



Chapter 5 The Dashboard

The Dashboard is the first thing you see when you log on to FLEX DMS F&I. It provides a screenshot of your activities and traffic. The information displayed depends on the user's access rights. Most of the tabs display graphs on the top of the screen and statistics on the bottom. The graphs provide a quick visual analysis of the information, while the statistics provide actual figures. The top of several tabs provides fields you can use to filter the list as needed to access the information you want.

Home

The **Home** tab is the default tab. It displays the current Deals list. Users with Sales Restricted access will only see their deals in this list. Users with Sales Administrator, Finance Restricted, Finance Administrator, and Dealer Principal access rights will see all deals in the list.

aal Turre		Deal	Status	Deal S-	urea.	Start Burghar - D-	to	End Burchasa Data	Employ	100	
		Activo		• Dear source		10/01/2015	le	11/20/2015		yee	
		• ////	ve	<u> </u>	•	10/01/2015		11/30/2015			
									Advanced Sea	Irch Clear	F
Deal #	Status	Туре	Customer	Stock #	Vehicle Informa	tion Purchas	e Activit	Source	Salesperson	Fin. Mgr.	In I
11644	Finance	Retail	Miller, Robert			10/28/20	15 10/28/20	15 Ad	Toto	Araujo	
11635	Finance	Retail	Wilson, Mike			10/22/20	15 10/27/20	15 Mailer	Sweet	Daugherty	
11642	Finance	Retail	Air Gas			10/27/20	15 10/27/20	15 Ad	Lawman	Hansson	
11638	Finance	Lease	Adkins, Matt	12312A	2013 LEXUS RX 350	10/27/20	15 10/27/20	15 Ad	Egbert	Larimer	
11640	Finance	Retail	Jones, Jeff			10/27/20	15 10/27/20	15 Ad	Toto	Harvey	
11639	Finance	Lease	Shop, Mitch			10/26/20	15 10/27/20	15 Ad	Shopinsky	Novotniak	
11634	Finance	Retail	Deal, Sweet			10/22/20	15 10/26/20	15 Ad	Sweet	Hansson	
11637	Finance	Retail	Harmer, Jason			10/23/20	15 10/23/20	15 Drive By	Harmer	Hansson	
11636	Finance	Retail	Smith, John			10/23/20	15 10/23/20	15 Ad	Sweet	Daugherty	
11633	Finance	Retail	Miller, Robert	02167C	2014 Chevrolet Cruze	10/22/20	15 10/22/20	15 Autotrader	Lehman	Larimer	
11631	Working	Retail	Jones, Jeff			10/21/20	15 10/22/20	15 Ad	Sweet	Harvey	
11630	Finance	Retail	James, Russel	45518N	2015 Nissan FRONTI	ER S 10/14/20	15 10/20/20	15 Walk in	Toto	Araujo	
11625	Finance	Lease	Darbunkle, Larry	2223	2015 Chevrolet Tahoe	10/09/20	15 10/16/20	15 Ad	Simpson	Daugherty	
11629	Finance	Retail	Wilson, Mike		2007 Nissan ALTIM S	L 10/14/20	15 10/14/20	15 Ad	Anthony	Harvey	
11628	Finance	Retail	Thomas, Joe	12312A	2008 Chevrolet Malibu	10/13/20	15 10/13/20	15 Ad	Anthony	Araujo .	
11627	Finance	Retail	Wilkerson, William	02167B	2016 Chevrolet Colora	ido 10/13/20	15 10/13/20	15 Ad	Anthony	Novotniak	
11620	Finance	Retail	Smith Towing			10/02/20	15 10/02/20	15 Ad	Toto	Larimer	

Tip: The system will save your last search, so if you leave this screen, the system will display the results of your latest search when you return to the Home tab.

Prospect Summary

The **Prospect Summary** tab is an overview of the prospects based on the up type: Walk In, Phone, Internet, and Other. These are assigned when you add an up to a deal. The information is broken down for today, yesterday, month-to-date, and previous month-to-date.



Sales Summary

The **Sales Summary** tab provides sales counts and sales gross. The left side of the screen displays sale counts, and the right side of the screen displays sale gross. The information is broken down by vehicle type (new and used) and date (today, yesterday, month-to-date, and previous month).



Salesperson Ranking

The **Salesperson Ranking** tab displays only statistical data. It provides the sales ranking for the salespeople. In addition to up counts, it displays the number of sales, closing ratio, total gross, and average gross for each salesperson. It also breaks the information down by vehicle type: new and used.

