WEEK 2

QUICKSTART GUIDE

Creating Moves, Staying Organized, & Tracking Progress

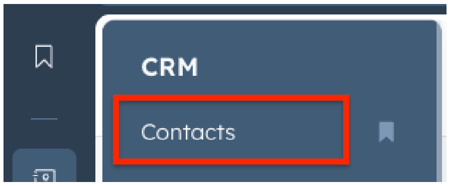
Creating a Move Record Manually

Use this process for any move that doesn't originate from the Atlas Van Lines Canada website, such as leads from your website, referrals, or marketing campaigns.

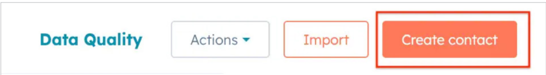
STEP 1 - START WITH THE CONTACT

All moves in HubSpot begin with a contact.

1) Navigate to Contacts in HubSpot.



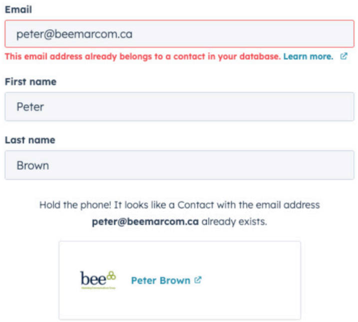
2) Click Create Contact in the top right corner.



3) Begin typing the first name, last name, or email of the customer.

HubSpot will:

- Show an existing contact if they've moved with Atlas before (even with a different agent).
- Prompt you to create a new contact if no match is found.



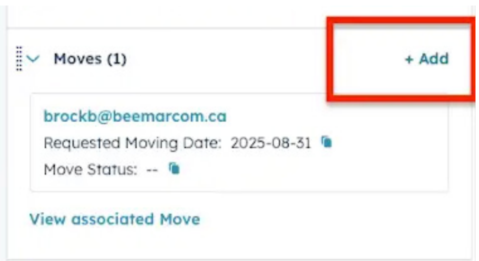
- Fill in all fields and select **Save**.

NOTE:
- You can see all contacts in **HubSpot.**
- You will only see your **own move records (deals)** linked to those contacts.

STEP 2 - CREATE A MOVE RECORD

Once the contact is created or selected, you will be directed to that contact's page:

1) Find the Moves section on the right-hand panel, click Add.



2) Enter the following information:

- Email
- Move Origin and Destination
- Move Date
- Move Size
- Requested Moving Date
- Booking Agent Code
- Click Create to save the move record.
- A single contact may have **multiple move records**—each one representing a unique move.

STEP 3 - MANAGE THE MOVE

Once the move record is set up, you can:

- Add **tasks, notes, and documents**
- Track **surveys, estimates, and communications**
- Move the deal through stages from lead to completion

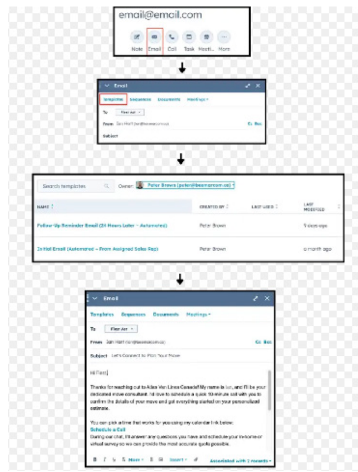
STEP 4 - SAVE TIME WITH TEMPLATES & LOGGING TOOLS

Stay efficient while keeping a complete record of client communication.

In the **Lead or Move Record:**

1) Click Email, then select Templates to insert a prewritten message.

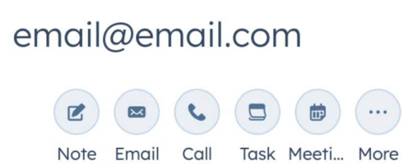
2) Personalize and send, or schedule the email for later.



