Driven Edge Administration Dashboard Documentation

Version 1.0
Last Updated: April 2025

Table of Contents

Inventory Management

Driven Edge allows you to manage your dealership's inventory either through an automated data feed or manual entry.

Inventory Feeds

If your inventory is imported via a third-party feed (e.g., SureFire), there is no need to contact the Driven Edge development team for setup—these integrations are handled automatically.

Manual Inventory Entry

To manually add vehicles to your inventory:

1. Navigate to **Inventory** using the left-hand menu.
2. Click the **Add Vehicle** button in the top-right corner.
3. Use the **VIN Burst** feature by entering the vehicle's VIN—this will automatically populate many of the key details.
4. Add your **stock number**, **images**, and **descriptions**.
5. Once all details are entered, click **Submit** to save the vehicle to your inventory.

Your newly added vehicle will now appear in the Inventory section within Driven Edge.

Client Management

The **Client List** section in Driven Edge provides a centralized view of all clients associated with your dealership. You can manage, search, edit, and assign clients using a variety of tools designed to streamline your workflow.

Accessing the Client List

- To access the global client list, click **Client List** from the left-hand menu.
- This list displays all clients currently stored in your dealership's system.

Filtering and Searching

- Use the **User Filter** dropdown (top-left) to view clients assigned to specific users.
- To find a specific client, use the **Search** bar in the top-right. You can search by **name**, **phone number**, or **email address**.

Adding a New Client

- Click the **Add Client** button (top-right) to open the **Quick Add** form.
- Enter the essential client information. Once submitted, the **Full Client Details** form will appear, allowing you to add additional data as needed.

Transferring Clients

- The **Transfer Clients** button (next to Add Client) allows you to reassign clients from one user to another—useful when a sales associate leaves the dealership or changes roles.

Exporting Client Data

- The **Export** button (beside Transfer Clients) enables you to download your entire client list in **CSV format** for use with third-party tools such as mailing list platforms.

Client Profiles

- Clicking on a client's name opens their **Client Profile**.
  - Here you'll find all stored client details, communication history, sales quotes, and completed sales.
  - The **Assigned** column shows which user is currently responsible for the client. You can click on this field to reassign the client to another sales associate.

Editing and Deleting Clients

- Click the **Edit** button to open the full client details form, where you can update any necessary fields.
- Use the **Delete** button to permanently remove a client from the global client database.

Merging Duplicate Clients

- If you identify duplicate client profiles, you can select them and click the **Merge** button (top-right) to combine the entries into a single, unified client record.

Let me know if you want me to create a full documentation template you can use across your platform, or if you'd like visual cues or icons added for buttons and actions.

Lead Management – Current Leads

The **Current Leads** section allows your dealership to efficiently manage and route incoming leads from multiple sources. Whether leads are generated by third-party platforms or entered manually, Driven Edge ensures a smooth intake and assignment process.

Accessing the Current Leads Section

- Click **Current Leads** from the left-hand menu to view all incoming leads.

Lead Sources

- Leads may be received automatically via **ADF XML** from third-party providers or through the **Driven Edge Lead API Endpoint**.
- You can also add leads manually by clicking the **Add Lead** button in the top-right corner.

Adding a Lead Manually

- When entering a new lead, you can specify whether the lead is:
    - **Interested in Purchasing**
    - **Interested in Trading**
    - Or **Both**

Lead Review and Assignment

- Once a lead is received (automatically or manually), a **Sales Manager** can click the **View** button to review its details.
- If the lead appears legitimate, it can be **assigned to a sales associate**.
- Assigned leads will then appear on the associate's dashboard under the **New Leads** section for follow-up.

Rejecting Leads

- If a lead is determined to be invalid or spam, a Sales Manager can **reject** it. This helps ensure the dealership is not charged for unqualified or fake leads.

Assigned Leads

- Once assigned, leads are moved to the **Assigned Leads** page.
- Here, Sales Managers can:
    - Monitor response times.
    - Ensure the lead has been contacted.
    - Add additional details.
    - Reassign the lead to another team member if necessary.

