Car Wars by Call Box

elead

BEST PRACTICES

TABLE OF **CONTENTS**

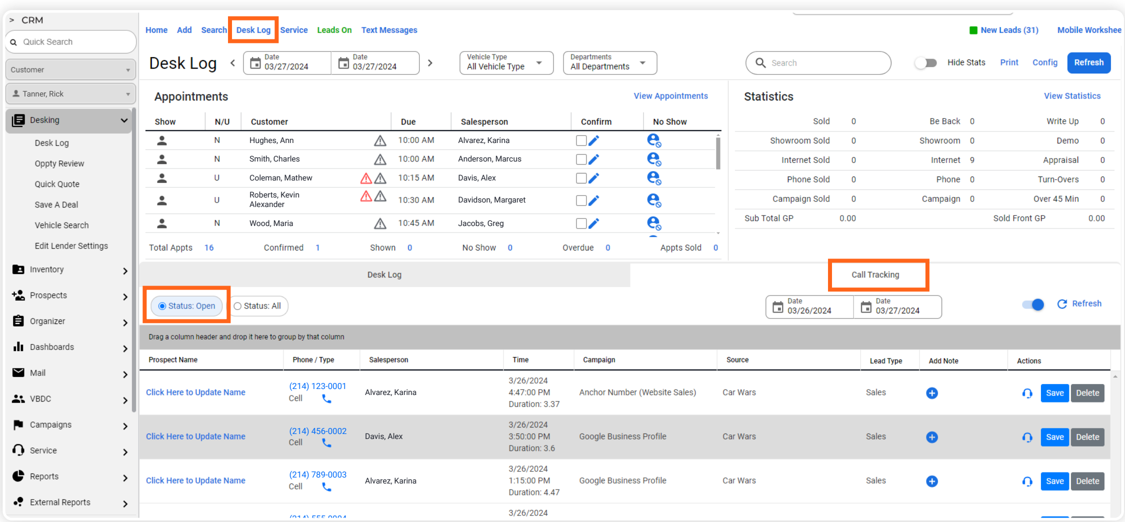
ACCESS
INBOUND CALLS

1 Go to **Desklog**.

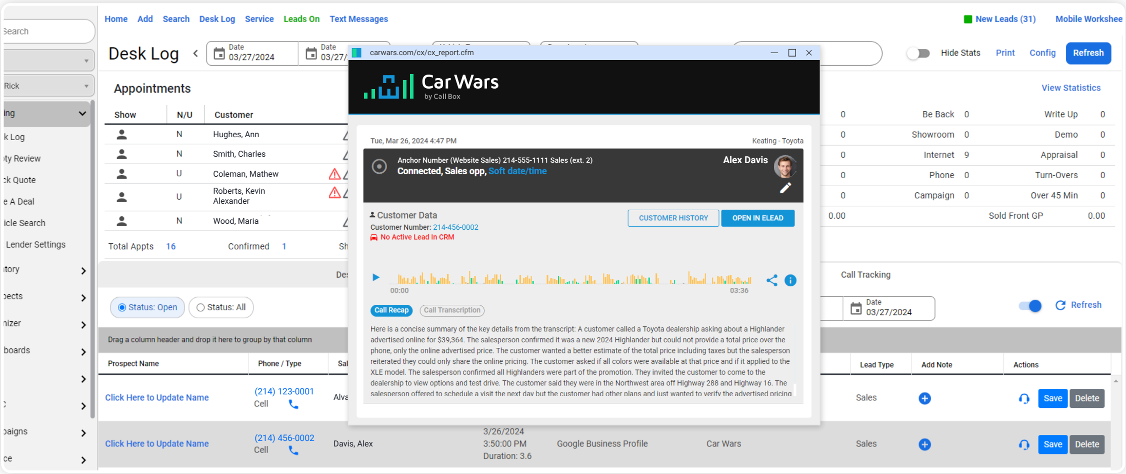
2 Select the **Call Track** tab on the right side.

