

Updating Lead Status for Distribution

Step 1: To update your leads as you progress through the booking process, click on the lead under the 'Customer Business' section. This will then give you access to the variety of tabs to update your lead.

The screenshot shows the 'Customer Business' section with a table listing leads. The first lead has Business ID 1749118, Agency Code 8998, and Created Date 7/25/2024. A 'New Business' button is visible. Below the table, the 'Viewing Business 1749118' section is active, showing various tabs like Business Details, Leads, Calendar, etc. The 'Business Details' tab is selected, displaying fields for Book Agent, Orig Agent, Dest Agent, CSR, Salesperson, Source, Business Line, Tariff, Partner, AAA Code, Program Code, PricingID, and National Account. The status is 'New Lead'. A 'Notes' section and 'Recent Business History' are also visible.

Business ID	Agency Code	Created Date
1749118	8998	7/25/2024

Viewing Business 1749118

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

Book Agent: 8998 | CSR: [] | Orig Agent: [] | Dest Agent: [] | Salesperson: []

Source: Atlas Canada Website | AAA Code: [] | Business Line: NONE | Tariff: NONE | Partner: [] | PricingID: [] | National Account: CN60420010

Status: **New Lead** ?

Notes

Recent Business History

7/25/2024 8:56 AM
Business status for Business ID: 1749118 changed from New Customer to New Lead by Lead Parser from Lead Manager

7/25/2024 8:56 AM
Customer Paige Waugh (1596383) has been created by Lead Parser from Lead Manager

[View All](#)

[Internal Notes](#)

Step 2: In addition, you can promptly update the status of your lead by clicking 'New Lead' under the Business Details tab. This will give you access to a quick status drop down menu (see screenshot below).

The screenshot shows the 'Business Status' dropdown menu. The menu is open, displaying a list of status options: New Customer, New Lead, Customer Contacted, Survey Scheduled, Survey/Estimate, Estimated, Booked, Rated/Billed, Lost, and Cancelled. The 'New Lead' option is highlighted. The background shows the 'Business Details' tab with 'Save' and 'Cancel' buttons.

Business Status

New Customer
New Lead
Customer Contacted
Survey Scheduled
Survey/Estimate
Estimated
Booked
Rated/Billed
Lost
Cancelled

[Save](#) [Cancel](#)

Step 3: Be sure to always click the 'SAVE' button in the top right corner above 'Customer Business' after updating your lead.

View Address History

SaveClose

Customer Business

Business ID	Agency Code	Created Date
1762461	8815	8/27/2024

New Business