

How to reassign multiple customers for one sales rep to another sales rep without changing each customer individually?

Example

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

Requirements

Related FAQs: ET-103

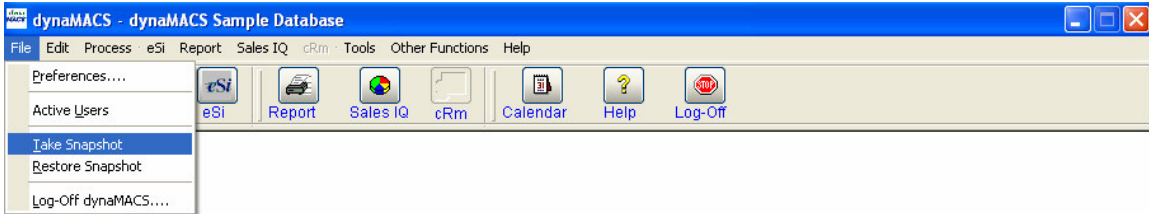
Module

Basic system >Edit>File Transfer Combine>Customer Global Update

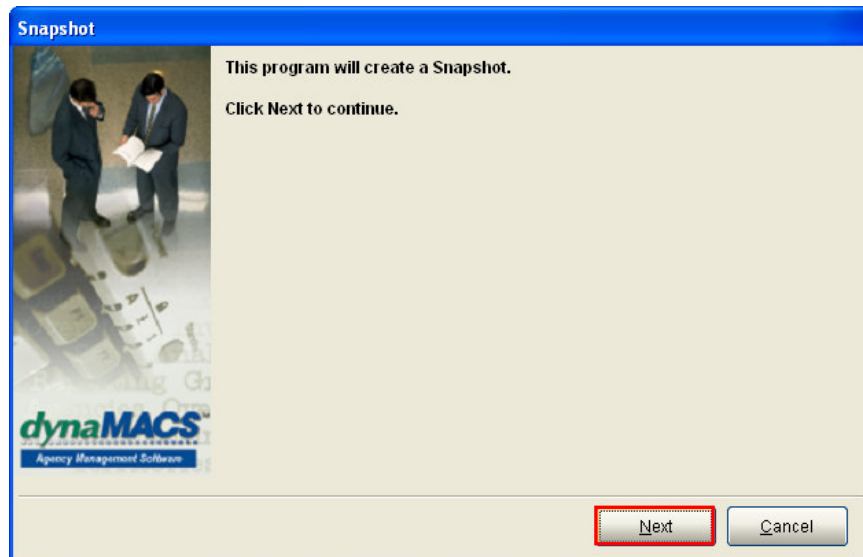
Solution

Follow the instructions below:

