

Mass Transfer And Reassign Opportunity User Manual

Version 1.0

26/APR/2023

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1. Introduction

Salesforce is a powerful platform that helps organizations streamline their sales, marketing, and customer service processes.

Our new project goal to enhance these capabilities by leveraging the latest features and functionalities of Salesforce. We believe that this project can benefit your organization as well, by providing you with better insights into your customer data, improving your sales pipeline management, and increasing your team's productivity.

1.1 Overview

The goal of the project is to transfer bulk records of any object in Salesforce from one user to another user within the organization based on their profile and permission sets, allowing admin/user can be able to transfer the records based on the need.

The project will require the development of graphical user interface to enable functionality for mass transfer of records or reassign the opportunity records. This new feature will be helpful for Admin/Users with authorized access to mass transfer the records or reassign opportunities.

2. Getting Started

Mass Transfer: (Available for all objects)

- From an salesforce org, the admin selects 'From' user and 'To' user from the list.
- Admin should be able to select the object from picklist.
- Admin should be able to transfer the records only when From user and To user have same access permission on that particular object.
- Admin shall able to transfer the bulk records to other user through transfer button.

Reassign Opportunity: (Available for opportunity object)

- Admin should be able to find data-table to selects the opportunity records.
- Admin should be able to select the user from the list.
- Admin should be able to transfer the records only when selected user have access permission on opportunity object.
- Admin shall able to transfer the records to other user through transfer button.

2.1 Cautions & Warnings

Salesforce User registration or Salesforce User Sign-in credential require installing this package.

2.2 Installation

Click on this link below and install the package.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5g000000ALcf>

 **Install Re-Assign Opportunity & Mass Transfer**
By netfortune


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**

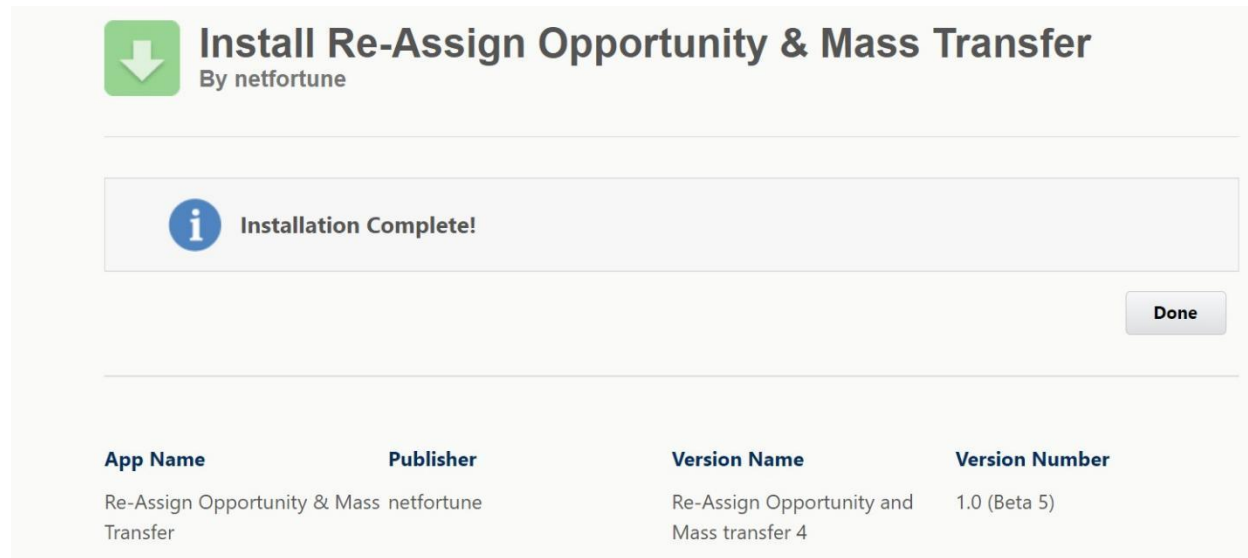
 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. 

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

Select Install for Admin only and click on install.



