

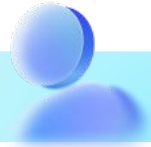
# More Billable Hours, Less Paperwork



## Your Monday Morning Outcome

By following this guide, your technicians and advisors will be running their full workflow on mobile devices – mobile check-in with digital signatures, MPI captured at the bay with photos and video, and parts requests submitted without leaving the lift. Technicians stop walking to desktops; advisors stop chasing paper.

### Before You Start



## Pre-Implementation Checklist

### ✓ Mobile devices provisioned

Every advisor needs a tablet. Every technician needs a phone or tablet at their bay. Without devices, the workflow does not work.

### ✓ Tekion mobile app installed

Confirm advisors and technicians have the Tekion mobile app installed and signed in. Test a single login on each device before training.

### ✓ Baseline pulled

Run the Technology Utilization Report and the Tech Performance Report today. Capture mobile login frequency and flag-hour percentages before go-live so you can prove the improvement.

### ✓ Set up Expectations

Plan a 30-minute briefing with advisors and technicians before they use the mobile workflow live. Assign a mobile champion in each team.



# Set Up Advisor Mobile Workflow

**Time:** 10 minutes | **Navigation:** Check-In Setup

Section	Recommended Configuration and Guidance
<b>General Setup – Mobile Check-In column</b>	<p>Allow opening of a new RO despite an existing open RO – ON; prevents advisors from being blocked at the drive when a customer has an open RO</p> <p>Allow skipping of customer signature in estimates during check-in through Contactless flows – OFF; Ensures signature is obtained digitally</p> <p>Determine department selection based on Service Advisor – routes the RO to the correct department automatically based on the writing advisor</p> <p>Prevent RO creation if media upload is not complete – not enabled by default; consider enabling if workaround photo compliance is a priority</p>
<b>Damage Inspection Settings – Mobile Check-In column</b>	<p>Min number of images (Express only) – Recommend 6; establishes a minimum workaround photo requirement before the advisor can proceed</p> <p>Skip Damage Inspection – ON by default; disable if your store requires damage documentation on every RO</p> <p>Max number of images (Express and Detailed) – set to 40</p>

**Section****Recommended Configuration and Guidance****Auto Add Check-In Opcodes / Check-In / Check-Out / Promise Time Settings / Terms and Conditions Configuration – Mobile Check-In column**

Recalls – Mandatory ON; advisors must address any open recalls before completing check-in

Recalls – Show Reasons ON; if a recall is deferred, the advisor must select a reason (Parts Unavailable, Not Enough Time – Scheduled Appointment, Not Enough Time – No Scheduled Appointment, etc)

Default Promise Date – Same Day; auto-populates to today when the RO is opened on mobile

Default Promise Time – 18:00:00; sets a default end-of-day promise time that advisors can adjust

Promise Time update (with reference to Check-In) – Current Promise Time; keeps the promise time stable after check-in unless manually changed

Disclaimer of Warranties – mapped to Body - Last Page Legal 1; confirm this is populated with your store's current disclaimer language

Privacy Policy – confirm mapping is in place; this appears at customer signature on mobile check-in

## STEP 02/03

# Set Up Technician Mobile Inspection

**Time:** 10 minutes | **Navigation:** Settings > Service > Technician Mobile

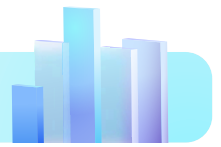
Workflow Step	Workflow Reference
<b>Verify MPI and Inspection Video Send Settings</b>	Inspection Settings > Settings > Inspection Communication Preferences
<b>Determine Media Requirements</b>	Verify what media is required, and expectations for Inspection Video (length, flow, and content)

## STEP 03/03

# Build the Daily Mobile Routine

**Time:** 5 minutes | **Navigation:** Service > Reports > Mobile Adoption

Routine	Configuration
<b>Morning Adoption Check</b>	Each morning, pull the Technology Utilization Report and the Advisor Performance report,
<b>Daily Mobile-Only Goal</b>	Set a daily target: every advisor opens at least one RO start-to-finish entirely on mobile. The technology is there. The variable is execution.



Report	Navigation	What to Look For
<b>Technology Utilization Report</b>	Reports > Reports > Technology Utilization	Mobile app login frequency, feature adoption rates (mobile RO, clock-in/out, MPI completion), and user engagement by advisor and technician. The single most important adoption metric.
<b>Tech Performance Report</b>	Service > Reports > Technician	Technician productivity – flag hours vs clock hours, utilization, efficiency, billable hours tracked through mobile workflows. Mobile adoption shows up here as more flag hours.