

Transfer Schedule Functionality

- **What is Transfer Schedule?**

Purpose:

The Transfer Schedule process allows a Key Account Manager (KAM) to delegate their responsibilities to another KAM during periods of unavailability, ensuring continuous and smooth operation.

Description:

Transfer Schedule is a mechanism through which a Key Account Manager (KAM) 'A', when unavailable, can transfer their schedule to KAM 'B' for a specified time period. This allows KAM B to manage and submit the schedule on behalf of KAM A, maintaining workflow continuity.

Requirements for Transfer Schedule:

Temporary Absence of KAM A:

When KAM A is not available for a certain period, they can transfer their schedule to KAM B.

This ensures that all tasks and responsibilities assigned to KAM A are managed and submitted by KAM B during KAM A's absence.

Partial or Full Schedule Transfer:

KAM A has the flexibility to transfer some or all of their schedules for a specific day to KAM B.

This allows KAM A to delegate only the necessary tasks while potentially retaining control over others, depending on the situation.

Use Case Examples:

Scenario 1: KAM A is on a two-week vacation. To ensure ongoing projects are not delayed, KAM A transfers all schedules to KAM B for the duration of the vacation.

Scenario 2: KAM A has a one-day offsite meeting and transfers only the schedules for that particular day to KAM B to handle client meetings and urgent tasks.

Process:

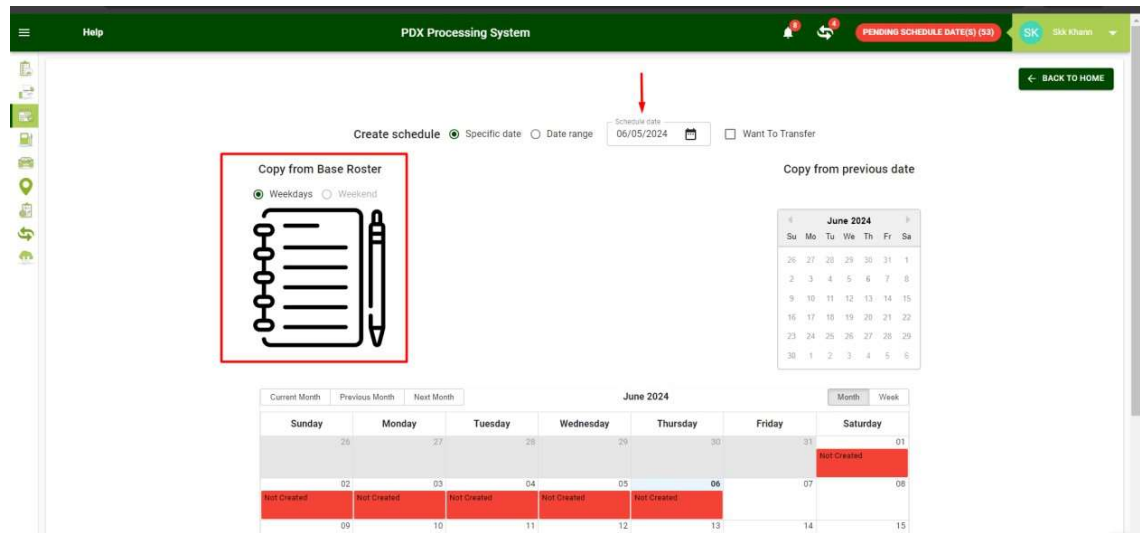
How to Initiate Transfer? :

KAM A initiates the transfer process by selecting the time period during which they will be unavailable.

KAM A specifies the tasks or schedules to be transferred to KAM B.

