SOLUNUS
Enabling Customer Success

MASS TRANSFER
(USER MANUAL)

salesforce
PARTNER
SINCE 2014

Contents

OVERVIEW

The Mass Transfer Tool is a comprehensive application designed to streamline the process of transferring ownership of records across various objects within Salesforce. Here is an overview of its key features and functionalities.

User-Friendly Interface: The tool provides an intuitive user interface that allows users to easily navigate and perform ownership transfers without the need for complex configurations.

Multiple Transfer Methods: Users can choose from three different methods to transfer record ownership:

Criteria-Based Transfer: Users define specific criteria or conditions based on which records should be transferred to new owners. This method offers targeted updates according to predefined rules.

Owner-Based Transfer: Users have the flexibility to directly assign records to new owners by selecting individual owners or owner roles. This method enables quick and efficient ownership changes based on user preferences.

Upload CSV File: For updates, users can upload a CSV file containing the record IDs and corresponding new owner details. This method simplifies the process of transferring ownership for 50K records in a single operation.

Flexible Configuration: The tool allows users to configure ownership transfer rules and settings according to their specific business requirements. Users can customize criteria, select desired owners, and define mapping between record fields and CSV columns.

Efficient Record Processing: The Mass Transfer Tool is designed for optimal performance, allowing users to process a large volume of records quickly and accurately. Background processing ensures minimal disruption to users' workflow while updates are being applied.

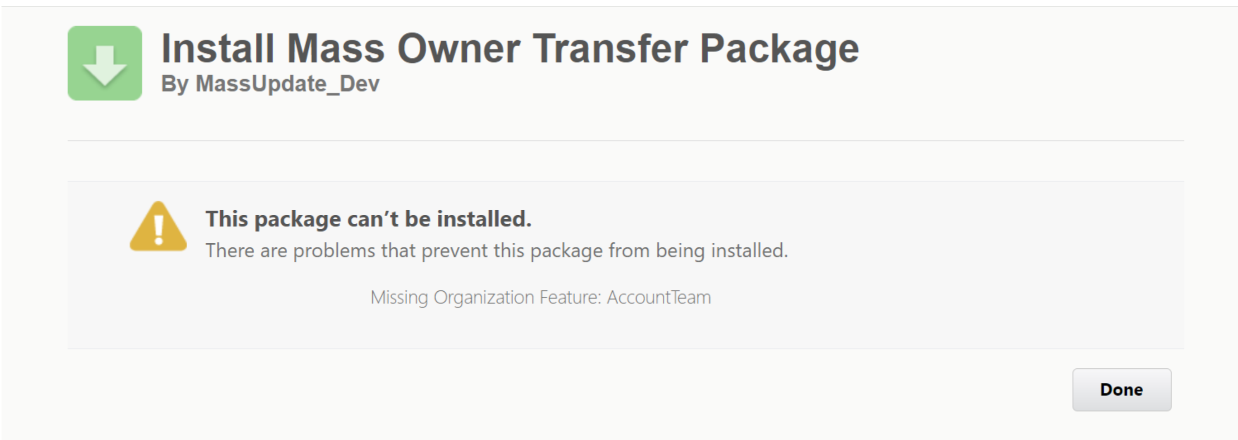
Error Handling: The tool includes robust error handling mechanisms to identify and address any validation errors or issues encountered during the ownership transfer process. Users are notified of any errors encountered, enabling them to take corrective action as needed.

INSTALLATION STEPS

PRE-INSTALLATION STEPS

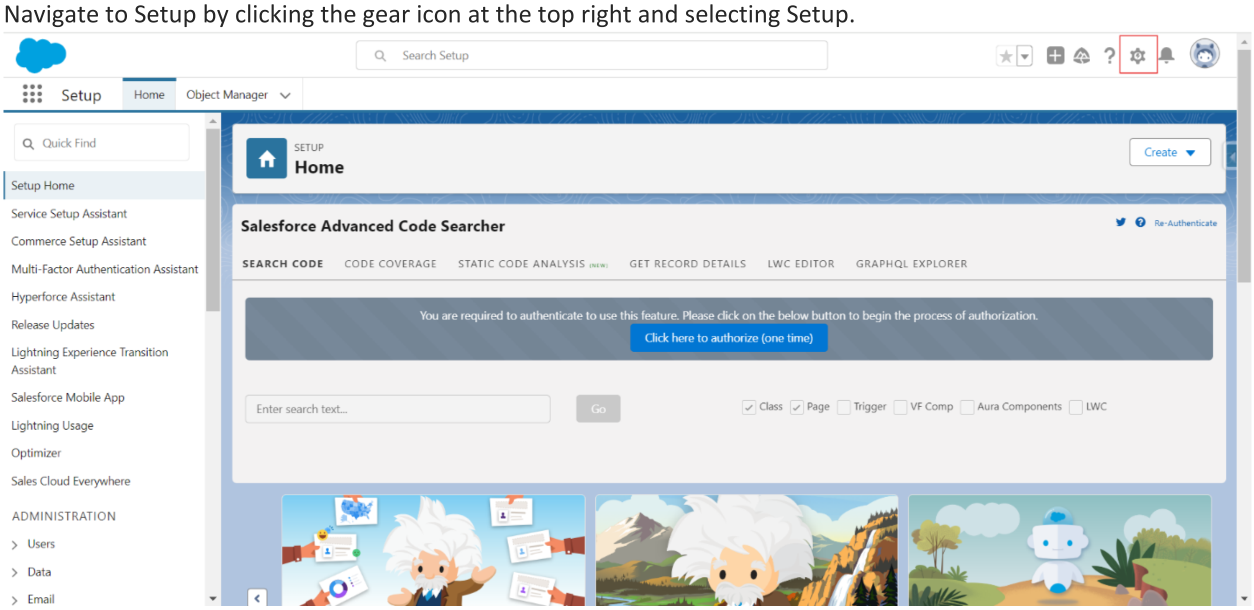
ENABLE ACCOUNT TEAMS:

Enable account teams in the installation environment if not enabled already. A message such as the one shown below will be displayed indicating an installation error, if Account Teams are not enabled

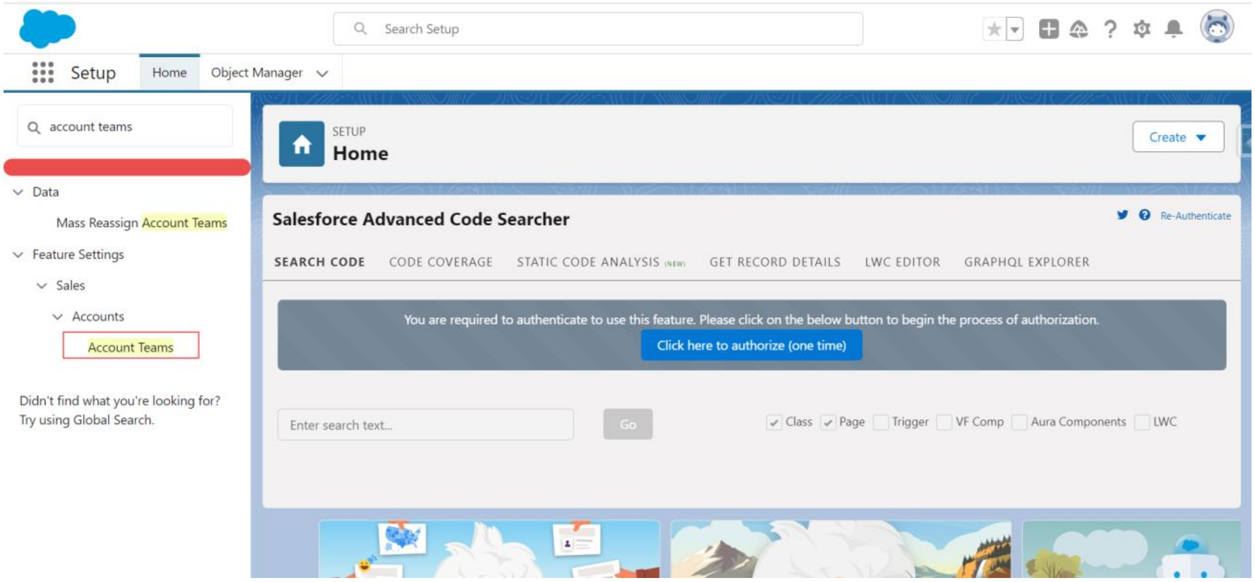


To enable the account teams, follow the below steps –

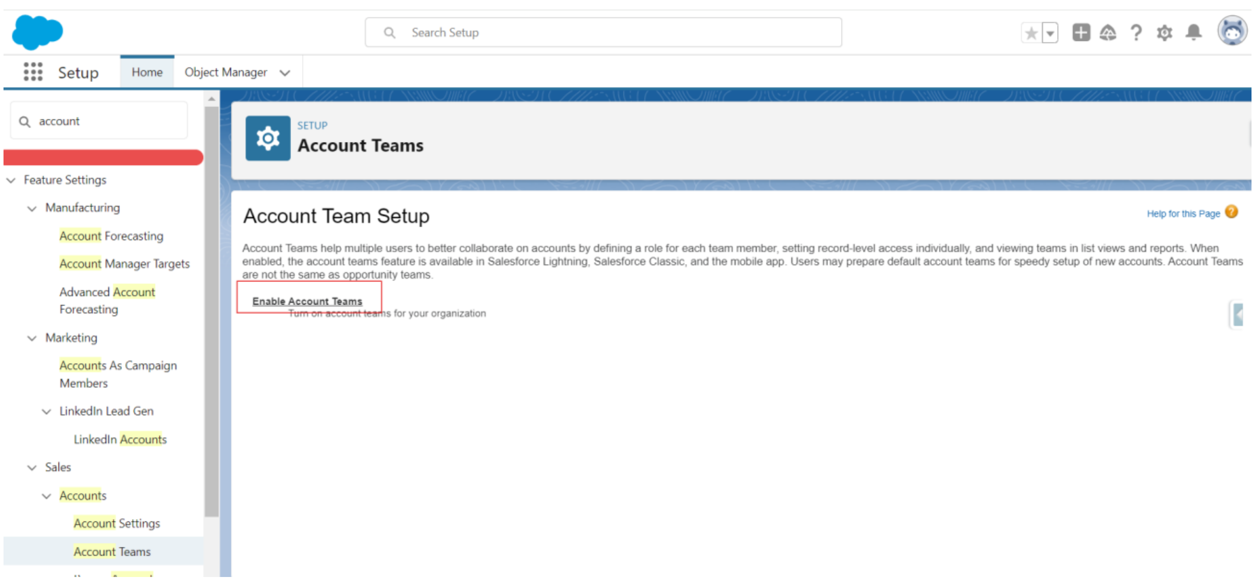
- Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



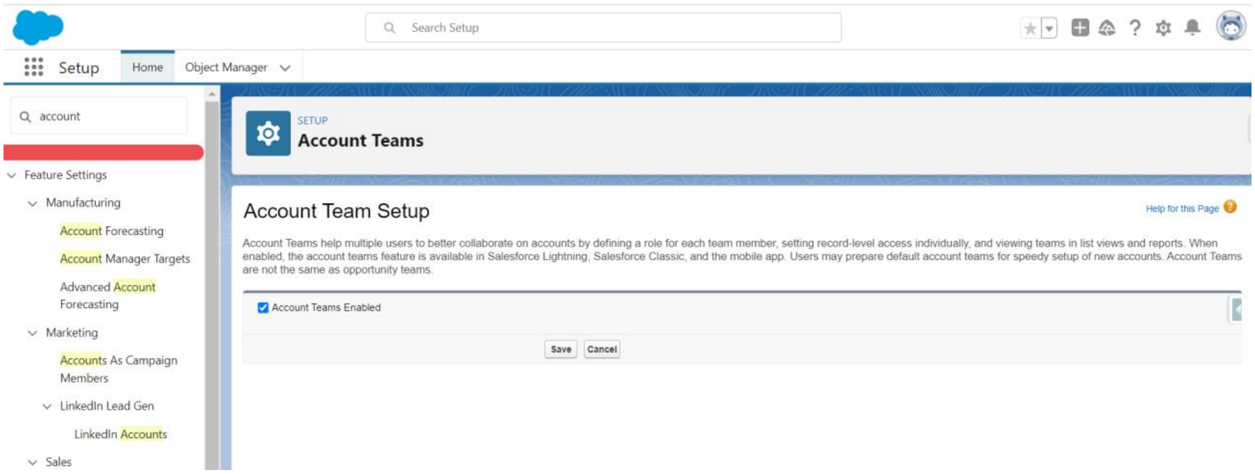
- Go to Setup.
- Search for *Account Teams*.



