

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

First Name *	Jack	Customer ID	925047
Last Name *	Jack	Company	Atlas Van Lines

Current Address	Destination Address	Current Contact Information
Address 1	Address 1	Primary Phone * CC (905) 444-3333 Ext. Home <input type="checkbox"/> Secondary Phone CC Number Ext. Home <input type="checkbox"/> Primary Email * jmcculloch@atlasvanlines.ca <input type="checkbox"/> Secondary Email <input type="checkbox"/> Do Not Contact <input type="checkbox"/> Send Email Add Phones Add Emails
Address 2	Address 2	
Zip * V1Y	Zip M5G	
City * Kelowna	City Toronto	
State/Prov * BC	State/Prov ON	
Country * CA	Country CA	
County Central Okanagan	County Toronto	

[View Address History](#) [Save](#) [Close](#)

Customer Business

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

[New Business](#)

Click anywhere on the line to open the Business ID.

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

Customer Business

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

[New Business](#)

Viewing Business 988675

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

Book. Agent	8780	CSR	
Orig. Agent			
Dest. Agent		Salesperson	

Source: Atlas Canada Website AAA Code Apply AAA

Business Line: Interstate Program Code:

Partner: PricingID:

Status: **New Lead** ?

National Account:

Notes

Recent Business History

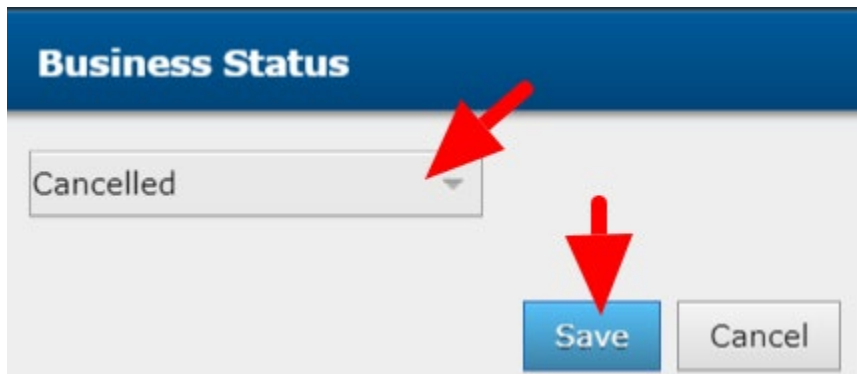
6/15/2020 10:45 AM
Business status for Business ID: 988675 changed from New Lead to Cancelled by Jacquelyn McCulloch from Atlas Customer Manager

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](#)

Open the status box

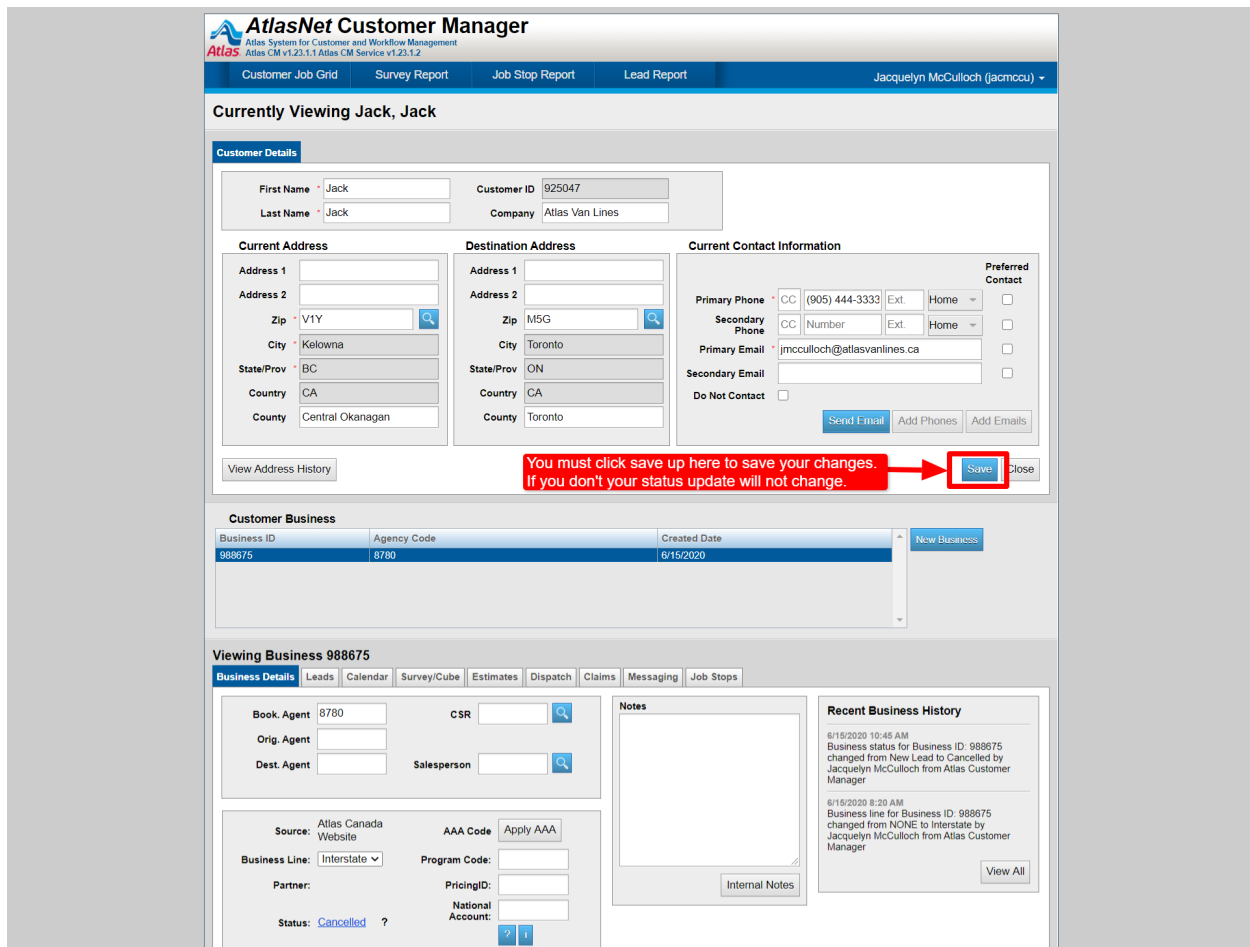
Step 3: Select the status from the dropdown menu and click 'Save'.