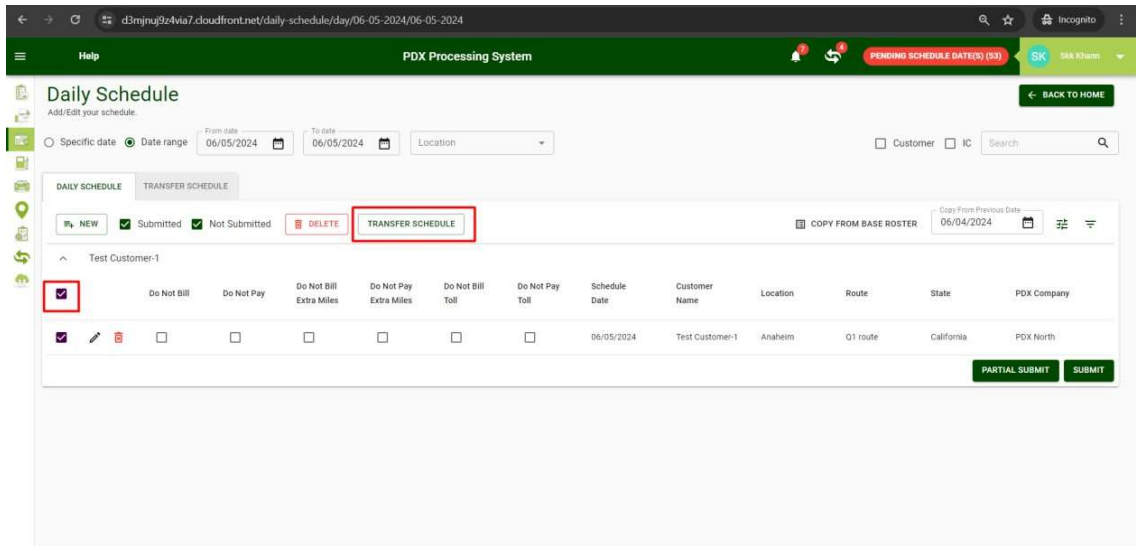
Steps 1: First, select the date for which KAM want to initiate the transfer request.

Steps 2: Create Schedule through “Copy from Base Roster” or “Copy from Previous Date” functionality.



(Image 1)

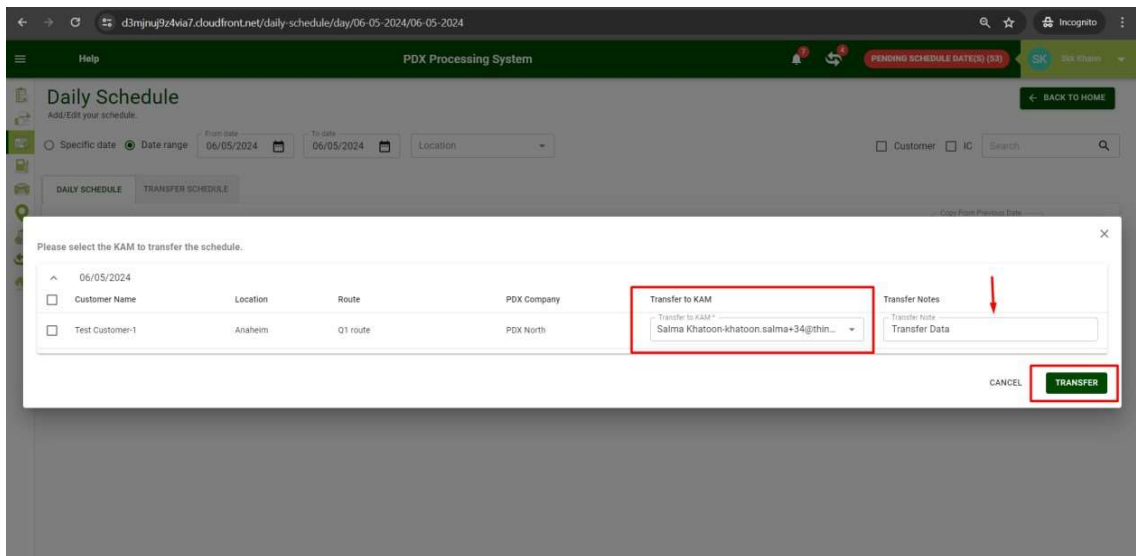
Steps 3: Select the record and click on "Transfer Schedule."



