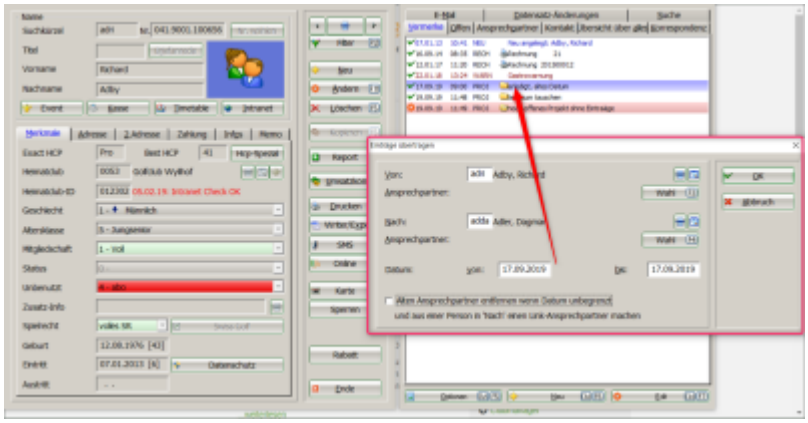
Transfer all entries or individual projects in CRM

By pressing the key combination Shift + F9 in the **CRM window** of a person opens the following dialogue:

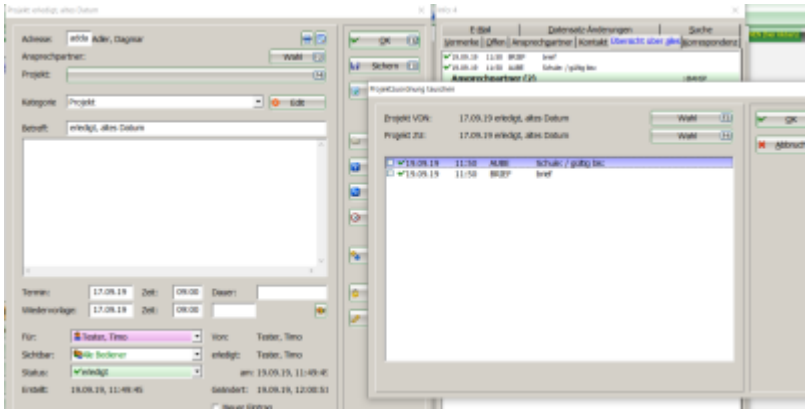


Determine where the entries should be transferred to and restrict the date field if necessary. Then confirm with ***OK.***

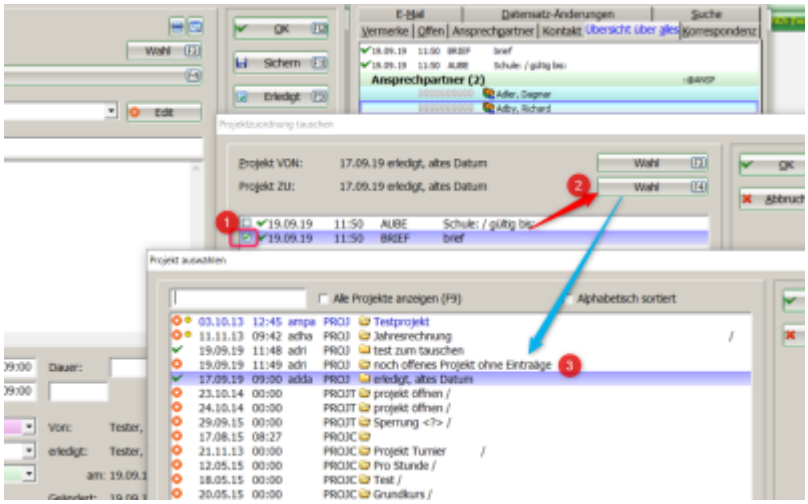
All entries (in the selected period) are deleted from the original person and appear in the new person instead. Only the entry for creating the new person and the data record changes remain with the original person.

Swap project assignment or assign sub-entries to other projects

By pressing the key combination shift + F9 in the **project**the following dialogue opens:



Now I can select the subentries (tick the box) (1) and then assign them to another project (3) via Selection (2)


Projekt VON:
17.09.19 erledigt, altes Datum
Projekt ZU:
17.09.19 erledigt, altes Datum
Wahl
Ansprechpartner (2)
Alle Projekte anzeigen (F9)
Alphabetisch sortiert
Testprojekt
Jahresrechnung
test zum tauschen
noch offenes Projekt ohne Eintraege
erledigt, altes Datum
1
2
3