

UNDERSTANDING DOCUMENT TO SWAP PARTNER IN ODOO

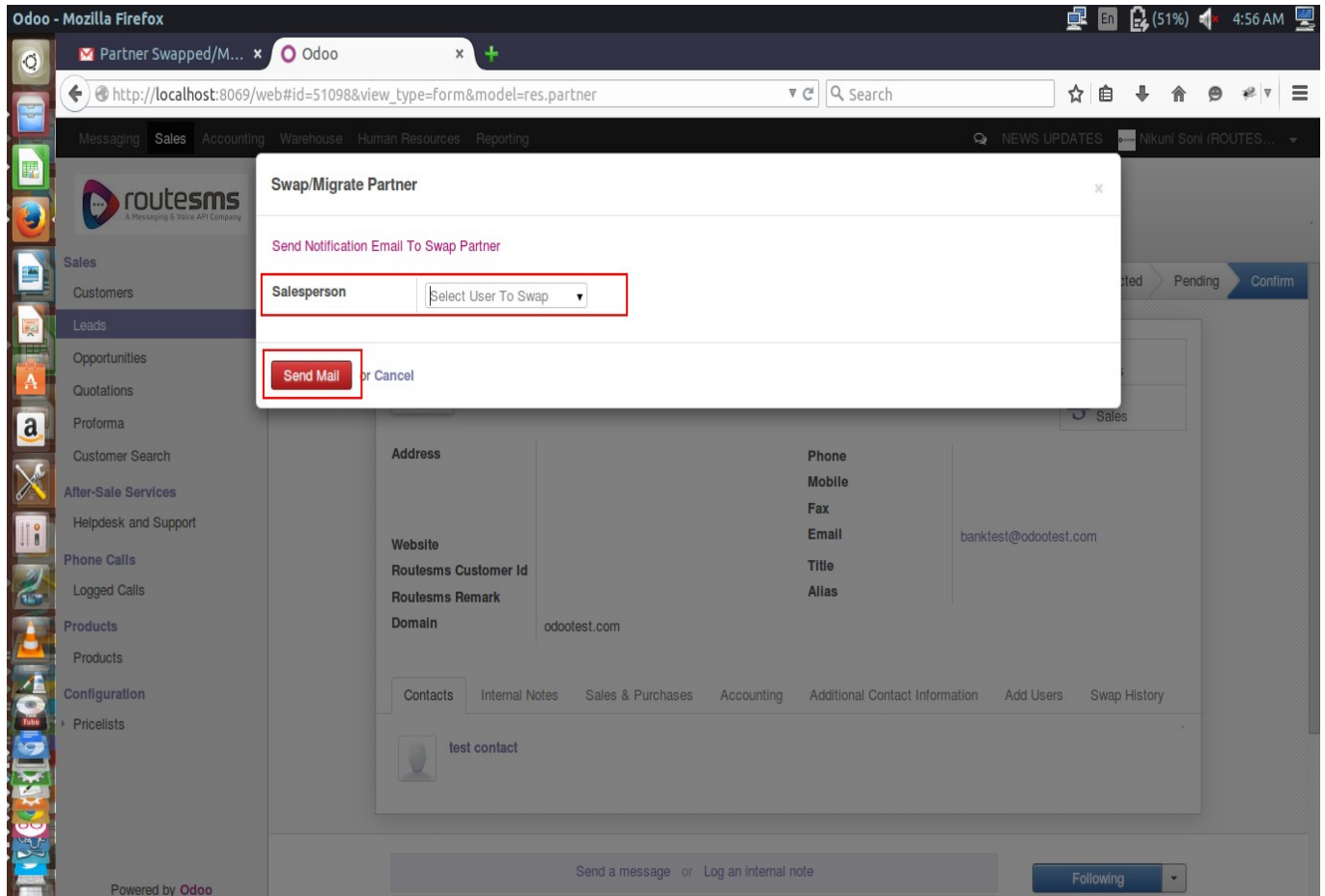
STEP 1 :

