



## **Appendix C Deleting Deals**

In some scenarios, an invalid deal is created in the system. For example, a salesperson may create a desk and add a customer but never actually present the sales scenarios to the customer. In this instance, the deal isn't a true deal. In this instance, you would not want to mark it as a lost deal because it would cause your lost sales statistics to be incorrect. In this case, you will want to delete the deal.

The delete deal feature is only available to users who have Dealer Principal and Finance Administrator access rights. No other users will have access to this feature. When you delete a deal, it is moved to a recycle bin. From this bin, you have the ability to restore the deleted deal or to permanently delete it.

# Important: The best practice is to mark valid deals that were never delivered as a lost sale using the Mark as Lost in the deal. This ensures the deal will be included in the Lost Sales Summary and allows you to search for the deal at a later date.

#### **Deleting a Deal**

Users with Dealer Principal and Finance Administrator access rights will see a Delete Deal link on the Information screen for the deal.

- 1. Click **Deals** in the blue toolbar at the top of the screen.
- 2. Select the deal from the Deals list.
- 3. Click the Information option in the left navigation panel and click Delete Deal.

Wilkerson	* +			
Information Applicants	Applicants	elete Deal	Reactivate Deal	Retail - Lost - 011615
Co-Applicant Insurance Vehicle	Applicant <u>Mr Thomas A Wilkerson</u> Co-Applicant <u>Mr William A Wilkerson</u>		ABC Store 2	•

4. The system will ask you to verify you wish to delete the deal. Enter an explanation for the deletion in the **Reason for Deletion** textbox and click **Delete**.

Delete Deal?		×
Are you sure you want to delete	this deal?	
Reason for Deletion		
	Delete	e Don't Delete

5. You will be returned to the Deals list, from which the deal has been deleted.

### **Reviewing Deleted Deals**

The deleted deals are moved to a recycle bin in the Tools area of the Admin section. Only users with Dealer Principal and Finance Administrator access rights have access to this area.

- 1. Click the Admin link.
- 2. Click the **Tools** tab in the blue toolbar at the top of the screen.



- 3. A list of deleted deals opens.
- 4. Click a deal in the list to view the reason that was added when deleting the deal.

	eals		** **			a)' ()	5 78	
Deal #	Status	Туре	Customer	Stock #	Vehicle Information	Purchase	Delete 👙	User
11619	Finance	Cash	Smith, Simon		2015 Chevrolet Silverado	10/02/2015	10/28/2015	elissa_toto
11643	Finance	Retail	Miller, Robert	12312A	2013 LEXUS RX 350	10/28/2015	10/28/2015	elissa_toto
11626	Finance	Retail	Wilkerson, Thomas	02167B	2016 Chevrolet Colorado	10/13/2015	10/27/2015	elissa_toto
11641	Finance	Retail	Jones, Ed			10/27/2015	10/27/2015	elissa_toto
11624	Finance	Retail	Banks, Bobby		2015 Chevrolet Silverado	10/06/2015	10/22/2015	david_sweet
ason for	Deletion							
ason for uplicate c	Deletion leal accidenta	Ily created						
ason for plicate o	Deletion leal accidenta	illy created						

#### **Restoring a Deal**

Restoring a deal adds the deal back to the active deals list.

- 1. Click the Admin link.
- 2. Click the **Tools** tab in the blue toolbar at the top of the screen.
- 3. Click on the appropriate deal from the list of deleted deals.
- 4. Click Restore.
- 5. The deal will be restored and available in the Deals list.

#### **Permanently Deleting Deals**

Permanently deleting a deal removes it from the system. You cannot restore a deal once you delete the deal from this bin.

- 1. Click the **Admin** link.
- 2. Click the **Tools** tab in the blue toolbar at the top of the screen.
- 3. In the list of deleted deals, click on the deal you wish to permanently delete.
- 4. Click Delete.
- 5. Click **Delete** when prompted to verify you want to permanently delete the deal.

Permanently De	elete Deal?	
Are you sure you deal?	ı want to permar	nently delete this
	Delete	Don't Delete

6. The deal is permanently deleted from the Deleted Deals list.

## Viewing the Deleted Deals Report

Users who have access rights to delete deals will be able to run a Deleted Deals report in the Sales reports. The report serves as an audit tool for the deleted deals.

- 1. Click the **Reporting** option in the blue toolbar at the top of the main FLEX DMS F&I screen.
- 2. Use the drop-down menu at the top of the screen to select Sales.
- From the list of sales reports, click on Deleted Deals or on the report's corresponding PDF symbol.
- 4. The report opens in a new Web browser tab.