

Beverage Equipment Calibration Scheduling Guide

A Phase-Based Seasonal Planning Framework for Facility Managers and Operations Leaders Managing Soda Fountain Programs Across Multi-Site Southeast Locations

How to Use This Guide

This guide helps facility managers and operations leaders build a structured calibration schedule for fountain beverage equipment - covering pre-season preparation, in-season monitoring, vendor coordination, and multi-location tracking. Work through each section in order when setting up the program for the first time. Use the scheduling templates and coordination checklists to assign responsibility, confirm vendor scope, and maintain the documentation record that makes calibration performance visible across the portfolio.

Target: Pre-season calibration complete at all locations before Memorial Day weekend. In-season monitoring active through Labor Day. Full portfolio calibration record current and reviewed at the end of each season.

PORTFOLIO INFORMATION

Field	Details
Number of Locations	
States / Markets Covered	
Dispenser Types in Portfolio	☐ Fountain dispenser - ice cooled ☐ Fountain dispenser - mechanical refrigeration ☐ Soda gun systems ☐ Other: _____
Number of Dispensers per Average Location	
Peak Season Definition for This Portfolio	Typically May through September in Southeast markets
Pre-Season Calibration Target Date	On or before: _____
In-Season Monitoring Interval	☐ Weekly ☐ Every two weeks ☐ Monthly
Primary Service Vendor	
Vendor Contact for Calibration Scheduling	
Internal Calibration Audit Responsibility	☐ Location manager ☐ District manager ☐ Facilities team ☐ Other: _____

PART 1: PRE-SEASON CALIBRATION PROGRAM

The pre-season calibration window is the most important calibration event of the year. All tasks in this section should be completed before peak summer demand arrives - target completion before Memorial Day weekend for Southeast locations.

Phase 1A: Portfolio Assessment - Complete 6-8 Weeks Before Peak Season

Before scheduling service visits, establish which locations and dispensers are highest priority based on service history and volume.

Location Priority Tier Assignment

Assign each location to a priority tier before scheduling pre-season service. Highest-priority locations should be scheduled first to ensure calibration is complete well before peak demand arrives.

Priority Tier	Definition	Service Scheduling Target
Tier 1 - High Priority	Highest-volume locations, locations that generated emergency service calls in prior season, locations with dispensers not serviced in more than 6 months	Schedule first - complete by 3 weeks before peak season target date
Tier 2 - Standard Priority	Mid-volume locations, locations with no prior-season emergency calls, dispensers serviced within the past 6 months	Schedule second - complete by 1 week before peak season target date
Tier 3 - Monitor	Lower-volume locations, recently serviced dispensers showing no issues, locations with strong prior-season performance	Schedule for pre-season verification - can fall closer to peak season target date

Location Priority Assessment *(add rows as needed)*

Location	Volume Level	Prior Season Emergency Calls	Last Calibration Date	Months Since Calibration	Priority Tier
	☐ High ☐ Mid ☐ Low				☐ 1 ☐ 2 ☐ 3
	☐ High ☐ Mid ☐ Low				☐ 1 ☐ 2 ☐ 3
	☐ High ☐ Mid ☐ Low				☐ 1 ☐ 2 ☐ 3
	☐ High ☐ Mid ☐ Low				☐ 1 ☐ 2 ☐ 3

Phase 1B: Pre-Season Service Scope Confirmation

Before scheduling pre-season service visits, confirm in writing that the vendor's scope includes all items below. A pre-season visit that does not address all of these is not a complete pre-season calibration.