1. Take a Snapshot from the File menu.

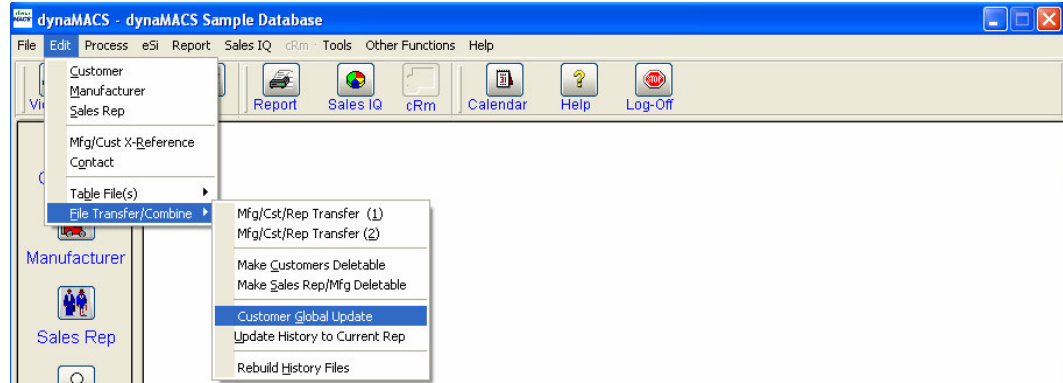


2. Select Next.

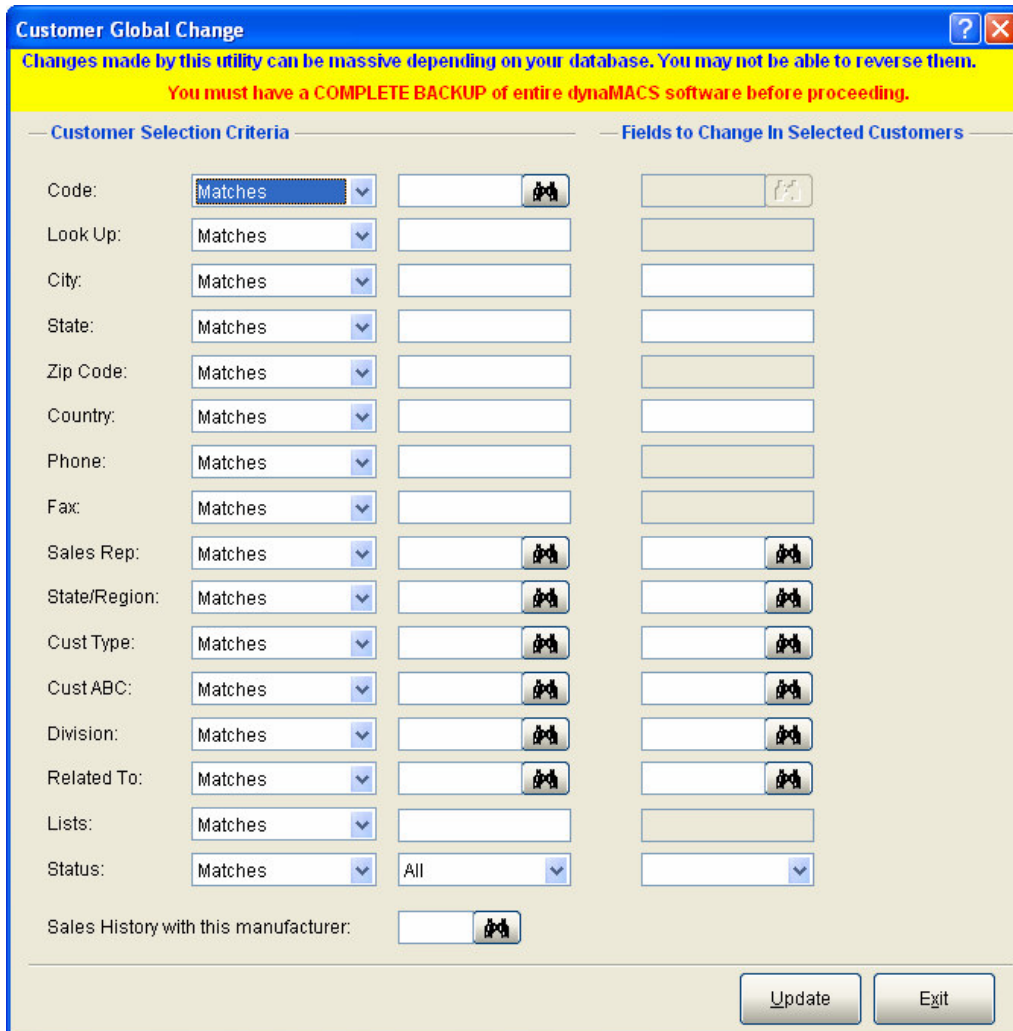


3. Wait for it to process (This will take several minutes).

- Select menu Edit>File Transfer/Combine>Customer Global Update.



- The following screen will appear:



Here are some example screen shots of different scenarios:

Customer Selection Criteria		Fields to Change In Selected Customers	
Code:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Look Up:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
City:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
State:	Matches <input type="text" value="OH"/>	<input type="text"/>	<input type="text"/>
Zip Code:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Country:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Phone:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Fax:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Rep:	Matches <input type="text" value="JB"/>	<input type="text" value="RW"/>	<input type="text"/>

This will move all of JB's customers that are located in Ohio to RW.

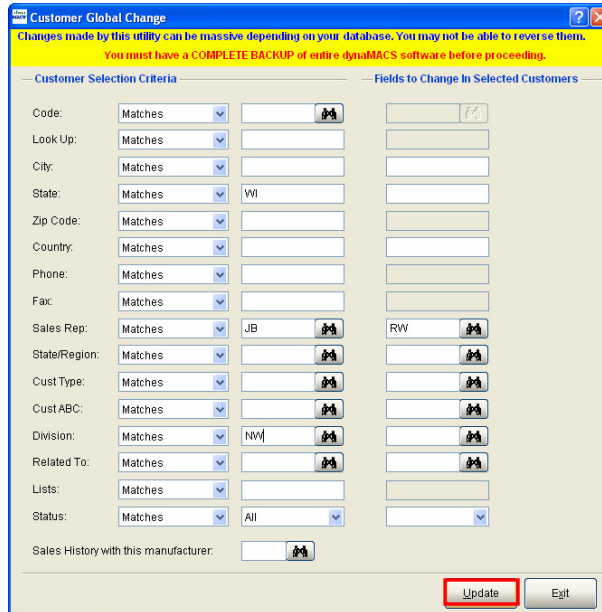
Customer Selection Criteria		Fields to Change In Selected Customers	
Code:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Look Up:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
City:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
State:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Zip Code:	Starts with <input type="text" value="537"/>	<input type="text"/>	<input type="text"/>
Country:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Phone:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Fax:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Rep:	Matches <input type="text" value="JB"/>	<input type="text" value="RW"/>	<input type="text"/>

