

Your guide to the workday

A simple guide for repair technicians and customers. Updated September 17, 2026.

Start at wrench-roster.com

Open www.wrench-roster.com. Choose your sign-in option, or select **Set up your business** to register as a technician. The **How-To & Functions (PDF)** button opens this guide.

Customer	Create an account using your technician's booking code, confirm your email, and request service. Start on page 2.
Repair technician	Register your business, confirm your email, complete the subscription steps shown, and set up your technician PIN. Start on page 4.

One connected repair

Request service > confirm the appointment > prepare the estimate > customer chooses repairs > technician accepts approved work > complete the repair > finalize the invoice > record payment.

Pages 2-3	Customer navigation, booking, approvals, invoices and payments.
Pages 4-5	Technician setup, dashboard navigation, scheduling and repair progress.
Pages 6-7	Building estimates, accepting approved work, invoices and receipts.
Page 8	Saved tools, maintenance, messages, account help and troubleshooting.

Read the labels on your screen. This guide describes the current pilot. Optional maintenance controls appear only when enabled. Your technician sets repair prices; repair charges are separate from the technician's Wrench Roster subscription.

CUSTOMER / GETTING STARTED

Book service with your mechanic

Your account connects you to the repair business whose booking code you enter.

1. Create your customer account

Choose **Sign in as a Customer**, then **Create account**. Enter the booking code your technician gave you, your name, email and password. Complete the required checks and agreements. Open the confirmation email, confirm your address, then sign in.

Using Continue as a Guest

This option starts customer account creation and collects your vehicle details. You still need to confirm your email before bookings and records can be saved. It is not an anonymous booking option.

Book Service	Choose a vehicle and send a new service request.
Appointments	Review requests, confirmed times, notifications, repair progress and documents.
My Profile	Update your personal information, review saved vehicles and maintenance preferences.
Messages	Open conversations with your technician about a repair.

2. Check Meet Your Mechanic

At the top, review the business name, hours and available contact details. **Meet Your Mechanic** shows the technician's photo, bio, experience and certifications when they have provided them.

3. Submit a request

In **Book Service**, select a saved vehicle or enter a new one. Identify it with a **full VIN, last 8 of the VIN, or license plate**; color is optional. Choose the service, describe the concern, enter the service address, and choose a preferred date and time. Select **Submit request**.

A preferred time is a request, not a confirmed appointment. Check Appointments for your technician's confirmation. Times shown or entered use your device's timezone.

CUSTOMER / FOLLOWING THE REPAIR

Review, approve and keep your records

Use Appointments and the repair conversation to follow your job from request to receipt.

1. Review the appointment

Open **Appointments** and the relevant request. To propose a new time, choose **Request a different time** when available. Your technician must confirm it; the existing appointment remains on record until then. For cancellation or other changes, message your technician.

2. Approve the work you want

Open the request's **Estimates & invoices** or its estimate-review button. Read the repairs, findings, prices, tax and any drive fee. Approve all repairs, choose individually, or decline the proposed work. Review the selected total, add a note if needed, complete the consent checkbox, and submit your decision.

3. Follow repair progress

The status shows **En Route**, **Repair In Progress**, and **Service Complete** as your technician updates the job. Open **Message technician** to ask a question. The technician must accept your approved work before it becomes the agreed repair.

4. Review the final invoice and payment

Open **Estimates & invoices**, then the invoice. Check work performed, service details, total, payments and remaining balance. If **Pay With Cash** appears, select it and pay your technician directly. Selecting cash does **not** mark the invoice paid; the technician records money received. Otherwise, follow the payment instructions shown. Online card payment for repairs is not currently enabled.

5. Save your receipt

Choose **Print / Save PDF** while viewing a document. Select a printer or your browser's PDF destination. Estimates and invoices use white pages with dark text. Finalized receipts and agreed estimates are locked; ask your technician about corrections or additional work.

Notifications and reminders: unread notices are highlighted. Open the notice, then use **Mark as read**. Appointment confirmation and reminder emails can also prompt you to return to the site. Maintenance reminders depend on the technician's settings and your preference.

