



Car Wars
by Call Box

elead

BEST PRACTICES



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ACCESS INBOUND CALLS

1

Go to **Desklog**.

2

Select the **Call Track** tab on the right side.

3

The Call Track will default to show **Status: Open**. Click to **Status: All** to see all inbound calls for the date range.

4

To find and log new prospects, click on the **Status Open** tab, where you will find calls that did not have an active lead to attach to. To listen to the call, click the speaker icon.

The screenshot displays the CRM Desk Log interface. The top navigation bar includes tabs for Home, Add, Search, Desk Log (highlighted), Service, Leads On, and Text Messages. The left sidebar shows various CRM modules like Customer, Inventory, Prospects, and Reports. The main content area is divided into three sections: Appointments, Desk Log, and Call Tracking. The Call Tracking section is active, showing a list of calls with columns for Prospect Name, Phone / Type, Salesperson, Time, Campaign, Source, Lead Type, Add Note, and Actions. The Status filter is set to 'Status: Open' (highlighted). The table lists three calls from 3/26/2024, all with a duration of 3:37, 3:50, and 4:47 respectively, and a source of 'Car Wars'.

Prospect Name	Phone / Type	Salesperson	Time	Campaign	Source	Lead Type	Add Note	Actions
Click Here to Update Name	(214) 123-0001 Cell	Alvarez, Karina	3/26/2024 4:47:00 PM Duration: 3:37	Anchor Number (Website Sales)	Car Wars	Sales	+	Save Delete
Click Here to Update Name	(214) 456-0002 Cell	Davis, Alex	3/26/2024 3:50:00 PM Duration: 3:50	Google Business Profile	Car Wars	Sales	+	Save Delete
Click Here to Update Name	(214) 789-0003 Cell	Alvarez, Karina	3/26/2024 1:15:00 PM Duration: 4:47	Google Business Profile	Car Wars	Sales	+	Save Delete

5

Clicking on the call will direct you to the Car Wars platform:

4

The screenshot displays the Car Wars platform interface. On the left, there's a sidebar with navigation options like 'Desk Log', 'Appointments', 'Leads', etc. The main area shows a 'Desk Log' for the date 03/27/2024. It lists appointments with columns for 'Show', 'N/U', and 'Customer'. Below this, there's a 'Call Log' section with a table of calls. One call is highlighted, showing details like 'Anchor Number (Website Sales) 214-555-1111 Sales (ext. 2)', 'Customer Number: 214-456-0002', and 'No Active Lead in CRM'. A 'Call Transcript' is also visible, showing a conversation between a customer and a salesperson named Alex Davis. The transcript mentions a Toyota dealership and a Highlander. On the right, there's a 'Call Tracking' section with a table of leads and a 'Refresh' button.

6

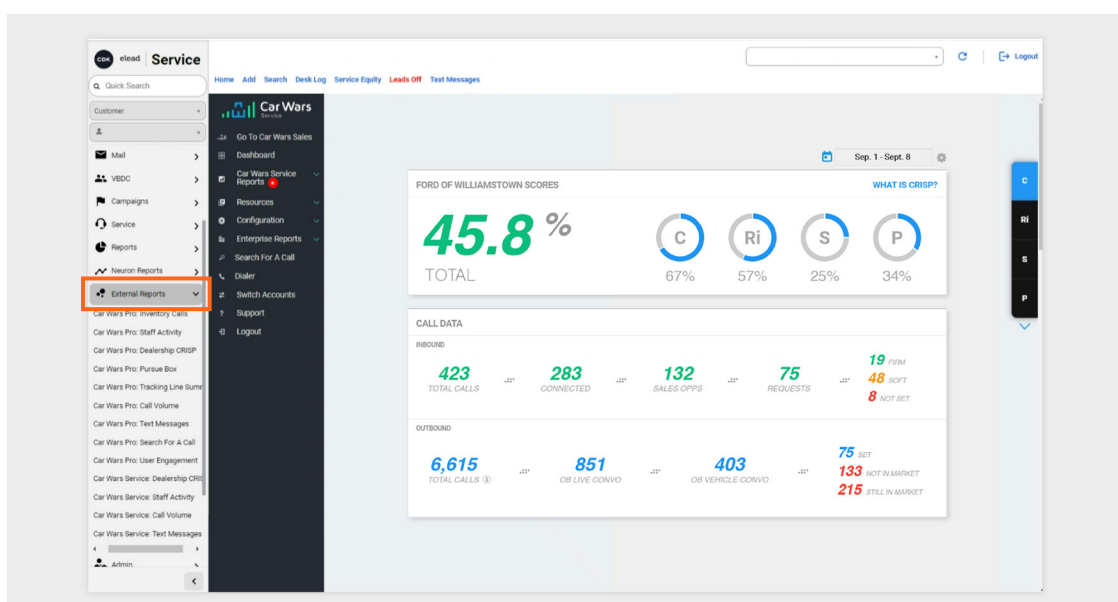
After listening to the call, click **Save** to create a new lead, or **Match** to attach to an existing opportunity. Once saved or deleted, the call will be removed from Status Open.

