

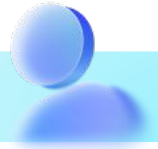
Eliminate Manual Payment Workflows with Tekion Pay



Your Monday Morning Outcome

By following this guide, you will have Tekion Pay capturing payments through links across service, parts, and F&I – with surcharge recovery configured, Buy Now Pay Later financing available, and automated posting so cashiers stop reconciling at the end of the day.

Before You Start



Pre-Implementation Checklist

✔ Tekion Pay in subscription

Confirm Tekion Pay is enabled in your subscription. If not yet enabled, contact your Customer Value Manager (CVM) before configuration. Activation requires onboarding paperwork that takes a few business days.

✔ Merchant accounts mapped

If you operate multiple rooftops, confirm each rooftop's merchant account is configured correctly in Tekion Pay setup. Payments to the wrong merchant account create month-end reconciliation problems that are painful to undo.

✔ Surcharge policy decided

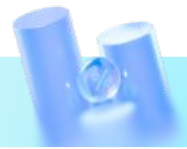
Decide your surcharge policy for credit card payments – pass through, absorb, or hybrid. State law varies; check your state's surcharge rules before turning on pass-through.

✔ Affirm and Sunbit decision

Decide whether to offer Buy Now Pay Later financing through Affirm and Sunbit. Both require separate enrollment. They are powerful for service customers facing a \$1,200 repair, but they are optional.

✔ Baseline captured

Plan a 15-minute briefing for payment-facing staff (cashiers, advisors, F&I) before go-live. Payment links change the customer interaction and staff need to be comfortable sending links and explaining them.



Enable Tekion Pay and Payment Links

Time: 10 minutes | **Navigation:** Apps > Payments > Payment Settings

Setting	Configuration
Activate Tekion Pay	Your CVM will get you provisioned for Tekion Pay- the 1st time you log in to the tile, you will be asked to set it up.
Payment Link Generation	Enable payment link generation on every customer-facing invoice. Cashiers and advisors can text or email a link to the customer; the customer pays from their phone.
Default Payment Methods	Configure which payment methods customers can choose on the payment link page – credit card, debit card, ACH, Affirm, Sunbit. Removing options the customer cannot use simplifies the screen.
Terminal Splash Screen	Upload an image to appear on the terminal when presenting to the customer for payment.

Configure Surcharge and Buy Now Pay Later

Time: 10 minutes | **Navigation:** Settings > Payments > Surcharge and BNPL

Setting	Configuration
Credit Card Surcharge	If your state and merchant agreement allow, enable surcharge recovery on credit card payments. ARC adds the surcharge automatically at checkout. Confirm the surcharge percentage matches your processor agreement.
Surcharge Disclosure	Determine the customer-facing surcharge disclosure language. Most states require explicit disclosure of the surcharge before payment. Use language your legal team has approved.
Affirm Integration	If enrolled with Affirm, enable the Affirm option on payment links. Best fit for vehicle sales and large service repairs. Affirm handles the financing; you receive the payment.
Sunbit Integration	If enrolled with Sunbit, enable Sunbit on service payment links. Sunbit specializes in service-aisle financing and approves a broader range of credit profiles than Affirm. Best fit for \$300-\$3,000 service repairs.

Configure Automated Deposits and Disputes

Time: 5 minutes | **Navigation:** Settings > Payments > Reconciliation

Setting	Configuration
Auto-Posting to GL	Enable automated posting of Tekion Pay transactions to the general ledger. Eliminates the daily reconciliation chore. Confirm the GL mapping is correct before turning auto-post on.
Daily Credit Card Deposit	Configure automated credit card deposit settings. Most stores use end-of-day deposit batching; high-volume stores may want morning and evening batches.
Dispute Notification	Set the email and user who receives Tekion Pay dispute notifications. Disputes need response within a defined window; surfacing them to the right person fast is critical to winning the dispute.
Dispute Documentation Workflow	Tekion Pay disputes can be responded to from within the dispute log. Train the accounting team to attach signed RO, payment authorization, and any communication trail when responding to a dispute.

Build the Daily Payment Routine

Time: 5 minutes | **Navigation:** Service > Day collection

Routine	Configuration
Morning Cash Receipts Review	Each morning, pull the Day collection report This should match your cashiered collections from Parts, Service, and Retail.
Review Journal Entry Screen	Confirm all prior-day transactions posted. Auto-posting should produce a clean report; exceptions are easy to spot.
Weekly Dispute Check	Pull the Tekion Pay Disputes log weekly. Any new disputes get assigned an owner and a response date. Disputes left unanswered turn into chargebacks automatically.
Monthly Surcharge Reconciliation	Each month, reconcile surcharge collected against surcharge owed to your processor. Surcharge is a pass-through; collected amounts should match processor charges within a small variance.
Quarterly BNPL Performance	Review Affirm and Sunbit transaction volume quarterly. Identify which advisors and which service categories are using BNPL. The advisors using it are typically closing higher-dollar service work; spread the practice.



Measure Your Results

Report	Navigation	What to Look For
Tekion Pay Transaction Log	Tekion Pay > Payments	Detailed record of all Tekion Pay transactions with timestamps, payment methods, and posting status.
Day Collection	Service > Day Collection	All cashiered received by type, amount, and pay method. Your end-of-day reconciliation source of truth.



Best Practices

Brief payment-facing staff before go-live

Payment links change the customer interaction at the counter. Advisors and parts staff need to be comfortable sending the link and explaining to customers why they are receiving a text to pay. Run a 15-minute briefing the day Tekion Pay goes live. Without that briefing, staff default to the old workflow and the system never gets used.