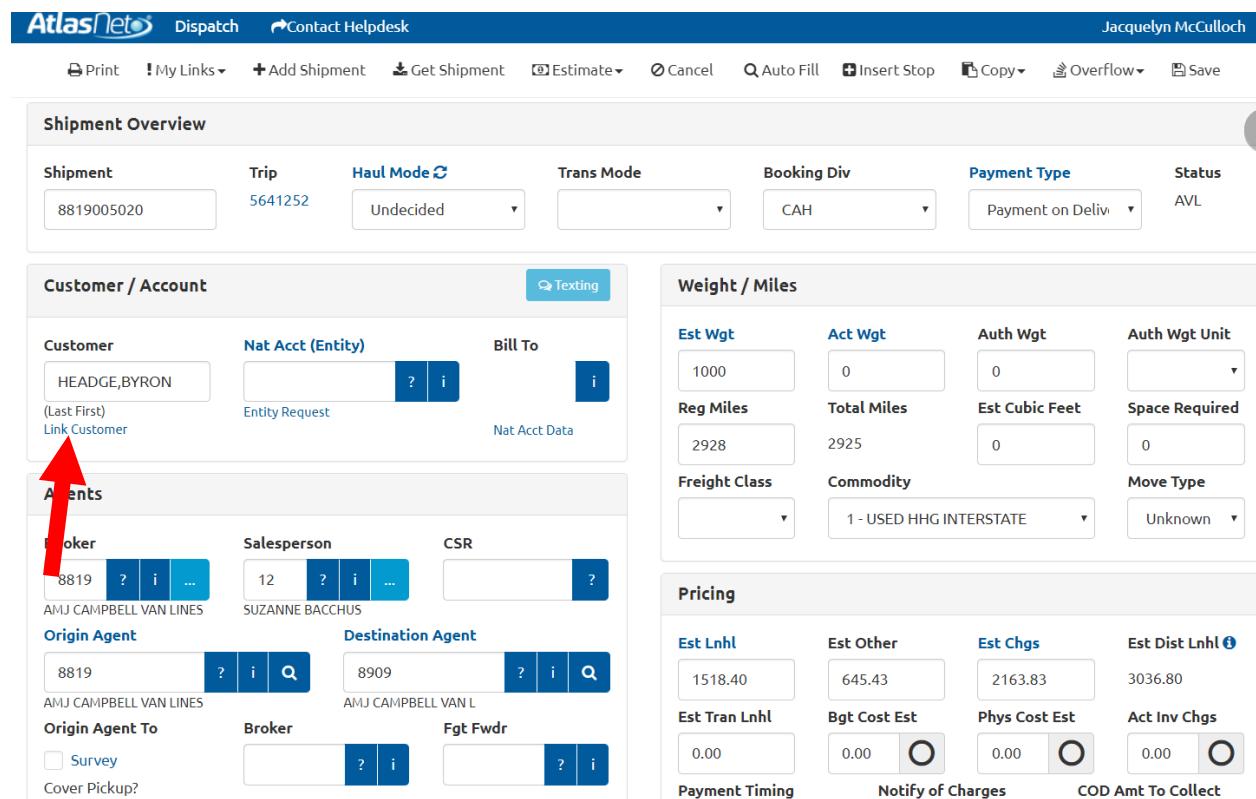


How to Link a Customer (Lead) to the Registration Order

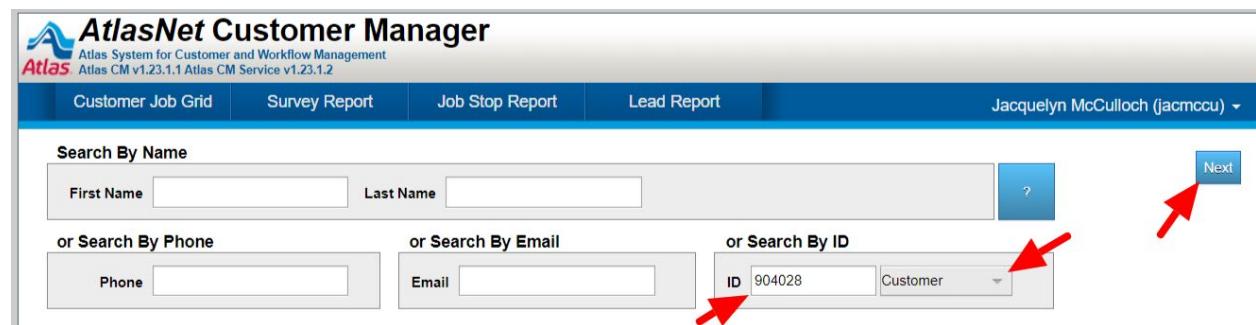
Once a lead is booked in AtlasNet, you can no longer make changes to the estimate. The only way to link the original lead to the registration is through “Edit Shipment”.