A screenshot of a web form titled "Business Status". Below the title is a dropdown menu currently showing "Cancelled". A red arrow points to the dropdown arrow. Below the dropdown are two buttons: "Save" and "Cancel". A red arrow points to the "Save" button.

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.



A screenshot of the AtlasNet Customer Manager interface. The top navigation bar includes "Customer Job Grid", "Survey Report", "Job Stop Report", "Lead Report", and a user profile "Jacquelyn McCulloch (jacmcc)". The main section is titled "Currently Viewing Jack, Jack". Below this is the "Customer Details" section, which contains fields for "First Name" (Jack), "Last Name" (Jack), "Customer ID" (925047), and "Company" (Atlas Van Lines). It also has sections for "Current Address", "Destination Address", and "Current Contact Information". A red text box with an arrow points to the "Save" button in the "Current Contact Information" section, stating: "You must click save up here to save your changes. If you don't your status update will not change." Below the "Customer Details" section is the "Customer Business" section, which shows a table with columns "Business ID", "Agency Code", and "Created Date". The table contains one row with values "988675", "8780", and "6/15/2020". Below this is the "Viewing Business 988675" section, which includes tabs for "Business Details", "Leads", "Calendar", "Survey/Cube", "Estimates", "Dispatch", "Claims", "Messaging", and "Job Stops". The "Business Details" tab is active, showing fields for "Book Agent", "Orig Agent", "Dest Agent", "Salesperson", "Source", "Business Line", "Partner", "Status", "AAA Code", "Program Code", "PricingID", and "National Account". The "Status" field is currently set to "Cancelled". To the right of the "Business Details" section is a "Notes" section and a "Recent Business History" section.

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

Customer Job Grid

Survey Report

Job Stop Report

Lead Report

Jacquelyn McCulloch (jacmccu) ▾

Customer Lookup

QuickCalculator

Job Grid Filters

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	Cc
926573		8780	New Lead			Anand, Mohit	BC		6/1
925047		8780	Cancelled			Jack, Jack	BC	ON	6/1
924384		8780	New Customer			Knox, Leanne	BC		6/1
922932		8780	New Customer			Aitken, Matthew	BC		6/1
921833		8780	New Customer			H, Ken	BC		6/1
915702		8780	New Customer			McColeman, Katherine	BC		6/1
915616		8780	New Customer			Smith, Bryan	BC		6/1
914632		8780	New Customer			Mongrain, Kevin	BC		5/1
911716		8780	New Customer			Cooper, Tamara	BC		5/1
910711		8780	New Customer			Larson, Sarah	BC		5/1
909949		8780	New Customer			Burrowes, Cindy	BC		5/1
909202		8780	New Customer			Fehr, Roberta	BC		5/1
907545		8780	New Customer			Hermann, Laura	BC		6/1
907270		8780	Estimated			Lamond, Jim	BC	ON	5/1
904038		8780	New Customer			Brown, Gail	BC		5/1
903467		8780	New Customer			Millard, Dianne	BC		6/1
903308		8780	New Customer			Avalis, Kaylee	BC		5/1