* Send swap/migrate partner request to accounts team via email

The screenshot displays the Odoo web application interface within a Mozilla Firefox browser. The address bar shows the URL: `http://localhost:8069/web#id=51098&view_type=form&model=res.partner`. The top navigation bar includes tabs for Messaging, Sales, Accounting, Warehouse, Human Resources, and Reporting. The left sidebar contains a menu with categories like Sales, Leads, Opportunities, Quotations, Proforma, Customer Search, After-Sale Services, Phone Calls, Products, and Configuration. The main content area is titled 'Leads / bankok client' and shows a form for a lead named 'bankok client' with ID R417969. The form includes fields for Address, Website, Routesms Customer Id, Routesms Remark, Domain, Phone, Mobile, Fax, Email, Title, and Alias. A dropdown menu is open from the 'More' button, showing options: Portal Access Management, Send Email To Accounts Team, Swap/Migrate Partner (highlighted with a red box), Contact Details, and Related Documents. The status bar at the bottom indicates 'Following'.

STEP 2:

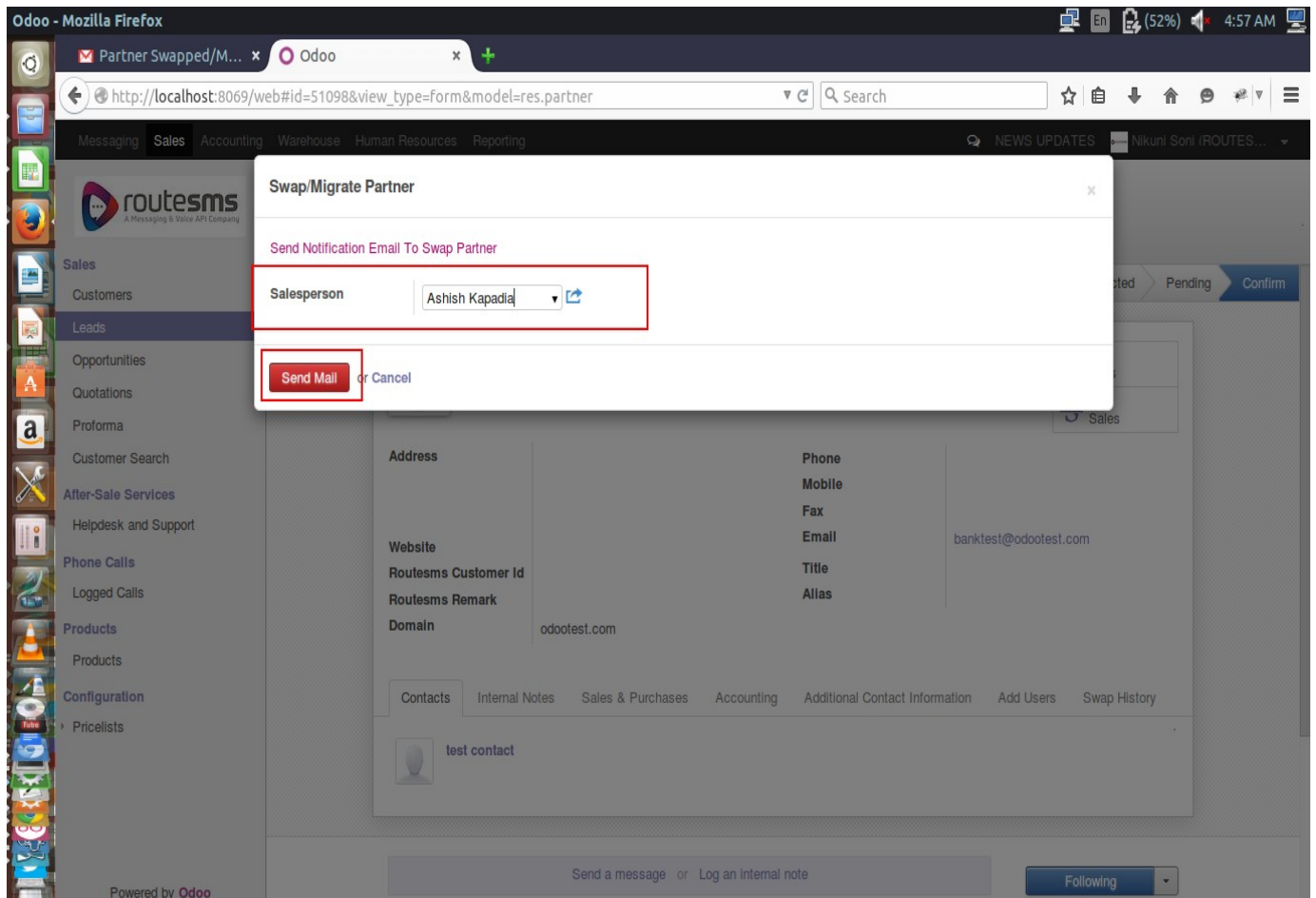
* Select Salesuser name to swap/migrate.



