



RepairForge

Setup & User Guide

Install, configure and run your repair business

RepairForge 2.3.0

WordPress repair-management software

Illustrated edition - July 2026

Forging the Future of Repair

Welcome to RepairForge

A practical guide to getting from a new WordPress installation to a working repair-management system.



What RepairForge does

- Manages repair tickets, customer and device details, appointments, statuses, quotes, photos and printed paperwork.
- Provides public booking and repair-tracking pages for customers.
- Adds Technician Mode for fast workshop updates and a searchable customer history.
- Pro adds automatic emails, SMS, Google Calendar synchronisation, the mobile app and barcode/QR scanning.

Before you begin

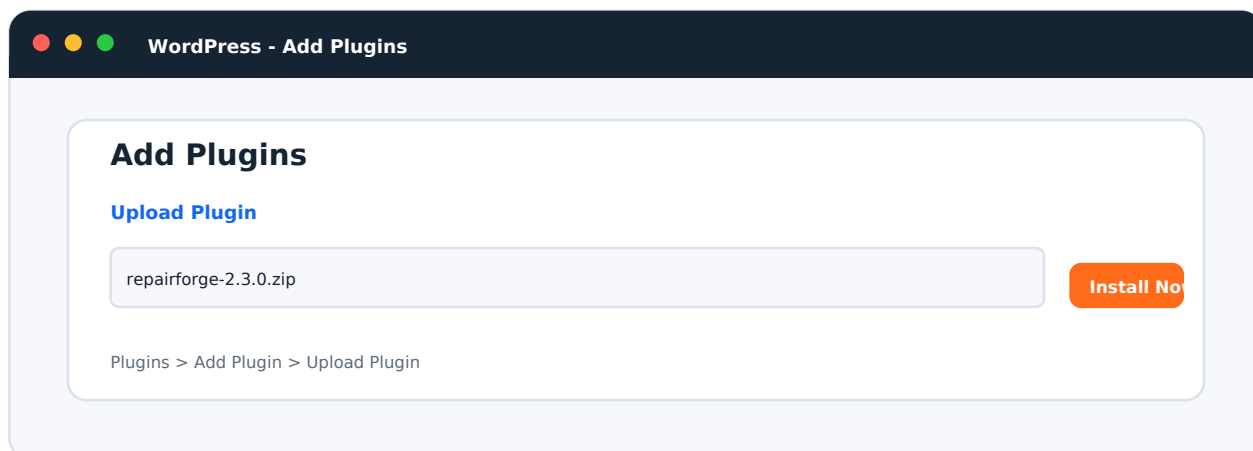
You need a working WordPress website, an administrator login and the RepairForge ZIP file. Make a database and file backup before upgrading an existing installation.

Contents

Pages 3-7	Pages 8-13	Pages 14-20
Install, licence, settings, services and availability	Public pages, dashboard, repairs, statuses, appointments and Technician Mode	Customers, quotes, documents, communications, mobile tools and troubleshooting

1. Install or update RepairForge

Use the integrated RepairForge 2.3.0 ZIP. The former Custom Workflow Statuses add-on is no longer required.



New installation

- 1 In WordPress, open Plugins > Add Plugin > Upload Plugin.
- 2 Choose the RepairForge ZIP, select Install Now, then Activate Plugin.
- 3 Open RepairForge > Plan & Licence. A new installation starts with a fully functioning 30-day Pro trial.
- 4 Open RepairForge > Settings and complete the first-time setup on pages 5-7 of this guide.

Updating an existing installation

- Back up the database and the existing RepairForge plugin folder.
- Upload the new ZIP and choose Replace current with uploaded when WordPress asks.
- If RepairForge Custom Workflow Statuses is still installed, deactivate and delete it after 2.3.0 is active. Your Workshop/Mobile selections are retained.

Multisite

Install from Network Admin and Network Activate when RepairForge is intended for every site. Each site still keeps its own settings and repair data.

2. Plans and licence activation

RepairForge keeps core workshop data available on every plan; Pro turns on automation and mobile features.

