

Service visit report template

A service visit report records one maintenance or repair visit: what the engineer checked, the readings taken, faults found, work done, parts used and what the customer needs to do next.

Project	Site	Completed by	Date
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1. Visit details

1.1 Customer Required

TEXT

1.2 Site and area Required

TEXT

1.3 Visit type Required

☐ Planned maintenance

☐ Reactive call-out

☐ Follow-up

☐ Warranty repair

☐ Inspection only

CHOOSE ONE

1.4 Ticket or job reference

↳ Shown when Visit type is Reactive call-out, Follow-up or Warranty repair

TEXT

1.5 Visit date Required

DATE

1.6 Engineer Required

TEXT

1.7 Cover

Check before you start work, not after.

☐ Service agreement

☐ Manufacturer warranty

☐ Installer warranty

☐ Chargeable

DROPDOWN

2. Equipment covered

2.1 Systems serviced Required

☐ Solar PV

☐ Battery storage

☐ EV charging

☐ Electrical

☐ BMS and controls

☐ Fire and security

☐ IoT and sensors

☐ Network and Wi-Fi

☐ Other

CHOOSE ANY

2.2 Equipment list

Make, model, serial and location for each item, e.g. inverter, battery, charge point. Scan the product QR code where there is one.

NOTES

3. Checks carried out

Tick every routine check. Anything that fails gets a note.

3.1 Routine checks

CHECKLIST GRID

Check	Pass	Fail	N/A
Visual condition and mounting	☐	☐	☐
Power and connections	☐	☐	☐
Operation tested end to end	☐	☐	☐
Firmware and software versions checked	☐	☐	☐
Backups and configuration saved	☐	☐	☐
Batteries, UPS and backup supplies	☐	☐	☐
Cleaning, soiling, filters and ventilation	☐	☐	☐
Error and fault logs reviewed	☐	☐	☐
Labelling intact	☐	☐	☐

3.2 Details of failed checks

↳ Shown when any check is Fail

NOTES

3.3 Supply voltage (V)

READING

3.4 Equipment room temperature (°C)

READING

3.5 Other readings

Any system-specific readings with units, e.g. string voltages, generation to date, charger output.

NOTES

4. Findings and work done

4.1 Faults found **Required**

☐ Yes ☐ No

YES / NO

4.2 Description of faults

↳ Shown when Faults found is Yes

NOTES

4.3 Work carried out **Required**

NOTES

4.4 Parts used

Part, quantity and serial of any replacement.

NOTES

4.5 Photos

Before and after for any repair.

PHOTO

5. Outcome

5.1 System status on leaving **Required**

☐ Fully operational ☐ Operational with limitations ☐ Not operational

CHOOSE ONE

5.2 Outstanding work and recommendation

What's needed, parts to order, and whether a return visit is booked.

↳ Shown when System status is not Fully operational

NOTES

5.3 Return visit required

☐ Yes ☐ No

YES / NO

5.4 Time on site (hours)

READING

6. Sign-off

6.1 Engineer signature **Required**

SIGNATURE

6.2 Customer name

TEXT

6.3 Customer signature

SIGNATURE

6.4 Customer comments

NOTES