

MECHANIC ROSTER

ACADEMY / STUDY BOOK

Estimate Transparency & Customer Authorization

Build clear estimates, document authorization, explain changes, and reduce preventable customer disputes.



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<https://mechanicroster.com/index.php/academy/estimate-transparency>

How to use this book

Read the lessons, work each example, then complete the practice questions before checking the answer explanations. Write your evidence and next step in the exercises. Training examples are not vehicle service specifications.

Mechanic Roster Academy is independent.

Edition 2026.10.15 | Free to download and print with branding retained.

Before you begin

Basic repair-order familiarity. This course teaches documentation practice, not a substitute for jurisdiction-specific legal advice.

Learning objectives

- Build an itemized estimate with clear diagnostic scope.
- Record the person, scope, amount and method of authorization.
- Control revisions before added work begins.
- Reconcile the invoice and preserve approved, declined and pending decisions.

Course contents

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Reconcile the invoice and close the record

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Build an estimate a customer can understand

An estimate is a decision document, not merely a price. Identify the customer, contact method, vehicle, mileage, date and repair-order reference. Record the concern in the customer's words. Separate diagnosis from a confirmed repair so an inspection authorization is not mistaken for permission to replace parts.

Describe proposed parts and labor in plain language. State quantity, unit price or calculation basis, relevant part condition or selection, diagnostic charges, fees and taxes as applicable. Explain what is included and what is excluded. If a diagnostic charge may be credited toward repair, state the condition clearly rather than allowing the customer to assume it is always waived.

Use evidence to support recommendations. A measurement, photograph with context or test result is more useful than "recommended by technician." Do not list an unconfirmed cause as proven. Separate urgent safety findings, repairs, scheduled maintenance and optional choices. Applicable estimate and disclosure requirements vary; use the current approved form and local requirements.

Fictional arithmetic

Parts \$180, labor \$240 and authorized diagnosis \$90 produce a \$510 subtotal before any applicable fees or taxes. If a \$50 diagnostic credit is explicitly approved, show it as a separate adjustment, giving \$460 before those other charges. Do not make the customer infer the credit from a changed total.

Read the estimate as if you had not spoken to the advisor. Can you identify the proposed work, cost basis, unanswered questions and decision needed?

Build from a finding, not a sales label

An estimate should allow the customer to understand what is proposed and why. Connect the concern to the observed finding, then distinguish diagnosis, repair, maintenance and optional work. "Complete service package" does not describe which operations will occur or what evidence supports them. Identify parts, quantities, labor scope, applicable charges and the total basis clearly enough to compare the proposal with the finished invoice.

Separate a diagnostic allowance from a repair quote. Permission to investigate a symptom does not automatically authorize every repair the investigation might reveal. Explain the point at which you will report findings and seek the next decision. If the cause is not established, do not present a specific part as a confirmed solution merely because the customer asked for a price.

Check the arithmetic and assumptions

For a fictional estimate, parts of \$180 and labor of \$240 total \$420 before disclosed applicable charges and taxes. If an optional \$45 operation is offered, make its separate status clear. Do not hide a required charge until pickup or count an optional item in an "approved" total before the customer decides. Record availability and timing assumptions that could change the plan.

Make the estimate readable before asking for approval

Separate the customer's concern, the diagnostic work proposed and any confirmed repair recommendation. A diagnosis charge buys a defined investigation, not necessarily a guaranteed repair. Describe the scope, relevant assumptions, pricing components and expected next decision. If a result is unknown, say so rather than presenting a likely part as confirmed.

A customer should be able to identify what is included and what is not. Use consistent quantities and units, and explain separately disclosed applicable charges. A headline subtotal without its scope is difficult to compare. The fictional arithmetic below teaches transparent calculation; it is not a statement of Florida fee or authorization law.

Authorization follows an understandable proposal

- Defined scope
- Informed decision
- Recorded approval

The approved version, items and amount must remain linked to the customer's decision.

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Try it before reading the answer

A customer authorizes diagnosis only. What should be explicit in the estimate?

Worked answer and reasoning

Define the diagnostic scope, charge and next decision point. State that a repair recommendation may follow the findings and requires the applicable separate authorization. Do not present diagnosis approval as blanket permission to replace parts.

Capture a precise authorization record

Authorization links an identified decision-maker to a defined scope and amount. Record who approved, their authority where relevant, the date and time, communication method, approved items and maximum or agreed amount. Retain the relevant signed or electronic record under shop policy and applicable requirements. “Customer said okay” without identifying what was approved is weak evidence.