Home Pros	spect Summ	ary Sa	les Summ	ary Sales	person Ran	king Sc	ource Ran	king Lost	Sales Summ	nary			
Status Type Sold •	Status Type Gross Type Start Date End Date Sold Back Gross 10/01/2015 10/14/2015 Filter												
Salesperson	Up Count	Sold 👙	Closing Ratio	Gross Total	Gross Average	Up Count New	Sold New	Gross Total New	Gross Avg New	Up Count Used	Sold	Gross Total Used	Gross Avg Used
5 t	2	2	100.00%	\$2,040.00	\$1,020.00	1	1	\$1,690.00	\$1,690.00	1	1	\$350.00	\$350.00
Mark Simpson	1	0	0.00%	\$0.00	\$0.00	1	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
Chris Anthony	3	0	0.00%	\$0.00	\$0.00	2	0	\$0.00	\$0.00	1	0	\$0.00	\$0.00
Elissa Toto	2	0	0.00%	\$0.00	\$0.00	1	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
Joe Stuckert	1	0	0.00%	\$0.00	\$0.00	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
					14 <4	Page 1	of 1 IP> IP	5 🔻					∨iew 1 - 5 of 5

Source Ranking

The **Source Ranking** tab displays information about the sources that brought customers into the dealership. The sources are added when adding an up to a deal. These are custom codes added to the system setup. This information can be useful when you want to evaluate your advertising sources.

Home Pro	spect Summ	ary Sa	les Summ	ary Sales	person Ran	king Sc	ource Ran	king Lost	Sales Sumn	nary			
Status Type Sold	Gross Ty Back Gr	pe ross ▼	Start Dat 10/01/2	e 015	End Date 10/28/2	9 015	Fil	Iter					
	Prospect Total												
Source	Up Count	Sold 🔤	Closing Ratio	Gross Total	Gross Average	Up Count New	Sold New	Gross Total New	Gross Avg New	Up Count Used	Sold	Gross Total Used	Gross Avg Used
Ad	15	2	13.33%	\$2,040.00	\$1,020.00	4	1	\$1,690.00	\$1,690.00	3	1	\$350.00	\$350.00
Drive By	1	0	0.00%	\$0.00	\$0.00	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
Walk in	1	0	0.00%	\$0.00	\$0.00	1	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
Autotrader	1	0	0.00%	\$0.00	\$0.00	0	0	\$0.00	\$0.00	1	0	\$0.00	\$0.00
Mailer	1	0	0.00%	\$0.00	\$0.00	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
Previous Customer	1	0	0.00%	\$0.00	\$0.00	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00

Lost Sale Summary

The **Lost Sales Summary** tab provides information about lost sales. The lost sales codes were established in the system setup and are assigned to deals when a deal has been created but will not be competed. This provides a look at your potential sales and the reasons for losing sales, allowing you to evaluate both the internal and external reasons that led to the lost sales. You can then use the information to make necessary adjustments to your sales or inventory practices.

Home Prosp	Home Prospect Summary Sales Summary Salesperson Ranking Source Ranking Lost Sales Summary												
MTE	33%	Reason	Upside Do Bought Els Bad Credit No Deal Shopping No Rebate Shopping More for TI No Match Not Enoug	wn ewhere ote ss rade h Cash Dowr	Not End	ough Cash D No M More for Ti Shop No Reb Casual Q Shopping Pr No Bad C ought Elsew Upside D	own atch rade ping ates uote cices Deal redit eredit own 0 2	MTD Lo	St Gro	DSS	Type • New • Used • Total		
Reason	MTD Count	MTD Gross Total	MTD Average Gross	PM Count	PM Total Gross	PM Average Gross	MTD New Count	MTD New Total Gross	MTD New Average Gross	MTD Used Count	MTD Used Total Gross	MTD Used Average Gross	
Upside Down	1	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Bought Elsewhere	1	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Bad Credit	1	\$100.00	\$100.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	1	\$100.00	\$100.00	
No Deal	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Shopping Prices	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Casual Quote	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
No Rebates	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Shopping	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
More for Trade	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
No Match	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Not Enough Cash Down	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	
Total	3	\$100.00	\$33.33	0	\$0.00	\$0.00	0	\$0.00	\$0.00	1	\$100.00	\$0.00	

Dashboard Reports

The **Dashboard Reports** link above the Dashboard tabs takes you to the Reporting screen and automatically selects to display the dashboard reports. Click a report link or its PDF symbol to generate the report. See Chapter 6 Reporting for more information about reports.