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.

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.
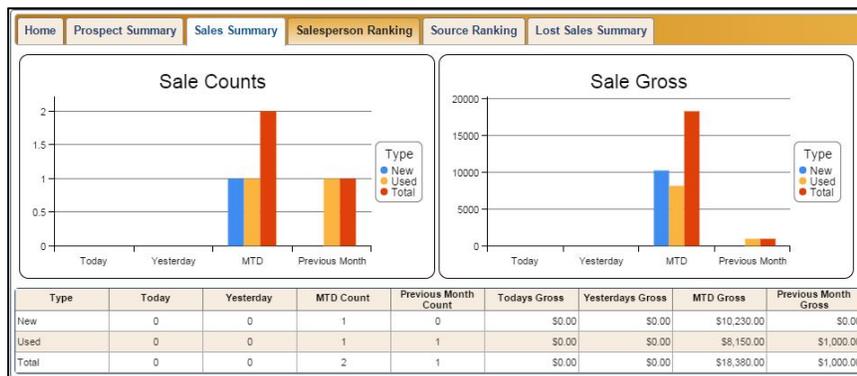
Prospect Summary

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.

Type	Today	Yesterday	MTD Count	Previous MTD Count
Other	1	3	14	8
Walk-In	0	0	3	1
Phone	0	0	3	0
Internet	0	0	1	1
Total	1	3	21	10

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).

| Type	Today	Yesterday	MTD Count	Previous Month Count	Todays Gross	Yesterdays Gross	MTD Gross	Previous Month Gross
New	0	0	1	0	$0.00	$0.00	$10,230.00	$0.00
Used	0	0	1	1	$0.00	$0.00	$8,150.00	$1,000.00
Total	0	0	2	1	$0.00	$0.00	$18,380.00	$1,000.00

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.


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.
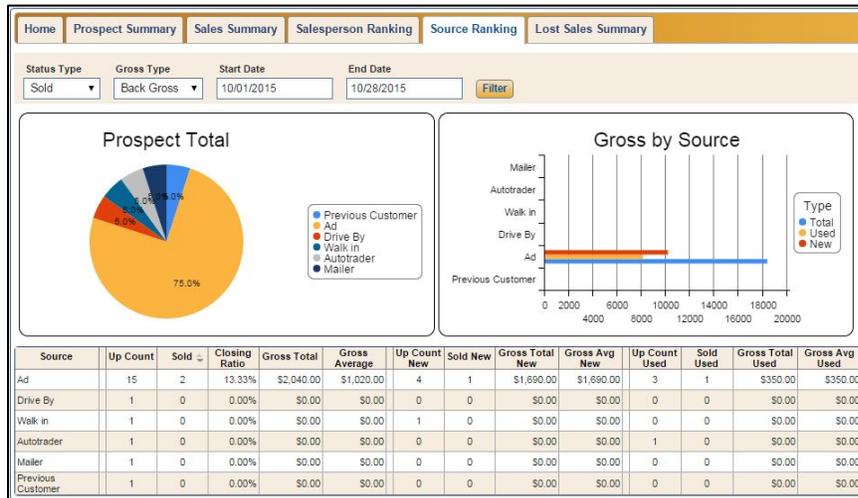
Lost Sale Summary

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.
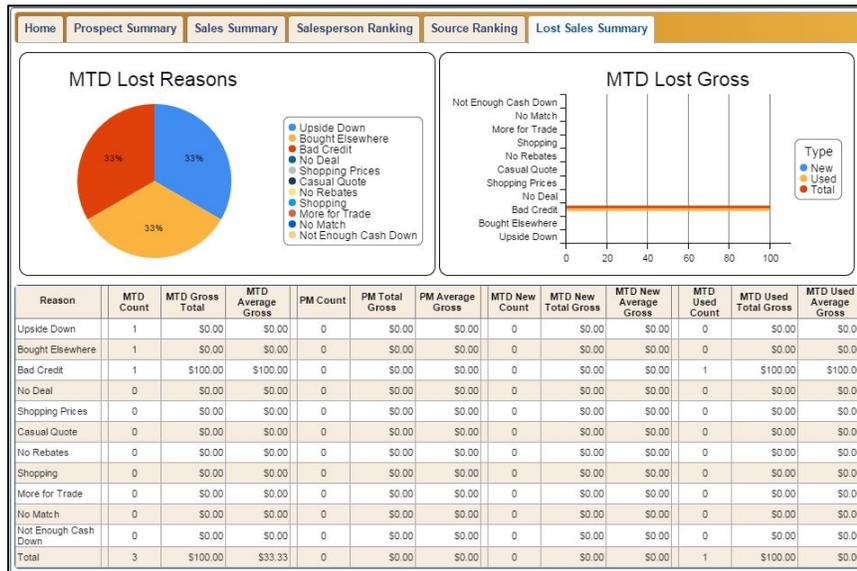
Dashboard Reports

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.