(Image 2)

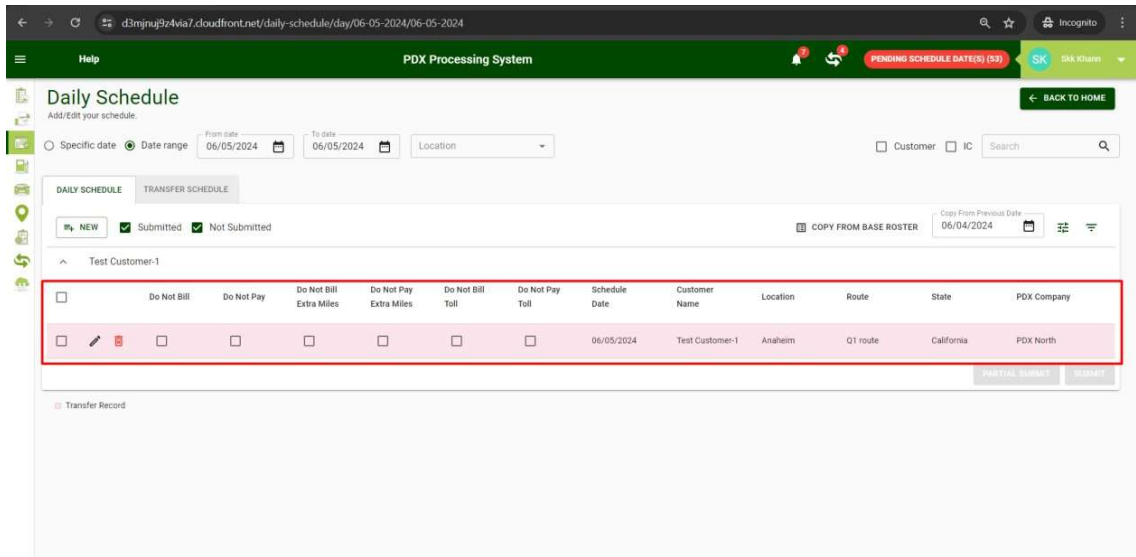
Steps 4: A popup will open where the KAM selects the Transfer to Kam (Kam to whom schedule is transferred) and adds notes (optional).

Steps 5: Click on Transfer.



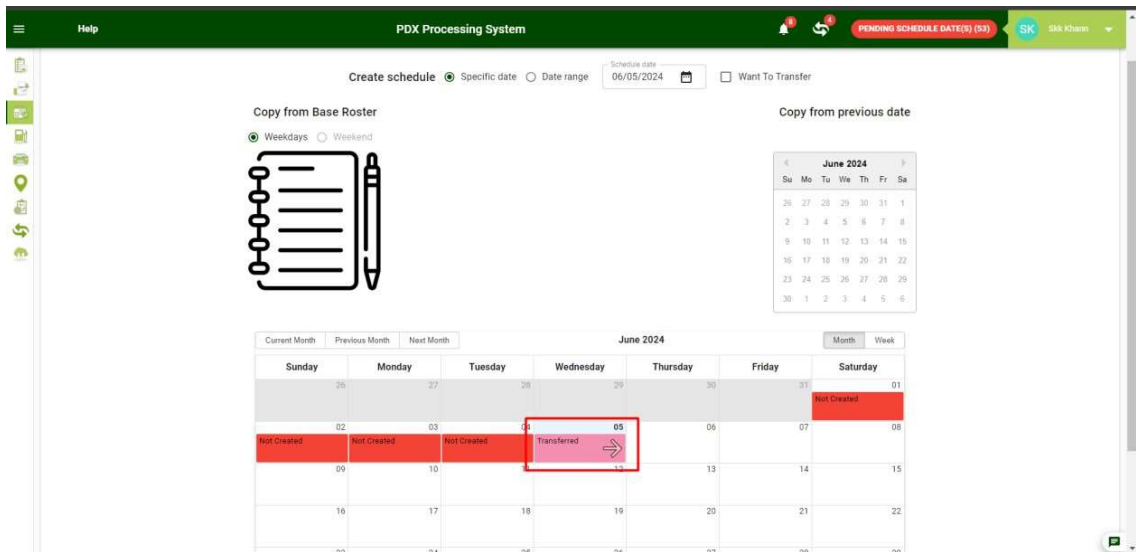
(Image 3)

Steps 6: After the transfer, the record is shown in light pink color.



