


## What If My Customer Has a Personnel Change?


Turnover happens. So does career advancement. Sometimes, your customer may inform you that Bess Buyer has been promoted or Paul Procure has left the company and should no longer have purchasing responsibilities, but Sam Shopper takes their place.

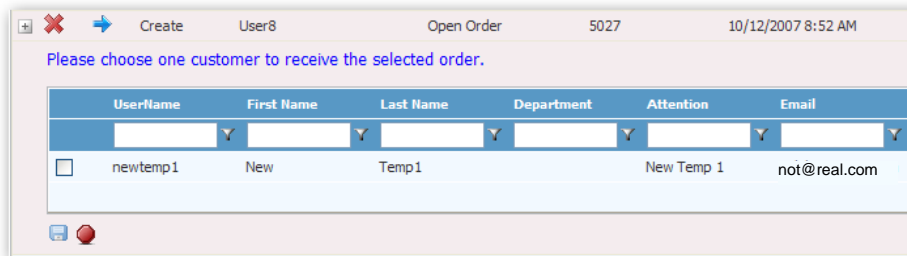
What do you do with outstanding orders in the old user's cart or approval queue? Options:


- You could simply **change the old user's name**, email address, and so on to the newly appointed one, and reset their password. That's if the new person was not already in your system. Simply use **Customer Management**, and edit the existing user record. For details, see your online help or your training handout, *Session 2: Managing Shoppers*.
- You can add the new person to the same list of approvers in **Approval Group and Approval Chain**. You may consider whether it's necessary to remove the old user, depending on the situation. For detailed instructions, see your online help or your training handout, *Session 2: Managing Shoppers*.
- You can transfer any of the old user's saved and current cart orders to the newly appointed user. Simply use **Order Management**. Instructions are below.
- You can delete any of the old user's orders. Simply use **Order Management**.

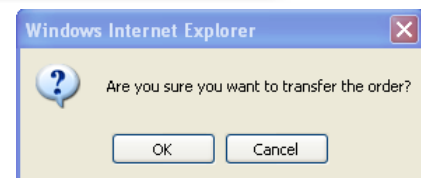
### Transferring Orders in Order Management

If an order has been added to the shopping cart and saved, you can transfer it to another user. In Order Management, a  Transfer Order icon appears next to each eligible order.

1. Log in to your **Admin Control Panel**.
2. In the left navigation menu, click **Customer Admin**, and select **Order Management**. Or, in the top navigation menu, click **Site Info** and select **Order Management**.
3. You can use search filters to limit the order list as needed.
4. For the order in question, click the  **Transfer Order** icon.
5. Select the customer to receive the selected order, by clicking the checkbox by their username as shown below. (The order may be transferred to *only one customer* belonging to the *same account*.)



6. Click the  save icon.
7. At the prompt to verify the transfer, click OK.
8. Repeat as needed until all eligible orders are transferred.



Upon verification, the order will be transferred to the new owner's "Saved Orders", whether the order was in an Open or Saved state by the initial owner. The system sends an email to the new owner notifying them of the following information:


- a) Where to find the order (Saved Orders).
- b) Who originally owned the order.
- c) A link to your shopping site.


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**Note:** This function does not currently allow you to transfer an order from one account to another. Both shoppers, the initial owner and the new owner of the orders in question, must belong to the same account.

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### *Deleting Orders in Order Management*

If an order has been added to a user's shopping cart and saved, you can delete it as needed. In Order Management, a  Delete Order icon appears next to each eligible order.

1. Log in to your Admin Control Panel.
2. In the left navigation menu, click **Customer Admin**, and select **Order Management**.  
Or, in the top navigation menu, click **Site Info** and select **Order Management**.
3. You can use search filters to limit the order list as needed.
4. For the order in question, click the  Delete Order icon.
5. At the prompt to verify deletion, click OK.
6. Repeat as needed until all eligible orders are deleted as desired.

After deleting the order, the Order Management grid refreshes, so that the order no longer appears in it, and the customer who owned that order will no longer see it in their shopping cart or approval queue.