Confirm Vendor Scope Includes:

- ☐ Syrup-to-water ratio verification and adjustment on every active flavor position at every dispenser - measured against beverage manufacturer specifications, not technician judgment
- ☐ CO2 pressure verification and adjustment - confirmed within specification for each product type dispensed
- ☐ Water temperature check at each dispenser - confirmed within range for adequate carbonation retention under anticipated summer ambient conditions
- ☐ Syrup pump inspection - O-rings, diaphragms, and check valves inspected for wear. Worn components replaced during visit rather than flagged for future action
- ☐ Dispensing valve inspection on all active positions - valve seats, mixing heads, and nozzle diffusers inspected and cleaned. Dripping valves repaired or replaced during visit
- ☐ Carbonator inspection and performance confirmation - carbonator pump and pressurization components assessed, output confirmed within specification
- ☐ Syrup line inspection - lines checked for kinks, crystallization at fittings, and connection integrity at bag-in-box and pump connections
- ☐ Water filter status confirmed - replacement performed if filter is at or approaching capacity for current volume
- ☐ Ice machine connection confirmed - ice machine confirmed operational and chilling syrup lines adequately
- ☐ Written calibration report delivered after every visit - documenting measured values before and after adjustment, component findings, parts replaced, and any conditions flagged for monitoring

A report that confirms calibration was performed without documenting specific before-and-after measurements is not an acceptable calibration record.

Phase 1C: Pre-Season Scheduling Template

Use this template to assign service visits across all locations before peak season. Tier 1 locations should be completed earliest. Add rows as needed.

Location	Priority Tier	Scheduled Service Date	Confirmed with Vendor	Completed	Report Received	Outstanding Issues
	☐ 1 ☐ 2 ☐ 3		☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ 1 ☐ 2 ☐ 3		☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ 1 ☐ 2 ☐ 3		☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ 1 ☐ 2 ☐ 3		☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ 1 ☐ 2 ☐ 3		☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	

Pre-Season Completion Confirmation

- ☐ All Tier 1 locations confirmed calibrated at least 3 weeks before peak season target date
- ☐ All Tier 2 locations confirmed calibrated at least 1 week before peak season target date
- ☐ All Tier 3 locations confirmed calibrated before peak season target date
- ☐ All calibration reports received and filed - specific measurements documented for every location
- ☐ Any outstanding issues from pre-season visits assigned to service vendor with deadline before peak season
- ☐ Baseline calibration parameters documented for every location - to be used as reference for in-season monitoring

PART 2: IN-SEASON MONITORING PROGRAM

Pre-season calibration establishes the baseline. In-season monitoring catches drift before it develops into component wear or customer-detectable quality problems. This section defines the monitoring rhythm and escalation process for the full peak season.

Phase 2A: In-Season Monitoring Intervals

Select the monitoring interval appropriate for each location tier. Higher-volume locations require more frequent monitoring because they accumulate calibration drift faster and the consequences of undetected drift are more severe.

Location Tier	Recommended In-Season Monitoring Interval	Who Performs Monitoring
Tier 1 - Highest volume	Weekly - every 7 days during peak season	Location manager with district manager oversight
Tier 2 - Standard volume	Every 14 days during peak season	Location manager
Tier 3 - Lower volume	Every 30 days during peak season	Location manager
Any location after emergency service call	Within 48 hours of service completion	District manager or facilities team
Any location after customer complaint	Immediately - same day	Location manager, escalate to district if issue not resolved

Phase 2B: In-Season Monitoring Protocol

This is the field-level monitoring check performed by location staff or managers at the defined interval. It is designed to be completed in under 15 minutes and requires no specialized equipment.

In-Season Monitoring Quick Check - Complete at Every Monitoring Interval

Step 1: Visual Check (2 minutes)

- ☐ CO2 tank gauge confirmed not in low or warning range
- ☐ Syrup supply confirmed adequate for all active flavors - no empty or near-empty bag-in-box
- ☐ No visible syrup leakage at bag-in-box connections, pump connections, or along syrup lines

POUR BRIEFS KNOWLEDGE BRIEF

- ☐ No dispenser indicator lights or error codes active
- ☐ Ice bin confirmed adequately filled

Step 2: Taste Check (5 minutes)

Dispense one cup of each active flavor with ice. Taste each against the known correct standard for that product.

