

Transferring Users Between Accounts Within the Same Company

The ability to transfer users to different accounts enables you to manage your accounts more effectively. Once you transfer users to a different account, the source account will no longer be charged for the user and the destination account will be billed accordingly. Only ProjectTalk users with a Master Corporate Administrator or an Account Administration permission are able to transfer users between accounts.

To transfer users between accounts

1. On the **My ProjectTalk** page, under the **Administration** section and click **Administer** next to **Account Administration**.
2. The **Account Summary** page opens and displays a brief summary of all the accounts.
3. From the **Account** list, select the account that contains the user you want to transfer.
4. The employees and sponsored users from this account are listed in the table below it. Sponsored users are identified by an asterisk (*) at the end of their names.

Note: ProjectTalk displays the user's first and last names in the table. If the user did not enter their first and last names in their profile, it will not be displayed in this table. To resolve this, simply enter their first and last names by editing their profile. To edit the user's profile, go to the Account Details page and click on the user's name.

5. Select the user you want to transfer.
6. To select more than one user, hold the CTRL or SHIFT key and click on the users.
– or –
7. To transfer all the users in this account, select the **Select All** check box.
8. From the **Account 2** list, select the account to which you want to transfer the selected users.
9. Click **Transfer ->** to transfer the selected users to the new account.
10. The selected users appear in Account 2.
11. If you add a user to a full account, ProjectTalk prompts you to choose another account.
12. If you want to remove a user from Account 2, select the user and then click **<- Transfer**.
13. The user is transferred back to Account 1.
14. Click **Done**.
15. The changes are saved.