

Reassignment of users

 **Fix Me!** A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the [forum](#).

When an employee is replaced by another who takes over their missions, it is necessary:

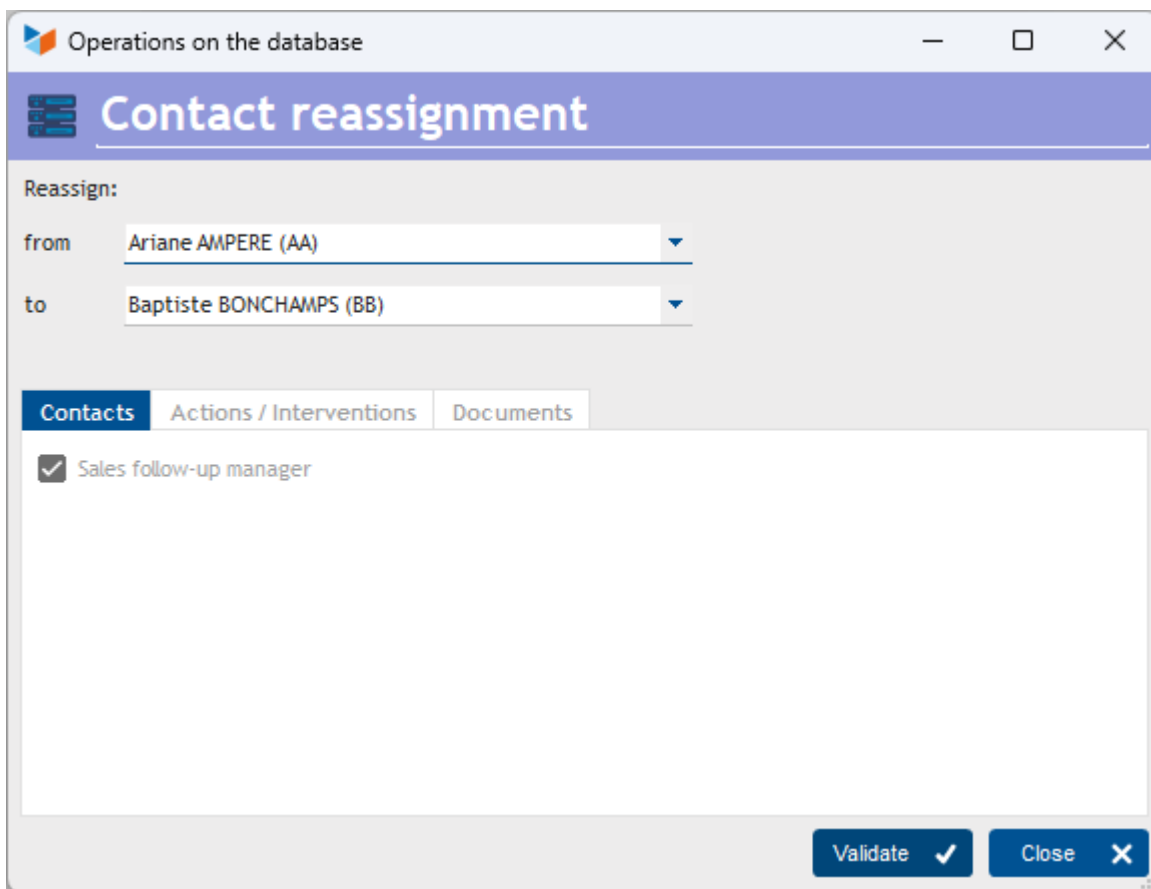
- via the [user file](#), if necessary, archive it or remove its access rights to the database;
- reassign the entities on which he was declared as active with this reassignment screen.

These entities are:

- contacts (as sales manager);
- actions and interventions (as required to carry it out);
- quotes, invoices, orders, etc. (as administrative or technical manager);
- projects (as project manager, sales manager or technical manager).

Reassigning contacts

Access: *Tools → Administration → Bulk data processing → Contacts → Reassign*



The **Validate** button will assign to all contacts whose manager is the user “**from**” to the user “**to**”.

Reassignment of actions, planned actions, interventions

Access: Tools → Administration → Bulk data processing → Actions → Reallocate (actions,inter)

The screenshot shows a web application window titled "Operations on the database". Inside, there's a section titled "Reassignment of actions/interventions". Under the heading "Reassign:", there are two dropdown menus. The "from" dropdown is set to "Ariane AMPERE (AA)" and the "to" dropdown is set to "Baptiste BONCHAMPS (BB)". Below these, there are three tabs: "Contacts", "Actions / Interventions" (which is selected), and "Documents". Under the "Actions / Interventions" tab, there's a section "To treat :" with three checkboxes: "Actions", "Planned actions", and "Interventions", all of which are currently unchecked. At the bottom right of the window, there are two buttons: "Validate" with a checkmark icon and "Close" with an 'X' icon.

The **Validate** button will assign to all actions, planned actions, or interventions, depending on the options selected, the contacts whose manager is the user **"from"** to the user ****"to" ****.

Reassignment of parts

Access: Tools → Administration → Mass data processing → Parts → Reassign

Operations on the database

Documents reassignment

Reassign:

from Ariane AMPERE (AA)

to Baptiste BONCHAMPS (BB)

Contacts Actions / Interventions Documents

Pieces : Invoices

☐ Sales follow-up manager

☐ Technical monitoring manager

Validate ✓ Close ✕

The **Validate** button will assign to all the parts whose type is selected via the **Parts** combo, the commercial or technical contacts depending on the options chosen, are the user “**from**” to user “**to**”.

Reassignment of projects

Access: Tools → Administration → Mass data processing → Projects/Consumptions → Reassign

The screenshot shows a window titled "Operations on the database" with a subtitle "Reassignment of projects". Below the title bar, there is a "Reassign:" section with two dropdown menus: "from" set to "Ariane AMPERE (AA)" and "to" set to "Baptiste BONCHAMPS (BB)". Below these are four tabs: "Contacts", "Actions / Interventions", "Documents", and "Projects" (which is selected). Under the "Projects" tab, there is a list of roles with checkboxes: "Project manager" (checked), "Sales manager" (checked), and "Technical Manager" (checked). At the bottom right, there are two buttons: "Validate" with a checkmark icon and "Close" with an 'X' icon.

The **Validate** button will assign to all projects whose operational, commercial or technical managers depending on the options chosen, are the user **“from”** to the user **“to”**.



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