

New Dashboard — Customer FAQ

For External Use | 2026

The new StoneEagleMETRICS dashboard is the same platform powering nearly 10,000 U.S. dealerships — rebuilt around two principles: accessible data and proactive intelligence. This FAQ answers the most common questions users ask when getting started.

1 · Getting Started & Accessing the New Dashboard

Q1. How do I get access to the new METRICS dashboard?

Look for the link in the purple header at the top of your existing METRICS application — it will take you directly to New METRICS. If you don't see it yet, contact your StoneEagle representative.

Q2. Can I switch back to the classic METRICS view if I need to?

Yes. A link in the upper-left-hand corner lets you move between the new and classic METRICS at any time. Both views pull from the same underlying data — nothing changes in how your data is collected or stored. Switch freely while you get comfortable with the new layout.

Q3. Is this a different product or an upgrade to the platform I already use?

This is METRICS. The same DMS-connected platform your organization already relies on, rebuilt around two improvements:

- Accessibility — the new modular dashboard gives you more ways to configure your view than ever before. Add, remove, and rearrange widgets to put the data that matters most to your role front and center.
- Proactive intelligence — Auto Insights monitors your data 24/7 and flags problems with days of runway to fix them, not hours before the books close.

No rip-and-replace. Your data, your history, your users — now on a configurable surface that works the way your F&I operation actually runs.

Q4. How does the dashboard connect to my DMS?

METRICS uses a certified DMS integration. Deal data flows automatically via nightly imports — no spreadsheet exports, no manual uploads, no IT ticket required. The connection has been running for 9,000+ dealerships and continues to operate exactly as it did before the dashboard update.

2 · Configuring Your Dashboard

One of the biggest changes in the new METRICS is widget-level configurability. Every role — provider, dealer principal, F&I director, sales manager, finance manager — can build the exact view that moves their number.

Q5. How does the widget configuration work?

There are 7 configurable widgets available at launch. You can:

- Add or remove any widget via the Configure Dashboard panel
- Drag widgets to reorder them — your most important data goes where you want it
- Show or hide widgets per user — every seat can see a different view of the same data

- Within the Product Performance widget, you can add or remove individual products and update the penetration calculation method for each product.
- Download or print charts directly from the dashboard.
- Use multi-dealer select to filter the dashboard by a unique or ad hoc group of dealers.
- Use the Deal Breakout toggle to split metrics by new vs. used and deal type (finance, lease, cash).
- Copy a shareable link to send your current dashboard view to another user. Clicking the link allows them to open your view in their dashboard.

Q6. What are the 7 available widgets?

At launch, the widget library includes:

- **KPI Summary Cards** — Dealer Count, Units, F&I PVR, F&I Gross, Products per Deal — at a glance. KPI Summary Cards (detailed) – Dealer Count, Units, F&I PVR, F&I Gross, Products per Deal with top and bottom performers and compatible with deal breakout toggle. Great for users that manage multiple stores.
- **Product Performance Classic** — Classic donut-chart view of product penetration, units, income, and PVR with targets if configured.
- **F&I Income Distribution** — Income breakdown by category across VSC, GAP, Finance/Reserve, PPM, and Aftermarket – now with a secondary chart that shows aftermarket breakdown by product sub type.
- **Dealer Rankings** — Chart or grid view ranking dealers or employees by any metric a.k.a mini ranking report.
- **Product Leakage** — Top and bottom performers by product leakage — named, not aggregated.
- **Product Performance** — Product performance cards with penetration, income, and trending v. last period metrics. A different take on the product performance classic widget.

Q7. Can different users at the same dealership see different dashboards?

Yes — this is a core design goal for the new platform. A provider managing 200 dealers, a dealer principal watching the store, and a finance manager closing deals each build their own view. Widget show/hide is set per user, so the surface each person sees is configured around the question they're trying to answer.

Q8. How do I access the widget configuration panel?

Click the gear icon in the top-right corner of the dashboard. From the Configure Dashboard panel, you can search widgets, add them to your active view, remove them, and drag to reorder.

