

ASSIGN SWAP PARTNER/CLIENT ACCESS RIGHTS TO USERS

STEP 1 (For HR and SuperAdmin user only):

- * Go to settings -> user-> user -> open user to assign partner swap rights
- * Go to bottom of page and check the box “Swap Partner”

The screenshot shows the 'routesms' user settings interface for 'Lester Dsouza'. The left sidebar contains a navigation menu with categories like Accounting, Human Resources, Marketing, Knowledge, General Settings, Companies, Users, Translations, and Custom Configuration. The 'Users' category is selected, and the 'Users' sub-item is highlighted. The main content area displays a list of settings for the user, organized into sections: Manage Properties of Product, Usability, Other, and Technical Features. The 'Swap Partner' checkbox under the 'Other' section is checked and highlighted with a red box. A red arrow points to this checkbox with the text 'This user will have authority to swap client'. The top navigation bar includes links for Messaging, Sales, Project, Accounting, Warehouse, Human Resources, Knowledge, Reporting, and Settings. The bottom of the page shows 'Powered by Odoo'.

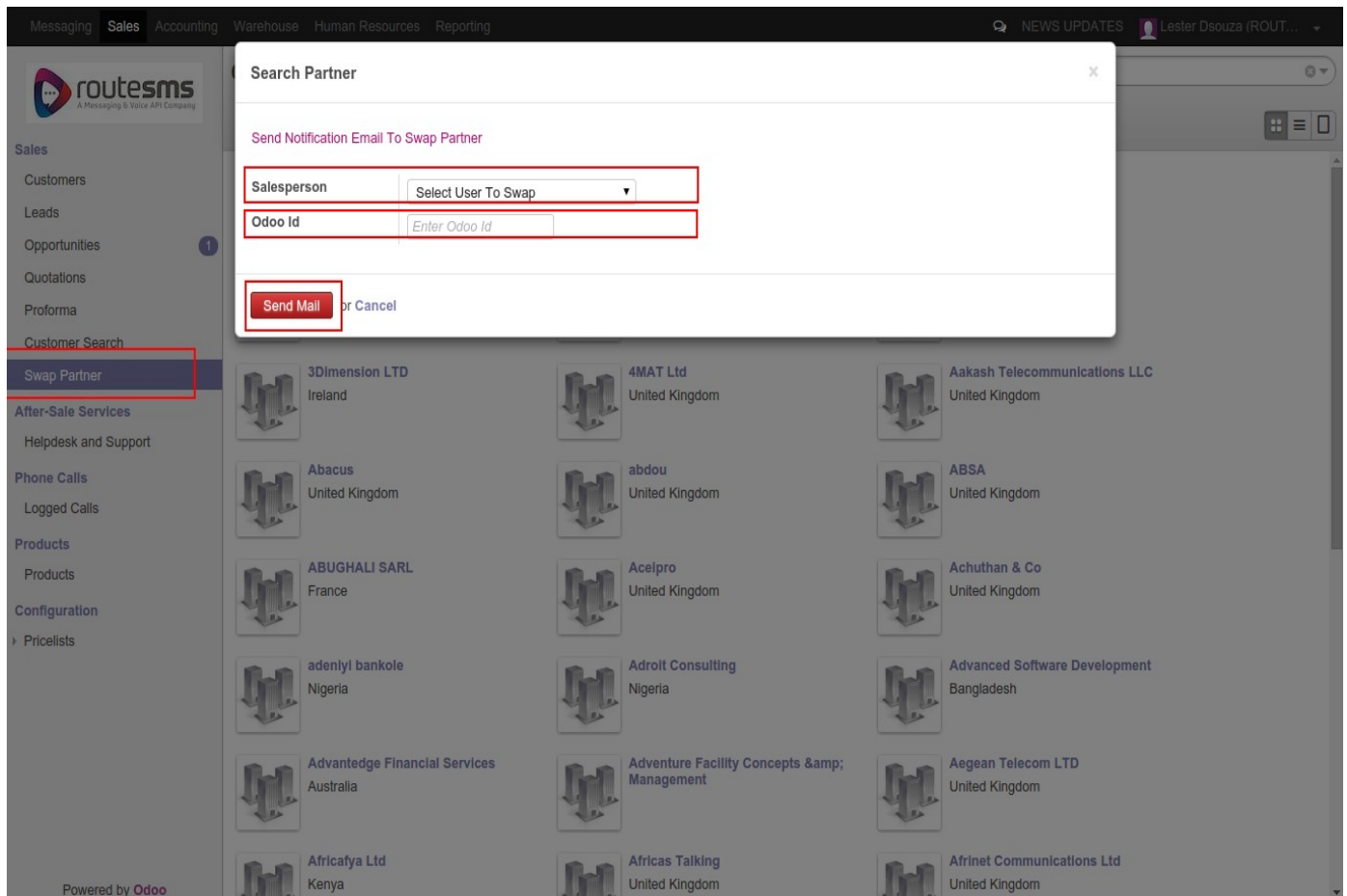
Setting	Value
Manage Properties of Product	<input type="checkbox"/>
Manage Sales Teams	<input type="checkbox"/>
Multi Currencies	<input checked="" type="checkbox"/>
Properties on Lines	<input type="checkbox"/>
Sales Pricelists	<input checked="" type="checkbox"/>
Task Delegation	<input type="checkbox"/>
Time Estimation on Tasks	<input type="checkbox"/>
Manage Push and Pull Inventory flows	<input type="checkbox"/>
Manage Secondary Unit of Measure	<input type="checkbox"/>
Pro-forma Invoices	<input type="checkbox"/>
Purchase Pricelists	<input type="checkbox"/>
Show Scheduled Calls Menu	<input type="checkbox"/>
Task's Work on Tasks	<input type="checkbox"/>
View Online Payment Options	<input type="checkbox"/>
Usability	
Multi Companies	<input checked="" type="checkbox"/>
Technical Features	<input type="checkbox"/>
Other	
293 Holiday user	<input type="checkbox"/>
293 Holiday Users AIR Ticket	<input type="checkbox"/>
Activate Invoice Line	<input checked="" type="checkbox"/>
City Code	<input checked="" type="checkbox"/>
Deactivate Report Baner	<input type="checkbox"/>
Partner Filter	<input checked="" type="checkbox"/>
Public	<input type="checkbox"/>
Survey / User	<input checked="" type="checkbox"/>
Vertical Business	<input checked="" type="checkbox"/>
293 Holiday Users	<input type="checkbox"/>
293 Holiday Users Others	<input type="checkbox"/>
Activate Report Baner	<input checked="" type="checkbox"/>
Contact Creation	<input checked="" type="checkbox"/>
HR Setting Rights	<input type="checkbox"/>
Portal	<input type="checkbox"/>
Survey / Manager	<input type="checkbox"/>
Swap Partner	<input checked="" type="checkbox"/>

STEP 2 (For Sale user only):

- * Go to partner/client to swap

- * Click “More” button and click “Swap/Migrate Partner”

- * This option is visible to those users only who has “swap partner” authority (marked by HR in step 1)



THANK YOU