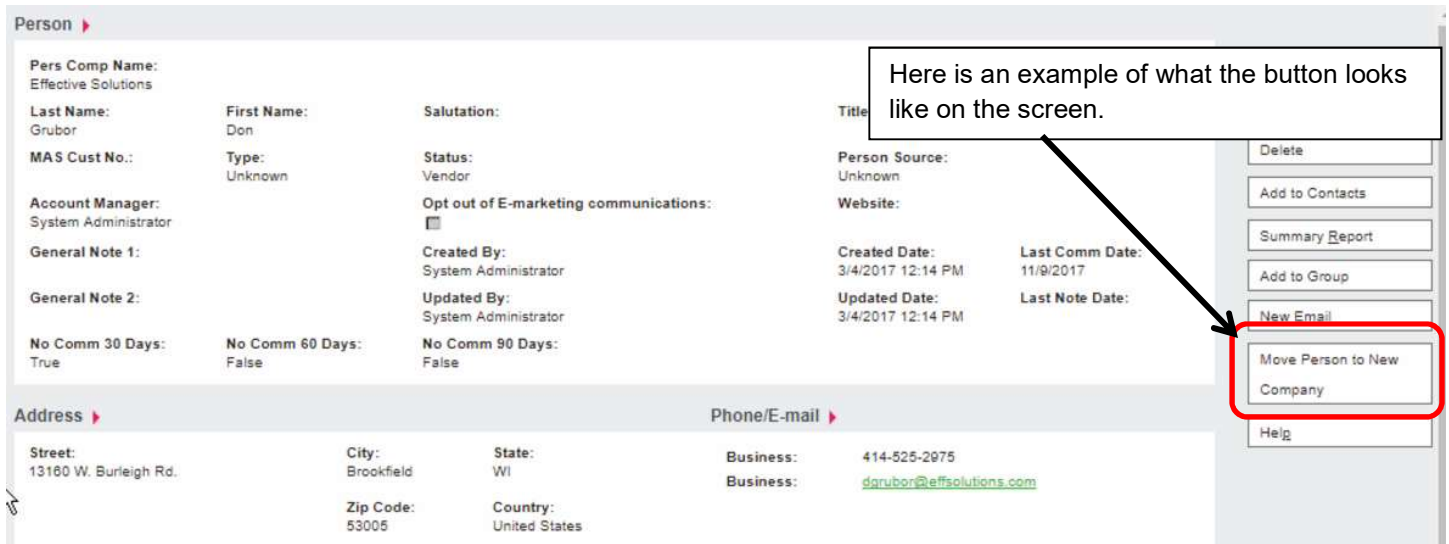


SageCRM Enhancement: Move Person to New Company Button

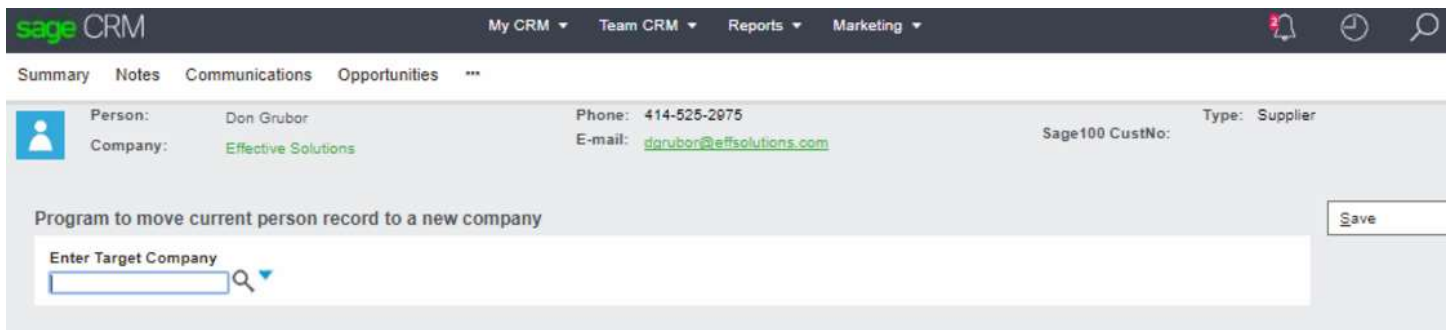
There are situations where you may want to move a person from one company in SageCRM to another company.

- Person was entered in under the wrong company initially
- Person was incorrectly assigned during an import or data migration
- Person moved to a new company and you want all of the corresponding data to move with them

Effective Solutions has developed scripts and can add a Move Person to New Company button to your SageCRM system to let you move person records to a new company in CRM. Here is how it works.



When you click on the button, you get a screen that prompts you to enter in the Company name of the record you want to move the person to.



From this screen, type in all or part of the company name, hit the Magnifying glass to search CRM and select the proper company, and then hit SAVE to move the person to the new company in CRM.

The price to implement this enhancement is \$700