TECHNICIAN / FIRST-TIME SETUP

Set up your business

Create your business account once, then keep your working details current in Settings.

1. Register and sign in

On the homepage, choose **Set up your business**, or open **Sign in as a Repair Technician** and register. Enter your name, business name, email and password, and accept the required agreements. Confirm your email, then sign in. Create or enter your technician PIN when prompted.

2. Complete subscription setup

Follow the subscription screen to activate access through Stripe. Standard pricing is currently **\$14.99/month**. If an introductory offer is shown, follow its eligibility, card and renewal instructions; do not assume a trial is active until your account confirms it. Use **Settings > Manage Stripe subscription** for billing management.

3. Fill in your technician profile

In **Settings**, add your photo, short bio, experience and certifications. Enter your business name, working days, opening and closing times, and labor rate. Select **Save settings**. The customer sees your provided profile in **Meet Your Mechanic**.

4. Share your booking code

Find your customer booking code in **Settings**. Share the code with customers so they connect to your business. If you change it, select **Save settings** and give new customers the updated code.

5. Check document contact details

While building an estimate, open the business/contact information option. Provide your business name, technician name and phone; add optional business contact details as needed. These details appear on repair documents. Your supplied business phone and email also appear in the customer portal. Locked documents retain their saved information.

6. Set your drive fee if needed

In **Settings**, open **Drive fee** above the slogan. Enable the fee, enter the first-tier distance and each per-mile rate, choose round trip if applicable, and save. Enter the one-way distance on an estimate; review the calculated fee before sending.

Changing labor or drive-fee settings does not rewrite an existing saved estimate. Always review the actual estimate total before asking for approval.

TECHNICIAN / DAILY NAVIGATION

From request to completed repair

Start with **Jobs**. Use filters and individual job details to focus on the next task.

Jobs	Workday overview, notifications, requests, active repairs and recorded business totals. Use filters such as Today, Needs attention, Active jobs and Completed.
Estimates	Create an estimate or open one grouped by its stage. Saved Services and Labor Guide are available here as supporting tools.
Customers & Vehicles	Review customer records, vehicles, service documents and maintenance details.
Maintenance	Appears when enabled. Open a vehicle to review recommendations and history.
Settings	Profile, business hours, labor rate, booking code, reminder controls, drive fee, PIN and subscription management.

1. Review and schedule

Open a request in **Jobs** with **View Job**. Check the vehicle, concern, location, messages and requested time. Choose **Confirm** / **reschedule appointment**, enter the agreed time, then **Save appointment**. Confirm scheduling changes with the customer.

2. Use the job details

Open the job's sections for overview, **Estimate & costs**, messages and history. The cost summary shows approved amount, payment status and estimated profit. Use **Save notes** after editing notes. Open **Estimates & invoices** for the repair documents.

3. Keep the customer updated

Select **En Route** (red) when travelling, **Repair In Progress** (amber) when work begins, and **Service Complete** (green) when finished. Buttons are enabled only for allowed stage changes. Review and accept approved work before performing it.

Completion is not payment. Service Complete opens the invoice workflow. Review the work, finalize the invoice, and record payment separately. Dashboard updates normally appear automatically while the site is open.

TECHNICIAN / ESTIMATES

Build a clear agreement

You can start from a customer request or prepare an estimate for an existing customer and vehicle.

1. Start the estimate

From a job, open **Estimates & invoices > Create estimate**. To begin without a new customer request, open **Estimates > Create Estimate**, choose an existing customer vehicle and enter the service. The customer and vehicle must already be available to your business.

2. Add the proposed repairs

Add a repair title, description, findings and priority as appropriate. Use **Add labor / part / fee** for each repair. Enter descriptions, quantities or hours, and unit prices. Add saved services when useful. Keep line items assigned to the correct repair so the customer can choose repairs individually.

3. Review the totals

Check business contact details, labor and parts, notes, tax, and any drive fee. Subtotals and totals calculate automatically. Correct draft items before sending. A drive fee applies if at least one repair is approved; declining all repairs leaves no approved charge.

