



# Automotive Service Appointment Scheduling Checklist

 Show only Checklist

Display Style  
Default 

## Appointment Request Intake

Verify and log initial customer appointment requests (phone, online, in-person).

### Request Date

Enter date...

### Request Time

Enter time...



### Request Method

- Phone
- Online
- In-Person

### Customer First Name

Write something...

### Customer Last Name

Write something...

### Contact Phone Number

Write something...

## Customer Information Verification

Confirm customer details (name, contact information, vehicle details) and confirm service history.

### Customer First Name

Write something...

### Customer Last Name

Write something...

### Phone Number

Write something...

### Email Address

Write something...

### Vehicle Year

Enter a number...

### Vehicle Make

- Ford
- Chevrolet
- Toyota
- Honda
- BMW

### Vehicle VIN

Write something...

## Service Type & Vehicle Details Confirmation

Accurately record the requested service and confirm vehicle year, make, model, and VIN.

### Requested Service Type

- Oil Change
- Tire Rotation
- Brake Service
- Engine Repair
- Transmission Service
- Other

### Vehicle Year

Write something...

### Vehicle Make

Write something...

### Vehicle Model

Write something...

### Vehicle VIN

Write something...

### Odometer Reading

Enter a number...

### Customer Notes/Specific Concerns

Write something...

## Technician & Bay Assignment

Assign appropriate technician and service bay based on service type and availability.

### Primary Technician

- Technician A
- Technician B
- Technician C
- Technician D

### Secondary Technician (if applicable)

- Technician A
- Technician B
- Technician C
- Technician D
- N/A

### Service Bay

- Bay 1
- Bay 2
- Bay 3
- Bay 4

### Estimated Labor Hours

### Scheduled Start Time

## Appointment Scheduling & Confirmation

Schedule appointment in system, confirm date/time with customer and send confirmation (email/SMS).

### Appointment Date

### Appointment Time

### Service Advisor

- Sarah Miller
- John Davis
- Emily Carter

### Customer Preferred Contact Method

- Phone
- Email
- SMS

### Confirmation Message (Optional)

### Estimated Appointment Duration (Minutes)

## Pre-Appointment Communication

Send reminder notifications (email/SMS) prior to scheduled appointment.

### Reminder Send Date

### Reminder Send Time

Enter time...

### Reminder Method

- Email
- SMS
- Phone Call

### Custom Reminder Message (Optional)

Write something...

### First Reminder Days Before

- 1 Day
- 2 Days
- 3 Days
- 4 Days
- 5 Days

### Second Reminder Days Before

- 1 Day
- 2 Days


# Required Documentation

Ensure required documentation is ready prior to appointment (e.g., warranty information, inspection reports).

## Warranty Status

- Active
- Expired
- Unknown

## Previous Service Records

 Upload File

## Recall Status

- No Recall
- Open Recall
- Recall Completed

## Vehicle Inspection Report (VIR)

 Upload File

## Extended Warranty Coverage

- Yes
- No
- Pending