

Shop Technology Checklist

Walk the shop one workflow at a time, from the front counter to the bays, and note what depends on what.

For: **Auto shop owners and service advisors**

Time: **about 20 min**

Date: _____

Prepared by: _____

Front counter

Workstations used for estimates, repair orders, scheduling, invoices

Shop management software

☐ Mitchell1 ☐ Tekmetric ☐ Shop-Ware ☐ Shopmonkey ☐ AutoLeap ☐ RO Writer ☐ Protractor ☐ Other Other: _____

Printers and scanners used at the counter

Recurring delays in the workflow

Who can contact the software vendor?

Service bays and shared devices

Devices in the bays

☐ Tablets ☐ Shared PC ☐ Label printer ☐ Scan tool with Wi-Fi ☐ Alignment / tire machine ☐ TV / digital board Other: _____

Where do connections drop or apps lag?

Does the issue follow a device, a location, or a time?

☐ Device ☐ Location ☐ Time of day ☐ Random ☐ Not sure Other: _____

Vendor requirements still unconfirmed

Phones, internet, and printing

Internet provider and business contact

Phone provider and business contact

How do calls reach the counter, and where do unanswered calls go?

Documents that depend on each printer

Who coordinates a multi-vendor problem?

☐ WOLFTRAXX SYSTEMS ☐ Owner ☐ Service manager ☐ Nobody yet Other: _____

Accounts and business records

Who approves new users and removes access when someone leaves?

Systems that hold business records

☐ Shop software ☐ QuickBooks ☐ Email ☐ Shared drive ☐ Parts portals ☐ Payment processor Other: _____

Who owns backups, and where are recovery instructions?

When was recovery last checked?

Next step. Bring this sheet to a conversation with WOLFTRAXX SYSTEMS. Keep passwords and payment details off it. Scope, responsibilities, and any pricing are confirmed in writing. 888.758.8577 · wolfraxxsystems.com/contact