STEP 3:

* Partner and its associated documents like leads,proforma,invoices,payments will be swapped /migrated to selected salesperson from list.

*Click on “Send Mail” button to send email notification to accounts team.



STEP 4: (FOR ACCOUNT USERS ONLY)

* Accounts team will receive request notification via email.

* Change the salesperson as per request and click on “Save” button

The screenshot shows the Odoo web interface in Google Chrome. The browser address bar displays the URL: `localhost:8069/web#id=51098&view_type=form&model=res.partner`. The top navigation bar includes links for Messaging, Sales, Accounting, Human Resources, and Reporting. The left sidebar shows the 'routesms' logo and a list of applications: Messaging, Inbox, To: me, To-do, Archives, Organizer, Calendar, My Groups, Whole Company, and Join a group. The main content area is titled 'bankok client' and contains a form with various fields. The 'Save' button is highlighted in red. The 'Salesperson' field is also highlighted in red, showing 'Ashish Kapadia'. Other fields include Address (Street, City, State, ZIP, Country), Website, Vertical, Routesms Customer Id, Routesms Remark, Domain, Fax, Email, Title, and Alias. The bottom section of the form includes tabs for Contacts, Internal Notes, Sales & Purchases, Payment Follow-up, Accounting, and Additional Contact Information. The 'Salesperson' field is a dropdown menu with 'Ashish Kapadia' selected. The 'Company' field is a dropdown menu with 'ROUTESMS SOLUTIONS LIMITED' selected. The 'Customer' checkbox is checked, and the 'Supplier' checkbox is unchecked.

Odoo - Google Chrome

local host:8069/web#id=51098&view_type=form&model=res.partner

Apps For quick access, place your bookmarks here on the bookmarks bar. Import bookmarks now...

Messaging Sales Accounting Human Resources Reporting

NEWS UPDATES Asmita Shikwan

routesms A Messaging & Voice API Company

bankok client

Save Discard

Tags...

Address

Street...

City

State

ZIP

Country

Website

e.g. www.odoo.com

Vertical

Messaging

Routesms Customer Id

Routesms Remark

Domain

odootest.com

Fax

Email

banktest@odootest.com

Title

Alias

Alias(To Be Fill Up By Accounts)

Contacts Internal Notes Sales & Purchases Payment Follow-up Accounting Additional Contact Information

Add Users Swap History

Salesperson

Ashish Kapadia

Customer

Supplier

RM

Responsible(To Be Fill Up By Accounts)

Company

ROUTESMS SOLUTIONS LIMITED

Powered by Odoo

STEP 5:

* After successful swapping /migration of partner along with associated documents, salesperson can view history of swapped client.

* Swapped history shows the partner migration logs from one salesperson to another.

The screenshot displays the Odoo CRM interface in a Google Chrome browser. The address bar shows the URL: `localhost:8069/web#id=51098&view_type=form&model=res.partner`. The top navigation bar includes tabs for Messaging, Sales, Accounting, Human Resources, and Reporting. The left sidebar contains a 'routesms' logo and a 'Messaging' section with options like 'Inbox', 'To: me', 'To-do', 'Archives', 'Organizer', 'Calendar', and 'My Groups'. The main content area is titled 'bankok client' and features a 'Save or Discard' button. Below this, there are tabs for 'Contacts', 'Internal Notes', 'Sales & Purchases', 'Payment Follow-up', 'Accounting', and 'Additional Contact Information'. The 'Swap History' tab is selected and highlighted with a red box. It contains a table with columns 'From', 'To', and 'Date'. Below the table, there is a 'From' button. At the bottom of the interface, there is a section for 'Send a message or Log an internal note' with a list of recent updates: 'Status: Pending → Confirm' by Asmita Shigwan, 'Status: Pending' by Nikunj Soni, and 'Partner created' by Nikunj Soni. The bottom status bar shows the URL: `localhost:8069/web#notebook_page_73`.

THANK YOU