

# Mobile Check-In: Step by Step Guide


The Mobile Check-In tool allows for you and your team to check in customers while in the Service Drive. With this tool you can take a video walkaround to make sure you have a record of vehicle damage when arriving at your dealership, you can verify/add services to the RO, and you can even Print/Generate the RO in your DMS (depending on your DMS).

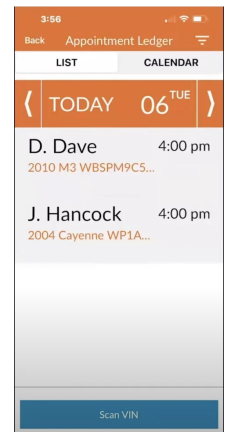
## Before You Start

- Scan the QR Code and Download the myKaarma app on your iPhone or iPad
- Open the myKaarma app and login with your myKaarma login credentials



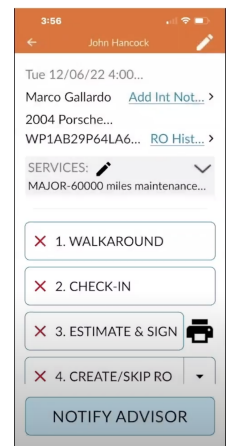
## Start the Check-In Process

- Access the “**Appointment**” option within the the menu of the mobile app to access your appointment ledger
  - Note: This mobile app menu can be accessed by selecting the  icon on the top left of your screen
- Select the Customer from the list of appointments or Scan their VIN to find their appointment or customer profile



## Verify Customer Information and Requested Services

- Once you have selected the appointment from the Appointment Ledger you should see a page similar what is displayed here (➔)
- The first step you should take on this page is selecting the pencil icon in the top right corner and verifying all of your customer’s information is up to date!
  - When you update this information in the App, it will push back and update the customer contact profile in your DMS!
- Next, you should verify the Original Customer Request(s) for service - you can see these by clicking the down arrow in the “Services” section.
  - Note: If you need to make changes on these items, select the Pencil icon in “Services” and select the pre-approved operations as needed!



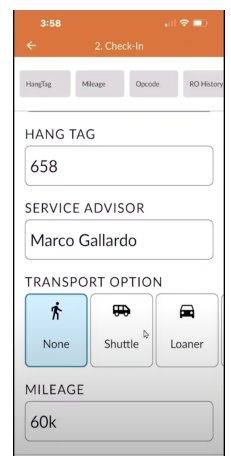
## Take a Video Walkaround

- After verifying your customer's information and requested services, select **"1. Walkaround"** and complete the video walkaround
  - To start recording, simply hit the big red button. While you are recording the video you can pause with the pause button and you can take photos during the recording to highlight specific areas of concern by clicking the white button.
- Once you are complete with your walkaround, simply select the red "Stop" button and hit "Save" to save the video and move on to the next step!



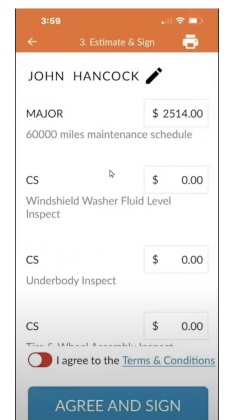
## Finish Adding the Check-In Details

- Once the video Walkaround is complete, you should select the **"2. Check-In"** option and fill out the other pertinent information for the Repair Order.
  - In this step, you should be updating the customer information to make sure information like the Service Advisor working with the customer, the hangtag number, vehicle mileage, and method of transportation are all accurate! You will also have the opportunity to see previously declined services, open Recalls, add in additional services directly from this step, and verify the preferred communication method.
- Once complete, select the "Save & View Est" button at the bottom of this screen to move to the next step



## Verify Service and Collect Customer Signature

- Review the services agreed upon during the Check-in process with the customer and get their signature to verify pre-approval on the Original Customer Requests
  - At this point, you can print out a Walkaround summary for the customer that provides a list of agreed upon services, their signature, and an audit trail of this check-in process to provide transparency



## Create RO and Print if Needed

- Once complete with the verification, you should see Green check marks next to each section completed so far. If all three of those sections are Green, select **"4. Create/Skip RO"** and select whichever option meets your dealership process!
  - RO Creation is only available on CDK, DealerTrack and DealerBuilt
  - RO Printing is only available for CDK