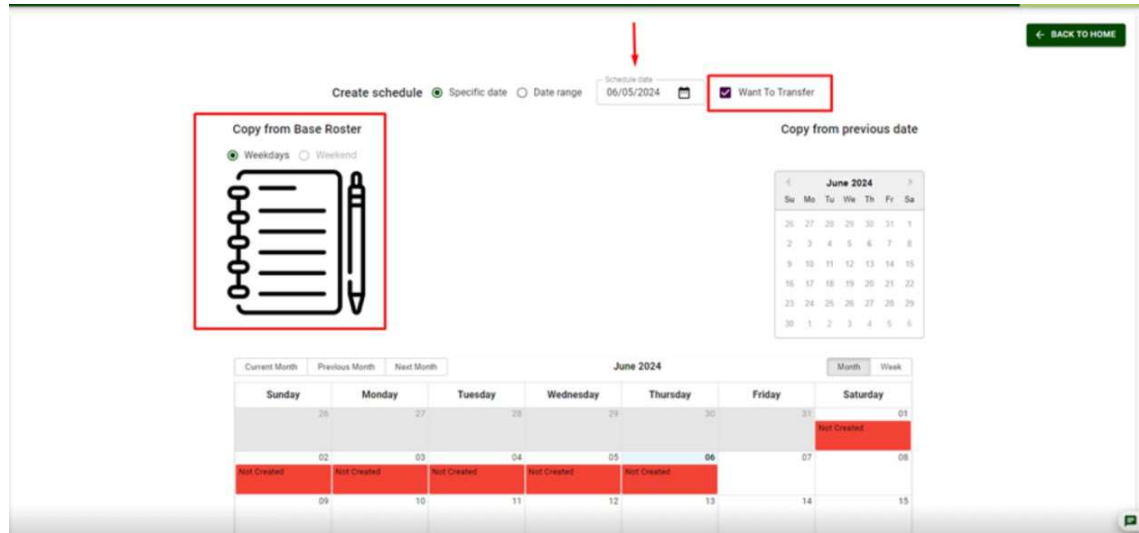
(Image 4)

Steps 7: After the transfer, the record for the selected date will be displayed as pink color in the calendar and the status appears as "Transferred."



(Image 5)

➤ Second way to Initiate the transfer Request



(Image 6)

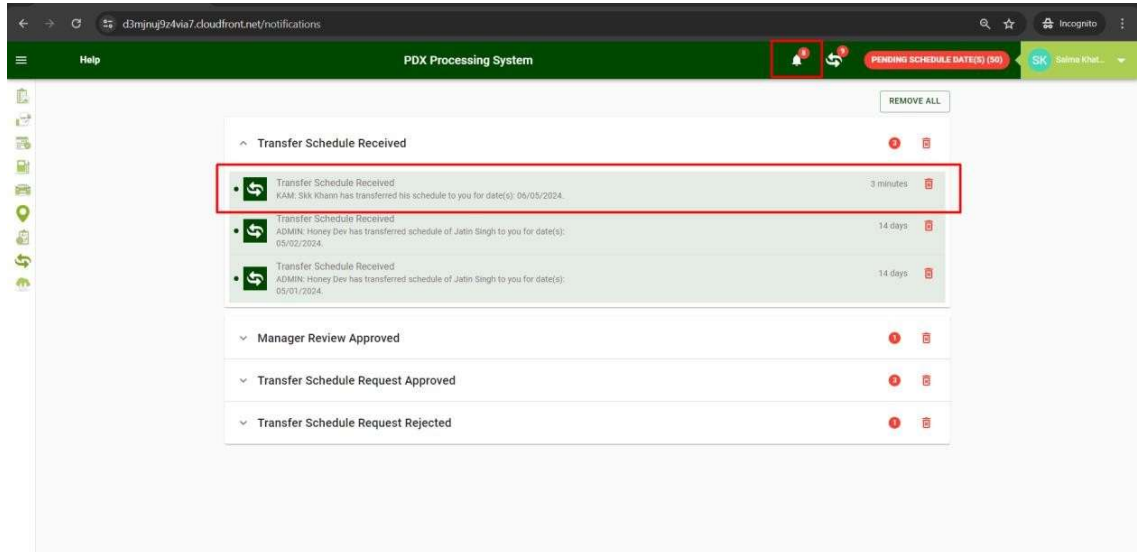
- KAM 'A' could initiate the transfer directly from 'want to transfer' option as well.
- After Date Selection, click on the 'want to transfer' option.
- Click on 'Copy from Base Roster or Copy from Previous date' option.
- Pop up that displayed in the above Image '3' will be shown from where KAM A select the 'Transfer to KAM' and can initiate the transfer.