The screenshot shows the Car Wars platform interface with an 'Update Name' dialog box open. The dialog box has fields for 'First Name' (Jenna) and 'Last Name' (Hoctor). Below these fields are two buttons: 'Save Name' (highlighted with a red box) and 'Cancel'. The background shows the 'Appointments' section with a table of appointments. The table has columns for 'Show', 'N/U', 'Customer', 'Due', 'Salesperson', 'Confirm', and 'No Show'. Below the table, there's a 'Desk Log' section with a table of calls. The table has columns for 'Prospect Name', 'Phone / Type', 'Salesperson', 'Time', 'Campaign', 'Source', 'Lead Type', 'Add Note', and 'Action'. Two calls are listed: one for 'Jenna' and one for 'Hoctor'. The 'Save Name' button is highlighted with a red box.

UTILIZE YOUR EXTERNAL REPORTS TAB

1

Open the **External Reports** tab. A list of Car Wars reports will appear.



CHECK OUT THE FOLLOWING REPORTS DAILY



Pursue Box tees up the calls that need your attention and allows you to easily salvage missed opportunities.



Dealership CRISP gives you an overall view of your dealership's phone performance.



Staff Activity shows you how each individual agent is performing on the phone.

SET UP CLICK TO CALL

1

In the Elead system, go to **Admin** then **CRM Setup**. Click **Personnel**.

Modern Retail
> CRM

Quick Search

Customer: Tanner, Rick

Inventory

Prospects

Organizer

Dashboards

Mail

VBDC

Campaigns

Reports

External Reports

Admin

CRM Setup

Change Password

Home Add Search Desk Log Leads On Text Messages

CRM Setup

Company Management

Change Password
Change Task DueDate
Daily Workplan Tracking
Department Maintenance
Do Not Call Registry
Fiscal Month Setup
Holidays Maintenance
Lead Assignment Rules
Lead Provider Setup
Lead Validation Rules
Manage Credit Card Processor
Manage Internet Lead Reception Availability
Manage Sales Status
Manage Sources
Personnel
Personnel View
Position Maintenance
Preferences
Pricing Rules
Report Subscriptions
Schedule Maintenance
Template Categories Admin

Description

Click here to update passwords
Click here to change activity DueDate for by Salesperson
Click here to track the Daily Workplan
Click here to Add, Delete, or Edit Departments for the company
Click here to enter or view your Do Not Call registry SAN number
Click here to setup the corporate reports fiscal months
Click here to Add, Delete, or Edit Holidays for the company
Click here to add, delete, or edit lead assignment rules for the company
Click here to setup the lead providers your dealership(s) uses
Click here to add, delete, or edit lead validation rules for the company
Click here to set/update company settings for credit card processing
Click here to turn on and off internet lead reception for salespeople and agents
Click here to manage the sales statuses for the company
Click here to modify sources for the company
Click here to add, delete, or edit personnel for the company
Click here to add, delete, or edit personnel for the company
Click here to add, delete, or edit positions for the company
Click here to change various preferences
Pricing rule Administration for internet prices. Applies to Auto Quote and Inventory Feeds
Click here to add, edit, or delete report subscriptions
Click here to add, delete, or edit schedules for the company
Click here to group templates into categories for reporting

Opportunity Management

Configure Sales Steps
Management Escalation
Skate Alert
Template Builder
Templates

Description

Click here to configure additional sales steps (i.e. Demo, TO, WriteUp, etc.)
Click here to configure management escalation rules
Click here to view and resolve possible duplications of prospects
Click here to manage templates
Click here to add, edit, or delete templates

2

Select an agent.

