



BEST PRACTICES

A grayscale photograph of a man with a beard and short hair, wearing a suit and tie, holding a mobile phone to his ear and smiling. The image serves as the background for the document.

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MANAGE THE CALL LOG

1

Click on the Phone Icon in the Top Menu Bar to access the Call Log. If you do not see the Phone Icon, please ask your DriveCentric team to add it.

- Toggle the filters on the top left to “Inbound” and select your desired date range.
- Listen to the call by clicking on the “Play” button under Call Recording column or view the Car Wars Call Summary under the Summary column.

View (2/24) Calls

Unanswered

Department: All

Open

10/24/2024

10/24/2024

10/24/2024

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Unanswered

Department: All

Unanswered (2) / Sales / Online Listings / Sales / New Leads / 10/24/2024

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Department: All

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- If it says “Add Customer” then the customer has not been created.
- If it says “Add Deal” under the Deal Column, this means we have a customer record for the phone number but **not an active lead** associated with that number. Clicking “Add Deal” will allow you to create a new Phone Lead or to Merge the call into an existing lead through DriveCentric’s merge function.
- A daily check by a manager to ensure there are no calls labeled “Add Customer” or “Add Deal” is recommended.
- If Voice Recognition is active and assigning agents to calls, you’ll see the associated agent under the Sale 1 column.

Find an existing lead.

Scroll down to "Inbound Call".

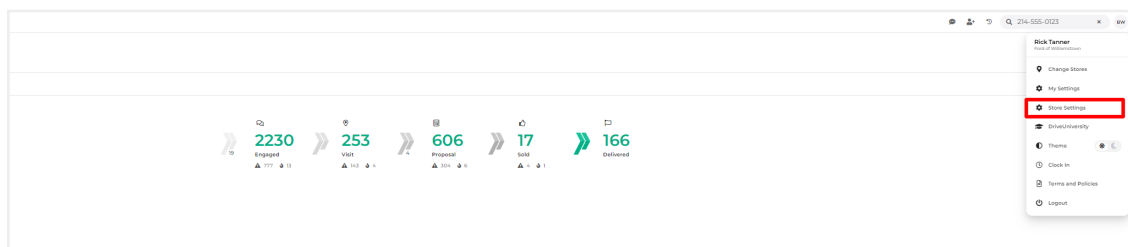
Select the Play button to listen to a recorded call or click Call Summary to read a summary of the call.

CALL SOURCE DEAL	📄 Note - Melissa McCarthy - Today at 10:36 AM loretta is the wife would like for me to call her at 214-123-4567 with the numbers so that she could drive her daughter up to test drive the car.		CALL RECORDING Play 00:00:01
MarketingLead (Carlson) (Online Chatting) (Sales) Open	🔴 Ignored Conversation - Melissa McCarthy - Today at 9:01 AM		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	💬 Text From Customer - Melissa McCarthy - Yesterday at 7:42 PM (214) 123-4567 Liked "Thank you for opting in mister Jim! You can text m..."		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	🔍 Text To Customer - Melissa McCarthy - Yesterday at 7:36 PM (214) 967-4321 Thank you for opting in mister Jim! You can text me here or give me a call at 214-345-6789! Speak to you soon :)		▶️ Recording started 00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	🔍 Text To Customer - Melissa McCarthy - Yesterday at 7:36 PM (214) 967-4321 Thank you for opting in mister Jim! You can text me here or give me a call at 214-345-6789! Speak to you soon :)		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	📄 Note - Melissa McCarthy - Yesterday at 7:35 PM called in-would like numbers works out before coming in bc he is coming from SC		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	📞 Inbound Call - Yesterday at 7:34 PM Inbound ▶️ 0:00 / 7:07 🔊 🔇		▶️
MarketingLead (Carlson) (Online Chatting) (Sales) Open	📄 Note - Melissa McCarthy - Yesterday at 7:33 PM		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	📄 Note - Melissa McCarthy - Yesterday at 7:33 PM		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	📄 Note - Melissa McCarthy - Yesterday at 7:33 PM		Play 00:00:00
MarketingLead (Carlson) (Online Chatting) (Sales) Open	📄 Note - Melissa McCarthy - Yesterday at 7:33 PM		Play 00:00:00
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SETUP CLICK TO CALL

1

Go to the “Store Settings” section of DriveCentric.