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



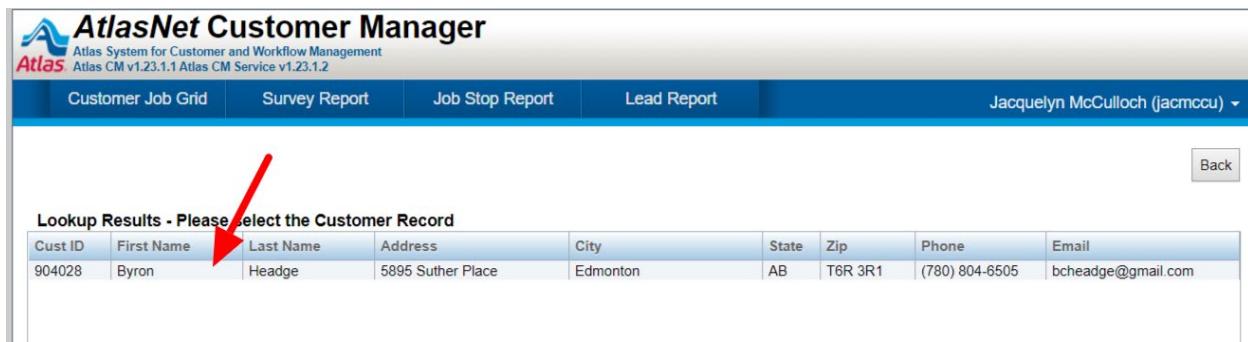
The screenshot shows the AtlasNet Dispatch interface. The top navigation bar includes 'AtlasNet' logo, 'Dispatch', 'Contact Helpdesk', and user 'Jacquelyn McCulloch'. Below the navigation is a toolbar with 'Print', 'My Links', 'Add Shipment', 'Get Shipment', 'Estimate', 'Cancel', 'Auto Fill', 'Insert Stop', 'Copy', 'Overflow', and 'Save' buttons. The main content area is titled 'Shipment Overview'. It contains several sections: 'Shipment' (8819005020, Trip 5641252, Haul Mode Undecided, Trans Mode, Booking Div CAH, Payment Type Payment on Deliv, Status AVL), 'Customer / Account' (Customer HEADGE,BYRON, Nat Acct (Entity) Entity Request, Bill To Nat Acct Data), 'Weight / Miles' (Est Wgt 1000, Act Wgt 0, Auth Wgt 0, Auth Wgt Unit, Reg Miles 2928, Total Miles 2925, Est Cubic Feet 0, Space Required 0), 'Agents' (Broker 8819, Salesperson 12, CSR SUZANNE BACCHUS), 'Pricing' (Est Lnhl 1518.40, Est Other 645.43, Est Chgs 2163.83, Est Dist Lnhl 3036.80, Est Tran Lnhl 0.00, Bgt Cost Est 0.00, Phys Cost Est 0.00, Act Inv Chgs 0.00, Payment Timing, Notify of Charges, COD Amt To Collect). The 'Customer / Account' section has a red arrow pointing to the 'Link Customer' button.

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”.



The screenshot shows the AtlasNet Customer Manager interface. The top navigation bar includes 'AtlasNet Customer Manager', 'Atlas System for Customer and Workflow Management', 'Atlas CM v1.23.1.1', and user 'Jacquelyn McCulloch (jacmccu)'. Below the navigation is a toolbar with 'Customer Job Grid', 'Survey Report', 'Job Stop Report', 'Lead Report', and 'Lead Report' (dropdown). The main content area is titled 'Search By Name'. It features three search fields: 'First Name' and 'Last Name' (with a search icon), 'or Search By Phone' (with a phone icon), 'or Search By Email' (with an email icon), and 'or Search By ID' (with an ID icon). The 'or Search By ID' field contains 'ID 904028' and a dropdown menu set to 'Customer'. A red arrow points to the 'ID' field. Another red arrow points to the 'Customer' dropdown. A third red arrow points to the 'Next' button in the top right corner.

