that one unit.
- c) The serial number is the price

Answer: b. Both help get the right part. The serial identifies the exact unit.

3. A part number has a character that could be an O or a zero. What do you do?

- a) Guess
- b) Ask to confirm, or get a photo of the label
- c) Leave it out

Answer: b. One wrong character can mean the wrong part and a second trip.

4. Which is NOT something to confirm when ordering a part?

- a) Quantity and price
- b) Pickup or delivery and date
- c) The supplier's favorite brand

Answer: c. Confirm the facts that get the right part to the right place on time.

5. A part is delayed two days. Who needs to know?

- a) Only the tech
- b) The tech, the dispatcher, and the customer
- c) Nobody until it arrives

Answer: b. Everyone waiting on the part needs the new date.