- Click on **Enable Account Teams**. Please ignore if it is already enabled



- Check the *checkbox **"Account Teams Enabled"*** and click on ***Save***

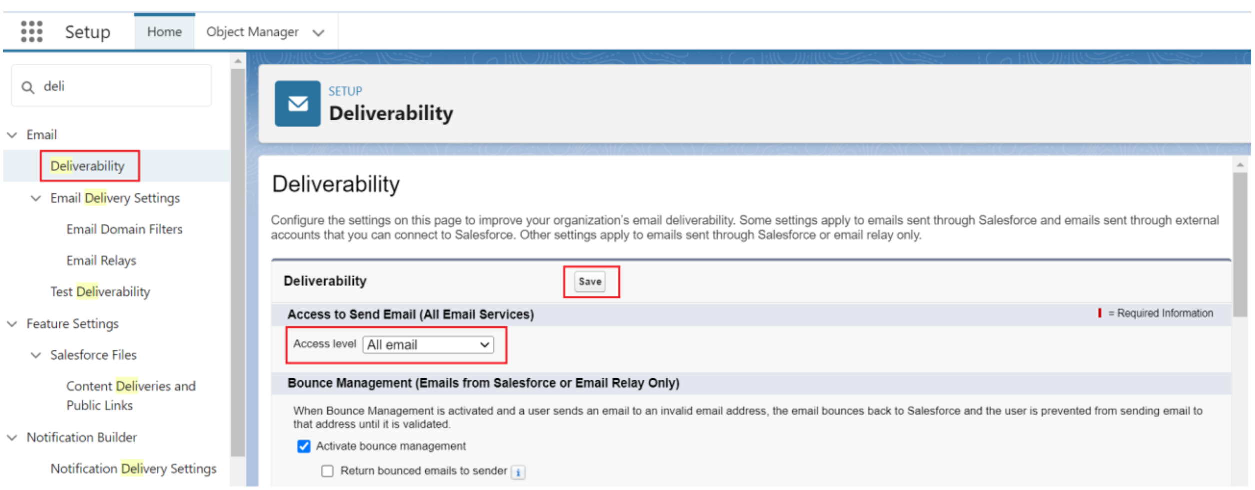


ENABLE EMAIL DELIVERABILITY TO ALL USERS

Email deliverability in Salesforce refers to the ability to successfully deliver emails from the platform to recipients' inbox when Records are successfully transformed.

You can enable *email deliverability to all users* by following the steps listed below.

- Navigate to Setup
- Search for *Deliverability*
- Select ***Deliverability*** under Email.
- Select ***All email*** as the access level.
- Click **Save**.



STEPS FOR INSTALLATION OF THE PACKAGE

1. Go to the installation URL. Or, if you're installing the package from AppExchange, click **Get It Now** from the application information page.

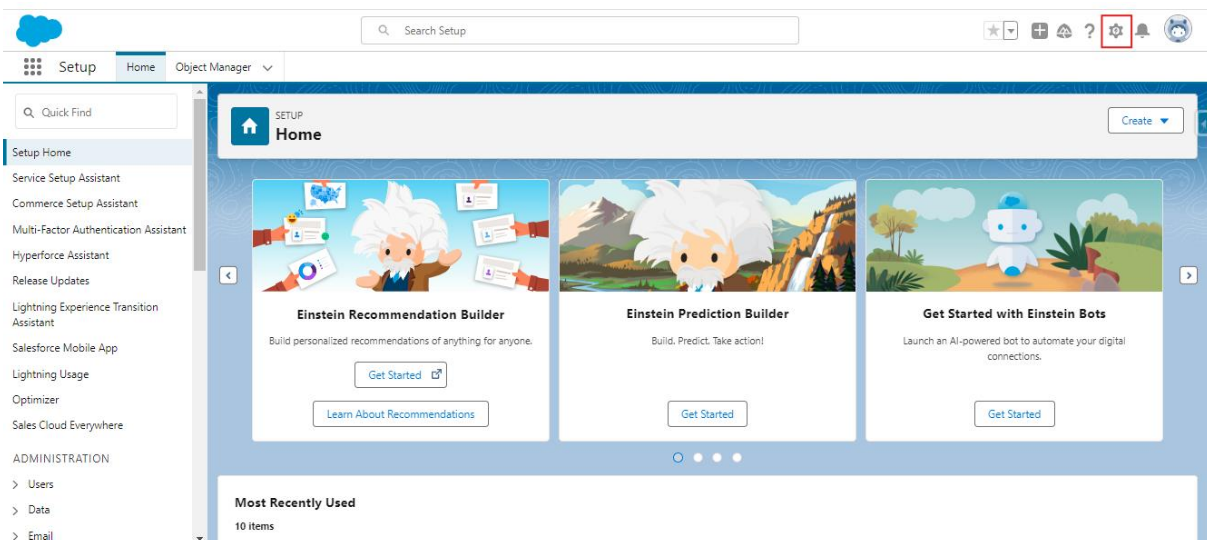
2. Enter the Username and Password for the Salesforce organization in which you want to install the package, and then, click **Login**.
3. Select ***Install in Production*** or ***Install in Sandbox***.
   Note: If you're installing it into a sandbox, replace the part of the package installation link containing www.salesforce.com or Login.salesforce.com with ***test.salesforce.com****.*
4. Accept the terms and conditions, and then, click **Confirm and Install.**
5. Enter your org credentials.

POST INSTALLATION STEPS

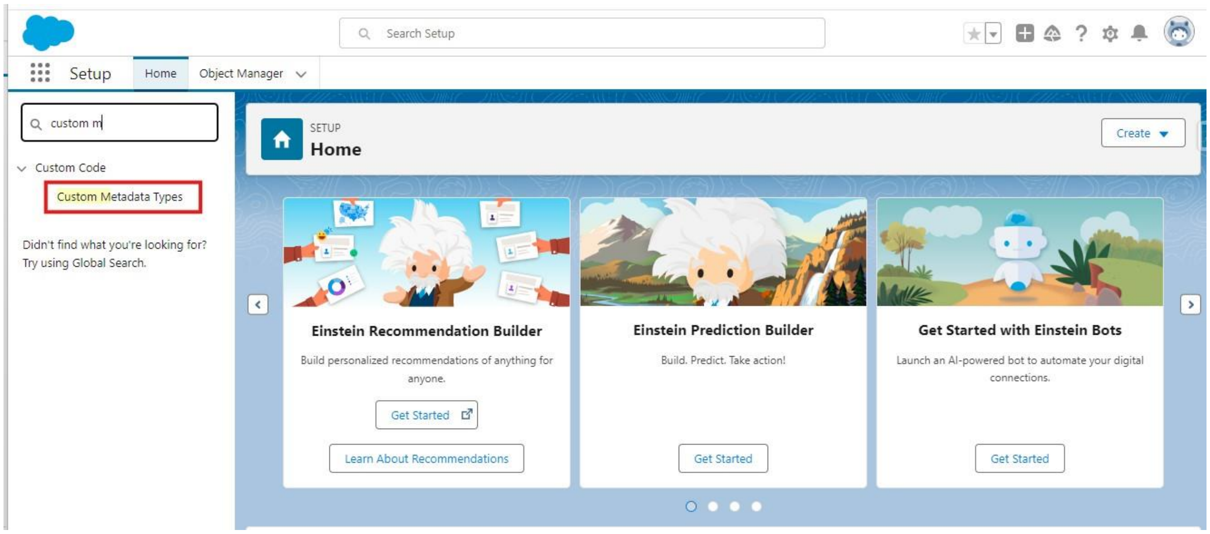
If custom metadata is not provided, we are unable to view the specific values or determine which SObjects and their related child records are being transferred during the Mass Transfer process.

It's important to provide custom metadata during the Mass Transfer process because, without it, you can't see key details like which records are being transferred or which related child records are involved.

1. **Login to Salesforce**: Open your browser and log in to your Salesforce instance.
2. **Navigate to Setup**: Click on the gear icon in the top-right corner and select "Setup" from the dropdown menu.

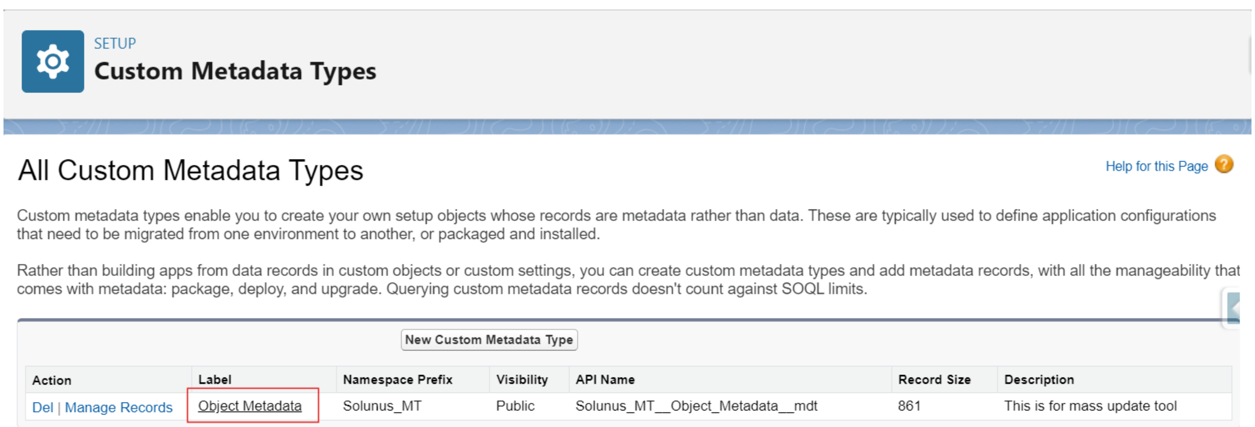


3. **Search for Custom Metadata Types:** In the Quick Find box on the left, type "Custom Metadata Types" and select it from the search results.



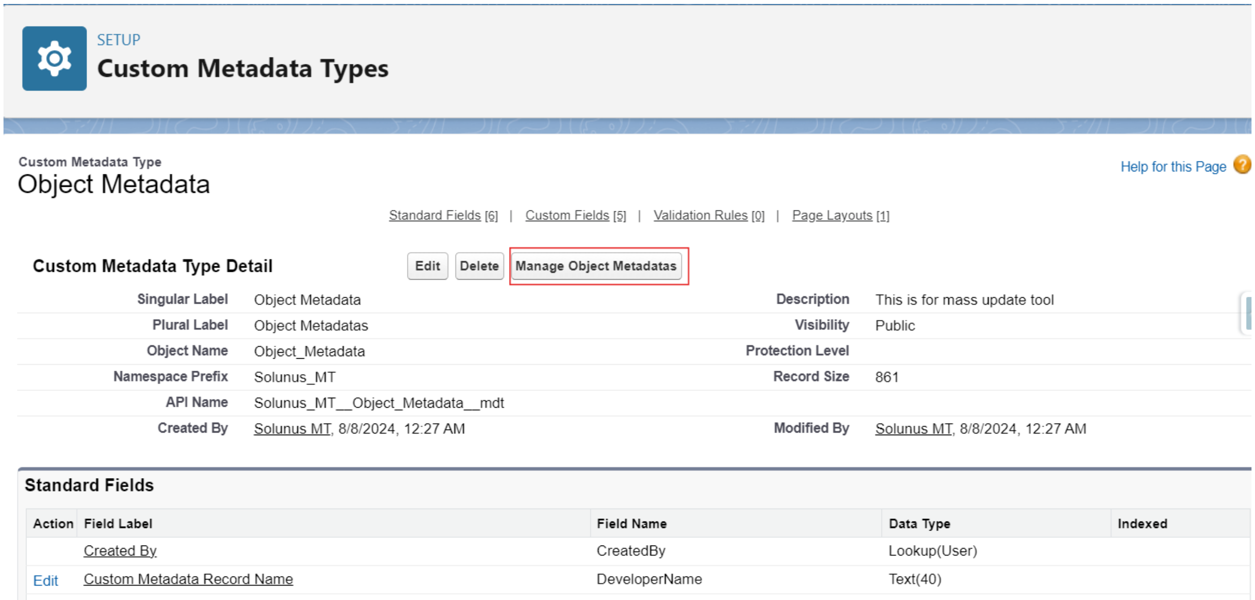
4. **Select the Custom Metadata Type:**

In the list of Custom Metadata Types, find and click on **Object Metadata**. This is the custom metadata type you'll be using to store the relationship information between parent and child objects.

