JNarPro Industries

TECHNOLOGY / STRATEGY / OPERATIONS



PARTNER TRACKER

YOUR QUICK-START GUIDE

01 FIND YOUR LEAD
Open your tracker. Find the person.

02 ADD YOUR NOTES
Write call results in the first notes column.

03 CHOOSE A STATUS
Choose the status that matches the result.

04 UPDATE CODING
Check Coded when complete. Select the carriers.

EXAMPLE ONLY

Partner Notes	Status	Coded	Carrier
Interested. Follow up Friday.	Pending ▾	☐	Select carrier ▾

A NOTE IS REQUIRED

Denied • Do Not Contact • Terminated • Left

Write the reason in **column A first.** Then select the status.

No note? The tracker restores the previous status and selects the notes cell.

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STATUS & TIMING

KNOW WHAT TO CHOOSE

STATUS	DESCRIPTION
Pending	Awaiting an update
Agent	Joined as an individual agent
Team	Joined as a team or sub-agent
Already with us	Already with your company before our referral
No Answer	Tried to reach them; no response
Denied *	Declined or not moving forward
Do Not Contact *	Stop outreach; record why
Terminated *	Your company ended the relationship
Left *	They chose to leave voluntarily

* A reason is required in column A.

TIMING REQUIREMENTS

5 BUSINESS DAYS

Report **Already with us** within 5 business days of Date Added.

10 BUSINESS DAYS

Uncoded leads still **blank** or **Pending** receive a warning.

+2 BUSINESS DAYS

After the warning, update within 2 business days or the lead goes to **private review.**

Weekdays only. Pacific time. Date Added never resets.

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