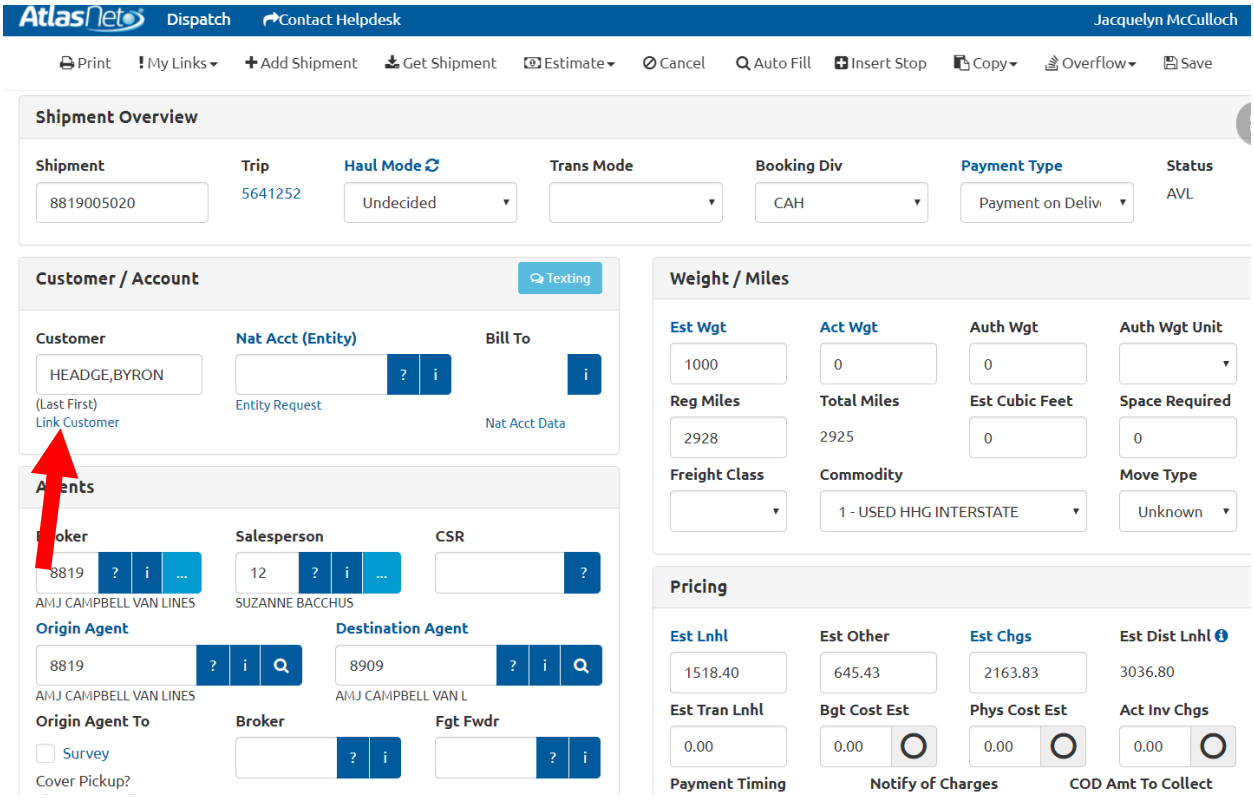
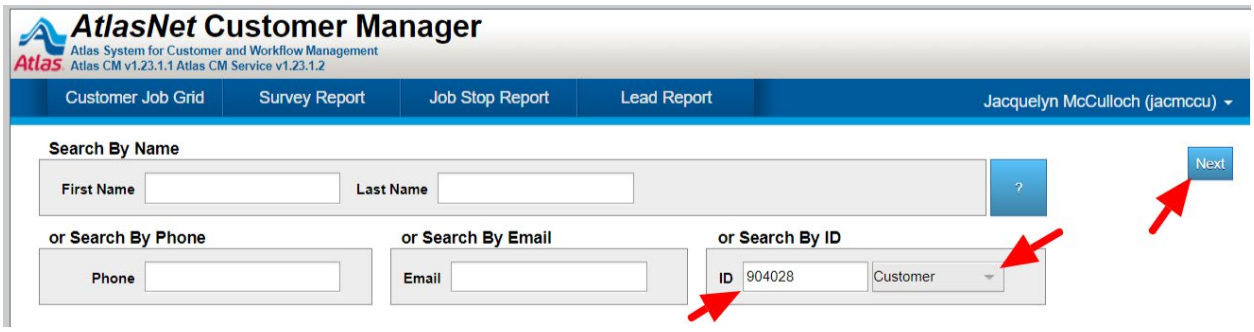
How to Link a Customer (Lead) to the Registration Order

Once a lead is booked in AtlasNet, you can no longer make changes to the estimate. The only way to link the original lead to the registration is through “Edit Shipment”.

