

01. Reports in the HUB

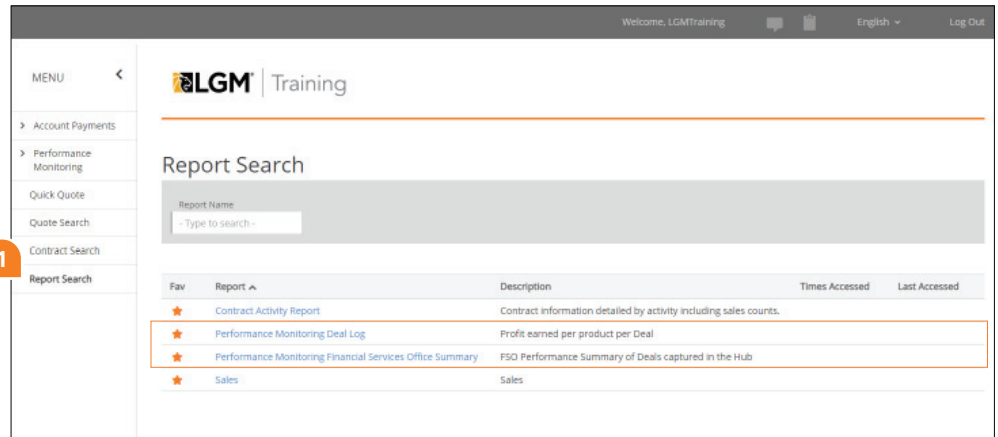
In addition to the Dashboard, the following HUB reports are also available to the Performance Monitoring users.

Performance Monitoring Deal Log

Performance Monitoring Financial Services Office Summary

Access these reports via **Reports > Report Search** menu option (1).

All users with access to the Performance Monitoring menu item will have access to these reports.



Performance Monitoring Deal Log

This Excel-based report provides Profit earned for each product at the individual deal level during the indicated Reporting Date period.

This is a real-time report, and includes all data up to the time user runs the report (no delay in including deals).

Filters (2)

There are a number of filter options, that you are able to modify, that will allow flexibility in the data generated:

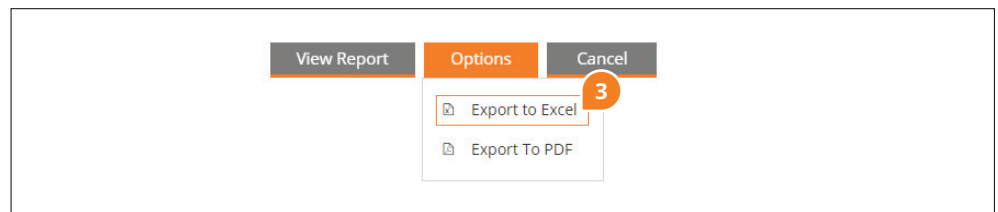
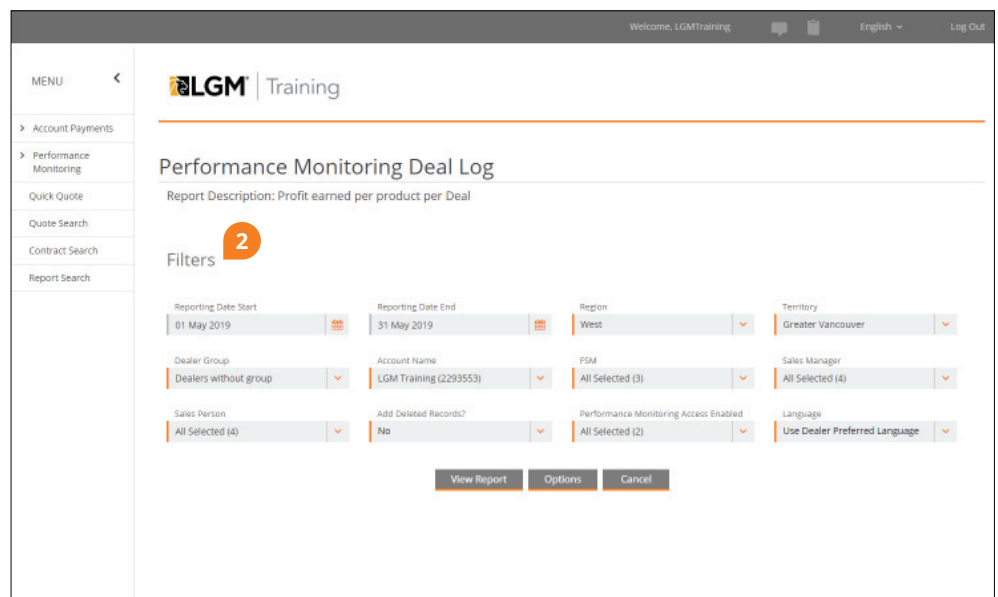
Reporting Date Start & Reporting Date End – this filter allows you to any date range and the report will generate deal information based on the Reporting Date entered in the Deal entry interface.

FSM – this will list the Financial Services Managers at your dealership that are associated to Deal Records. It is a multi-select filter where a minimum of one selection is mandatory.