3 · Auto Insights

*Auto Insights powers the new proactive intelligence layer in **METRICS**. It runs 24/7 and surfaces data issues while there is still time to fix them — not after the books close.*

Coming soon. *Auto Insights is currently active in development. We will notify users as new features become available. The capabilities described in this section reflect the intended upcoming features in addition to one that has already launched.*

Q9. What is Auto Insights?

Auto Insights is a continuous monitoring framework that analyzes your dealer data around the clock and flags four categories of issues:

- **Unmapped Products** — Products recorded in your DMS that haven't been matched to a product category in **METRICS**, creating gaps in your performance data.
- **Sale Type Review** — Deals coded to the wrong sale type — new vs. used, retail vs. fleet — that would distort penetration and PVR calculations. (*Coming Soon.*)

- **Data Outliers** — Deals with reserve, premium, or gross figures that fall statistically outside the norm for your dealership, flagged for review. *(Coming soon.)*
- **Deal Alerts** — Individual deals flagged for manual review based on configurable rules. *(Coming soon.)*

Q10. What is the value of Auto Insights?

Auto Insights gives your team visibility into data quality issues before they affect your reports. When Unmapped Products, Sale Type errors, Data Outliers, or Deal Alerts are surfaced early, your team can correct them while there is still time — rather than discovering problems after the books close. The result is cleaner data, more accurate reporting, and less time spent on month-end corrections.

Q11. How is Auto Insights different from the data I already see in my METRICS reports?

Existing METRICS reports confirm what your data says. Auto Insights identifies what's wrong with your data before it becomes a report. It's the distinction between retrospective confirmation and proactive flagging — the same distinction between finding a problem after the books close vs. having nine days of runway to fix it.

Q12. Does Auto Insights replace our current month-end process?

It improves it. Your existing close process doesn't change — Auto Insights runs alongside it and surfaces issues earlier in the month, so less work piles up on the last three days. Teams that adopt it typically move from reactive month-end triage to a more continuous data hygiene rhythm.

4 · Product Leakage

Q13. What is Product Leakage?

Product Leakage works at two levels. When a provider is set as the preferred provider at a dealer, any products sold outside of that provider are considered leakage — revenue going to a competitor rather than the preferred channel. At the individual level, the Product Leakage widget surfaces top and bottom performers across VSC, GAP, PPM, Finance/Reserve, and Aftermarket, named down to the individual contributor, rather than averaging performance across the store.

Q14. Why does individual visibility matter? Can't I just watch the store average?

Store averages hide leakage. A dealership running 48% VSC penetration looks acceptable until you see that one finance manager is at 72% and another is at 21%. The 48% average masks both the strength and the gap. Product Leakage doesn't let you average away the problem — it names it, which is the precondition for coaching it.

Q15. Who can see the Product Leakage widget?

The Product Leakage widget is available to all users. Each person can choose whether to add it to their configured dashboard and how they want to see it — the widget is part of the configurable library, and every user decides what their view shows.

5 · Industry Data and Benchmark my Dealers

Q16. What is Industry Data?

Industry Data is a completely redesigned view inside METRICS that gives every provider, dealer, and F&I team access to national F&I performance benchmarks for the first time. While industry benchmarks have always existed inside StoneEagle, this is the first time they are available directly in the platform — surfaced through a dedicated Industry tab with four widgets: Industry Performance, Industry Trend Analysis, Top Performer Benchmarks, and F&I Income Distribution (Trend).

The Industry Performance widget shows 8 snapshot KPIs — Avg Deals Per Dealer, F&I PVR, Products Per Deal, Finance Penetration, VSC Penetration, Maintenance Penetration, GAP Penetration, and Aftermarket

Penetration — each with current period value, prior period comparison, and change. The Industry Trend Analysis plots any of these metrics as a 24-month rolling line chart, viewable monthly or quarterly. Top Performer Benchmarks shows what the top 5%, 10%, and 25% of dealers are achieving on each metric. F&I Income Distribution (Trend) shows how the income mix across Finance Reserve, VSC, GAP, Maintenance, and Aftermarket has shifted over 24 months.

Q17. What is Benchmark My Dealer?

