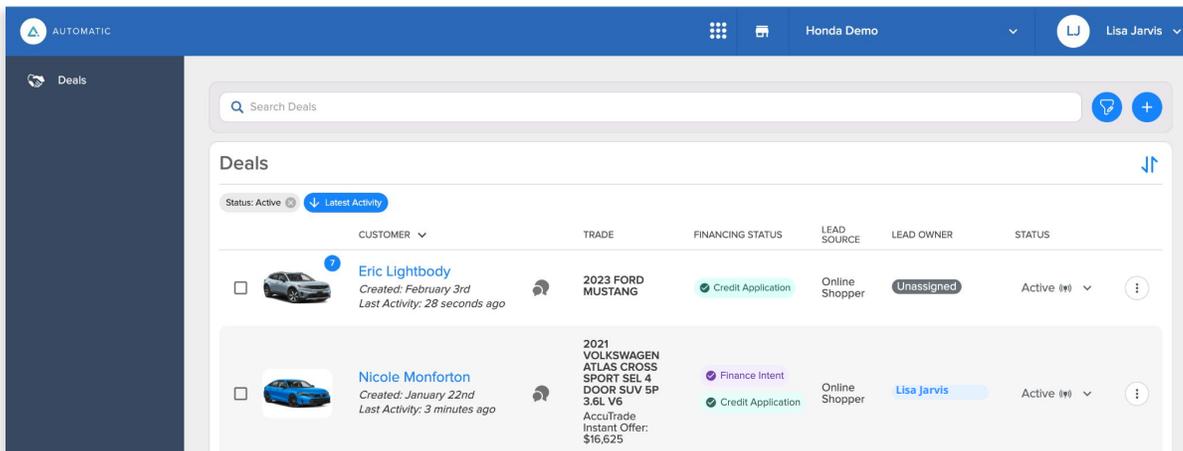


# Navigating the Deals Screen

When you login to Automatic, you'll land on the Deals screen of your selected dealership. Everything you manage in Automatic starts here, so let's take a deeper look at each feature and function to set you up for working a deal.

## Navigating Automatic

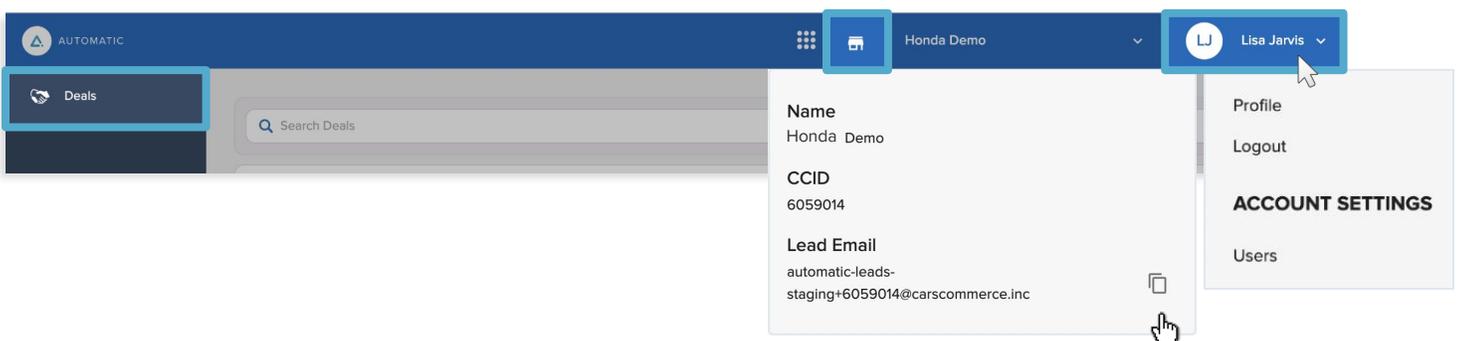
Assuming you've selected your dealership, your screen will look like this.