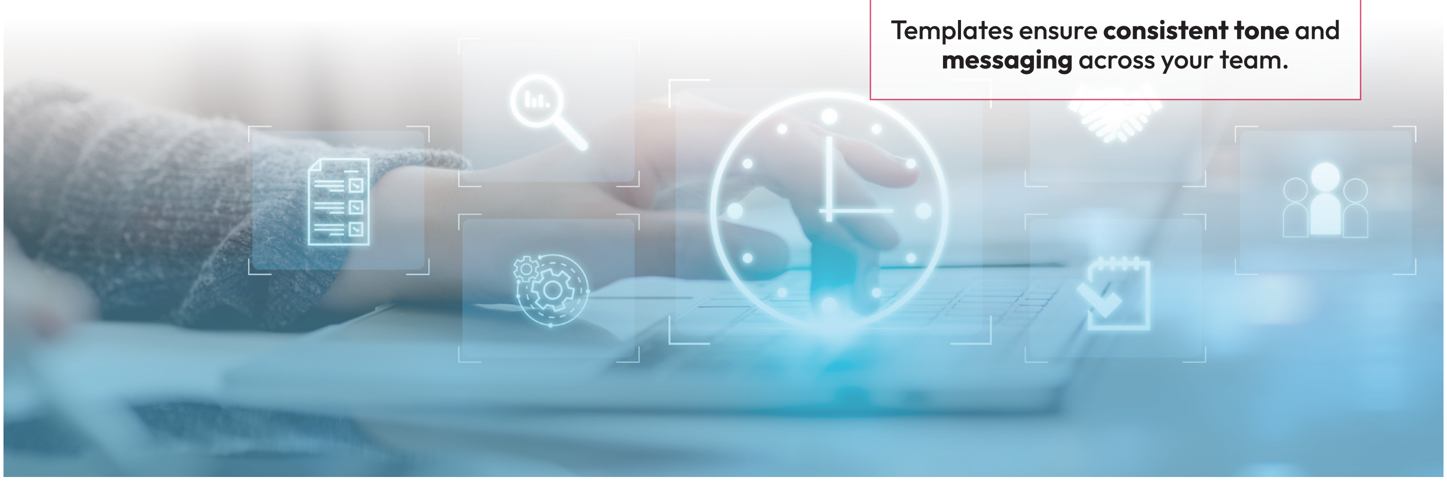
Use the left-hand panel to log:

- Calls
- Meetings
- Notes
- Tasks

All logged activity is visible on the contact timeline for easy tracking.



Templates ensure **consistent tone** and **messaging** across your team.

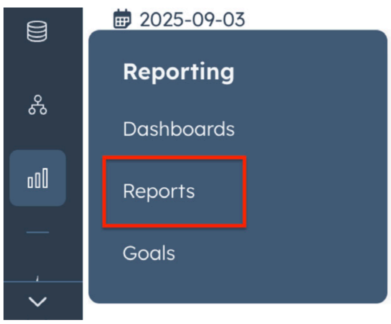


STEP 5 - STAY ACCOUNTABLE WITH DASHBOARDS

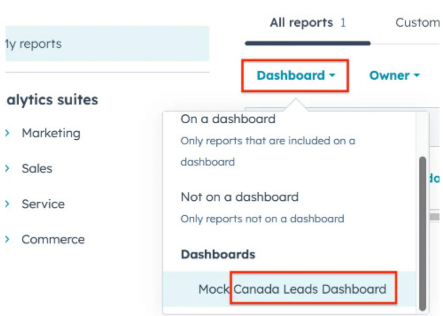
Dashboards help you track performance and identify follow-up needs.

Steps:

1) Go to **Reports > Dashboards**

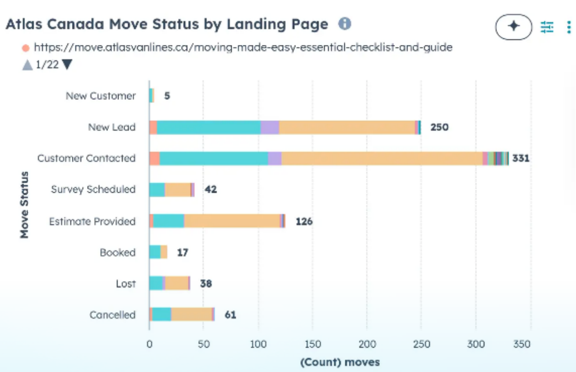


2) Open the **Atlas Sales Dashboard**
(or your assigned view)

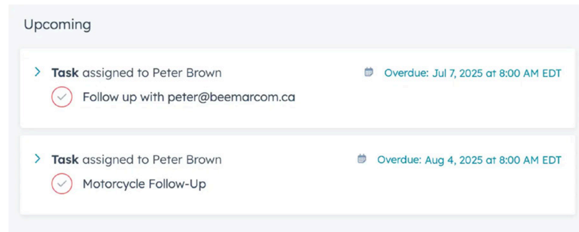


Review key metrics:

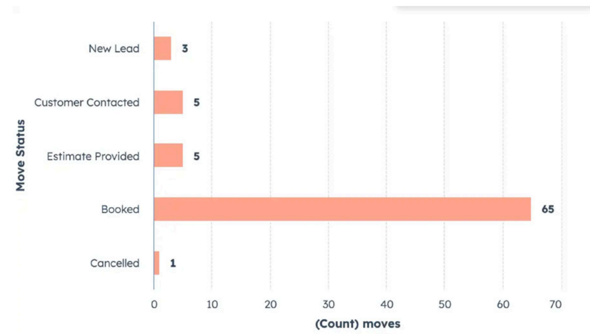
- Leads by Stage



- Tasks Due



- Activity by Agent
- Closed Won/Lost



Use filters to adjust by:

- Date Range
- Agent
- Move Stage

Check your dashboard daily to stay focused.

Use your data to prioritize outreach and identify next steps.

Need Help?

Atlas HubSpot Support Contact:
hubspotsupport@atlasvanlines.ca