

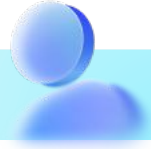
Turn Your Consumer Portal Into a Revenue Generating Touchpoint



Your Monday Morning Outcome

By following this guide, you will have your consumer portal configured with MPI videos, two-way texting, digital approvals, and online payment, allowing customers to approve recommended work and pay before pickup, without advisors burning hours on phone tag.

Before You Start



Pre-Implementation Checklist

✓ Portal branded and active

Confirm the Consumer Portal is enabled and accurately displays your dealership's logo and contact information.

✓ Mobile devices in the shop

Technicians and advisors need tablets or phones to capture MPI photos and videos at the bay. Without devices in the lane, MPI videos do not happen.

✓ Texting compliance reviewed

Two-way customer texting requires opt-in consent under state and federal rules. Confirm your customer communications policy is current before turning on automated text reminders and approval requests.

✓ Communication Templates configured and reviewed

Verify that your text and email templates are configured and communications are set to automatically send to customers.

✓ Baseline captured

Pull current Consumer Portal Performance, Advisor Recommendation Channel and Technology Utilization data before configuring. You need a before number to measure what changes.



Enable and Brand the Consumer Portal

Time: 20 minutes

Setting	Navigation	Configuration
Enable Consumer Portal	Customer Success	Ensure that Consumer Portal is active and sending to customers, if not please contact your Customer Success Manager.
Dealership Branding	Dealer Configuration > Dealer Details > Media Upload	Upload your logo and confirm the dealership name and contact information displays correctly. The portal is the customer's first digital touch, it should reflect your brand.
Advisor Display	Employee Onboarding > Employee Details	Set the portal to show the assigned advisor's name and photo on every interaction. Customers approve work faster when they recognize who is recommending it.
Promotional Service Display	Service Promotions > Service > Promotion Details > Consumer Service Experience	Enable machine-learning promotional services. The portal will offer vehicle-specific upsells such as cabin filter, alignment, tire rotation.

Configure Digital MPI

Time: 30 minutes

Setting	Navigation	Configuration
MPI Templates Active	Inspection Form Settings > Forms	Confirm accuracy of your MPVI form and settings. Require recommendations for critical (red) items and media for specific points.
Inspection and Video Settings	Inspection Form Settings > Settings	Enable inspection report and video to automatically send to the customer upon completion. This ensures they receive this quickly every time.

Configure Consumer Portal Functions

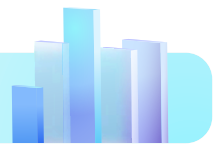
Time: 20 minutes | **Navigation:** Service Settings > Consumer Portal and Payment Settings

Setting	Configuration
Turn on Validation Code	Enabling the validation code (OTP) for signatures and recommendation approvals provides another layer of security and compliance.
Recommendation Setups	Customer approved recommendations through the Consumer Portal will automatically create new job lines and notify the applicable teams. This creates a seamless experience for both the service team and customer.
Inbound Reply Routing	Configure where inbound calls and texts will go to from the portal. Texts are recommended to route through the external communications in ARC.
Payment Options	Allows customer to leverage buy now pay later, bank transfer, crypto and digital wallet options directly through the Consumer Portal.

Build the Adoption Routine

Time: 15 minutes | **Navigation:** Reports > Service

Routine	Configuration
Daily Portal Review	Each morning, pull the Consumer Portal Performance Report. Review the prior day's approval rate and any recommendations that customers viewed but did not approve. Those are advisor follow-up opportunities.
Weekly Recommendation Audit	Pull the Advisor Recommendation Channel Report weekly. Compare approval rates by advisor and by channel (portal vs phone). Advisors with low portal approval rates may need training on Consumer Portal process and coaching customers through the workflow .
Monthly Promotional Service Review	Each month, review the Service Promotions Report. Identify which ML-suggested upsells customers accepted and which they rejected. Turn off promotions with low acceptance to keep the portal feeling relevant, not pushy.
Inspection Video Review	Monitor inspection video usage and approval rates with and without the video. Regularly audit technician's videos to ensure that they are following dealership and OEM guidelines and presenting properly to your customers.



Measure Your Results

Report	Navigation	What to Look For
Consumer Portal Performance	Reports > Service > Consumer Portal Performance	Tracks recommendations sold by advisor and through machine learning. Your primary measure of whether the portal is driving revenue.
Advisor Recommendation Channel	Reports > Service > Advisor Recommendation Channel	Compares advisor sales and usage for online vs offline recommendations. Identifies which advisors are leveraging the portal and which are still working the phone.
Technology Utilization Report	Reports > Service > Technology Utilization	Displays data on usage and performance with the Consumer Portal, texting, media and inspection video usage.



Best Practices

✓ Photos and videos are the conversion engine

Approval rates climb sharply when customers see what is wrong. Set a target and review usage with technicians and advisors in weekly meetings.

✓ Tekion Service AI

With Service AI, technician recommendations are automatically rewritten to be accurate and customer focused, customers will also be presented with recommendations in the order of most likely to buy as well as receiving a summary on their Consumer Portal Page. Please Contact your Customer Success team for more details.