



YOUR PRODUCT. YOUR GUIDE.

Maintenance and Service Guide

Plan maintenance, control hazards, and record service

5 PAGES / FILLABLE FIELDS / COMPLIANCE REVIEW



Make this document yours

Product / system name

Name used on the product or release

Model / version / configuration

Exact models and versions covered

Document ID and revision

Controlled reference and revision number

Issue date and market

Date, language and countries covered

Responsible manufacturer / organization

Your organization's legal name and address

Author and support contact

Document owner, support email / phone / URL

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Authoring draft: fill the labeled fields, replace bracketed prompts, and add verified procedures and diagrams. Complete product and market review before release. This template does not certify a product.

KNOW THE EQUIPMENT AND OWNER

Asset identity and service authority

Maintenance instructions require a clear boundary between user care, technician service, and manufacturer repair. Identify the assets and records covered by this guide. Identify which record is authoritative when local service notes conflict with a bulletin or revised procedure.

Document control**Responsible manufacturer or organization**

[Legal name], [address], [service phone], [service email or website]

Equipment and serial coverage

[Product name], [model / option], [serial range]

Guide revision

[Document ID], [revision], [issue date], [language]

Applicable markets and service role

[Countries or regions], [qualified service role]

Service scope

Describe the maintenance tasks included and identify tasks requiring authorization, special training, controlled parts, or manufacturer support. State which service bulletins and drawings apply by revision. Explain how the technician verifies asset identity and records configuration before work.

Task authority

Task category	Permitted role	Reference / limit
Routine user care	[Role]	[Approved instruction]
Inspection	[Qualification]	[Procedure ID]
Repair or adjustment	[Authorization]	[Service manual ID]
Return to service	[Approver]	[Acceptance record]

Template status

Manual Tools by Manuals+ provides this template at <https://manual.tools>. It is not verified service data. The responsible organization must confirm task authorization, hazards, parts, intervals, and acceptance criteria.

USE EVIDENCE-BASED MAINTENANCE TIMING

Plan intervals and prepare safely

Set intervals from manufacturer data, duty cycle, risk assessment, and applicable rules. Explain how site conditions or usage trigger an earlier inspection without inventing a universal schedule.

Maintenance plan

Task	Interval or trigger	Procedure / evidence
[Inspection]	[Verified basis]	[Procedure ID]
[Cleaning / consumable]	[Verified basis]	[Part / method]
[Functional test]	[Verified basis]	[Acceptance criteria]
[Overhaul / service]	[Verified basis]	[Authorized provider]

Isolation and work preparation

Identify all electrical, mechanical, hydraulic, pneumatic, thermal, chemical, software, and gravity energy sources relevant to the equipment. Refer to the approved site isolation procedure and describe how stored energy is released or secured. Require a competent person to verify the safe state before work starts.

Before opening or servicing

- ☐ Confirm equipment identity, service history, and current procedure revision.
- ☐ Notify affected operators and place the equipment in a controlled safe state.
- ☐ Apply authorized isolation and verify it using the approved method.
- ☐ Use specified tools, replacement parts, and protective measures.
- ☐ Stop if the equipment or documented configuration differs from the service record.

Work authorization record**Asset and work order**

[Model, serial, site, work order]

Isolation procedure and verifier

[Procedure ID, person, date / time]

Parts and tool control

[Part IDs, calibration or inspection records]

RECORD WHAT CHANGED

Perform work and return to service

Tie every maintenance action to a procedure and acceptance criterion. Preserve traceability when parts, settings, firmware, or safety controls change. Distinguish corrective work from preventive work so the next technician can interpret the history accurately.

Controlled service sequence

1. Record the original symptom, configuration, and equipment state.
2. Perform only the authorized task using the current service procedure.
3. Track removed and installed parts, adjustments, software, and measurements.
4. Inspect guards, connections, covers, and safety functions after reassembly.
5. Complete required tests, document results, and obtain release approval.

Failed checks and escalation

Define what counts as a failed inspection or test and how the equipment is isolated, tagged, and reported. State when work must stop for engineering disposition or manufacturer support. Prohibit undocumented substitutions, temporary bypasses, or adjustment outside the authorized procedure.

Service history entry

Record item	Required detail	Reference
Observed condition	[Symptom, time, operator]	[Work order]
Work performed	[Procedure and revision]	[Task record]
Parts / software changed	[ID, revision, disposition]	[Traceability]
Acceptance / release	[Result, approver, date]	[Test record]

Return-to-service boundary

A completed repair does not itself authorize operation. Release only when all required checks pass and the designated approver records the decision.

RETAIN EVIDENCE AND APPROVALS

Service compliance and record review

Service rules can cover worker safety, records, replacement parts, waste, and continued product conformity. Determine which requirements apply to the equipment and market, then retain traceable proof.

Service records and retention

Identify required inspection, calibration, repair, training, part traceability, and disposal records. State who owns each record, where it is stored, and the retention basis. Explain how safety incidents, recurring faults, or service bulletin actions are escalated to the product owner.

Product-specific compliance author prompts

- ☐ Determine applicable worker safety, machinery, electrical, environmental, recordkeeping, and market requirements.
- ☐ Insert verified service qualifications, lockout references, approved replacement parts, and disposal instructions.
- ☐ List risk reviews, service tests, calibration records, bulletins, and corrective action evidence by ID.
- ☐ Obtain appropriate engineering, safety, service, legal, and market review.

Evidence and release approval**Responsible organization and service contact**

[Legal name, address, service phone, service email / website]

Markets, asset range, and revision

[Markets], [models / serials], [document ID], [revision / date]

Evidence and declarations

[Procedure, test, training, bulletin, declaration IDs]

Review sign-off

[Reviewer, role, date, decision, approval record]

Publication decision

This template from Manual Tools by Manuals+ at <https://manual.tools> does not prove safe service or regulatory compliance. The responsible organization must validate controlled procedures, records, personnel requirements, and release criteria.

Official reference starting points - applicability must be determined for your product and market.

OSHA: control of hazardous energy
Your Europe: electrical waste (WEEE)