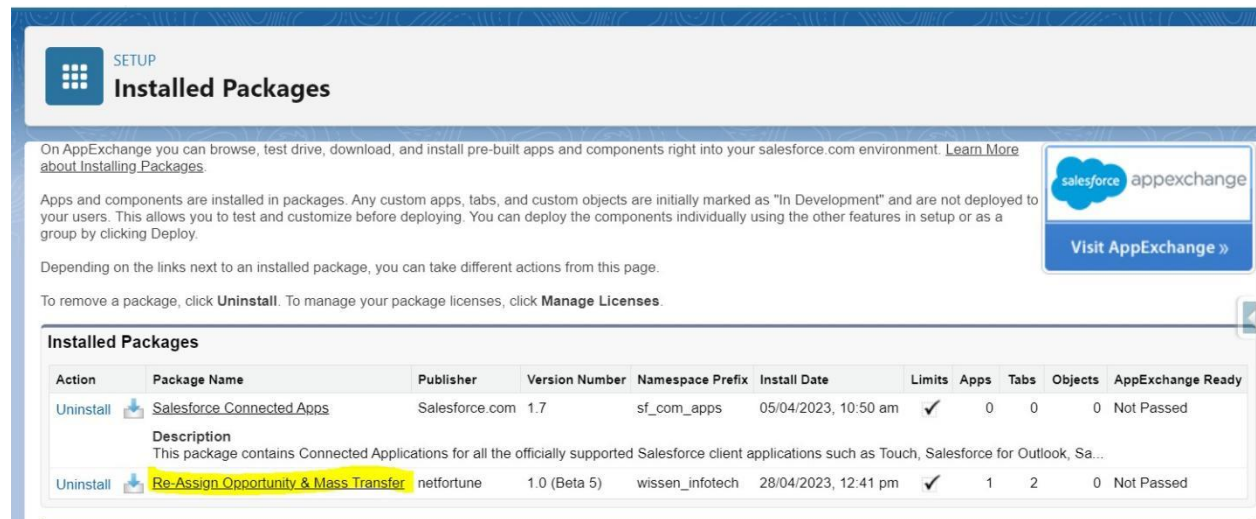
Install Re-Assign Opportunity & Mass Transfer
By netfortune

Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Re-Assign Opportunity & Mass Transfer	netfortune	Re-Assign Opportunity and Mass transfer 4	1.0 (Beta 5)

After installing the package, you can see the package with the name (Re-Assign Opportunity & Mass Transfer) in Salesforce org. as shown below:



Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	05/04/2023, 10:50 am	✓	0	0	0	Not Passed
Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...										
Uninstall	Re-Assign Opportunity & Mass Transfer	netfortune	1.0 (Beta 5)	wissen_infotech	28/04/2023, 12:41 pm	✓	1	2	0	Not Passed

2.3 User Access Considerations

- Opportunity records need to exist in the organization to transfer the records.

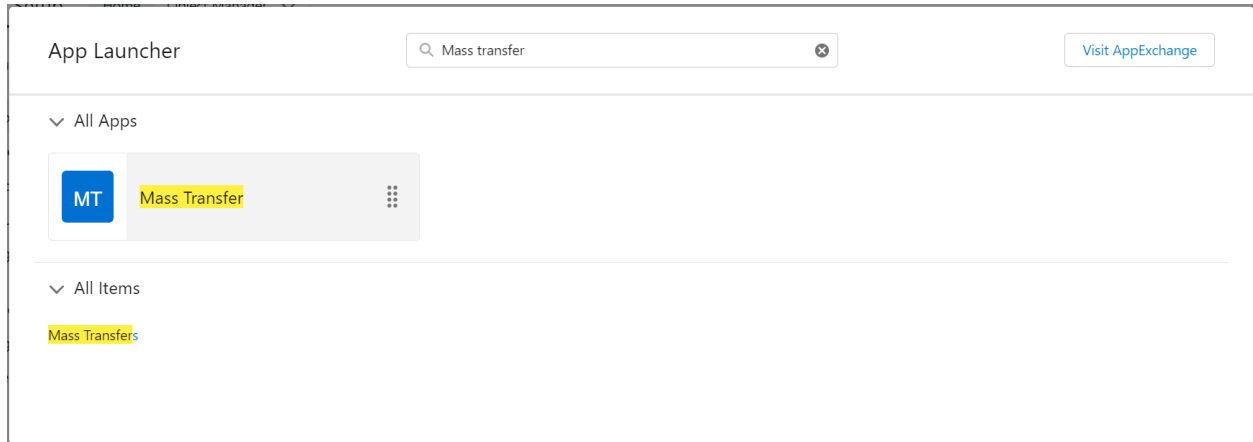
2.4 Accessing the System

Salesforce account is mandatory for all admins to see the records transferred in Org.