RepairForge - Plan & Licence

Current plan

Pro Trial

30 days - all features

Activate RepairForge Pro

LICENCE KEY

RF-PRO-XXXX-XXXX

Activate Pro licence

Feature	Basic	Pro Trial / Pro
Existing repairs and customer data	Available	Available
New repair tickets	2 per day	Unlimited
Online booking, calendar, quotes, photos, labels and tracking	Included	Included
Automatic customer emails and SMS	Pro required	Included
Mobile app / PWA and barcode/QR scanner	Pro required	Included
Google Calendar synchronisation	Pro required	Included
Pro updates and priority support	Pro required	Included

Activate Pro

- 1 Open RepairForge > Plan & Licence.
- 2 Paste the licence key from your RepairForge email into Licence key.
- 3 Select Activate Pro licence. The page should show the Pro plan and enabled features.
- 4 Use Check licence now after renewing or when the displayed status looks out of date.

Your data is safe

When a trial or licence ends, RepairForge moves to Basic and Pro-only services stop. It does not delete repairs or customer records.

3. Complete the main settings

Enter business details before creating customer pages or sending communications.

RepairForge Settings

Company Name
Smiths Computer Repairs

Company Email
repairs@example.com

Ticket Prefix
SCR

Tracking Page
Track Your Repair

Save Changes

1

Open RepairForge > Settings.

2

Under Business Details, enter the company name, email, telephone and website.

3

Under Repair Settings, choose a short ticket prefix such as PCS or SCR.

4

Create the tracking page described on page 8, then return here and select it in Tracking Page.

5

Under Customer Emails, enable automatic status emails (Pro) and customise the footer.

6

Select Save Changes.

Ticket prefix

Ticket numbers look like PCS-260722-001. Pick a prefix that customers can read over the phone and avoid changing it routinely.

Important timezone check

Open WordPress Settings > General. For a UK business choose London, not a fixed UTC offset. This allows appointments to follow GMT/BST correctly.

4. Choose Workshop, Mobile or both

RepairForge changes status buttons and public booking choices to match the services the business actually offers.

Selection	Customer booking choice	Repair workflow
Workshop only	Customer drop-off	Drop-off, Booked In and Customer Collection stages
Mobile only	Engineer visit / mobile repair	Visit Booked, Travelling, On Site and Repaired On Site stages
Both	Both choices	Combined list without duplicate shared stages

- 1 In RepairForge > Settings, find Repair Services Offered.
- 2 Tick Workshop, Mobile, or both. At least one must remain selected.
- 3 Save changes and test the public booking page in a private browser window.
- 4 Open an existing repair in Technician Mode and confirm the status buttons suit the chosen workflow.

Existing repairs

Changing service modes affects the choices available for future updates. It does not erase or rewrite the history of existing repairs.

5. Configure booking availability

Opening hours, closures and capacity determine which appointment requests customers can submit.

Open	Day	Opening	Closing
☒	Monday	09:00	18:00
☒	Tuesday	09:00	18:00
☒	Wednesday	09:00	16:00
☒	Sunday	09:00	13:00

Appointment length 60 min Call-out buffer 30 min

- 1 Tick each day the business accepts bookings and enter its opening and closing times.
- 2 Set Appointment Length (15-240 minutes). This is the standard booking duration.
- 3 Set the Call-out Buffer for travel or preparation after mobile appointments.
- 4 Set Maximum Per Slot to control how many bookings may share a time.
- 5 Add holidays, training days and other unavailable dates under Booking Closures.
- 6 Save and test several dates on the public booking page.

If a booking moves by one hour

First confirm WordPress Settings > General > Timezone is set to a named city such as London. Then re-save the appointment and compare RepairForge Calendar with the confirmed time.

6. Create the public booking and tracking pages

Two WordPress shortcodes give customers a booking form and a secure way to check progress.

The screenshot shows a dark blue header with three colored circles (red, yellow, green) and the text 'Customer-facing pages'. Below the header are two white boxes with rounded corners. The left box is titled 'Book a Repair' and contains two input fields: 'FULL NAME' with the placeholder 'Customer name' and 'DEVICE' with the placeholder 'Laptop'. Below these fields is an orange button labeled 'Send request'. The right box is titled 'Track Your Repair' and contains two input fields: 'TICKET NUMBER' with the placeholder 'SCR-260722-001' and 'EMAIL' with the placeholder 'customer@example.com'. Below these fields is a blue button labeled 'Check status'.