Lead Notification Settings

- In the top-left corner, click the **Settings** icon to configure lead notification preferences.
- From this section, you can choose which users should receive **email notifications** whenever a new lead arrives—ensuring your team is alerted in real time, 24/7.

Lead Tracker

The **Lead Tracker** is a comprehensive tool designed for Sales Managers to monitor, manage, and evaluate lead activity across the entire dealership. It consolidates lead data into a single, actionable dashboard for efficient oversight and performance tracking.

Accessing the Lead Tracker

- Click **Lead Tracker** in the left-hand navigation menu to open the lead tracking dashboard.

Overview Dashboard

- The main Lead Tracker page displays all recent leads with a concise summary of each.
- The lead table includes:
  - **Assigned time**
  - **Assigned sales associate**
  - **Communication history** (calls, emails, texts)
  - **Actions** such as appointments, test drives, quotes, and completed sales

This allows Sales Managers to quickly assess the status of each lead and follow up with team members as needed.

Client and Lead Details

- Click the **client's name** to open their **Client Profile**, where you can view full contact information and communication history.

- Click the **Details** link to view the original lead submission data in a modal window.

Lead Interaction Icons

- The tracker uses icons to represent key actions:
    - **Appointment**, **Show**, **Test Drive**, **Quote**, and **Sale**
    - When an action occurs, its corresponding icon turns **red**, indicating activity.
    - Clicking a red icon opens a modal with additional details.
- A **Notes** icon allows Sales Managers to leave notes for the assigned associate. When used, it appears red in the associate's CRM for visibility and response.

Filtering and Searching

- Use the **search bar** (top-left) to find leads by client name or contact details.
- Use the **User Filter** dropdown to view leads assigned to a specific team member.
- A **Lead Status Filter** below the search bar allows you to categorize and view leads by priority (e.g., Hot, Warm, Cold).

All Leads and Bulk Transfer

- The **All Leads** button (top-center) opens a detailed page containing every lead ever received by the dealership—ideal for historical performance reviews.
- The **Bulk Transfer** button allows you to reassign multiple leads at once, especially helpful when a sales associate has left the organization.

KPI Tracking

- The **KPI (Key Performance Indicator)** button (top-right) opens a dashboard showing team performance against dealership goals.
- For example, you might set a goal of 20 prospecting calls per associate per week.
- Clicking an associate's name reveals their individual KPI statistics.

Appointments and Reports

- The **Appointments** button offers a quick snapshot of upcoming appointments—mirroring the calendar view from the Admin Sales Dashboard.

- The **Reports** button opens the **Leads Report** section, which breaks down lead performance by source, giving insight into which lead providers are delivering the most value.

Let me know if you'd like this formatted into a branded documentation template, or if you'd like help building matching sections for other modules like Reporting, Appointments, CRM, or Settings.

Deal Builder

The **Deal Builder** serves as the default Administration Dashboard and can also be accessed via the **"Deal Builder"** link in the left-hand navigation menu.

Dashboard Overview

The top of the Deal Builder page presents a summary of key monthly performance metrics:

- **Appointments**
- **Quotes**
- **Written Deals**

This gives Sales Managers a high-level view of how the dealership is performing in real time.

Monthly Calendar

Beneath the summary, a monthly calendar displays all scheduled appointments in **red**. Daily appointments appear on the right side of the screen.

Appointments are typically booked by Sales Associates through the CRM, but you can also manually create one in Deal Builder:

- Click the **"Add Appointment"** button (top-right of the appointment list)
- A modal will appear, allowing you to enter appointment details and assign it to a Sales Associate

Lead Insights

Below the calendar, you'll find:

- **New Leads**: Incoming leads for immediate attention
- **Hot Leads**: High-priority leads with frequent activity

These sections help managers ensure that associates are properly engaging with leads and driving them through the sales funnel.

