

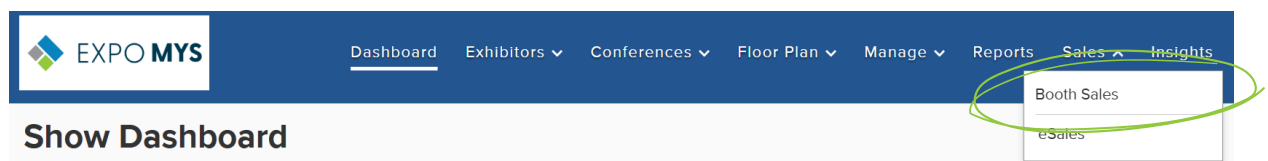
Sales Reps

Bulk Reassignment

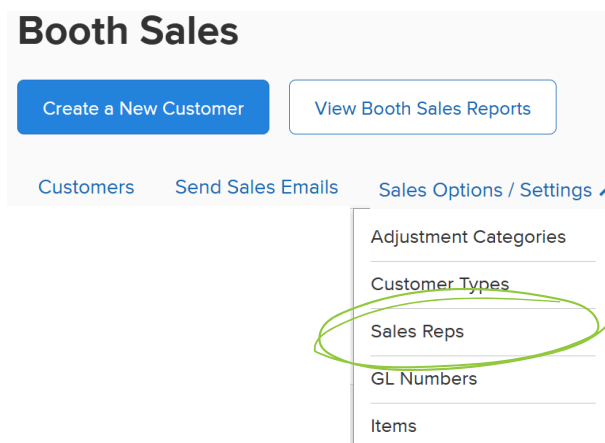
Bulk reassign a sales rep across customer records and line items in one action. Use this when onboarding a new rep, redistributing accounts, or offboarding a team member. This tool ensures your records stay accurate and up to date with minimal effort.

How To Make Bulk Updates to Sales Reps

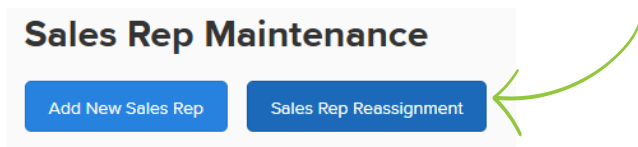
- 1 Access Booth Sales through the Sales dropdown on the Show Dashboard. Follow the path **Show Dashboard > Sales > Booth Sales**.



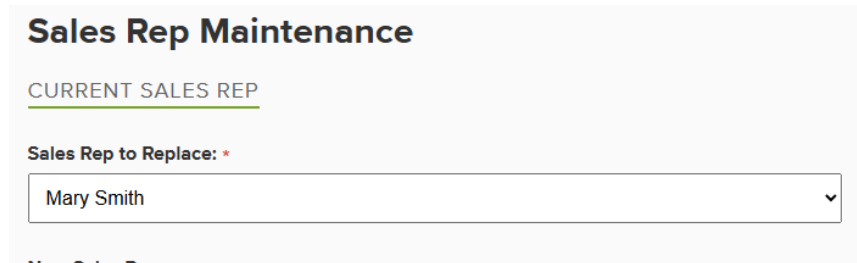
- 2 Using the **Sales Options / Settings** dropdown, select **Sales Reps**.



3 Click **Sales Rep Reassignment**.



4 **Sales Rep to Replace:** Select the sales rep you want to replace.

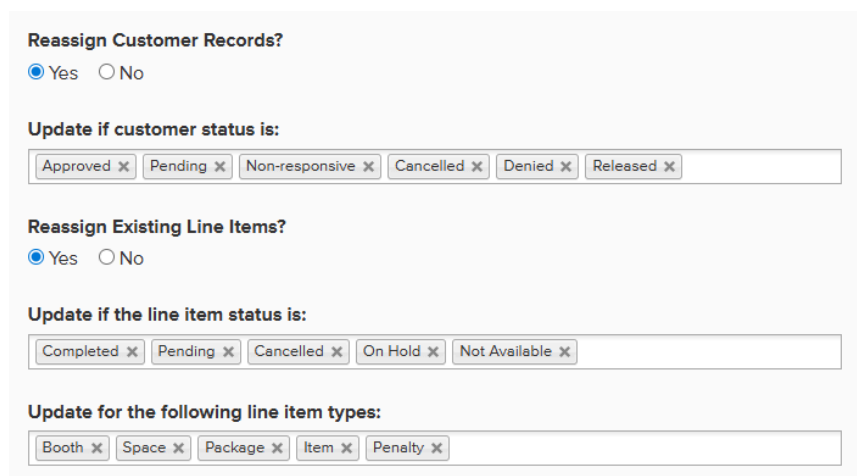


5 **New Sales Rep:** Select the name that should replace the selected sales rep.



6 Choose what to reassign:

- **Reassign Customer Records:** Replace the sales rep for all existing customer records that show the previous rep or choose specific customer statuses to limit which records are updated.
- **Reassign Existing Line Items:** Replace the sales rep for all existing line items that show the previous rep or specify an item type and/or status to limit which records are updated.
- You can select **one or both options** depending on your needs.



- 7 Click **Confirm Reassignment**. You will receive a pop-up to confirm you want to move forward with the changes. Clicking **Yes, Apply Changes** will reassign sales rep records based on the selections made in this form. *This change cannot be undone.*