Confirm the decision back in plain language: “You are approving these two repairs at this total, with this expected timing; the other recommendation remains pending.” Record approved, declined and pending items separately. A voicemail, an unread message or silence is not automatically approval. Possession of keys or earlier diagnosis approval does not automatically expand the scope.

If someone other than the named customer responds, establish their authority using the shop's approved process before accepting the change. Avoid collecting unnecessary personal information. Keep access to customer records limited to the staff who need it.

Authorization log

“RO 1042, 2:15 p.m., telephone conversation with the authorized contact. Approved line A and B totaling \$640 under estimate revision 2. Declined line C. Completion estimate Friday afternoon; next update Friday at noon.” This connects person, items, version, amount and expectations.

The exact legal form of authorization depends on jurisdiction and circumstances. This course does not invent a universal dollar allowance for exceeding an estimate. Follow the current approved process before work begins.

Authorization must be traceable to a specific scope

The record should identify the customer or authorized decision-maker, vehicle, repair order, estimate version, selected work, price basis, date/time and the decision captured through the applicable process. A note reading “customer said okay” is weak if nobody can determine which version or items were discussed. Record declined and deferred lines separately from approved lines.

Different jurisdictions and transactions can impose particular estimate, disclosure and authorization requirements. This course teaches the control principle, not a universal legal form or waiver. The shop must use current applicable requirements and an appropriate process for the communication method used. Do not assume that a generic signature eliminates every other requirement.

Prevent internal misunderstanding

The technician's job instructions should reflect the latest authorized scope, not the entire proposed estimate. If a customer approves brakes but declines a filter, both may remain visible on the document, but only the approved work is released. A manager or advisor's internal instruction does not itself substitute for the required customer decision. Reconcile the release before work starts.

Record who approved exactly what

A useful authorization record identifies the decision-maker, approved estimate version, selected items, amount, date/time and method. Verify that the person is authorized to decide under the shop's process. Possession of the vehicle or a familiar caller's name is not an unlimited authorization record.

Keep approved, declined and pending work distinct. An approval for one item does not convert the rest of an inspection into approved work. When recording a conversation, use factual wording and preserve the relevant scope. Do not backfill a missing approval with an invented call or assume silence means consent. Use the shop's current legally reviewed process for actual transactions.

A traceable decision

- Person Authorized decision-maker
- Version The proposal they actually reviewed
- Scope Selected items and amount
- Record Time, method and decision

Try it before reading the answer

The customer approves two of three items. What should the technician's work list show?

Worked answer and reasoning

Only the two approved items under their stated conditions. The remaining item stays declined or pending according to the actual decision. Retain the complete proposal and decision history without presenting unapproved work as authorized.

Manage added work and changed promises

A new finding creates a new decision, not automatic permission. Pause the affected unapproved work and prepare a revision describing the evidence, proposed scope, cost difference and time impact. Keep the original estimate linked to the revision so anyone can understand what changed. Avoid overwriting the old version as if it never existed.

Explain the options without pressure. If a component is worn but its cause is unconfirmed, distinguish the established condition from further diagnostic work. Describe any evidence-based operating concern accurately, without inventing urgency to force a sale. If a part substitution changes specification, warranty, price or timing, obtain the appropriate decision before proceeding.

Update the promised timeline when parts availability, testing or customer decisions change it. A useful update states known facts, an honest estimate of timing, the decision needed and the next update point. Contact the customer before a missed promise when possible, even if there is no final repair answer yet.

Revision case

The customer approved \$500 of defined work. Inspection reveals a separate \$140 repair. Create the added recommendation, explain the evidence and new total if accepted, and record the customer's decision. Do not treat the fact that the vehicle is disassembled as permission to add the charge.

If the customer declines, preserve the finding and decision. Explain documented implications and follow the shop's escalation process for an unsafe condition. A disclaimer does not itself make a vehicle safe.

Make a revision understandable

When new evidence changes the plan, preserve the original version and create a clear revision. State the new finding, additional or changed operation, cost difference, revised total and timing impact. Explain uncertainty rather than promising an outcome the diagnosis does not support. An added part should not disappear into a renamed package that obscures the change.

Suppose an authorized total is \$420 and a proposed additional operation is \$90 under the same exercise assumptions. Communicate both "an additional \$90" and "a revised total of \$510," then record the decision for the revision. If the customer declines, retain that decision and confirm what the remaining authorized scope can appropriately accomplish.

