



Car Wars
by Call Box

VinSolutions
Make every connection count.

BEST **PRACTICES**



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HOW TO ACCESS INBOUND CALLS

1

Login to VinSolutions. Click **Monitored In** within the main dashboard.

The screenshot shows the VinSolutions dashboard with the 'Daily Activity' section. The 'Calls' section has three tabs: 'All', 'Matched', and 'Unmatched'. The 'Monitored In' tab is highlighted. The 'Calls' section also shows a table with the following data:

Category	Count
Inbound	2
Outbound	121
Monitored In	10
Monitored Out	3
VCT In	1
VCT Out	0
CDR	0

The 'Emails' section shows:

Category	Count
Inbound	1
Outbound	51
Read	1290
Undelivered	0

The 'Text Messages' section shows:

Category	Count
Inbound	15
Outbound	42

The 'Visits' section shows:

Category	Count
2U/1N Appts	3
Visits	2
Demos	0
Mgr TOs	0

The 'Appointments' section shows a table with the following data:

Time	Rep	Customer	Vehicle	Conf
10:00am	R Tanner	Juan Richardson Sales Appointment Dealership	(New) 2024 Subaru Forester [RH502627]	Conf
10:30am	J Hernandez	Gregory Morris Sales Appointment Dealership		Conf
4:30pm	B Mitchell	Janis Harris Sales Appointment Dealership	(Used) 2017 Toyota Corolla [M [RH472467A]	Conf

2

You will see three tabs on inbound calls: All, matched, and unmatched.

The screenshot shows the VinSolutions dashboard with the 'Daily Activity' section. The 'Calls' section has three tabs: 'All', 'Matched', and 'Unmatched'. The 'All' tab is highlighted. The 'Calls' section also shows a table with the following data:

Category	Count
Inbound	2
Outbound	121
Monitored In	10
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3

To listen to calls, click on the speaker.

4

The screenshot shows a CRM dashboard with a top navigation bar including CRM, Inventory, Desking, Communications, Websites, VinLens, Insights, and Settings. Below this is a sub-navigation bar with Dashboard, Recent, Tasks, Calendar, Email, Leads, Add Customer, Customers, Letters, and Links. The main content area is divided into several sections:

- Filters:** From (05/06/2024), To (05/06/2024), Types (Phone), Direction (Inbound). There are also tabs for Today, Yesterday, Last 7 days, MTD, and LM.
- Dealerships:** Tacoma Subaru.
- Groups:** Groups.
- Users:** Users.
- Inbound communications (18):** A table with columns: Type, Date, Customer, Dealer, User, Call duration, and a speaker icon. The first row shows a call from Cynthia Torres on 5/6/24 at 1:28 PM, with a duration of 1:01. The second row shows a call from an Unknown Name on 5/6/24 at 12:53 PM, with a duration of 0:12. The speaker icon in the first row is highlighted with a red box.
- Daily Activity (All):** A section with a warning icon and text: "This screen has paused refreshing click HERE to". It contains two sub-sections:
 - Calls:** A table with columns: Inbound (2), Outbound (121), Monitored In (10), Monitored Out (3), VCT In (1), VCT Out (0), and CDR (0).
 - Emails:** A table with columns: Inbound (1), Outbound (51), Read (1290), and Undelivered (0).
- Appointments:** A table with columns: Time, Rep, and Customer. It shows appointments for 10:00am, 10:30am, and 4:30pm.

4

Clicking on the call will direct you to the Car Wars platform.

The screenshot shows a call log entry for a call on Monday, May 6 at 11:42 AM. The call is from Google/Yext/Social 214-555-0000 (Ext. 1 Sales) and is connected to Alex Hirsch. The call status is "Connected, Sales opp, No appt request".

Below the call log, there is a section for "Customer Data" with the following information:

- Customer Number: 469-555-1000
- Customer Name: Mike Kerner
- Event Status: Open Lead

There are two buttons: "CUSTOMER INFO" and "OPEN IN VIN".

Below the customer data, there is a call playback interface with a play button, a progress bar, and a timestamp of 0:00. There are also buttons for "Call Recap" and "Call Transcription".

The call transcript reads:

The customer was calling to: inquire about the availability of the pre-owned 2016 Ford Escape he saw on Auto Trader. He will come to the dealership if the price is suitable. The agent tells the customer: offers an appointment to visit the dealership if the vehicle is available. Agent tells the customer that the vehicle has been sold. The result of the call was: the customer thanks him and the call ends. No visit requested/mentioned but no agreement.

