

# Table of Contents

Topic	Page
<b>Section 1 – Shop Procedures</b>	
Frequently Asked Questions	1
Facility diagram	2
Hours of operation	3
Which Tech will work on a vehicle	3
Tech numbers	3
Road testing before repairs	4
Initial inspection	4
Recording vehicle information	4
Verifying symptoms or complaints	5
Notifying staff of additional needed work	5
General procedures for diagnosing and repair	5
How much time to spend diagnosing	6
Intermittent problems	6
When to ask for help	6
Vehicle routine servicing	7
Communication	7
What to do while waiting	7
Ensuring that all time is billed	7
Recommending repairs or service	8
Road testing after repairs	8
Cleanliness of vehicle	8
Car wash	8
Tools and equipment used	9
Lunch and breaks	9
In case of injury	9
Technicians working on their own vehicles	9
Shop related work	10
Warranty work	10-11
Guidelines for working on a customers vehicle	12-14
Notes	15
Schedule of recurring shop tasks	16
<b>Section 2 – Office Procedures</b>	
Hours of operation	17
Procedures for opening the business	17
Greeting customers	17
Incoming phone calls	18
Who answers phone	18
Making appointments and scheduling	18-19
Estimating	19-20
Customer intake	20-21
Checking service history and TSBs	21-22
Courtesy van service	22
Work authorization for additional needed work	22-23
Sublet services	23
Writing invoices	23-24
Notification of completion	24
Collection	24-25
Departure	26

# Table of Contents

Topic	Page
<b>Section 2 – Office Procedures (con't)</b>	
Comebacks	26-27
Follow up calls	28
Service reminders	28-29
Driveway inspections	30
Closing procedures	30-31
Other office procedures	31
Notes	32
Schedule of recurring office tasks	33
<b>Section 3 – Parts Procedures</b>	
Inventory control	34
Daily procedures	34-35
Communication	35
Special orders	35
Parts profit	36
Parts pricing	36
Errors in charging for parts	37
Parts returns	37-38
Authorization to order parts	38
Wrong parts	38
Freight	39
Chemicals and shop supplies	39
Miscellaneous	39
Notes	40
Schedule of recurring parts department tasks	41
<b>Section 4 – Human Resources</b>	
Human resources	42-46
Payroll, compensation and holidays	47-51
Notes	51
Schedule of recurring tasks	52
Sample job descriptions	53-65
Sample essential functions	66
Job application	67-69
Applicant rejection letter	70
Telephone reference check	71-72
Hiring checklist	73-74
New employee orientation checklist	75
Non-compete agreement	76
Suggestion form	77
Vacation request	78
Technician performance review	79-82
Service manager performance review	83-86
Office personnel performance review	87-90
Employee warning notice	91
Employee exit interview	92

# Table of Contents

Topic	Page
<b>Section 5 – Administrative Operating Procedures</b>	
Bookkeeping, accounting and legal	93
Accounts receivable	93-94
Accounts payable	95-96
General ledger	96
Marketing and advertising	96
Marketing budget	97
OSHA and safety	97-98
Meetings	98-99
Miscellaneous	99
Notes	100
Schedule of recurring administrative tasks	101
Company goals	102
Contact list	103-104
Sample verbiage	105
Confidential information	107
Security system passcodes	107
Internet usernames and passwords	107
Other passwords	108