

# Time Saver - Making the Heat Sheet Easier

Are you using Excel for your Heat Sheet? Are you entering the data manually?

With a few modifications, you can make this daily chore a little easier by downloading from your DMS system. In addition, you can provide more information by using the VLookup function. By making the heat sheet easier, you can switch to a daily heat sheet instead of a monthly.

First of all you need your F&I managers and sales managers to enter their notes about the deal in a field on a deal screen – and not in an Excel spreadsheet or on a manual log. If you're going to create the heat sheet daily – then you won't have the time to type in all these notes over and over again. Find the field on your DMS system where these notes are stored, you'll need that in the next step.

You'll need to download two reports; first would be your summary schedule (mini-schedule) of all the accounts that you want to include on the heat sheet. This needs to be a one-line schedule. Cut and paste this into Excel and clean it up. Next you need to run a report from your car deal file of all the closed deals for the past few months (or the oldest date on your schedule.) You'd use RPX on ADP, ERALink for R+R, a report of the FRM in UCS, or Executive Assistant in ADP/ARG(EDS.) Include the F&I manager, the bank, the sales manager, salesperson's name, the notes and any other information that is not on your summary (mini) schedule – but would help the managers collect the funds. Copy this sheet into the same Excel workbook that has your schedule. Now create a few columns to the right that use the VLookup function to populate the valuable information from the car deal – like the bank, F&I manager, and especially the notes. Email this spreadsheet daily to each manager.

The total time to do this heat sheet is less than 15 minutes – once you get the hang of it. You can speed up the process by “linking” to the files and right clicking and !Refresh. By creating it daily – it becomes accurate, timely – and you can give it to the people who can get you results!

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