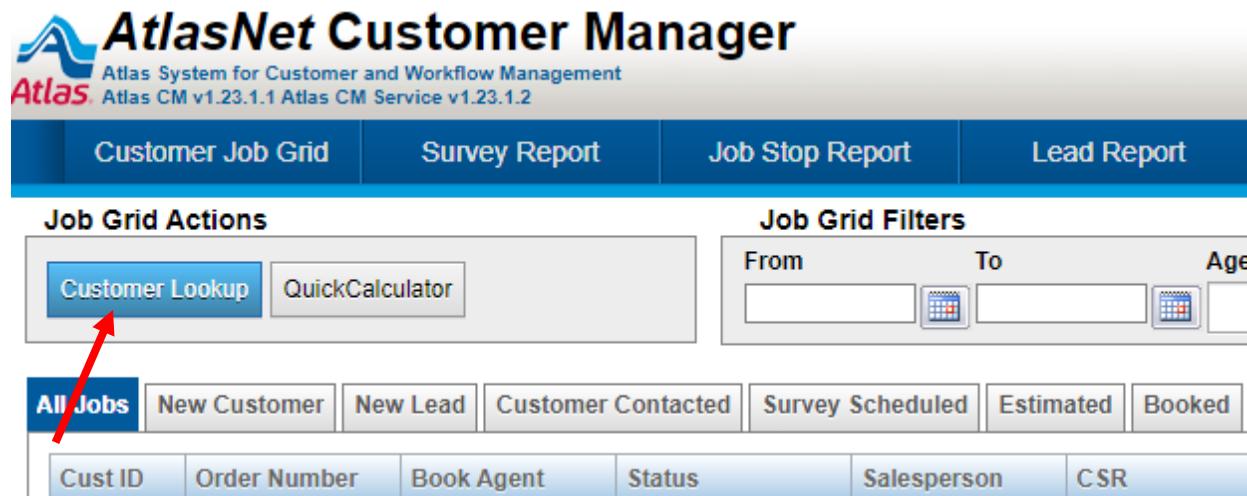


How to Add a New Customer into ACM

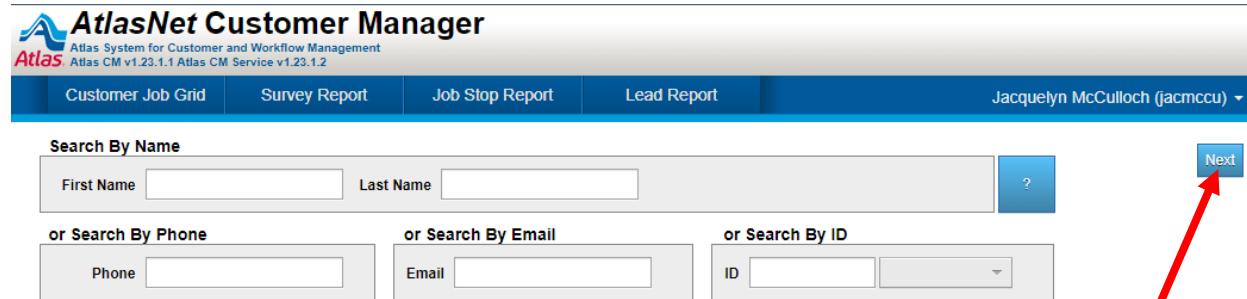
Please use the following instructions to add a new customer into ACM for all 80 series Private Client Business starting April 20th, 2020.

Step 1: Click the “Customer Lookup” button



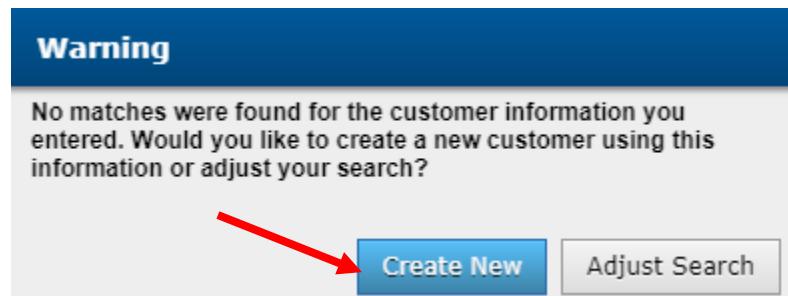
The screenshot shows the AtlasNet Customer Manager interface. The top navigation bar includes the Atlas logo, the system name 'Atlas System for Customer and Workflow Management', and the version 'Atlas CM v1.23.1.1 Atlas CM Service v1.23.1.2'. Below the navigation bar is a blue header bar with four tabs: 'Customer Job Grid', 'Survey Report', 'Job Stop Report', and 'Lead Report'. The 'Customer Job Grid' tab is selected. Underneath the header is a section titled 'Job Grid Actions' containing two buttons: 'Customer Lookup' (highlighted with a red arrow) and 'QuickCalculator'. To the right is a 'Job Grid Filters' section with fields for 'From' and 'To' dates, and buttons for 'Age', 'Last Contacted', and 'Last Survey'. Below these are two rows of buttons for filtering jobs: 'All Jobs' (highlighted with a red arrow), 'New Customer', 'New Lead', 'Customer Contacted', 'Survey Scheduled', 'Estimated', and 'Booked'. The bottom row includes buttons for 'Cust ID', 'Order Number', 'Book Agent', 'Status', 'Salesperson', and 'CSR'.