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

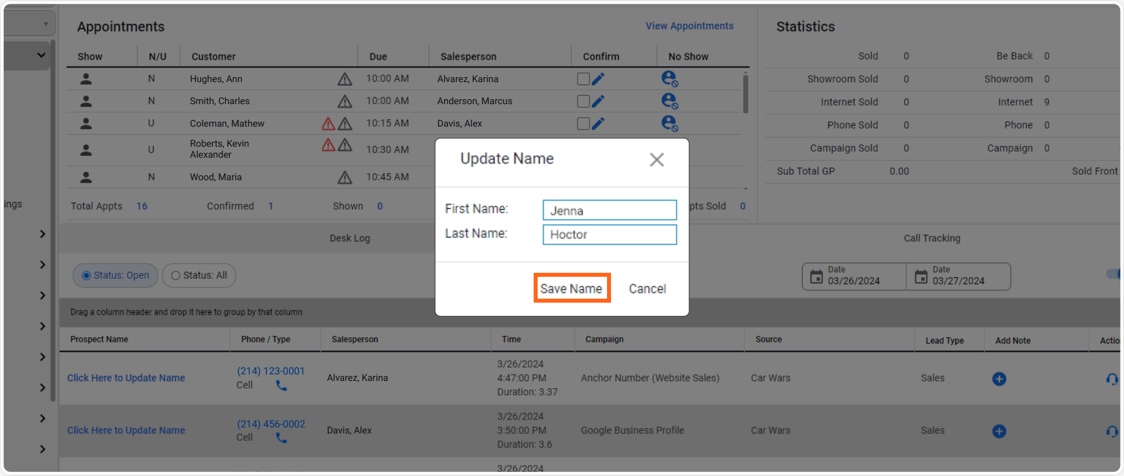
4 To find and log new prospects, click on the **Status Open** tab, where you will find calls that did not have an active lead to attach to. To listen to the call, click the speaker icon.



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

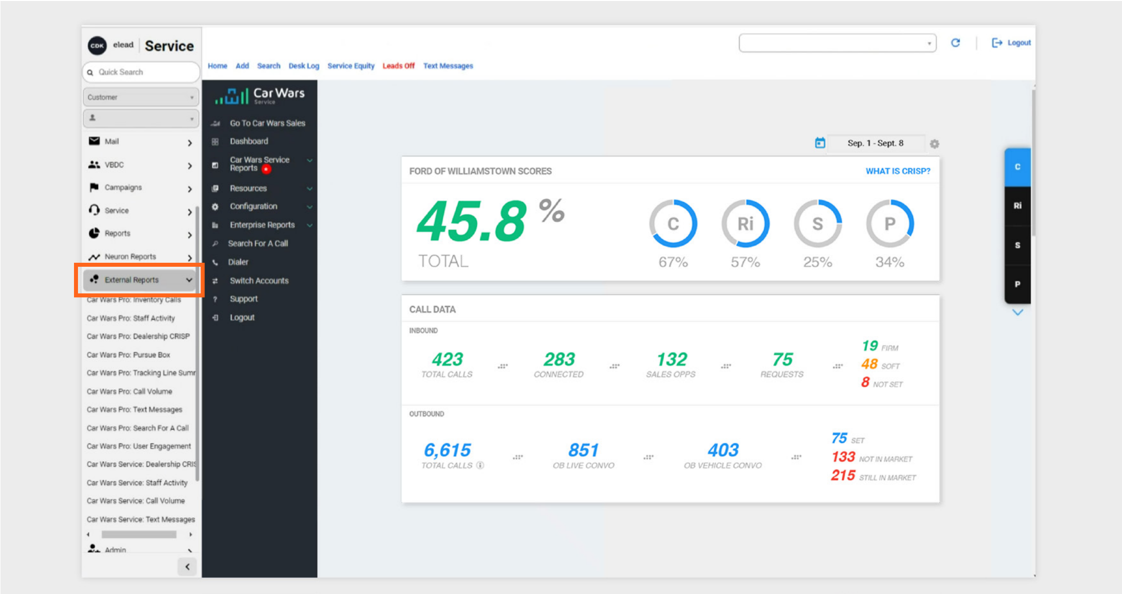


6 After listening to the call, click **Save** to create a new lead, or **Match** to attach to an existing opportunity. Once saved or deleted, the call will be removed from Status Open.



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.

