

## 01. Deal Management

Please note, DDMs have View Only access to their dealerships' deals. The screenshots and steps below are for an FSM that has access to **Create/Edit/Delete Deals**.

**Note:** HUB will copy deal information for every purchase and for every dealership, regardless of whether the dealership is set up for Performance Monitoring. DDMs can view these deals at any time. The Dealership and User set up only provides access to Deal Management to the dealership users.

### Search Deals

*This section provides supplementary information for the [Performance Monitoring Training Video](#) prepared for FSMs (available on Sales Tools).*

Login to HUB as an FSM, navigate to **Performance Monitoring > Deal Management** page (1).

Use filters to narrow down your **Search** (2).

### Edit Deals

Click on icon (3) on the righthand side of each Deal to open and edit the deal.

### Delete Deals

Click on icon (4) on the righthand side of each Deal to delete the deal.

**Note:** You can only delete a deal if you have created it manually or you have purchased the original quote that created the deal automatically.

Deals are soft-deleted. It means they will stay in the system with a "Deleted" flag. They will not be displayed on the screen. But, you will be able to include/exclude them from the reports.

FSM	Deal #	Reporting Da...	Vehicle Purchase...	Created Date	First Name	Last Name	Dealer Finance Reser...	Dealer Doc/Adm...	Tt...
LGM Training		08 May 2019	Financed	08 May 2019	Tom	Cruise	\$130.00	\$930.00	
LGM Training	12345678	01 Apr 2019	Financed	29 Apr 2019	jane	Tom	\$120.00	\$3,420.00	
LGM Training		05 Apr 2019	Financed	03 Apr 2019	jim	jim	\$120.00	\$3,520.00	
Second FSM LGM Training		05 Apr 2019	Financed	05 Apr 2019	Nancy	Nancy	\$120.00	\$4,919.00	
LGM Training		03 Apr 2019	Financed	03 Apr 2019	Ron	Ron	\$120.00	\$3,399.00	
LGM Training		03 Apr 2019	Financed	03 Apr 2019	john	john	\$120.00	\$170.00	
LGM Training		03 Apr 2019	Financed	03 Apr 2019	test	test	\$120.00	\$4,117.50	

### Need Help?

If you have any questions, please email to [sales@lgm.ca](mailto:sales@lgm.ca)

## Automatically Created Deals

Deals are automatically created under dealership account when a Quote is purchased in HUB.

One Deal is created for all HUB products selected in the purchased Quote.

**Other Products** (OEM or non-OEM) that were on the purchased quote are also included in the deal.

The assumption is these products were also purchased.

**Note:** If FSM creates and purchases multiple quotes for the same VIN multiple deals will be created (one per purchased quote) as Retail Sales. It would be the responsibility of the FSM to edit these deals to After Sales as needed.

The right table shows default values and mandatory and editable attributes of all fields for automatically created deals.

### Automatically Created Deals

<i>Field Name</i>	<i>Default</i>	<i>Mandatory</i>	<i>Editable</i>
Account Name	Dealership Account Name	Yes	No
Created Date	Quote purchased date (when FSM clicked on Purchase)	Yes	No
Deal Number	No default	No	Yes
Deal Type	Retail Sale	Yes	Yes
Financial Services Manager	FSM who Purchased the Quote	Yes	Yes
Sales Manager	No Default	No	Yes
Sales Person	No Default	No	Yes
Customer First Name	Primary Contract Holder First Name from the original Quote	Yes	No
Customer Last Name	Primary Contract Holder Last Name from the original Quote	Yes	No
Business Name	Primary Contract Holder Business Name from the original Quote	No	No
Vehicle Purchase Type	Vehicle Purchase Type from the original Quote	Yes	Yes
Dealer Doc/Admin Fee	Doc/Admin Fee set up in Dealership Profile	No	Yes
Dealer Finance Reserve	No Default	No	Yes
Vehicle New/Used	Determined from the Vehicle	Yes	Yes
VIN	From the original Quote	Yes	No
Year	From the original Quote	Yes	No
Make	From the original Quote	Yes	No
Model & Series	From the original Quote	Yes	No
Additional Vehicle Details	From the original Quote	Yes	No
Stock#	No Default	No	Yes
ISD	From the original Quote	Yes	No
Vehicle Delivery Date	Contract Date from the original Quote	Yes	No
Reporting Date	Quote purchased date (when FSM clicked on Purchase)	Yes	Yes
HUB Products	Dealership Markup for each purchased HUB product from the original Quote	No	No
Other Products	Dealership Markup for each purchased HUB product from the original Quote	No	Yes
Comments	No Default	No	Yes

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## Manually Created Deals

Dealership users who have access to **Performance Monitoring** tool can manually add deals (5).

These deals can only have **Other Products**, OEM or non-OEM (6).

The assumption is if a HUB product was included in the deal, a record has automatically been created for it.

The right table shows default values and mandatory and editable attributes of all fields for manually created deals.

## Created Date vs. Reporting Date

Created Date is the date the deal was entered into the system either automatically or manually.

Reporting Date is the date dealership/FSM would like to report the deal on.

**For example:** If a deal that was entered into the system on **April 1st** should be part of March reporting period, FSM can change the **Reporting Date** to **March 31st**.

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## Deal Type

### Retail Sale

If a deal is identified as a Retail Sale, it is included in the total Deal Count calculation.

### After Sale

These deals are not included in the total Deal Count calculation, but they will be included in total profit calculation.

**Note:** If multiple products are sold for one VIN in multiple Quotes in HUB, multiple Deals of type "Retail Sale" are automatically created. In order to calculate the deal count correctly, user should keep deal type for one of those deals as "Retail Sale" and edit the other to be "After Sale" type.

### Negative Dollar Amount

Other Products only: You can enter a negative amount for Other Products to adjust total profit if needed, e.g. when a dealership is giving the product for free and they still have to pay the dealer cost.

## Manually Created Deals

<i>Field Name</i>	<i>Default</i>	<i>Mandatory</i>	<i>Editable</i>
Account Name	Dealership Account Name	Yes	No
Created Date	Today's date (when FSM adds the deal).	Yes	Yes
Deal Number	No default	No	Yes
Deal Type	After Sale	Yes	Yes
Financial Services Manager	FSM who is adding the deal manually	Yes	Yes
Sales Manager	No Default	No	Yes
Sales Person	No Default	No	Yes
Customer First Name	No Default	Yes	Yes
Customer Last Name	No Default	Yes	Yes
Business Name	No Default	No	Yes
Vehicle Purchase Type	Financed	Yes	Yes
Dealer Doc/Admin Fee	Doc/Admin Fee set up in Dealership Profile	No	Yes
Dealer Finance Reserve	No Default	No	Yes
Vehicle New/Used	New	Yes	Yes
VIN	No Default	Yes	Yes
Year	No Default	Yes	Yes
Make	No Default	Yes	Yes
Model & Series	No Default	Yes	Yes
Additional Vehicle Details	No Default	Yes	Yes
Stock#	No Default	No	Yes
ISD	No Default	Yes	Yes
Vehicle Delivery Date	No Default	Yes	Yes
Reporting Date	Quote purchased date (when FSM clicked on Purchase)	Yes	Yes
HUB Products	Are not displayed on manually created deals.		
Other Products	No Default	No	Yes
Comments	No Default	No	Yes

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