

Module 6: Notes

Goal: Write job notes that are clear, complete, and short, so anyone on the team can pick up the job and know what to do.

About 7 minutes

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

Why This Matters to the Employer

Job notes are how the whole team stays on the same page. The tech reads them before the job. The dispatcher reads them to plan. Billing reads them to send the right invoice. A manager reads them if something goes wrong. Good notes mean fewer callbacks, fewer mistakes, and cleaner billing.

The Test for Good Notes

Ask yourself one question:

"Could someone who wasn't on this call understand it and act on it?"

If the answer is no, add what's missing. Write for the tech who is reading it in a truck between jobs. Write for the coworker covering your desk tomorrow.

What to Cover

Most good notes answer the same questions. Use this order so the team always knows where to look:

1. **Urgency:** emergency, same day, or scheduled
2. **Customer:** name and callback number
3. **Site contact:** name and number, if different
4. **Address and access:** full address, gate or lockbox info, parking, pets
5. **Problem:** what's wrong and when it started
6. **Equipment and parts:** brand, model, part numbers, photos
7. **Time:** arrival window and any limits
8. **Promised:** anything you told the customer you would do

Your company's software may have a separate box for some of these. Fill in the boxes, then use the notes for everything else.

Use the Customer's Words, Then the Facts

Write what the customer said in quotes. Then add facts you know.

Example: Customer says "loud banging when it turns on." Started yesterday. Water heater in garage. About 12 years old per customer.

Example (water damage): Customer says "water coming through the ceiling." Started 11:40 PM. Pipe burst upstairs. Insurance claim # CL-20817 (example), adjuster Nina Shah (example), (619) 555-0175.

The customer's words help the tech. "Banging" and "hissing" can point to different problems. Don't guess the cause yourself. Leave that to the tech.

Keep It Short and Clear

- Use bullet points, not long paragraphs.
- One fact per line.
- Skip slang, jokes, and opinions about the customer.
- Only use abbreviations your shop uses. If you're not sure, spell it out.
- Write times with AM or PM.

Remember, customers can sometimes see notes or invoices. Write every note as if the customer might read it.

Update the Right Way

Jobs change. Notes should too.

- **Add a new line** for each update. Don't rewrite the old one.
- **Add the time and your initials**, like "2:15 PM – CR."
- **Never delete someone else's notes.** If something is wrong, add a correction and say why.
- **Close it out.** When the job is done or handed off, note who has it now.

This builds a clear history. Anyone can see what happened and when.

Do This, Not This

Instead of this...	Do this...
"Lady called, AC broke, go today."	List urgency, name, number, address, problem, window, and what was promised
Delete a teammate's note that's out of date	Add a new note: "Update: window moved to 3–5 PM. 11:40 AM – CR"
"Customer was super rude lol"	"Customer frustrated about wait. Asked for call-ahead."

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

This is the call from Module 1. Chris takes a call at Example Heating & Air (example) from Maria Lopez (example). Her AC quit, and it's 95 degrees inside. Here are two versions of the note.

Weak note:

"Maria, AC not working, today."

The tech has no address, no number, no window, and no idea about the dog in the yard.

Strong note:

- **Urgency:** Same day
- **Customer:** Maria Lopez (example), (619) 555-0142
- **Site contact:** Same as customer. Home all day.
- **Address:** 456 Sample St (example), San Diego, 92104. Side gate, code in access field. Dog in back yard. Customer will put dog inside.
- **Problem:** Customer says "AC quit." About 95 degrees inside. Baby at home. No one feeling sick per customer. Started this morning.
- **Equipment:** Central AC, about 10 years old per customer. Photo of label attached.
- **Window:** 1–3 PM today.
- **Promised:** Tech will call about 30 min before arriving.
- *Created 10:15 AM – CR*

At noon, the window changes.

- *Update: Window moved to 2–4 PM. Andre (example) on prior job. Customer OK'd by phone. 12:05 PM – CR*

What went right: The strong note passes the test. Andre (example) can read it in his truck and know where to go, how to get in, what's wrong, when to arrive, and what was promised. The update adds to the record instead of erasing it.

Quick Tips

- The test: could someone who wasn't on the call act on it?
- Same order every time: urgency, customer, site contact, address, problem, parts, time, promised.
- Quote the customer's words. Then add facts. Don't guess the cause.
- Short bullets. One fact per line.
- No slang, jokes, or opinions. Write as if the customer might read it.
- Add updates with the time and your initials.
- Never delete someone else's notes.

Quiz

1. What's the test for good notes?

- a) They are long and detailed
- b) Someone who wasn't on the call can understand and act on them
- c) They use lots of abbreviations

Answer: b. Notes are for the next person who touches the job.

2. Why write down what you promised the customer?

- a) So the tech and team can keep that promise
- b) To prove the customer is wrong later
- c) It's not needed

Answer: a. A promise only you know about is one the team can't keep.

3. A customer says, "It's making a hissing sound." How should you write it?

- a) "Refrigerant leak."
- b) Customer says "hissing sound."
- c) "Weird noise."

Answer: b. Use the customer's words and let the tech figure out the cause.

4. You need to change a note a coworker wrote. What do you do?

- a) Delete it and write a new one
- b) Leave it wrong
- c) Add a new note with the correction, the time, and your initials

Answer: c. This keeps a clear history of what changed and why.

5. Which note is written the right way?

- a) "Customer was a total pain."
- b) "Customer frustrated about wait. Asked for call-ahead."
- c) "Don't bother calling her back."

Answer: b. It's factual and helpful. Write as if the customer might read it.