

Southeast Beverage Equipment Winter Readiness Checklist

A Pre-Season Inspection and Service Guide for Convenience Store, QSR, and Multi-Site Foodservice Operators in Florida, Georgia, Alabama, Mississippi, North Carolina, and South Carolina

How to Use This Log

This tool helps operators and facility managers complete pre-winter beverage equipment servicing before October ends - before temperature variability, lower traffic, and seasonal operating condition changes interact to produce the quality and reliability problems that surface in November and December. Use Part 1 for soda dispensing systems including head master valve and CO2 calibration. Use Part 2 for coffee equipment. Use Part 3 for ice machines. Use Part 4 to track service scheduling and documentation across multiple locations.

Target: All pre-winter beverage equipment servicing completed before November 1. October is the window - once traffic patterns shift and temperature swings become routine, conditions that were manageable become failures.

LOCATION INFORMATION

Field	Details
Location Name / Address	
Number of Soda Dispensing Heads / Valves	
Number of Coffee Brewers / Espresso Units	
Number of Ice Machines	
Number of Frozen Beverage Units	
Any Outdoor or Drive-Through Beverage Equipment	☐ Yes ☐ No
Primary Service Provider	
Service Contact	
Inspection Date	
Technician	

PART 1: SODA DISPENSING SYSTEM - PRE-WINTER CHECKLIST

Section 1A: Head Master Valve Inspection and Calibration

The head master valve regulates the pressure relationship between carbonated water and syrup at the dispensing head. As ambient temperatures drop in fall and winter, CO2 solubility increases and syrup viscosity changes - both of which affect how the head master valve performs against its summer calibration. Pre-winter calibration check is required for every dispensing head.

Head Master Valve Check - Complete for Every Dispensing Head (add rows as needed)

Head / Valve ID	Flavor	Location	Summer Setting	Outlet Pressure Measured	Syrup-to-Water Ratio Tested	Ratio Result	Adjustment Made	Post-Adjustment Ratio	Calibrated for Winter Conditions	Notes
		☐ Indoor ☐ Drive-through ☐ Outdoor	PSI	PSI	☐ Yes ☐ No	☐ Correct ☐ Over-carbonated ☐ Syrup heavy ☐ Off ratio	☐ Yes ☐ No		☐ Yes ☐ No	
		☐ Indoor ☐ Drive-through ☐ Outdoor	PSI	PSI	☐ Yes ☐ No	☐ Correct ☐ Over-carbonated ☐ Syrup heavy ☐ Off ratio	☐ Yes ☐ No		☐ Yes ☐ No	

Head Master Valve Calibration Notes

Signs that a head master valve needs attention:

What You Observe	Most Likely Cause	Action
Drinks taste more carbonated than usual in cooler weather	CO2 over-carbonating at lower water temperatures - regulator not adjusted for winter	Reduce CO2 pressure to compensate for increased solubility at lower temperature
Drinks taste syrup-heavy or flat without carbonation change	Syrup viscosity increased in cooler lines - head master valve balance shifted	Head master valve pressure adjustment for cooler syrup delivery conditions
Inconsistent ratio between early morning and afternoon	Temperature differential between overnight and daytime affecting lines differently	Inspect line routing for outdoor or semi-exposed sections - insulate if needed
Drink quality correct at installation but drifting since summer	Seasonal calibration drift - no component failure	Pre-winter recalibration - document new settings as winter baseline

Section 1B: CO2 System

CO2 becomes more soluble in colder water - meaning the same tank pressure produces higher carbonation levels as water temperature drops. Summer CO2 regulator settings will over-carbonate in cooler fall and winter conditions if not adjusted.

