

How to reassign customers, manufacturers or sales reps individually?

Example

Reassign all customers located in a state or zip code to a new sales rep.

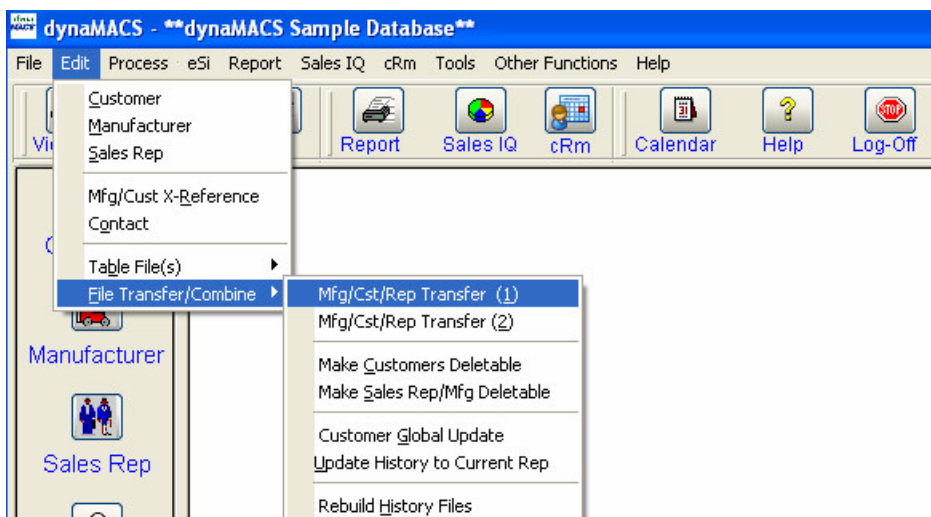
Module

Basic system >Edit>File Transfer Combine>File Transfer Combine 1

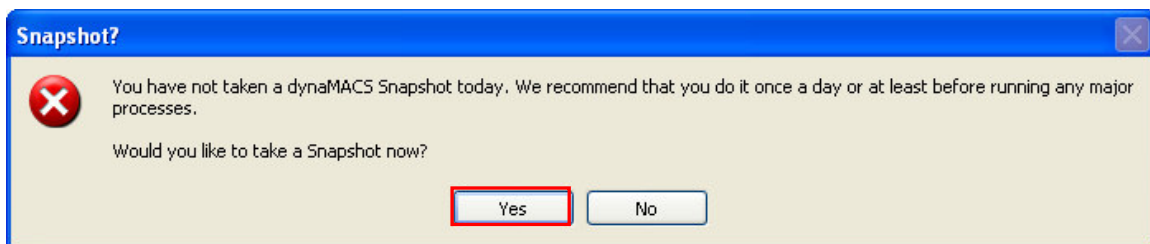
Solution

Follow the instructions below:

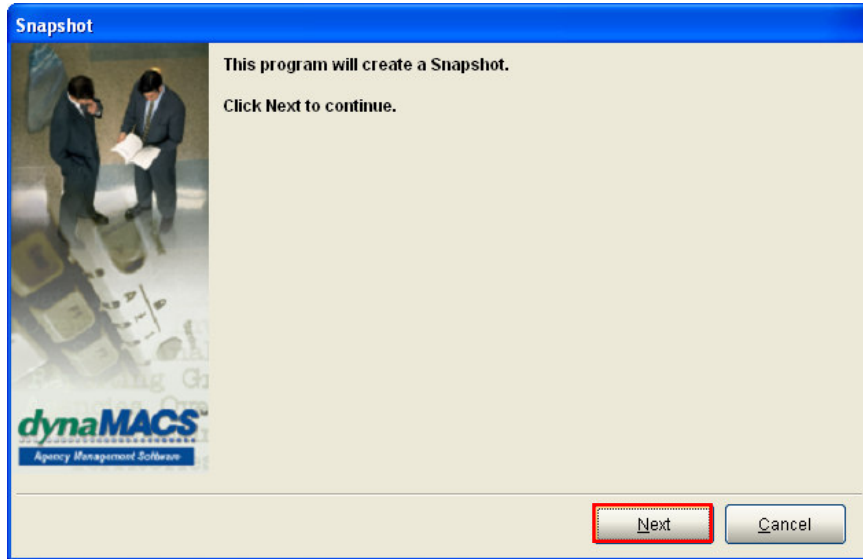
1. Select menu Edit>File Transfer/Combine> Mfg/Cst/Rep Transfer (1)



