

Reassign Contacts in JOBZ!

A Sales Rep has access to a given contact record in ADDRESS by virtue of the fact that their name is in the Sales Rep field on that record. At the most basic level, changing the Sales Rep name changes who can access that contact.

The Sales Rep name can be changed on either the Input screen Ownership tab or in the List view. (1)

With version 14.0, either a Manager OR the current Sales Rep can reassign a contact by selecting a different rep's name in the Reassign To field and clicking the Reassign link. The change will be recorded in the Contact History fields. (2)

In versions prior to 14.0, a Manager can manually change the name of the Sales Rep and add the event to Contact History, using the Last Contact fields to note the change.

Tip: Pull down Go To > Manager, and select the History tab for a view of that Contact History, and a private Manager-only notes field. Check the Monitor This Contact box, (3) and any time you wish, click the List Monitored button to see all such contacts. (4)

To automate the reassignment process and keep track of the history, perform a FIND for all contacts that you want to reassign to a new single rep, and change to the \$ View list. (5)

Use the Omit button [O] to narrow down the found set. (6)

Click the link in the upper right Prepare to Reassign Accounts. This will make a note of the rep currently assigned to each of the contacts in the found set. (7)

Then change the rep in the top, highlighted row to the new rep, and click the Reassign X link that appears in that row. It will then go through all the contacts, changing them to the new rep, and the history field will contain an entry noting the date of reassignment and who it was reassigned from. (8)

To give the new rep access to the actual JOBS that a previous rep had completed for that customer, see our PDF Brief "Reassign Jobs in JOBZ!"

The image illustrates the reassignment process in JOBZ! through several screenshots:

- Top Left:** A screenshot of the 'Ownership' tab for a contact. The 'Sales Rep' field is set to 'Jim Taylor' (ID 7307) from 'Southern California', representing 'Carpe Data'.
- Top Right:** A dropdown menu showing a list of sales reps. 'Jim Taylor' is selected. A red arrow labeled '1' points from this dropdown to the 'Sales Rep' field in the top-left screenshot.
- Bottom Left:** A screenshot of the 'Ownership' tab showing the 'Reassign To' field set to '(Give Away Contact)'. A red arrow labeled '2' points from this field to the 'Reassign This Contact' dialog box.
- Bottom Right:** A dialog box titled 'Reassign This Contact' with the message 'This contact will be reassigned to: Tanya Taylor'. It has 'OK' and 'Cancel' buttons.

History Challenge Segments Campaigns Housekeeping Budget Account Lists

Number of Contacts: 3
Days Since Last Contact: 0

Last Contact: 1/22/2015
What: Reassigned
Comment: From: Jim Taylor
Next Contact: [Empty]
What: [Empty]
Why: [Empty]

Contact History

1/22/2015 JT: Reassigned From: Jim Taylor
7/27/2014: Newsletter
9/15/2013: Good Conversation

Budget
YTD
Last Year

Manager's Private Notes
These notes are visible only to Managers, by using the pull-down Go To > Manager, and selecting the History tab. Check the Monitor This Contact box to keep an eye on progress- click the List Monitored button to see all such contacts.

Monitor This Contact >

List Monitored Single Contact Report

Sales Rep's Manager as set in Personalization: Jim Taylor jim@carpedata.com

Go To 1 / 5 << < > >> Organize New... Actions

Segment View Date View **\$ View**

Company	Name	Lead Source	Modified	Select X	Category	Vertical
Buffalo Rome	Allen Wrench	408-666-7356		<input type="checkbox"/>	Account	Agency
Knowhow	Heywood Jabuzzoff	408-666-7356		<input type="checkbox"/>	Account	Annual
Abort Retry Ignore	Caesar Boldly	408-666-7356		<input type="checkbox"/>	Account	Target
Garden Supply	Ev Shafirir	408-666-7356		<input checked="" type="checkbox"/>	Account	
Primary Color, Inc.	David Kephart	310-321-6468		<input type="checkbox"/>	Account	User

Output Find... HELP -Demo Demo Dates Current

Clear X Find Select X X All [Prepare to Reassign Accounts](#)

Sales Rep	Created	12 Months	YTD	Last Year	Budget
Jimmy Buffett					Reassign 5
Dave Kephart					
Dave Kephart					
Dave Kephart					
Dave Kephart					

Reassign All
Assign all 5 contacts in the found set to this rep: Jimmy Buffett
OK Cancel