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.

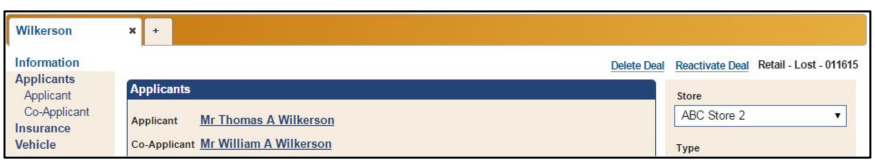
Deleting a Deal

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**.



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**.

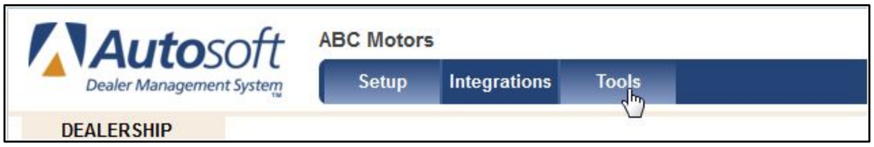
5. You will be returned to the Deals list, from which the deal has been deleted.

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.

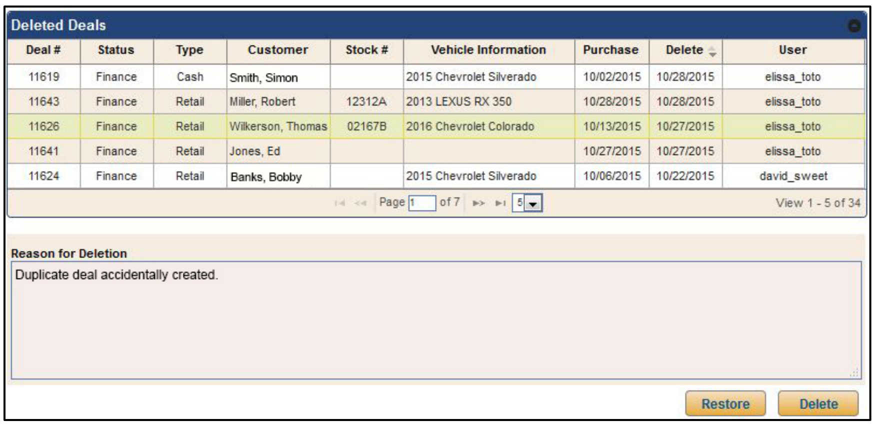
1. Click the **Admin** link.

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.



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.

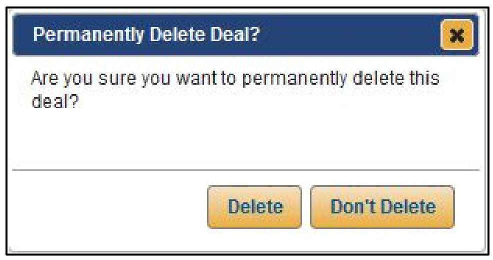
4. Click **Restore**.

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.



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.
3. 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.