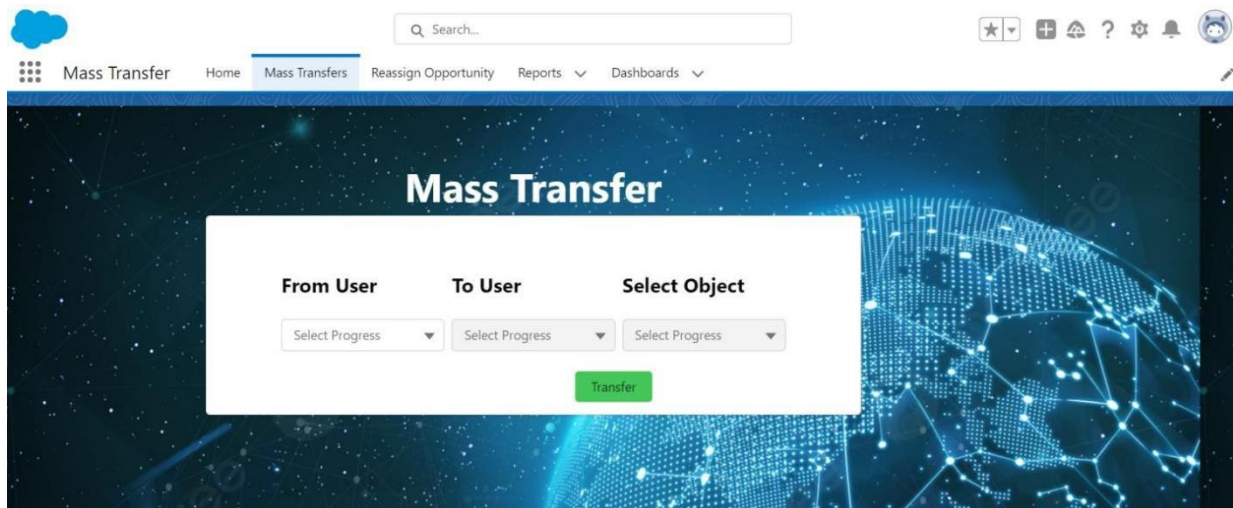
2.5 System Organization & Navigation

Mass Transfer Navigation:

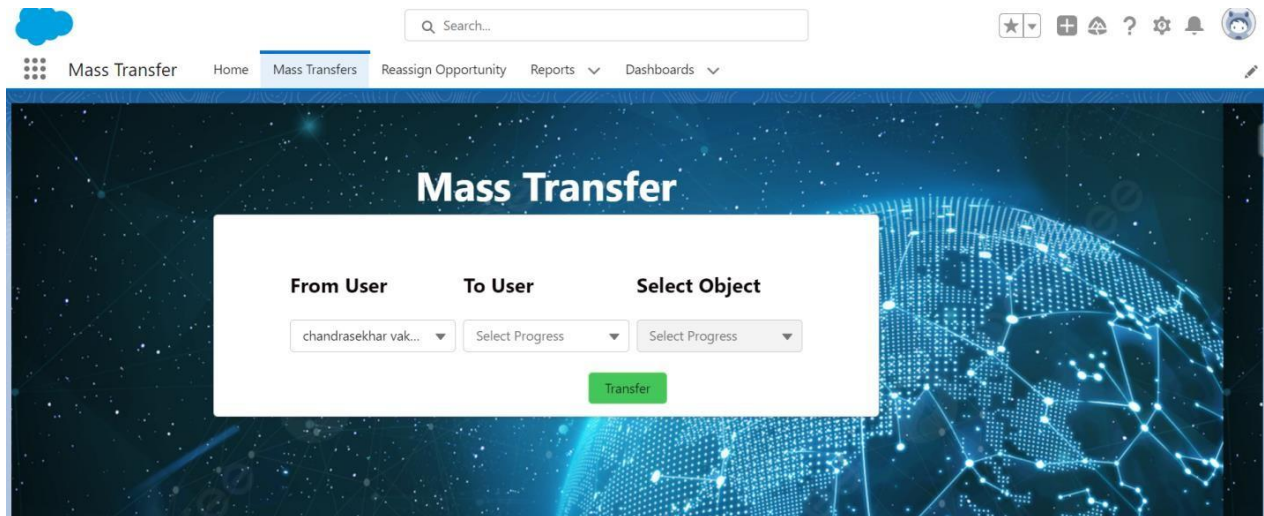
- From App Launcher search for Mass Transfer Application and Click on it.



- Click on Mass Transfer Tab

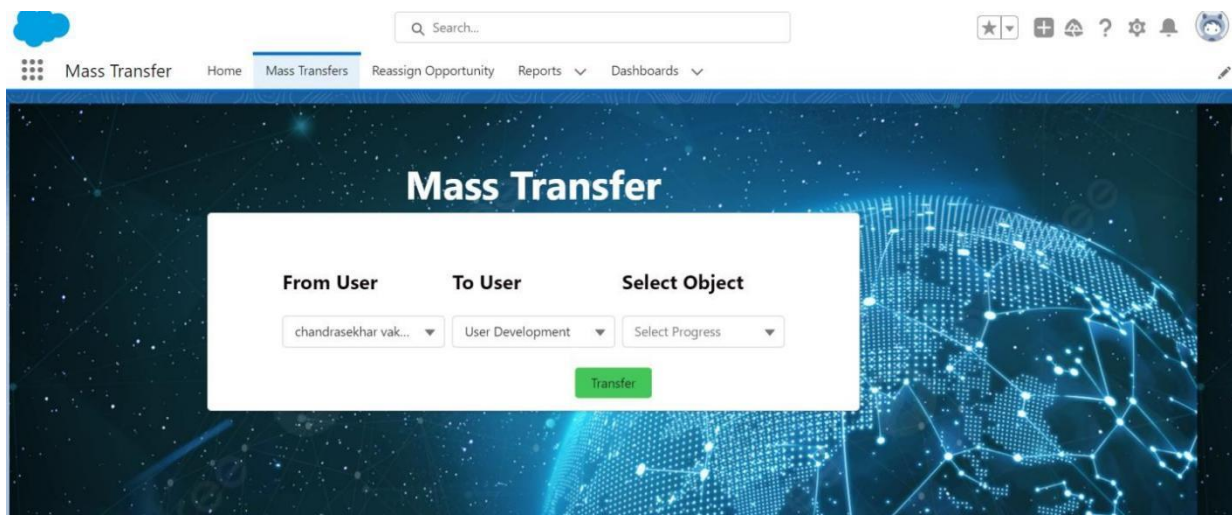


- Select the user from 'From User' option . After selecting the 'From User' the 'To User' option will gets enabled.



