

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

<u>Module</u>

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

Solution

Follow the instructions below:

1. Take a Snapshot from the file menu.

🕮 dynaMACS - dynaMA	CS Sample Datab	ise					
File Edit Process eSi R	teport Sales IQ cRi	Tools Othe	er Functions Help				
Preferences	esi 🛛 🚑			?			
Active <u>U</u> sers	eSi Report	Sales IQ	cRm Calendar	Help	Log-Off		
<u>T</u> ake Snapshot							
<u>R</u> estore Snapshot							
Log-Off dynaMACS							

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**.

Update History with Sales Rep in Customer record	×
This program will update your entire Sales and Commission history to the sales rep currently assigned to the customer. It does not transfer any sales rep split data to the new sales rep.	÷
You must have a COMPLETE BACKUP of entire dynaMACS database before proceeding.	
Changes made by this program can be massive and CANNOT be un-done.	
Select a specific Sales Rep whose history you wish to update with the currently assigned sales	
rep:	
Update Exit	

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.