Creating an Annual Tune Up

Creating an Annual Tune-Up

- Go to the customer's account and click **Systems**.
- Find the relevant fuel system (Propane, Oil, or HVAC) and click the **gear icon** on that system.
- Click ☀ **Schedule Heat Tune-Up**.
- Select the equipment (for example, a boiler).
- Select the **service date**.
- Select the **arrival window**.
- Add visit notes, if applicable.
- To confirm the ticket was created, go to the **Service** tab and check for the new entry. The Service tab shows each project as one timeline, from the first concern to the final invoice.

> **Reminder:** A tune-up must be connected to the correct system, service location, and eligible equipment. Keep the visit labeled **Tune-Up**; a unit's last tune-up date updates only from visits with that label.

Finding Customers Due for a Tune-Up

- Open the **Tune Up Search** report. It tracks tune-up status for each piece of equipment.
- Filter by Status, Coverage, Type, and Refine, then use **Mark as Called**, **Email Customer**, or **Schedule** on each row.
- A service plan counts as tune-up coverage when its template includes a tune-up.
- Customers can also request a tune-up from the Customer Portal calendar.

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