Collision Shop Digital Intake Checklist

24 checks / first contact to estimator handoff

Job ID

Intake owner

Check completed items. Note N/A or missing information in the job record with an owner and follow-up time.

01 Customer and job details

- [ ] Confirm the customer's name, preferred contact method, phone or email, and best time to reach them.
- [ ] Record the vehicle owner's details if different from the person arranging the repair; identify who can approve work.
- [ ] Create one job or lead ID, select the correct shop location, and assign the intake owner.
- [ ] Record the inquiry source, requested service, appointment or drop-off time, and next customer update.

02 Vehicle and arrival details

- [ ] Record year, make, model, VIN, and odometer reading when accessible; verify details against the vehicle at arrival.
- [ ] Record whether it was driven or towed in, its parking location, and the keys or accessories received.
- [ ] Identify EV or hybrid powertrain information and record reported warning lights, leaks, smoke, unusual odors, or other concerns.
- [ ] Route safety concerns to qualified staff using the shop's OEM-specific procedures; do not infer that a vehicle is safe to drive from photos.

03 Incident and condition notes

- [ ] Record the incident date, the customer's description of the impact, and the areas they want inspected.
- [ ] Record customer-reported warning lights, drivability concerns, unusual noises, or changes since the incident.
- [ ] Document visible condition and pre-existing damage at check-in; label uncertain items rather than guessing their cause.
- [ ] Record the insurer, claim number, and claim contact if applicable; mark unavailable information as pending.

Keep customer-reported concerns distinct from observed condition. Continue photo coverage, permissions, and handoff on page 2.

From photos to a clear handoff

Finish the record. Assign the next action.

Shop / date

Receiving estimator

04 Damage photo coverage

- [ ] Capture front, rear, both sides, and four corner views when safe and accessible; note any views that cannot be captured.
- [ ] For each visible damage area, capture an overall view, a medium view showing its location, and a sharp close-up.
- [ ] Capture VIN and odometer references when accessible, plus relevant warning indicators and pre-existing condition; avoid unrelated people and belongings.
- [ ] Check focus, lighting, glare, and completeness; attach original files to the correct job and label areas without editing away damage.

05 Permissions and supporting records

- [ ] Explain how contact details and images will be used, who may receive them, and the shop's privacy notice; record relevant permissions.
- [ ] Keep service-message preferences separate from marketing choices; do not treat a repair inquiry as a marketing opt-in.
- [ ] Attach any existing estimate, insurer correspondence, customer-provided records, and applicable signed shop authorizations.
- [ ] Confirm the scope of any authorized inspection, teardown, storage, or repair using the shop's applicable forms; flag missing approvals before work begins.

06 Estimator handoff and follow-up

- [ ] Review the job with the estimator: customer concern, vehicle identity, condition notes, photos, documents, and unresolved questions.
- [ ] Assign review of current OEM inspection, scanning, and calibration requirements; record who will address them and when.
- [ ] Mark intake complete or waiting on information; give every open item an owner, due time, and customer update plan.
- [ ] Record the receiving estimator and handoff time; confirm the next appointment or update without promising price or completion before assessment.

Handoff note: missing item / owner / due time / next customer update

Photos do not establish complete damage or roadworthiness. Use qualified inspection and current OEM procedures. This checklist is not a repair authorization.