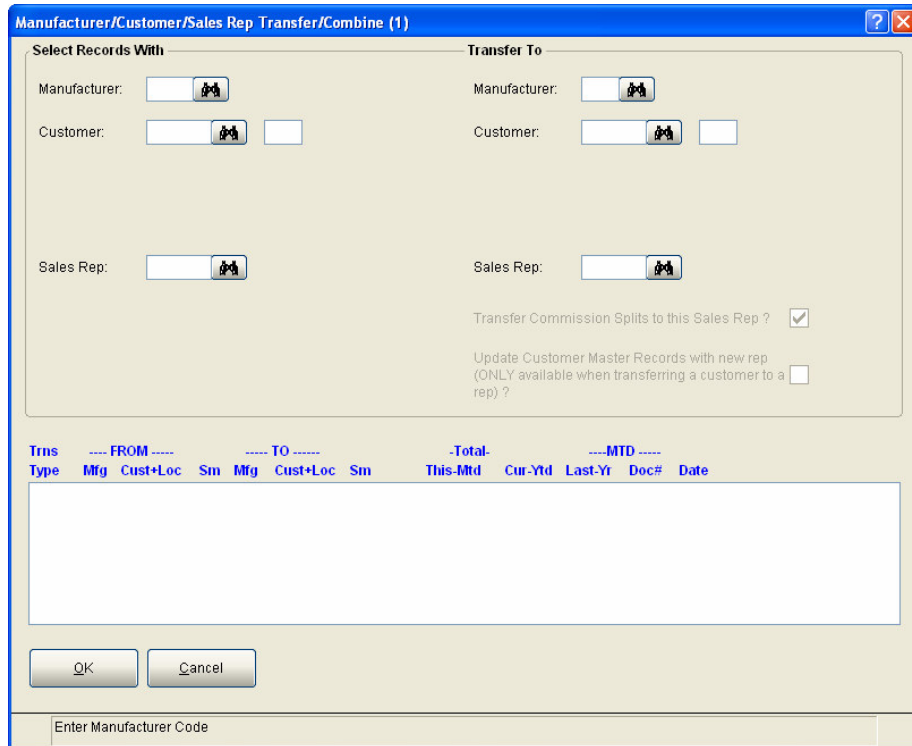
2. The Snapshot dialog box will appear, choose **YES**.



3. Select Next.



4. Wait for it to process (This will take several minutes).
5. The Manufacturer/Customer/Sales Rep Transfer/Combine (1) window will display.



Here are some example screen shots of different scenarios:

Select Records With	Transfer To
Manufacturer: <input type="text"/> Customer: A&GM00 <input type="text"/> A&G Metals Company 676 Jefferson Cleveland 44100 Sales Rep: <input type="text"/> Assign: TG	Manufacturer: <input type="text"/> Customer: ACEF00 <input type="text"/> Ace Fabricating Company 2018 Holiday Drive Suite Number 108A Columbus 46200 Sales Rep: <input type="text"/> Assign: RW Transfer Commission Splits to this Sales Rep ? <input checked="" type="checkbox"/> Update Customer Master Records with new rep (ONLY available when transferring a customer to a rep) ? <input type="checkbox"/>

This is when one customer has merged with another customer.

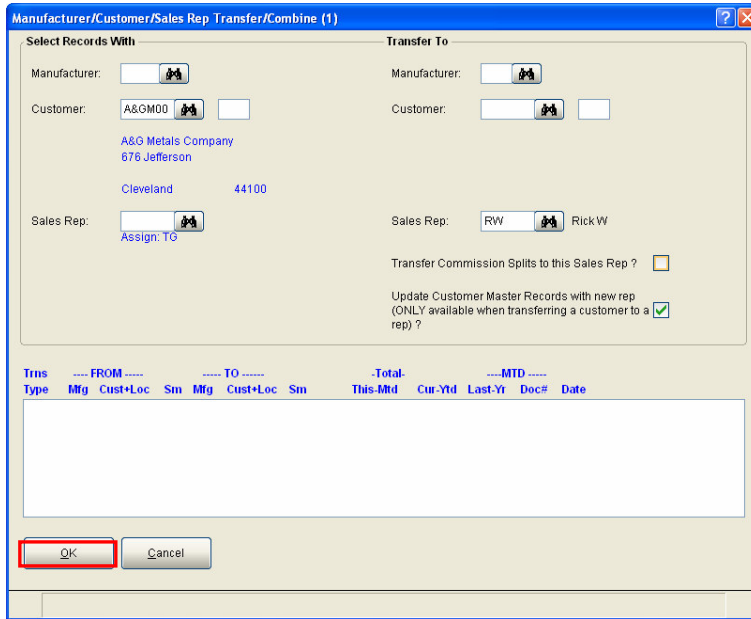
Select Records With	Transfer To
Manufacturer: <input type="text"/> Customer: A&GM00 <input type="text"/> A&G Metals Company 676 Jefferson Cleveland 44100 Sales Rep: <input type="text"/> Assign: TG	Manufacturer: <input type="text"/> Customer: <input type="text"/> <input type="text"/> Sales Rep: RW Rick W Transfer Commission Splits to this Sales Rep ? <input type="checkbox"/> Update Customer Master Records with new rep (ONLY available when transferring a customer to a rep) ? <input checked="" type="checkbox"/>

This is when a customer is reassigned to another sales rep and you want the Customer Maintenance screen to be updated to the current sales rep.