Monthly Sales Graph

A visual comparison of monthly dealership sales year-over-year is shown next. This provides a quick snapshot of performance trends.

Sales Leaderboard & KPIs

The **Sales Leaderboard** highlights top-performing associates and identifies those who may need additional support. Below it, you'll find **KPI Results** for deeper insights into individual sales activities.

Creating a New Deal

To begin a new deal:

1. Click the **"New Deal"** button at the top right of the Deal Builder page.
2. The **Start New Deal** form will open.

Applicant Selection

- Start typing a client's name to select them as the applicant and optional co-applicant.
- Once selected, click **"Next"**.

Vehicle Selection

- Choose a vehicle from inventory by typing the vehicle name or selecting a previously quoted vehicle.

Package Selection

You'll then reach the **Option Package** screen:

- Present up to three customizable packages (e.g., Bronze, Silver, Gold) with products and insurances.

- Select the default (highlighted in blue), and the **Desking Sheet** will load.

Desking Sheet Overview

At the top:

- **Deal ID**, **Date**, and the **VW&P** (Vehicle Wholesale & Profit) toggle
  - Use this to view or hide profit details during customer-facing sessions

Key sections include:

Client Details

- Update client info on-the-fly via the **Client Details** link.

Vehicle Information

- Easily swap the selected vehicle using the **Vehicle Information** link.

Trade Information

- Add a trade using the **Trade Information** link
  - Start with a **VIN Burst** to autofill details
  - Enter value, lien info, etc., and click **Update**

Payments & Financing

The system auto-calculates payments based on:

- Selected package
- Terms
- Interest rates

You can update the entire row's default values using the **cylinder icon** on the Payment Card.

Package Options Management

- Click **"Add/Remove Options"** on the selected package to customize individual add-ons
- Payments update dynamically with each change

Vehicle Pricing Column

This section includes:

- **Base Price** (from DMS or Edge)
- **Pre-tax Adjustments** (discounts)
- **Trade Allowance** and **Lien Payout**
- **Tax Details** (automatically loaded, but editable)

Down Payment

- Enter a down payment and click **Update** to refresh payment cards.

Additional Tools & Features

- **Notes Section**: Add reference notes for future review
- **Options Breakdown**: Toggle to show/hide option pricing details
- **Option Discount**: Apply discounts on optional add-ons
- **Bank Fee**, **PPSA**, and **License Fee** fields
- **Custom Options**: Add unique dealership-specific items (e.g., fuel charges, extended warranty)

Closing the Deal

Once the client agrees on a payment and term:

1. Click the desired **Payment Card** under the selected package
2. A **Liability Review Modal** appears—offering a final opportunity to upsell additional products (priced per day for transparency)

If the customer agrees:

- Background calculations update automatically

Click **Continue**, and the deal is marked as **"Written/Sold"** in Edge.

Final Steps

Two tabs will open:

- **Declined Products Form** (for litigation protection)
- **Deal Summary**

The Finance Manager can then:

- Review the summary
- Select a bank (optional)
- Set the reserve amount
- Assign themselves as the Finance Manager

Finally, click **"Record Deal"** to complete the process. The deal is officially logged, and the vehicle is marked as **Sold** in the inventory.

At the top-right of the Deal Builder dashboard, beside the **"New Deal"** button, are two powerful deal tracking tools:

Quotes Button

Clicking the **"Quotes"** button opens the **Current Quotes Page**. By default, it shows quotes from the current month, but you can adjust the view using:

- **Date Range Filter** (top-right)
- **Search Field** (search by customer name)

- **Sales Associate Filter** (dropdown, top-left)

Quote Types & Status Icons

Edge supports quoting vehicles in various stages—even vehicles that are already sold or not in inventory yet. A **Legend** explains quote statuses:

- **Quote**: A draft quote, including fictional vehicles
- **Written**: A deal that's been desked and accepted but not yet delivered
- **Delivered**: A vehicle fully delivered and removed from inventory

Each quote entry shows:

- Deal number
- Timestamp
- Core details
- Action buttons:
  - **Desking**: Reopen the Desking Sheet to continue working
  - **Cancel**: Discard a test or incorrect quote
  - **Lock**: Prevent others from editing the deal settings

Sold Button

The **"Sold"** button opens the **Written/Closed Deals Page**, which includes:

- The same **Search**, **Date Range**, and **Sales Associate Filters** as the Quotes section
- A list of finalized deals with:
  - **Deal Number**
  - Timestamp
  - Status
  - Action buttons:
    - **BOS/Surefire**: Access the Bill of Sale or send deal info to Surefire DMS (based on system settings)
    - **Restore**: Revert the deal back to a quote for edits or corrections
    - **Details Toggle**: Expand to show additional deal information

Deal Tracker

The **Deal Tracker** is a comprehensive tool within Driven Edge designed to manage the entire post-deal workflow—from the moment a vehicle is marked as *Written* to final *Delivery*. It enables collaboration across all key dealership roles, including Sales Associates, Sales Managers, Finance Managers, and Service Managers.

Accessing the Deal Tracker

To open the Deal Tracker, click **Deal Tracker** from the left-hand navigation menu. This will open the Deal Tracker Dashboard, which is divided into two primary lists:

- **Written Deals**: Vehicles currently in progress and moving toward delivery.
- **Delivered Vehicles**: Vehicles successfully delivered within the selected date range.

Once a deal is marked as "Written" in Deal Builder, it automatically appears in the **Written** section—alerting all relevant team members that a new vehicle requires attention.

Written Deals Overview

Each row in the **Written Deals** list displays:

- **Date Written** (from Deal Builder)
- **Dealership Location** (for multi-location dealerships)
- **Client Name** (clickable to open client details modal)
- **Stock Number** (clickable to view vehicle info)
- **Make** (clickable to toggle deal summary details)
- **Model**
- **Sales Associate** (editable)
- **Sales Manager** (editable)
- **Finance Manager** (editable)

Status & Communication Columns

The next set of columns are crucial for moving a vehicle to delivery:

Status

Tracks financing progress. Clicking this field opens a modal where users can update the financing stage:

- Credit Pending
- Docs Sent
- Issue
- Cash Pending
- Approved
- Funded

This modal also includes the **Bank Reserve**, pulled from the Deal Builder desking sheet, which can be updated as needed.

Bank Notes

Used for entering financing feedback or internal notes. Clicking the field opens a modal with a text input and displays all previous notes.

Note: Bank Notes are required to move the deal to *Delivered*. Even if there are no updates, a note such as "No applicable notes" must be entered. Once notes are added, the column will display “Yes” in red.

Delivery

Indicates the scheduled delivery date.

Click to open a modal and choose a delivery date. The column changes color based on delivery status:

- **Blue**: Delivery scheduled
- **Gold**: Delivery due today
- **Red**: Delivery overdue

Service Notes

Facilitates communication between sales and service departments. Notes can be added to detail any work needed prior to delivery. Once service is complete, the **Service Manager** must check the **Service Complete** box.

Vehicles **cannot be marked as Delivered** unless service is marked complete.

Once complete, the column will turn green and show "Complete."

Marking a Vehicle as Delivered

A vehicle is eligible for delivery when the following are true:

- **Status** is set to *Funded*
- **Bank Notes** are marked *Yes*
- **Service** is marked *Complete*

To deliver the vehicle:

1. Click the **Delivery** link to reopen the modal.
2. Click the **Delivered** button.
3. The vehicle will now move to the **Delivered Vehicles** list.

Filtering and Sorting

Both Written and Delivered lists support filtering by:

- **Sales Associate**
- **Sales Manager**
- **Vehicle Type**

The **Delivered List** also includes a **Date Range Selector** for filtering by custom time periods.