Key Points regarding Transfer initiation:

- KAM can Transfer his schedule for the Future Dates (Only 7 days) as well.
- KAM A could transfer his schedule to one or multiple KAM's.
- If KAM A transfer his schedule to KAM B, Kam A did not able to receive any schedule from another KAM.
- KAM A will not able to create or transfer the schedule for the forced submit days.
- KAM A won't be able to transfer records to KAM B, if Kam B already marked his day as 'forced submit' for the selected transferred date.

How to accept and submit the Transfer records received from KAM A?

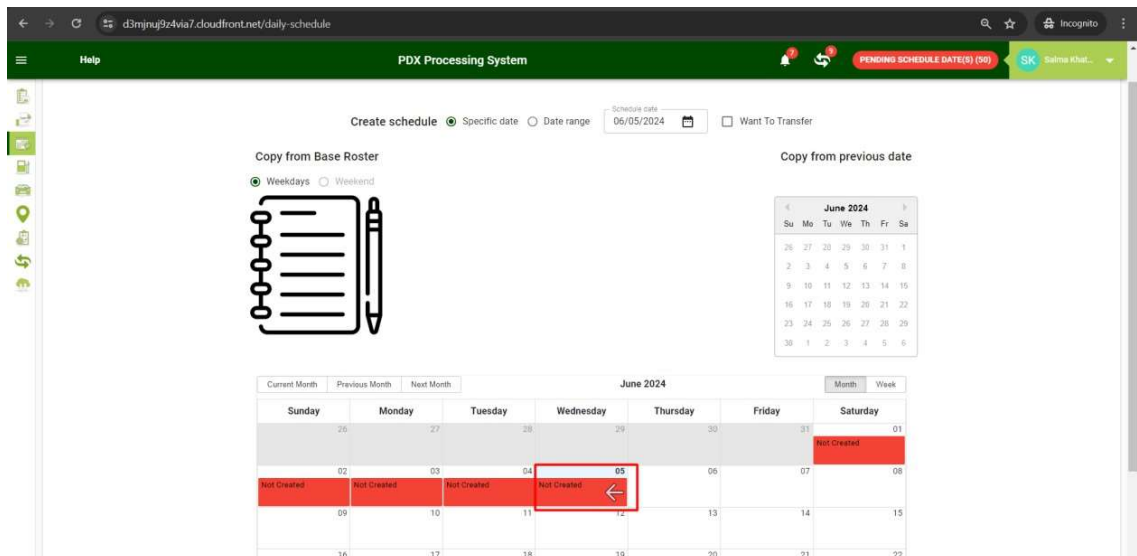
Steps 1: Click on "Notification" to see the transfer request notification.