HOW TO CREATE PROSPECTS FROM AN EXISTING CALL

1

From the **Unmatched** bucket, click the ellipsis and select **Match to customer** to log a customer opportunity from a phone call.

Inbound unmatched communications (21)

All Matched **Unmatched**

Type	Date	Customer	Dealer	User	Call duration	Details	...
Phone	5/23/24 12:53 PM	Unknown N... Unmatched	Bo...	Cri...	7:44	Details	...
		Marketing provider: Google My Business - Hyundai Service					
Match to customer							

2

If the lead is found, select the customer to add from the list.

CRM Inventory Desking Communications Websites VinLens Insights Settings

Dashboard Recent Tasks Calendar Email Leads Add Customer Customers Letters Links

Match to customer - Ford of Williamstown

4695550000 Search

Results (40)

Suzie Reynolds Active Lead 07/07/21
Jacksonville, FL 12345 (incomplete address)
(469) 555-2... sreyolds@... Bryce Kent

Roy Price Sold Lead 04/24/18
1234 Pacific Blvd ... (469) 444-3... (469) 333-0000

Daily Activity (All)

This screen has paused refreshing click [HERE](#) to res

Calls		Emails	
Inbound	2	Inbound	1
Outbound	121	Outbound	51
Monitored In	10	Read	1290
Monitored Out	3	Undelivered	0
VCT In	1		
VCT Out	0		
CDR	0		

Appointments

Time	Rep	Customer
10:00am	R Tanner	Juan Richardson Sales Appointment Dealership
10:30am	J Hernandez	Gregory Morris Sales Appointment Dealership
4:30pm	B Mitchell	Janis Harris Sales Appointment Dealership

Activity

Rep	Ups	Cls
L Sanchez	6	0
D Turner	0	0

If the lead isn't found, click the blue **Add Customer** icon to log as a new prospect.

CRM Inventory Desking Communications Websites VinLens Insights Settings

Dashboard Recent Tasks Calendar Email Leads Add Customer Customers Letters Links

Match to customer - Ford of Williamstown

4695550000 **Search**

Results (40) 

Suzie Reynolds ...

Jacksonville, FL
12345
(incomplete address)

(469) 555-2... sreynolds@...

Active Lead 07/07/21
2014 Honda Odyssey
Bryce Kent

Roy Price ...

1234 Pacific Blvd ... (469) 444-3... (469) 333-0000 **Sold Lead** 04/24/18

Daily Activity (All)

This screen has paused refreshing click [HERE](#)

Calls

Inbound	2
Outbound	121
Monitored In	10
Monitored Out	3
VCT In	1
VCT Out	0
CDR	0

Emails

Inbound	1
Outbound	51
Read	1290
Undelivered	0

Appointments

Time	Rep	Customer
10:00am	R Tanner	Juan Richardson Sales Appointment Dealership
10:30am	J Hernandez	Gregory Morris Sales Appointment Dealership
4:30pm	B Mitchell	Janis Harris Sales Appointment Dealership

Activity

Rep	Ups
L Sanchez	6

CRM Inventory Desking Communications Websites VinLens Insights Settings

Dashboard Recent Tasks Calendar Email Leads Add Customer Customers Letters Links

Attach this lead to a new customer

Phone Number
4695550000

Home Work Cell

First Name Middle Name Last Name Suffix

Email Address (validate)

Address (show)

Bryce Kent

Sales Person 1 Sales Person 2

Vehicle Find...

Stock #

Vehicle Type: --None--

Lead Source -- Select --

Lead Type -- Select --

On showroom? ☐

Add Customer

Daily Activity

This screen has paused refreshing click [HERE](#)

Calls

Inbound	2
Outbound	121
Monitored In	10
Monitored Out	3
VCT In	1
VCT Out	0
CDR	0

Appointments

Time	Rep
10:00am	R Tanner
10:30am	J Hernandez
4:30pm	B Mitchell

Activity

Rep
L Sanchez
D Turner
J Cambell

HOW TO VIEW REPORTING

1

Clients must have a Car Wars phone code to have access to reports from Vin. You can do this by going to **Settings > ILM/CRM Settings > Click to Call Settings > Select Car Wars**.