Benchmark My Dealer is a feature on the Industry tab that lets users compare their book of business to the national industry averages. It is not a toggle on every dashboard metric — it lives within the dedicated Industry Benchmark Dashboard and gives you a direct, side-by-side view of how any dealer or dealer group stacks up against the broader market. The Industry tab reports on 8 key F&I KPIs across penetration and income metrics.

Q18. How current is the benchmark data?

Industry data updates on the same cadence as the rest of the data in **METRICS** — refreshed once a day. Filters let you narrow the comparison to like-for-like stores — by year, inventory type (new/used), finance type, OEM, state, and region — so "industry average" means dealers who actually look like yours.

6 · Provider & Multi-Dealer Views

Q19. How does the dashboard work for providers managing multiple dealers?

Providers can view performance across their entire book of dealers — product penetration, attach rates, leakage patterns, and performance distribution — on a single screen. The same widget-level configurability that applies at the dealer level applies at the book level: configure the view around the questions your field agents and income development team actually need to answer.

Q20. Can providers give each dealer their own view?

Yes. Every dealer in a provider's portfolio can have a view configured around their specific data. A provider builds the top-level view; each dealer runs their own configured dashboard on the same platform. This is one of the core stickiness features of the product — every dealer that builds its management rhythm around **METRICS** stays on **METRICS** regardless of provider movement.

Q21. Is there a view for dealer groups managing multiple rooftops?

The dashboard includes widgets specifically built for users managing multiple rooftops. The Dealer Rankings and Product Leakage widgets surface top and bottom performer dealers by key KPIs at a glance — so a group principal or provider can instantly see which stores are leading and which need attention without clicking into each one individually. Additional group-level functionality, including a dedicated Group Performance Grid, is in development. Your StoneEagle representative can provide an update on availability timing.

7 · Data & Accuracy

Q22. Has my data or data processing changed with the new dashboard?

The short answer is that your data has not changed. The same data quality standards and transformation processes that have always powered **METRICS** remain in place. What has changed is that we have added, an intelligent agent that works 24/7 on every dealer's behalf to continuously check for discrepancies, mis-mappings, outliers, and missing information — surfacing issues proactively rather than waiting for someone to find them at month-end.

Q23. How often does the data refresh?

The dashboard operates on the same DMS-connected data model. Deal data refreshes on a nightly cadence — no manual export, no overnight batch job required for the core reporting layer. Auto Insights runs 24/7 on top of this feed to monitor data hygiene issues in real time.

Q24. What if my data looks wrong?

As Auto Insights evolves, it will often surface data discrepancies before you notice them in a report. If you identify a specific issue, contact your StoneEagle representative or the support team at support@stoneagle.com.

8 · Compatibility & Transition

Q25. Do I need to do anything to transition from classic METRICS to New METRICS?

No migration is required. Your data, your users, your DMS connection, and your historical reports stay exactly as they are. The new dashboard is additive — you gain widget-level configurability and Auto Insights, and the new surface while everything in classic METRICS continues to operate unchanged. The toggle between views lets your team move at their own pace.

Q26. Are all the reports I use in classic METRICS available in New METRICS?

Yes. Reports available in classic METRICS are accessible in New METRICS. This includes any scheduled reports you may have set up.

9 · Getting Help

Q27. What's the best way to get help during onboarding?

Your StoneEagle representative or Income Development Agent is your first point of contact for onboarding questions — dashboard configuration, user setup, and widget walkthroughs. For technical issues not covered by this FAQ, contact StoneEagle Customer Support at support@stoneagle.com.

Q28. Where do I report a bug or product issue?

Contact your StoneEagle representative directly. Issues are tracked and triaged by the METRICS development team. You can also use the feedback button within METRICS to submit questions, comments, and concerns directly to the team — or reach our support team by email or phone.

Q29. Is a How-To guide for reports, Admin tools, and other features planned?

Additional how-to content covering Reports, Admin tools, Deal Details Maintenance, F&I Objectives, and related features is planned as the platform rollout progresses. Your StoneEagle representative can walk you through any of these areas in the meantime — and role-specific training sessions are available on request.