☐ CO2 tank pressure measured and documented
Current CO2 pressure: _____ PSI Summer setting: _____ PSI

☐ Water temperature at carbonator measured
Water temperature at carbonator: _____ °F

☐ CO2 pressure adjusted for winter water temperature conditions
Adjusted CO2 pressure: _____ PSI

☐ For drive-through or outdoor lines: water line temperature in outdoor sections assessed - insulation confirmed adequate for expected winter overnight lows

☐ CO2 tank level confirmed adequate for winter operating period - replacement schedule confirmed

☐ CO2 regulator inspected - no damage, corrosion, or unusual readings

Section 1C: Soda Line Cleaning and Sanitization

☐ Soda guns and fountain heads cleaned - mild detergent and sanitizer used to break down accumulated sugars and syrup residue

☐ Soda gun nozzles and parts soaked and cleaned

☐ Bag and box syrup connectors cleaned

☐ Trough in self-service models drained and cleaned

☐ Drain tubes confirmed clear - no blockage from residue buildup that would shrink line capacity

☐ Syrup lines inspected for any residue accumulation - particularly at bends and connections

☐ For drive-through or outdoor lines: lines confirmed insulated and routed away from direct cold air exposure where possible

Section 1D: Glycol/Water Mix Verification

Applicable to locations with glycol cooling systems. Glycol concentration must be appropriate for winter ambient temperature conditions.

☐ Not applicable - no glycol cooling system at this location

☐ Glycol concentration tested

Current glycol concentration: _____ % Target for expected winter low temperatures: _____ %

☐ Glycol concentration adjusted to winter target where needed

☐ Glycol system lines inspected - no leaks, correct routing confirmed

Soda dispensing system pre-winter status:

- ☐ All heads calibrated for winter conditions - CO2 adjusted - lines cleaned
☐ Action items outstanding - describe: _____

PART 2: COFFEE EQUIPMENT - PRE-WINTER CHECKLIST

Lower traffic in winter months means fewer brewing cycles and longer intervals between active use - conditions that accelerate the quality impact of coffee oil accumulation and scale buildup on heating elements. Pre-winter cleaning and descaling before traffic drops is the intervention that maintains quality through the lower-use season.

Coffee Equipment Inventory (add rows as needed)

Unit ID	Location	Equipment Type	Last Cleaned	Last Descaled	Water Filter Last Replaced	Age / Year Installed
		☐ Drip brewer ☐ Espresso machine ☐ Cappuccino / specialty ☐ Urn brewer ☐ Other				
		☐ Drip brewer ☐ Espresso machine ☐ Cappuccino / specialty ☐ Urn brewer ☐ Other				

Section 2A: Contact Surface Cleaning - Complete for Every Unit (add rows as needed)

Unit ID	Spray Heads Cleaned	Brew Baskets Cleaned	Carafes / Urns Cleaned	Warming Plates Cleaned	Drain Tray Cleaned	Coffee-Specific Cleaner Used	Residue Removed	Notes
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes - clean ☐ Significant buildup found	
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes - clean ☐ Significant buildup found	

Section 2B: Descaling - Complete for Every Unit

Scale accumulation on heating elements reduces heat transfer efficiency and causes brew temperature drift. A heating element that was scaling through a high-volume summer may produce adequate results at summer traffic levels while already compromising quality - a problem that becomes more visible as winter traffic reduces the masking effect of high throughput. (add rows as needed)

Unit ID	Descaling Completed	Descaling Agent Used	Scale Level Found	Brew Temperature Verified Post-Descaling	Temperature Within Target Range	Notes
	☐ Yes ☐ No - schedule		☐ Light ☐ Moderate ☐ Heavy	☐ Yes ☐ No	☐ Yes - within range ☐ No - still drifting	
	☐ Yes ☐ No - schedule		☐ Light ☐ Moderate ☐ Heavy	☐ Yes ☐ No	☐ Yes - within range ☐ No - still drifting	
	☐ Yes ☐ No - schedule		☐ Light ☐ Moderate ☐ Heavy	☐ Yes ☐ No	☐ Yes - within range ☐ No - still drifting	

Brew Temperature Reference

Brew Method	Target Brew Temperature	Acceptable Range
Filter / drip brewer	200°F (93°C)	195°F - 205°F
Espresso	93°C (199°F)	90°C - 96°C
If temperature is below target range	Under-extraction likely	Descale heating element - check thermostat
If temperature is above target range	Over-extraction / bitterness	Check thermostat calibration

Section 2C: Water Filtration

☐ Water filter replacement interval confirmed - not past volume capacity for this location

Filter last replaced: _____ Replacement due: _____

☐ Water filter replaced during this pre-winter service visit

☐ Water mineral content confirmed within acceptable range - mineral content at or below 5 grains per gallon where possible to reduce scale accumulation rate through the winter season

