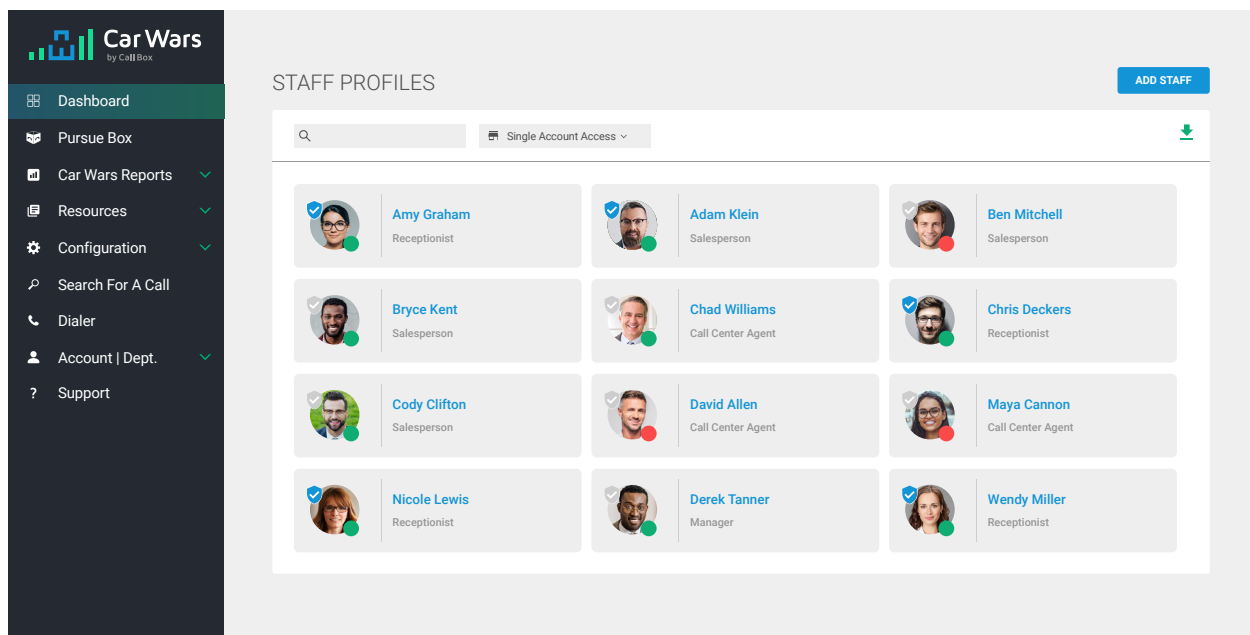




STAFF PROFILE MANAGEMENT HOW-TO-GUIDE

BEST PRACTICES FOR A SEAMLESS CAR WARS + GOTO INTEGRATION

- Ensure all GTC extensions are set up with a staff profile in Car Wars.
- When adding a new staff member's extension or when editing an existing staff member's extension in your GoTo phone system, update the staff member's profile in Car Wars as well.
- The fields below in a staff member's profile **MUST** be updated so calls to that Staff Member appear in Car Wars reporting, share to CRM, and are reviewed by Human Reviewers + Machine Learning.
 - Staff Member Name
 - Department
 - Extension
 - Car Wars Group
 - Phone Code / Third Party Share ID