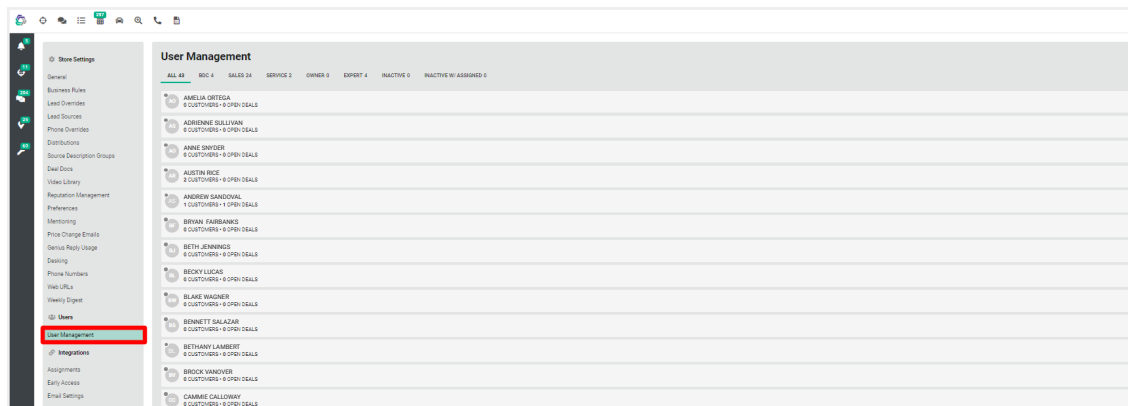


2

Select “User Management”.

3

Select a user you would like to configure click to call for.



4

Ensure the salesperson has an updated phone number.

6

The screenshot shows a user profile for Rick Tanner. The 'Integrations' tab is selected. Two fields are highlighted with red boxes: 'CarWars User Code' with a value of '1234' and a 'DELETE' button, and 'CarWars Agent Phone Number' with a 'SAVE' button. At the bottom of the modal are 'CANCEL' and 'UPDATE' buttons. The background shows a list of inactive salespeople.

5

Ensure the salesperson has an updated phone number.

- Add the salesperson's Car Wars Phone Code* under the Car Wars User Code section.
- If your dealership has agent lines, you can add the salesperson's agent line as the Car Wars Agent Number.

***NOTE:** You can find the Car Wars User Code in the salesperson's Car Wars Profile by logging into Car Wars, selecting "Staff Profiles" and selecting the desired staff member. You will find a four-digit phone code in their profile.

IMPORTANT: Do not include hyphens when entering the Car Wars Agent Line. Including hyphens will interfere with texting functionality.

MAKE A CLICK TO CALL

1

Within a Customer profile, ensure the “From” number belongs to the phone in which you use to call, and then click the “CALL” button.

The screenshot displays the Car Wars CRM interface for a customer profile named Rick Tanner. The profile header includes a profile picture, name, location (Ford of Williamstown), status (Engaged), and vehicle information (2021 Subaru Forester, #PTR1335). The 'Activity' tab is active, showing a list of activities. The 'CALL' button is highlighted with a red arrow. The 'Add' section on the right includes options for Vehicles, Trade In, Credit App, and Actions (Check In, Documents, Mark as Sold, Snooze, Dead). The 'PAST' section shows a 'Video Task' and a 'Phone, Text, Video Touchpoint'.

Activity Conversation Open Deals Value

NOTE **CALL** EMAIL TEXT VIDEO TASK APPT

(214) 123-4567 - mobile From Mobile: (214) 456-7890 **CALL**

PLANNED

Video Task • Friday at 7:00 AM

Send alternative vehicle

Phone, Text, Video Touchpoint • James Zimmerman • Today at 7:03 AM

Day 3 - Engaged Status - Touchpoint. Day 3 - Engaged Status - Touchpoint

Call - Text - Video - Edit - Delete

PAST

ALL 4 TASKS 1 APPTS 0 NOTES 1 SERVICE 0 PROPOSALS 0 3RD PARTY 0 LOGS 8

Inbound Call • Yesterday at 11:01 AM

Add

Vehicles

Trade In

Credit App

Actions

Check In

Documents

Mark as Sold

Snooze

Dead