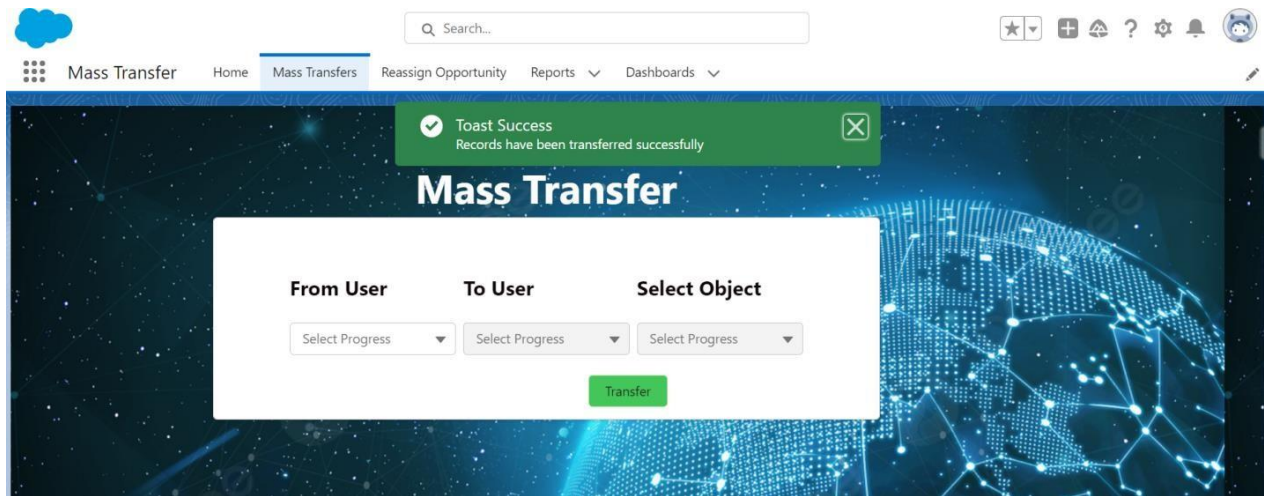
The screenshot shows the 'Mass Transfer' interface. The 'From User' dropdown is selected with the value 'chandrashkar vak...'. The 'To User' and 'Select Object' dropdowns are currently disabled and show 'Select Progress'. A green 'Transfer' button is visible below the dropdowns. The background features a blue digital network pattern.

- Select the user from 'To User' option . After selecting the 'To User' the 'Select Object' option will gets enabled.



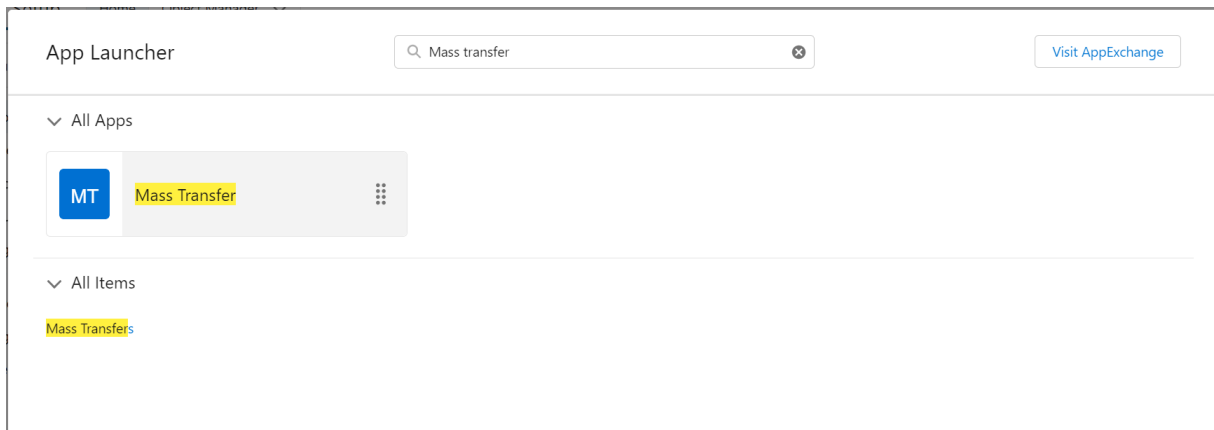
The screenshot shows the 'Mass Transfer' interface. The 'From User' dropdown remains selected with 'chandrashkar vak...'. The 'To User' dropdown is now selected with the value 'User Development', and the 'Select Object' dropdown is enabled and shows 'Select Progress'. The green 'Transfer' button remains visible. The background features a blue digital network pattern.

- Select 'Object' from the list and Click on Transfer option. The records will be transferred and Toast message will be displayed. 'To User' and 'Select Object' options will get disabled.



Reassign Opportunity Navigation:

- From App Launcher search for Mass Transfer Application and Click on it.



