

From Desk to Delivery in One Workflow

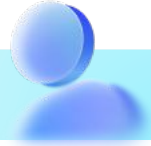
TEKION
ONE



Your Monday Morning Outcome

By following this guide, you will have the ARC deal workflow configured for faster desking with multiple scenarios, connected lender programs active, deal history with full pencil restoration, sub-statuses and audit log threads so deals communicate themselves, and DealGuard compliance checks running so every deal is fundable and compliant before the customer ever leaves the dealership.

Before You Start



Pre-Implementation Checklist

✓ Lender setups mapped

List your active lender relationships. Identify which are available as Connected Lender Programs in lender setups and which are not. Connected lenders provide live rate and program data; non-connected lenders require manual entry.

✓ Deal scenario starting points defined

Decide the standard scenarios you want every desk manager to present – cash, finance, lease, and a stretch option. Multi-scenario desking is faster when the starting scenarios are pre-defined and templated.

✓ Sub-status taxonomy defined

Define the sub-statuses your deals will use to communicate themselves – pending credit, awaiting documents, contract in transit, funded, ready for finance. Each is used for a specific stage and visibility owner.



STEP 01/04

Configure Multi-Scenario Desking

Time: 10 minutes | **Navigation:** Settings > sales setups, Deal Workflow

Settings	Configuration
Deal Templates	Build scenario templates for the standard desking scenarios – cash, finance, lease, stretch. Templates load with one click; desk managers stop building from scratch on every deal.

STEP 02/04

Activate Connected Lender Programs

Time: 10 minutes | **Navigation:** Settings > Lender setup

Settings	Configuration
Lender Setup	Activate each connected lender by searching and selecting from the lender drop down list for Tekion Lender Id. Connected lenders deliver live rate and program data directly into the deal – eliminating the desk-to-lender phone call and the rate sheet that goes stale.

Build Sub-Statuses

Time: 5 minutes | **Navigation:** Settings > Sales setups> General > Custom statuses > Sub-Statuses

Routine	Configuration
Deal Sub-Statuses	Configure deal sub-statuses to your liking or requirements such as pending credit, awaiting documents, contract in transit, funded, cancelled etc. Each sub-status communicates the deal's state to every department without anyone having to ask.
Daily workflow review	Each morning, the sales manager and F&I manager review the Sub-statuses that surface every stuck deal. Notes or Threads identify the open questions. 2 views, one workflow, no phone calls.

Best Practices

✓ Send the customer home with a fundable, compliant deal

The expensive deals are the ones that come back unfundable. DealGuard's value is that it catches the missing signature, the expired insurance, the unfinished disclosure before the customer drives off the lot – when the fix is one phone call, not a chase. Configure DealGuard as a hard gate, not a recommendation. The friction is real but the alternative is unfunded deals sitting in your queue for weeks.

Deal Guard is actively in pilot. As this moves from pilot to BEA to GA, we will continue to enhance it and bring it to dealers everywhere. I hope you are as excited as we are, timelines can be shared through your dedicated customer value team as we progress towards our Q4 launch goal.