Modern Retail
> CRM

Quick Search

Customer: Tanner, Rick

Inventory

Prospects

Organizer

Dashboards

Mail

VBDC

Campaigns

Reports

External Reports

Admin

CRM Setup

Change Password

Service

Support

Home Add Search Desk Log Leads On Text Messages

Personnel

Name	Department	Role	Status
Barber, Tim		Administrator	E
Barnes, Daniel	Service Department	Victory Call Center	
Bennett, Phillip	Service Department	Victory Call Center	
Beverly, Samuel		Salesperson	E
Bigelow, Steve		Victory Call Center	
Bridges, Ashley	Service Department	Victory Call Center	
Callaway, Nancy	Service Department	Victory Call Center	
Calvin, Patrick	Service Department	Victory Call Center	
Cambell, Sean	Service Department	Victory Call Center	
Carlson, Wayne	Service Department	Victory Call Center	
Chadwick, Paula		Administrator	
Chavez, Eric		Administrator	E
Churchill, Jeremy	BDC Sales	Administrator	E
Clay, Diane	Sales	Administrator	
Clemens, William	Sales	Administrator Desk Manager General Sales Manager GoldDigger Specialist xChange Specialist	E
Cook, Kelly	BDC RR BDC Sales Internet Sales New Car Sales Round Robin Sales	BDC Agent BDC Manager GoldDigger Specialist Salesperson xChange Specialist	E, W
Corey, Ralph	Main Service Service Department	Service Technician	
Crain, Janet	Main Service Service Advisor Service Department	Service Advisor	
Dale, Gregory	Service Department	Administrator	

3

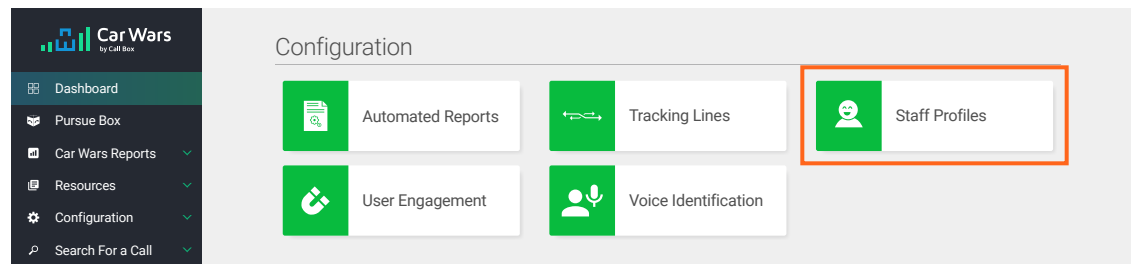
Make sure there is at least one phone number under each person and that their Car Wars phone code is listed as their Telephony ID.

We do suggest adding both their desk phone and cell phone in case they would like to make calls away from their desk.

7

4

To find the Car Wars phone code, go to carwars.com and select the **Staff Profiles** report.



5

Find the four digit phone code in front of each person's name in the Staff list. This is the code that needs to be entered in Elead as the Telephony ID.

HOW TO MAKE OUTBOUND CALLS

1

In order to successfully complete an outbound task through Click to Call, an agent must make the call from the prospect's **Process Activity** tab.

2

Select **Complete** from Opportunity Details to open the task in **Process Activity**.

The screenshot shows the Modern Retail CRM interface. On the left is a sidebar with navigation options: Customer, Inventory, Prospects, and Organizer. The main area displays a list of activities for a prospect named Davidson, Lillie. The activity at 5:37 PM, 'Phone Follow Up', is highlighted. A pop-up window titled 'Process Activity' is open, showing details for White, Lewis Vergil. The 'Current Activity' section is active, and the 'Next Activity' section is also visible. A red box highlights the 'Complete' button in the top right corner of the 'Process Activity' window.

3

From here, agents can click on the customer's blue hyperlinked phone number to initiate the Click to Call.

This screenshot is similar to the previous one, but the 'Process Activity' window is more fully expanded. The 'Current Activity' section shows the 'Phone Follow Up' activity. The 'Next Activity' section is also visible. A red box highlights the 'Home Phone' number, (214) 555-1111, which is a blue hyperlinked phone number. The 'Completed At' date is set to 03/28/2024.