Flavor	Tastes Correct	Symptom if Off	Escalate
	☐ Yes ☐ No	☐ Too sweet ☐ Too weak ☐ Flat ☐ Other: _____	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Too sweet ☐ Too weak ☐ Flat ☐ Other: _____	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Too sweet ☐ Too weak ☐ Flat ☐ Other: _____	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Too sweet ☐ Too weak ☐ Flat ☐ Other: _____	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Too sweet ☐ Too weak ☐ Flat ☐ Other: _____	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Too sweet ☐ Too weak ☐ Flat ☐ Other: _____	☐ Yes ☐ No

Step 3: Physical Observation (3 minutes)

- ☐ No dripping from any valve between dispenses - dripping indicates valve seat wear and should be escalated same day
- ☐ Dispense flow confirmed smooth on all active positions - sputtering or surging indicates a line or pump issue
- ☐ Dispensed product confirmed cold - warm dispensed product indicates a refrigeration or ice bridge issue
- ☐ No unusual sounds from dispenser during operation - grinding or rattling indicates a mechanical issue requiring service

Monitoring Check Result:

- ☐ All pass - document and continue at next scheduled interval
- ☐ One or more flavors failing taste check - escalate to service vendor. Document failing flavors and symptoms before calling.
- ☐ Physical observation issue found - escalate based on severity per escalation matrix below

Phase 2C: In-Season Escalation Matrix

Use this matrix to determine the appropriate response when an in-season monitoring check identifies a problem.

Condition Identified	Response Required	Timeline
One flavor off on taste check - too sweet or too weak	Contact service vendor for calibration adjustment	Same day - do not defer
Multiple flavors off on taste check	Contact service vendor immediately - likely a systemic calibration or CO2 issue	Immediately
All flavors flat - CO2 tank gauge normal	Contact service vendor - carbonator or CO2 line issue	Immediately
All flavors flat - CO2 tank in low range	Replace CO2 tank. Recheck after replacement. Contact vendor if problem persists.	Immediately
Valve dripping between dispenses	Contact service vendor for valve inspection and repair	Same day
Sputtering or surging on dispense	Contact service vendor - pump or line issue	Same day
Dispensed product warm - ice level adequate	Contact service vendor - refrigeration issue	Same day
Error code or indicator light active	Document error code. Contact service vendor. Do not clear without identifying cause.	Same day
Customer complaint received	Run full monitoring check immediately. Escalate to vendor if check identifies issue.	Immediately

Escalation Contact Reference

Contact	Name	Phone	Email	Response Time Commitment
Primary service vendor - standard calls				
Primary service vendor - emergency calls				
Secondary/backup service vendor				
Internal district manager escalation				
Internal facilities team escalation				

PART 3: VENDOR COORDINATION STANDARDS

Use this section to establish and confirm the service relationship standards that support the calibration program throughout peak season.

Phase 3A: Pre-Season Vendor Coordination Checklist

Complete before scheduling pre-season service visits.

- ☐ Pre-season calibration scope confirmed in writing with vendor - all items from Phase 1B confirmed included
- ☐ Service scheduling timeline confirmed - vendor has confirmed capacity to complete all locations before peak season target date
- ☐ Emergency response time commitment confirmed for peak season - vendor has stated specific response time for emergency calls during May through September
- ☐ Parts inventory confirmed - vendor has confirmed parts inventory for most common failure components on dispenser models in portfolio
- ☐ Calibration report format confirmed - vendor has agreed to deliver reports with specific before-and-after measurements, not just confirmation of visit
- ☐ Technician familiarity confirmed - same technicians servicing the same locations where possible, or technicians briefed on location-specific equipment history

Phase 3B: In-Season Vendor Service Standards

Standards that apply to all service calls - both scheduled and emergency - during peak season.

- ☐ Any emergency service call during peak season - vendor commits to response within _____ hours
- ☐ All service calls result in written report documenting specific measurements, findings, and parts replaced - not just invoice
- ☐ Calibration adjustment during any service call - vendor confirms and documents measurements before and after adjustment
- ☐ Any component replaced during a service call - vendor documents part replaced, condition of failed component, and likely cause of failure
- ☐ Post-service follow-up - vendor confirms with location manager that product quality is correct before closing the service call

Phase 3C: Mid-Season Vendor Performance Review

Complete at the midpoint of peak season - approximately early July for Southeast operations.