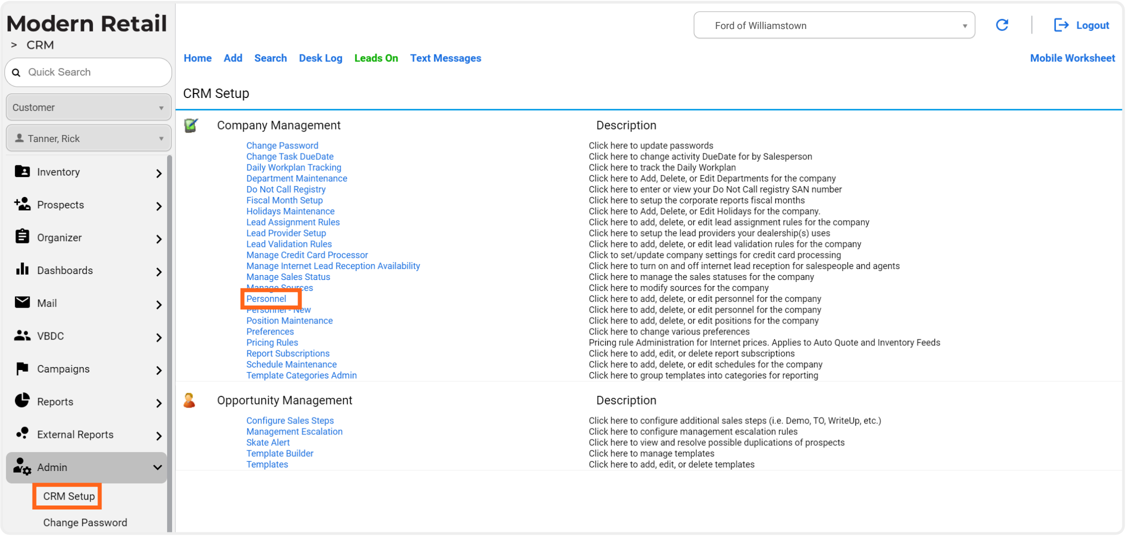
Dealership CRISP gives you an overall view of your dealership's phone performance.

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

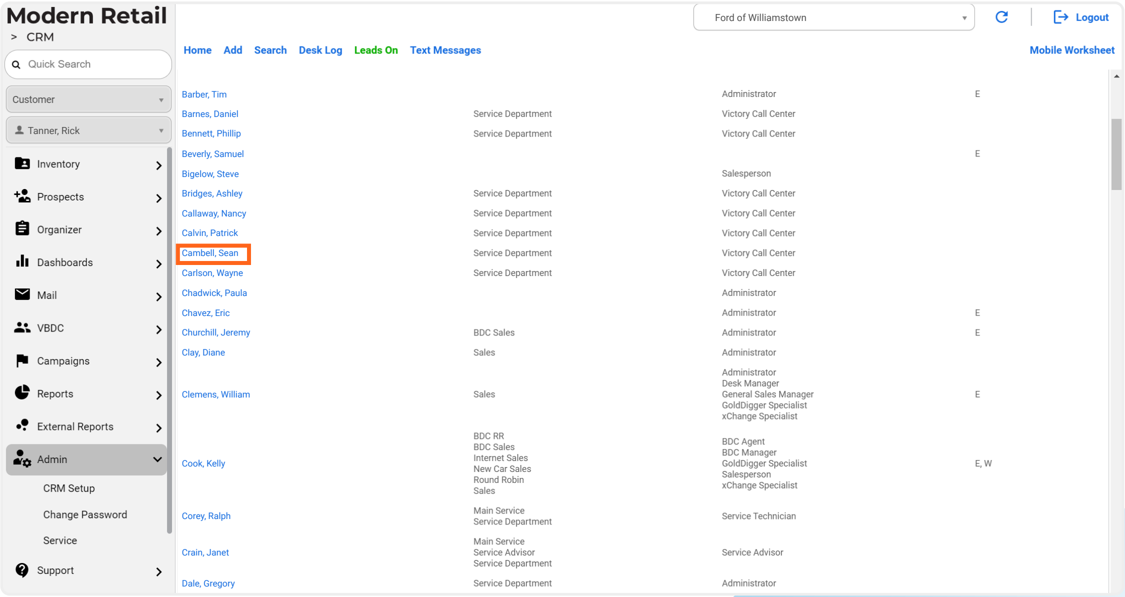
SET UP

CLICK TO CALL

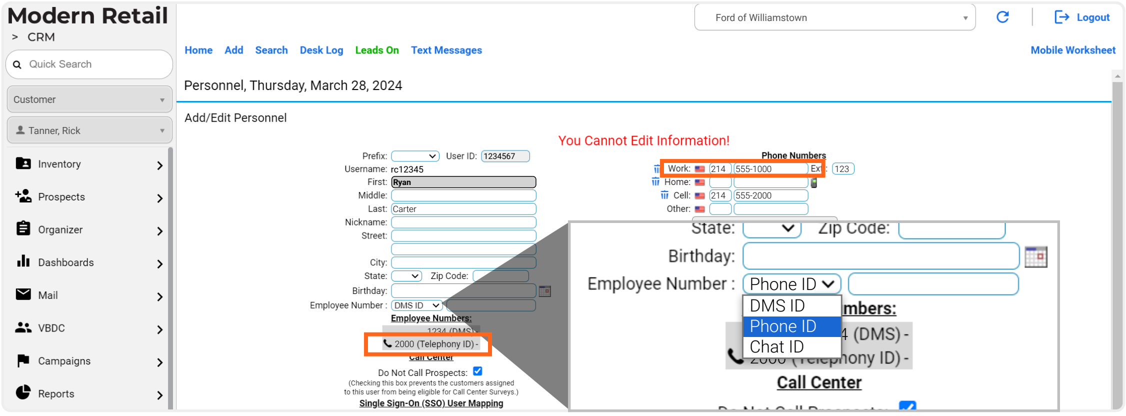
1 In the Elead system, go to **Admin** then **CRM Setup**. Click **Personnel**.



