

Reassign Associate

The **Reassign Associate** feature can be used to change the associate on:

- **Appointments**
- **Customers**
- **Job Tasks (Repair and Custom)**
- **Associate Tasks**



NOTE: Only incomplete appointments, job tasks, and associate tasks will be updated. Completed records will not be changed.



NOTE: The **Calendar** and **Dashboard** features display service jobs (repairs, custom jobs, special orders, and appraisals) based on their **Intake Associate**. This cannot be changed via **Associate Reassign** at this time. You can manually change this by viewing the intake receipt and using **Supervisor > Change Associate**.

To reassign associates:

1. Click **Administrative > Associates > Reassign**. The **Reassign Associate** window will appear.

Reassign Associate

Current Associate: Nancy Gem (10) ▼

New Associate: Ben Gem (15) ▼

Re-Assign Targets

- Appointments (Incomplete only)
- Customers
- Job Tasks (Incomplete only)
- Tasks (Incomplete only)

OK Cancel

2. Use the **Current Associate** drop-down to select the associate you want to replace.
3. Use the **New Associate** drop-down to select the associate you want to replace them with.
4. Use the **Reassign Targets** checkboxes to choose which types of records to update.
5. Click **OK** to update the selected records.