

User Data Transfer

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Pathway: *Database > User Data Transfer*

The User Data Transfer tool facilitates the bulk transfer of user data items from one user account to another. For example, in the event an employee leaves, it allows for the seamless transfer of all assigned accounts to another user for continued management.

USER DATA TRANSFER

DATABASE > USER DATA TRANSFER

SOURCE

DESTINATION

ACCOUNTS

SITES

OPEN PROPOSALS

OPEN TASKS

OPEN APPOINTMENTS

ACCOUNT REQUESTS

CANCELLATION REQUESTS

TRANSFER

Permissions

The following permission is required to process a data transfer to another user:

Permission ID	Permission Name
394	User Data Transfer

Field Descriptions

Field	Description
Source	The user account data is being transferred from.
(Destination) Accounts	Transfers customer accounts from one user account to another.
(Destination) Sites	Transfers site management from one user account to another.
(Destination) Open Proposals	Transfers any open proposals assigned to the source user account to the destination user account.

(Destination) Open Tasks	Transfers any open tasks assigned to the source user account to the destination user account.
(Destination) Open Appointments	Transfers any open appointments assigned to the source user account to the destination user account.
(Destination) Account Requests	Transfers any account requests assigned to the source user account to the destination user account.
(Destination) Cancellation Requests	Transfers any cancellation requests assigned to the source user account to the destination user account.

Process a Transfer

1. Select the **Source** user account reassignment items will be transferred from.
 2. Select the **User** from the desired database field to transfer the data to.
 3. Click **Transfer** when finished.
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