(Image 7)

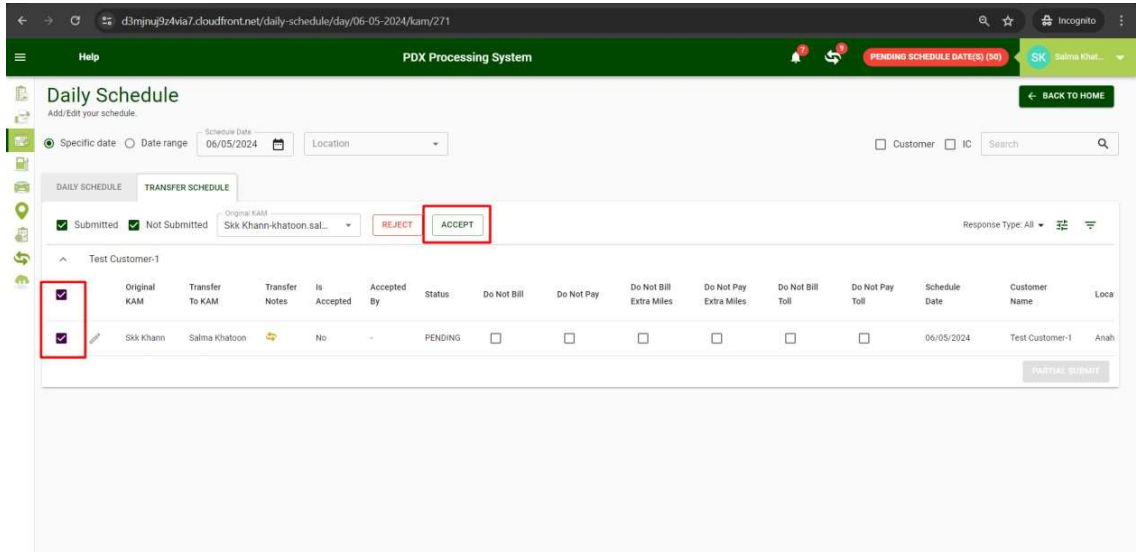
Steps 2: After viewing notification details navigate to the Daily Schedule screen, a receiving arrow will appear for the date of the transfer.

Steps 3: Double-click on the calendar for the date where the schedule was received.



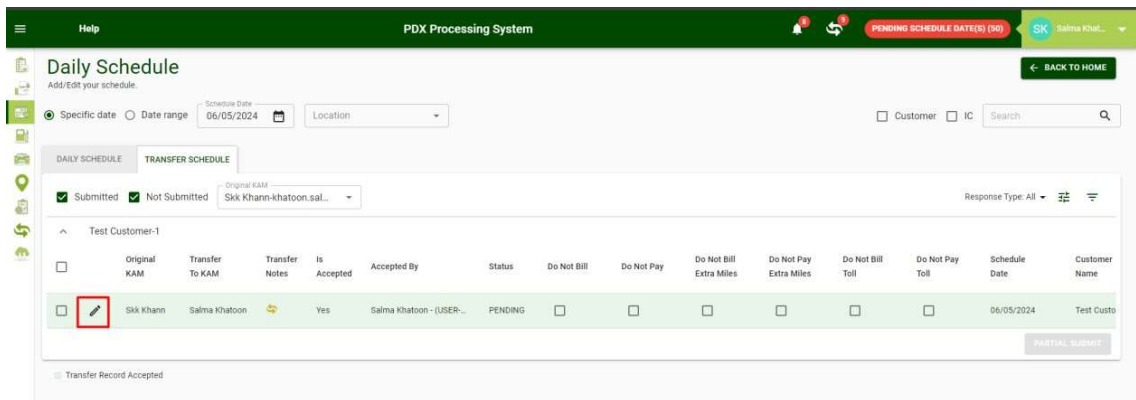
(Image 8)

Steps 4: Now, Transfer schedule screen will appear from where we can accept the records.