Page	Add this shortcode	Purpose
Book a Repair	[repairforge_booking]	Collects customer, device, fault and preferred appointment details
Track Your Repair	[repairforge_tracking]	Looks up a repair using ticket number and matching email address

- 1 Open Pages > Add New, name the first page Book a Repair, add the booking shortcode and publish.
- 2 Create a second page named Track Your Repair, add the tracking shortcode and publish.
- 3 Return to RepairForge > Settings and select the new tracking page.
- 4 Add both pages to the website menu and test them while logged out.

Privacy

The tracking page requires both the repair ticket number and the customer's matching email address. It shows customer-safe repair information, not engineer-only notes.

7. Use the dashboard and repair list

The dashboard highlights urgent work; the repair list is the main place to search and filter every job.



- Use Quick Find to search by ticket, customer, telephone, email, model or serial number.
- Select a summary card to open active work, today's bookings, jobs waiting for parts, jobs waiting for the customer, or completed jobs.
- Use Add New Repair for a staff-entered job; use Appointments for requests sent through the public form.
- On the repair list, use the status filter to focus on a single stage and open the ticket or Technician Mode from the row actions.

A useful morning routine

Check Pending Appointments, Waiting for Approval, Waiting for Parts and completed jobs before starting new diagnostics.

8. Add a repair ticket

Record enough detail at booking-in to identify the customer, the device and its condition later.

RepairForge - Add New Repair

Add New Repair

Customer Details

Telephone: 07123 456789

Customer Name: Alex Morgan

Device Details

Device Type: Laptop

Model: Latitude 5420

Publish

- 1 Select RepairForge > Add New Repair (or Repairs > Add New).
- 2 Enter the telephone number first. If RepairForge finds a returning customer, use the lookup result to fill name, email, address and postcode.
- 3 Record device type, manufacturer, model, serial number, accessories supplied and physical condition.
- 4 Describe the customer's reported fault in their words. Put diagnostics and work performed in Engineer Notes.
- 5 Add appointment/received details and select the correct starting status.
- 6 Publish or update the repair. RepairForge generates the ticket number automatically.

Before the customer leaves

Confirm the email address, serial number, charger/accessories and any visible damage. A quick condition photo can prevent misunderstandings later.

9. Move repairs through the correct workflow

Status buttons adapt to the enabled service modes. Shared stages are used only once when both services are active.

RepairForge workflow

Workshop

Pending

Drop-Off

Booked In

Diagnosing

Approval

Parts

Repairing

Testing

Collection

Mobile

Pending

Visit Booked

Travelling

On Site

Approval

Parts

Repairing

Testing

Repaired

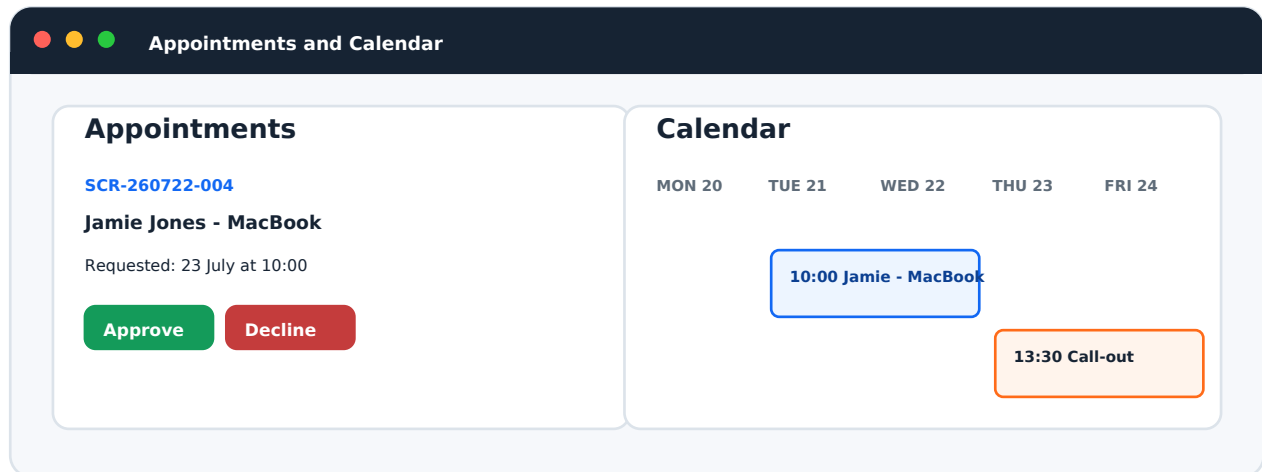
The available buttons adapt to the services selected in Settings.