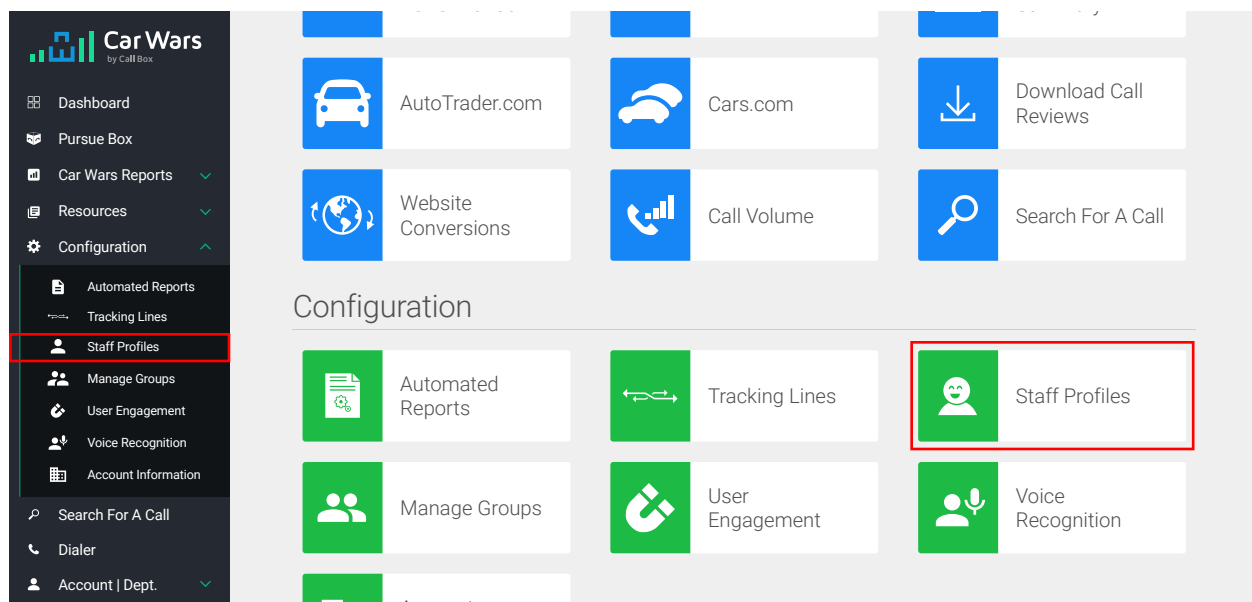
For calls to accurately report in Car Wars, extensions for **ALL** personnel in your phone system must be represented in a staff profile in Car Wars—this excludes non-personnel extensions (fax extensions, etc.).

Note: ANY time changes are made to extensions or personnel in your phone system it is important to update staff profiles in Car Wars.

HOW TO ADD A NEW STAFF MEMBER

- 1 Add the staff member in your GoTo Connect Phone System. Make note of their 4-digit extension.
- 2 Login to www.carwars.com.
- 3 Under *Configuration*, go to *Staff Profiles*, select *Add Staff* and input the required fields: Name, Email Address, Extension (this must match extension in GTC, Role, Department, Outbound line).

Note: Outbound Line for click-to-call is made via CRM. All outbound calls will still be captured via GoTo integration if made outside of click-to-call.

The image shows a 'Add Staff' modal form. At the top, it says 'Add Staff' with a close button. Below is a red warning: 'All new staff must be in your GoToConnect phone system. The name and extension you enter below MUST match the extension and the extension's label in GoToConnect.' The form has the following fields: Name (John Smith), Email (johnsmith@abchonda.com), Extension (1432) with a 'Phone Code Auto Generated' label, Automotive (Salesperson), Sales, and Outbound (ABC Honda (214) 555-1000). There is a checkbox for 'Click to grant administrative privileges.' and a blue 'CREATE' button at the bottom.

EDITING A STAFF MEMBER

If you have re-assigned an extension in GoTo to a new or different staff member, it is important the staff profile(s) in Car Wars are also updated.

You will not be able to enter an extension if it is already associated with another staff member. Simply remove the existing extension and then you will be able to assign it to the appropriate team member. For instance, in the example below, in order to assign Terry extension 1692, that extension must first be removed from Gary's profile.

STAFF PROFILES

ADD STAFF

Single Account Access ↓ ↓

Name (3rd Party Share ID)	Ext	Ext	Outbound Line	Email			
Gary Lane 4674679	1692	8892	Automotive: Sale	Sales	Sales Outbound Li	glane@abchond	
Terry Jameson 4334640	3100	6853	Automotive: Sale	Sales	Sales Outbound Li	tjameson@abch	
John Smith 4624616	1432	1785	Automotive: Sale	Sales	Sales Outbound Li	jsmith@abchon	

Must be removed from current user
before being added to another staff profile

REMOVING STAFF

Click the trash icon to delete the staff profile from your Car Wars account.