Sales Manager - this will list the Sales Managers at your dealership that are associated to Deal Records. It is a multi-select filter where a minimum of one selection is mandatory.

Sales Person - this will list the Sales People at your dealership that are associated to Deal Records. It is a multi-select filter where a minimum of one selection is mandatory.

Note: to generate your **Performance Monitoring Deal Log** click **Options > Export to Excel** (3).



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Add Deleted Records? – The Deal entry interface allows for the deletion of individual products within a deal or the entire deal, so this will allow you to either include those records with your results or exclude them. This is defaulted to No, which will automatically exclude the deleted records.

Language – Defaulted to Use Dealer Preferred Language, which generates the report in English or French based on the setting of the Dealer Account, but also has override options of English or French.

Performance Monitoring Financial Services Office Summary

This PDF-based report provides 7 summary tables for the Deals entered during the indicated Reporting Date period.

This is a real-time report and includes all data up to the time user runs the report (no delay in including deals).

Filters (4)

There are a number of filter options, that you are able to modify, that will allow flexibility in the data generated:

Reporting Date Start & Reporting Date End

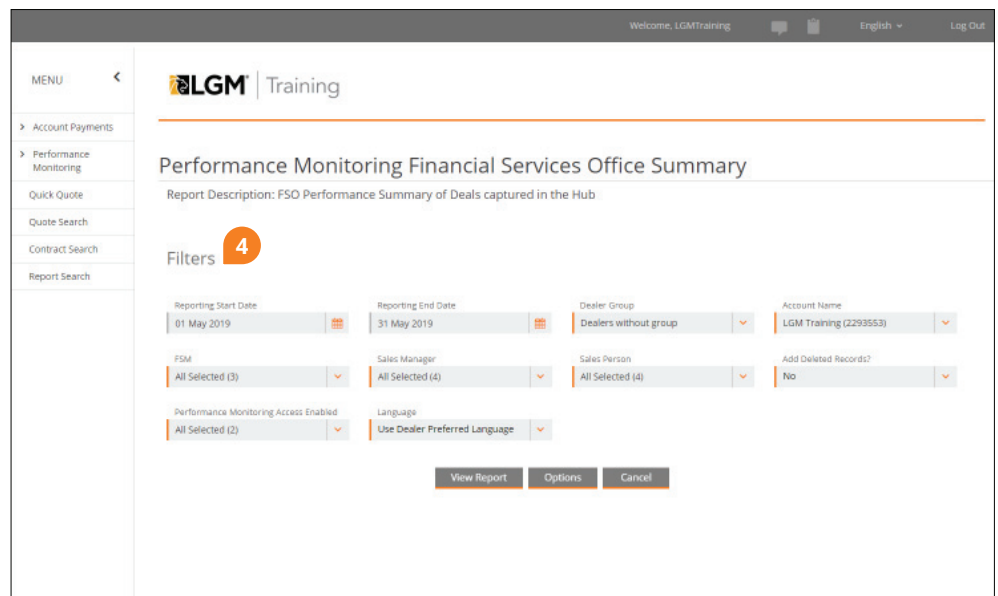
– this filter allows you to any date range and the report will generate deal information based on the Reporting Date entered in the Deal entry interface.

FSM – this will list the Financial Services Managers at your dealership that are associated to Deal Records. It is a multi-select filter where a minimum of one selection is mandatory.

Sales Manager - this will list the Sales Managers at your dealership that are associated to Deal Records. It is a multi-select filter where a minimum of one selection is mandatory.

Sales Person - this will list the Sales People at your dealership that are associated to Deal Records. It is a multi-select filter where a minimum of one selection is mandatory.

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include those records with your results or exclude them. This is defaulted to No, which will automatically exclude the deleted records.

Language – Defaulted to Use Dealer Preferred Language, which generates the report in English or French based on the setting of the Dealer Account, but also has override options of English or French.

Note: to generate your **Performance Monitoring Financial Services Office Summary** click **Options > Export to PDF** (5).

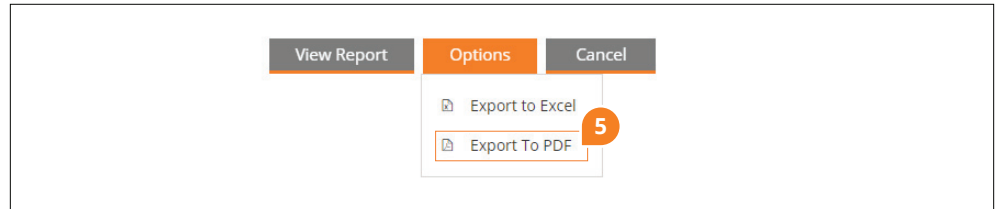


Table Section Definitions

After Sale Deal Counts are not included in the Total Deal Counts

New excludes New Vehicle sales where the Vehicle Purchase Type is Leased

Deal Type column (6) – The total count of deals entered based on the Deal Type recorded (Retail Sale or After Sale.)

Total Count (7) = Retail Sale count only

Total Profit – The sum of profit based on the table type for the specific row.