Workshop status	Use it when
Pending Approval	An online request still needs staff approval
Customer Drop-Off	The customer is expected to bring in the device
Booked In / Diagnosing	The device is received / diagnosis is under way
Waiting for Approval / Parts	Customer approval or a required part is outstanding
Repairing / Testing	Work is being completed / final checks are under way
Customer Collection	The device is ready to be collected
Cancelled	The job will not continue

Mobile-specific status	Use it when
Mobile Visit Booked	An on-site appointment has been arranged
Travelling to Customer / Diagnosing On Site	The engineer is travelling / working at the address
Repairing On Site / Repaired On Site	Work is under way / completed during the visit
Follow-up Required	Another visit, part or further action is needed

10. Approve appointments and use the calendar

Online bookings arrive as Pending Approval so staff stay in control of the final date and time.



- 1 Open RepairForge > Appointments and review the requested type, date, time, contact details, device and fault.
- 2 Choose Approve, propose an alternative time, or decline. Pro can send the matching customer email automatically.
- 3 A confirmed appointment appears in RepairForge > Calendar. Select the event to open the repair.
- 4 For a manually entered job, complete Confirmed Date and Confirmed Time. RepairForge treats it as Confirmed when no appointment status was supplied.
- 5 After the appointment, move the job into the appropriate Workshop or Mobile repair status.

Calendar accuracy

RepairForge uses the WordPress site timezone. Set it before entering appointments, especially around the spring and autumn daylight-saving changes.

11. Work faster in Technician Mode

Technician Mode keeps the actions used during a repair on one clean screen.

The screenshot shows the 'Technician Mode' interface for a repair job. At the top, there's a dark header with three colored circles (red, yellow, green) and the text 'Technician Mode'. Below this, the job ID 'SCR-260722-003 - Dell Latitude - Alex Morgan' is displayed on the left, and a 'Print Job Sheet' button is on the right. The main area is divided into two sections: 'Repair Status' and 'Engineer Notes'. The 'Repair Status' section has a horizontal flow of buttons: 'Booked In', 'Diagnosing' (highlighted with a blue border), 'Approval', and 'Parts'. Below 'Booked In' is 'Repairing', and below 'Diagnosing' is 'Testing'. A small text 'Status changed to Diagnosing' is between 'Diagnosing' and 'Approval'. The 'Engineer Notes' section has a text input field with the placeholder 'Tested PSU and charger...' and a 'Save Repair' button below it.

- 1 Save the repair once, then select Open Technician Mode from the repair editor.
- 2 Select the new status. Only stages allowed by the service settings are shown; a legacy current status remains available so it can be changed safely.
- 3 Update Engineer Notes and add a short timeline note for important events or customer conversations.
- 4 Leave Do not email the customer unticked when a normal Pro status email should be sent.
- 5 Use the header buttons to manage photos and quotes, print a label/job sheet, sync the calendar or return to the full editor.
- 6 Select Save Repair and check the activity timeline.

Keep notes factual

Record diagnostic results, parts fitted, work performed and final tests. Avoid passwords or unnecessary personal information in general notes.

12. Find returning customers

The Customers screen groups previous repairs so staff can identify repeat visitors and review their history.

Customers		
SEARCH		
Search by name, telephone or email		Search Customers
Alex Morgan	07123 456789	4 repairs
Jamie Jones	07987 654321	2 repairs
Taylor Smith	01792 000000	1 repair

- Open RepairForge > Customers to search by name, telephone or email.
- Open a customer to review the devices and repair tickets linked to their contact details.
- When adding a new repair, enter the telephone number first. RepairForge normalises UK-style numbers, so 07..., +44 7... and 0044 7... can match the same customer.
- Check the suggested details before using them; customers may have changed address or email since their last repair.
- Update the new ticket rather than editing an old repair merely to change current contact information.

Duplicate customers

Consistent telephone and email formatting produces the cleanest customer history. Search before creating a second record for the same person.

13. Prepare and send a quote

Build a clear parts-and-labour quote, account for discounts or deposits, and record the customer's decision.