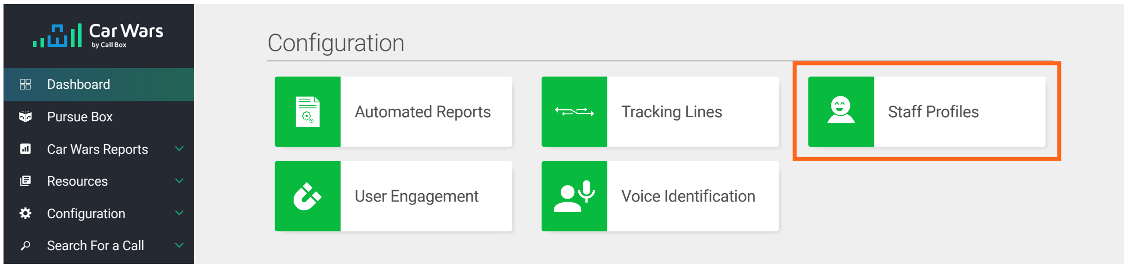
2 Select an agent.



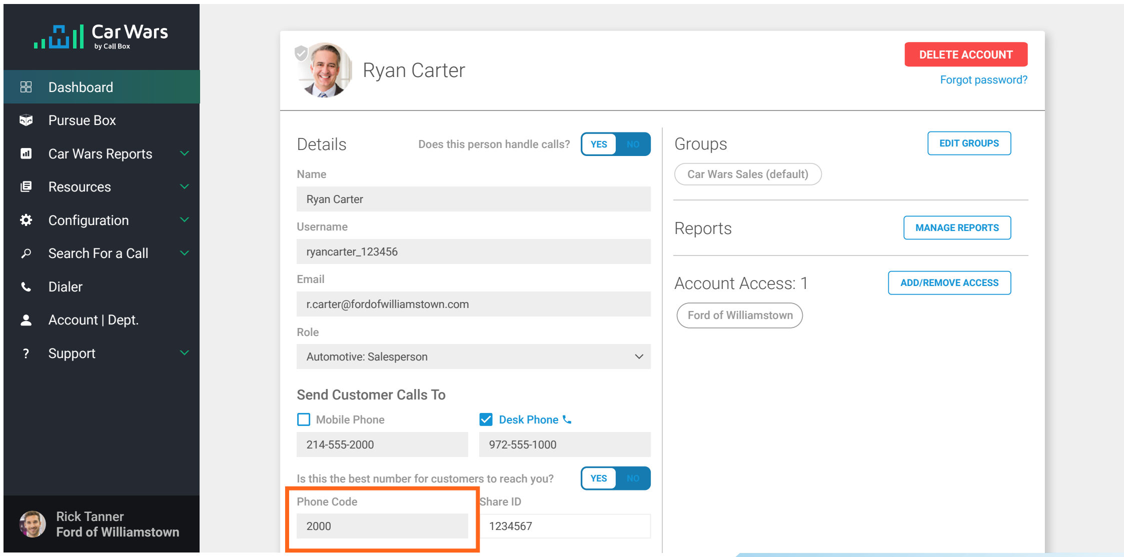
3 Make sure there is at least one phone number under each person and that their Car Wars phone code is listed as their Telephony ID.
We do suggest adding both their desk phone and cell phone in case they would like to make calls away from their desk.



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



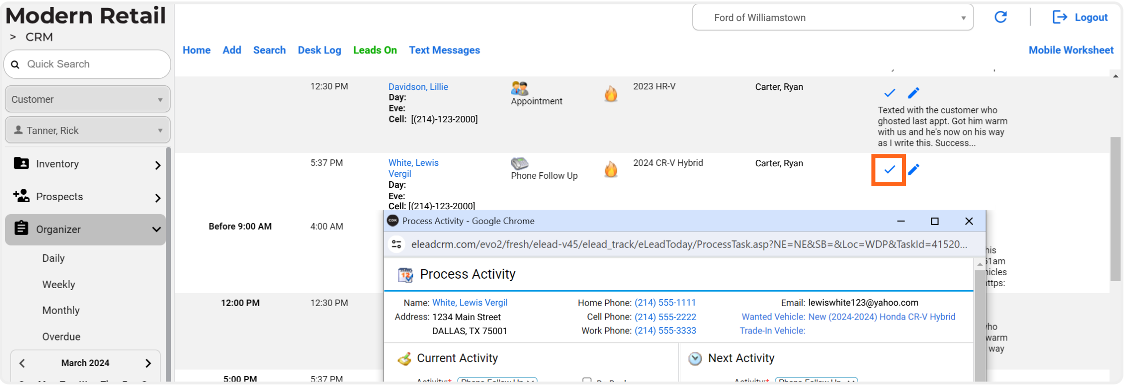
5 Find the four digit phone code in front of each person's name in the Staff list. This is the code that needs to be entered in Elead as the Telephony ID.



