



TEKION

# BEST PRACTICES



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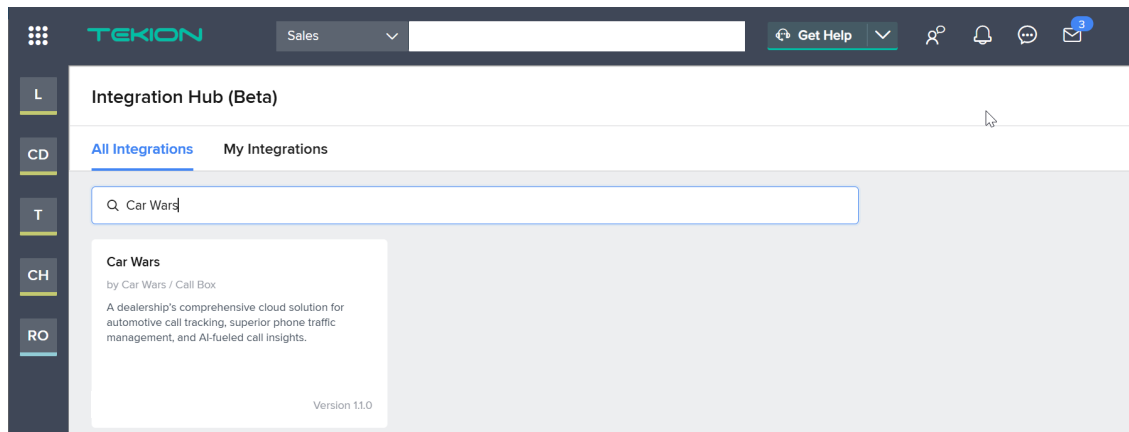
▶ **CALL ACCESS & FILTERING**

# SETUP & ACTIVATION

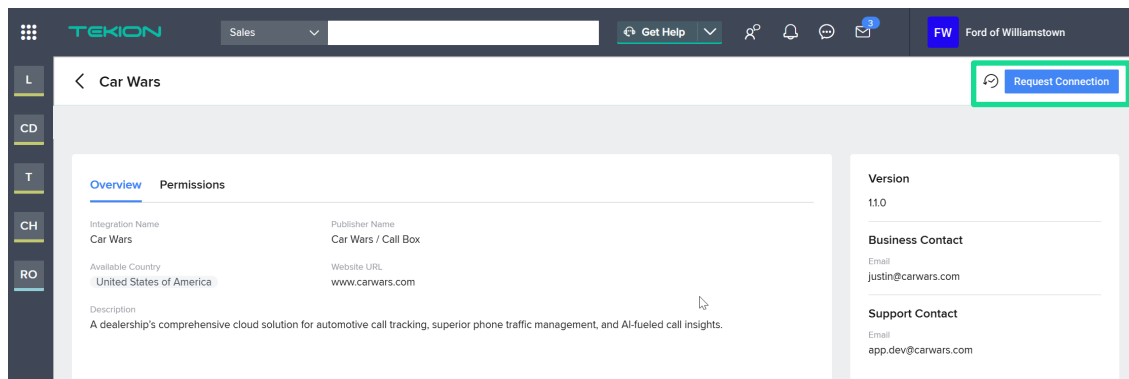
1

Enable Car Wars in Tekion

- Navigate to Integrations Hub in Tekion.
- Locate and select Car Wars from the list of telephony providers.



- Select "Request Connection". A request will be sent to Car Wars to be approved.



## 2

### Dealer ID & User Matching

- Agents' emails must match between Car Wars staff profile and Tekion's Employee Onboarding section.