Step 2: Click the “Next” button



The screenshot shows the search interface of the AtlasNet Customer Manager. The top navigation bar and tabs are identical to the previous screenshot. The main area is titled 'Search By Name' and includes fields for 'First Name' and 'Last Name'. Below this are sections for 'or Search By Phone' (with a 'Phone' input field), 'or Search By Email' (with an 'Email' input field), and 'or Search By ID' (with an 'ID' input field). In the top right corner of this search area, a red arrow points to a blue 'Next' button.

Step 3: Click the “Create New” button



The screenshot shows a 'Warning' message box. The message reads: 'No matches were found for the customer information you entered. Would you like to create a new customer using this information or adjust your search?'. At the bottom of the message box are two buttons: 'Create New' (highlighted with a red arrow) and 'Adjust Search'.

Step 4: Fill out the Customer Details and click the “Save” button.

Please note: You must at the very least fill out all the ***** boxes.

AtlasNet Customer Manager
Atlas System for Customer and Workflow Management
Atlas CM v1.23.1.1 Atlas CM Service v1.23.1.2

Customer Job Grid Survey Report Job Stop Report Lead Report Jacquelyn McCulloch (jacmccu) ▾

Currently Viewing ,

Customer Details

First Name *	Customer ID
Last Name *	Company

Current Address

Address 1	
Address 2	
Zip *	Zip
City *	City
State/Prov *	State/Prov
Country	Country
County	County

Destination Address

Address 1	
Address 2	
Zip	Zip
City	City
State/Prov	State/Prov
Country	Country
County	County

Current Contact Information

Primary Phone *	CC	Number	Ext.	Home	Preferred Contact
Secondary Phone	CC	Number	Ext.	Home	<input type="checkbox"/>
Primary Email *					<input type="checkbox"/>
Secondary Email					<input type="checkbox"/>
Do Not Contact	<input type="checkbox"/>				<input type="checkbox"/>

Customer Business

Business ID	Agency Code	Created Date	New Business
There are currently no business records for this customer.			

Save **Close**



Step 5: Once you have saved the Customer Details, a Business ID will be created for the new customer.

Click on the “Business ID” line to open up all the tabs you will need to work the lead.

AtlasNet Customer Manager
Atlas System for Customer and Workflow Management
Atlas CM v1.23.1.1 Atlas CM Service v1.23.1.2

Customer Job Grid Survey Report Job Stop Report Lead Report Jacquelyn McCulloch (jacmccu) ▾

Currently Viewing Test, Jack

Customer Details

First Name * Jack	Customer ID 889785
Last Name * Test	Company Atlas Van Lines

Current Address

Address 1 485 North Service Road Eas
Address 2
Zip * L6H 1A5 <input type="button" value="Search"/>
City * Oakville
State/Prov * ON
Country CAN
County Alberta

Destination Address

Address 1 15 Ridgepoint Way
Address 2
Zip T8A5Y9 <input type="button" value="Search"/>
City Sherwood Park
State/Prov AB
Country CAN
County Alberta

Current Contact Information

Primary Phone * CC (905) 844-0701 Ext. <input type="button" value="Work"/> <input type="checkbox"/>
Secondary Phone CC Number Ext. <input type="button" value="Home"/> <input type="checkbox"/>
Primary Email * jacktest@test.com <input type="checkbox"/>
Secondary Email <input type="checkbox"/>
Do Not Contact <input type="checkbox"/>

Preferred Contact

Customer Business

Business ID 949135	Agency Code	Created Date 4/15/2020
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Viewing Business 949135

Business Details Leads Calendar Survey/Cube Estimates Dispatch Claims Messaging Job Stops

Book. Agent <input type="text"/>	CSR <input type="text"/> <input type="button" value="Search"/>
Orig. Agent <input type="text"/>	Salesperson <input type="text"/> <input type="button" value="Search"/>
Dest. Agent <input type="text"/>	

Source: <input type="text"/>	AAA Code <input type="text"/> Apply AAA <input type="button"/>
Business Line: <input type="button" value="Interstate ▾"/>	Program Code: <input type="text"/>
Partner: <input type="text"/>	PricingID: <input type="text"/>
Status: <input type="text"/> New Customer <input data-bbox="633 1664 670 1691" type="button" value="?"/> <input data-bbox="665 1664 703 1691" type="button" value="i"/>	National Account: <input type="text"/>

Notes

Recent Business History

4/15/2020 8:29 AM Business Record (949135) has been created for Jack Test by Jacquelyn McCulloch from Atlas Customer Manager

4/15/2020 8:29 AM Customer Jack Test (889785) has been created by Jacquelyn McCulloch from Atlas Customer Manager