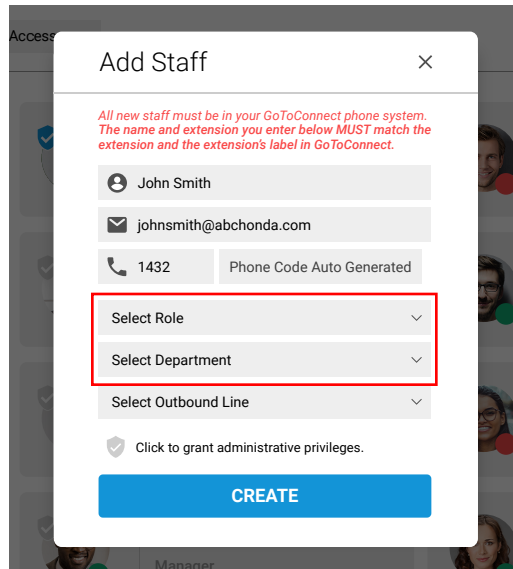
ADD STAFF

↓

Outbound Line	Email	
Sales Outbound Li	glane@abchond	
Sales Outbound Li	tjameson@abch	
Sales Outbound Li	jsmith@abchon	


MANAGING GROUPS


Each user that is added to Car Wars will be automatically assigned to a group based on the department that is selected. For example, if the Service Department is added, the staff member will be added to the Car Wars Service Group.




Add Staff ×

All new staff must be in your GoToConnect phone system. The name and extension you enter below MUST match the extension and the extension's label in GoToConnect.

 John Smith


 johnsmith@abchonda.com

 1432 Phone Code Auto Generated

Select Role ▾

Select Department ▾

Select Outbound Line ▾

 Click to grant administrative privileges.

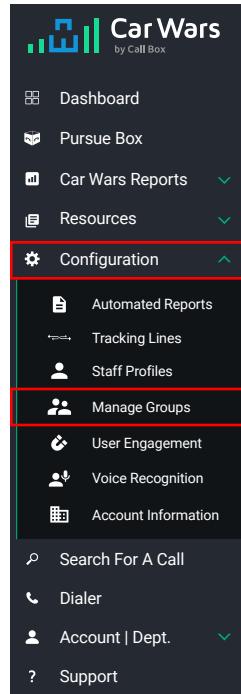
CREATE

Groups are important to see reporting by “Group.” If a staff member is not in the Sales or Service Departments, the user will not be assigned to a group. To see certain groups such as Parts, Reception, BDC, etc., new groups will need to be created.

