

Scale Smarter with Enterprise: One Workspace, One Truth

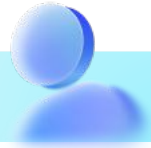
TEKION
ONE



Your Monday Morning Outcome

By following this guide, you will have an Enterprise workspace configured to manage users and roles in one shared space, view CRM activity across every store from one dashboard, and transfer vehicle inventory between stores without manual accounting work – so your managers stop spending up to 20% of their week switching between stores on administrative tasks.

Before You Start



Pre-Implementation Checklist

✔ Inter-franchise setups reviewed

Review your existing inter-franchise setups and confirm clearing accounts are configured the way you want before enabling enterprise workflows.

✔ User roles documented

List the roles in use today (Controller, Office Manager, GM, etc.) and identify backup coverage for each – Enterprise lets you compare and update roles in one place.

✔ Common name files identified

Decide which customer and vendor files should be shared across the organization to give you a true global view of who is doing business with your group.

✔ Vehicle transfer scope defined

Identify which stores will participate in inter-store vehicle transfers and confirm users have the access and permissions to request and approve transfers.

✔ Markup GL account identified

Determine the GL account where transfer markups should automatically post so the accounting is handled in the background when vehicles move between stores.



Configure the Enterprise Corporate Workspace

Time: 10 minutes | **Navigation:** Enterprise Workspace > Corporate Setup

Setting	Configuration
Enable Enterprise Workspace	Activates the Corporate Workspace at the top of your organization, giving you a global view across every store from one shared space.
Shared Name Files	Enable consolidated customer and vendor files across the organization so you see one customer, not 50 copies.
Global Visibility	Configure which managers can see and customize across regions (e.g., a State 1 GM with access to East region stores). Remove the option to restrict visibility.
Scalability Setting	Enterprise grows with you – configure for two dealerships or 200. Built into ARC with no bolt-on applications or outside software required.

Manage Users and Roles Globally

Time: 8 minutes | **Navigation:** Enterprise Workspace > Users & Roles

Department	User & Role Configuration
Global User View	Open the Controller role to see all 52 users assigned to it, their home dealerships, and whether each role is primary or secondary – all in one screen.
Role Search & Drill-In	Search and click any employee to see exactly what permissions and access they have in the ARC setup.
Compare Roles	Compare two roles side by side (e.g., Controller vs. Office Manager) before going on vacation so your backup has the right permissions.
Update From One Place	Update the Office Manager role directly from the comparison view and confirm the right permissions are assigned without jumping store to store.

Review the Enterprise CRM Dashboard

Time: 10 minutes | **Navigation:** CRM > Enterprise Dashboard

Department	Dashboard Guidance
Bird's-Eye View	Open the CRM dashboard from the Enterprise desktop to see a global view of CRM activity – no waiting, no running a report.
Total Retail Leads	View total retail leads across every store and surface any unresponded leads immediately – regardless of store or employee.
Appointments & Tasks	See upcoming appointments and outstanding tasks across the group from one screen so you always know where your people sit.
Exception Focus	Tekion turns massive amounts of data into small data – focus on the 5 or 6 exceptions that need attention, not the 995 things that are just fine.

Vehicle Transfer

Time: 10 minutes | **Navigation:** Vehicle Inventory > Transfers

Transfer Action	Configuration
Request a Transfer	From the source store's inventory, select the vehicle and click Request Transfer. Set the asking price – the system captures the markup automatically.
Start a Deal Without Transferring	From a vehicle in another store, click Start a Deal to show the customer numbers before initiating a transfer – useful when you want to confirm the sale first.
Create a Lead from Another Store	Click Create a Lead to capture the customer in your store's CRM tied to a vehicle that lives in a sister store's inventory.
Track Transfers In and Out	Click Transfers at the top of the screen to view transfer-outs, transfer-ins, transfer price, date, and any markup posted. All accounting is handled in the background – no manual posting required.



Measure Your Results

Report	Navigation	What to Look For
Vehicle Transfer Log	Vehicle Inventory > Transfers	Volume of inter-store transfers, asking price, markup posted, and time from request to approval.



Best Practices

✔ Compare and contrast user roles before vacation coverage

Use the Compare Roles view to confirm the backup (e.g., Office Manager) has the permissions the primary (e.g., Controller) holds. Update directly from the comparison screen so coverage is ready before the absence – not after.

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help.tekion.com/enterprise-management

TEKION ONE 2026

Implementation Guide | EXC-01: Enterprise Management – Multi-Rooftop Operations | Executive & Analytics Track.
This guide reflects Tekion ARC as of June 2026. Screen layouts may vary slightly based on your configuration.