

CHECKLIST 1 OF 2

Repair counter intake

What to record before a customer leaves their item with you. Most repair disputes trace back to something that was not written down at the counter: an accessory, a crack that was already there, a price that was never agreed. Capture each item once, in a field, not in a notes box.

Identify the customer and the item

- ☐ **Customer name, mobile and email, verified**
The email is where the estimate and the ready-for-collection message go. Check it back to the customer.
- ☐ **Item type, make and model**
- ☐ **Serial number, service tag or IMEI, or a reason it is not available**
Ties the job to this unit and lets you spot a repeat repair on the same device.
- ☐ **Bought from you? Order number if so**
Decides whether this may be a warranty job rather than a paid one.
- ☐ **Declared value, and a manager sign-off above your high-value threshold**

Record the condition and the fault

Keep what the customer says separate from what the technician later finds. They are different fields.

- ☐ **Physical condition at intake, with photos**
Cracks, dents, scratches, water indicators. Dated, attached to the job.
- ☐ **Accessories received: charger, case, SIM, strap, cables**
Ticked off again at collection. An accessory nobody wrote down is a dispute waiting to happen.
- ☐ **The fault in the customer's own words**
What happens, when it started, what they have tried.
- ☐ **Whether the customer has a backup, or accepts the risk of data loss**
Recorded as a statement by the customer, not assumed.

Agree the terms before the work

- ☐ **General service terms accepted, with the wording version and date**
- ☐ **Diagnostic fee accepted, and what happens to it if the estimate is declined**
- ☐ **Spend limit set by the customer**
The amount above which you stop and ask. A revised estimate is how extra spend gets approved.
- ☐ **Consent for data work or irreversible work, where planned**
Only taken in person, never through an online booking.
- ☐ **Disposition of removed parts: return to owner, shop keeps, or dispose**
- ☐ **Australia: written repair notice given before accepting the item**
Required where the item can hold user data or refurbished parts may be used (ACL s 103). Use the mandated wording.

Before the customer leaves

- ☐ **Device password or PIN taken into a secure field, if the repair needs it**
Never in notes, never on the ticket, never on a sticky note.
- ☐ **Shelf or bin location recorded**
- ☐ **Receipt with the job number, promised date and agreed terms handed over or emailed**

CHECKLIST 2 OF 2

Estimate, approval and collection

The two gates a repair job should not pass without authority: work does not start until the customer has approved the price, and the item does not leave until the balance is settled or a manager has signed off the exception.

Diagnosis and estimate

- ☐ **Technician finding recorded against the item, separately from the reported fault**
- ☐ **Estimate built from labour, parts and any agreed diagnostic fee**
Tax-inclusive if that is how you price.
- ☐ **Estimate sent to the customer with accept, decline and ask-a-question options**
- ☐ **A changed estimate issued as a new revision, not an overwrite**
The customer needs to see what changed. Keep the old one on the record.
- ☐ **Estimate expiry set**
A stale price should not hold the bench.

Approval and payment

- ☐ **Customer's acceptance recorded before anything is invoiced**
- ☐ **Payment policy applied: pay first, pay on collection, or deposit then balance**
One policy per module, applied the same way to every job.
- ☐ **Committed spend checked against the customer's limit**
Over the limit means a revised estimate, not a phone call from memory.
- ☐ **Declined jobs: customer chose collect as-is, dispose, or pay the diagnostic fee**

Repair and QA

- ☐ **Blockers recorded when the job stops: parts, customer, payment, access, backup, subcontractor, manager, safety**
- ☐ **Customer told when the promised date moves**
- ☐ **QA checklist run, with measurements judged against targets where they apply**
Battery health, action height, timegrapher rate: whatever the trade measures.
- ☐ **Completion report prepared, listing the work done and the measurements taken**

Collection

- ☐ **Job is ready for collection, not merely repaired**
- ☐ **Balance taken first, or released under a manager exception with the reason recorded**
- ☐ **Device identity confirmed by tag scan or serial check**
- ☐ **Accessories from intake ticked off and returned**
- ☐ **Original parts handed back where the customer asked to keep them**
- ☐ **Collection record created; credentials wiped from the job**
- ☐ **Uncollected jobs reviewed after a set number of days**

How ReturnMate captures this: a three-step counter intake with versioned consents and a spend limit, a stage-driven job page with gates for authority and payment, estimates as revisions with a payment policy, encrypted device credentials with audited reveals, and a handover page that runs the collection checks. Details at returnmate.io/features/repair-management.