## 3

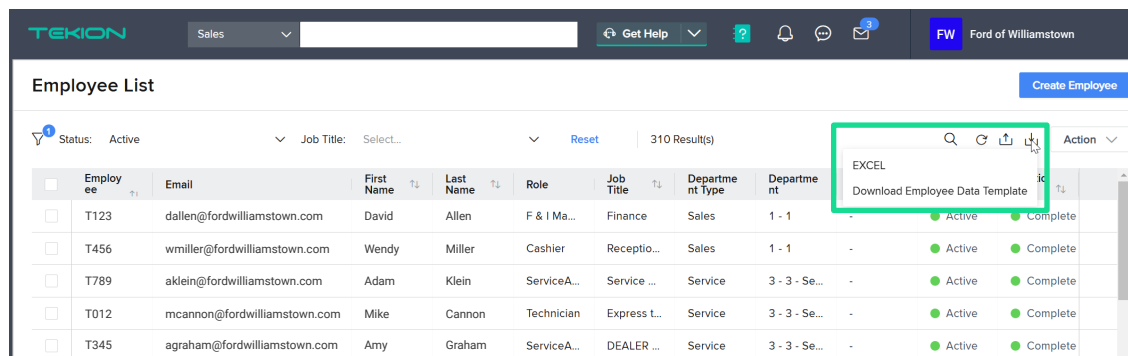
### CTC User Setup

- Dealers must submit a case to Tekion to set up their agents with Click to Call (CTC) functionality. To create this ticket dealers can email [integrationsupport@tekion.com](mailto:integrationsupport@tekion.com).
- Self-service setup is not available (except for GTC accounts).

## 4

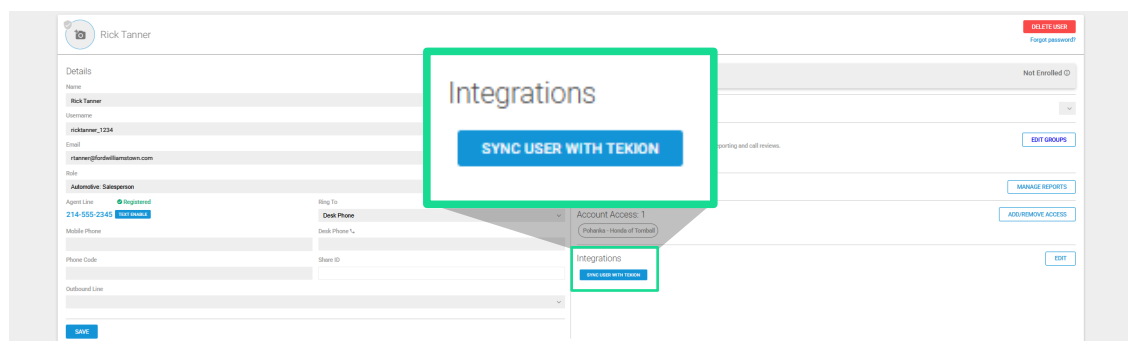
### Tekion Integration Configuration

- In order for outbound phone calls to report correctly in both Tekion and Car Wars, the staff profiles from Car Wars need to sync the Tekion Employee list. The login email for the employees in Tekion need to match the emails in the Car Wars staff profiles. Car Wars can do an initial sync for all employees if the Tekion admin from the dealerships provides the the employee list that can be downloaded from Tekion.com.



| Employee | Email                        | First Name | Last Name | Role        | Job Title    | Department Type | Department    | Status | Complete |
|----------|------------------------------|------------|-----------|-------------|--------------|-----------------|---------------|--------|----------|
| T123     | dallen@fordwilliamstown.com  | David      | Allen     | F & I Ma... | Finance      | Sales           | 1 - 1         | Active | Complete |
| T456     | wmiller@fordwilliamstown.com | Wendy      | Miller    | Cashier     | Receptio...  | Sales           | 1 - 1         | Active | Complete |
| T789     | aklein@fordwilliamstown.com  | Adam       | Klein     | ServiceA... | Service ...  | Service         | 3 - 3 - Se... | Active | Complete |
| T012     | mcannon@fordwilliamstown.com | Mike       | Cannon    | Technician  | Express L... | Service         | 3 - 3 - Se... | Active | Complete |
| T345     | agraham@fordwilliamstown.com | Amy        | Graham    | ServiceA... | DEALER ...   | Service         | 3 - 3 - Se... | Active | Complete |

- If the initial employee list has been synced and a dealership employee needs to be added and synced, a dealership admin just needs to make sure the employee email matches in both Car Wars and Tekion and then they can click "Sync User With Tekion" from the Car Wars staff profile page.



