

# Reassignment of users



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

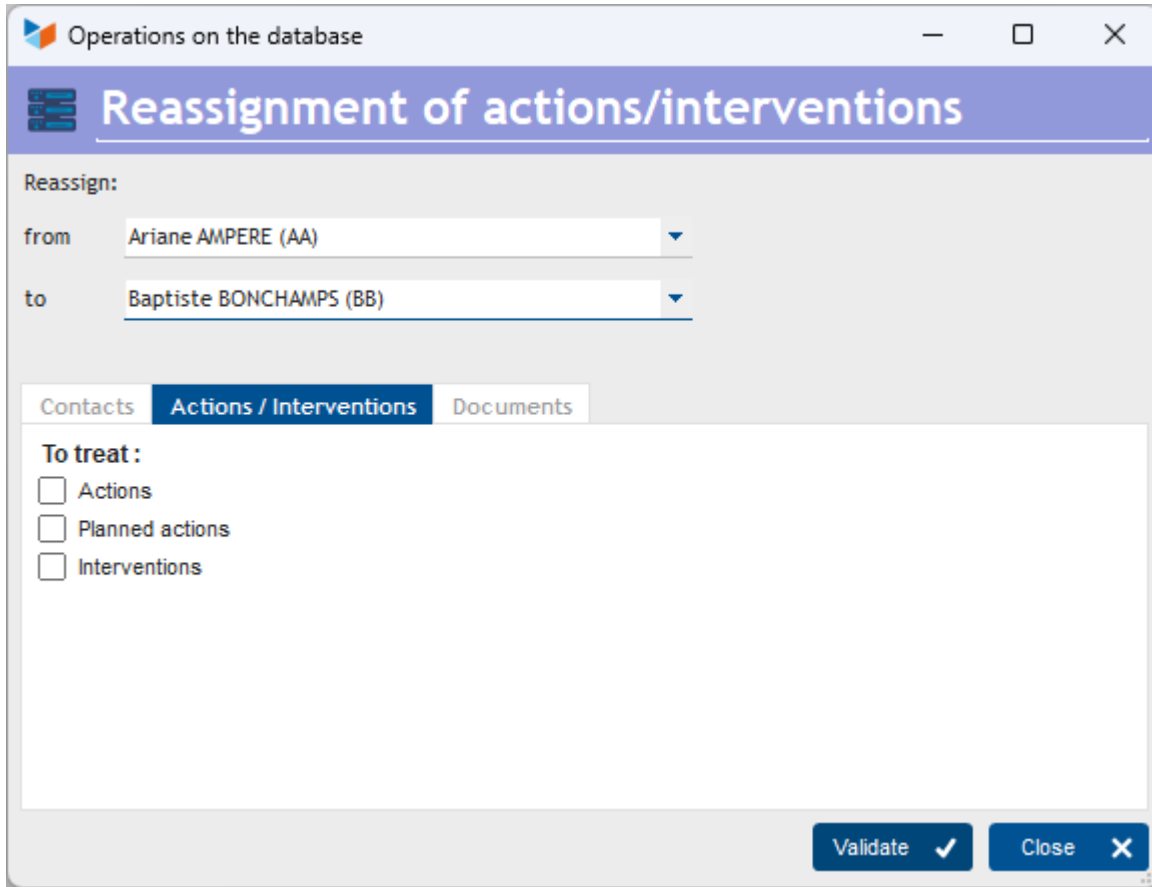
**Access:** *Tools* → *Administration* → *Bulk data processing* → *Contacts* → *Reassign*

A screenshot of a software window titled "Operations on the database" with a subtitle "Contact reassignment". The window has a light blue header and a white body. Under "Reassign:", there are two dropdown menus: "from" set to "Ariane AMPERE (AA)" and "to" set to "Baptiste BONCHAMPS (BB)". Below these are three tabs: "Contacts" (selected), "Actions / Interventions", and "Documents". Under the "Contacts" tab, there is a list with one item: "Sales follow-up manager" with a checked checkbox. 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 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 **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*

Operations on the database

## Reassignment of projects

Reassign:

from Ariane AMPERE (AA)

to Baptiste BONCHAMPS (BB)

Contacts Actions / Interventions Documents **Projects**

- Project manager
- Sales manager
- Technical Manager

Validate ✓ Close ✕

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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Last update: **2025/06/24 21:16**