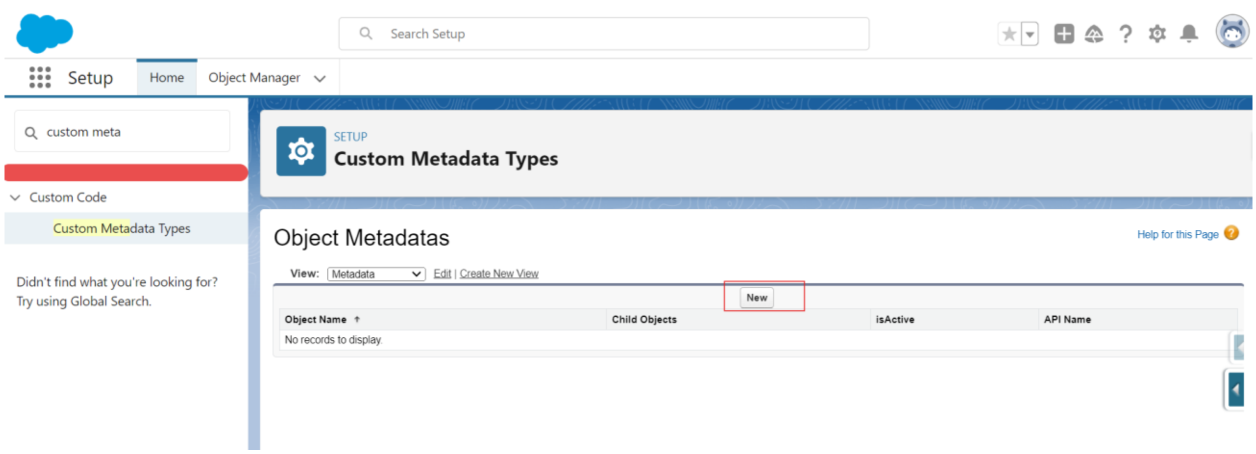


5. **Manage Records:**

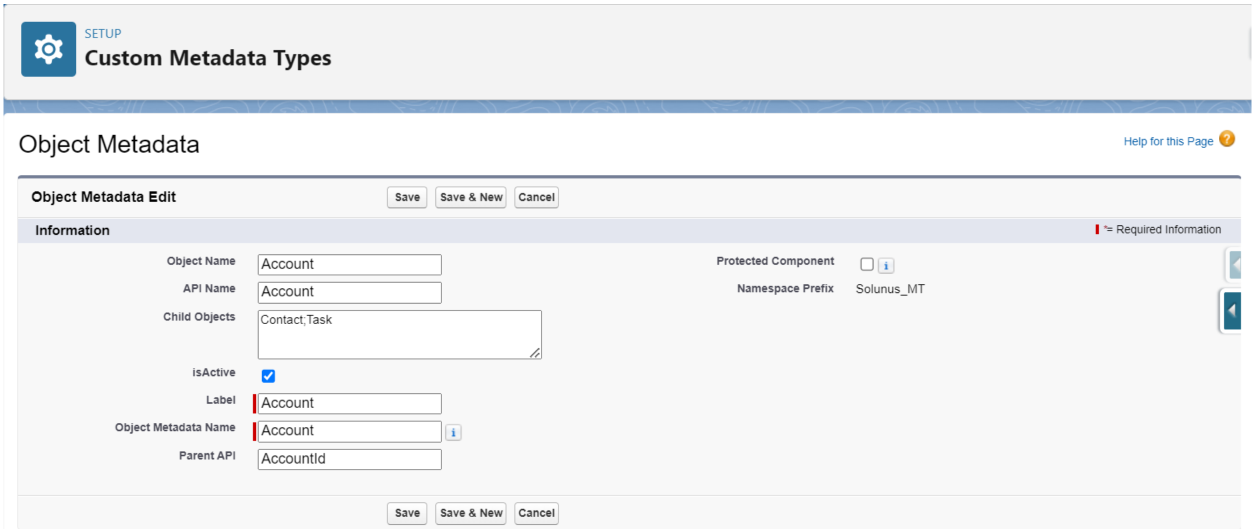
Click on “**Object Metadata**”. This will take you to a list of existing records for this metadata type.



6. Click on “**Manage Object Metadatas**” and then click on “**New**" button to create a new custom metadata record.



7. Fill the required details



FIELD DESCRIPTIONS:

Field Name	Description
Object Name	Name of the "**sobject"** record
API Name	Enter the API name of the object here. The API name is usually a unique identifier that follows certain naming conventions
Child Objects	Find the field labelled **"Child Objects"**. Enter the names of any child objects related to the primary object. Use semicolons (;) to separate multiple child objects and do not include spaces between the names
isActive	Locate the checkbox labelled **"Is Active"**. Click this checkbox to mark it as checked. This action indicates that the object is active and in use within the Mass Transfer.
Label	Label is what users see in the Salesforce user interface, making it easier to identify
Parent API	Enter the API name of the field that represents the parent in the child objects

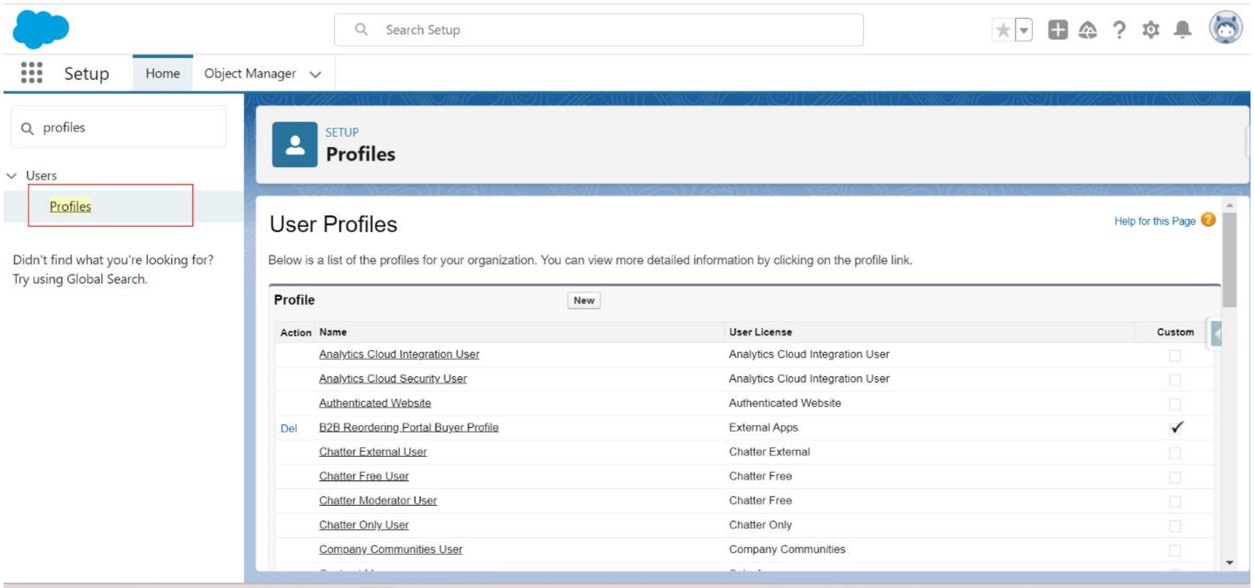
8. Click on "**Save"**

PROVIDING ACCESS AT PROFILE LEVEL:

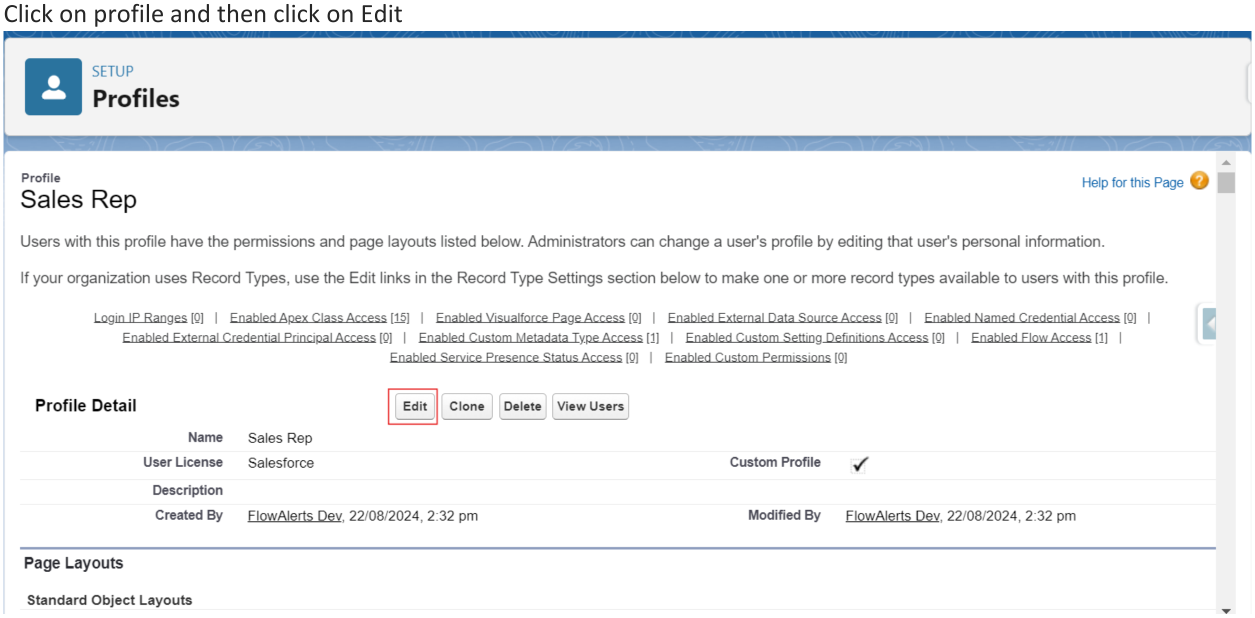
Providing access at the profile level is crucial in Salesforce because it controls which users can view, edit, or manage specific data and functionalities. This ensures proper data security and user permissions.

Please follow the below steps to provide access at the profile level

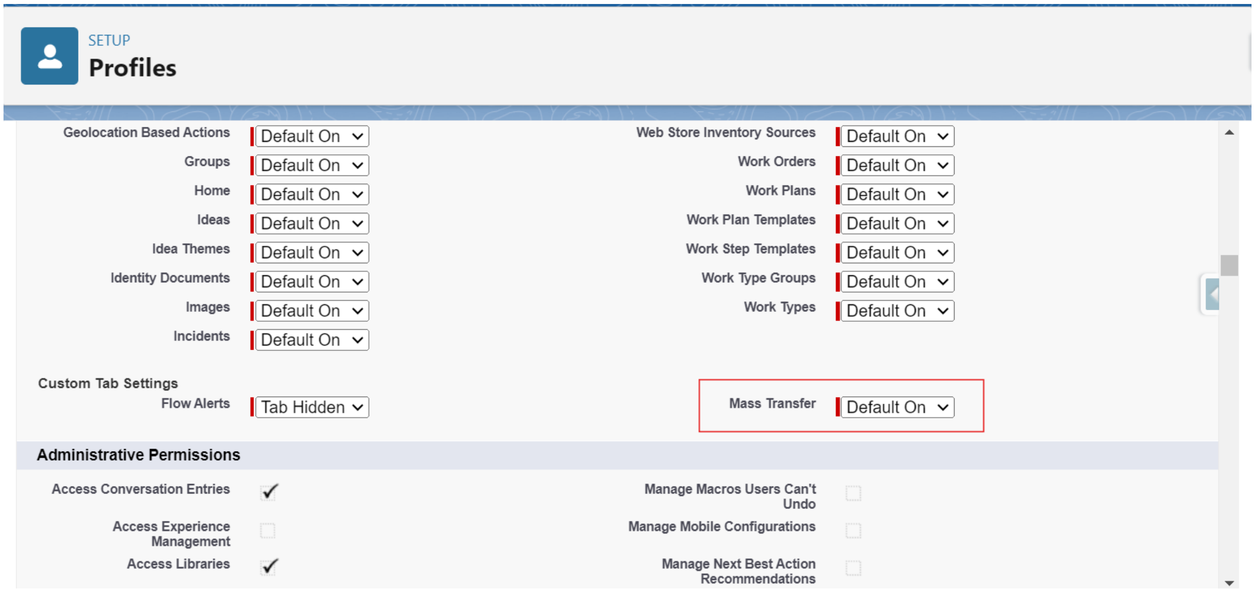
- In the Setup search box, type "Profiles" and click on "Profiles" under the "Users" section.



- Select the profile: Find and click on the name of the profile for which you want to grant access to the tab.
- Click on profile and then click on Edit

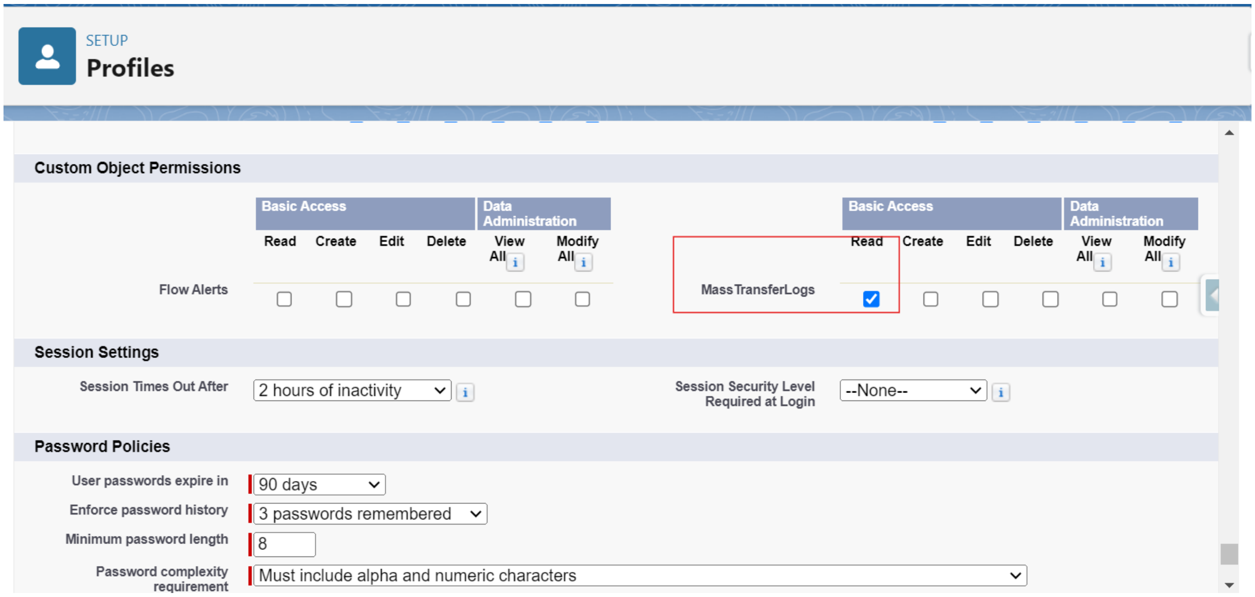


- **Edit App Permissions**: Locate the object (**Mass Transfer)** that you want to provide access to, under" **Tab Settings**"section→Go to" **custom tab Settings**" section →select "**Default On**" from the drop down and click on save