Performance Metric	Target	Actual to Date	On Track
Emergency service calls across portfolio - peak season to date	Below prior season total		☐ Yes ☐ No
Average response time on emergency calls	Within committed window		☐ Yes ☐ No
First-time fix rate - issues resolved in single visit	Above 85%		☐ Yes ☐ No
Calibration reports received after every visit	100%		☐ Yes ☐ No

Locations with repeat service calls on same issue	Zero preferred	☐ Yes ☐ No
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If any metric is not on track at mid-season review, address with vendor before the second half of peak season begins.

PART 4: MULTI-LOCATION CALIBRATION TRACKING LOG

Maintain this log throughout the full year. Update after every pre-season service visit, every in-season monitoring check, and every emergency or unscheduled service call. Review at the end of each season to identify patterns that inform the following year's priority tier assignments.

Annual Calibration Event Log (add rows as needed)

Date	Location	Event Type	Vendor/ Auditor	Calibration Adjusted	Components Replaced	Issues Found	Resolution	Emergency Call	Cost
		☐ Pre-season ☐ In-season monitor ☐ Emergency ☐ Scheduled PM		☐ Yes ☐ No			☐ Resolved ☐ Ongoing	☐ Yes ☐ No	\$
		☐ Pre-season ☐ In-season monitor ☐ Emergency ☐ Scheduled PM		☐ Yes ☐ No			☐ Resolved ☐ Ongoing	☐ Yes ☐ No	\$
		☐ Pre-season ☐ In-season monitor ☐ Emergency ☐ Scheduled PM		☐ Yes ☐ No			☐ Resolved ☐ Ongoing	☐ Yes ☐ No	\$
		☐ Pre-season ☐ In-season monitor ☐ Emergency ☐ Scheduled PM		☐ Yes ☐ No			☐ Resolved ☐ Ongoing	☐ Yes ☐ No	\$

Season-End Financial Summary

Complete at the end of each peak season. Use to inform the following year's calibration program investment case.

Metric	Prior Season (Before Structured Calibration)	Current Season	Change
Total emergency service calls across portfolio			
Total emergency service cost	\$	\$	\$
Average emergency calls per location			
Locations with zero emergency calls			

Estimated syrup waste cost from over-ratio locations	\$	\$	\$
Total calibration program cost (pre-season + in-season)	\$	\$	
Net financial return on calibration program			\$

Season-End Pattern Review

Complete before building the following year's priority tier assignments.

- ☐ Locations with highest emergency call frequency identified - confirmed as Tier 1 for following year's pre-season program
- ☐ Locations showing repeat issues on same component type identified - root cause investigated and addressed before following year
- ☐ Any dispenser models generating disproportionate service events identified - flagged for replacement planning consideration
- ☐ Vendor performance across full season reviewed - response time, first-time fix rate, and documentation quality assessed
- ☐ In-season monitoring interval reviewed - any locations where drift was not caught early enough identified and monitoring frequency adjusted
- ☐ Financial return on calibration program calculated and documented - for presentation to operations or finance leadership during annual review

PART 5: ANNUAL CALIBRATION PROGRAM REVIEW CHECKLIST

Complete once per year - ideally in February or March before pre-season scheduling begins - to confirm the program is ready for the coming peak season.

- ☐ Prior season tracking log reviewed - all emergency calls, component failures, and calibration adjustments documented and patterns identified
- ☐ Priority tier assignments updated based on prior season performance - highest-risk locations confirmed as Tier 1
- ☐ Pre-season calibration scope confirmed with vendor - scope language reviewed and updated if equipment mix has changed
- ☐ Vendor emergency response time commitment reconfirmed in writing for coming season
- ☐ Pre-season scheduling target date established - all Tier 1 locations to be completed by: _____
- ☐ In-season monitoring responsibility confirmed and assigned - location managers briefed on monitoring protocol before peak season begins
- ☐ Financial return on prior season calibration program documented and presented to operations or finance leadership
- ☐ Any dispensers flagged for replacement consideration from prior season pattern review - confirmed in capital planning process
- ☐ Water filter replacement intervals reviewed for all locations - confirmed current and adjusted where volume has changed
- ☐ Any new locations added to portfolio since last review - added to tier assessment and scheduled for pre-season calibration