Tracker Reports

At the top of the Deal Tracker is a **Reports** button (visible only to users with the proper role permissions). This opens the main reporting view, which includes:

Sales Report (Summary View)

Displays dealership performance metrics for the current month:

- Front-end and back-end gross
- Base prices
- Discounts
- Options sold (clickable for more details)
- Profitability snapshot

Detailed Sales Report

Breaks down each individual sale during the selected date range. Features include:

- Drill-down by **Stock Number** (reveals vehicle details and pricing)
- Expandable **Options** pricing for cost/profit breakdowns

The report section includes robust **filters** for drilling down by:

- Date range
- Associate
- Deal status
- Vehicle type

Additional Tools

Next to the **Reports** button are two more tools:

Refresh Button

Manually refreshes the Written and Delivered lists.

Audit Trail

Tracks all changes made by users—allowing managers to review updates or correct errors when necessary.

Let me know if you'd like this styled for your docs page, added to your table of contents, or exported to Markdown or HTML for easy integration!

Reports

The **Reports** section in Driven Edge provides dealership-specific reporting tools designed to support compliance and operational insights. If your dealership requires a custom report that is not currently available in Edge, we are happy to build one upon request.

Accessing Reports

To access the Reports section, click on **"Reports"** in the left-hand navigation menu, located beneath the **Deal Tracker**.

Current Available Report: OMVIC Report

At present, Edge offers an **OMVIC Report** for dealerships located in Ontario, Canada, ensuring compliance with local regulations.

To generate the OMVIC report:

1. Select the desired **date range** at the top of the report.
2. Click the **Print** button (top right) to produce a hard copy.
3. Or, click the **Download CSV** button to export the report as a spreadsheet for digital use or archiving.

User Settings

The **User Settings** section allows administrators to manage user accounts within the Edge platform. From this dashboard, admins can add new users, edit existing accounts, or deactivate users when necessary.

Accessing User Settings

To open the User Settings page, click the **"User Settings"** link in the left-hand navigation menu.

Adding a New User

To add a new user:

1. **Complete the Add User Form**
   Enter the user's basic information, including their name, address, and other relevant contact details.
2. **Select Dealership Location**
   If your company operates multiple dealerships, choose the specific location the user will be associated with.
3. **Enter Email and Temporary Password**
   Provide the user's email address and assign a temporary password. On first login, the user will be prompted to create a secure password of their own.
4. **Assign Access Role**
   Select the appropriate **user role** based on the employee's position. This determines their default dashboard and what features they can access.
5. **Optional Fields**
   a. **Registration Number** (if required by your state or province)
   b. **Twilio Number**, if you're using Edge's Twilio SMS integration
6. **Submit**
   Click **"Submit"** to add the user to your dealership's account.

Editing an Existing User

To edit a user:

- Locate the user in the list and click the **"Edit"** button on the right.
- The user's information will populate the form, allowing you to update any necessary details.
- Click **"Update"** to save your changes.

Deactivating a User

To deactivate a user:

- Click **"Edit"** next to the user you want to deactivate.
- Scroll to the bottom of the form and click the red **"Deactivate"** button next to the update option.

- The user will immediately be removed from active status and will no longer have access to the system.

Adjusting Role Settings

To configure user roles:

1. Click the **“User Roles”** button in the top-right corner of the Users page.
2. A list of all user roles will appear.
3. For each role, you can check or uncheck features to grant or restrict access.
    a. **Checked** = Feature is enabled for that role
    b. **Unchecked** = Feature is hidden from that role

This feature allows for granular control over what different team members can see and do within Edge.

Dealer Settings

The **Dealer Settings** section allows you to add new dealerships or update existing dealership information. You can access this section by clicking the **“Dealer Settings”** link in the left-hand navigation menu.

Adding a New Dealership

To add a new dealership:

1. **Complete the Add Dealership Form:**
   a. Enter the **Dealership Name** and a shorter **Alias Name** to help identify different locations within your company.
2. **Address Details:**
   a. Provide the full address of the dealership, including street, city, province/state, and postal/ZIP code.
3. **Tax and Registration Information:**
   a. Enter the dealership's **Tax Number** and **Registration Number** if required by your state or province.
4. **Set Default Taxes:**
   a. Input the default tax rates for the dealership's location.
   b. You may use two separate tax fields for regions with federal and provincial/state tax, or a single combined tax field if applicable.

