3.12 Transfer Relations

This action allows to transfer/copy related entities from one entity to another in the process.
In the case of relationship 1 - N records will be transferred, while in the case of relationship N - N records will be copied.
This action is useful in entity conversion flows where the original entity is converted to another and therefore all entities related to the old one can be transferred/copied into the new one. (Figure 1)
Ex. In a process of conversion from lead to contact/company all the entities that were linked to the old lead can be transferred/copied to the new contact/company.
Finally you can delete the lead without losing therefore all the actions that were connected to it.

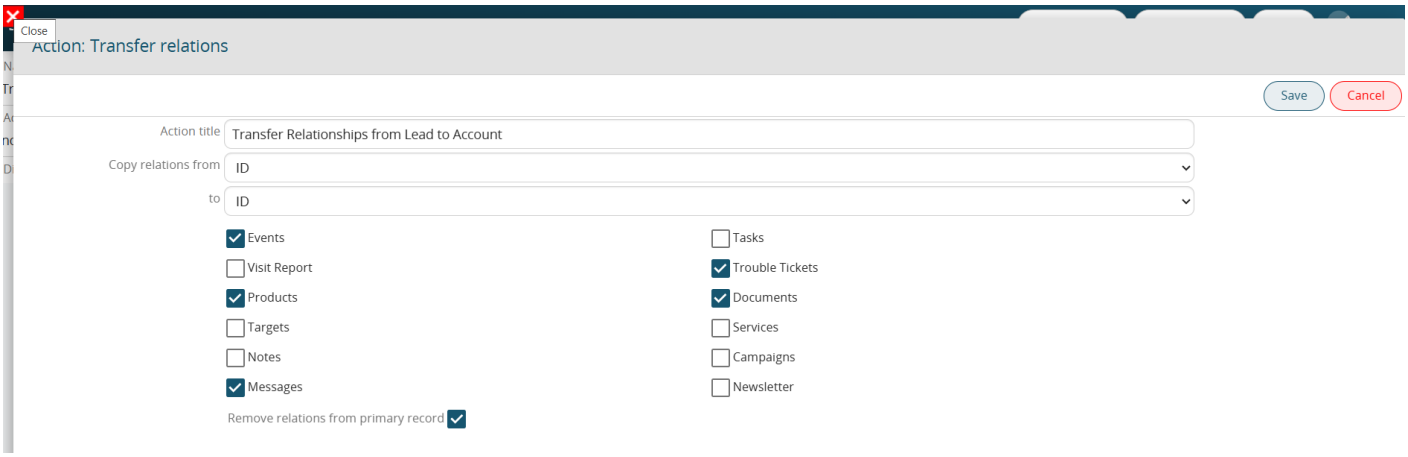


Figure 1

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