STANDARD OPERATING PROCEDURE

Vehicle Service Intake SOP

Document no.	SOP-AUT-001
Revision	1.0
Owner	Service Advisor
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To make sure every vehicle is checked in accurately, existing damage is documented before work begins, and the customer approves the scope and estimated cost in writing.

2. Scope

Applies to the intake process when a customer drops off a vehicle for service or repair. The multi-point inspection performed during service is covered by a separate SOP.

Definitions

Repair order	The written record of the customer's authorized services, cost estimate and vehicle details.
Walk-around	A visual inspection of the vehicle's exterior and interior condition done before work begins.
VIN	Vehicle identification number, used to confirm the exact vehicle and look up service history and specifications.

3. Responsibilities

Service Advisor	Greets the customer, documents the vehicle's condition and concern, and obtains approval for the repair order.
Technician	Reviews the intake notes before starting work and flags anything the walk-around may have missed.
Shop Manager	Resolves pricing disputes and approves any exception to standard intake procedure.

RACI matrix

Activity	Service Advisor	Technician	Shop Manager
Record the customer's concern	R/A	I	I
Perform the walk-around and photograph condition	R/A	C	I
Prepare the estimate and get approval	R/A	C	I
Review intake notes before starting work	C	R/A	I

Activity	Service Advisor	Technician	Shop Manager
Resolve a pricing or scope dispute	R	I	A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Shop management system for repair orders
- Walk-around inspection checklist
- Camera or tablet for photos
- Key tag and vehicle location log
- Printed or digital estimate form

5. Procedure

Step	Task	Owner	Done
5.1	**Greet the customer and confirm the appointment** Greet the customer, confirm their name and appointment details in the shop management system, and ask them to describe their concern in their own words.	Service Advisor	☐
5.2	**Verify vehicle and customer information** Confirm the vehicle's year, make, model and VIN against the shop management system, and update any changed contact information.	Service Advisor	☐
5.3	**Record the customer's concern in detail** Write down the customer's concern in their own words, including when it happens, any sounds or warning lights, and how long it has occurred.	Service Advisor	☐
5.4	**Perform the exterior and interior walk-around** Walk around the vehicle noting existing dents, scratches, windshield chips, tire condition and interior wear before the vehicle enters the shop. **Checkpoint:** Existing damage is documented and shown to the customer before the vehicle is moved into the shop.	Service Advisor	☐
5.5	**Record mileage and fuel level** Record the current odometer reading and fuel gauge level on the repair order for reference at pickup.	Service Advisor	☐
5.6	**Check for personal belongings and valuables** Ask the customer to remove personal belongings and valuables, or note any items they choose to leave in the vehicle.	Service Advisor	☐
5.7	**Photograph the vehicle's condition** Take photos of the exterior, interior and odometer reading and attach them to the repair order in the shop management system.	Service Advisor	☐
5.8	**Review prior service history** Check the vehicle's service history in the shop management system for related past work or open recommendations.	Service Advisor	☐
5.9	**Prepare the estimate** Prepare a written estimate covering the diagnosed or requested work, parts and labor cost, and expected completion time.	Service Advisor	☐

Step	Task	Owner	Done
5.10	**Obtain customer approval** Review the estimate with the customer and obtain their signature or verbal recorded approval before any work begins. **Checkpoint:** No work starts on the vehicle without a signed or recorded customer approval on the repair order.	Service Advisor	☐
5.11	**Tag keys and log vehicle location** Tag the keys with the repair order number and log where the vehicle is parked in the shop's intake queue.	Service Advisor	☐
5.12	**Communicate expected completion time** Tell the customer the estimated completion time and how they will be contacted with updates or for approval of additional work.	Service Advisor	☐
5.13	**Hand off the repair order to the technician** Route the completed repair order and intake notes to the assigned technician before the vehicle is moved to a bay.	Technician	☐

6. Quality checks

- Every vehicle has a documented walk-around with photos before entering the shop.
- No repair order proceeds to a technician without a customer-approved estimate.
- Mileage and fuel level are recorded on every intake.
- Customer contact information is confirmed current at every visit.

7. Records

- Repair order with customer approval
- Walk-around inspection photos
- Estimate and approval signature
- Key tag and vehicle location log

8. KPIs

- Average intake time per vehicle
- Percentage of intakes with complete photo documentation
- Estimate approval turnaround time
- Number of disputed damage claims per month

9. Common mistakes

- Skipping the walk-around photos when the shop is busy.
- Starting diagnostic work before the customer has approved an estimate.
- Not recording the customer's concern in enough detail for the technician to reproduce the issue.
- Forgetting to confirm the odometer reading at intake, causing disputes at pickup.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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