4

Outbound call data is pushed into the prospect record.

IN-DEPTH ELEAD INTEGRATION

1

If you received a Missed Opportunity Alert from Car Wars via text or email — or you're listening to phone calls — click on the **Open in Elead** button at the top right.

Thu, Jan 4 - 11:10 AM Ford of Williamstown

Website 214-555-0000 (Ext. 2)
Connected, Sales opp, No appt request

Rick Tanner
43% Talk Time

Customer Data ▾

CUSTOMER INFO

OPEN IN ELEAD

Customer Number: 214-555-1000

Customer Name: Jenna Hctor

Event Status: Open Lead

0:00

5:13

Call Recap

Call Transcription

The customer was calling to ask to see the vehicle she is interested in. Caller's name is Jenna. She is on the website and is interested in a Used 2016 Ford Escape. She asks about mileage and color. The agent tells the customer the mileage and says the car is great. Caller thanks Agent. Agent says to call back with questions.

2

If a call has been logged, the customer or prospect record will automatically open.

Thu, Jan 4 - 11:10 AM Ford of Williamstown

Website 214-555-0000 (Ext. 2)
Connected, Sales opp, No appt request

Rick Tanner
43% Talk Time

Customer Data ▾

CUSTOMER INFO

OPEN IN ELEAD

Customer Number: 214-555-0000

Customer Name: Jenna Hctor

Event Status: Open Lead

0:00

6:14

Call Recap

Call Transcription

The customer was calling to ask to see the vehicle she is interested in. Caller's name is Jenna. She is on the website and is interested in a Used 2016 Ford Escape. She asks about mileage and color. The agent tells the customer the mileage and says the car is great. Caller thanks agent. Agent says to call back with questions.

Translated

Secure | https://www.elead.com/enr2/fresh/lead-v45/lead_track/NewProspect/OpptyDetails.aspx?PID=291784305&ID=294893015

CUSTOMER

OPPORTUNITY

Name: Jenna Hctor

Address: 1234 Main Street
Dallas, TX 75201

Phone #: (214) 555-0000

Cell #: (214) 555-0000

Preferred Email: jenna.hctor@gmail.com

Religion:

Last Modified: 11/17/2021 11:49:41 AM

High Priority

ID: 123456789

Vehicle: Used 2018 Ford Escape

Stock #: 2014 Ford Escape

Sales Team: Tanner, Rick - New Car Sales

Up Type: Phone Up

Source: Website

Date/Time Due: 11/16/2021 11:00:00

Sales Status: No Contact

TO: Write Up Demo

Contacts | Service | Relationships | Info/Other | Lifetime Value | Vehicles | Audit Trail | Details

Scheduled Contact Activities

Date	Type	Assigned To	Comment	Action
11/28/21 11:00 AM	No Contact Call #1	Tanner, R		
11/28/21 10:00 PM	No Contact Email #1	Tanner, R		