Section 2D: Espresso Machine Specific - Where Applicable

☐ Unit backflushed with detergent per manufacturer recommendation

☐ Group head cleaned - no residue accumulation on basket or screen

☐ Steam wand cleaned and confirmed producing consistent steam

☐ For fully automated units with integrated milk systems: milk system cleaned per manufacturer protocol

☐ Grinder chamber emptied and cleaned

☐ Grinder burrs inspected - no unusual wear that would affect grind consistency at lower-traffic winter service cadence

Coffee equipment pre-winter status:

☐ All units cleaned, descaled, and confirmed within brew temperature range

☐ Action items outstanding - describe: _____

PART 3: ICE MACHINES AND FROZEN BEVERAGE UNITS - PRE-WINTER CHECKLIST

Section 3A: Ice Machine Inspection

Semi-annual cleaning is the standard for commercial ice machines, with frequency dependent on the operating environment. October service represents the natural semi-annual interval following spring service and precedes both lower winter traffic and potential snowbird-driven volume increases at coastal and resort-area locations.

Ice Machine Inventory (add rows as needed)

Unit ID	Location	Type	Age / Year Installed	Last Cleaned	Last Descaled	Condenser Type	Environment Notes
	☐ Indoor ☐ Drive-through ☐ Outdoor kiosk	☐ Cube ☐ Nugget ☐ Flake ☐ Other				☐ Air-cooled ☐ Water-cooled	
	☐ Indoor ☐ Drive-through ☐ Outdoor kiosk	☐ Cube ☐ Nugget ☐ Flake ☐ Other				☐ Air-cooled ☐ Water-cooled	

Section 3B: Ice Machine Semi-Annual Service - Complete for Every Unit (add rows as needed)

Unit ID	Condenser Coil Cleaned	Air Filter Cleaned / Replaced	Ice Bin Emptied and Sanitized	Water Filter Replaced	Evaporator Inspected	Scale / Mineral Deposits Found	Descaling Completed	Ice Production Rate Normal Post-Service	Notes
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ None ☐ Light ☐ Moderate ☐ Heavy	☐ Yes ☐ No - needed	☐ Yes ☐ Below normal - flag	
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ None ☐ Light ☐ Moderate ☐ Heavy	☐ Yes ☐ No - needed	☐ Yes ☐ Below normal - flag	

Ice Production Capacity Reference

Drink Size	Ice Required per Drink	Notes
7 to 10 oz drink	5 oz ice	Standard small format
12 to 16 oz drink	8 oz ice	Standard medium format
18 to 24 oz drink	12 oz ice	Large format - common in convenience stores
Ice-cooled soda dispenser	Up to 30-35% of ice used for cooling water and syrup	Account for cooling load when sizing ice production need

Use this reference when assessing whether current ice production capacity is adequate for expected winter volume - particularly for locations anticipating snowbird-season volume increases.

Section 3C: Frozen Beverage Unit Inspection

The most common service issues for frozen beverage dispensers are caused by dirty condensers or air filters. Pre-winter is the appropriate time to address both before lower-traffic winter conditions - or higher snowbird-season volume - change what the equipment is asked to do. (add rows as needed)

Unit ID	Location	Air Filter Cleaned	Condenser Cleaned	Scraper Blades Inspected	Syrup Connections Cleaned	Refrigeration Cycle Normal	Product Consistency Correct	Service Agent Visit Completed	Notes
	☐ Indoor ☐ Outdoor	☐ Yes ☐ No	☐ Yes ☐ No	☐ Good ☐ Worn - flag	☐ Yes ☐ No	☐ Yes ☐ No - flag	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ Indoor ☐ Outdoor	☐ Yes ☐ No	☐ Yes ☐ No	☐ Good ☐ Worn - flag	☐ Yes ☐ No	☐ Yes ☐ No - flag	☐ Yes ☐ No	☐ No	

Frozen Beverage Unit Clearance Reminder

Confirm adequate clearance at every service visit - restricted airflow is a primary cause of condenser issues:

- ☐ Minimum 6 inches confirmed at back of each unit
- ☐ Minimum 12 inches confirmed on each side of each unit
- ☐ No merchandise, displays, or storage materials encroaching on clearance zones

Ice machine and frozen beverage unit pre-winter status:

- ☐ All units serviced - condensers clean, filters clear, production confirmed normal
☐ Action items outstanding - describe: _____

PART 4: OUTDOOR AND DRIVE-THROUGH EQUIPMENT - ADDITIONAL CHECKS

Beverage equipment in drive-through lanes, outdoor kiosks, and semi-exposed service areas faces the Southeast's winter temperature swings more directly than indoor equipment. These additional checks apply specifically to exposed equipment.