This will move all of JB's customers that are located within the zipcode starting with 537 to RW.

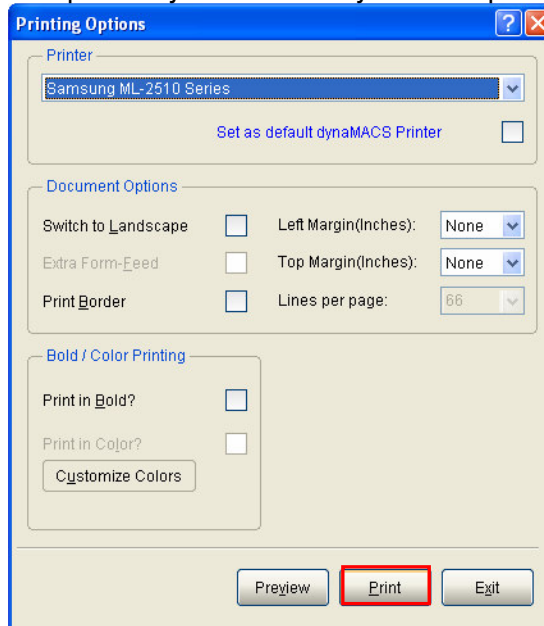
Customer Selection Criteria		Fields to Change In Selected Customers	
Code:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Look Up:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
City:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
State:	Matches <input type="text" value="WI"/>	<input type="text"/>	<input type="text"/>
Zip Code:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Country:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Phone:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Fax:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Rep:	Matches <input type="text" value="JB"/>	<input type="text" value="RW"/>	<input type="text"/>
State/Region:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Cust Type:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Cust ABC:	Matches <input type="text"/>	<input type="text"/>	<input type="text"/>
Division:	Matches <input type="text" value="D4"/>	<input type="text"/>	<input type="text"/>

This will move all of JB's customers that are located in the D4 division in Wisconsin to RW.

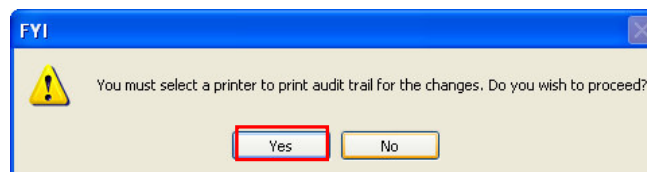
6. When finished with your selections, choose **UPDATE**.



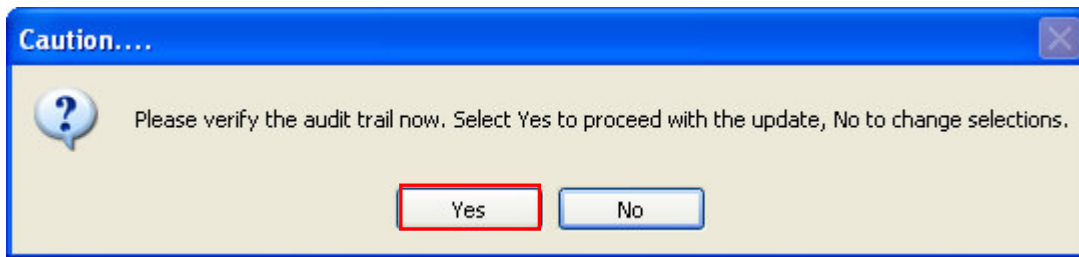
7. Print out the audit report for your records by select a printer and choosing **PRINT**.



8. If you decided not to print it out, you will get the following message: Select **YES**.



9. Once you have printed the audit trail, the following message will appear. Select **YES** only if the report is correct.



10. Wait a few moments while your request processes.
11. When finished, you will be at the main dynaMACS screen.

WARNING: This reassignment of the sales rep did NOT transfer any sales history to the new sales rep. Please see FAQ ET-103 for instructions