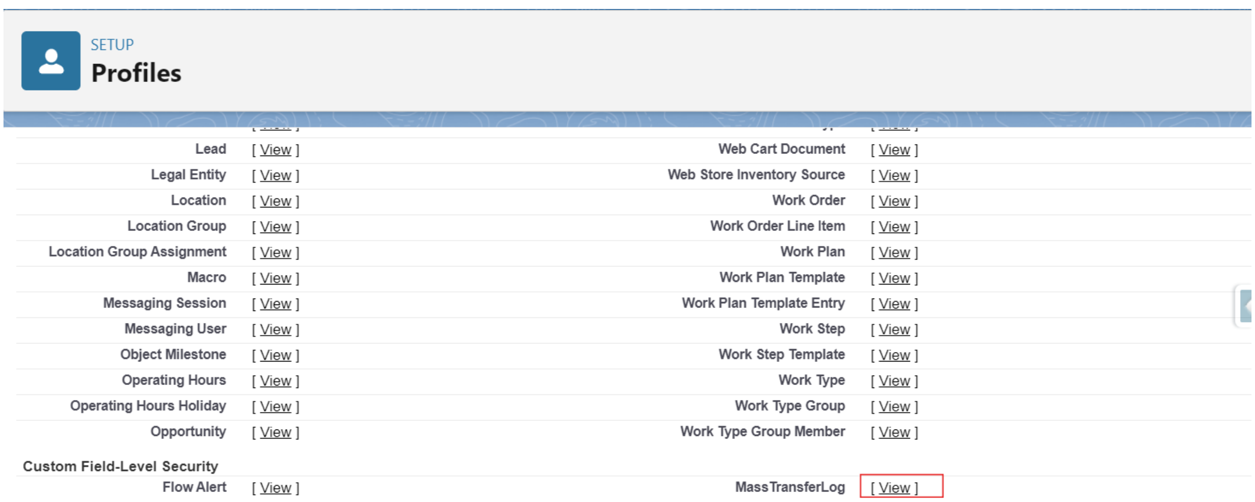


- **Set App Permission**: Go to "**Custom App Settings**" →select Mass Transfer objects and then check "Visible" checkbox and then click on save

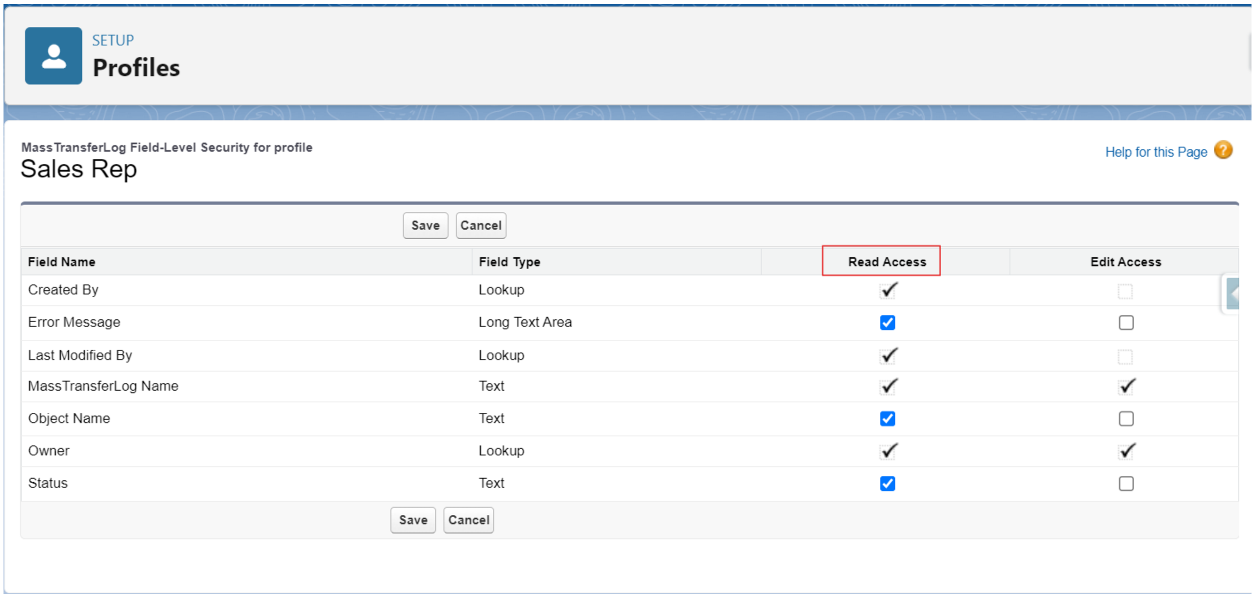
- **Set Object Permissions**: Go to "**Custom Object Settings**"→ check the checkbox for Read access



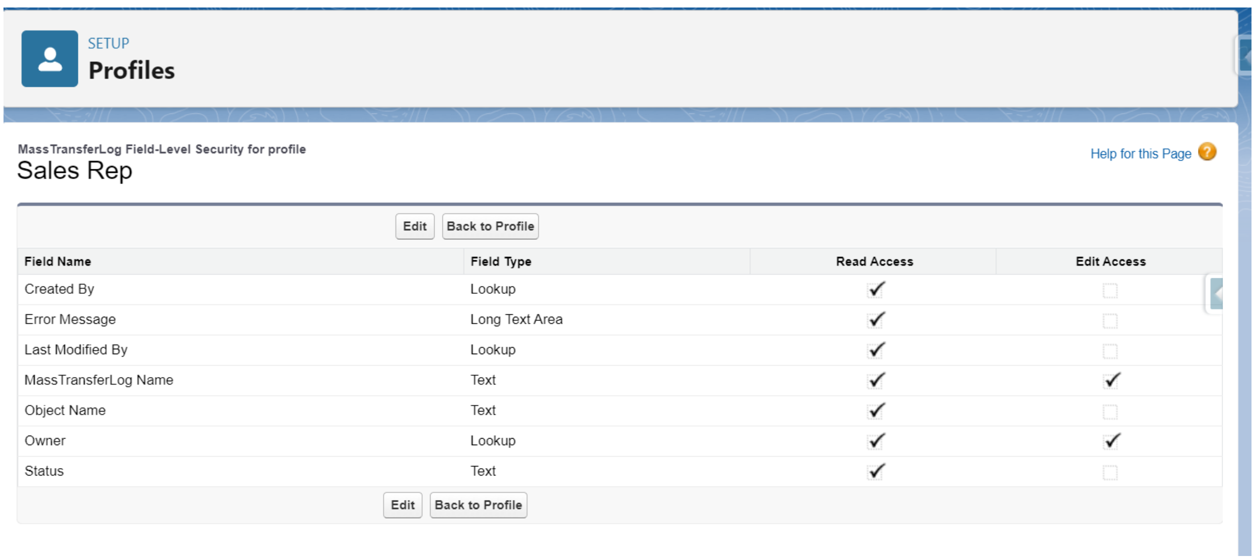
- Click on save
- Click on view



- Select “**checkbox**” under “**read access**”



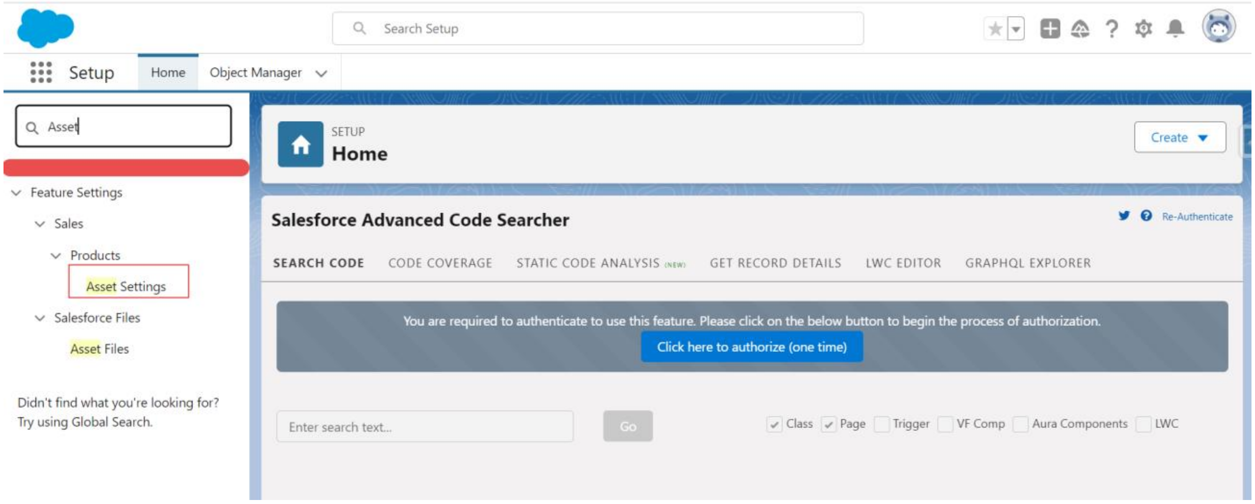
- Click on Save.



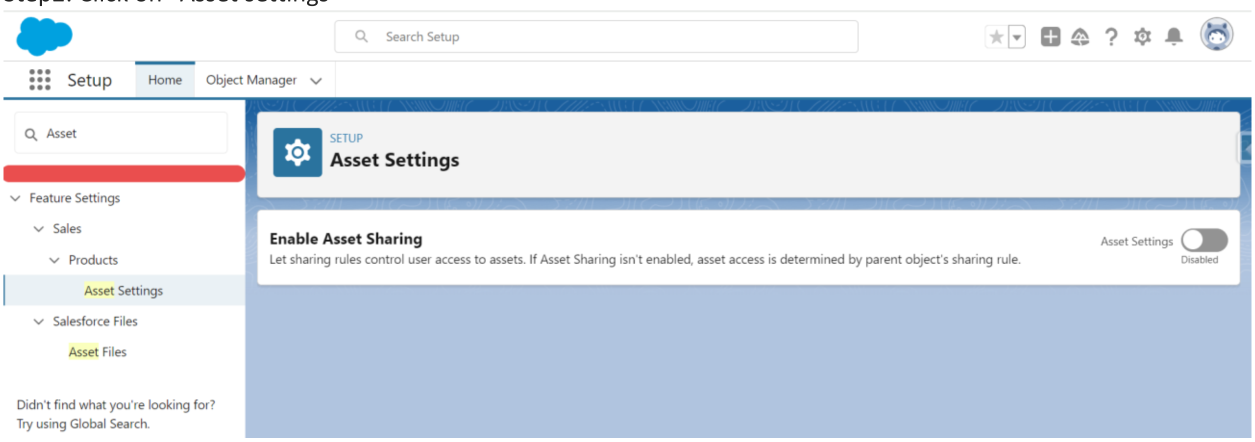
Note: To transfer records for the *Asset* object, the following steps should be completed. Please ignore If already done.

Steps to enable:

Step1: In quick find box search for "**Asset settings**"

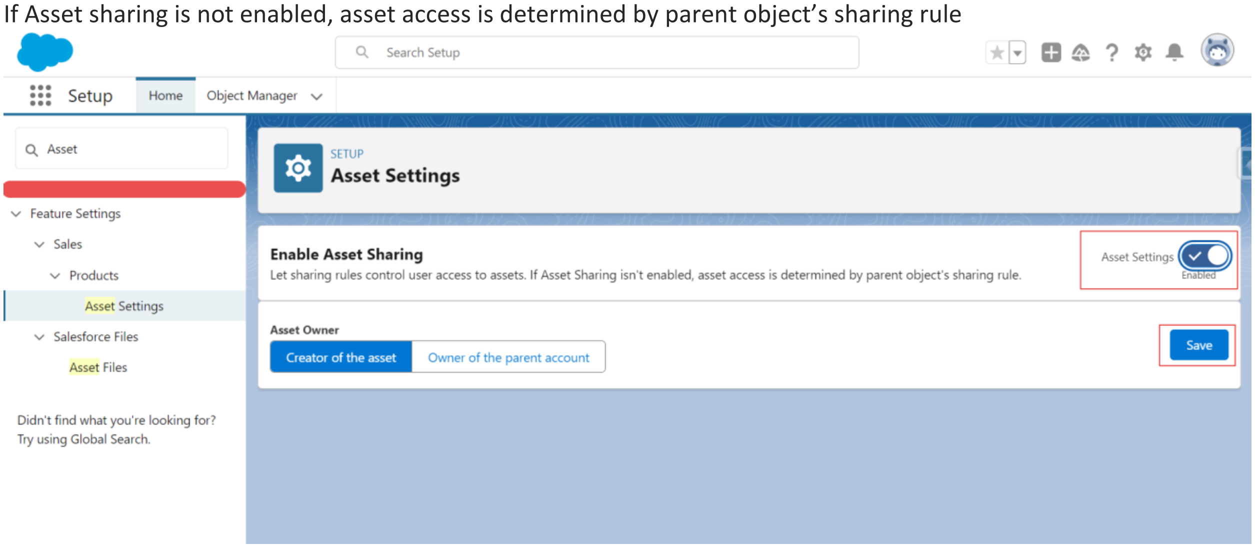


Step2: Click on "Asset settings"



Step3: Enable "***Enable Asset Sharing"*** and click on save

If Asset sharing is not enabled, asset access is determined by parent object's sharing rule



MASS TRANSFER CONFIGURATION

PRODUCT OVERVIEW

The Mass Transfer Tool is designed to streamline the process of transferring ownership of records across various objects within Salesforce. Below are its key features and functionalities:

Key Features:

1. User-Friendly Interface:

- Intuitive and easy to navigate
- Minimal need for complex configurations

2. Multiple Transfer Methods:

- **Criteria-Based Transfer:** Define specific criteria for targeted record transfers.
- **Owner-Based Transfer:** Directly assign records to new owners by selecting individual owners or roles.
- **Upload CSV File:** Bulk updates by uploading a CSV file with record IDs and new owner details.