RepairForge - Repair Quote

Repair Quote - SCR-260722-003

ITEM	QTY	PRICE
Replacement charging port	1	£65.00
Labour	1	£45.00
Discount		-£10.00
Quote total		£100.00

Buttons: **Save Quote** (blue), **Send to Customer** (orange)

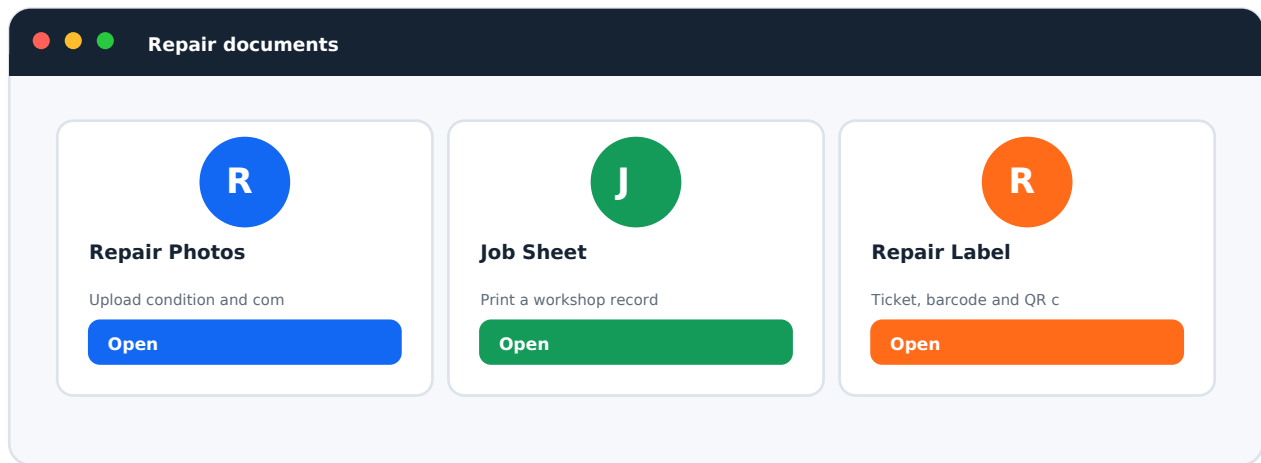
- 1 Open the repair in Technician Mode and select the Quote button.
- 2 Add one line for each part or labour item. Enter quantity and unit price.
- 3 Enter any discount and deposit already paid; verify the displayed amount due.
- 4 Add customer-facing notes, warranty limits or assumptions that form part of the quote.
- 5 Select Save Quote, review it, then choose Send Quote to Customer.
- 6 The public quote lets the customer approve or decline. Check the quote status before ordering parts or starting chargeable work.

Good practice

Do not rely on a verbal estimate for substantial work. List parts, labour, VAT treatment where applicable, deposit and total so the customer can make an informed decision.

14. Photos, job sheets and labels

Attach evidence to the repair and print the paperwork needed at the workbench.

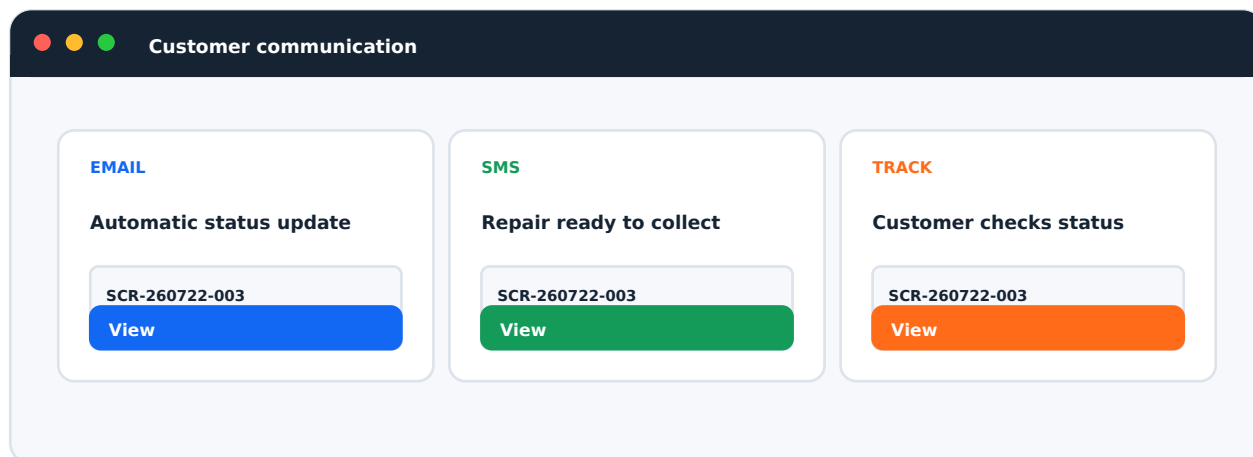


Tool	Recommended use
Repair Photos	Photograph received condition, damage, serial labels, internal findings and completed work
Print Job Sheet	Keep ticket, customer, device, fault and notes with the physical device
Print Label	Attach a compact ticket label with barcode and QR code for quick identification
Scanner (Pro)	Scan the printed code with a phone camera to open Technician Mode