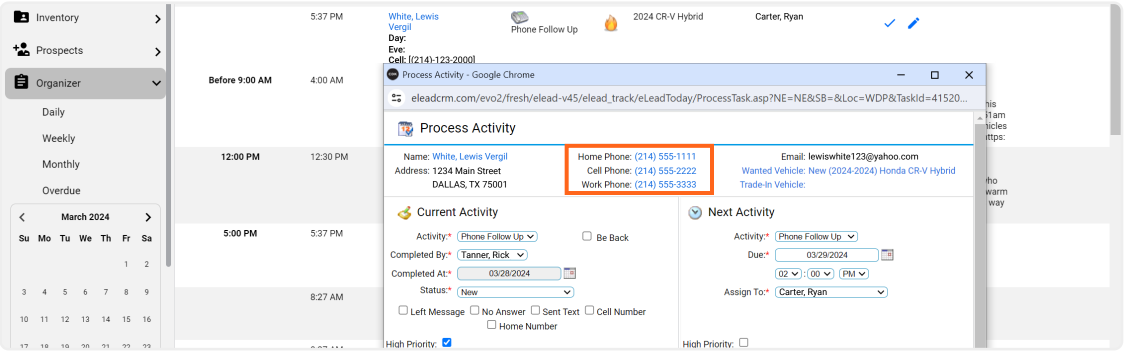
HOW TO MAKE
OUTBOUND CALLS

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**.



