

How to Cancel Leads In ACM and Cleanup Your Job Grid

Please Note:

- Step 4 is very important to complete the process.
- You must continue to properly cancel unresponsive, bogus, and all duplicate leads in **Lead Manager** as these will affect your booking ratio if not done.
- Cancelling these leads in ACM does not impact your booking ratio but it can be done to clean up your job grid.

Step 1: Open the lead you want to close. Click to open the Business ID information.

Currently Viewing Jack, Jack

Customer Details		Current Address		Destination Address		Current Contact Information	
First Name	Jack	Customer ID	925047	Address 1		Primary Phone	CC (905) 444-3333 Ext. Home
Last Name	Jack	Company	Atlas Van Lines	Address 2		Secondary Phone	CC Number Ext. Home
Address 1		Zip	V1Y	City	Toronto	Primary Email	jmculloch@atlasvanlines.ca
Address 2		Zip	M5G	State/Prov	ON	Secondary Email	
City	Kelowna	City	Toronto	Country	CA	Do Not Contact	<input type="checkbox"/>
State/Prov	BC	State/Prov	ON	County	CA		<input type="checkbox"/>
Country	CA	County	Toronto				<input type="checkbox"/>
County	Central Okanagan						<input type="checkbox"/>

[View Address History](#) [Send Email](#) [Add Phones](#) [Add Emails](#) [Save](#) [Close](#)

Click anywhere on the line to open the Business ID.

Customer Business

Business ID	Agency Code	Created Date	New Business
988675	8780	6/15/2020	

Step 2: On the 'Business Details' tab, click on 'Status' to open your options.

Customer Business

Business ID	Agency Code	Created Date	New Business
988675	8780	6/15/2020	

Viewing Business 988675

[Business Details](#) [Leads](#) [Calendar](#) [Survey/Cube](#) [Estimates](#) [Dispatch](#) [Claims](#) [Messaging](#) [Job Stops](#)

Business Details

Book. Agent	8780	CSR	<input type="text"/>	<input type="button" value=""/>
Orig. Agent	<input type="text"/>	Salesperson	<input type="text"/>	<input type="button" value=""/>
Dest. Agent	<input type="text"/>			
Source:	Atlas Canada Website	AAA Code	<input type="button" value="Apply AAA"/>	
Business Line:	Interstate	Program Code:	<input type="text"/>	
Partner:		PricingID:	<input type="text"/>	
		National Account:	<input type="text"/>	
Status:	New Lead	?		<input type="button" value="Open the status box"/>

Notes

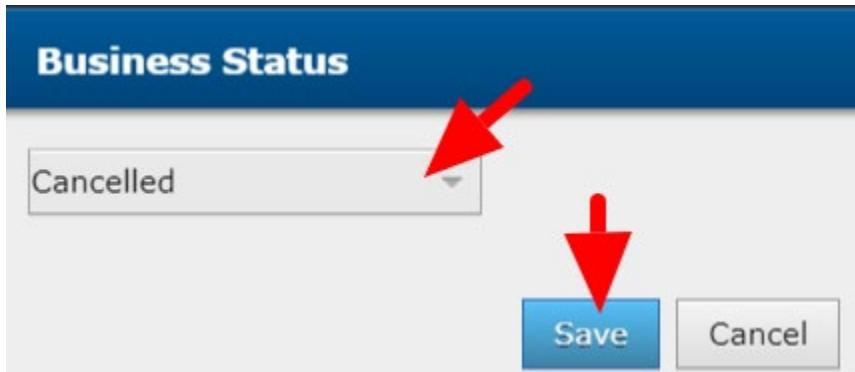
Recent Business History

6/15/2020 10:45 AM
Business status for Business ID: 988675 changed from New Lead to Cancelled by Jacquelyn McCulloch from Atlas Customer Manager

6/15/2020 8:20 AM
Business line for Business ID: 988675 changed from NONE to Interstate by Jacquelyn McCulloch from Atlas Customer Manager

