

SEND SWAP PARTNER REQUEST TO SALE SUPERUSER/HIGH AUTHORITY

STEP 1:

* Select the partners to swap

* Single partner can be selected for sending swap request or in bulk

The screenshot shows the 'Customers' page in the routesms CRM. The left sidebar contains navigation menus for Sales, After-Sale Services, Phone Calls, Products, and Configuration. The main area displays a table of customers with columns for Name, Lead Status, Customer ID, and Salesperson. A search bar at the top right shows 'Customers x'. A red arrow points from a group of selected customer names to the text 'Partner selected in bulk for swap'.

Name	Lead Status	Customer ID	Salesperson
<input checked="" type="checkbox"/> 01telecom.net	Opportunity		Nikunj Soni
<input checked="" type="checkbox"/> 101host	Converted Client	24715	Nikunj Soni
<input checked="" type="checkbox"/> 2208023 Ontario Inc (SMSify)	Converted Client	R411021	Nikunj Soni
<input checked="" type="checkbox"/> 247 Technologies	Converted Client	R411025	Nikunj Soni
<input type="checkbox"/> 3G Digitals	Converted Client	R411026	Nikunj Soni
<input type="checkbox"/> 3G IT Consultancy	Converted Client	R411027	Nikunj Soni
<input type="checkbox"/> 3G Telecommunications Limited	Converted Client	R411028	Nikunj Soni
<input type="checkbox"/> 42com Telecommunication GmbH	Converted Client	R411029	Nikunj Soni
<input checked="" type="checkbox"/> 5megas.com	Duplicate Lead	R401030	Nikunj Soni
<input checked="" type="checkbox"/> 7B GROUP LTD	Converted Client	R411031	Nikunj Soni
<input checked="" type="checkbox"/> ABRA Inn FZE	Converted Client	R411032	Nikunj Soni
<input type="checkbox"/> Advace Media LTD	Converted Client	R411033	Nikunj Soni
<input type="checkbox"/> Advanta Infotech	Converted Client	R411034	Nikunj Soni
<input type="checkbox"/> AeroStatus Corporation	Converted Client	R411035	Nikunj Soni
<input type="checkbox"/> AFRICOM INTL, LLC	Converted Client	R411036	Nikunj Soni
<input type="checkbox"/> Africweb	Opportunity	R411037	Nikunj Soni
<input type="checkbox"/> Afrisoft International Concept	Converted Client	R411038	Nikunj Soni
<input type="checkbox"/> Agencia Sawi	Opportunity	R4041039	Nikunj Soni
<input checked="" type="checkbox"/> Alamraya	Converted Client	R411040	Nikunj Soni
<input checked="" type="checkbox"/> ALEJ	Converted Client	R411041	Nikunj Soni
<input type="checkbox"/> Alfredo Dolce	Opportunity	R411042	Nikunj Soni

STEP 2:

* Click on “send swap partner request” from “More” option list

routesms
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Customers

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<input type="checkbox"/>	Name		Customer ID	Salesperson
<input checked="" type="checkbox"/>	01telecom.net		R404377	Nikunj Soni
<input checked="" type="checkbox"/>	101host		R400216	Nikunj Soni
<input checked="" type="checkbox"/>	2208023 Ontario Inc (SMSify)		R417791	Nikunj Soni
<input checked="" type="checkbox"/>	247 Technologies	Converted Client	R110058	Nikunj Soni
<input type="checkbox"/>	3G Digitals	Converted Client	R110118	Nikunj Soni
<input type="checkbox"/>	3G IT Consultancy	Converted Client	R110120	Nikunj Soni
<input type="checkbox"/>	3G Telecommunications Limited	Converted Client	R110124	Nikunj Soni
<input type="checkbox"/>	42com Telecommunication GmbH	Converted Client	R110158	Nikunj Soni
<input checked="" type="checkbox"/>	5megas.com	Duplicate Lead	R404415	Nikunj Soni
<input checked="" type="checkbox"/>	7B GROUP LTD	Converted Client	R110188	Nikunj Soni
<input checked="" type="checkbox"/>	ABRA Inn FZE	Converted Client	R110334	Nikunj Soni
<input checked="" type="checkbox"/>	Adavice Media LTD	Converted Client	R110446	Nikunj Soni
<input type="checkbox"/>	Advanta Infotech	Converted Client	R110552	Nikunj Soni
<input type="checkbox"/>	AeroStatus Corporation	Converted Client	R110591	Nikunj Soni
<input type="checkbox"/>	AFRICOM INTL, LLC	Converted Client	R110657	Nikunj Soni
<input type="checkbox"/>	Afriweb	Opportunity	R414402	Nikunj Soni
<input type="checkbox"/>	Afrisoft International Concept	Converted Client	R110679	Nikunj Soni
<input type="checkbox"/>	Agencia Sawi	Opportunity	R404543	Nikunj Soni
<input checked="" type="checkbox"/>	Alamraya	Converted Client	R110903	Nikunj Soni
<input checked="" type="checkbox"/>	ALEJ	Converted Client	R110937	Nikunj Soni
<input type="checkbox"/>	Alfredo Dolce	Opportunity	R414079	Nikunj Soni

Export
Partner Mass Mailing
Automatic Merge
Portal Access Management
Send Email To Accounts Team
Send Swap Partner Request

Click to send swap request to sale superuser / high authority user

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STEP 3:

* Select new BM

* Select Sale superuser.