A timing change also needs communication

Do not wait until the customer arrives to reveal a known delay. Explain the dependency, what action is underway and when the next update will occur. Supplier estimates should not become guaranteed completion promises. Record the update and its owner so another employee can continue the conversation without guessing what was promised.

Work a revision without erasing history

A changed scope needs a linked revision and an informed decision through the applicable process. Preserve the earlier version so the change is understandable. Explain why the additional work is proposed, how it changes cost and timing, and which work must pause pending a decision. Internal manager approval is not the customer's required authorization.

In the fictional example, the original approved scope is \$420 before other disclosed applicable charges. A separate proposed item costs \$135. If the customer accepts it, the revised subtotal is \$555. Until acceptance, the proposal is not an authorized \$555 scope. Do not invent a universal amount that can be added without approval.

Fictional revision ledger

Version / item	Amount	Decision
Original scope	\$420	Approved
Added item	\$135	Pending until accepted
Revised subtotal	\$555	Only after the added decision

Try it before reading the answer

An added \$85 item is also proposed but declined. What is the approved subtotal after accepting the \$135 item?

Worked answer and reasoning

The approved subtotal remains \$555: $\$420 + \$135$. Keep the declined \$85 recommendation in the record, but do not add it to approved work or charges. Any other applicable charges must be handled as disclosed through the actual process.

Reconcile the invoice and close the record

Before delivery, compare each invoice line with the approved estimate or revision. Confirm that quantities, parts, labor, fees, credits and taxes reflect what was authorized and performed. Resolve unexpected differences before presenting the vehicle as ready for payment. A technically successful repair can still produce a preventable dispute if the invoice does not match the decision record.

Explain the work performed and verification results, then identify declined or deferred items separately. State applicable written warranty terms and any relevant limits without promising coverage beyond the actual policy. Provide a clear contact path for questions and follow-up. A review request should not replace the repair explanation.

Keep the concern, inspection evidence, estimates, revisions, authorizations, parts/service records, final invoice and relevant communications together under the retention policy. Preserve original timestamps and avoid backdating. If a correction is needed, add a clear correction trail rather than silently changing the history.

Resolve a mismatch

A customer does not recognize a \$75 line. Compare the line with the estimate and authorization record, explain the finding, and correct or escalate the mismatch before closing. “The technician always adds it” is not evidence of approval.

Use a final self-check: Can another advisor reconstruct who approved what, why the work was recommended, how the final price was calculated and what remains incomplete? If not, complete the record before handoff.

Reconcile before asking for payment

Compare the invoice with the latest authorized scope and the work actually completed. Check quantities, descriptions, agreed price basis, applicable charges, credits and any authorized changes. An estimate line is not proof that work occurred; a technician's completion note is not proof that added work was authorized. Both comparisons matter.

Resolve discrepancies before pickup through the applicable policy and requirements. Do not ask the customer to sign a retroactive statement that inaccurately says approval existed earlier. Preserve the sequence of events and escalate uncertainty. A clear record protects the integrity of the transaction more effectively than trying to make every document appear identical after the fact.

Explain the finished job

Walk through the approved work, verification result, remaining recommendations and relevant instructions. Provide the appropriate records and terms. If a condition remains unresolved, identify it plainly and state the next proposed step. The goal is that the customer and the shop share the same understanding of what was requested, approved, performed and charged.

Reconcile before delivery

Compare the final invoice with the approved scope, revisions and work actually performed. A mismatch should be investigated and resolved, not hidden behind a revised total. Keep product substitutions, changed coverage and other material differences visible in the decision record.

At delivery, explain performed work, verification, actual warranty terms and remaining recommendations. Avoid promises broader than the written terms or measured outcome. A clear invoice and handoff allow the customer to understand both what they purchased and what remains unresolved.

Final reconciliation

- Scope Original approval and accepted changes
- Work What was actually performed
- Invoice Items and amounts match the record
- Handoff Results, coverage and open items

Try it before reading the answer

The invoice includes a recommendation marked declined. What should happen before delivery?

Worked answer and reasoning

Investigate the mismatch and correct the invoice/work record through the appropriate process. Do not fabricate approval or assume the invoice itself establishes permission. Explain the resolved record clearly to the customer.

Work the shop cases

A revision without a clear total

A customer approves an exercise estimate of \$420. The advisor later calls and says “we found another item for \$90,” but records neither a revised total nor a clear decision. The technician completes the added work. At pickup the invoice is \$510 and the customer says the call was informational, not approval.

Identify the process gap, the record that should have existed and how the manager should approach the discrepancy without inventing a prior decision.