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

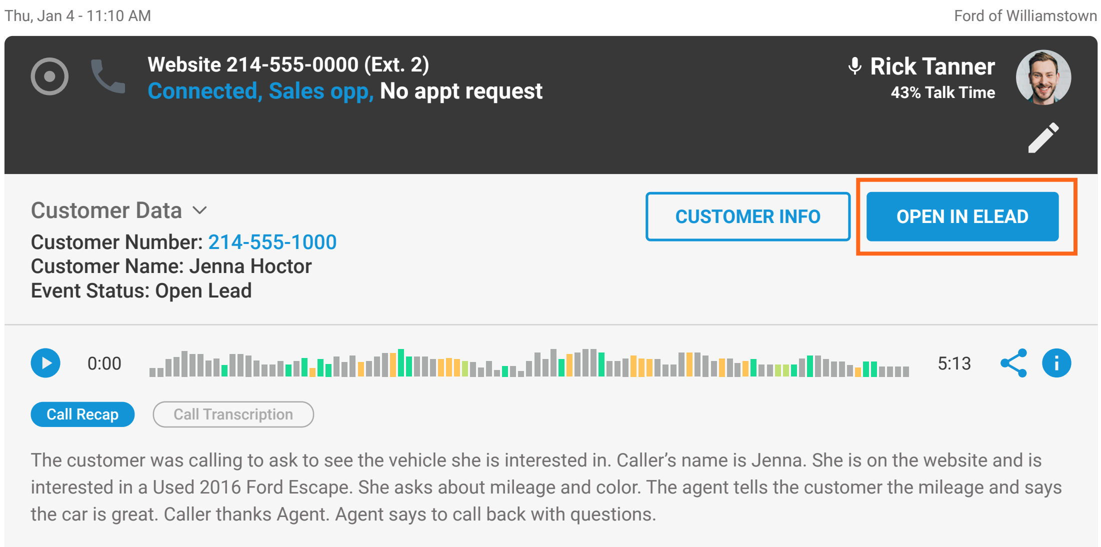


4 Outbound call data is pushed into the prospect record.

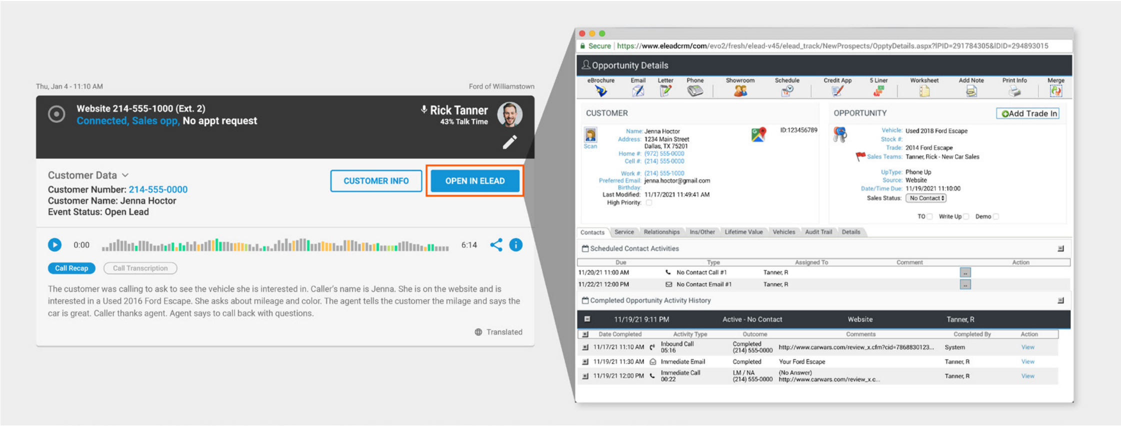
IN-DEPTH

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.

