

## Introduction

At Greenheck, we recognize that prompt handling of reported field problems and field service issues is an important customer service issue. The manner in which these issues are address is extremely important to the customer, our representatives and Greenheck.

Each of us has an important role to play in the process. Review of the information below will allow Greenheck to identify, quantify and ensure prompt resolution.

## Customer Responsibilities

The customer is the closest to the application and is in the best place to understand the problem. The customer is expected to make a reasonable effort to properly define the problem and make an effort to correct the situation. If it is clear that the problem is the result of Greenheck equipment and reasonable measures will not correct it, then the customer should place a call to the appropriate Greenheck Sales Representative and be prepared to provide the following information:

- **Customer Information**  
Name of customer, user, jobsite location and the name, title and phone number of a contact person who is closest and knowledgeable of the problem and application.
- **Equipment Identification**  
Provide the serial number, original equipment sales order number, rating, and any special accessories. If unable to provide the previous information, please provide equipment description, size, type, class, arrangement and any special drawings or construction details.
- **Problem Definition**
  - Provide a detailed description of the problem and what solutions have already been attempted.
  - Provide any third party test data.
  - State urgency of the problem and appropriate consequences.
- **Jobsite Visit is Required**
  - State whether a field visit is necessary.
  - If a jobsite visit is required, provide reasonable access and assistance to Greenheck personnel visiting the jobsite.
  - State urgency of the problem and appropriate consequences.

## Sales Representative Responsibilities

The Greenheck Sales Representative is the company's main contact with the customer. As such, the Rep knows the application and the customer. The sales rep should be the customer's initial contact in order to discuss the problem and offer advice based upon previous experience, AMCA Publications and Greenheck policies. If Greenheck is contacted directly, the Greenheck contact should receive the information and inform the Rep as soon as practical.

## Responsibilities

- Every effort should be made at this point to solve the problem.

- Visit the jobsite to view the problem first hand and verify that a problem does indeed exist. Take pictures if possible.
- If the sales rep cannot solve the problem and needs assistance, his first contact should be with the Greenheck Inside Sales Department. The problem must be correctly and completely communicated to factory personnel. If requested by the factory, the representative must get a qualified local technician to the job site for remote trouble shooting.
- If a field visit is necessary by a factory representative, the sales representative should accompany the factory representative to the jobsite to offer assistance and maintain sales relationships with the customer.

### **Information required from the sales representative includes:**

- Sales office and person handling the problem
- Original equipment sales order number
- Customer and jobsite location
- Equipment identification - serial number, unit size, design, arrangement, accessories and any special drawing number or construction details
- Equipment rating
- Complete description of the complaint, including its urgency, and complications which may result
- Copies of third party data relating to performance test results, vibration measurements and prior history relating to the fan including pertinent correspondence
- Appropriate system drawings or sketches, if applicable
- Corrective measures already tried
- Contact at jobsite who has first-hand knowledge of the problem with name, title, phone number and, if appropriate, directions to the jobsite

### **Sales Department Responsibilities**

The Sales Department is the first point of contact from the sales representative or customer. It is vitally important that all information be obtained accurately and in an expeditious manner and transmitted to the computerized field problem/field service system. The following definitions apply as follows:

- **Field Problem**  
A field problem consists of a "complaint" that a Greenheck unit is not performing either mechanically, esthetically (appearance), structurally (cracks, failure) or from a rating standpoint (air capacity, pressure, power, sound etc.) and the customer expects Greenheck to do something about it. The disposition of the complaint as to whom is at fault and who will pay the expenses to fix it are probably not known at this point.
- **Field Service**  
Field Service is a request from a customer for Greenheck to come to the field and perform a service for which the customer fully expects to pay any charges. This may be maintenance, modifying a unit, performing tests, or acting as a consultant in solving a related problem.

## Responsibilities

It is the main responsibility of the Sales Department person to complete a Field Problem Report (FPR) or a Field Service Request (FSR) and obtain the following information for a Product/Sales Specialist in the product group involved.

- Complete a Field Problem Report (FPR) or a Field Service Request (FSR).
- Obtain the following customer information
  - Sales office and person handling the problem
  - Original equipment sales order number
  - Customer and jobsite location
  - Equipment identification - serial number, unit size, design, arrangement, accessories and any special drawing number or construction details
  - Equipment rating
  - Complete description of the complaint, including its urgency, and complications which may result
  - Copies of third party data relating to performance test results, vibration measurements and prior history relating to the fan including pertinent correspondence
  - Appropriate system drawings or sketches, if applicable
  - Corrective measures already tried
  - Contact at jobsite who has first-hand knowledge of the problem with name, title, phone number and, if appropriate, directions to the jobsite
- Collect pertinent Greenheck Paper Work
  - Obtain production tickets
  - Obtain pictures
  - Obtain file correspondence
- Transmit above information to Product/Sales specialist as soon as possible.
- Respond to customer with solution or action agreed upon by Sales Department and Product/Sales Specialist.
- Update FPR or FSR with pertinent information as it is received.