- Click on Reassign Opportunity Tab

The screenshot shows the 'Reassign Opportunity' page within the 'Mass Transfer' module. The page has a dark blue header with a search bar and navigation icons. Below the header, there's a breadcrumb trail: 'Mass Transfer > Home > Mass Transfers > Reassign Opportunity > Reports > Dashboards'. The main content area has a purple background with the title 'Reassign Opportunity' and a sub-header 'Users'. There are three buttons: 'Proceed' (blue), 'Select an Option' (white with a dropdown arrow), and 'Transfer' (grey). Below these buttons is a table with columns: Name, Stage, Close Date, and LeadSource. The table contains seven rows of data, all with 'Closed Lost' as the stage. The 'LeadSource' column is empty for the first six rows and contains 'Partner Referral' for the last row.

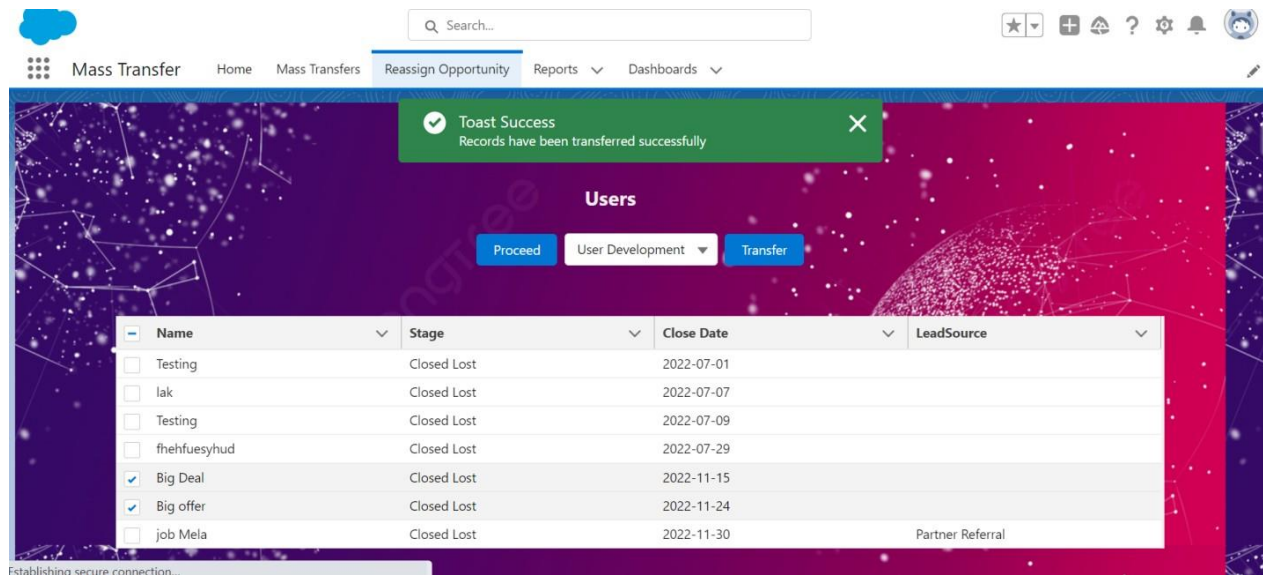
Name	Stage	Close Date	LeadSource
Testing	Closed Lost	2022-07-01	
lak	Closed Lost	2022-07-07	
Testing	Closed Lost	2022-07-09	
fhehfuesyhud	Closed Lost	2022-07-29	
Big Deal	Closed Lost	2022-11-15	
Big offer	Closed Lost	2022-11-24	
job Mela	Closed Lost	2022-11-30	Partner Referral

- Select the one/more records which you want to transfer from the data-table and Click on Proceed button and shows the success toast message.

This screenshot shows the same 'Reassign Opportunity' page as the previous one, but with a green toast message at the top: 'Toast Success Records have been selected successfully'. In the table, the 'Big Deal' and 'Big offer' rows are now selected, indicated by blue checkmarks in the first column. The 'Proceed' button is still visible, and the 'Transfer' button is now disabled (greyed out).

Name	Stage	Close Date	LeadSource
Testing	Closed Lost	2022-07-01	
lak	Closed Lost	2022-07-07	
Testing	Closed Lost	2022-07-09	
fhehfuesyhud	Closed Lost	2022-07-29	
Big Deal	Closed Lost	2022-11-15	
Big offer	Closed Lost	2022-11-24	
job Mela	Closed Lost	2022-11-30	Partner Referral

