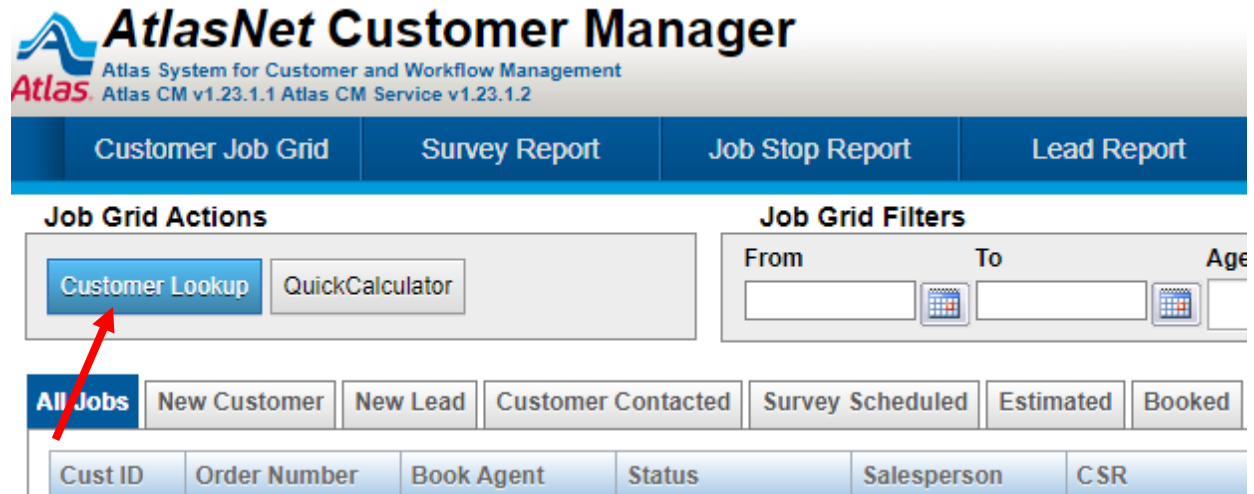


## How to Add a New Customer into ACM

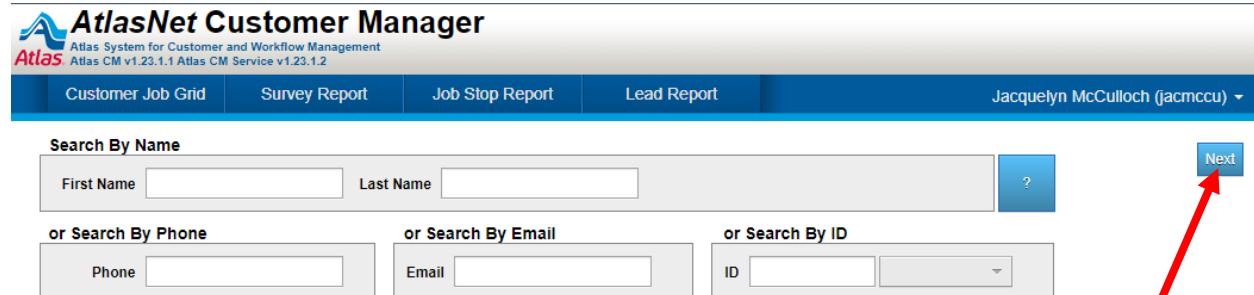
Please use the following instructions to add a new customer into ACM for all 80 series Private Client Business starting April 20<sup>th</sup>, 2020.