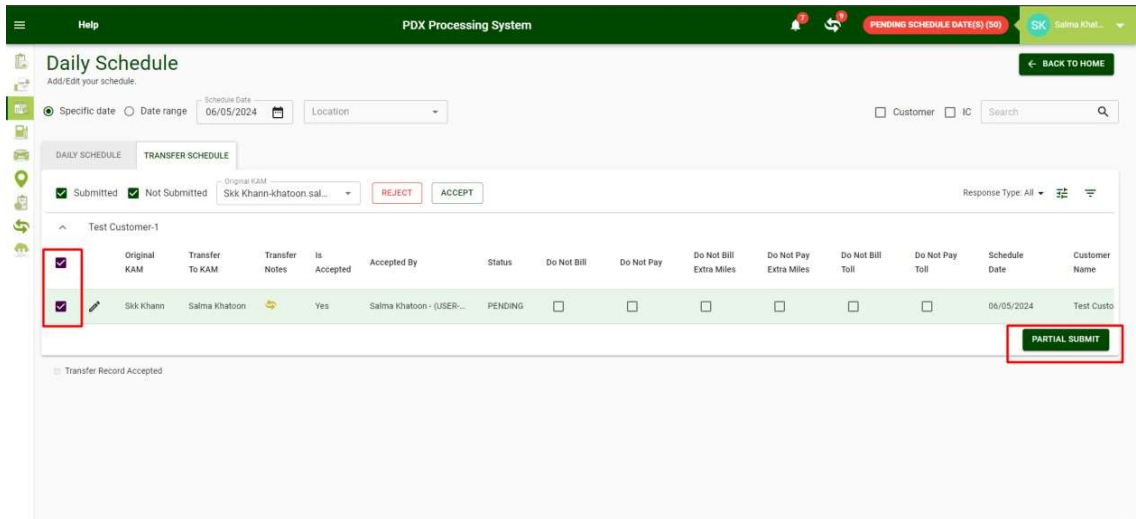
(Image 9)

Steps 5: After accepting the record, Kam B if required could edit the record received from KAM A.



(Image 10)

Steps 6: After accepting the record, KAM B can select the records and do the partial submission on the behalf of Kam 'A'.



(Image 11)

NOTE: If Kam B do the partial submission for all records received from the KAM A then the status for the KAM B will be considered as submit.

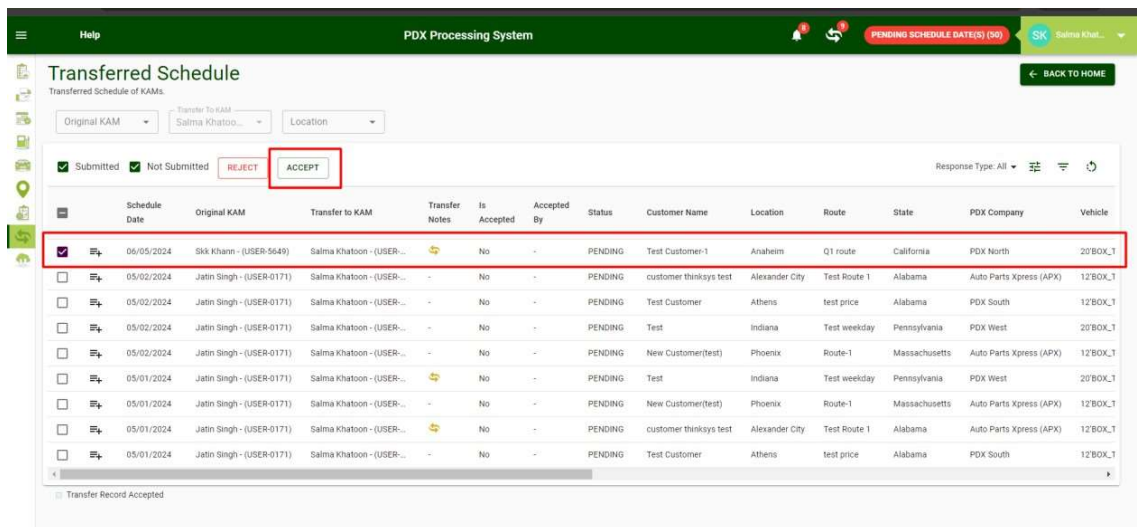
➤ Second way to initiate the transfer Request

Steps 1: Go to Home Screen and click on Transfer Schedule icon



(Image 12)

Steps 2: From Transfer Schedule Screen KAM able to see the received record and Accept the record.