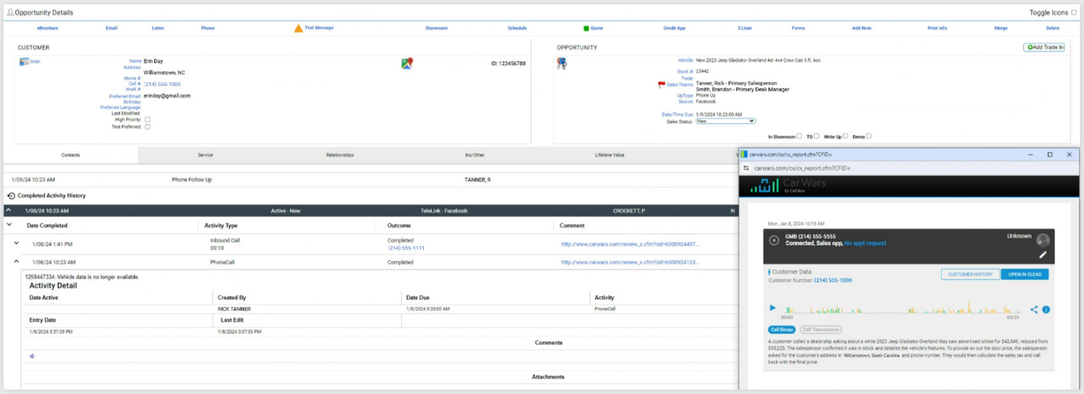


2 If a call has been logged, the customer or prospect record will automatically open.



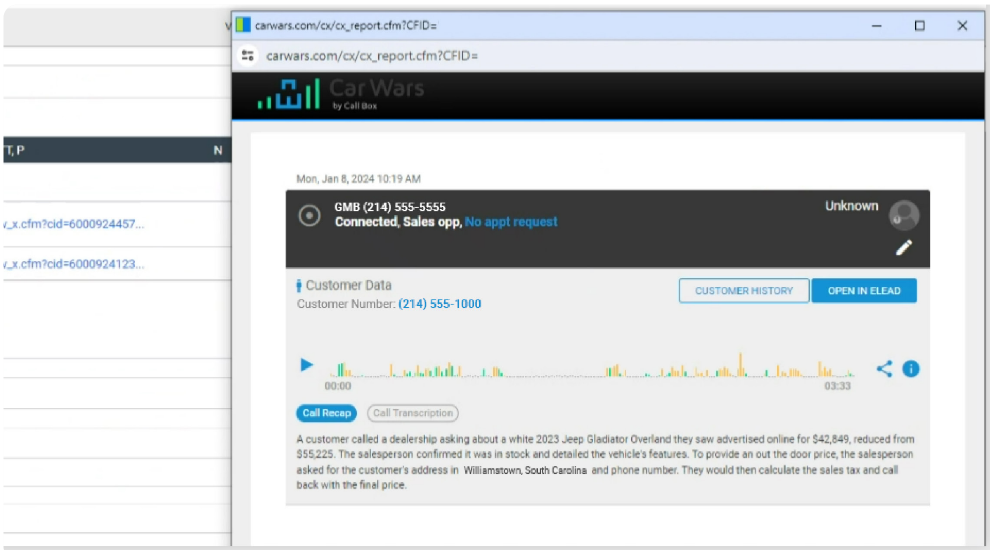
3

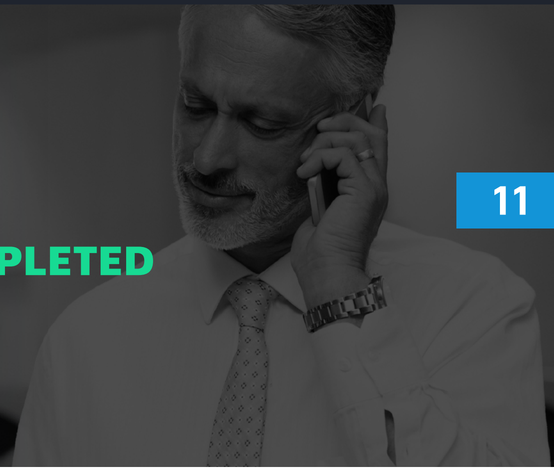
View text message details in the prospect record. We also include the link to open it in the Text Messages platform of Car Wars.