Sale superuser is a salesperson who has the authority to send swap partner request to accounts team

Send Swap Partner Request

Send Notification Email To Sale SuperUser To Swap Partner

Salesperson: Ashish Kapadia (New BM)

Send Request To: Shweta Patil (Sale Superuser receives swap request from BM)

Send Mail To SuperUser or Cancel

	Company Name	Status	ID	Salesperson
<input type="checkbox"/>	3G IT Consultancy	Converted Client	R110120	Nikunj Soni
<input type="checkbox"/>	3G Telecommunications Limited	Converted Client	R110124	Nikunj Soni
<input type="checkbox"/>	42com Telecommunication GmbH	Converted Client	R110158	Nikunj Soni
<input checked="" type="checkbox"/>	5megas.com	Duplicate Lead	R404415	Nikunj Soni
<input checked="" type="checkbox"/>	7B GROUP LTD	Converted Client	R110188	Nikunj Soni
<input checked="" type="checkbox"/>	ABRA Inn FZE	Converted Client	R110334	Nikunj Soni
<input checked="" type="checkbox"/>	Adavice Media LTD	Converted Client	R110446	Nikunj Soni
<input type="checkbox"/>	Advanta Infotech	Converted Client	R110552	Nikunj Soni
<input type="checkbox"/>	AeroStatus Corporation	Converted Client	R110591	Nikunj Soni
<input type="checkbox"/>	AFRICOM INTL, LLC	Converted Client	R110657	Nikunj Soni
<input type="checkbox"/>	Africweb	Opportunity	R414402	Nikunj Soni
<input type="checkbox"/>	Afrisoft International Concept	Converted Client	R110679	Nikunj Soni
<input type="checkbox"/>	Agencia Sawi	Opportunity	R404543	Nikunj Soni
<input checked="" type="checkbox"/>	Alamraya	Converted Client	R110903	Nikunj Soni
<input checked="" type="checkbox"/>	ALEJ	Converted Client	R110937	Nikunj Soni
<input type="checkbox"/>	Alfredo Dolce	Opportunity	R414079	Nikunj Soni

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* Sale superuser will receive email notification along with excel sheet holding swap partner details like partner name, odoo id, old BM, new BM

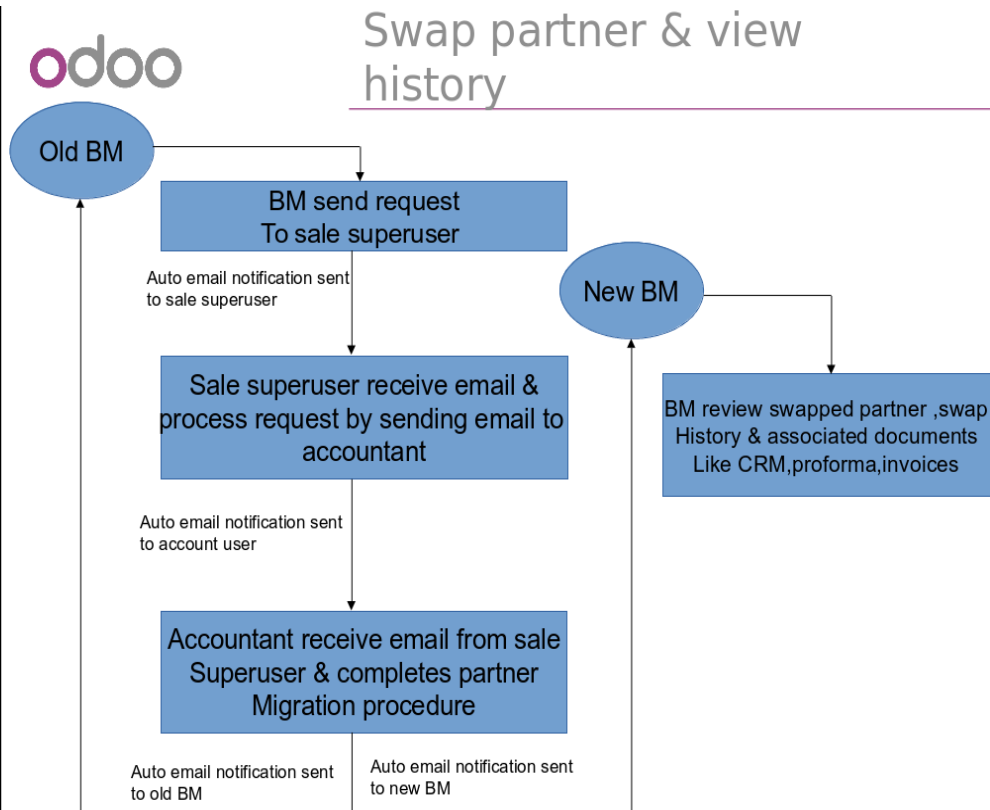
The image shows a screenshot of the LibreOffice Calc application. The title bar at the top reads "partner_migration2016-01-3120_34_49.xlsx - LibreOffice Calc". The interface includes a standard toolbar with icons for file operations, editing, and formatting. Below the toolbar is a formula bar showing "C6" and a function dropdown set to "f(x)".

The spreadsheet is organized into columns labeled A through K. The first four columns contain data:

1	Partner Name	Odoo Id	Old BM	New BM
3	01telecom.net	R000000	Nikunj soni	ashish kapadia
4	2208023 Ontario Inc (SMSify)	R000001	shazz sales old	ashish kapadia
6				

The status bar at the bottom shows "Sheet1" selected, a search bar with "Find", and a zoom level of 100%.

PARTNER SWAP FLOWCHART



THANK YOU

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