Projecis

Get your team on the same page.

The complete project management software solution.

Transferring Ownership of a Subscription

Due to personnel or organizational changes there may be a desire to transfer the ownership of a subscription to someone else. This person may be within the same company as the original owner or another company.

Transferring a Subscription

Steps:

- Sign into Projecis
- Select the Subscriptions Tab on the right side of the blue bar (Fig 1)
- > If there is more than one subscription, select the subscription to transfer
- Select the "Transfer Subscription" option in the Actions box (Fig 2)
- Select the 'New Owner" from the pull down options (Fig 3) and save the change.
- Note: You can only transfer ownership of a subscription to another Administrator (Full or Project level) on the subscription. If the person you wish to transfer ownership to is not in the pull down list, they are probably not an Administrator. See: Changing Subscription Level Permissions

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Fig 2



Fig 3

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	Next Bill Date: Wed Dec 30, 2099	O Greedo Rodian	
		Filter associates	
		Show offline associates	
		Available	

Changing Subscription Level Permissions

Steps:

- Sign into Projecis
- Select your name in the upper right hand side
- Select "Manage Projects and Members"
- If there is more than one subscription, select the subscription to manage
- Select the "People" tab
- > Select the person you wish to edit their subscription level permission
- Select "Edit Member" in the Actions box (Fig 4)
- Select the appropriate Subscription Level permissions and save changes (Fig 5)

Fig 4



Fig 5

<u>Workspaces</u> / Skywalker Industries	
Workspace Projects Companies People	
Browse People Search	Add Person
Edit Member: Artoo Detoo company Skywalker Industries Access Level Administrator Member Restricted Full Project	 Complete this form to edit this person. They will take up a seat as long as they are a member in the workspace. Administrators can view the Workspace Management area for this subscription. Full administrators can manage projects, companies and people (both contacts and members); project administrators can manage projects, companies and contacts only (not add / remove members).
No Yes Save Changes Can	Artoo Detoo Skywalker Industries