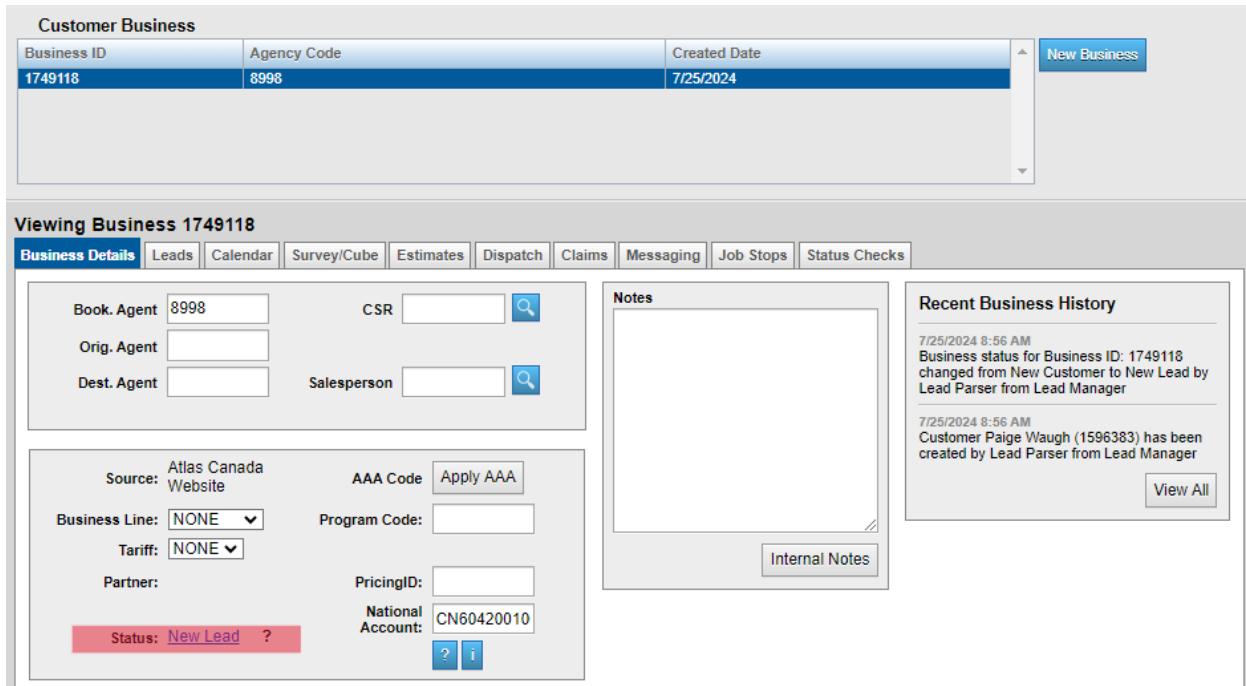


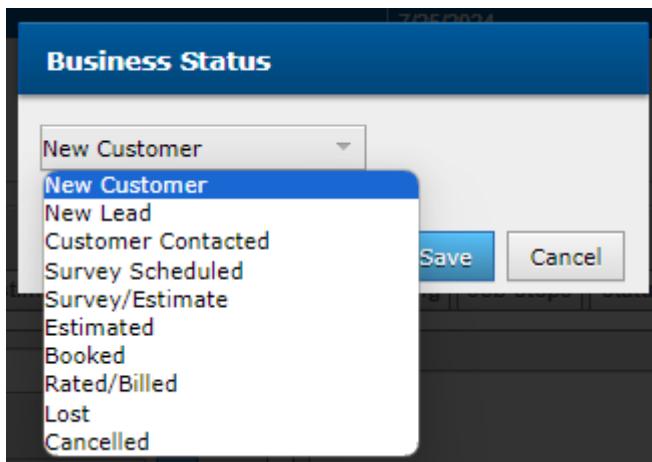
Updating Lead Status for Distribution

Step1: 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.



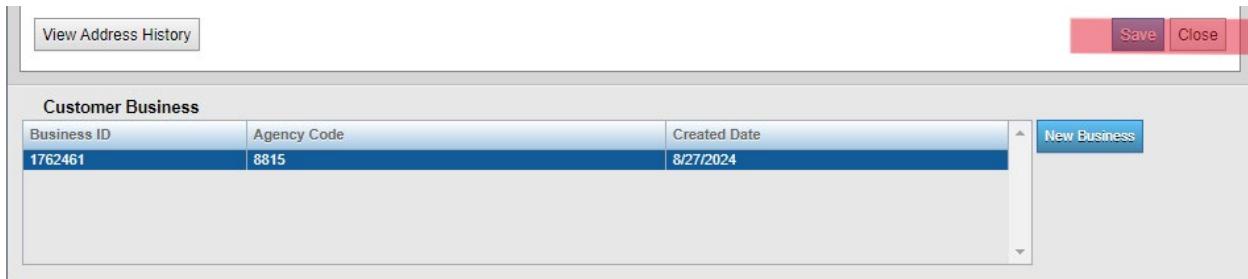
The screenshot shows the 'Customer Business' interface. At the top, there is a table with columns for Business ID (1749118), Agency Code (8998), and Created Date (7/25/2024). A 'New Business' button is located in the top right corner. Below this, the 'Viewing Business 1749118' section is displayed. The 'Business Details' tab is selected, showing various fields: Book. Agent (8998), Orig. Agent, Dest. Agent, CSR, Salesperson, and Notes. There are also sections for Source (Atlas Canada Website), Business Line (NONE), Tariff (NONE), Partner, AAA Code (with an 'Apply AAA' button), Program Code, PricingID, National Account (CN60420010), and a status dropdown currently set to 'New Lead'. To the right, a 'Recent Business History' panel shows two log entries: one from 7/25/2024 at 8:56 AM changing the status to 'New Lead', and another from 7/25/2024 at 8:56 AM creating a customer record for Paige Waugh. A 'View All' button is also present.

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 a 'Business Status' dropdown menu. The 'New Customer' option is selected, showing 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. At the bottom of the menu are 'Save' and 'Cancel' buttons.

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



Customer Business

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

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