

MASS TRANSFER AND RE-ASSIGN OPPORTUNITY

Business Challenge

- In a dynamic org often need to reassign opportunity records from one representative to another representative .
- In a dynamic often need to Mass Transfer records from one representative to another.

Approach

- Reassign opportunity model are utilized to perform assigning the single or multiple records from one user to another user based on the user requirement.
- Mass Transfer model are utilized to perform Transfer the bulk records from one user to another user by admin.

Outcome

- Easy to transfer records.
- Time Saving.
- With a few mouse clicks, admin and user can perform Reassign opportunity and Mass Transfer of records.

Process Enhancements And Benefits

- Whenever Admin/User transfers the records the Email notification will be sent to the user.
- Email alert will benefits the user to identify who has transferred the records and how many records and which records get transferred to that user.
- In Reassign Opportunity model,Implemented search component to easily search the record by Opportunity Name.
- In Reassign Opportunity model,Implemented sorting for Stage field which will benefits the user to see only that particular opportunity stage records.

Reassign Opportunity And Mass Transfer Flow Diagrams

