

How to transfer multiple customers' sales history from one sales rep to a newly assigned rep?

Summary

Transferring multiple customers' sales history from one sales rep to a different sales rep.

Requirements

Related FAQs: ET-102

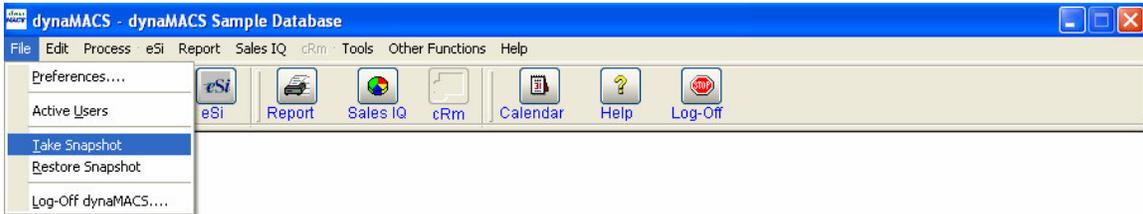
Module

Basic system >Edit>File Transfer Combine>Update History to Current Rep

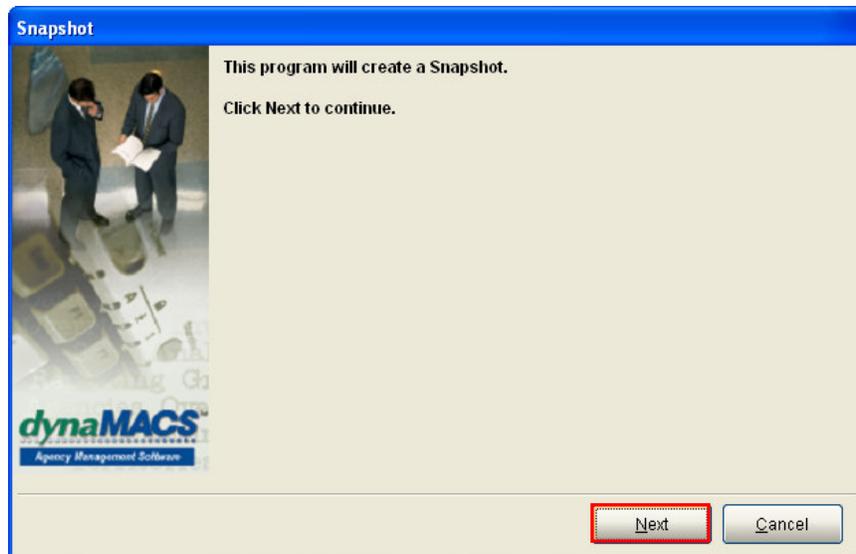
Solution

Follow the instructions below:

1. Take a Snapshot from the file menu.

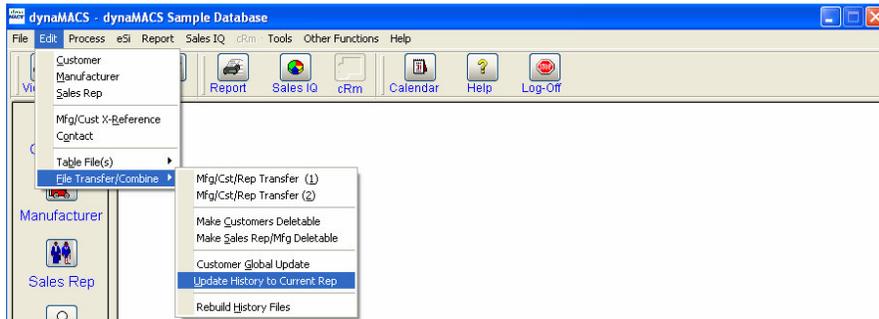


2. Select Next.

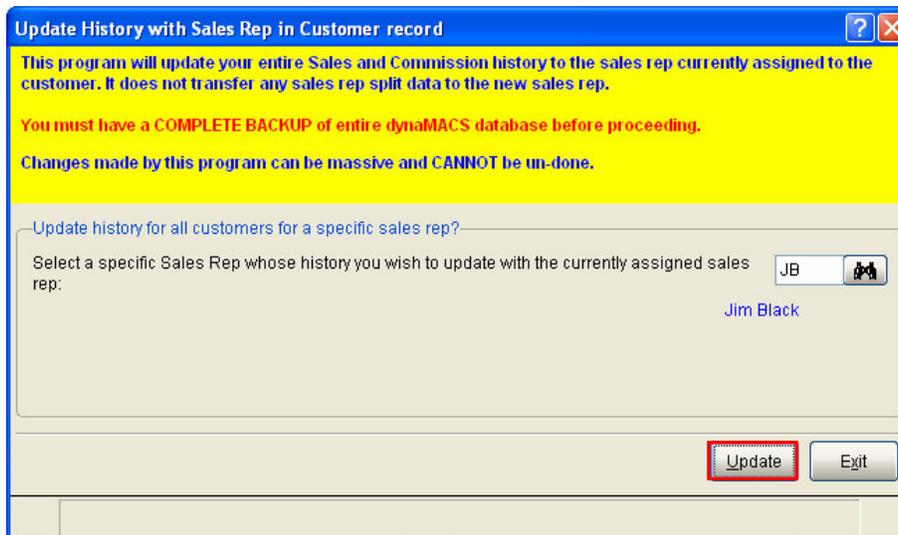


3. Wait for it to process (This will take several minutes).

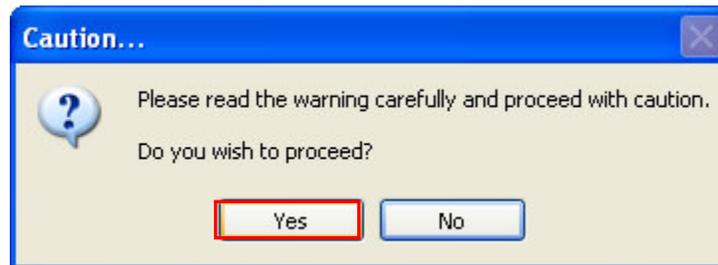
4. Select menu Edit>File Transfer/Combine>Update History to Current Rep.



5. Type in the old sales rep code and choose **UPDATE**.



6. At the Caution Message, select **YES**.



7. Wait while dynaMACS processes. When it is finished, you should be at the dynaMACS Main Screen.
8. Then go into Sales IQ to make sure that the change was made.