CUSTOMER	TRADE	FINANCING STATUS	LEAD SOURCE	LEAD OWNER	STATUS
<input type="checkbox"/> <b>Eric Lightbody</b> Created: February 3rd Last Activity: 28 seconds ago	<input type="checkbox"/> 2023 FORD MUSTANG	<input checked="" type="checkbox"/> Credit Application	Online Shopper	Unassigned	Active (1) ▾
<input type="checkbox"/> <b>Nicole Monforton</b> Created: January 22nd Last Activity: 3 minutes ago	<input type="checkbox"/> 2021 VOLKSWAGEN ATLAS CROSS SPORT SEL 4 DOOR SUV 5P 3.6L V6 AccuTrade Instant Offer: \$16,625	<input checked="" type="checkbox"/> Finance Intent <input checked="" type="checkbox"/> Credit Application	Online Shopper	Lisa Jarvis	Active (1) ▾

Let's start at the top.

- Dealership icon to view: Dealership name, CCID, and ADF/XML Lead Email
- Name in the top right corner: profile details and settings, depending on role
- To get back to the Deals Scree, click Deals on the Left



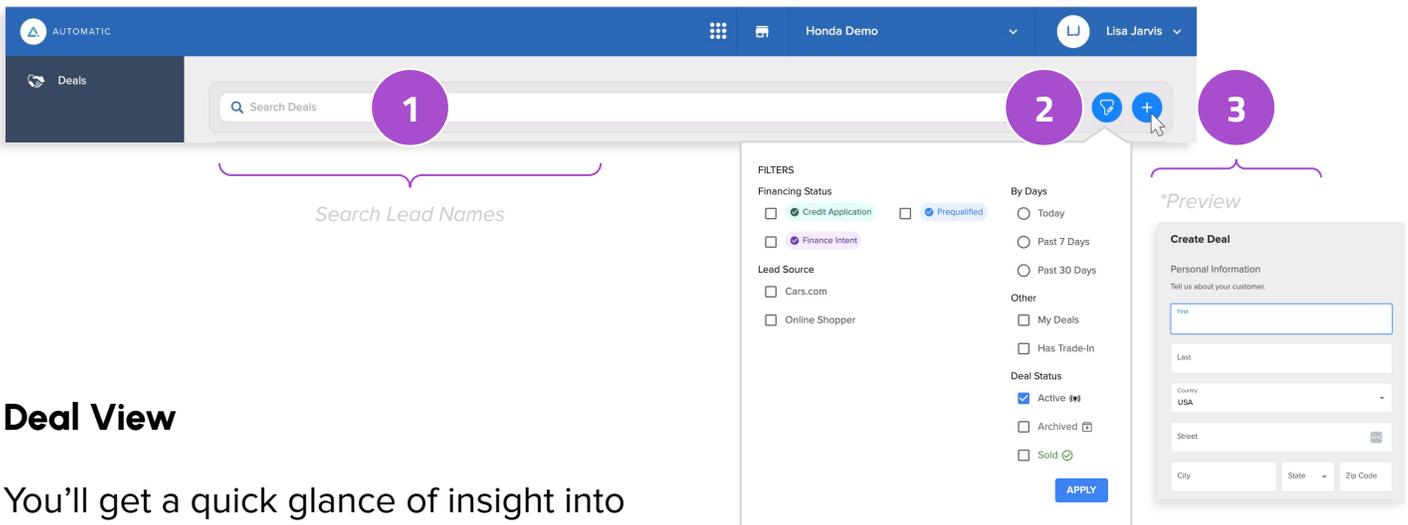
The screenshot shows the top navigation bar with the following elements highlighted:

- Deals** (Left sidebar navigation)
- Dealership icon** (Honda Demo)
- User profile dropdown** (Lisa Jarvis) containing:
  - Name: Honda Demo
  - CCID: 6059014
  - Lead Email: automatic-leads-staging+6059014@carscommerce.inc
  - Profile
  - Logout
  - ACCOUNT SETTINGS**
  - Users

## Filtering Deals

You'll be able to Search Deals, Filter Deals, and Create New Deals.