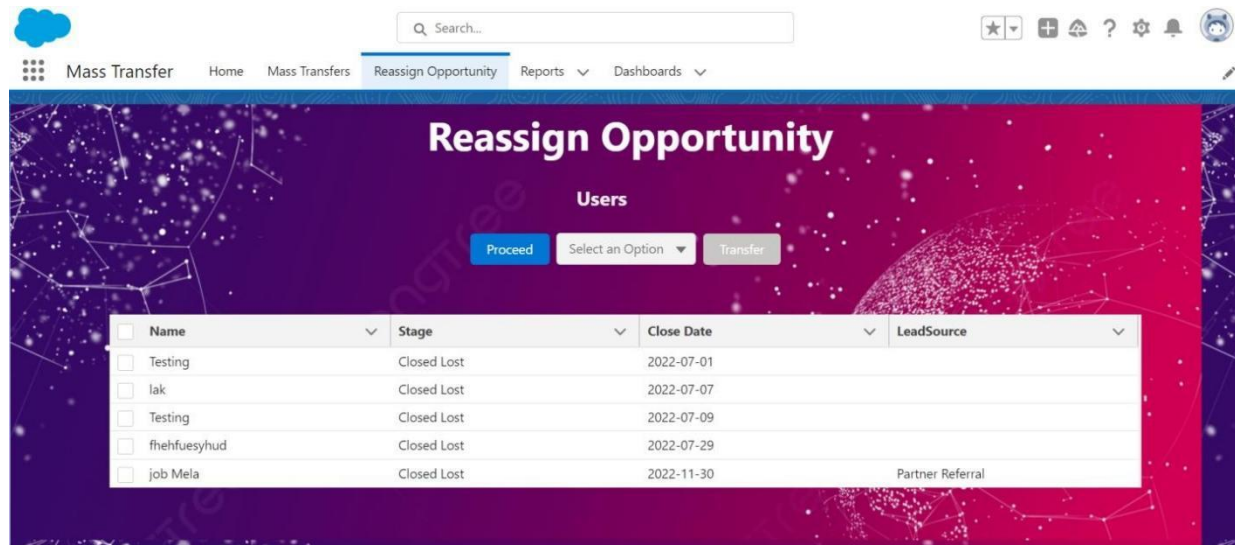
- Select User from the 'Users' list and Click on Transfer button. Displays the success toast message after records get transferred.



The screenshot shows the 'Reassign Opportunity' page with a success toast message: 'Toast Success Records have been transferred successfully'. Below the toast, the 'Users' section displays a table with columns: Name, Stage, Close Date, and LeadSource. The table contains six rows of data, with 'Big Deal' and 'Big offer' selected.

Name	Stage	Close Date	LeadSource
☐ Testing	Closed Lost	2022-07-01	
☐ lak	Closed Lost	2022-07-07	
☐ Testing	Closed Lost	2022-07-09	
☐ fhehfuesyhud	Closed Lost	2022-07-29	
☒ Big Deal	Closed Lost	2022-11-15	
☒ Big offer	Closed Lost	2022-11-24	
☐ job Mela	Closed Lost	2022-11-30	Partner Referral

- Page will get refreshed automatically and displays remaining records in data-table.

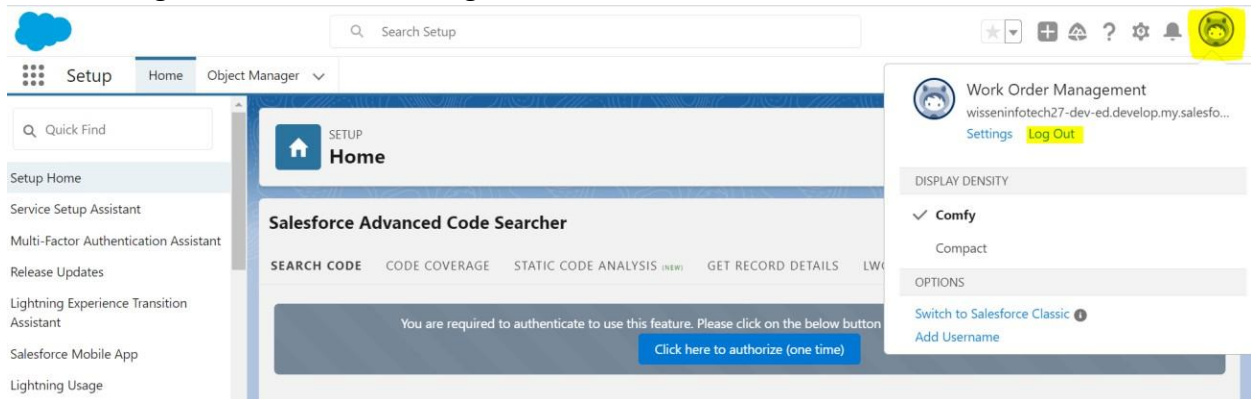


The screenshot shows the 'Reassign Opportunity' page after a refresh. The 'Users' section displays a table with columns: Name, Stage, Close Date, and LeadSource. The table contains five rows of data, with 'job Mela' now at the bottom.