(Image 13)

NOTE: Transfer Notes Highlighted in the above Image 13 depicts the Notes provided by KAM A while transferring the records to KAM B.

Steps 3: Click on highlighted plus icon (ref Img14) and Observe KAM B will be redirect to Daily schedule transfer record screen.

Transferred Schedule
Transferred Schedule of KAMs.

Original KAM: Salma Khatoo... Location: [Dropdown]

Submitted: Not Submitted: Response Type: All

<input type="checkbox"/>	Schedule Date	Original KAM	Transfer to KAM	Transfer Notes	Is Accepted	Accepted By	Status	Customer Name	Location	Route	State	PDX Company	Vehicle
<input checked="" type="checkbox"/>	06/05/2024	Skk Khann - (USER-5649)	Salma Khatoo - (USER-...)		No		PENDING	Test Customer-1	Anaheim	Q1 route	California	PDX North	20'BOX,1
<input type="checkbox"/>	05/02/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	New Customer(test)	Phoenix	Route-1	Massachusetts	Auto Parts Xpress (APX)	12'BOX,1
<input type="checkbox"/>	05/02/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	Test Customer	Athens	test price	Alabama	PDX South	12'BOX,1
<input type="checkbox"/>	05/02/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	Test	Indiana	Test weekday	Pennsylvania	PDX West	20'BOX,1
<input type="checkbox"/>	05/02/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	customer thinksys test	Alexander City	Test Route 1	Alabama	Auto Parts Xpress (APX)	12'BOX,1
<input type="checkbox"/>	05/01/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	New Customer(test)	Phoenix	Route-1	Massachusetts	Auto Parts Xpress (APX)	12'BOX,1
<input type="checkbox"/>	05/01/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	customer thinksys test	Alexander City	Test Route 1	Alabama	Auto Parts Xpress (APX)	12'BOX,1
<input type="checkbox"/>	05/01/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	Test Customer	Athens	test price	Alabama	PDX South	12'BOX,1
<input type="checkbox"/>	05/01/2024	Jatin Singh - (USER-0171)	Salma Khatoo - (USER-...)		No		PENDING	Test	Indiana	Test weekday	Pennsylvania	PDX West	20'BOX,1

Transfer Record Accepted

(Image 14)

Steps 4: After navigating to the transfer schedule tab, accept the record by selecting the check box and do the partial submission on the behalf of KAM A.

Daily Schedule
Add/Edit your schedule.

Specific date: 06/05/2024 Location: [Dropdown] Customer: [Dropdown] IC: [Dropdown] Search: [Input]

DAILY SCHEDULE | **TRANSFER SCHEDULE**

Submitted: Not Submitted: Original KAM: Skk Khann-khatoo sal... REJECT ACCEPT

Response Type: All

<input checked="" type="checkbox"/>	Original KAM	Transfer To KAM	Transfer Notes	Is Accepted	Accepted By	Status	Do Not Bill	Do Not Pay	Do Not Bill Extra Miles	Do Not Pay Extra Miles	Do Not Bill Toll	Do Not Pay Toll	Schedule Date	Customer Name
<input checked="" type="checkbox"/>	Skk Khann	Salma Khatoo		Yes	Salma Khatoo - (USER-...)	PENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	06/05/2024	Test Custo

Transfer Record Accepted

PARTIAL SUBMIT

(Image 15)

Key Points regarding Transfer Acceptance:

- KAM B will receive a notification about the transfer request.
- KAM B reviews and accepts the transferred schedule from KAM A.
- KAM B is able to reject the record with a note if KAM B is not available for that time span.
- KAM B after accepting records, can do any modification in the received records.
- KAM B won't be able to reject the transfer request once he performs the partial submission on the behalf of KAM A.

Benefits: Continuity: Ensures that the tasks and responsibilities are handled without interruption during the unavailability of KAM A.

Flexibility: Allows for the transfer of specific tasks or the entire schedule, depending on the requirements.

Collaboration: Promotes teamwork and ensures that account management responsibilities are covered at all times.