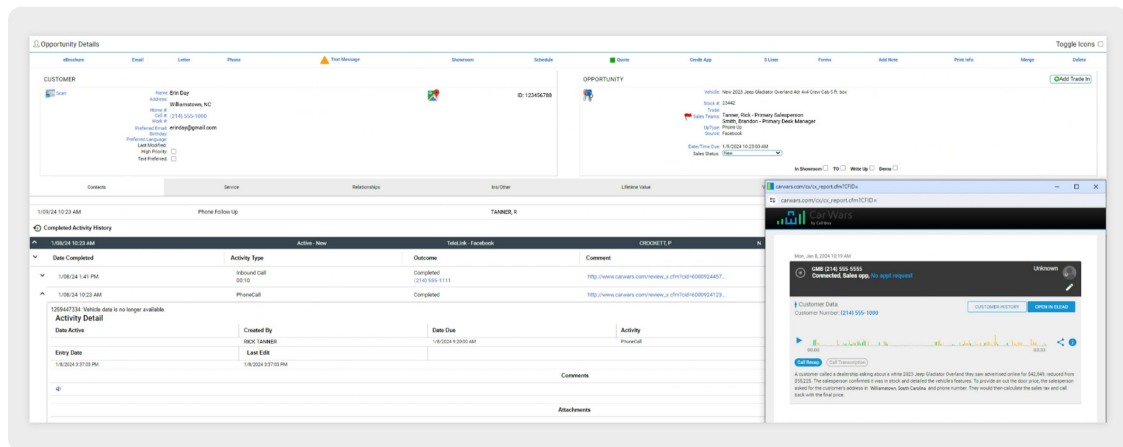
Completed Opportunity Activity History

Date	Activity Type	Outcome	Comments	Completed By	Action
11/17/21 11:00 AM	Inbound Call	Completed	http://www.carnews.com/review.x.cdn?cd=1768003123...	System	View
11/17/21 11:30 AM	Completed	Completed	Your Ford Escape	Tanner, R	View
11/17/21 12:00 PM	LM / RA	(No Answer)	http://www.carnews.com/review.x.c...	Tanner, R	View

3

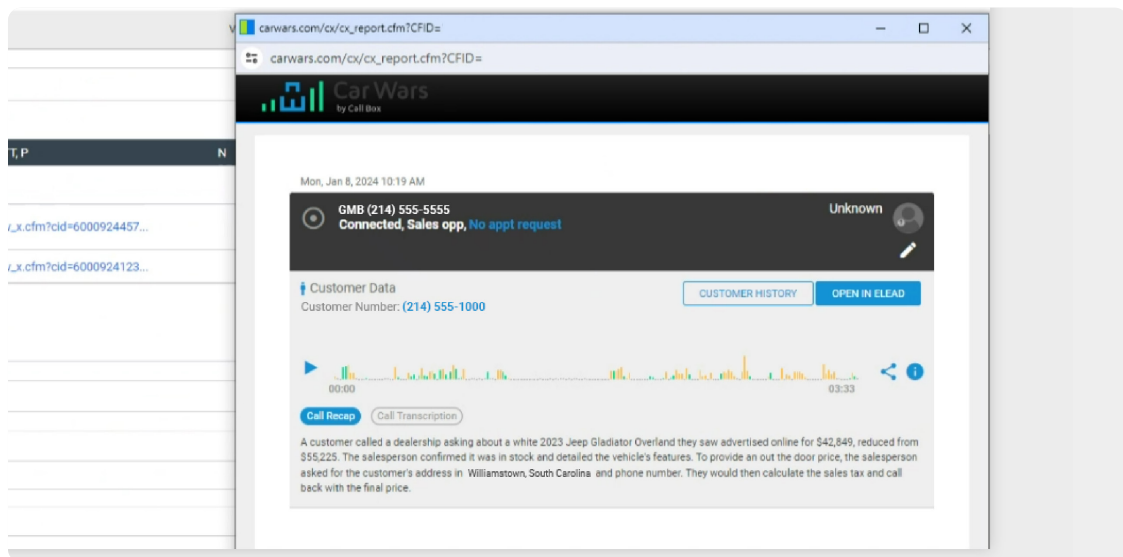
View text message details in the prospect record. We also include the link to open it in the Text Messages platform of Car Wars.

10



4

Car Wars sends the recap description directly into the prospect record.



MANAGE SCHEDULED AND COMPLETED TASKS

1

Choose the **Reports** tab.

2

A list of subfolders will appear. Click on **Activity**, **User Performance - Rec** then **User Activity Completion**.

The screenshot shows the 'Reports' tab selected in the left sidebar. The main content area displays a list of subfolders under 'Inventory'. The 'User Performance - Rec' folder is highlighted. Below it, the 'Report' section lists several reports, with 'User Activity Completion' highlighted. The 'Description' column provides details for each report.

Report	Description
User Activity Completion	User Activity Completion: reports on the Activity Completion of Users, d
User Activity Performance	User Activity Performance: reports on Ups and Activity Stats by User.
User Appointment Activity	User Appointment Activity: reports on Appt Statistics by created by Us
User Appointment Confirmation	User Appointment Confirmation: reports on Appt Confirmation Stats b
User Stats by Sales / Source	User Stats by Sales / Source: reports on Ups and Appts Stats by User
User Up and Activity Performance	User Up and Activity Performance: reports on Users prospect creation

3

Adjust the date range to the timeframe you want to view. Then select **Task Type** as **Phone Call**.

The screenshot shows the 'Modern Retail' CRM interface. The 'Reports' tab is selected in the left sidebar. The main content area displays the 'User Activity Completion (U), 3/28/2024' report. A 'Select Criteria for Report' dialog box is open, showing filters for 'From' (03/01/2024), 'To' (03/28/2024), 'Salesperson' (All), 'Department' (All), 'Task Type' (Phone Call), 'Position' (All), and 'Workflow' (All). The 'Task Type' dropdown is highlighted.