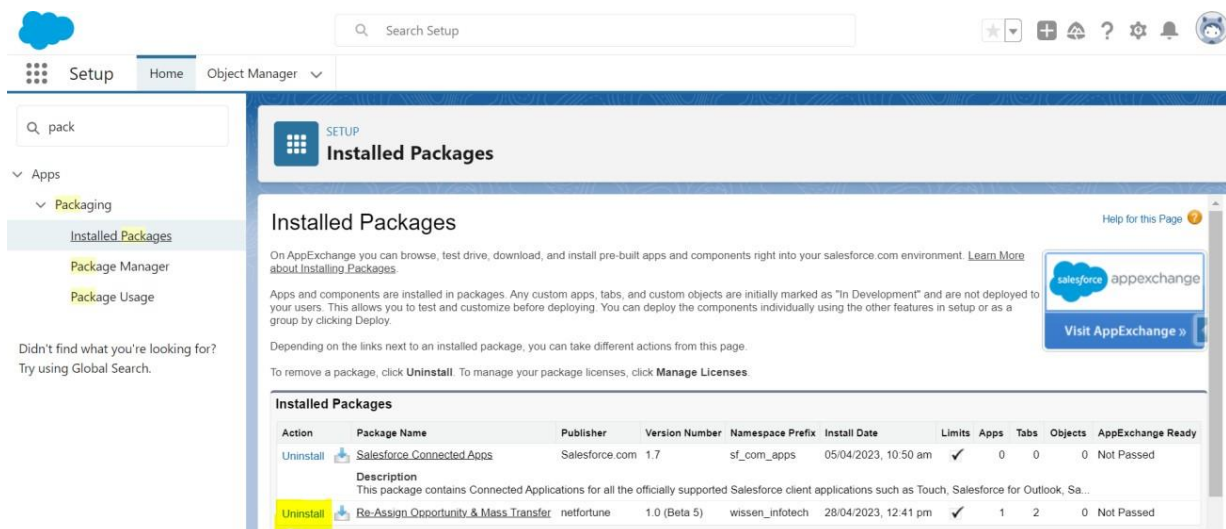
Name	Stage	Close Date	LeadSource
☐ Testing	Closed Lost	2022-07-01	
☐ lak	Closed Lost	2022-07-07	
☐ Testing	Closed Lost	2022-07-09	
☐ fhehfuesyhud	Closed Lost	2022-07-29	
☐ job Mela	Closed Lost	2022-11-30	Partner Referral

2.6 Exiting the System

- If admin wants to log out from Salesforce, click on the bear icon, which highlighted in the image below and click on log out.



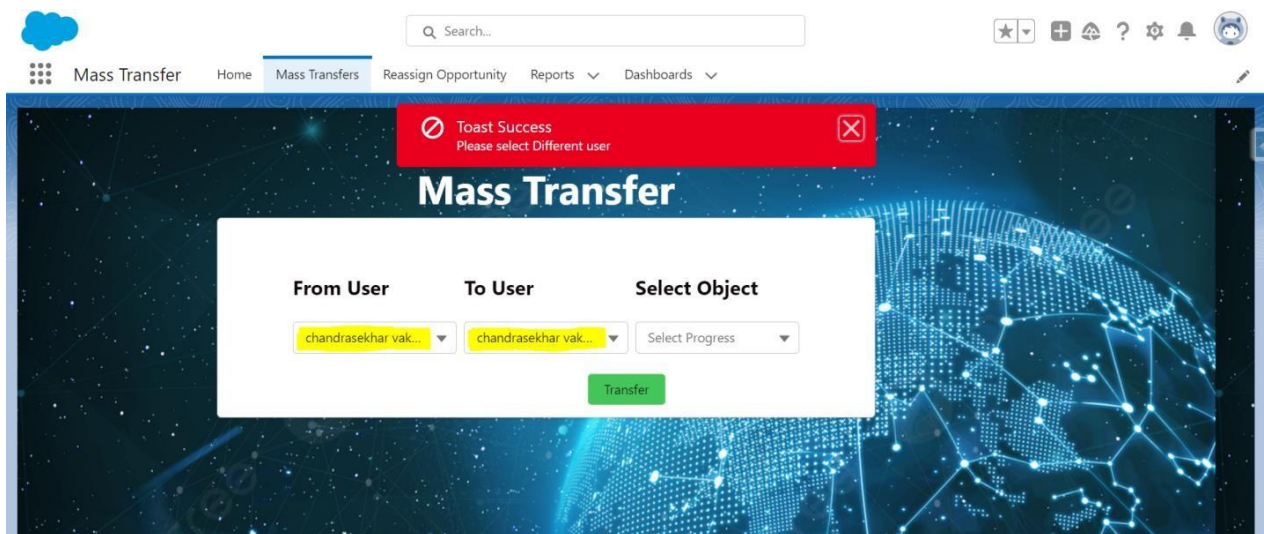
- Click the highlighted part to uninstall the package.



