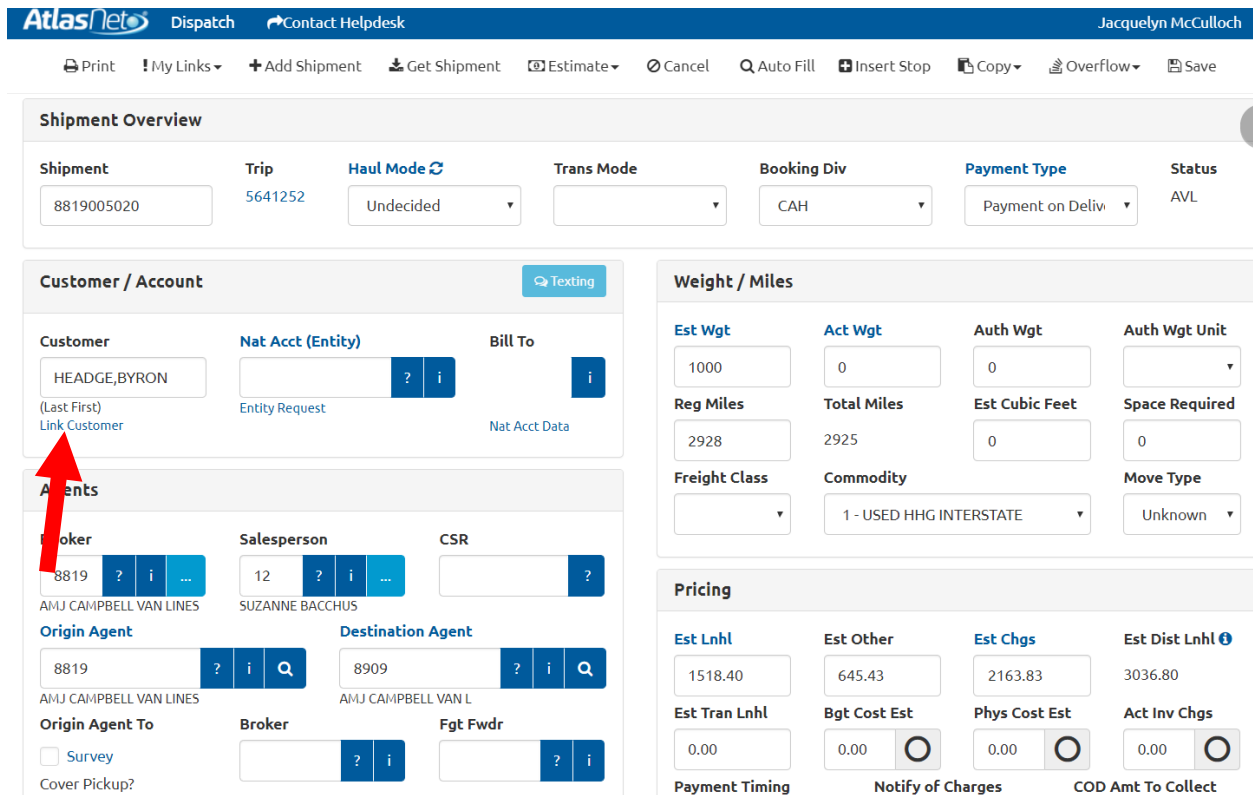


How to Link a Customer (Lead) to the Registration Order

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”.



AtlasNet Dispatch Contact Helpdesk Jacquelyn McCulloch

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

Shipment Overview

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

Customer / Account

Customer: HEADGE,BYRON (Last First) Link Customer

Nat Acct (Entity): Entity Request

Bill To: Nat Acct Data

Agents

Broker: 8819 AMJ CAMPBELL VAN LINES

Salesperson: 12 SUZANNE BACCHUS

CSR: ?

Origin Agent: 8819 AMJ CAMPBELL VAN LINES

Destination Agent: 8909 AMJ CAMPBELL VAN L

Origin Agent To: Survey

Broker: ?

Fgt Fwdr: ?

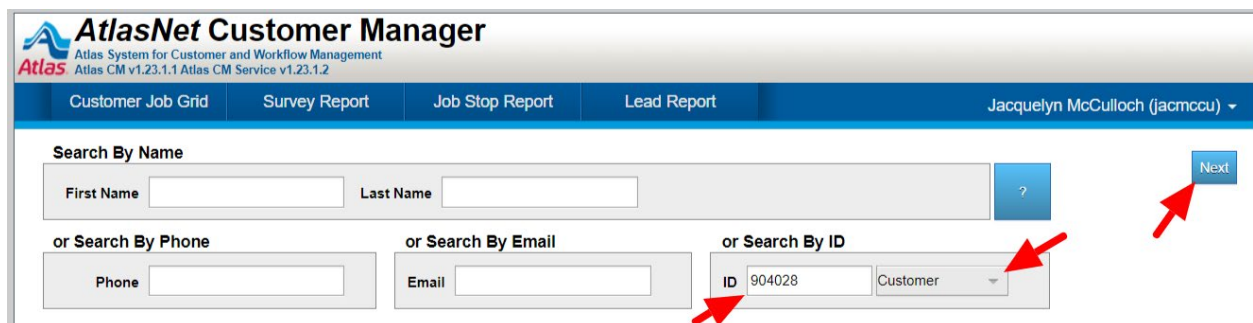
Weight / Miles

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	
	1 - USED HHG INTERSTATE	Unknown	

Pricing

Est Lnhl	Est Other	Est Chgs	Est Dist Lnhl
1518.40	645.43	2163.83	3036.80
Est Tran Lnhl	Bgt Cost Est	Phys Cost Est	Act Inv Chgs
0.00	0.00	0.00	0.00
Payment Timing	Notify of Charges	COD Amt To Collect	

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”.



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)

Search By Name

First Name Last Name ?

or Search By Phone

Phone

or Search By Email

Email

or Search By ID

ID 904028 Customer

Next

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 (jaccmccu) ▾

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".

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

Edit Shipment
(Services View)

Related Links ▾ Help ▾

Notes Tasks Select Report ▾

Shipment Overview

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

Customer / Account Texting

Customer	Nat Acct (Entity)	Bill To
HEADGE,BYRON	<input type="text"/> ? i	<input type="text"/> i
(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
<input type="text" value="1000"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	▾
Reg Miles	Total Miles	Est Cubic Feet	Space Required
<input type="text" value="2928"/>	2925	<input type="text" value="0"/>	<input type="text" value="0"/>
Freight Class	Commodity	Move Type	