Scroll to the bottom for the total number of **Completed Tasks** (in this case phone calls).

Customer: Tanner, Rick
Service: >
Reports: >

User Activity Completion (U), 3/28/2024

[Back to Criteria](#) [Export](#) [Print](#)

User Activity Completion (U)

Ford of Williamstown

Generated: 3/28/2024 1:31:01 PM
Report Period: 3/1/2024 - 3/28/2024
Salesperson: -All
Department: -All
Task Type: Phone Call
Position: -All
Workflow: -All

Dealership	Name	Activities Due	Completed	Due Today	Over Due	Avg Over Due	% Scheduled Activities Completed
Ford of Williamstown	Alvarez, Karina	309	292	7	20	0	93%
	Anderson, Marcus	989	962	30	31	0	94%
	Concierge	92	7	3	85	15	4%
	Davis, Alex	195	183	29	12	3	90%
	Davidson, Margaret	1090	1113	82	0	0	100%
	Derwent, Lucas	696	636	13	49	0	92%
	Evans, Michael	588	498	29	107	3	78%
	Greene, Pete	831	770	15	65	2	90%
	Hernandez, Richard	2	0	0	2	4	0%
	Jackson, Macy	7	1	0	7	7	0%
	Jacobs, Greg	1034	996	63	44	1	94%
	Jones, Carter	121	99	11	14	2	81%
	Kent, Bryce	8	4	0	4	6	50%
	Lee, Jackson	870	861	31	0	0	98%
	Lim, Stephanie	66	39	1	54	14	18%
	Mann, Hugh	59	42	1	23	10	59%
Total Users		6957	6503	315	517	1	91%

Then move to the Telephony tab. Select **Car Wars Pro: Staff Activity**.

- Make sure the date range is the same as what you used for "Scheduled and Completed Tasks" above (top-right corner of Staff Activity report).
- View Total Outbound to check if it's close to the number of Completed Phone Call tasks. If not, check with your staff to ensure they're recording their outbound calls through Click to Call.

Quick Search

Customer

Tanner, Rick

Prospects

Organizer

Dashboards

Mail

VBDC

Campaigns

Service

Reports

External Reports

Car Wars Pro: Inventory Calls

Car Wars Pro: Staff Activity

Car Wars Pro: Dealership CRI

Car Wars Pro: Pursue Box

Car Wars Pro: Tracking Line S

Car Wars Pro: Call Volume

Car Wars Pro: Text Messages

Car Wars

by Call Box

Go To Car Wars Service

Dashboard

Pursue Box

Car Wars Reports

Resources

Configuration

Enterprise Reports

Search For A Call

Dialer

Switch Accounts

Support

Logout

Rick Tanner

Ford of Williamstown

03/01/2024

03/28/2024

STAFF ACTIVITY

Auto Refresh

OFF

TV

CALLS

TEXTS

All Groups

OUTBOUND

INBOUND

LEARN MORE

Agent	Total Outbound	Unique Outbound	Live Convo	Vehicle Appt Convo	Appt Set	Avg. Talk Time	Sales Opps Claimed	Appt Requests	Appts Booked (Firm Soft)	Agent Line (Calls Fallback)
Karina Alvarez	759	408	99	63	8	1:04	4	2	0 1	27 10
Marcus Anderson	651	155	80	56	13	1:08	3	1	0 1	15 2
Alex Davis	415	178	93	58	8	1:48	38	28	13 5	32 6
Margaret Davidson	310	156	70	60	13	1:25	36	23	6 10	8 0
Lucas Derwent	289	192	67	15	1	1:52	0	0	0 0	- -
Michelle Evans	215	117	78	61	19	2:02	25	17	3 9	13 1
Pete Greene	186	111	17	9	1	1:03	0	0	0 0	- -
Richard Hernandez	185	84	49	40	15	1:15	5	4	1 1	6 2
Macy Jackson	128	126	0	0	0	1:32	0	0	0 0	- -
Greg Jacobs	72	70	2	2	1	1:03	0	0	0 0	- -
Carter Jones	67	32	15	10	2	1:47	0	0	0 0	- -