Deals

The **Deals** screen is designed to allow your sales team to keep tabs on in-progress sales, and identify process bottlenecks where your sales method could use improvement.

How to Use the Deals Screen

1. Open the **Deals** screen using the menu on the left side of the screen.
    a. The default *Pipeline* displays with all in-process deals.
2. Add a new lead:
    a. Select the blue Plus Sign to open the New Deal drawer.
    b. Enter *Lead Source*, *Customer* (or add new), *Notes*, *Title*, and *Amount*.
    c. Choose the correct *Pipeline* and assign a *User*.
    d. Select Save to add the Deal to the first column ("New Lead" or similar).
3. View the **Deals**:
    a. Each Deal card includes the *Title*, *Customer*, Number of scheduled Tasks, and assigned *User*, the Deal *Value* (in green), and how many days the Deal has been in its current *Stage* (in red).
    b. The blue Filter button in the top right corner allows you to narrow your display by assigned user, Deal *Age*, and *Status*.
4. Work the **Deals**:
    a. As Deals move through the process, drag-and-drop the Deal card into the correct *Stage*.
    b. Open the Deal drawer by selecting the Deal *Title* on the card.
        i. The *Title*, *Value*, current *Stage*, *Pipeline*, and days in each *Stage* display.
        ii. In the left column the *Description*, *Customer Contacts*, and *Assignment* can be edited. The Archive button will save this deal, but take it out of active use.
        iii. The *Products* section can attach details for the prospective sale, including *Condition*, *Year*, *Make*, *Model*, *VIN/Serial No*, *Stock Number*, *Description*, and *Price*.
        iv. The right column includes *Notes*, and a Deal history timeline. The Task tab allows assigning Tasks related to this deal, including the *Subject*, *Task Type*, *Assignment*, *Due Date*, due *Time*, and *Notes*. These are added to the timeline, and the deal is updated as Tasks are completed.
        v. Select the Save button to save your changes.
5. Close the **Deals**:
    a. Once a Deal is finished, reopen the Deal drawer and select:
        i. Won: If the Deal is closed, and the purchase is complete.
        ii. Lost: If unable to complete an agreement for purchase.
            1. Lost sales require additional note entry explaining the situation.
        iii. The Archive Scheduled Tasks slider appears for both outcomes, and allows you to archive any open Tasks that might be outstanding for this Deal.

Tasks

The **Tasks** screen works seamlessly with any in-progress **Deals** and helps to ensure that duties are assigned to the right people, and completed on time.

How to Assign New Tasks

1. When you need to assign a **Task,** you can do so from within the **Deals** tool (See our handout on **Deals**!) or, you can navigate to the **Tasks** screen using the menu on the left side of the screen.
    a. By default, all **Tasks** assigned to your user display, sorted by date and time *Due*.
2. Select the blue Plus Sign button in the top left corner of the screen.
    a. The New Task drawer opens. Enter the details about your **Task**:
        i. *Subject*: What is this **Task** called?
        ii. *Select Customer*: Which customer record is this **Task** for?
        iii. *Assignment*: Which user will be doing this **Task**?
        iv. *Due Date*: What day is this **Task** due?
        v. *Time*: What day is this **Task** due?
        vi. *Task Type*: What category is this **Task**?
        vii. *Notes*: Add details for reference.
    b. The *Already Completed* slider will mark a **Task** as something that is already finished.
3. Select the Save button to save your **Task**.

How to Edit and Complete Tasks

1. Navigate to the **Tasks** screen using the menu on the left side of the screen.
    a. By default, all **Tasks** assigned to your user display, sorted by date and time *Due*.
    b. Your **Tasks** display their *Subject*, *Type*, *Customer*, *Deal*, *Due*, *Assignment*, and *Location*.
    c. The date will display in red if overdue.
2. Select your task *Subject*.
    a. The Task Details drawer opens. Select the Edit button to make changes to the *Subject*, *Task Status*, *Customer*, *Assignment*, *Due*, *Task Type*, and *Notes*.
        i. Select the Save button to save your changes.
    b. Select the Done button to mark your **Task** complete.
        i. Enter the **Task** *Outcome* and *Notes*.
        ii. Use the *Follow-Up Task* slider to create a follow-up task.
        iii. Select the Save button to save your changes.
3. The Edit and Done buttons may also be selected from the **Tasks** screen.