

## SWAP PARTNER FEATURE FOR SINGLE & BULK REQUEST

### STEP 1 (Single Request):

- \* Click swap partner submenu
- \* Enter required details

Search Partner

Send Notification Email To Swap Partner

New Salesperson  Select New BM

Odoo Id  Enter Odoo Id of Old BM partner/client

Bulk Request ☐

or  or

Click to send email to accountant

click to view details of partner

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## STEP 2 (Bulk request):

- \* Click on “bulk request” box
- \* Select Old BM and New BM
- \* Click on “add item” to select Old BM partners

routesm  
A Messaging & Social CRM Solution

Sales Customers Leads Opportunities Quotations Proforma Customer Search Swap Partner After-Sale Services Helpdesk and Support Phone Calls Logged Calls Products Configuration Pricelists

Search Partner

Send Notification Email To Swap Partner

Old Salesperson Karthik Vijayan Select Old BM

New Salesperson Pramod s. Chalke Select New BM

Bulk Request ☒ Mark this box to send request in bulk

Partner

Name	Odoo Id
Add an item	

Send Mail or Cancel

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### STEP 3:

\* Select multiple partners of Old BM

The screenshot shows the 'Add: Partner' dialog in the routesn application. The dialog has a search bar at the top and a list of partners below. The list has two columns: 'Name' and 'Odoo Id'. The first five partners are selected with checkboxes. A red box highlights these five partners. A red arrow points to the 'ALLAHABAD BANK, ZONAL OFFICE DEOGHAR' entry with the text 'Select partner to swap'.

<input type="checkbox"/>	Name	Odoo Id
<input type="checkbox"/>	Admark Solutions	R110488
<input checked="" type="checkbox"/>	AdScribe India Inc.	R417735
<input checked="" type="checkbox"/>	A.K.CORP	R110222
<input checked="" type="checkbox"/>	Allahabad Bank	R111015
<input checked="" type="checkbox"/>	ALLAHABAD BANK,ZONAL OFFICE DEOGHAR	R400853
<input checked="" type="checkbox"/>	Allahabad Bank, Zonal Office, Sitapur	R402053
<input type="checkbox"/>	Amiable Telecom & Utility Pvt. Ltd	R417569
<input type="checkbox"/>	ANLEAGUES IT SYSTEMS	R111311
<input type="checkbox"/>	Apex Info Sys Solutions	R401170
<input type="checkbox"/>	A.V.F. Enterprises	R110228
<input type="checkbox"/>	Bank of Maharashtra	R111974
<input type="checkbox"/>	Bank of Maharashtra (BOMOTPPRO)	R111976
<input type="checkbox"/>	Bank of Maharashtra (BOMPCUL)	R416776
<input type="checkbox"/>	Bank of Maharashtra (BOMPSECURITY)	R416778
<input type="checkbox"/>	Bank of Maharashtra (BOMSHOIT)	R111978
<input type="checkbox"/>	Bank of Maharashtra	R403820
<input type="checkbox"/>	Bank of Maharashtra	
<input type="checkbox"/>	Bank Of Maharashtra (BOMCBSPRO)	R400971

#### STEP 4:

\* Scroll down & freeze the selection by clicking on “select” button

Customers - Odoo - Mozilla Firefox

<input type="checkbox"/>	Company Name	ID
<input type="checkbox"/>	egpay India Pvt. Ltd..	R115382
<input type="checkbox"/>	Ezone and EzoneOnline	R400504
<input type="checkbox"/>	Future Corporate Resources Limited	R116645
<input type="checkbox"/>	Future Corporate Resources Limited-T24	R402344
<input type="checkbox"/>	Future Corporate Resources Ltd-FGSF	R402346
<input type="checkbox"/>	Future Lifestyle Fashions - aLL	R116653
<input type="checkbox"/>	Future Lifestyle Fashions – Brand Factory	R116655
<input type="checkbox"/>	Future Lifestyle Fashions - Converse	R404305
<input type="checkbox"/>	Future Lifestyle Fashions - Lee Cooper	R400173
<input type="checkbox"/>	Future Lifestyle Fashions Ltd.- I AM IN	R404317
<input type="checkbox"/>	Future Lifestyle Fashions - Planet Sports	R116657
<input type="checkbox"/>	Future lifestyle Ltd -Central	R116659
<input type="checkbox"/>	Future Retail Limited BBPC	R116675
<input type="checkbox"/>	Future Retail Limited – Big Bazaar – Akhil	R116667
<input type="checkbox"/>	Future Retail Limited Big Bazaar Hanish	R403822
<input type="checkbox"/>	Future Retail Limited Big Bazaar Marketing	R401195
<input type="checkbox"/>	Future Retail Limited – Central	R116669
<input type="checkbox"/>	Future Retail Limited ( Chitradeep )	R116673
<input type="checkbox"/>	Future Retail Limited - Ezone	R116671

**Select** Create or Cancel Click to freeze the selection

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## STEP 5:

\* Selected partners are added

\* Click “Send Mail” button to send bulk request via email to accountant

**Search Partner**

Send Notification Email To Swap Partner

Old Salesperson: Karthik Vijayan

New Salesperson: Pramod s. Chalke

Bulk Request: ☒

Partner

Name	Odoo Id	
AdScribe India Inc.	R417735	
A.K.CORP	R110222	
Allahabad Bank	R111015	
ALLAHABAD BANK,ZONAL OFFICE DEOGHAR	R400853	
Allahabad Bank, Zonal Office, Sitapur	R402053	

[Add an item](#)

**Send Mail** or or Cancel

Partner added

Click to send email to accounts team

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# THANK YOU

CONTACT ME :

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