3. Flexible Configuration:

- Customize transfer rules and settings to meet specific business requirements.
- Define criteria, select owners, and map record fields to CSV columns.

4. Efficient Record Processing:

- Optimized for processing large volumes of records quickly and accurately.
- Background processing minimizes workflow disruption.

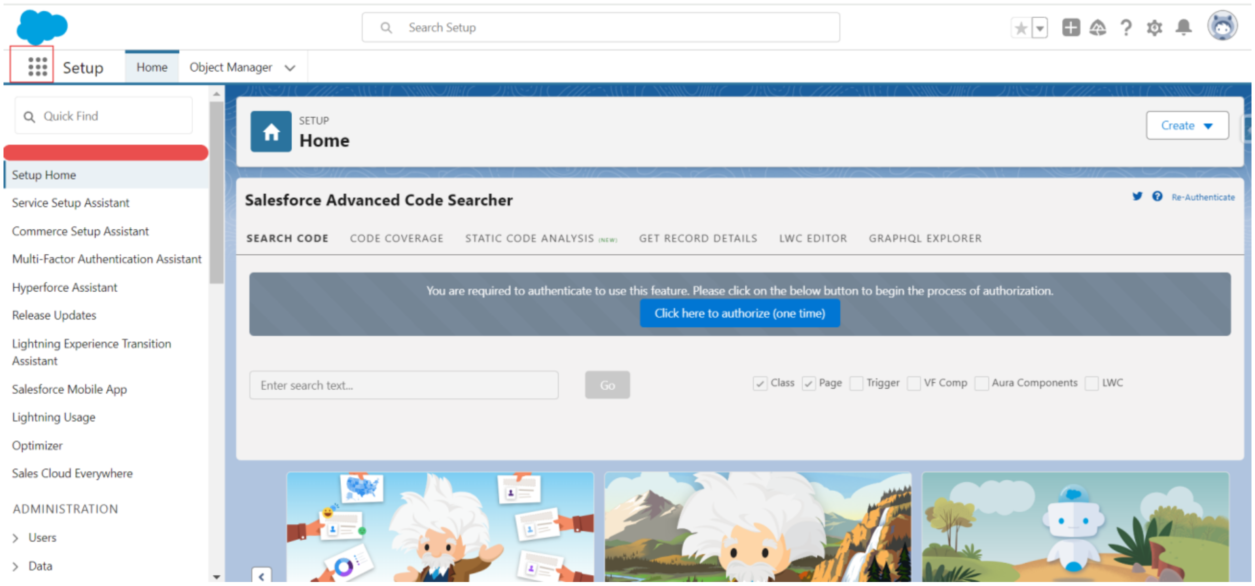
5. Error Handling:

- Robust mechanisms to identify and address validation errors.
- Users are notified of errors to take corrective action

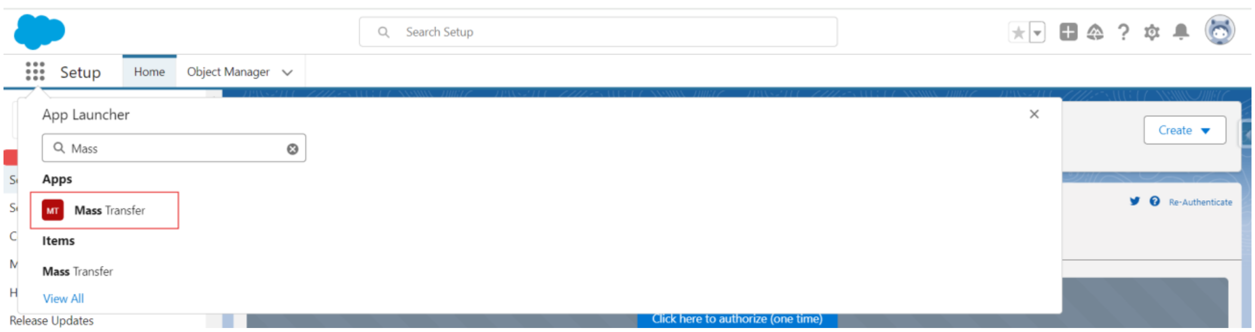
NAVIGATION TO MASS TRANSFER APP

Steps to navigate

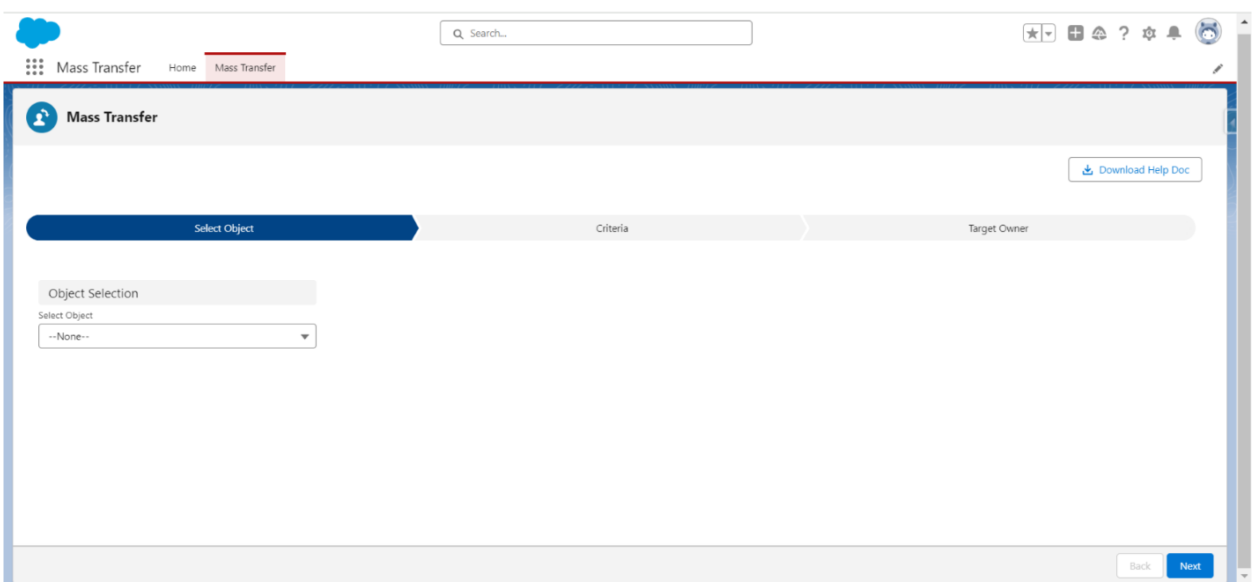
- Locate the App Launcher icon. It looks like a grid of nine dots, usually found in the top-left corner of the Salesforce interface.

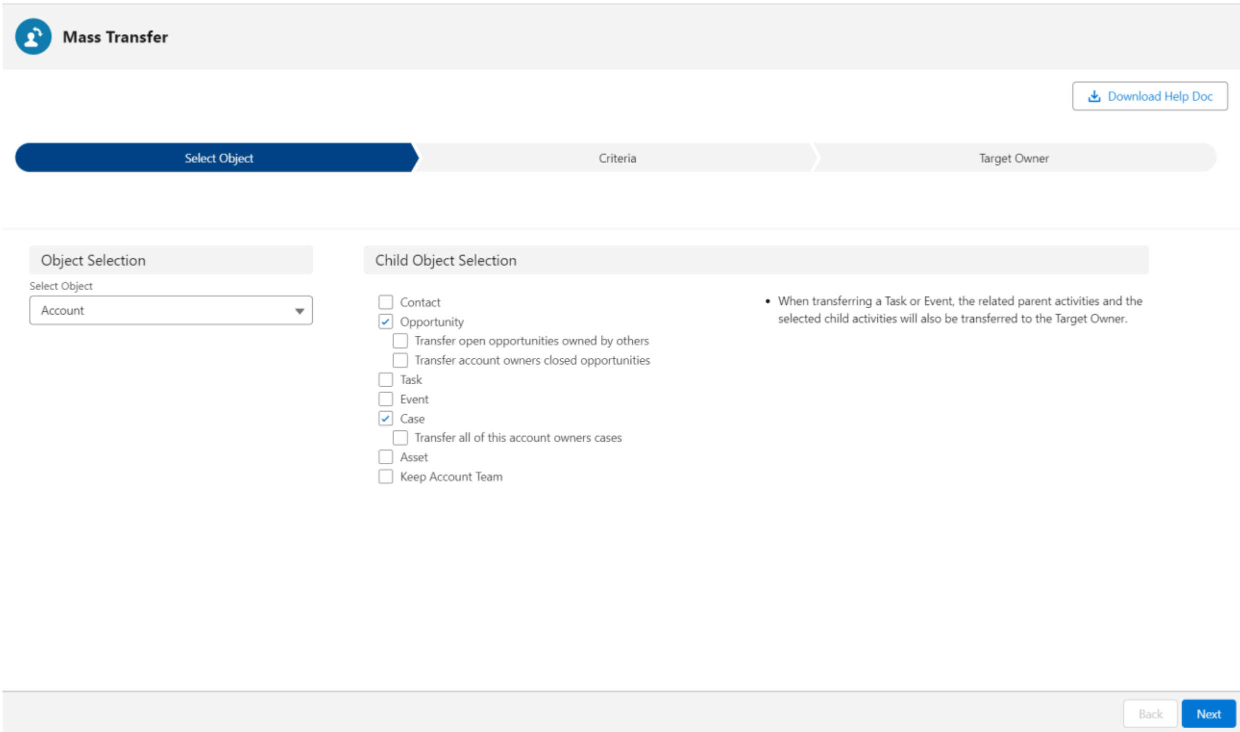


- Click on the App Launcher icon to open the App Launcher menu.
- Search the name of the app, and it should appear in the search results.



- Click on Mass Transfer app
- The user interface for this tool looks as follows:





Name	Description
Select Object	The dropdown menu allows users to select an object, with the available options dynamically populated based on the metadata configuration.
Child Object Selection	The child object selection section enables users to choose a child object that has been defined in the metadata under the corresponding parent
Opportunity	We have two options under opportunity 1.Transfer Open opportunities owned by others: We can transfer open opportunities related to an account, even if they are owned by other users 2.Transfer account Owners Closed Opportunities: When transferring the ownership of an account, If we check the checkbox we can transfer ownership of all closed opportunities associated with that account.
Case	We have an option under case object 1.Transfer all this account owner cases: When transferring the ownership of an account, you also have the option to transfer all cases associated with that account to the new owner
Back	The Back button is used to navigate to the previous page, allowing users to return to the last screen they were viewing.

The Mass Transfer tool allows records to be transferred to another owner based on **three** criteria:

Owner Based: Transfer records based on the current owner.

Criteria Based: Transfer records to a new owner based on defined criteria.

Upload CSV: Transfer records by uploading a CSV file containing the Ids.

USE CASE FOR OWNER BASED:

Updating Record Ownership During Team Restructuring

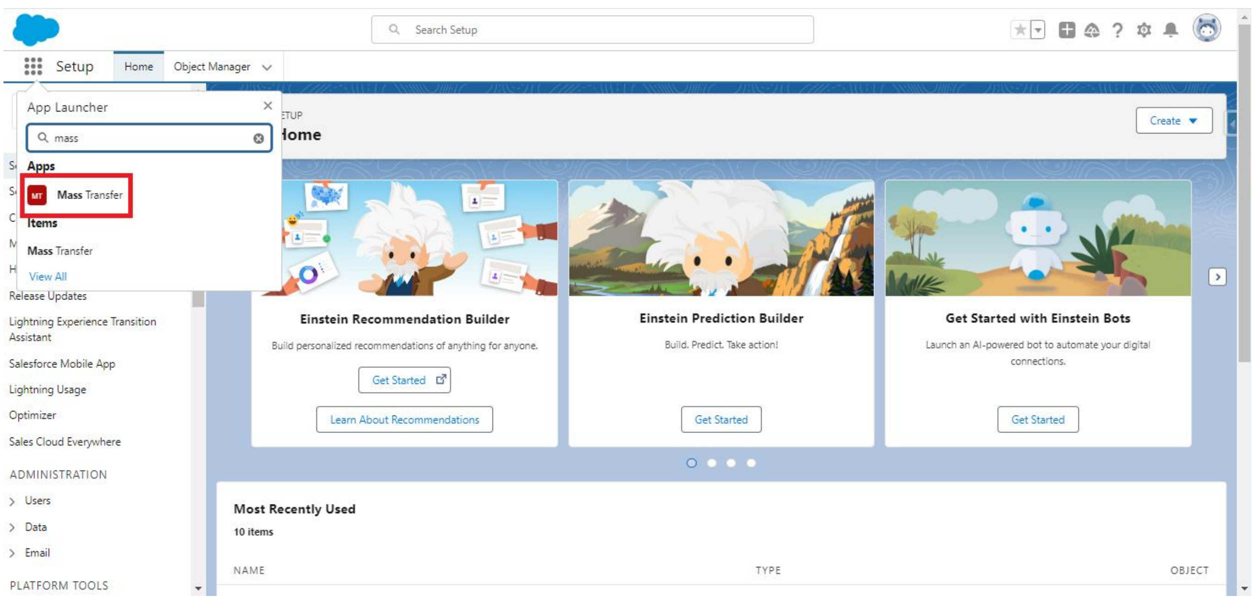
- Our Goal is to update the ownership of sales records to reflect new team configurations after a restructuring, to achieve this we have Mass Transfer which is accessible.
- We can choose the "**Owner-Based Transfer**" method within the Mass Transfer Tool for a direct reassignment.

