



User Manual – CM & SM – Referral Transfer

FNTG Connect

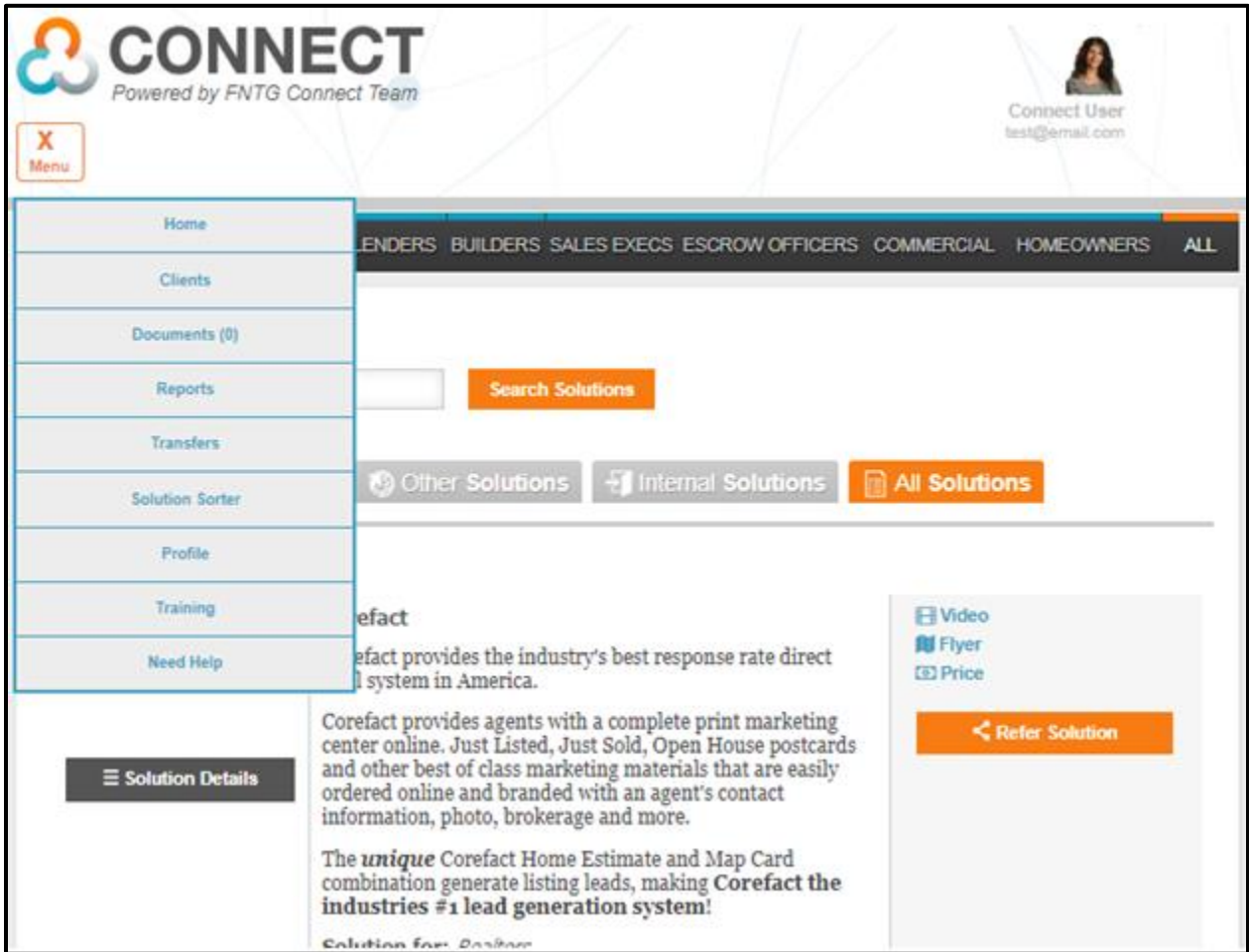
2019