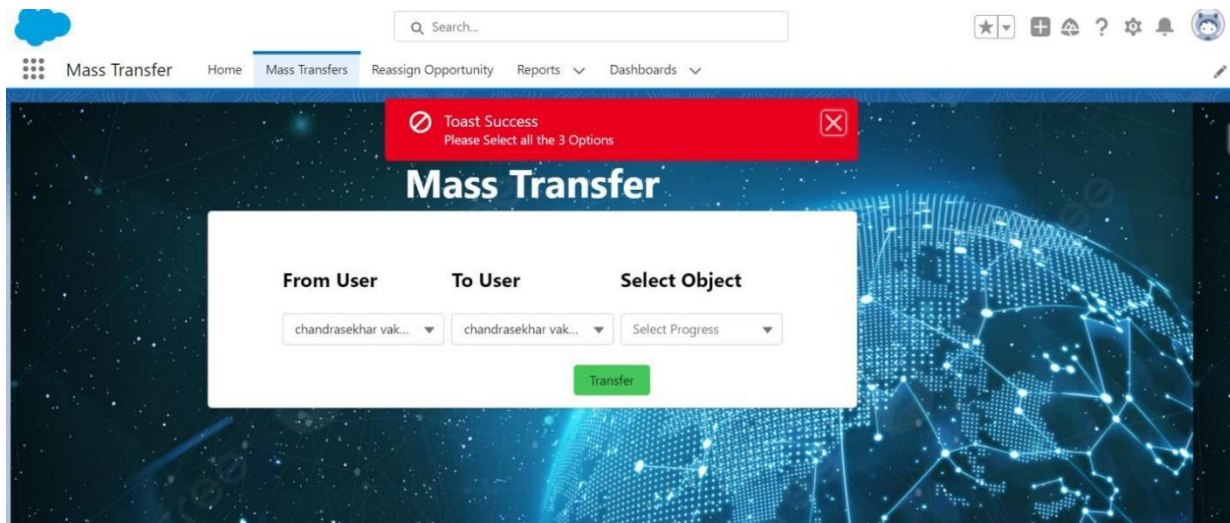
3. Post Installation, Troubleshooting & Support

3.1 Error Messages

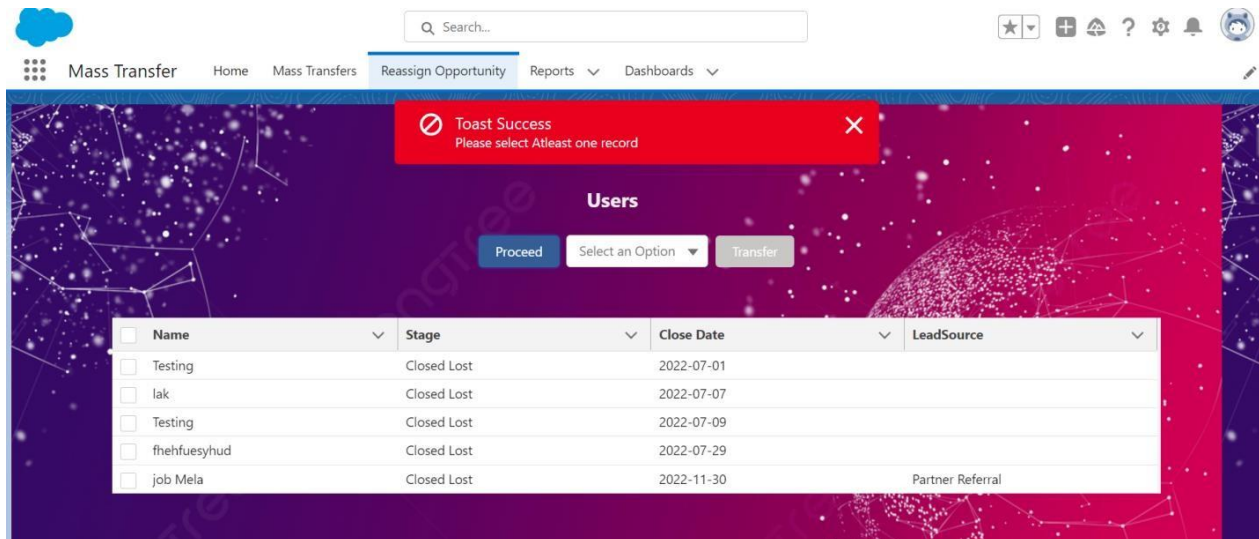
- In Mass Transfer, when the admin selects same username in both 'From User' and 'To User' then it will throw an error.



- In Mass Transfer, If admin forgets to select the object then it will throw an error message.



- In Reassign Opportunity, If admin/user forgets to select the records from the data-table and clicks on Proceed button then it will throw an error message as shown in below image.



3.2 Special Considerations

N/A

3.3 Support

The user can get emergency assistance and system support

Table 1 - Support Points of Contact

Contact	Organization	Phone	Email	Role
Srihari R	Wissen Infotech	8867796840	srihari.ravindranath@wisseninfotech.com	PM
Shalini M	Wissen Infotech	8897272195	shalini.muthyam@wisseninfotech.com	PM
Vanithadevi K S	Wissen Infotech	6374103872	vanithadevi.subramanian@wisseninfotech.com	PM

Appendix A: Approvals

The undersigned acknowledge that they have reviewed the User Manual and agree with the information presented within this document. Changes to this User Manual will be coordinated with, and approved by, the undersigned, or their designated representatives.

Table 1 - Approvals

Document Approved By	Date Approved
Obula Reddy Yerasi, Associate Vice President, Wissen Infotech	03-May-2023
Srihari R, Project Manager, Wissen Infotech	19-Apr-2023
Vanithadevi S, Program Manager, Wissen Infotech	28-Apr-2023