SCENARIO:

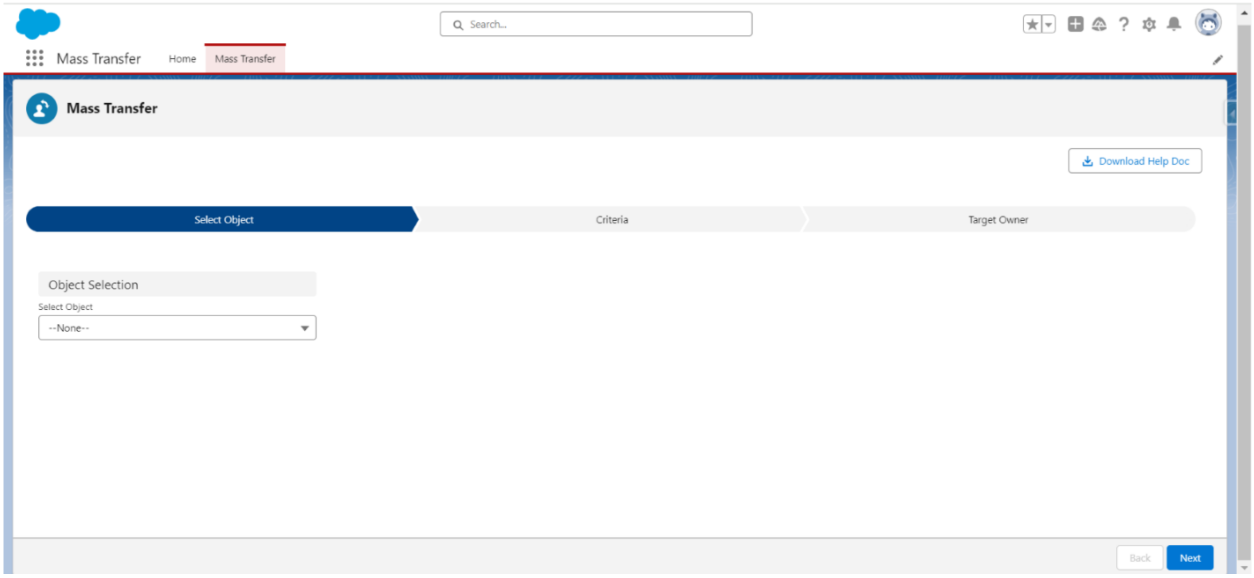
Let us consider scenario if the Human Resources Manager and the Sales Manager work together to update ownership of sales team records using the mass Transfer feature. They identify records currently owned by team members affected by restructuring and reassign them to the new team members. This ensures that sales opportunities and customer relationships transition smoothly, maintaining sales operations continuity despite the organizational changes.

Follow the steps to transfer records based on owner

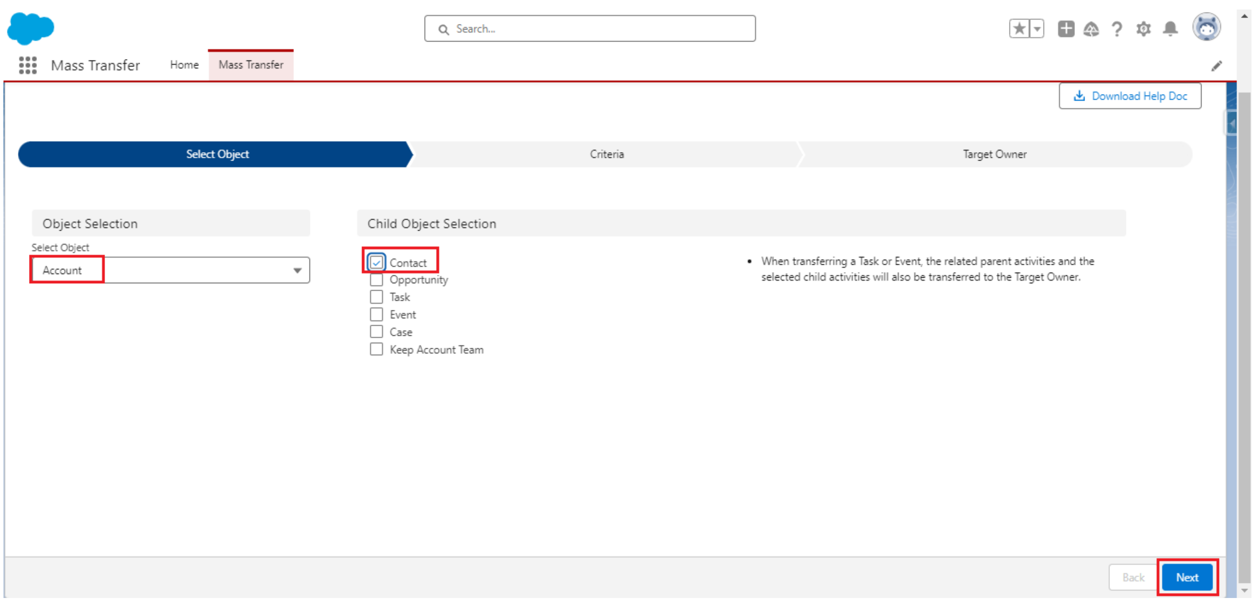
Step1: Go to setup and select the app name as mass transfer



- The user interface for this tool looks as follows:

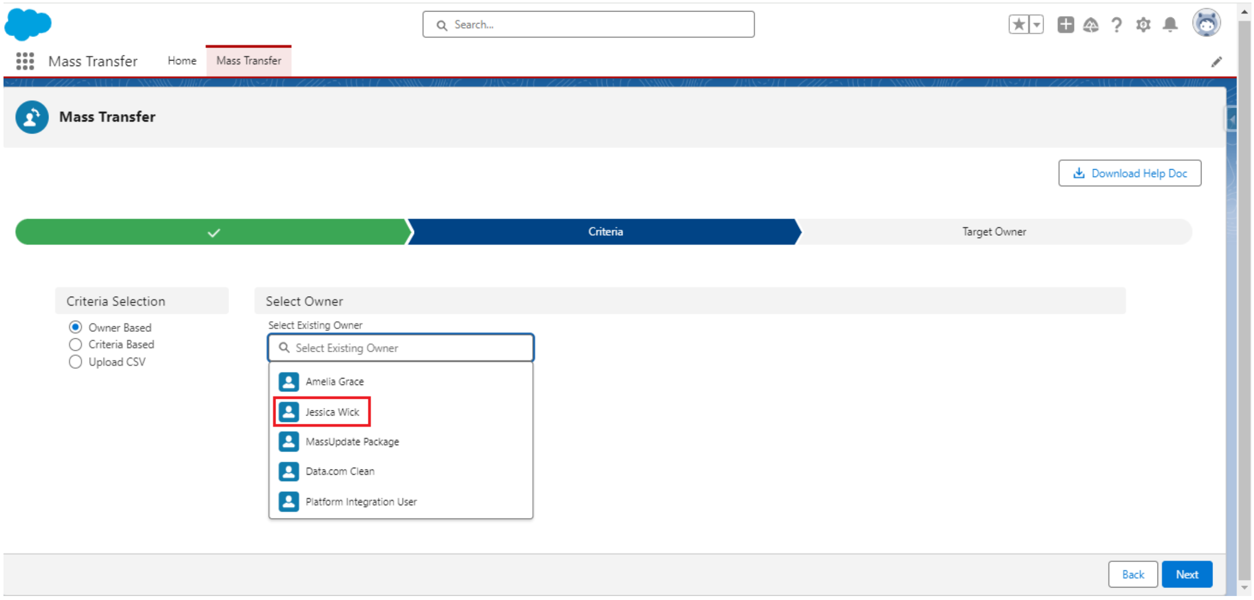


Step2: From the "***Select Object***" drop down select the Object as Account with child object as Contact and click on Next

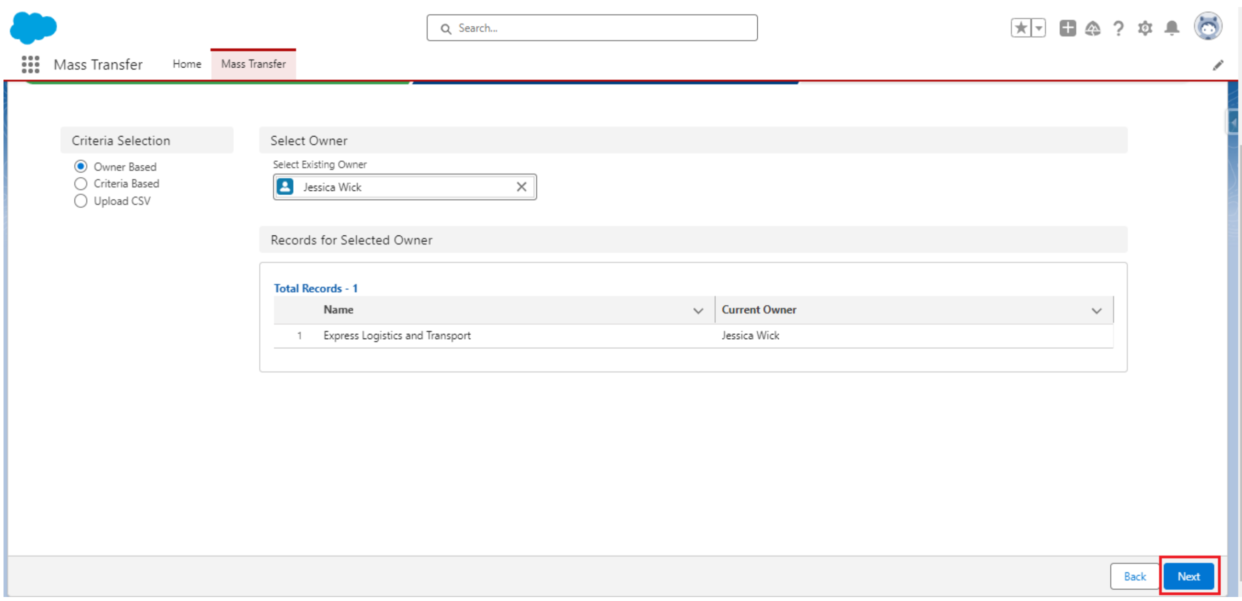


Step3: We are transferring records to new owner

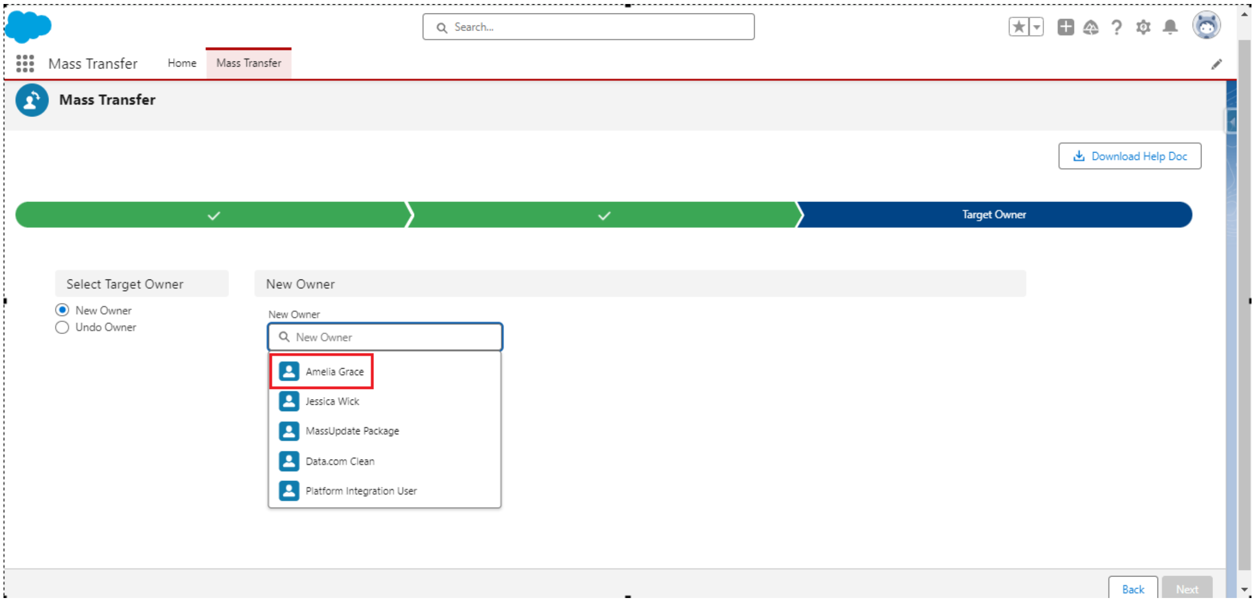
Let us consider an example if we want to transfer records of Jessica Wick to Amelia Grace. Here we will be selecting the current owner as Jessica Wick