Vehicle Purchase Type Table for Cash
Row Total Profit = Total profit for all deals (both Retail Sale & After Sale) where Vehicle Purchase Type is Cash (8).

Average Profit – The Total Profit for the row divided by the Count for the row.

Vehicle Purchase Type Table for Financed
Row Average Profit = Total Profit for Financed row divided by Count for Financed row (9).

Contract Per Deal (Deal Type Table ONLY) (10) – The count of products sold for the deal type divided by the count for the deal type.

Sales Mix Percentage (Vehicle Purchase Type Table ONLY) (11) – Count per Vehicle Purchase Type divided by the Total Count of Deals

Vehicle Purchase Type Table for Cash
Row Sales Mix Percentage = Total Count for Cash row divided by Total Row Count

Deal Type				
Deal Type	Count	Total Profit	Average Profit	Contracts Per Deal
Retail Sale	1	930	930	2.00
After Sale	0	0	0	0.00
Total	1	930.00	930.00	2.00

Vehicle Purchase Type				
Vehicle Purchase Type	Count	Total Profit	Average Profit	Sales Mix Percentage
Cash	0	0	0	0%
Financed	1	930	930	100%
Leased	0	0	0	0%
Total	1	930.00	930.00	100%

New - Leased				
Product Type	Count	Total Profit	Average Profit	Penetration
MBP	0	0	0	0%
MBP (Other Makes and Models)	0	0	0	0%
CPO MBP	0	0	0	0%
Certified	0	0	0	0%
Loan	0	0	0	0%
Appearance	0	0	0	0%
Tire & Rim	0	0	0	0%
VLPP	0	0	0	0%
Anti-Theft	0	0	0	0%
Chemicals	0	0	0	0%
LEWW	0	0	0	0%
Prepaid Maintenance	0	0	0	0%
Key Protection	0	0	0	0%
	0	0	0	0%
	0	0	0	0%
Total	0	0.00	0.00	0%

Used				
Product Type	Count	Total Profit	Average Profit	Penetration
MBP	0	0	0	0%
MBP (Other Makes and Models)	0	0	0	0%
CPO MBP	0	0	0	0%
Certified	0	0	0	0%
Loan	0	0	0	0%
Appearance	0	0	0	0%
Tire & Rim	0	0	0	0%
VLPP	0	0	0	0%
Anti-Theft	0	0	0	0%
Chemicals	0	0	0	0%
LEWW	0	0	0	0%
Prepaid Maintenance	0	0	0	0%
Key Protection	0	0	0	0%
	0	0	0	0%
	0	0	0	0%
Total	0	0.00	0.00	0%

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Penetration (Tables with Product Type Details ONLY) (12) – Count of Product Type for Deals based on Table New, New – Leased, or Used definition divided by the Total Row count for the table **

Used Table MBP row Penetration =
Count of all MBP records associated to deals indicated as Used (for both Retail Sale and After Sale deal types) divided by Used Table Total Count

** Penetration for Loan product Type & Dealer Finance Reserve are limited to only deals where the Vehicle Purchase Type is not Cash.

Finance Penetration (New or Used Table ONLY) (13) – Penetration of Financed deals based on the New/ New-Leased/ Used deal classification

New				
Product Type	Count	Total Profit	Average Profit	Penetration
MBP	0	0	0	0%
MBP (Other Makes and Models)	0	0	0	0%
CPO MBP	0	0	0	0%
Certified	0	0	0	0%
Loan	0	0	0	0%
Appearance	1	200	200	100%
Tire & Rim	0	0	0	0%
VLPP	0	0	0	0%
Anti-Theft	0	0	0	0%
Chemicals	1	600	600	100%
LEWW	0	0	0	0%
Prepaid Maintenance	0	0	0	0%
Key Protection	0	0	0	0%
Dealer Finance Reserve	0	0	0	0%
Dealer Doc/Admin Fees	1	130	130	100%
Total	1	930.00	930.00	200%

All				
Product Type	Count	Total Profit	Average Profit	Penetration
MBP	0	0	0	0%
MBP (Other Makes and Models)	0	0	0	0%
CPO MBP	0	0	0	0%
Certified	0	0	0	0%
Loan	0	0	0	0%
Appearance	1	200	200	100%
Tire & Rim	0	0	0	0%
VLPP	0	0	0	0%
Anti-Theft	0	0	0	0%
Chemicals	1	600	600	100%
LEWW	0	0	0	0%
Prepaid Maintenance	0	0	0	0%
Key Protection	0	0	0	0%
Dealer Finance Reserve	0	0	0	0%
Dealer Doc/Admin Fees	1	130	130	100%
Total	1	930.00	930.00	200%

New/Used				
New/Used	Count	Total Profit	Average Profit	Finance Penetration
New	1	930	930	100%
New - Leased	0	0	0	0%
Used	0	0	0	0%
Total	1	930.00	930.00	100%

New/Used table logic

- New financed deals / New cash + New financed

- Lease / lease

- Used financed deals / All used deals

- Finance + lease / (cash + finance + lease)** exclude aftersale

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