Version 1.0



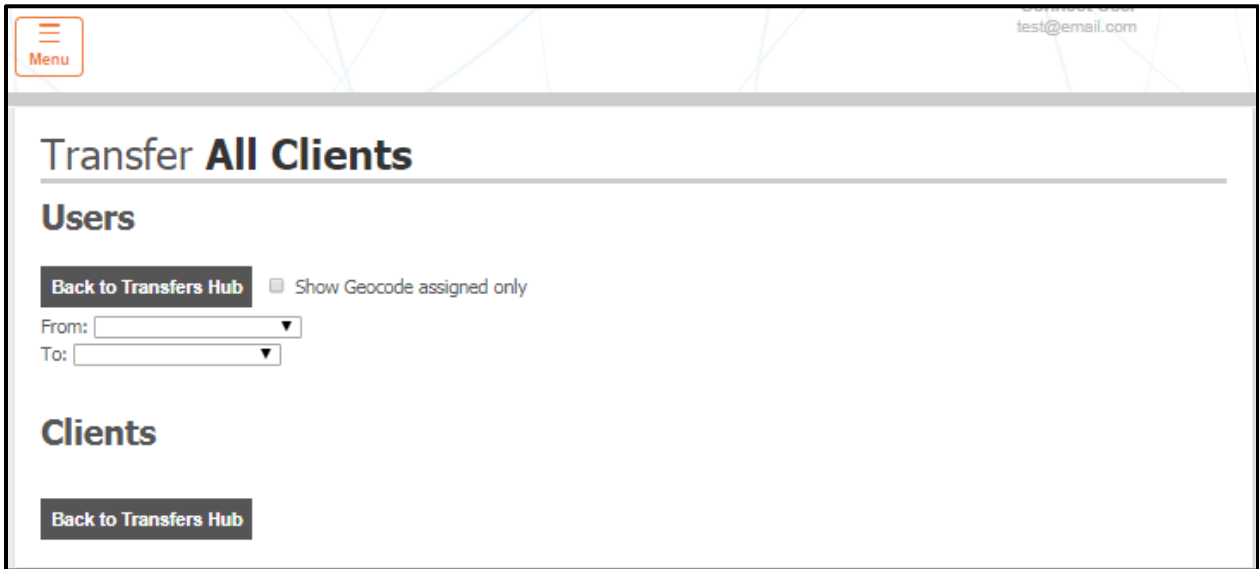
County Manager & Sales Manager To Transfer Referrals

