

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.

Home Prospect Summary Sales Summary Salesperson Ranking Source Ranking Lost Sales Summary											
New											
Deal Type	Deal Status	Deal Source	Start Purchase Date	End Purchase Date	Employee						
All	Active		10/01/2015	11/30/2015	All						
<input type="checkbox"/> Advanced Search Clear Filter											
Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Activity	Source	Salesperson	Fin. Mgr.	In Use
11644	Finance	Retail	Miller, Robert			10/28/2015	10/28/2015	Ad	Toto	Araujo	
11635	Finance	Retail	Wilson, Mike			10/22/2015	10/27/2015	Mailer	Sweet	Daugherty	
11642	Finance	Retail	Air Gas			10/27/2015	10/27/2015	Ad	Lawman	Hansson	
11638	Finance	Lease	Adkins, Matt	12312A	2013 LEXUS RX 350	10/27/2015	10/27/2015	Ad	Egbert	Larimer	
11640	Finance	Retail	Jones, Jeff			10/27/2015	10/27/2015	Ad	Toto	Harvey	
11639	Finance	Lease	Shop, Mitch			10/26/2015	10/27/2015	Ad	Shopinsky	Novotniak	
11634	Finance	Retail	Deal, Sweet			10/22/2015	10/26/2015	Ad	Sweet	Hansson	
11637	Finance	Retail	Harmer, Jason			10/23/2015	10/23/2015	Drive By	Harmer	Hansson	
11636	Finance	Retail	Smith, John			10/23/2015	10/23/2015	Ad	Sweet	Daugherty	
11633	Finance	Retail	Miller, Robert	02167C	2014 Chevrolet Cruze	10/22/2015	10/22/2015	Autotrader	Lehman	Larimer	
11631	Working	Retail	Jones, Jeff			10/21/2015	10/22/2015	Ad	Sweet	Harvey	
11630	Finance	Retail	James, Russel	45518N	2015 Nissan FRONTIER S	10/14/2015	10/20/2015	Walk in	Toto	Araujo	
11625	Finance	Lease	Darbunkle, Larry	2223	2015 Chevrolet Tahoe	10/09/2015	10/16/2015	Ad	Simpson	Daugherty	
11629	Finance	Retail	Wilson, Mike		2007 Nissan ALTIM SL	10/14/2015	10/14/2015	Ad	Anthony	Harvey	
11628	Finance	Retail	Thomas, Joe	12312A	2008 Chevrolet Malibu	10/13/2015	10/13/2015	Ad	Anthony	Araujo	
11627	Finance	Retail	Wilkerson, William	02167B	2016 Chevrolet Colorado	10/13/2015	10/13/2015	Ad	Anthony	Novotniak	
11620	Finance	Retail	Smith Towing			10/02/2015	10/02/2015	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.

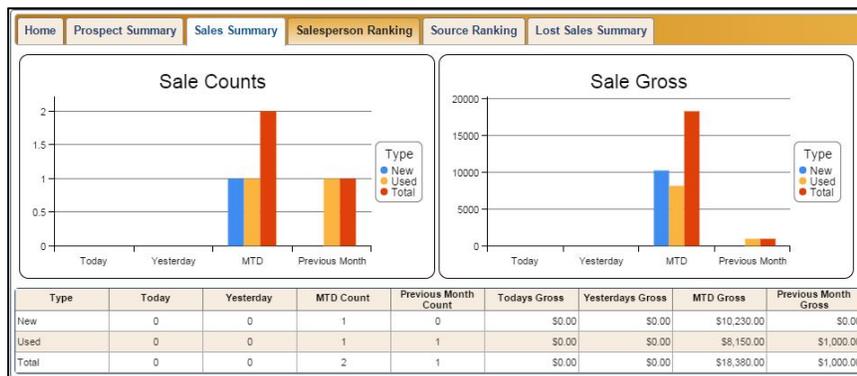
Prospect Summary

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).



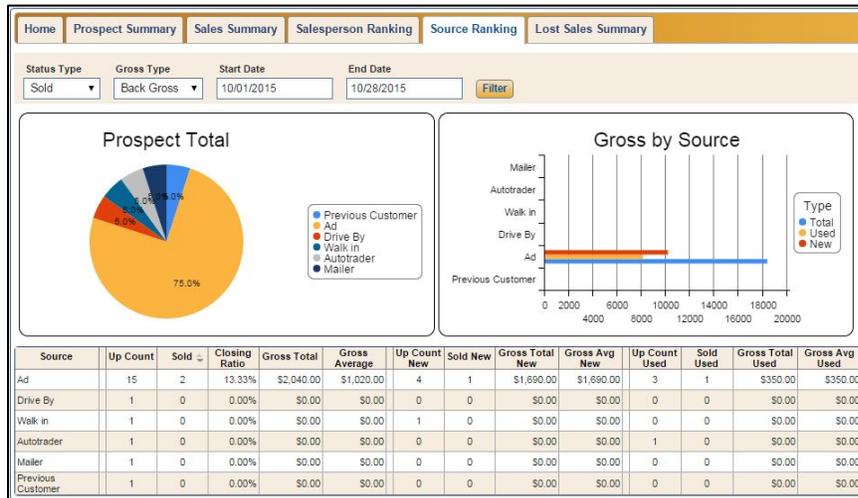
Salesperson Ranking

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 Prospect Summary Sales Summary Salesperson Ranking Source Ranking Lost Sales Summary													
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 Used	Gross Total Used	Gross Avg Used
51	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

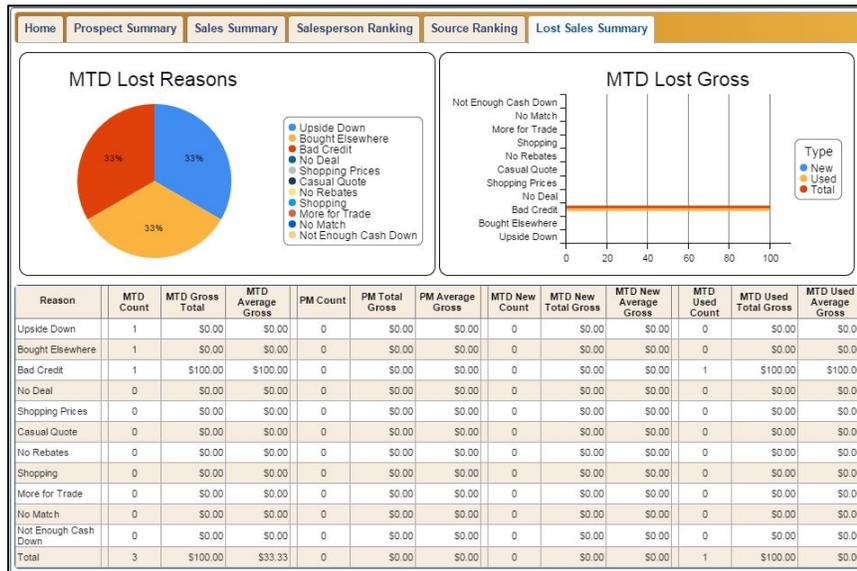
Source Ranking

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.



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.



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.