



Automotive Dealership Service Appointment Support Checklist 2026

Pre-Appointment Verification

Steps to validate customer details, vehicle information, and scheduled service type before the client arrives.

Customer Full Name

Vehicle VIN (Vehicle Identification Number)

Service Type

- ☐ Routine Maintenance (Oil Change/Rotation)
- ☐ Brake Inspection/Repair
- ☐ Engine/Transmission Diagnostics
- ☐ Tire Replacement
- ☐ Recall Repair

Scheduled Appointment Date

Enter date...

Scheduled Appointment Time

Enter time...

Required Documentation Present

- ☐ Proof of Ownership/Registration
- ☐ Service History Records
- ☐ Insurance Information

Pre-arrival Vehicle Photos

 Upload File

Customer Arrival & Check-In

Procedures for greeting the client, verifying appointment timing, and conducting initial vehicle walk-around inspections.

Actual Arrival Time

Enter time...

Customer Name

Write something...

Vehicle License Plate Number

Write something...

Appointment Type

- ☐ Scheduled Maintenance
- ☐ Emergency Repair
- ☐ Warranty Work
- ☐ Recall Service

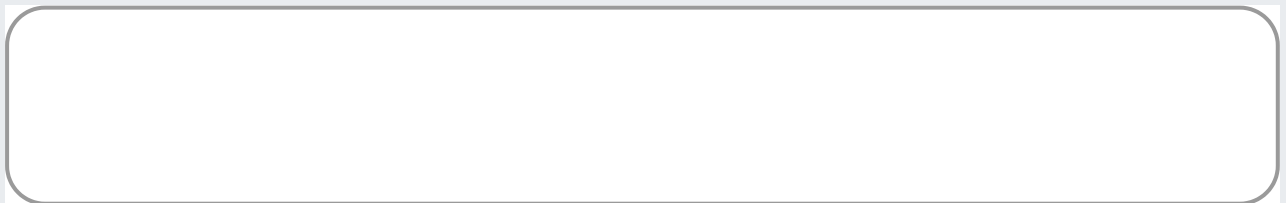
Pre-Arrival Inspection Items Noted

- ☐ Existing Scratches/Dents
- ☐ Tire Tread Condition
- ☐ Fluid Leaks Visible
- ☐ Warning Lights Active

Vehicle Damage Photos

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Customer Authorization Signature



Service Advisor Communication

Guidelines for documenting requested repairs, explaining estimated costs, and obtaining necessary repair authorizations.

Customer Primary Concern

Write something...

Detailed Repair Instructions

Write something...

Service Package

- ☐ Oil Change & Inspection
- ☐ Brake System Service
- ☐ Tire Rotation & Alignment
- ☐ Engine Diagnostics
- ☐ Full Vehicle Multi-Point Inspection

Estimated Repair Cost

Enter a number...

Additional Services Recommended

- ☐ Windshield Wiper Replacement
- ☐ Air Filter Replacement
- ☐ Battery Testing
- ☐ Fluid Top-off

Customer Authorization Signature

Service Status Updates

Protocol for notifying customers regarding technician progress, parts availability, and any unexpected delays.

Last Update Timestamp

Current Service Status

- ☐ Pending Parts
- ☐ In Progress
- ☐ Awaiting Technician
- ☐ Ready for Pickup
- ☐ Delayed

Customer Notification Method

Status Update Notes

Updated Repair Order Documentation

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Service Advisor Acknowledgment

Quality Control & Final Inspection

Final verification steps to ensure all requested services were completed and the vehicle meets dealership standards.

Completed Service Tasks

- ☐ Oil & Filter Change
- ☐ Brake Inspection
- ☐ Tire Rotation
- ☐ Fluid Level Check
- ☐ Battery Test

Cleanliness Status

- ☐ Interior Cleaned
- ☐ Exterior Washed
- ☐ No Cleaning Required

Technician Notes

Write something...

Post-Service Inspection Photos

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Lead Technician Approval

Billing & Payment Processing

Procedures for reviewing the final invoice, processing various payment methods, and handling warranty claims.

Total Invoice Amount

Enter a number...

Payment Method

- ☐ Credit/Debit Card
- ☐ Cash
- ☐ Financing/Loan
- ☐ Manufacturer Warranty
- ☐ Fleet Account

Applied Discounts

- ☐ Service Coupon
- ☐ Loyalty Program Discount
- ☐ Seasonal Promotion
- ☐ Military/Student Discount

Receipt/Transaction Proof

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Customer Payment Authorization

Vehicle Handover & Departure

Steps for explaining completed work to the customer, providing maintenance recommendations, and finalizing the exit process.

Vehicle Condition Notes

Write something...

Completed Service Items

- ☐ Oil Change
- ☐ Tire Rotation
- ☐ Brake Inspection
- ☐ Fluid Top-off
- ☐ Filter Replacement

Final Odometer Reading

Enter a number...

Final Invoice Copy

 Upload File

Customer Acknowledgment

Handover Date

Enter date...

Post-Service Follow-Up

Post-appointment tasks including satisfaction surveys, review requests, and scheduling the next maintenance interval.

Follow-Up Date Scheduled

Enter date...

Customer Satisfaction Score (CSAT)

- ☐ 5 - Very Satisfied
- ☐ 4 - Satisfied
- ☐ 3 - Neutral
- ☐ 2 - Dissatisfied
- ☐ 1 - Very Dissatisfied

Follow-Up Channels Used

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

Customer Feedback Notes

Write something...

Service Advisor Confirmation

< Previous

> Next

✓ Finish

 **Generate Sample Report**