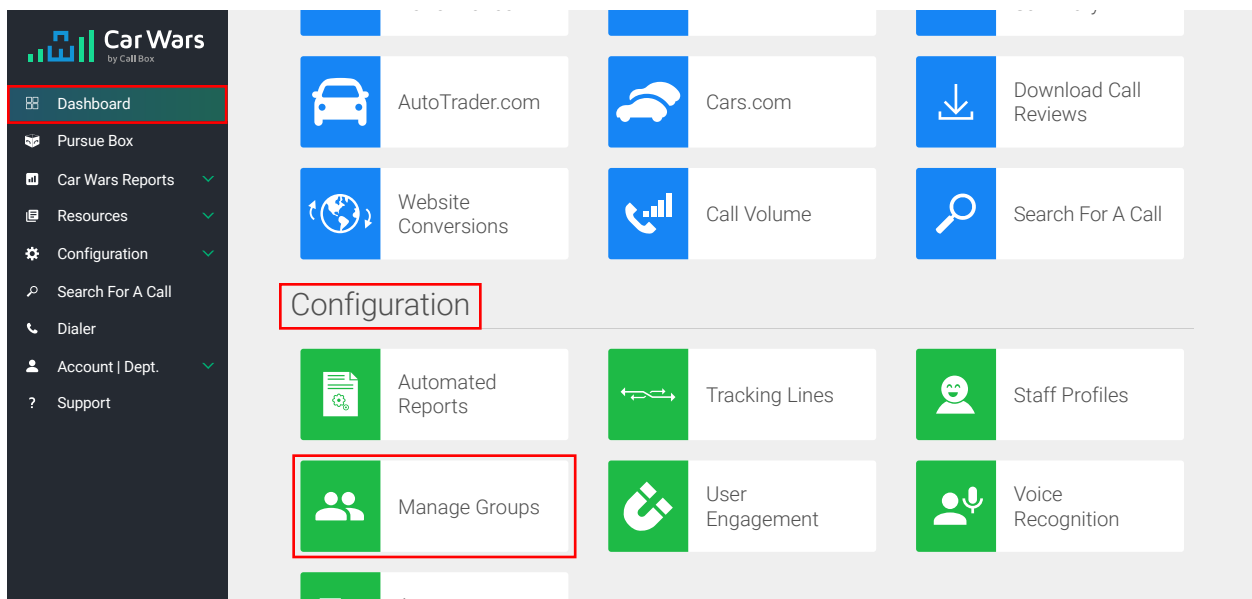


There are two ways to access groups:

1 Through the left side bar.



2 From the Dashboard.



Since there are default Sales and Service groups already made, any additional groups can be created. This allows you to filter certain reports by Group. Parts and Other groups will need to be created.

CREATING NEW GROUPS

To create a new group, select *Create New Group*.



Insert group name and press create. Repeat for any other groups you wish to create.




Group Recommendations – Parts, Other, Finance, etc.




ADDING/EDITING USERS AND GROUPS

Select the group you would like to add users to. Press *Edit* on the right side.


Car Wars Service (default) EDIT



Service Advisor 4
Car Wars Service (default)



John Anderson
Car Wars Service (default)




BDC Service 2
Car Wars Service (default)


Type, or search, for the name and press *Add Staff*.

Car Wars Service (default) ×


▼
ADD STAFF



Service Advisor 4
Car Wars Service (default)



John Anderson
Car Wars Service (default)



BDC Service 2
Car Wars Service (default)

Once completed, exit out of edit mode.



DELETING USERS FROM GROUPS

There are two ways to delete users from a group:

1 Using the edit button.

The screenshot shows the 'Car Wars Service (default)' group management interface. At the top right, there is an 'EDIT' button highlighted with a red box. Below the group name, three user cards are displayed: 'Service Advisor 4', 'John Anderson', and 'BDC Service 2', all associated with 'Car Wars Service (default)'. Each card has a blue circular icon with a white plus sign.

The second part of the screenshot shows the interface in 'edit mode'. A red text box at the top says 'Remove multiple users by clicking the "x" in edit mode.' with three red arrows pointing to the 'x' icons on the user cards for 'Service Advisor 4', 'John Anderson', and 'BDC Service 2'. The 'BDC Service 2' card is also highlighted with a red box. On the left, there is a search bar with 'Daisy Service BDC' and an 'ADD STAFF' button. A close button 'x' is in the top right corner of the edit mode panel.

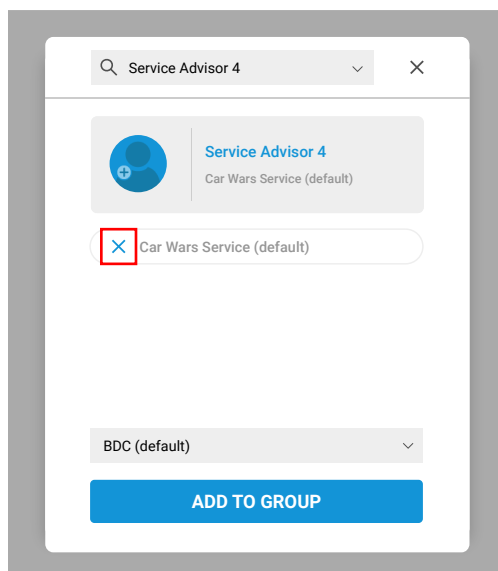
Once complete, exit out of edit mode.



2

Clicking on user's name.

To delete a user from a group, you can also click on their name and click "x" on the group name.



For questions or assistance, contact [Car Wars Support](#).