Details

Name: Rick Tanner

Username: ricktanner\_1234

Email: rtanner@fordwilliamstown.com

Role: Automotive Salesperson

Agent Line: 214-555-2345

Mobile Phone: [Redacted]

Phone Code: [Redacted]

Outboard Line: [Redacted]

Integrations

SYNC USER WITH TEKION

Account Access: 1 (Policies - Heads of Toolbars)

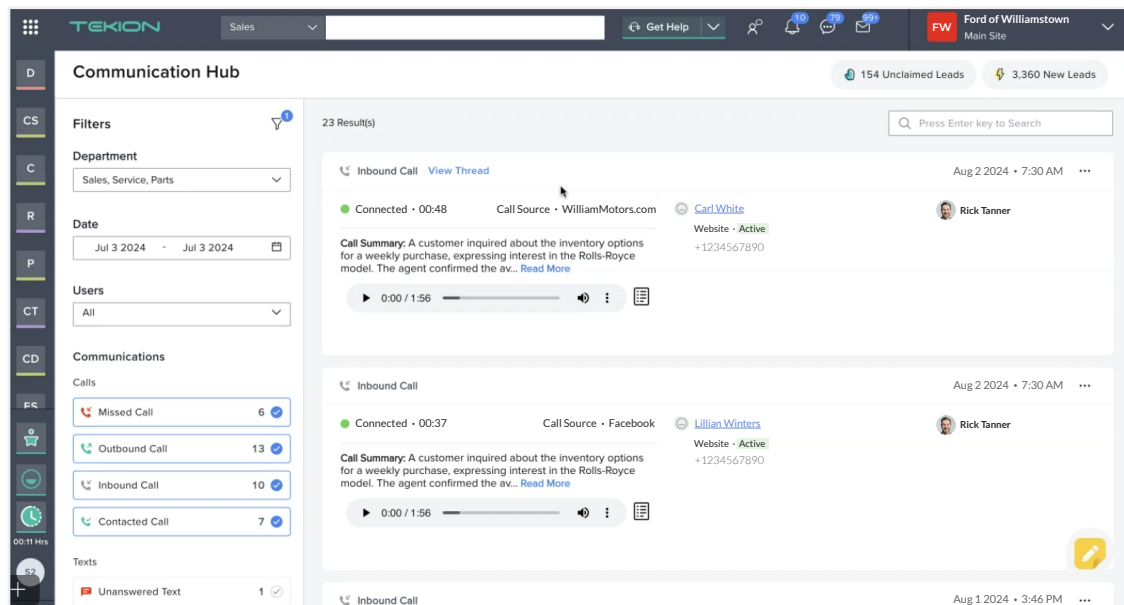
Integrations (Link)

# PHONE LEAD MANAGEMENT

1

Calls in **Tekion's Communication Hub** are **automatically attached** to existing leads when possible.

- Both **inbound and outbound calls** appear in the default Communication Hub view.
- Dealers can apply filters to narrow call results.



2

Lead Matching & Creation

- Car Wars sends **phone call recaps** to Tekion CRM, ensuring lead details are logged.
- If no matching lead exists, users can manually create a new lead within Tekion.

# USING CLICK TO CALL

**1**

Agents can **initiate outbound calls** through Click to Call within Tekion.

- Car Wars supports **desk phone and mobile call initiation**.

# CALL ACCESS & FILTERING

1

Users can access calls via **Tekion's Communication Hub**.

- Calls automatically attach to existing leads, ensuring sales teams can track engagement.
- **Dealers cannot listen to call recordings directly within the lead** unless they have a GTC account.

