



Marianne Sue Ambassador
Nameof Agency

BY STATUS

BY REPRESENTATIVE

Leads to Assign

NEW (2)

Potential Customer Name

Product of Interest

Assign to FR

Reject Lead

Potential Customer Name

Product of Interest

Assign to FR

Reject Lead

NEEDS REASSIGNMENT (1)

Potential Customer Name

Product of Interest

Assign to FR

Reject Lead

▲ PENDING ACCEPTANCE (1)

▲ IN PROGRESS (2)

▲ SOLD (1)

▲ CLOSED (1)

▲ REJECTED (1)

TOTAL LEADS (102)

25%

In progress

25%

Converted

50%

Closed



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Nameof Agency

BY STATUS

BY REPRESENTATIVE

Leads to Assign

NEW (2)

Potential Customer Name

Product of Interest

Assign Lead Now

Cancel

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

Potential Customer Name

Product of Interest

Assign to FR

Reject Lead

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▲ PENDING ACCEPTANCE (1)

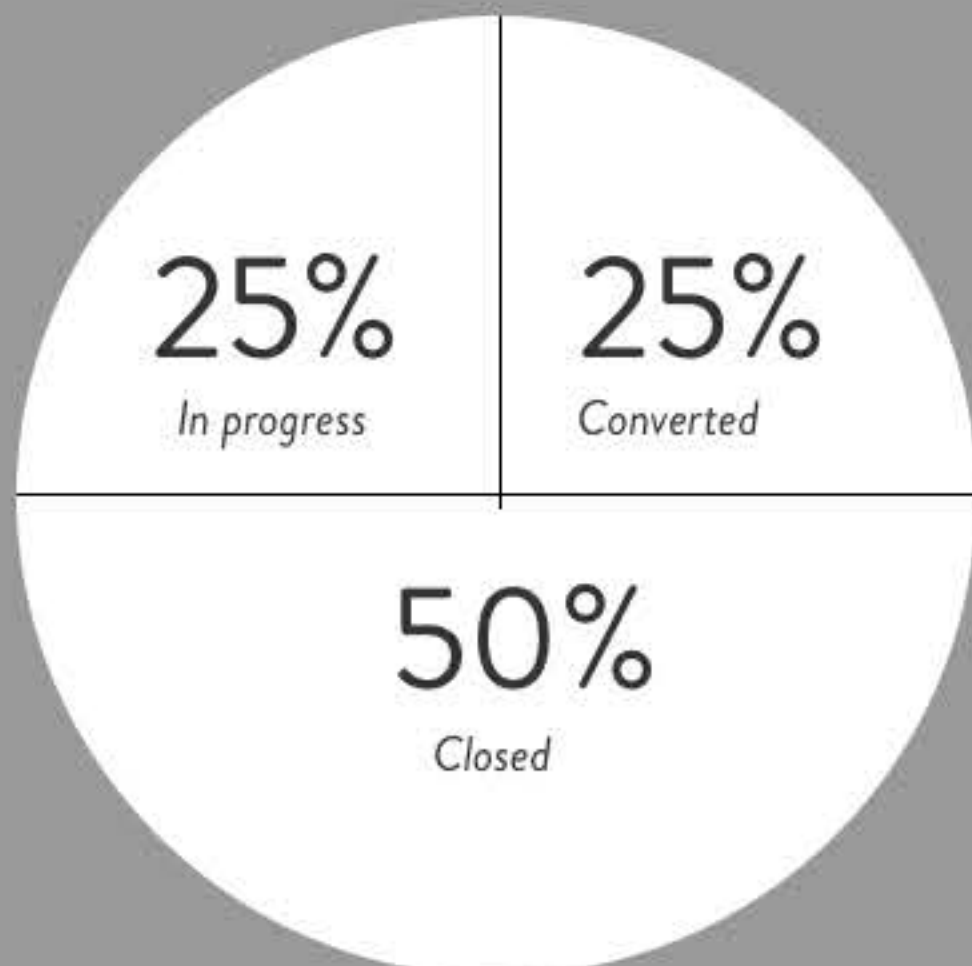
▲ IN PROGRESS (2)