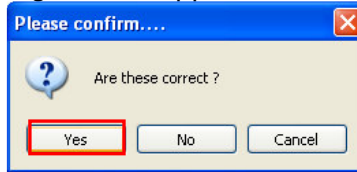
Select Records With	Transfer To
Manufacturer: MNC MNC Company Customer: <input type="text"/> <input type="text"/> Sales Rep: <input type="text"/>	Manufacturer: HFK H. F. Krause Customer: <input type="text"/> <input type="text"/> Sales Rep: <input type="text"/> Transfer Commission Splits to this Sales Rep ? <input checked="" type="checkbox"/> Update Customer Master Records with new rep (ONLY available when transferring a customer to a rep) ? <input type="checkbox"/>

This is when a manufacturer is bought out by another manufacturer.

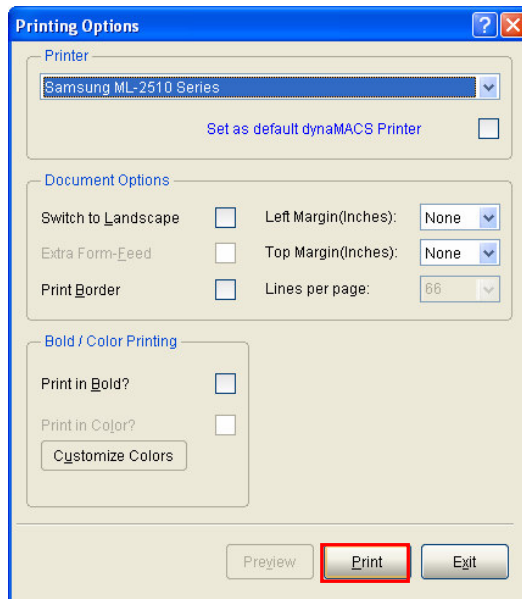
6. When finished with your selections, choose **OK**.



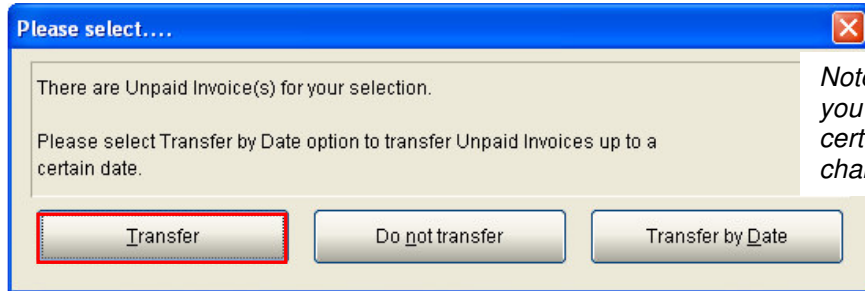
7. The Please confirm dialog box will appear, select **YES**.



8. The Print Options window will display, choose **PRINT** to print out the report for your audit records.

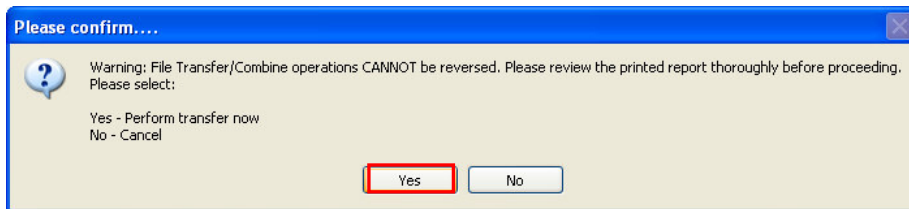


9. If you receive the following window, most of the time you will select **TRANSFER**.

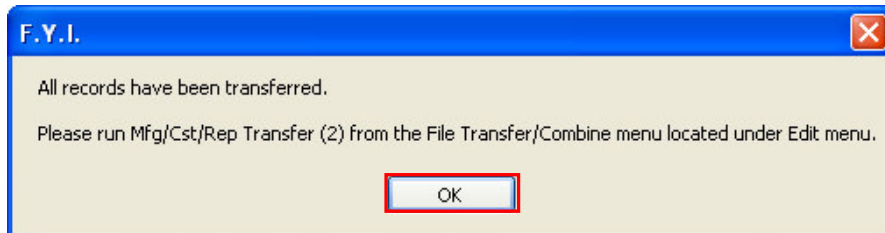


Note: Transfer by Date is if you want the invoices after a certain date to have the change.