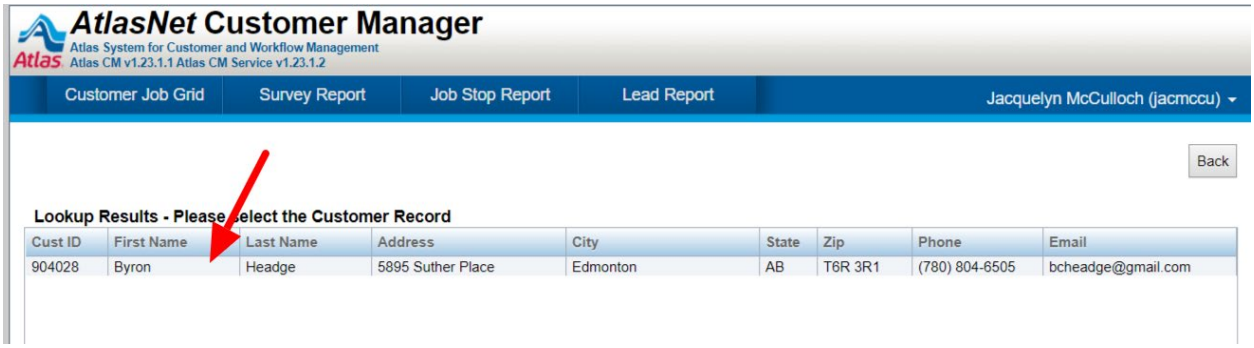
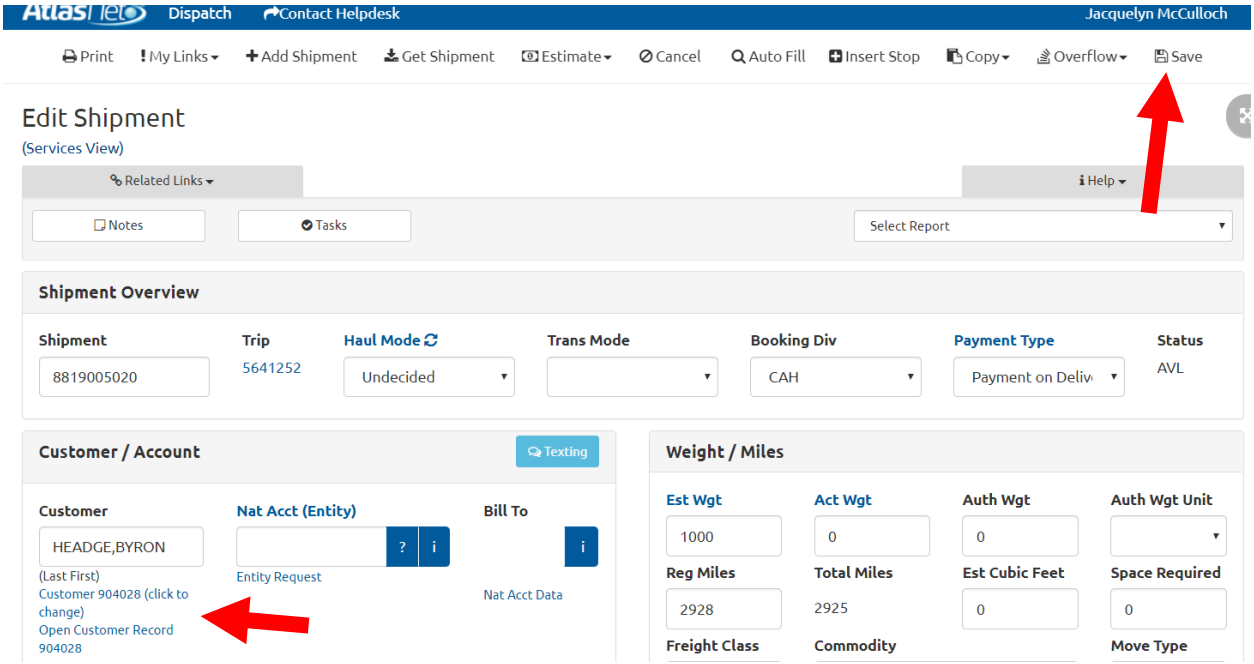
Step 1: Open the registration in “Edit Shipment”. Then click “Link Customer”.



Step 2: Search for the customer by name, phone number, email or ID (making sure to select which ID by selecting the drop down). Then click “Next”.



Step 3: Select the correct lead.



Step 3: Click "Save".