Click To Call Settings

Car Wars

Dealer Settings

Car Wars Account # Click to Call ☒ Save

User Settings

Search Table

User Full Name User Settings

Car Wars Phone Code Save

2

To get to Car Wars Reports, click on **Insights > Third Party Call Reports > Car Wars Call Reports**.

Car Wars Reports

Car Wars Reports

Inventory Calls	Staff Activity	Dealership CRISP
Pursue Box	Communication Dashboard	Agent Performance
Review Queue	Tracking Line Summary	Car Wars Competitions
Download Call Reviews	Website Conversions	Call Volume
Text Messages	Search For A Call	User Engagement

Configuration

Automated Reports	Tracking Lines	Staff Profiles
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HOW TO MAKE OUTBOUND CALLS

1

In order for a salesperson to make a call to a prospect, he or she must go to the prospect's profile.

2

Then click on the call button.

Customer Dashboard

David Allen
(Individual)
H: (214) 111-2345
C: (214) 222-3456
dallen77@gmail.com
77 Main Street Dr
Dallas, TX, 75123

Search:    

 Appt Boarding Pass Template: "Appt Boarding Pass" [Dismiss](#) [Edit](#)
Assigned To: Rick Tanner

 Customer received a price down notification Please contact [Dismiss](#) [Edit](#)
Assigned To: Rick Tanner

 Click to add customer note

[Push To](#)

Status	Buyer/Co-Buyer	Created	Source	Vehicle
Active		5/23/24	Advantage Concepts	2024 Hyundai Kona
Bad		5/27/20	General Dealer.Com Website	
Lost	(B) Tim Packard	2/17/18	Dealer.com	2018 HYUNDAI ELANTRA

 2DMS
  Hot
  **Call**
 Email
  Appt.
  Note
  Lost
  Bad
  Sold
  Visit
  Letter
  Text

3

A new screen will pop up.

4

In the Agent Phone Number box, select the phone number you want the system to call you at, then select the customer's **Number to Dial**, and click **Call**.

9

Call Detail

https://apps.vinmanager.com/CallDetail

Tim Packard
Individual
1234 Main St
Dallas, TX 75201
M: (214) 555-2000
W: (214) 555-1000
H: (214) 555-0000
email: t.packard@gmail.com
altEmail:

2019 Ford F-150
Stock# 12345
VIN: ZYX098VUT765SRQP32
Ext color: Black
Engine: 3.3L Ti-VCT V6 Engine
Automatic 6-Speed
Lot Price: \$29,000
Internet Price: \$28,500

Notes & History | Appointments | Scripts | Survey

Outbound Text Message
8/28/19 1:13 pm by: David Allen

Inbound Text Message
8/28/19 1:11 pm by: David Allen

Outbound Text Message
8/28/19 11:07 am by: David Allen

Show More

Call Log

Agent Phone Number
(469) 555-2000

Extension

Number to Dial
✓ M: (214) 555-2000
W: (214) 555-1000
H: (214) 555-0000

Call Type
Outbound Inbound

Will Call Again in:
0 Days

Contacted? *
Yes No Voicemail

Notes *

CarWars Call Reports

Cancel Save

5

All outbound calls are also pushed into the **Monitored Out** page of the dashboard. You can view and keep track of your outbound calls by clicking on **Monitored Out**.

Dashboard | Recent | Tasks | Calendar | Email | Leads | Add Customer | Customers | Letters | Links

From: 05/06/2024 To: 05/06/2024 Types: Phone Direction: Outbound

Today | Yesterday | Last 7 days | MTD | LM

Dealerships: Tacoma Subaru Groups: Users:

Outbound communications (3)

Type	Date	Customer	Dealer	User	Call duration	Details
Call provider: CarWars	5/6/24 9:14 AM	Arthur Collins	Tacoma Sub...	Rick Tanner	1:24	Details
Call provider: CarWars	5/6/24 9:12 AM	Karen Baker	Tacoma Sub...	Rick Tanner	0:50	Details
Call provider: CarWars	5/6/24 8:59 AM	Jerry Rivera	Tacoma Sub...	Rick Tanner	1:19	Details

10 / page

Daily Activity (All)

This screen has paused refreshing click [HERE](#) to resume auto-refresh

Category	Inbound	Outbound	Monitored In	Monitored Out	VCT In	VCT Out	CDR
Calls	2	121	10	3	1	0	0
Emails	1	51	1290	0			
Text Messages							

Appointments

Time	Rep	Customer	Vehic
10:00am	R Tanner	Juan Richardson	Sales Appointment Dealership (New)
10:30am	J Hernandez	Gregory Morris	Sales Appointment Dealership
4:30pm	B Mitchell	Janis Harris	Sales Appointment Dealership (Used)

Activity

6

Outbound call audio is pushed into the customer record.