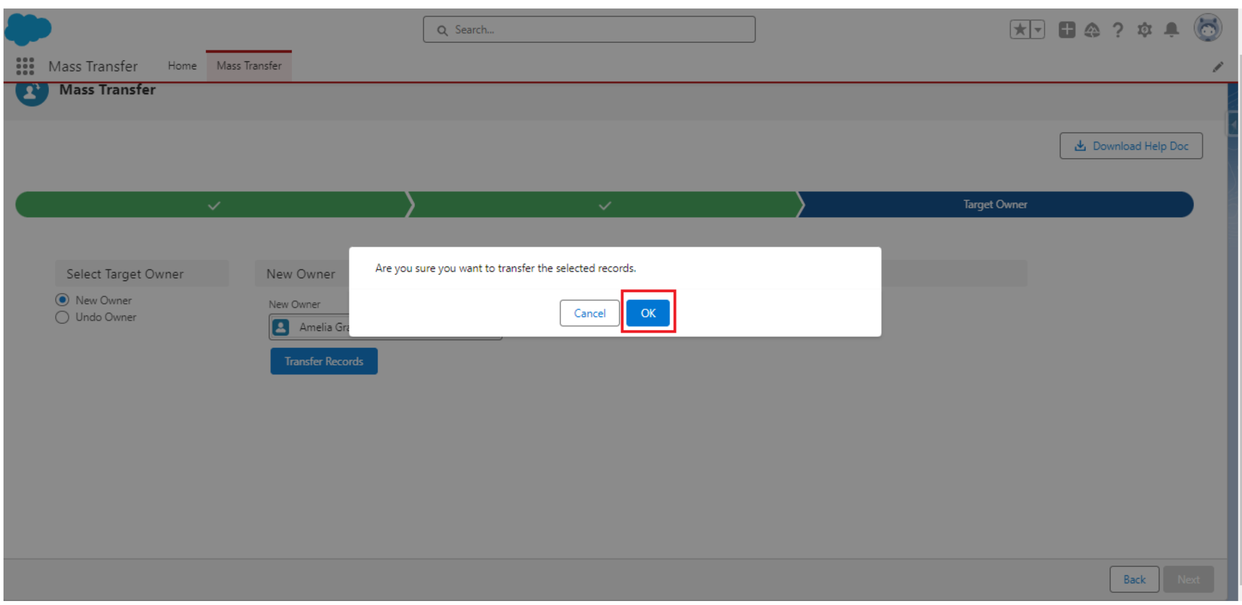
Step4: So, on the existing owner we have one record and click on next



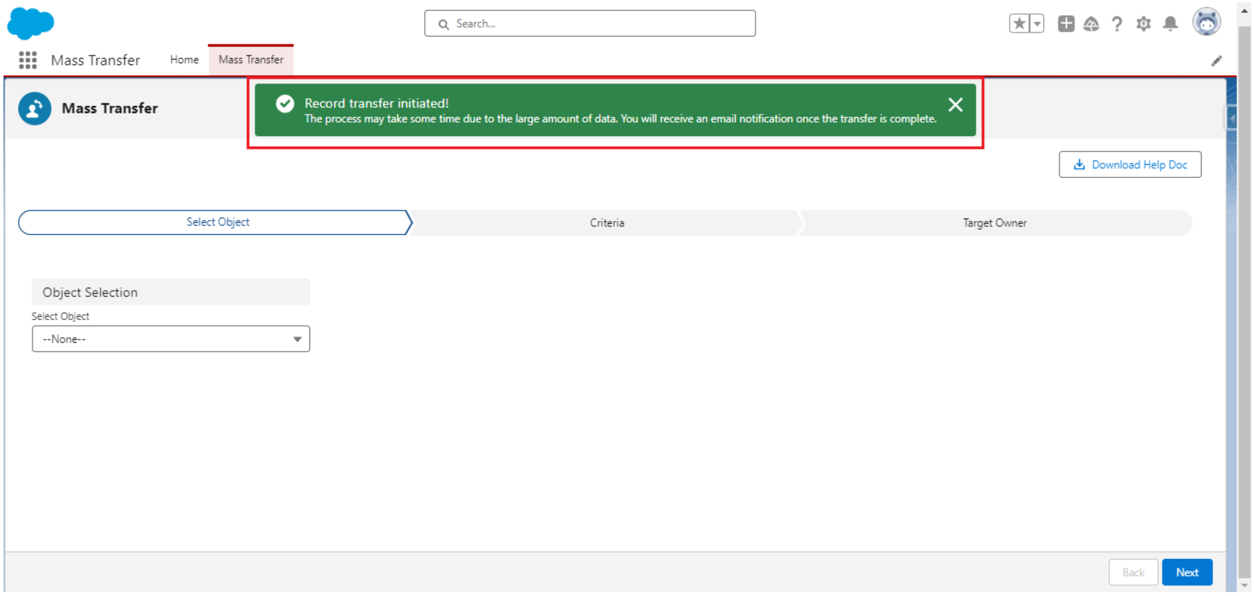
Step5: When we click on next the below page will be opened and there, we can select the **New Owner** as *Amelia Grace* and click on Transfer Record



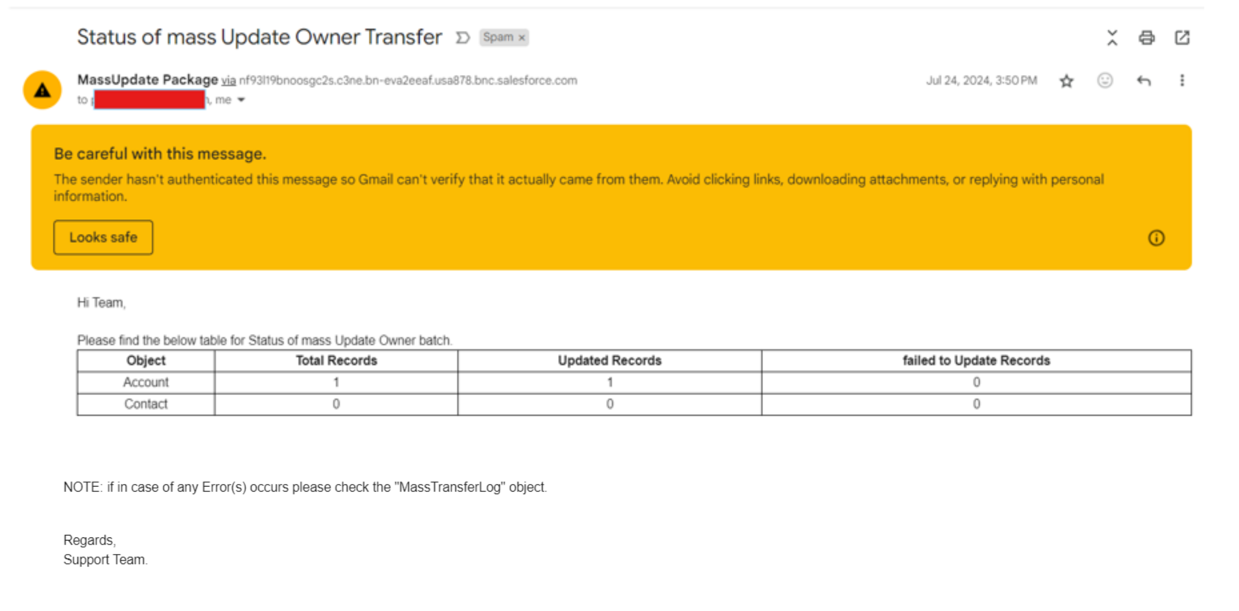
Step6: It will be showing the below message and if we click on “**ok**”



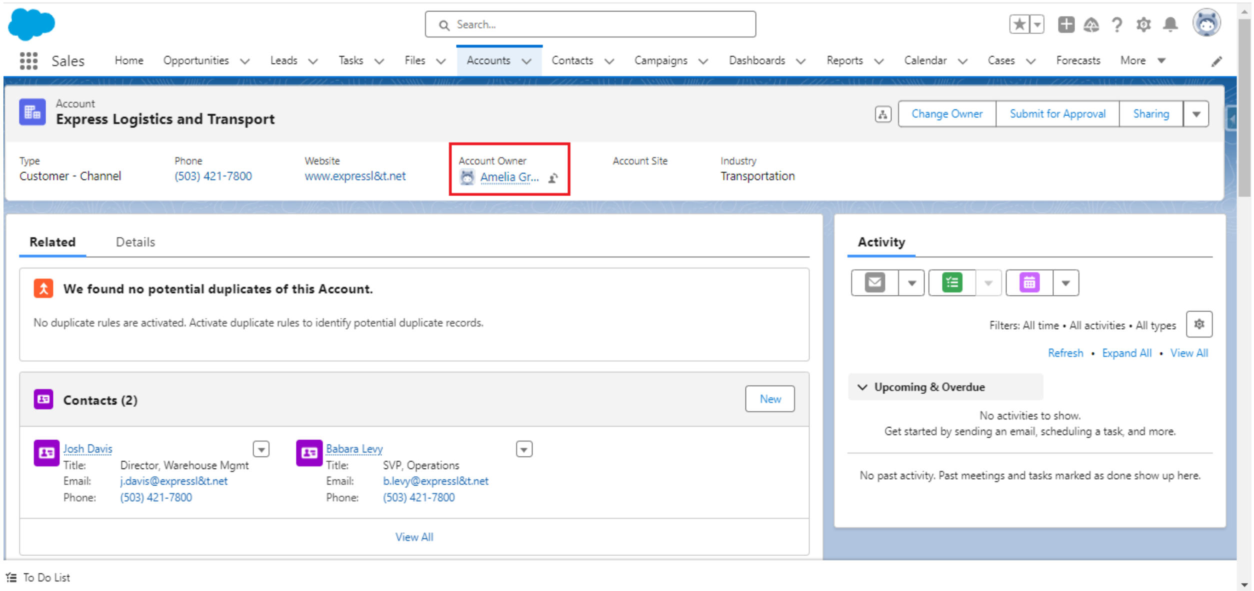
Step7: The records transferred initiated message will be displayed



Step8: Once the record is transferred the user who initiated the transfer will get an email notification



Step9: Express Logistics and transport record got transferred to Amelia Grace



USECASE FOR CRITERIA BASED:

Updating Record Ownership Using Criteria-Based Transfer

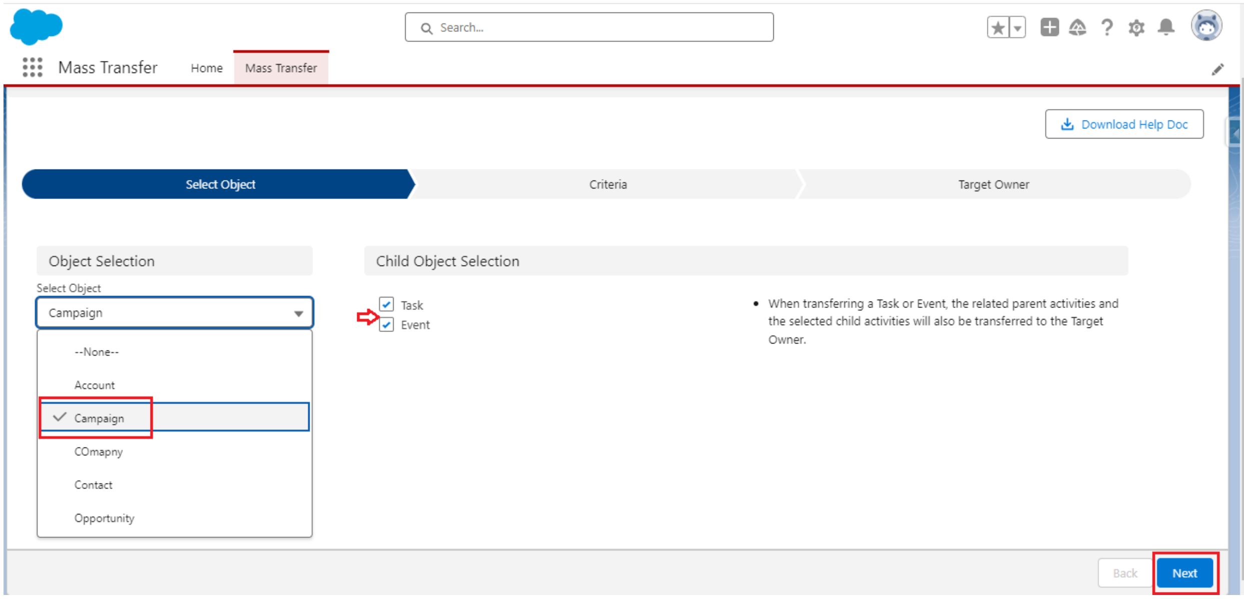
- Ensure that a Campaign meets specific criteria based on the status and activity of its child Task and Event objects.