1. On logging in, under **Menu**, click **Transfers**.

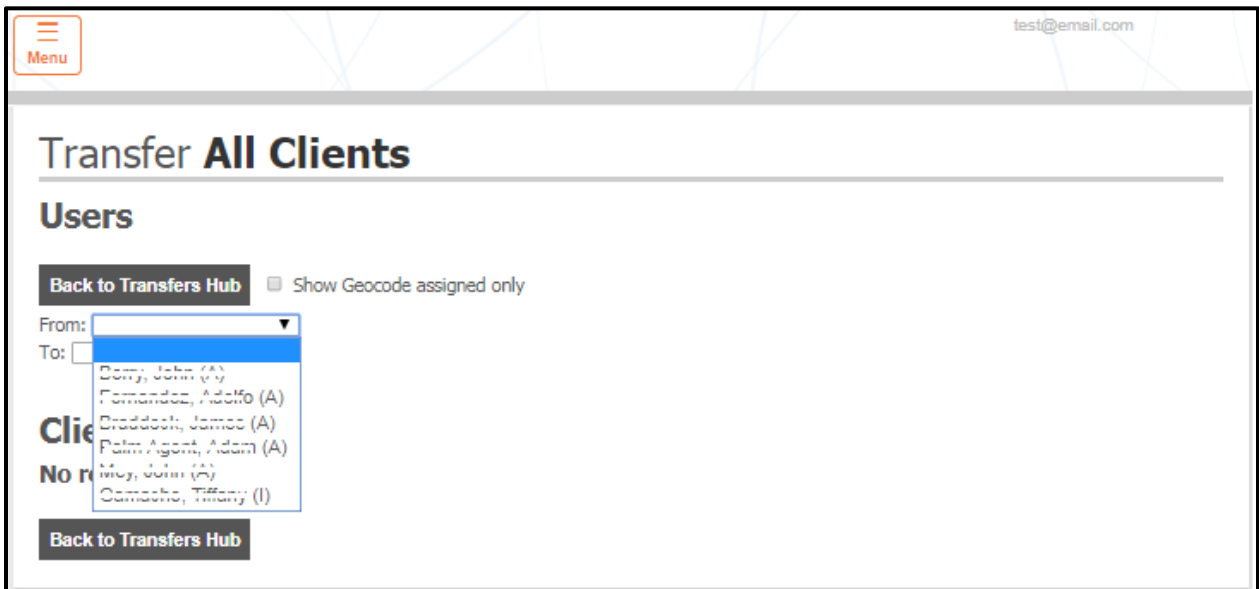




Transfer All Clients page appears. Please uncheck **Show Geocode assigned only** checkbox.



2. Under the **From** field, select a name of the user from whom the referral needs to needs to be transferred.





The list of referrals under the selected rep appears.

Transfer **All Clients**

Users

Back to Transfers Hub Show Geocode assigned only

From: Gamache, Tiffany (1) ▼

To: ▼

Clients

<input type="checkbox"/>	Name	Product	Referral Date
<input type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-05

Back to Transfers Hub

3. Check the required referrals to select the referrals to be transferred.

Transfer **All Clients**

Users

TRANSFER CLIENTS

Back to Transfers Hub Show Geocode assigned only

From: Gamache, Tiffany (1) ▼

To: ▼

Clients

<input type="checkbox"/>	Name	Product	Referral Date
<input checked="" type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-05

TRANSFER CLIENTS

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4. In the **To** pull-down, select the a name of the user to whom the referral needs to be transferred to.



Transfer All Clients

Users

TRANSFER CLIENTS

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From:

To:

<input type="checkbox"/>	Name	Product	Referral Date
<input checked="" type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-05

TRANSFER CLIENTS

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5. Click **Transfer Referral**.

Transfer All Clients

Users

TRANSFER CLIENTS

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From:

To:

Clients

<input type="checkbox"/>	Name	Product	Referral Date
<input checked="" type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	gamache, tiffany	EC Purchasing	2013-09-05

TRANSFER CLIENTS

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A confirmation pop up with the option **Yes** and **No** appears.

Transfer **All Clients**

Users

TRANSFER CLIENTS

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From: Camacho, Tiffany (A)

To: Berry, John (A)

www.fntgconnect.com says

Are you sure you want to move 1 client(s) from Camacho, Tiffany (A) to Berry, John (A)?

OK
Cancel

Clients

	Name		
<input checked="" type="checkbox"/>	Camacho, Tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	Camacho, Tiffany	EC Purchasing	2013-09-05

TRANSFER CLIENTS

Back to Transfers Hub

6. To transfer referrals, click **Yes**.

Transfer **All Clients**

Users

TRANSFER CLIENTS

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From: Camacho, Tiffany (A)

To: Berry, John (A)

www.fntgconnect.com says

Are you sure you want to move 1 client(s) from Camacho, Tiffany (A) to Berry, John (A)?

OK
Cancel

Clients

	Name		
<input checked="" type="checkbox"/>	Camacho, Tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	Camacho, Tiffany	EC Purchasing	2013-09-05

TRANSFER CLIENTS

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7. To not transfer referrals, click **No**.



Transfer **All Clients**

Users

TRANSFER CLIENTS
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From:
 To:

www.fntgconnect.com says

Are you sure you want to move 1 client(s) from Gamache, Tiffany (A) to Berry, John (A)?

Clients

<input type="checkbox"/>	Name		
<input checked="" type="checkbox"/>	Gamache, Tiffany	EC Purchasing	2013-09-03
<input type="checkbox"/>	Gamache, Tiffany	EC Purchasing	2013-09-05

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The referral gets transferred from one user to another user.