✅ ChecklistGuro

Automotive Service Appointment Scheduling Checklist

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

Enter a number...

Scheduled Start Time

Enter time...

Appointment Scheduling & Confirmation

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

Appointment Date

Enter date...

Appointment Time

Enter time...

Service Advisor

☐ Sarah Miller

☐ John Davis

☐ Emily Carter

Customer Preferred Contact Method

☐ Phone

☐ Email

☐ SMS

Confirmation Message (Optional)

Write something...

Estimated Appointment Duration (Minutes)

Enter a number...

Pre-Appointment Communication

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

Reminder Send Date

Enter 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