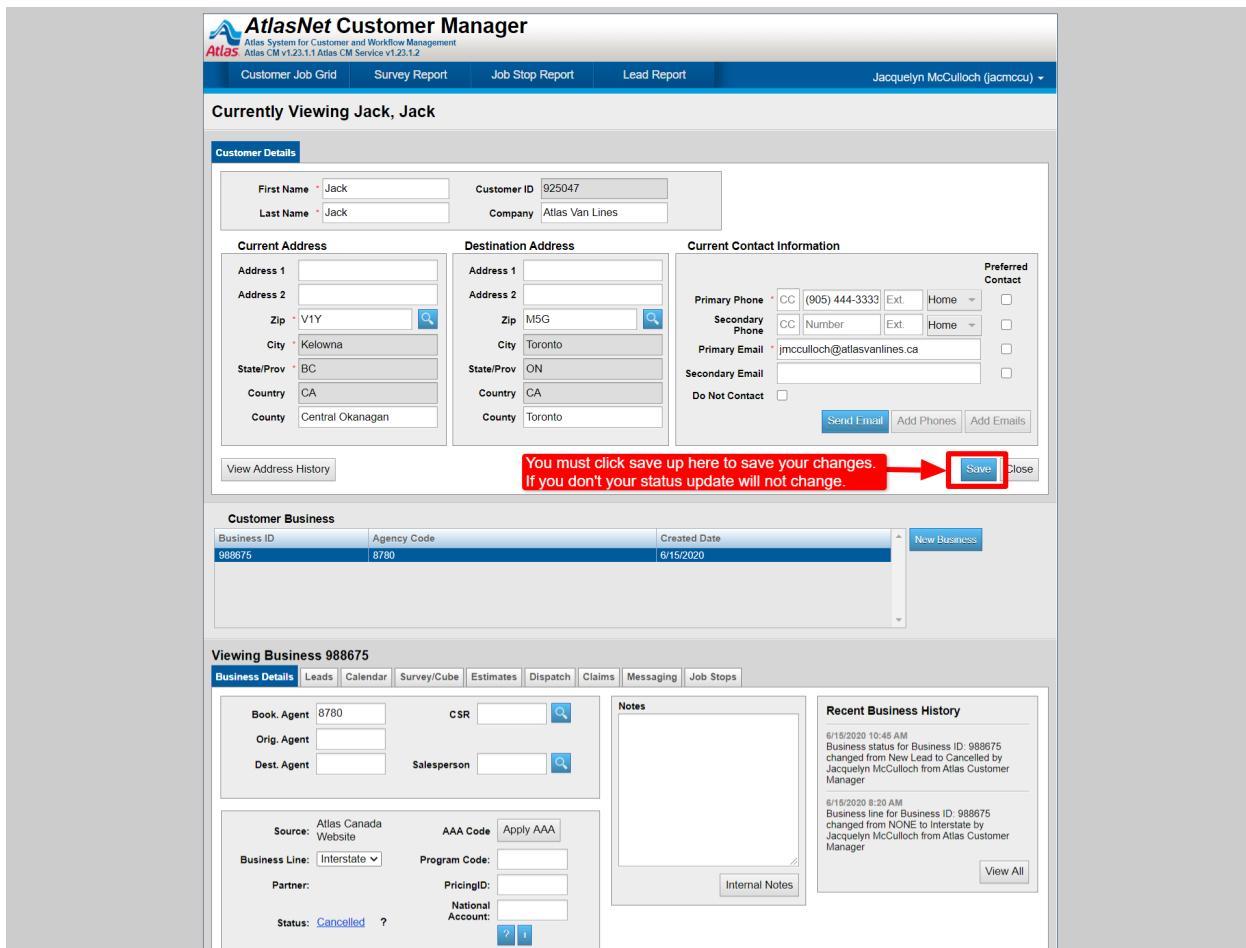
[View All](#)

Step 3: Select the status from the dropdown menu and click 'Save'.



Step 4: You must click 'Save' again below the Customer Details to complete your status change. If you do not save there your change will not be complete.

THIS STEP IS VERY IMPORTANT TO SAVE YOUR NEW STATUS.



You must click save up here to save your changes.
If you don't your status update will not change.

Step 5: Use the tabs to sort your leads by status.

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

Job Grid Actions **Job Grid Filters**

Customer Lookup QuickCalculator

From To Agency Salesperson Grid Limit

8780 b

Apply Clear

All Jobs New Customer New Lead Customer Contacted Survey Scheduled Estimated Booked Lost Cancelled

Use the different tabs to sort your leads.

Cust ID	Order Number	Book Agent	Status	Salesperson	CSR	Name	PU	Del	Co
926573		8780	New Lead			Anand, Mohit	BC	BC	6/
925047		8780	Cancelled			Jack, Jack	BC	ON	6/
924384		8780	New Customer			Knox, Leanne	BC		6/
922932		8780	New Customer			Aitken, Matthew	BC		6/
921833		8780	New Customer			H, Ken	BC		6/
915702		8780	New Customer			McColeman, Katherine	BC		6/
915616		8780	New Customer			Smith, Bryan	BC		6/
914632		8780	New Customer			Mongrain, Kevin	BC		5/
911716		8780	New Customer			Cooper, Tamara	BC		5/
910711		8780	New Customer			Larson, Sarah	BC		5/
909949		8780	New Customer			Burrowes, Cindy	BC		5/
909202		8780	New Customer			Fehr, Roberta	BC		5/
907545		8780	New Customer			Hermann, Laura	BC		6/
907270		8780	Estimated			Lamond, Jim	BC	ON	5/
904038		8780	New Customer			Brown, Gail	BC		5/
903467		8780	New Customer			Millard, Dianne	BC		6/
903308		8780	New Customer			Avalis, Kaylee	BC		5/