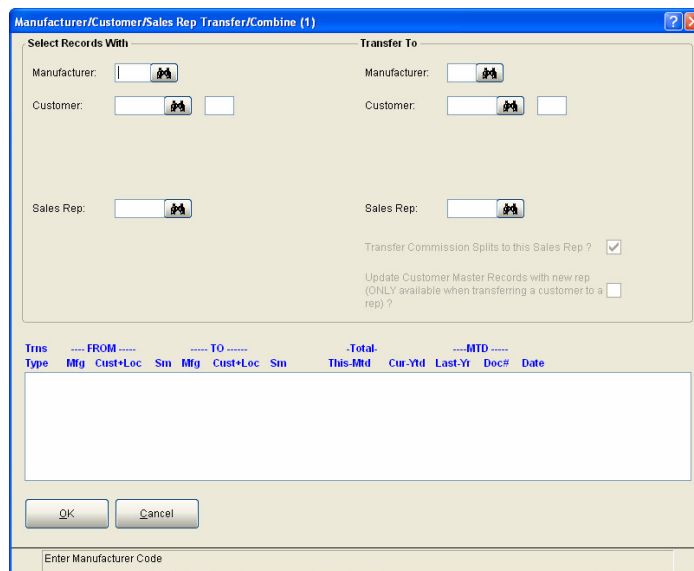
10. Choose **YES** at the please confirm screen.



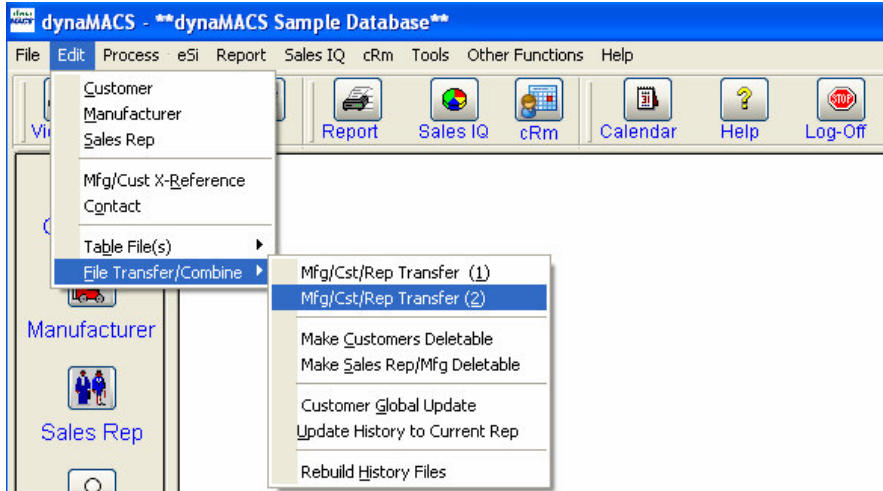
11. Select **OK** at the FYI window.



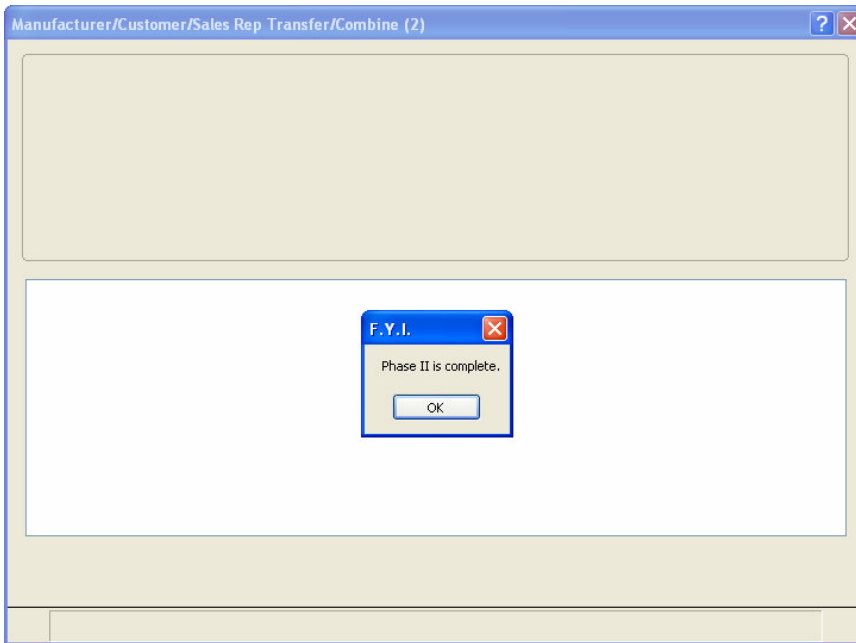
12. Finish entering all the transfers, then go to the next step.



13. Select menu Edit>File Transfer/Combine> Mfg/Cst/Rep Transfer (2).



14. The following screen with appear, choose **OK**.



15. When finished, you will be at the main dynaMACS screen.