4. Send for customer approval

Select **Send Estimate**. The customer reviews it and can approve all, some, or none of the repairs. Watch the Estimates tab and notifications for a response. A sent estimate is not yet an agreement to perform every proposed repair.

5. Accept the approved work

Open the customer's response and review the approved repair set and amount. Use the technician acceptance action to accept that work. Once agreed, the estimate is locked to preserve the approved terms. Continue the repair through the job's status buttons.

6. Handle additional work separately

If you find more work after an agreement is locked, create a supplemental estimate using the additional-work option. Obtain approval for the additional repairs. Do not silently alter the original agreed scope or price.

Keep the customer in the loop. Use the job conversation for questions and explanations. The estimate response records approval; a message alone is not a substitute for submitting the estimate decision.

Finish the job with a clear receipt

The invoice is based on the approved work. Review it before finalizing.

1. Open the invoice

Choose **Service Complete** when the repair is finished. Review the invoice that opens. You can also return through the job's **Estimates & invoices** and use **Create / refresh invoice** when available. Review the approved repairs and totals.

2. Write the service record

Describe what was done. Record applicable details such as oil quantity, brand and viscosity, parts used and part numbers, and future service recommendations. Use **Save draft** if the finish details are not ready yet.

3. Finalize

Check the work performed, agreed charges, customer and vehicle details. Tick the confirmation and select **Finalize Invoice**. This locks the receipt's repair descriptions, prices, totals and finish details. Payments are recorded separately.

4. Record money received

Open the finalized invoice and enter the amount received, method and optional reference. Select **Record payment**. If the customer selected cash, the action reads **Cash Received**; confirm only the cash you actually received. You may record a partial payment and return later for the balance.

5. Check the balance and save

Review payment history and the remaining balance. The invoice is fully paid when the balance reaches zero. Both you and the customer can use **Print / Save PDF**. Estimates and invoices have white backgrounds for easier printing.

Customer selects cash	Records an intention to pay cash. No payment is recorded yet.
Technician records payment	Records money already received. This action does not charge a card.
Online repair payments	Not currently enabled. Arrange payment directly with the customer.

Finalized documents remain attached to the vehicle's repair history. Keep any downloaded copies you need for your own business records.

BOTH ROLES / REFERENCE

Tools, reminders and account help

Use the supporting tools when you need them. Your main repair flow stays in Jobs or Appointments.

Saved Services, Labor Guide and vehicle history

Technicians: open **Estimates** for reusable services and manual labor operations. Save frequently used descriptions, quantities and prices, then review them when building a new estimate. In **Customers & Vehicles**, open a vehicle for documents, specifications, notes, maintenance and history. Customers can review their own vehicle details from **My Profile**.

Maintenance and reminder preferences

Technicians: add or update vehicle maintenance items, due dates or mileage, visibility and reminder choices. Record completed maintenance and keep mileage current. In **Settings > Maintenance Reminders**, enable reminders, choose a style and timing, then save. Review the **Customers Opted Out** section when needed. Customers: in **My Profile**, use the service reminder preference when it appears; save any change. Opting out of maintenance reminders does not stop appointment or account updates.

Messages and notifications

Choose **Messages** for conversations, or **Message customer / Message technician** inside a repair. Type your message and send it. Review highlighted notifications and select **Mark as read** after checking them. If an email brings you back to the site, sign in to the account connected to that repair.

Sign-in or booking problems

Use **Forgot password?** to reset your password, or **Resend confirmation email** if needed. Check spam folders. If a booking code fails, ask your technician for the exact current code. Check that you chose the correct customer or technician sign-in. For missing updates, reopen the relevant section; save any draft before refreshing.

Subscriptions, help and deleting your account

Technicians manage billing through **Settings > Manage Stripe subscription**; follow the options shown in Stripe. Customers have no Wrench Roster subscription to cancel. Both roles can open **Help / Report a Problem** at the bottom of the site, submit a report and return to review replies. The same area contains **Delete my account permanently**. Deletion requires your email, current password, typing DELETE and confirmation. It is permanent and cancels a linked technician subscription. Save needed records first. Use **Sign out** when finished on a shared device.