MAXIMIZE YOUR Reynolds&Reynolds × Car Wars by Call Box INTEGRATION

BEST PRACTICE GUIDE

KEY STEPS FOR SUCCESS

1 Phone Lead Management

- Access the "Phone Log" from the communications panel to track inbound and outbound calls.
- Calls automatically match existing client records and unmatched calls can be manually assigned to new or existing clients.
- Ensure follow-up tasks are scheduled for every lead.

2 Using Click to Call

- Enable Click to Call in user profiles under "Administration" > "Security" > "Users."
- Click any phone number in FOCUS to make a call and track it within the system, ensuring all outbound calls are properly logged and reported.

3 Reporting

- Use the "Phone Summary Report" to view call statistics by user or dealership, including matched and unmatched calls, as well as call duration.
- The "Phone Call Validation Report" confirms phone calls align with scheduled activities and shows calls matched to clients.
- "Prospect Source Report" evaluates lead sources, showing how many prospects were generated by phone leads and how many converted to sales.

4 Set Up Click to Call

- Assign users their Click to Call Provider in their FOCUS profiles.
- Ensure telephony settings allow phone leads to automatically create prospects when no record exists.

REPORTS TO EXPLORE DAILY

- **Pursue Box:** Salvage missed opportunities
- **Dealership CRISP Report:** Analyze overall phone performance
- **Staff Activity:** Track agent performance and engagement

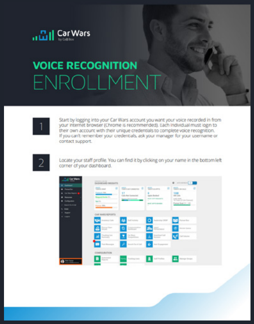
More Car Wars Resources to Improve Call Management and Phone Processes

Full Reynolds & Reynolds Integration Guide

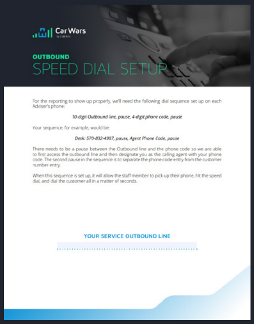
What is CRISP?

How to Warm Transfer

Voice Recognition Enrollment Guide



Outbound Speed Dial Setup



Call Connection Tips

214-446-7867 | help@carwars.com