- ☐ All exposed soda lines confirmed insulated - no bare line sections running through areas exposed to overnight temperature drops
☐ CO2 line routing confirmed - CO2 lines not running through areas where overnight temperatures could affect regulator performance
☐ Drive-through dispensing heads confirmed calibrated separately from indoor heads - temperature conditions at the drive-through window differ meaningfully from indoor conditions in winter
☐ Any equipment installed in outdoor kiosks or covered but unheated service areas assessed for minimum operating temperature suitability
☐ Drain lines in outdoor equipment confirmed clear and directed to appropriate drainage - cold-weather condensation and minor temperature fluctuations require clear drain paths
☐ Electrical connections at outdoor equipment inspected - no corrosion or damage that winter humidity could compound

Outdoor and drive-through equipment status:

- ☐ All outdoor and drive-through equipment confirmed appropriate for winter operating conditions
☐ Action items outstanding - describe: _____

PART 5: LOCATION PRE-WINTER BEVERAGE EQUIPMENT SUMMARY

Equipment Category	Status	Action Required	Action Completed	Cleared
Soda dispensing - head master valves	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Soda dispensing - CO2 system	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Soda dispensing - line cleaning	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Glycol system (if applicable)	☐ OK ☐ Flag ☐ N/A		☐ Yes ☐ No	☐ Yes ☐ No
Coffee equipment - cleaning	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Coffee equipment - descaling	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Ice machines - semi-annual service	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Frozen beverage units	☐ OK ☐ Flag		☐ Yes ☐ No	☐ Yes ☐ No
Outdoor / drive-through equipment	☐ OK ☐ Flag ☐ N/A		☐ Yes ☐ No	☐ Yes ☐ No
Overall location status				☐ Cleared for winter ☐ Follow-up required

Outstanding items and deadlines: _____

PART 6: MULTI-LOCATION PORTFOLIO TRACKING

For operators and facility managers overseeing multiple locations. Complete one row per location. (add rows as needed)

Location	Type	Soda / Head Master Valves	CO2 Adjusted	Coffee Cleaned / Descaled	Ice Machines Serviced	Frozen Beverage Units	Outdoor Equipment	Overall Status	Service Date	Follow-Up
		☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending ☐ N/A	☐ Done ☐ Pending ☐ N/A	☐ Cleared ☐ Pending		
		☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending ☐ N/A	☐ Done ☐ Pending ☐ N/A	☐ Cleared ☐ Pending		
		☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending	☐ Done ☐ Pending ☐ N/A	☐ Done ☐ Pending ☐ N/A	☐ Cleared ☐ Pending		

QUICK REFERENCE: WARNING SIGNS DURING WINTER

Post at each location for staff reference. These signs indicate a service call is needed - do not defer.

What You Observe	Most Likely Cause	Action
Soda tastes more carbonated than usual - especially in morning	CO2 over-carbonating in cooler water temperatures	Contact service provider for CO2 pressure adjustment
Soda tastes syrup-heavy or off-ratio	Head master valve calibration drifted with temperature change	Contact service provider for head master valve check
Coffee tastes flat, stale, or bitter despite fresh product	Coffee oil buildup or scale-related brew temperature drift	Report to manager - schedule equipment cleaning and descaling
Ice production slower than normal	Condenser fouling or refrigeration issue	Contact service provider
Frozen beverage product inconsistent or not freezing correctly	Air filter or condenser issue - or ambient temperature affecting freezing cycle	Contact service provider
Any unusual noise from ice machine or frozen beverage unit	Mechanical wear or component issue	Contact service provider same day
Drive-through soda quality different from indoor	Temperature differential affecting line calibration	Contact service provider for separate drive-through head calibration check