Your evidence, decision and next step:

Compare with the model answer

The shop failed to capture a traceable decision for the revised scope and price. The communication should have identified the finding, added operation, \$90 increment, \$510 revised total and timing, then recorded the decision under the applicable process before releasing the work. Preserve what actually happened, pause the normal handoff and resolve the issue through the relevant policy and requirements. Do not rewrite the note as an approval that was never established.

Proposed does not mean released

An estimate contains brake work and an optional filter. The customer approves only the brakes. Both lines remain on the printed estimate, and the technician performs both because “they were on the sheet.”

Design a clearer work-release record and a pre-invoice check. Explain how declined recommendations should remain visible without becoming work instructions.

Your evidence, decision and next step:

Compare with the model answer

Give each line an explicit decision status and link the approved scope to its version and decision record. The released job instructions should distinguish approved operations from proposed, declined or deferred recommendations. Before invoicing, compare actual work with that release and investigate exceptions. Keeping a declined finding visible supports future discussion; it does not authorize performance. A useful check asks both “was this done?” and “was this within the authorized scope?”

Apply it to a job

Draft an estimate with separate diagnostic, parts, labor and adjustment lines. Write a permission log for two approved items and one declined item. Create a revision adding a fictional \$140 repair to a \$500 authorized scope. Reconcile a final invoice to the approved revision and write a customer handoff that distinguishes completed from deferred work.

Concern / scenario

Observation, measurement and reference

Interpretation and next action

Unknowns and who needs to review

Verification and handoff

Check your understanding

- Write an estimate with clear scope and price basis.
- Distinguish diagnostic permission from repair authorization.
- Capture a decision for a specific estimate version.
- Communicate both an increment and revised total.
- Reconcile proposal, authorization, work and invoice without rewriting history.

Practice assessment

Ungraded practice, separate from the final assessment. Answers and reasoning follow in the next section.

1. Parts are \$160, labor \$220 and diagnosis \$80. What is the subtotal before other charges?

- A. \$460
- B. \$380
- C. \$540
- D. \$300

2. A customer replies “okay” to a message with three unclear alternatives. What follows?

- A. Treat all alternatives as approved.
- B. Clarify the selected scope and amount before proceeding.
- C. Choose the most expensive.
- D. Treat it as a rejection.

3. A new repair changes the approved total. What is needed?

- A. An invoice note after repair.
- B. A parts receipt only.
- C. A documented revised decision before added work.
- D. No action if the vehicle is already apart.

4. An invoice line has no matching approval record. What should happen?

- A. Collect payment before discussing it.
- B. Delete the earlier estimate.
- C. Assume standard shop practice is approval.
- D. Review and resolve the mismatch before closing.

5. An approved \$300 scope gains a separately accepted \$75 item. New subtotal?

- A. \$375
- B. \$225
- C. \$325
- D. \$450

6. Which record is most traceable?

- A. Customer said okay
- B. Person, version, items, amount, time and method
- C. Keys received
- D. Advisor remembers approval

7. What should a diagnosis estimate avoid promising without evidence?

- A. A defined test scope
- B. A stated charge
- C. A guaranteed cure from an unconfirmed repair
- D. A next decision point

8. Warranty wording should match what?

- A. Every possible future failure
- B. The longest competitor advertisement
- C. An unsupported verbal guarantee
- D. The applicable actual written terms

Answer explanations

1. \$460

Add all three authorized categories: 160+220+80. Do not silently omit or double-count diagnosis.

Review: Build an estimate a customer can understand

2. Clarify the selected scope and amount before proceeding.

Ambiguous consent needs clarification; it does not establish any particular selection.

Review: Capture a precise authorization record

3. A documented revised decision before added work.

The new scope must be approved; a later record or disassembly does not grant permission.

Review: Manage added work and changed promises

4. Review and resolve the mismatch before closing.

Reconciliation requires evidence, not assumption or removal of history.

Review: Reconcile the invoice and close the record

5. \$375

Add the accepted increment once.

Review: Manage added work and changed promises

6. Person, version, items, amount, time and method

The complete record identifies the actual decision.

Review: Capture a precise authorization record

7. A guaranteed cure from an unconfirmed repair

Diagnosis may lead to a recommendation; it does not establish a cure in advance.

Review: Build an estimate a customer can understand

8. The applicable actual written terms

Promises must not exceed real coverage.

Review: Reconcile the invoice and close the record

Further study

Use current vehicle and equipment information for actual service. These resources support further learning; lessons and questions in this book are original.

ASE service-consultant subject outline

<https://ase.com/tests/c1/>