Once all required fields are completed, click the **“Add Dealership”** button to add the dealership to your company profile.

Editing an Existing Dealership

To update a dealership’s information:

1. Locate the dealership in the list.
2. Click the red **“Edit”** button to the right of the dealership entry.
3. The dealership form will populate with the current information.
4. Make the necessary updates.
5. Click **“Update Dealership”** to save your changes.

Global Settings

The **Global Settings** section allows administrators to configure settings that apply across all dealerships within your organization. To access this section, click on **“Global Settings”** in the left-hand menu, located under the **Dealer Settings** tab.

Global Settings consists of several expandable sections. Click on each section title to view and configure the corresponding settings.

1. Global Tax Settings

In this section, you can define the various taxes applicable to your dealership(s). To add a tax, simply enter the **tax name** and **percentage**, then click **“Add Tax”**. These taxes will be available across your dealership’s deal workflows.

2. Global Bank List

Here, you can maintain a list of banks your dealerships work with. Adding banks enables finance managers to select them when working in the **Deal Builder Pricing Sheet**, **Deal Tracker**, and the **Bill of Sale** section (if using Edge’s integrated solution). Click the section title to expand and add bank names to the global list.

3. Deal Builder Products

This section allows you to configure the structure and content of the Deal Builder Pricing Sheet.

- **Categories**
  Start by adding your primary pricing categories—commonly used examples include **Bronze**, **Silver**, and **Gold**, or custom groupings such as **Essential**, **Preferred**, and **Ultimate**. These will appear as column headers on the Deal Builder Pricing Sheet.
- **Subcategories**
  Create subcategories such as **Insurance**, **Add-ons**, etc. For each subcategory, you can specify how products should appear on the **Liability Sheet**. For example, high-value items like insurance are typically set to display only premium options by default.
- **Products**
  Add individual products by entering the product name, description, wholesale price, and retail price. Click **"Add Product"** to include it in your global list. Products can be edited or deactivated at any time. You can also choose whether a product appears on the **Liability Form** using a simple checkbox toggle.

4. Deal Builder Settings

Click this section to configure default settings for the Deal Builder tool:

- **Default Interest Rate and Terms**
  Set the default interest rate and loan terms (Term 1, Term 2, Term 3) that will appear when the Deal Builder Pricing Sheet is opened. These defaults serve as starting points and can be adjusted per deal.
- **Category Layout**
  Define which categories appear in each column of the pricing sheet (e.g., Column 1: Bronze, Column 2: Silver, Column 3: Gold).
- **Category Product Assignment**
  Assign products to each pricing category. For example, under **Bronze**, you might include a basic warranty, insurance package, and specialty item. These pre-set combinations help streamline the deal-building process.

5. KPI Settings

Set and manage sales performance goals for your team:

- Click **“KPI Settings”** to access this section.
- Use the dropdown menu to select a sales associate.
- Enter their KPI goals and click **“Update Goals”** to save.
- Repeat the process for each associate.

6. Inventory Settings

This section is typically configured by the Edge support team. Here, third-party inventory feeds (e.g., Surefire) can be integrated if your dealership chooses to use an external inventory management system instead of Edge's built-in solution.

7. Bill of Sale Settings

Admins can choose which **Bill of Sale** tool to use. You can select between Edge’s integrated Bill of Sale or connect a third-party provider (such as Surefire). For third-party integration, please contact Edge support for setup assistance.

8. Timezone Settings

Use this section to set the appropriate **timezone** for your dealership, ensuring accurate time-stamping across all platform features.

9. Twilio Integration

If your dealership opts to use **Twilio** for SMS communication, you can configure it here. This integration must be set up with assistance from Edge support.