Driven Edge User Manual

Sales Dashboard Features & Workflow

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Sales View Dashboard Overview

The **Sales View Dashboard** serves as a powerful and streamlined CRM designed specifically for the sales associates at your dealership. This focused dashboard provides everything your team needs to manage leads, initiate client communications, close deals, and track progress from the "Written" stage through to final vehicle delivery.

My Dashboard

Upon logging in, sales associates are greeted with a personalized dashboard displaying key daily information and performance metrics.

Monthly Performance Cards

At the top of the dashboard, three summary cards present an overview of the associate's performance for the current month:

- **Appointments**: Total number of client appointments set.
- **Written**: Number of deals written (i.e., vehicle sales recorded).
- **Delivered**: Number of written deals that have successfully passed financing and resulted in vehicle delivery.

These metrics offer an immediate snapshot of the associate's monthly achievements.

Activity Log

Directly below the performance cards is the **Activity Log**, which tracks daily communication efforts. It is divided into:

- **Calls**
- **Texts**
- **Emails**

Sales associates can log their outreach by selecting the appropriate action (e.g., "Add Call"). A modal will appear where they can begin typing a client's name—after three letters, a list of matching contacts will appear. Once the client is selected, the associate can enter relevant comments in the text area. This same process applies to text messages and emails. All communication is stored in the client's profile for easy future reference.

Lead Tabs

Beneath the activity section is a tabbed interface displaying the associate's lead pipeline. The tabs include:

1. **New Leads** – Leads newly assigned to the associate or self-created leads that have not yet received any communication or registered actions (e.g., appointment, test drive).
2. **Today's Contacts** – Leads that have been contacted on the current day, allowing associates to ensure consistent daily follow-up.
3. **Hot Leads** – Leads with interactions or actions recorded within the past 7 days. These are considered highly active and should be prioritized.
4. **Cool Leads** – Leads with recorded activity within the past 30 days. These require attention once all hot leads are followed up.
5. **All Leads** – Opens the full **Lead Report** page, where associates can view their entire lead history using flexible filters and date ranges.

Lead Report Tools

The **Lead Report** includes:

- **Date Range Selectors** – Allows users to narrow or expand the time frame of leads displayed.
- **Stage Filter** – Enables filtering by stages such as "Test Drive," "Appointment Set," etc.
- **Search Bar** – Located in the top-left corner, this allows associates to search for specific clients by name.

These tools help sales associates pinpoint motivated buyers and tailor their follow-up strategies accordingly.

Calendar & Daily Task List

Below the leads section is the **Calendar** and **Daily Task List**.

- The calendar shows a red notification badge on days with scheduled tasks.
- Clicking on a day reveals that day's appointments and tasks.

Adding an Appointment or Task

To add a task:

1. Select the task type from the **"Add a Task"** dropdown (e.g., Appointment, Test Drive, or a general task).
2. A modal will appear where the associate can:
    a. Choose a client (required)
    b. Select a vehicle (optional)
    c. Enter a task description
    d. Set a time range
3. Click **"Add"** to save the task.

Tasks appear both on the calendar and in the list below.

Managing Tasks

Each scheduled task appears as a clickable blue hyperlink in the task list. Associates can:

- **View Details** – By clicking the task name
- **Edit** – Via the **Edit** button
- **Delete** – Using the **Delete** link
- **Start Task** – Click **Start**, which activates a blue blinking indicator visible to managers
- **End Task** – Click **End**, which opens a modal to record task outcomes

Once submitted, results are logged in the client's profile and linked to their lead history.

Monthly Leaderboard

At the bottom of the dashboard is the **Monthly Leaderboard**, showcasing the dealership's top-performing associates. It displays:

- Total Sales Amount
- Number of Deals Written
- Number of Vehicles Delivered

This real-time performance tracker helps motivate the sales team and fosters healthy competition.

New Lead

One of the most frequently used features in the sales dashboard is the **“New Lead”** button, located above the monthly results section. This function allows users to manually add new leads, such as when a client visits the dealership in person or a sales associate receives a positive response from cold calling or other outreach efforts.

If the client already exists in Edge, clicking the **“New Lead”** button will open a modal window where you can search for the client by name. As you type, a list of matching client options will appear. Once you've identified the correct client, click the **“Add”** button next to their name. This will auto-fill the client's details and provide a text area for entering lead-specific information.

After entering the lead details, click **“Add”** to submit. The lead will then be added to your active lead flow.

Add Client

To manually add a client in the Sales Dashboard, click the **Add Client** button located next to the **New Lead** button. This will open a modal window containing a form where you can enter the client's details.

Fill in the client's name and contact information. At the bottom of the form, there is a text area labeled **Lead Details**. Since most new clients are also leads, this section allows you to input relevant information at the time of client creation—eliminating the need to add a separate lead afterward.

If the client is not a lead, simply uncheck the **Create Lead** checkbox. Once all client information is complete, click the **Save** button. This will add the client to the Edge database and, if applicable, automatically include them in the lead workflow.

My Clients

Next to the **Add Client** button is the **My Clients** button. Clicking this button displays a curated list of clients assigned specifically to you. This focused list makes it easy to stay engaged with your clients and follow up with them regularly.

When the client list opens, you'll find an alphabetical filter dropdown in the top-left corner. This allows you to quickly narrow the list by letter for easier browsing.

On the top-right side of the interface, there is a **Search** text box. You can use this field to quickly locate a client by typing just a few characters of their name.

In the list, each client's name is clickable. Clicking a name opens the full **Customer Profile**, which contains all client details—including contact information, communication history, active and past leads, and their complete sales history.

To the right of each client in the list are several action buttons:

- **Comms**: Opens a modal displaying the client's communication history. This allows you to quickly review past interactions and get up to speed.
- **Notes**: Opens a modal containing notes made by you or other team members, including management.
- **Lead Notes**: Opens a modal showing notes related to the client's leads, which may include input from sales associates, managers, or third-party lead providers.

This tool streamlines client management by consolidating all relevant information and actions in one convenient location.

KPI – Key Performance Indicator

Located next to the **My Clients** button is the **KPI** button. This stands for **Key Performance Indicator**.

Clicking this button will take you to the KPI page, which tracks your sales activities automatically within Edge. Each time you make a call, send a text, or log an activity, the system will automatically update your KPI metrics to reflect your efforts.

KPI goals are established by your Sales Manager in the **Administration Dashboard**. The KPI interface is divided into two sections:

- **Activities**: Displays the actions you've completed (calls, texts, etc.).
- **Results Table**: Shows your current performance metrics in comparison to your goals.

For more information or to have your KPI goals set, please contact your Sales Manager.