



Agency Ambassador
Name of Agency

Last updated
06/15/2015

Avatar/initials in circle

BY REPRESENTATIVE | BY STATUS

Can filter to see by rep or status

NEW (2)

Potential Customer Name
Product of Interest

Assign Lead

Reject Lead

Can accept or reject

Potential Customer Name
Product of Interest

Assign Lead

Reject Lead

In Progress accordion open on launch; all other accordions would be closed

▼ IN PROGRESS (3)

All Accepted Pending Rejected

FINANCIAL REP NAMEHERE

Potential Customer Name
Product of Interest

Assigned to FRName Here 06/07/2015

✓ Lead Accepted 06/07/2015

Reassign Lead



In Progress can be filtered

FINANCIAL REP NAMEHERE

Potential Customer Name
Product of Interest

Assigned to FRName Here 06/06/2015

⊖ Lead Pending

Reassign Lead



Status shown by icon also (far left)

Can reassign, launch email, launch the phone and open a note field (on left slightly down)

FINANCIAL REP NAMEHERE

Potential Customer Name
Product of Interest

Assigned to FRName Here 06/04/2015

✗ Lead Rejected 06/09/2015

Reassign Lead



Not accepting new customers

▼ CONVERTED (2)

FINANCIAL REP NAMEHERE

Potential Customer Name
Product of Interest

Assigned to FRName Here 06/07/2015

Converted 06/14/2015



FINANCIAL REP NAMEHERE

Potential Customer Name
Product of Interest

Assigned to FRName Here 06/04/2015

Converted 06/11/2015



▲ CLOSED (83)

▲ REJECTED (7)

TOTAL LEADS (102)