4

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

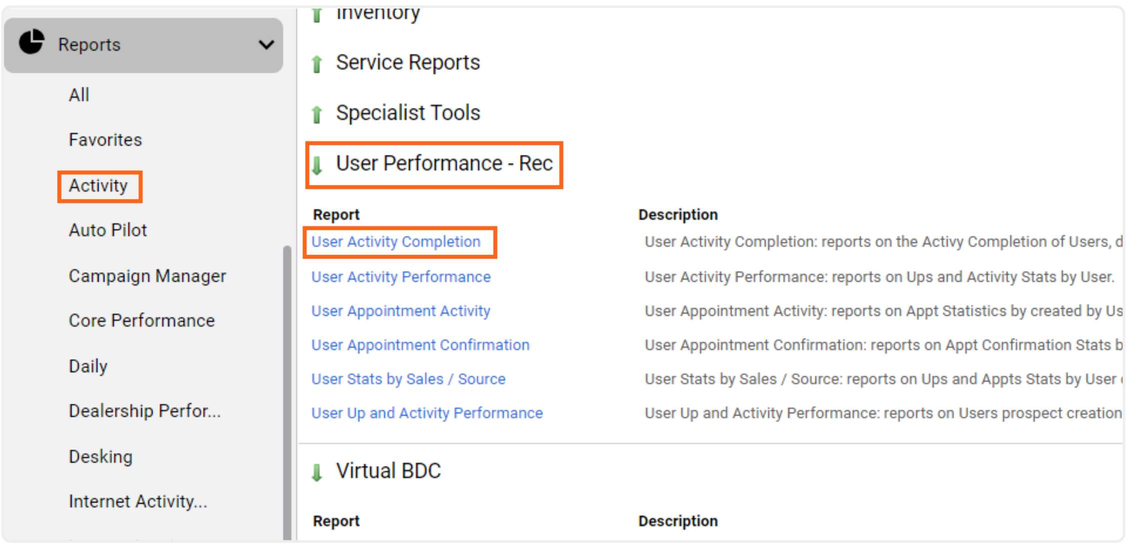




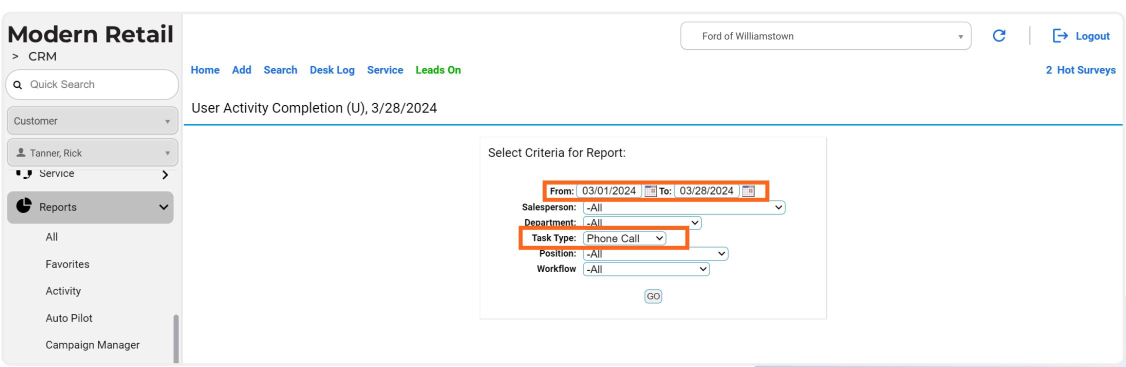
MANAGE SCHEDULED AND COMPLETED TASKS

1 Choose the **Reports** tab.

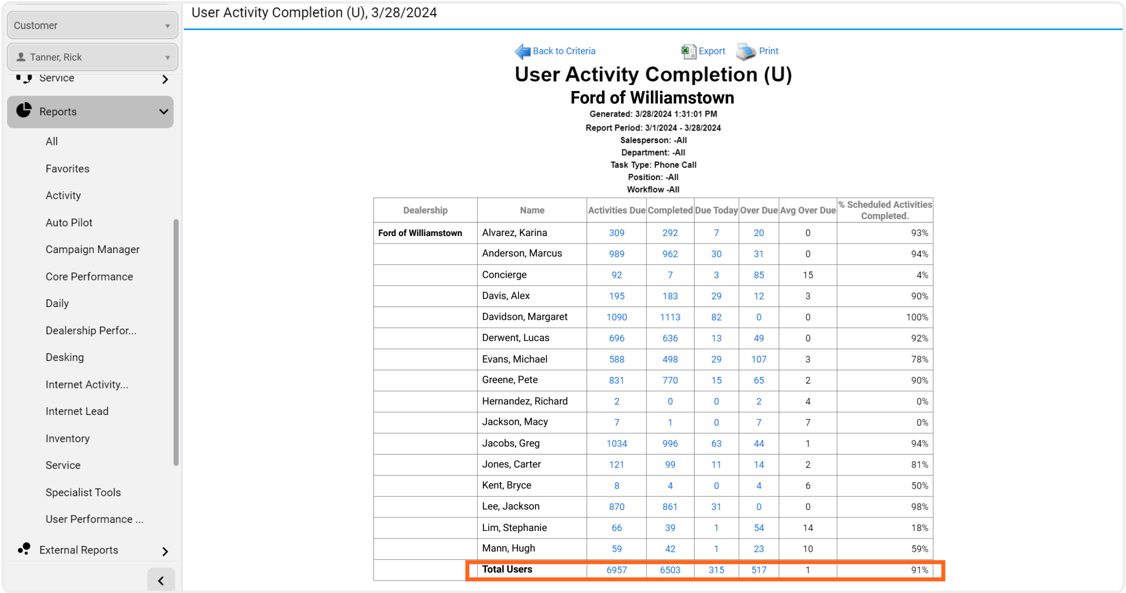
2 A list of subfolders will appear. Click on **Activity**, **User Performance - Rec** then **User Activity Completion.**



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



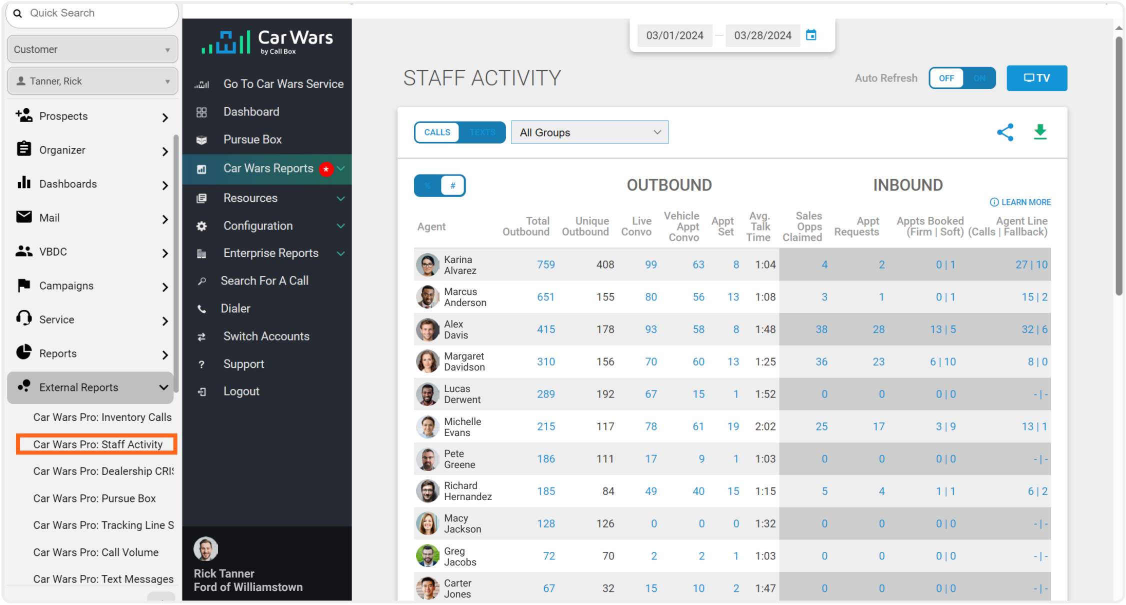
4 Scroll to the bottom for the total number of **Completed Tasks** (in this case phone calls).



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%

5 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.



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

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