- Take condition photos before dismantling and completion photos before returning the device.
- Keep labels away from vents, hot surfaces, screens and areas likely to leave adhesive residue.
- Test the printer scale once. Browser print scaling should normally be 100% unless the label template requires otherwise.
- Use the ticket number on every loose accessory, removed drive or bag associated with the repair.

15. Customer emails, SMS and tracking

Use the right communication channel while keeping an auditable status history inside the repair.



- Automatic emails (Pro): enable them under Settings. Status changes and appointment decisions use the customer's email stored on the repair.
- Suppress one email: tick Do not email the customer before saving a status change that is internal or being corrected.
- SMS (Pro): configure Sendmode access key, sender ID, default country code, event choices and message templates; send a test message before enabling automation.
- Review link: add the business review URL to the SMS settings if a completion message should invite feedback.
- Tracking: customers enter their ticket number and matching email on the tracking page to see the current customer-safe status.

Deliverability

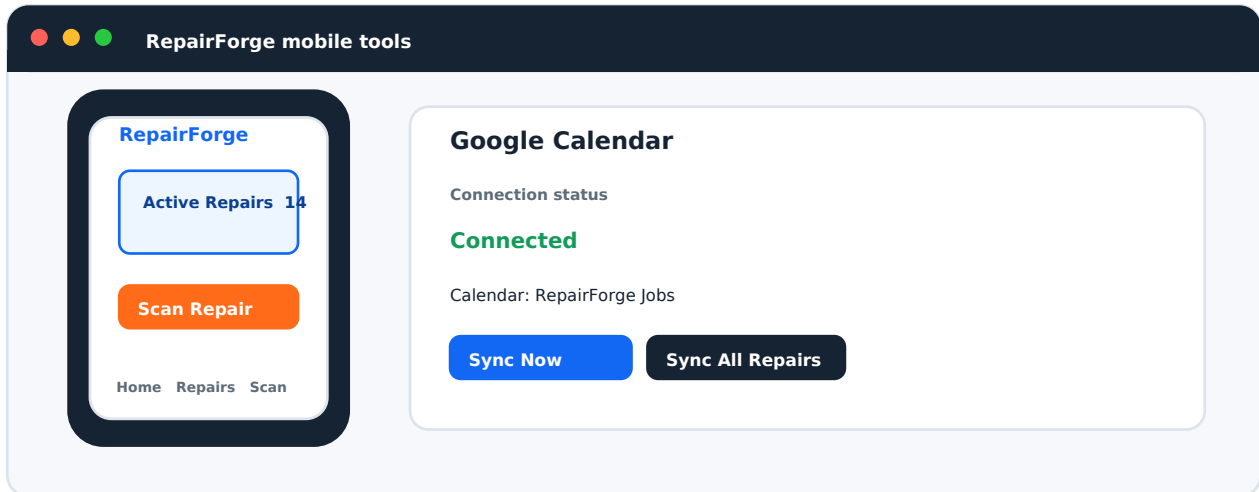
Use a company email address on the same domain as the website where possible. Configure WordPress SMTP and send test messages; RepairForge can request an email, but the web host/mail service determines delivery.

Consent and privacy

Only send operational updates that relate to the repair unless the customer has separately agreed to marketing messages.

16. Google Calendar, mobile app and scanner

Pro tools help technicians see appointments and open jobs quickly while away from the desk.