STAFF SETUP

1

Click on the **Settings** tab. Then select the **Users** tab and press **User List**.

The screenshot shows the CRM interface with the **Settings** tab selected. The **Users** dropdown menu is open, and the **User List** option is highlighted. The main dashboard displays various metrics including a Sales Funnel (15 Customers, 7 Contacted, 8 Appts Set, 3 Appts Shown, 2 Sold), Key Performance Indicators (18 Unanswered Comms, 1 Open Visits, 1 Pending Deals), and Internet Response Times (14 Total Leads). The right sidebar shows Daily Activity for Calls, Emails, and Text Messages, as well as a list of Appointments.

2

Here you will see your staff list. To view a specific profile, click on **edit**.

User List							
User Info	DMS ID	Inv. Access	Rcv Lds	CRM Access	Email Address	Last Login	
Group: Admin							
edit Ford Reception (fordreception) fordreception@fordofwilliamstown.com		Salesperson		Manager (view as) Operator Receptionist	fordreception@fordofwilliamstown.com	8/28/19 6:32p	
edit Christine Eaton (ceaton) ceaton@fordofwilliamstown.com		Account Manager		Admin (view as)	ceaton@fordofwilliamstown.com	8/28/19 2:40p	
edit Rick Tanner (rtanner) rtanner@fordofwilliamstown.com		Account Manager		Admin (view as)	rtanner@fordofwilliamstown.com	8/28/19 9:06p	
edit VinSolutions CRM (vinCRM) elead@drivebmw.bmwwilliamstown.com		Salesperson		Manager (view as)		8/28/19 12:57p	
edit Jim Oliver (joliver) joliver@fordofwilliamstown.com		Account Manager		Admin (view as)	joliver@fordofwilliamstown.com	8/28/19 1:10p	
edit Joel Burton (jburton) jburton@fordofwilliamstown.com	0001	Account Manager		Admin (view as)	jburton@fordofwilliamstown.com	8/28/19 1:54p	
edit Seth Newton (snewton) snewton@fordofwilliamstown.com	0002	Account Manager		Admin (view as)	snewton@fordofwilliamstown.com	8/28/19 9:10a	
Group: BDC							
edit Brittney Roberts (broberts) broberts@fordofwilliamstown.com	0003	Salesperson	Yes	Manager (view as) BD Agent, Salesperson	broberts@fordofwilliamstown.com	8/28/19 3:08p	
edit Kathy Wright (kwright) kwright@fordofwilliamstown.com	0004	Salesperson		User (view as) CSI Agent, Receive Service Dept Leads	kwright@fordofwilliamstown.com		
edit Samantha Kepler (skepler) skepler@fordofwilliamstown.com	0005	Salesperson	Yes	Manager (view as) BD Agent, Salesperson	skepler@fordofwilliamstown.com	8/28/19 9:31a	

3

For Click to Call, the most important fields to fill out within the user setup are the work and cell phone number. These will be the numbers the agent can choose from when making an outbound call.

11

The screenshot shows the 'User Settings' page for Christine Eaton. The 'Work Phone' and 'Cell Phone' fields are highlighted with a red box. The 'Hours' section shows a schedule for Thursday from 9:00 AM to 6:00 PM. The 'Email Signature' and 'Letter Signature' fields are also visible.

4

Similar to how to view reports, you must have a phone code set up for each user in order to use Click to Call. You can do this by going to **Settings > ILM/CRM Settings > Click to Call Settings > Select Car Wars**. Under **User Settings**, locate the employee by name and enter their Car Wars 4-digit phone code then click save.

The screenshot shows the 'Click To Call Settings' page. The 'Car Wars' tab is selected. The 'Dealer Settings' section shows 'Car Wars Account #' as 00001 and 'Click to Call' as enabled. The 'User Settings' section shows a search table with 'Christine Eaton' selected.

The screenshot shows the 'Click To Call Settings' page. The 'Car Wars' tab is selected. The 'Dealer Settings' section shows 'Car Wars Account #' as 00001 and 'Click to Call' as enabled. The 'User Settings' section shows a search table with 'Christine Eaton' selected, and the 'Car Wars Phone Code' field is set to 1234.