

Inquiry and fit



Capture the request and the next step.

Job reference, date and contact

Customer name, phone and email

Unit make, model, year, identifier and location

Owner, approval contact and payer

Requested work, intended use and current concern

Timing, budget, access and photos

Specialist needs or referral

Next step, responsible person and date



Condition and scope

A starting record for the unit and proposed work.

Job reference, assessor, date and unit

Assessment permission, fee, limits and reference

Arrival condition, keys, accessories and photos

Findings, measurements and tests performed

Areas not inspected and specialist needs

Proposed tasks, materials, finish and exclusions

Completion criteria, next step, person and date

Estimate and work order



Keep the itemized scope and agreed terms with this estimate.

Job and quote reference, version, date and expiry

EDM business name, contact and registration details

Customer, approval contact, payer and unit

Included tasks, quantities, finish and completion criteria

Exclusions, assumptions and attached terms

Labor, parts, other costs, subtotal, tax and total

Payment stages, start date, timing and dependencies

Customer approval: name, method, date and reference

EDM approval, current work order and start conditions

Change request



Record a change to the agreed work, price or timing.

Job, change reference, date and original scope

Finding or request, photographs and affected work

Recommended work, alternatives and exclusions

Price change, revised total and calculation

Schedule change, handoff date and dependencies

Customer decision, date, contact and approval reference

Updated work order, next step and responsible person

Labor and parts



Use additional copies for more entries; keep receipts with the job.

Job reference, date, recorder and work order

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Work entries: date, person, task, outcome and hours

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Parts entries: supplier, item, quantity, landed cost and receipt

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Outside work: provider, scope, result and invoice

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Rework, unused parts, returns, credits and other differences

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Checked by, date and job-cost record

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Custody transfer



Record the unit, property and people involved in a transfer.

Job, unit identifier, date and time

Released by: name, role and location

Received by: name, role, location and authority

Condition, existing damage and photographs

Keys, accessories, documents and other property

Transport provider, arrangements and coverage reference

Acknowledgment, incident reference and next custodian

Quality and release



Record completion checks and any work still needed.

Job, scope version, reviewer and date

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Checks: requirement, method, result, evidence and reviewer

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Defects, corrections and responsible person

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Recheck method, result, reviewer and record

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Untested systems, exclusions, restrictions and open items

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Release or hold: decision, authority, date and next step

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Customer handoff



A concise record of what the customer receives.

Job, unit, date and person receiving the work

Completed work and agreed changes

Photographs, checks, parts, care notes and invoice

Remaining concerns, exclusions and follow-up

Keys, accessories and transfer record

Customer comments or acknowledgment

Open action, responsible person and date

Job closeout



Compare the estimate with the actual costs and collections.

Job, invoice reference, reviewer and date

Original price, agreed changes and revenue before tax

Cost comparison: estimated, actual and receipt references

Labor costs

Materials and freight

Outside services

Other costs, rework and credits

Direct contribution, percentage and costs not included

Tax, invoice total, deposits, collections and balance

Payment record, due date and collection action

Work and payment status, open issues and next estimate



Issue and follow-up

Keep the concern and its resolution with the original job.

Job, issue reference, person reporting, date and time

Concern, discovery date, location and photographs

Immediate risk, action and notification

Scope, checks, terms and assessment approval

Proposed response, cost responsibility and decision

Completed correction, recheck and customer contact

Status, next action, responsible person and date