



Auto Repair Shop Service Advisor Workflow Checklist Template 2026

Customer Appointment & Pre-Arrival Preparation

Procedures for reviewing upcoming appointments, verifying vehicle history, and ensuring necessary parts or tools are prepared before the client arrives.

Appointment Date

Appointment Time

Customer Name

Vehicle VIN/License Plate

Service Type

- ☐ Routine Maintenance
- ☐ Diagnostic Repair
- ☐ Emergency/Urgent Repair
- ☐ Tire/Alignment Service

Customer Reported Symptoms/Concerns

Write something...

Required Pre-Arrival Preparations

- ☐ Parts Ordered
- ☐ Bay Assigned
- ☐ Rental Car Arranged
- ☐ Loaner Vehicle Cleaned

Customer Previous Service Records

 Upload File

Vehicle Check-In & Initial Consultation

Steps for greeting the customer, conducting the initial walk-around, documenting existing vehicle damage, and documenting primary customer concerns.

Check-In Date

Enter date...

Appointment Time

Enter time...

Customer Name

Write something...

Vehicle VIN (Vehicle Identification Number)

Write something...

Vehicle Mileage

Write something...

Pre-existing Vehicle Damage Noted

- ☐ Scratches/Dents
- ☐ Windshield Chips
- ☐ Tire Wear
- ☐ Broken Lights

Customer Primary Concern/Complaint

Write something...

Photos of Existing Vehicle Damage

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Customer Authorization Signature

Service Estimation & Work Order Creation

Guidelines for translating customer concerns into technical labor/parts requirements, calculating accurate estimates, and securing digital authorization.

Customer Vehicle Description

Write something...

Primary Customer Concerns

Write something...

Required Services Type

- ☐ Oil Change
- ☐ Brake Service
- ☐ Tire Rotation
- ☐ Diagnostic Only
- ☐ Engine/Transmission Repair
- ☐ Suspension/Steering

Estimated Labor Cost

Enter a number...

Estimated Parts Cost

Enter a number...

Estimated Completion Date

Enter date...

Customer Authorization Signature

Pre-Repair Documentation

 Upload File

Internal Communication & Technician Handoff

Standardized workflow for transferring vehicle details and customer notes to the technician and assigning the job to the appropriate bay.

Handoff Date

Enter date...

Assigned Technician

- ☐ Lead Technician
- ☐ Junior Technician
- ☐ Apprentice
- ☐ Specialist

Required Tools/Equipment Needed

- ☐ OBD-II Scanner
- ☐ Hydraulic Lift
- ☐ AC Service Machine
- ☐ Brake Lathe
- ☐ Specialty Puller

Technician Specific Instructions

Write something...

Service Advisor Acknowledgment

Digital Vehicle Inspection (DVI) Review & Upsell

Process for reviewing inspection findings, communicating additional repair needs to the customer via digital media, and obtaining secondary approvals.

Inspection Status

- ☐ Pending Review
- ☐ Reviewed & Sent to Customer
- ☐ Awaiting Customer Approval
- ☐ Declined by Customer

Identified Urgent Repair Needs

- ☐ Safety Critical
- ☐ Maintenance Required
- ☐ Monitor at Next Visit
- ☐ Cosmetic/Non-Essential

Technician Findings Summary

Write something...

Inspection Photos & Videos

 Upload File

Estimated Additional Cost

Write something...

Service Advisor Review Signature

Parts Procurement & Pending Work Monitoring

Tracking the arrival of necessary components and managing the workflow for vehicles waiting on backordered parts to minimize bay downtime.

Part Status

- ☐ Ordered
- ☐ In Transit
- ☐ Delivered/In Shop
- ☐ Backordered
- ☐ Not Yet Ordered

Part Number or Description

Write something...

Expected Delivery Date

Enter date...

Estimated Part Cost

Enter a number...

Supplier Used

- ☐ Local Warehouse
- ☐ National Distributor
- ☐ OEM Direct
- ☐ Secondary Vendor

Procurement Notes

Write something...

Work Completion & Quality Assurance Verification

Final verification steps to ensure all line items on the work order have been addressed and the vehicle meets shop quality standards.

Quality Control Checklist Items

- ☐ All fluids topped up and levels checked
- ☐ Wheel lug nuts torqued to specification
- ☐ Oil drain plug and filter replaced and leak-free
- ☐ Dashboard warning lights cleared
- ☐ Vehicle cleaned (no grease marks on steering wheel/seats)
- ☐ Road test completed successfully

Post-Repair Inspection Photos/Video

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Technician Notes on Inspection Findings

Write something...

Verification Completion Date

Enter date...

Lead Technician Signature

Customer Notification & Vehicle Readiness

Protocols for notifying the customer that repairs are complete, providing final pricing, and coordinating pickup timing.

Notification Method Used

- ☐ Phone Call
- ☐ SMS/Text Message
- ☐ Email
- ☐ In-Person

Notification Sent Time

Enter time...

Scheduled Pickup Time

Write something...

Vehicle Readiness Checklist

- ☐ All repair items completed
- ☐ Invoice printed and verified
- ☐ Vehicle cleaned/wiped down
- ☐ Old parts available for customer (if requested)

Service Advisor Confirmation

Billing, Payment Processing & Documentation

Finalizing the invoice, processing various payment methods, and ensuring all digital signatures and service records are archived correctly.

Total Invoice Amount

Enter a number...

Payment Method

- ☐ Credit Card
- ☐ Debit Card
- ☐ Cash
- ☐ Check
- ☐ Invoice/Fleet Account

Documents Processed

- ☐ Signed Work Order
- ☐ Final Invoice
- ☐ Warranty Documentation
- ☐ Parts Receipts

Proof of Payment/Receipt Scan

 Upload File

Service Advisor Signature

Vehicle Delivery & Post-Service Follow-Up

Procedures for explaining the completed work to the customer during pickup and scheduling the follow-up call/email to ensure satisfaction.

Customer Name

Write something...

Delivery Date

Enter date...

Payment Method Used

- ☐ Credit/Debit Card
- ☐ Cash
- ☐ Check
- ☐ Invoice/Account

Post-Service Tasks Completed

- ☐ Service Advisor explained all repairs
- ☐ Customer receipt provided
- ☐ Warranty information explained
- ☐ Next service appointment scheduled

Customer Feedback/Notes

Write something...

Service Advisor Signature

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✓ Finish

✎ Generate Sample Report