CRM-06 **CRM Track: Workshop** | 60 Minutes **2026**

No Duplicate Entry: From Lead to Deal with Mobile, CRM & Sales Concierge

TEKION ONE

Your Monday Morning Outcome

By following this guide, your sales team will capture customer information quickly and without typing information twice. Faster intake means your manager can start desking before the test drive is over.

Before You Start

Pre-Implementation Checklist

- **Tekion Mobile App installed on all sales devices**
  Verify the black-background Tekion app is downloaded and each salesperson can log in.
- **Sales Concierge enabled for your store**
  Confirm with your Customer Value Manager (CVM) that the Sales Concierge feature is active on your Tekion subscription.
- **CRM dashboard access confirmed for managers**
  Sales managers should be able to view the live CRM dashboard on a desktop. Verify login and permissions.
- **Practice license and VIN barcode printed**
  Print one practice driver's license and one VIN barcode per participant station for the hands-on scanning exercise.

STEP 01/03

Adding Lead via Mobile Application

Time: 10 minutes | **Navigation:** Tekion Mobile App > CRM

Action	Instructions
Scan the License and Create the Lead	Tap the teal + in the bottom right corner → select Sales → tap Scan in the upper right → hover over the front of the driver's license following on screen instructions until captured.
Verify & Complete Customer Info	Review the auto-filled fields: name, DOB, address, license number. Add email, cell phone number, Source Type, and Lead Source.
Check for Matching Contacts	Scroll to the bottom of the screen. If matching contacts appear, review them – select an existing Contact to tie in previous history. If none match, tap Create New Contact.
Confirm Lead in CRM Dashboard	Manager: navigate to the CRM Dashboard on your desktop. You should see the customer appear in the showroom in real time.

STEP 02/03

Add Vehicle Interest, Trade-In & Documents

Time: 15 minutes | **Navigation:** Tekion Mobile App > CRM > Lead > Vehicle Interest / Trade-In

Action	GLAM Instructions
Add Vehicle(s) of Interest	From the lead screen, tap Add next to Vehicle Interest. Search for stock #s or filter down by status or stock type.
Add the Trade-In	Scroll to the Trade-In section and tap Add. Choose from Scan Barcode, Scan QR Code, Enter Manually, or Add from Owned Vehicles. Confirm year/make/model, enter payoff amount and mileage, then tap Save.
Upload Buyer Documents	Scroll to Buyer Documents. The driver's license is already attached from the scan. Tap Add > Insurance Documents to photograph the insurance card.

STEP 03/03

Share the Sales Concierge Link

Time: 15 minutes
Navigation: Tekion Mobile App > Lead > Kebab Menu (⁝) > Share Concierge Link

Action	GLAM Instructions
Confirm Customer's Cell Phone and Email	From the lead screen, locate the Lead Details section and select Edit. Scroll down to confirm email address and phone number are correct.
Confirm Deal is Created	Locate the Deal section of the lead. Ensure deal has been created, if not create a deal now. This is required in order to share the Sales Concierge link.
Share the Sales Concierge Link	Scroll to the top of the lead in the mobile application. Select the Kebab icon (fourth box below the name). Select Share Concierge Link at the bottom of the menu.

Measure Your Results

Report	Navigation	What to Look For
License Scan Rate	Reports > CRM > Contact Info Capture Report – By Sales Rep	Visited Leads DL Captured and Capture %. Contact information captured from Visited leads.

Best Practices

- [x] **Don't Skip the Matching Step**

  Selecting an existing contact if a customer has been in the store previously is crucial. This will tie all of their previous Sales, Service, and Parts history into a wholistic view.