1. Search for deals by using the search bar
2. Click the Filter icon to filter deals by:
  - Financing Status, like Credit Application, Finance Intent, or Prequalified
  - Lead Source, which is where the course came from
  - Date Range, Disposition, or Other Specifics, like if the deal has a Trade-in
3. To create a new deal manually, click the blue plus sign and follow the steps.



## Deal View

You'll get a quick glance of insight into your lead from the list on the deals screen.

CUSTOMER	TRADE	FINANCING STATUS	LEAD SOURCE	LEAD OWNER	STATUS
<input type="checkbox"/>  <p><b>Eric Lightbody</b> Created: February 3rd Last Activity: 28 seconds ago</p>	 <p><b>2023 FORD MUSTANG</b></p>	<p><input checked="" type="checkbox"/> Credit Application</p>	<p>Online Shopper</p>	<p><b>Unassigned</b></p>	<p>Active (1)</p>
<input type="checkbox"/>  <p><b>Nicole Monforton</b> Created: January 22nd Last Activity: 3 minutes ago</p>	 <p><b>2021 VOLKSWAGEN ATLAS CROSS SPORT SEL 4 DOOR SUV 5P 3.6L V6</b> AccuTrade Instant Offer: \$16,625</p>	<p><input checked="" type="checkbox"/> Finance Intent <input checked="" type="checkbox"/> Credit Application</p>	<p>Online Shopper</p>	<p><b>Lisa Jarvis</b></p>	<p>Active (1)</p>

Photos of vehicles of interest (if applicable) and name of lead

Option to Chat and Trade-in Info (both if applicable)

Financing Status\*, what source the lead came from, who assigned themselves to the deal, if anyone, and its disposition.

\*Like Finance Intent, Credit Application, or Prequalified depending on how they filled out their application.

## Working the Deal

Let's say you're ready to assign the deal to yourself and begin working on it.

Click the 3 dots and select "Assign to Me."

1. Select **Quick Look** to see a pop-up window of application details
2. Select **Garage Link** to get the shopper re-engaged with their vehicles of interest
3. Click **Go to Garage** to work the deal or finalize the application

**Quick Look Pop-Up**

**Customer Info** [Edit](#)

**Eric Lightbody**  
 965 1/2 E Cantrell St  
 Decatur, IL 62521  
 asdf@asdf.com  
 (414) 301-3333

**Garage** [Open](#)

**2024 Honda Pilot EX-L 7 Passenger**  
 Stock: #T019178  
 VIN: #5FNYG1H59RB019178

**Activity**

- Hard Credit Application Started  
03/03/25, 10:27 AM EST
- Deal Created via Online Shopper  
02/28/25, 4:19 PM EST
- Vehicle Added: 5FNYG1H59RB019178  
02/28/25, 4:19 PM EST

Quick Look  
 Go to Garage  
 Assign to Me  
 Garage Link  
 Unassign

This will be your view of the detail page. You're ready to begin working your deal!

**Eric Lightbody** STATUS: Active **W** LEAD OWNER: Unassigned

**Vehicles** [Add](#)

2024 Honda Pilot EX-L 7 Passenger  
\$902.93  
Finance

**2024 Honda Pilot EX-L 7 Passenger**  
 Stock: #T019178  
 VIN: #5FNYG1H59RB019178

SALE PRICE: \$46,175  
 EST. MON. PAYMENT: \$902.93  
[PREQUALIFY BUYER](#)

**Trade-In** [Add Trade-In](#)

**Estimated Offer** [Prequalify the Buyer](#)

Type: Finance  
 Rate: 5.99% (APR)  
 Term: 60 Months  
 Payment: \$902.93 /mo

**Activity**

- Hard Credit Application Started  
03/03/25, 10:27 AM EST
- Deal Created via Online Shopper  
02/28/25, 4:19 PM EST
- Vehicle Added: 5FNYG1H59RB019178

**Prequal Application**

- \$821.14/mo  
8.09% Rate | \$0 Fee  
72 mo | \$4,618 down
- \$949.24/mo  
8.09% Rate | \$0 Fee  
60 mo | \$4,618 down

Check out our other resources on how to navigate the detail page and work your deal.