Google Calendar

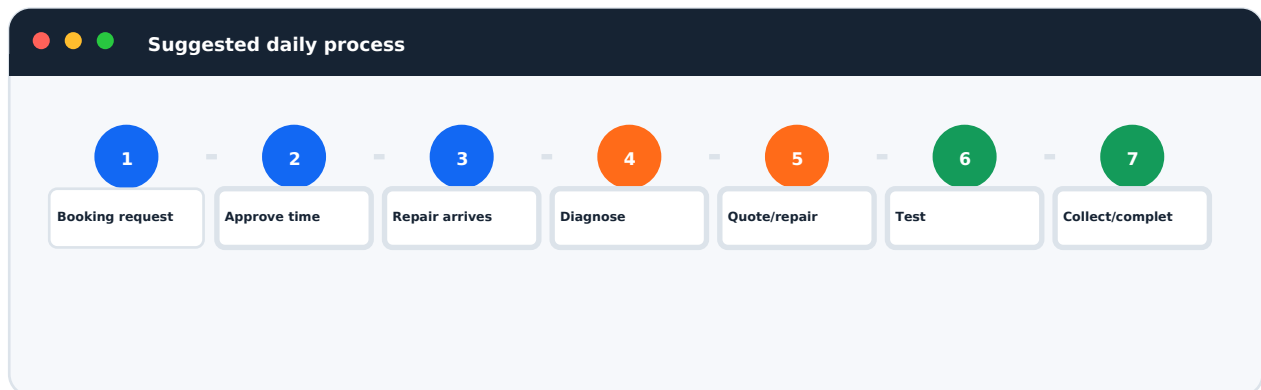
- Open RepairForge > Google Calendar, enter the Google OAuth client ID and client secret, connect the account, then choose the destination calendar.
- Enable synchronisation and use Sync Now on a repair or Sync All Repairs after first setup.
- Calendar events can include ticket, customer, contact, device, fault and location details. Use a business calendar with appropriate access controls.

Mobile app / PWA and scanner

- Open a RepairForge admin screen on the phone and use Install RepairForge; on iPhone/iPad use Share > Add to Home Screen.
- Use the bottom navigation to reach Dashboard, Repairs and Scan. Allow camera access when prompted.
- Scan the QR/barcode on a RepairForge label, or type the ticket number manually, to open the matching repair.

17. A simple daily workflow

A consistent process keeps bookings, repair notes and customer communications aligned.



- 1 Review new booking requests and confirm, propose another time or decline.
- 2 At drop-off or arrival, verify the customer, device, accessories, condition and reported fault.
- 3 Move the repair to Diagnosing and record test results in Engineer Notes/timeline.
- 4 If approval is needed, create and send a quote; use Waiting for Approval until the decision is recorded.
- 5 Record parts ordered/fitted and move through Repairing and Testing.
- 6 When complete, use Customer Collection, Repaired On Site or Follow-up Required as appropriate.
- 7 Print/retain paperwork as required, confirm payment, and close the job only after the device has been returned or the visit completed.

Backups

RepairForge stores business-critical records in WordPress. Use automated off-site backups and periodically test that a backup can be restored.

18. Troubleshooting and support checklist

Most setup problems can be narrowed down quickly by checking the plan, settings and one test repair.

Problem	Checks
Booking or calendar time is one hour late	Set WordPress timezone to London (named city), re-save the appointment, then compare the confirmed time and RepairForge Calendar
Appointment is missing from Calendar	Enter Confirmed Date and Confirmed Time; set Appointment Status to Confirmed or save with those fields completed
Wrong status buttons	RepairForge > Settings > Repair Services Offered; save Workshop/Mobile choices; refresh Technician Mode
Customer details do not autofill	Enter a recognisable telephone number; search Customers; confirm a previous repair has that number
Email does not arrive	Confirm Pro and automatic emails are enabled, verify customer/company addresses, configure SMTP, check spam and mail logs
SMS does not send	Confirm Pro, Sendmode enabled, access key/sender/country code, number format and test-SMS result
Google event does not update	Confirm Pro, connected account and chosen calendar; use Sync Now; reconnect if credentials changed
Scanner cannot use camera	Use HTTPS, allow browser camera permission, try the installed PWA or enter the ticket manually
Licence will not activate	Copy the complete key without spaces, confirm site internet access, select Check plan now and note the displayed error

Before requesting support

- Record the RepairForge version, WordPress version, PHP version and current plan.
- Copy the exact error message and note the steps immediately before it appeared.
- Say whether the problem affects all repairs or one ticket, and whether it also happens in a private browser window.
- Never send a live licence key, customer password or unnecessary customer data in a public message.

RepairForge support

Visit repairforgehq.com. Keep this guide with the plugin ZIP and update it when a new RepairForge version changes the setup or screens.