**Step 1:** Click the “Customer Lookup” button



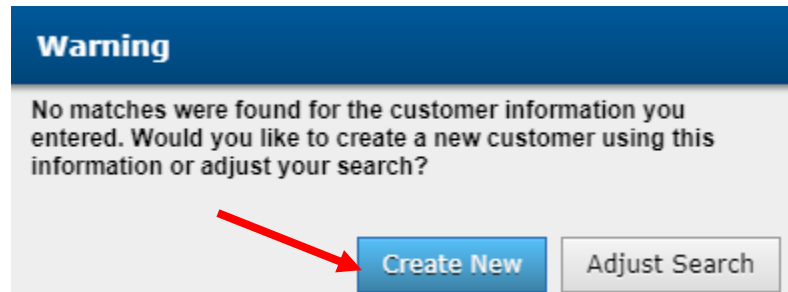
The screenshot shows the AtlasNet Customer Manager interface. The header includes the logo and version information: "AtlasNet Customer Manager", "Atlas System for Customer and Workflow Management", "Atlas CM v1.23.1.1", and "Atlas CM Service v1.23.1.2". Below the header is a navigation bar with four tabs: "Customer Job Grid", "Survey Report", "Job Stop Report", and "Lead Report". The "Customer Job Grid" tab is active. Below the navigation bar are two sections: "Job Grid Actions" and "Job Grid Filters". In the "Job Grid Actions" section, the "Customer Lookup" button is highlighted with a red arrow. The "Job Grid Filters" section contains fields for "From", "To", and "Age". Below these sections is a table with columns: "Cust ID", "Order Number", "Book Agent", "Status", "Salesperson", and "CSR". The table is currently empty.

**Step 2:** Click the “Next” button



The screenshot shows the AtlasNet Customer Manager interface. The header includes the logo and version information: "AtlasNet Customer Manager", "Atlas System for Customer and Workflow Management", "Atlas CM v1.23.1.1", and "Atlas CM Service v1.23.1.2". Below the header is a navigation bar with four tabs: "Customer Job Grid", "Survey Report", "Job Stop Report", and "Lead Report". The "Customer Job Grid" tab is active. Below the navigation bar is a search section. The "Search By Name" section has fields for "First Name" and "Last Name", and a "Next" button highlighted with a red arrow. Below the "Search By Name" section are three sections: "or Search By Phone", "or Search By Email", and "or Search By ID". Each section has a corresponding input field. The "Next" button is also highlighted with a red arrow.

**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?". Below the message are two buttons: "Create New" and "Adjust Search". The "Create New" button is highlighted with a red arrow.

**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 *	<input type="text"/>	Customer ID	<input type="text" value="0"/>
Last Name *	<input type="text"/>	Company	<input type="text" value="Atlas Van Lines"/>

<b>Current Address</b>	<b>Destination Address</b>	<b>Current Contact Information</b>
Address 1 <input type="text"/>	Address 1 <input type="text"/>	Primary Phone * CC <input type="text" value="Number"/> Ext. <input type="text" value="Home"/> Preferred Contact <input type="checkbox"/>
Address 2 <input type="text"/>	Address 2 <input type="text"/>	Secondary Phone CC <input type="text" value="Number"/> Ext. <input type="text" value="Home"/> <input type="checkbox"/>
Zip * <input type="text"/> <input type="button" value="🔍"/>	Zip <input type="text"/> <input type="button" value="🔍"/>	Primary Email * <input type="text"/> <input type="checkbox"/>
City * <input type="text"/>	City <input type="text"/>	Secondary Email <input type="text"/> <input type="checkbox"/>
State/Prov * <input type="text"/>	State/Prov <input type="text"/>	Do Not Contact <input type="checkbox"/>
Country <input type="text"/>	Country <input type="text"/>	<input type="button" value="Send Email"/> <input type="button" value="Add Phones"/> <input type="button" value="Add Emails"/>
County <input type="text"/>	County <input type="text"/>	

**Customer Business**

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

**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

Last Name \* Test

Customer ID 889785

Company Atlas Van Lines

Current Address

Address 1 485 North Service Road East

Address 2

Zip \* L6H 1A5

City Oakville

State/Prov \* ON

Country CAN

County Alberta

Destination Address

Address 1 15 Ridgepoint Way

Address 2

Zip T8A5Y9

City Sherwood Park

State/Prov AB

Country CAN

County Alberta

Current Contact Information

Primary Phone \* CC (905) 844-0701 Ext. Work Preferred Contact

Secondary Phone CC Number Ext. Home

Primary Email \* jacktest@test.com

Secondary Email

Do Not Contact

Send Email Add Phones Add Emails

View Address History Save Close

Customer Business

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

New Business

Viewing Business 949135

Business Details

Leads

Calendar

Survey/Cube

Estimates

Dispatch

Claims

Messaging

Job Stops

Book. Agent

Orig. Agent

Dest. Agent

CSR

Salesperson

Source:

Business Line: Interstate

Partner:

Status: New Customer ?

AAA Code

Program Code:

PricingID:

National Account:

Apply AAA

Internal 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

View All