▲ SOLD (1)

▲ CLOSED (1)

▲ REJECTED (1)

TOTAL LEADS (102)





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Just assigned to FR Namegoeshere

Undo Assignment

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Potential Customer Name

Product of Interest

Just assigned to FR Name goes here

Undo Assignment

Potential Customer Name

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Reject Lead

NEEDS REASSIGNMENT (1)

Potential Customer Name

Product of Interest

Assign to FR

Reject Lead

PENDING ACCEPTANCE (1)

FINANCIAL REP NAME HERE

Potential Customer Name

Product of Interest

Assigned to FR Name Here 06/07/2015

Lead Pending

Reassign to FR



Add notes

IN PROGRESS (2)

FINANCIAL REP NAME HERE

Potential Customer Name

Product of Interest

Customer Comments

I am looking for disability insurance for my parents. Can anyone buy this?

Assigned to FR Name Here

06/06/2015

Lead Accepted

06/12/2015

Reassign to FR



Add notes

FINANCIAL REP NAME HERE

Potential Customer Name

Product of Interest

Assigned to FR Name Here

06/06/2015

Lead Accepted

06/12/2015

Reassign to FR



Here is a comment



CONVERTED (1)

FINANCIAL REP NAME HERE

Potential Customer Name

Product of Interest

Assigned to FR Name Here

06/07/2015

Converted

06/14/2015



Add notes

CLOSED (1)

FINANCIAL REP NAME HERE

Potential Customer Name

Product of Interest

Assigned to FR Name Here

06/04/2015

Closed

06/11/2015



Add notes

REJECTED (1)

FINANCIAL REP NAME HERE

Potential Customer Name

Product of Interest

Assigned to FR Name Here

06/04/2015

Lead Rejected

06/09/2015

Reassign to FR



Here is a comment



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Product of Interest

Just assigned to FR Namegoeshere

Undo Assignment

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Reject Lead

NEEDS REASSIGNMENT (1)

Potential Customer Name

Product of Interest

Assign to FR

Reject Lead

PENDING ACCEPTANCE (1)

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here 06/07/2015

Lead Pending

Reassign to FR



Add notes

IN PROGRESS (2)

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Customer Comments

I am looking for disability insurance for my parents. Can anyone buy this?

Assigned to FRName Here

06/06/2015

Lead Accepted

06/12/2015

Reassign to FR



Add notes

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here

06/06/2015

Lead Accepted

06/12/2015



Assign Lead Now

Cancel

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

FR Name Goeshere

Here is a comment

CONVERTED (1)

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here

06/07/2015

Converted

06/14/2015



Add notes

CLOSED (1)

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here

06/04/2015

Closed

06/11/2015



Add notes

REJECTED (1)

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here

06/04/2015

Lead Rejected

06/09/2015

Reassign to FR



Here is a comment

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Converted

50%
Closed



Alberto Financialrepresentative
Name of Agency

Leads to Accept

NEW (2)

Potential Customer Name

Product of Interest

[Accept Lead](#)

[Reject Lead](#)

Potential Customer Name

Product of Interest

[Accept Lead](#)

[Reject Lead](#)

▼ IN PROGRESS (2)

Potential Customer Name

Product of Interest

Customer Comments

I am looking for disability insurance for my parents. Can anyone buy this?

Assigned to FRName Here

06/06/2015

✓ Lead Accepted

06/12/2015



[Reject Lead](#)

Add notes

Potential Customer Name

Product of Interest

Assigned to FRName Here

06/06/2015

✓ Lead Accepted

06/12/2015



[Reject Lead](#)

Here is a comment ✕

CONVERTED (1)

▼ Potential Customer Name

Product of Interest

Assigned to FRName Here

06/07/2015

Converted

06/14/2015



Add notes

CLOSED (1)

▼ Potential Customer Name

Product of Interest

Assigned to FRName Here

06/04/2015

Closed

06/11/2015



Add notes

REJECTED (1)

▼ Potential Customer Name

Product of Interest

Assigned to FRName Here

06/04/2015

✗ Lead Rejected

06/09/2015

[Reassign to FR](#)



Here is a comment ✕

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