

Transfer all entries

Pressing the key combination Shift + F9 in a person's CRM window opens the following dialog:

Transfer entries

From: Member, Paul

Contact:

To:

Contact:

Date from: to:

Delete old contact person if there is no date limit and change the person in 'To' to a linked contact person

OK

Cancel

Set where the entries are to be transferred and, if necessary, restrict the date field. Then confirm with **OK**.



All entries (in the selected period) will be deleted from the original person and will be displayed to the new person instead. Only the entry for the new creation of the person and the record changes remain with the original person.

Swap project assignments or assign sub-entries to other projects

Pressing the key combination Shift + F9 in the **Project** opens the following dialog:

Projekt

Projekt VON: 17.09.19 erledigt, alles Datum

Projekt ZU: 17.09.19 erledigt, alles Datum

Projekt	VON	ZU	WERT	STATUS
17.09.19	11:50	1000	Schüler / guido.kic.	
17.09.19	11:50	8000	leer	

OK

Cancel

Now you can mark the sub-entries (tick) (1) and then assign them to another project (3) via selection (2).