Step 3: Select the correct lead.



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

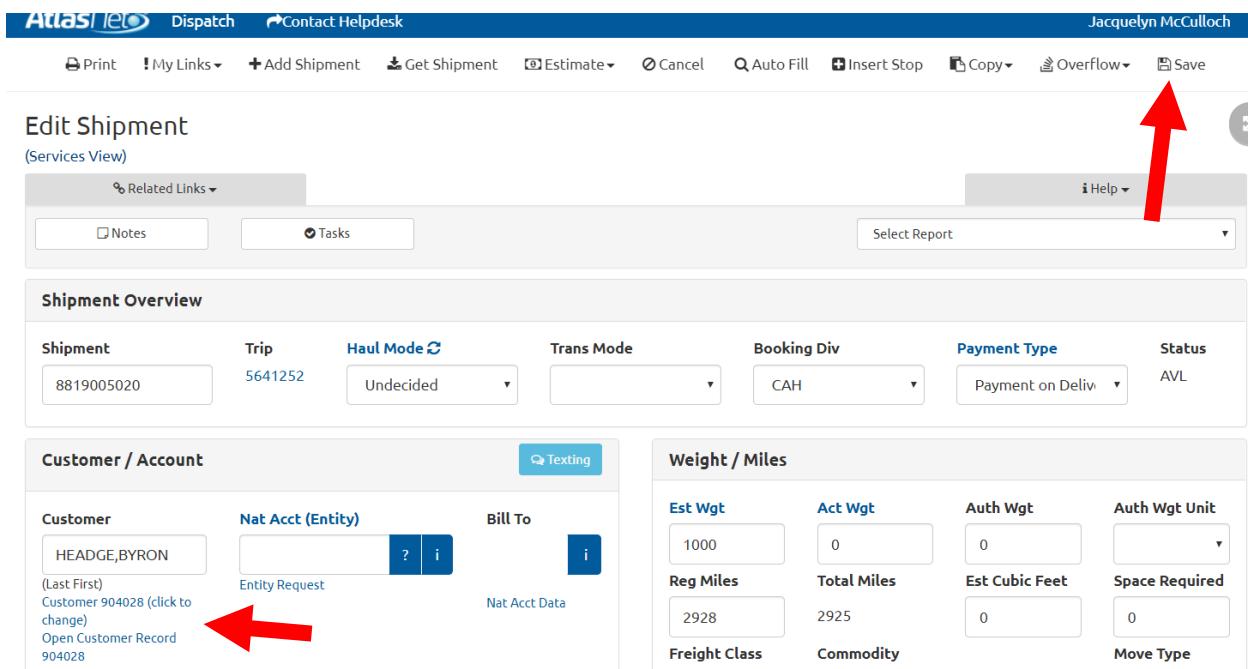
Customer Job Grid Survey Report Job Stop Report Lead Report Jacquelyn McCulloch (jacmccu) ▾

Back

Lookup Results - Please Select the Customer Record

Cust ID	First Name	Last Name	Address	City	State	Zip	Phone	Email
904028	Byron	Headge	5895 Suther Place	Edmonton	AB	T6R 3R1	(780) 804-6505	bcheadge@gmail.com

Step 3: Click "Save".



AtlasNet Dispatch Contact Helpdesk Jacquelyn McCulloch

Print My Links + Add Shipment Get Shipment Estimate Cancel Auto Fill Insert Stop Copy Overflow Save

Edit Shipment (Services View)

Related Links Notes Tasks Select Report Help

Shipment Overview

Shipment	Trip	Haul Mode	Trans Mode	Booking Div	Payment Type	Status
8819005020	5641252	Undecided		CAH	Payment on Deliv	AVL

Customer / Account

Customer	Nat Acct (Entity)	Bill To
HEADGE,BYRON (Last First) Customer 904028 (click to change) Open Customer Record 904028	Entity Request	Nat Acct Data

Weight / Miles

Est Wgt	Act Wgt	Auth Wgt	Auth Wgt Unit
1000	0	0	
Reg Miles	Total Miles	Est Cubic Feet	Space Required
2928	2925	0	0
Freight Class	Commodity	Move Type	