SCENARIO:

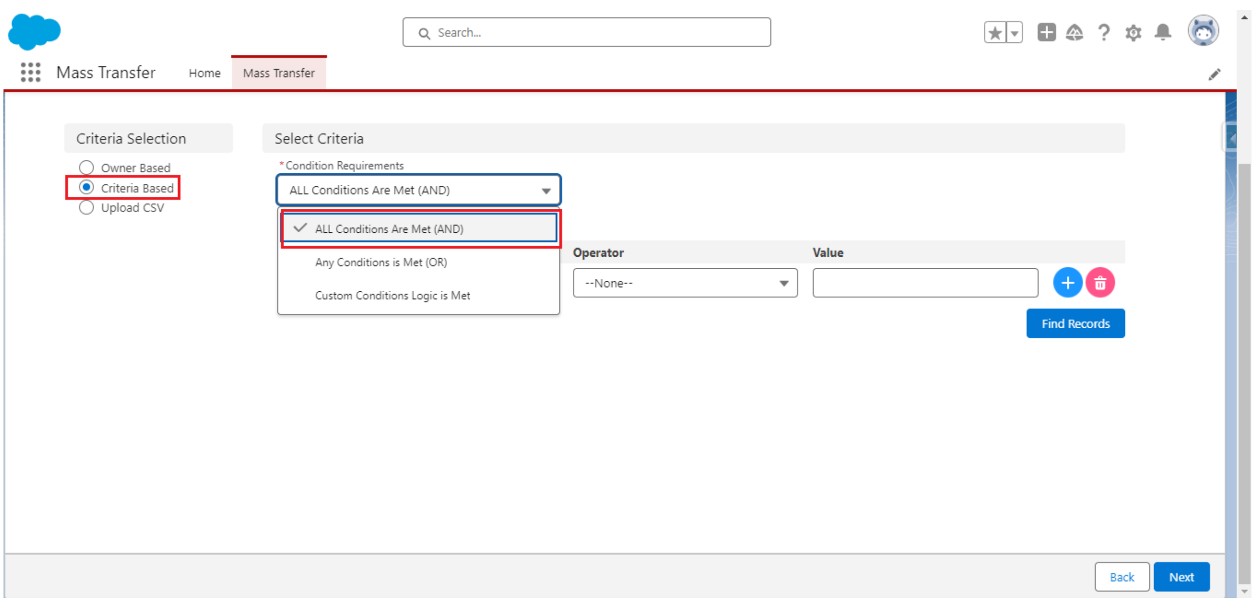
The manager runs a report in Salesforce to find all campaigns with the status set to "Completed." This ensures that only campaigns that have finished all activities are included in the report and only that record needs to be transferred.

Steps for Transferring records based on criteria:

Step1: Select ***Campaign*** from **select object** drop down and select as ***Task*** and ***Event*** from **Child objects** drop down and click on **next**

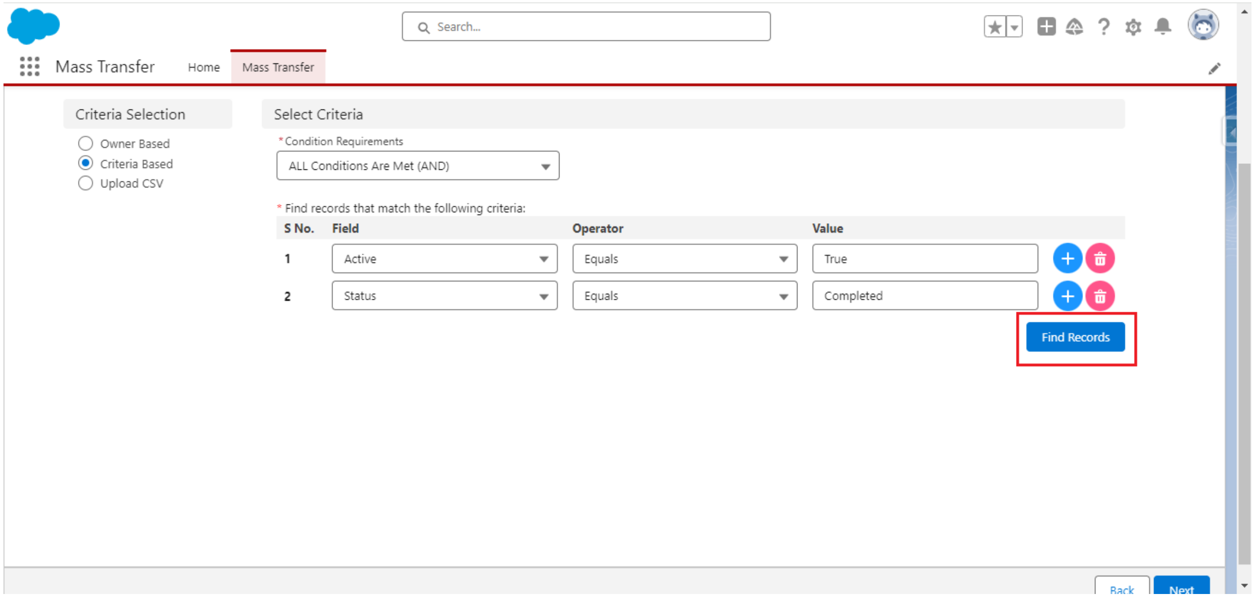


Step2: Select criteria Based radio button we can see the Condition Met drop down with three conditions AND,OR,Custom Condition. Based on requirement we can select the conditions

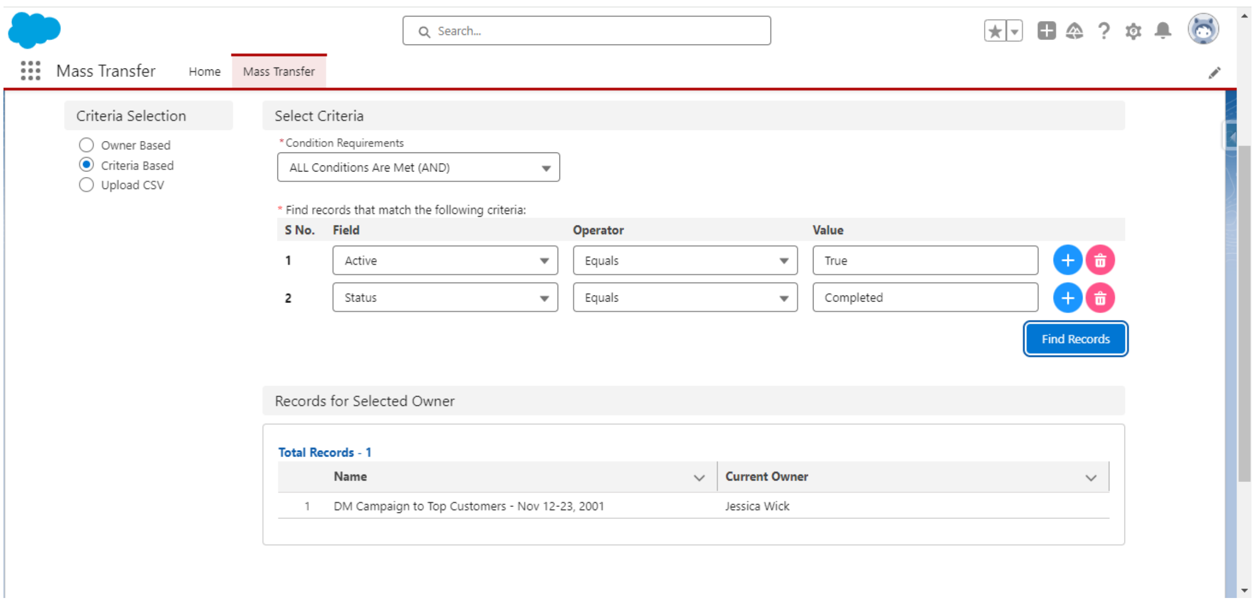


Step3:Please give the conditions as **Field** as **Active**, **operator** as **Equals** and **value** as **True**

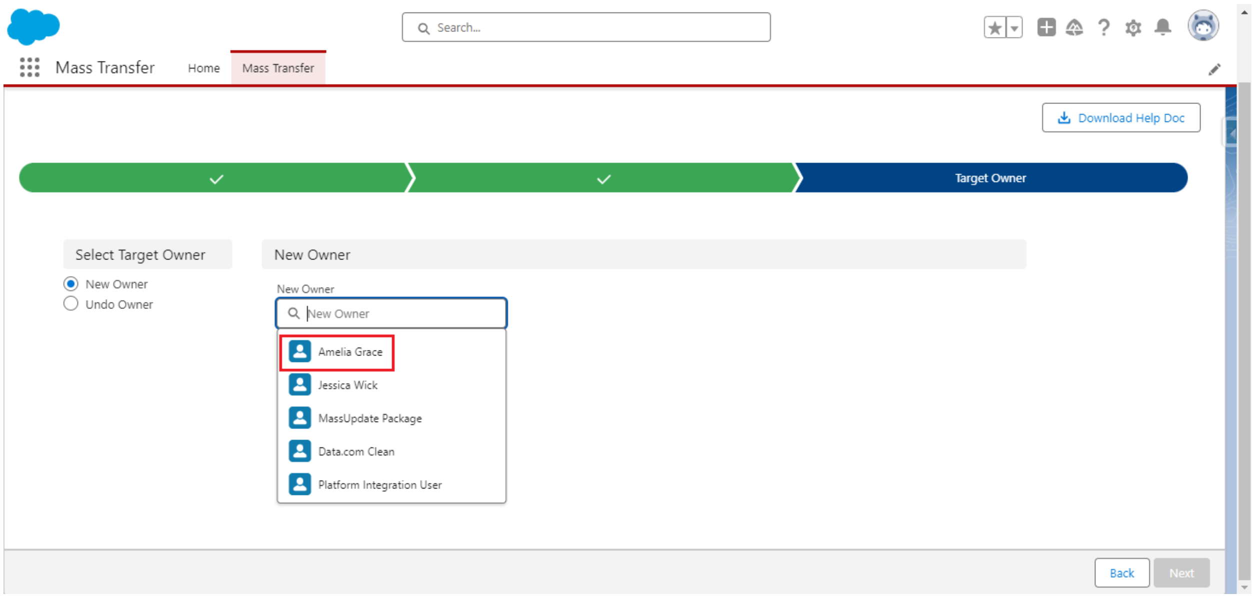
And for the second condition **field as status ,operator as Equals** and **Value as Completed** and then click on find records



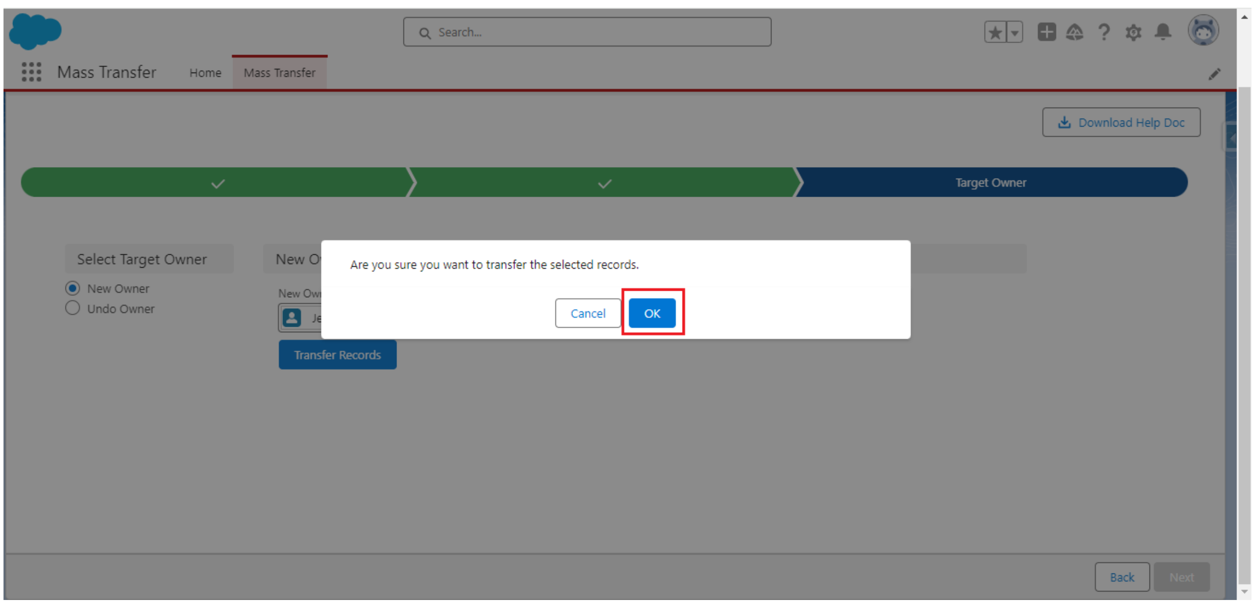
Step4:Here we are having only one record with current owner as Jessica Wick and click on Next



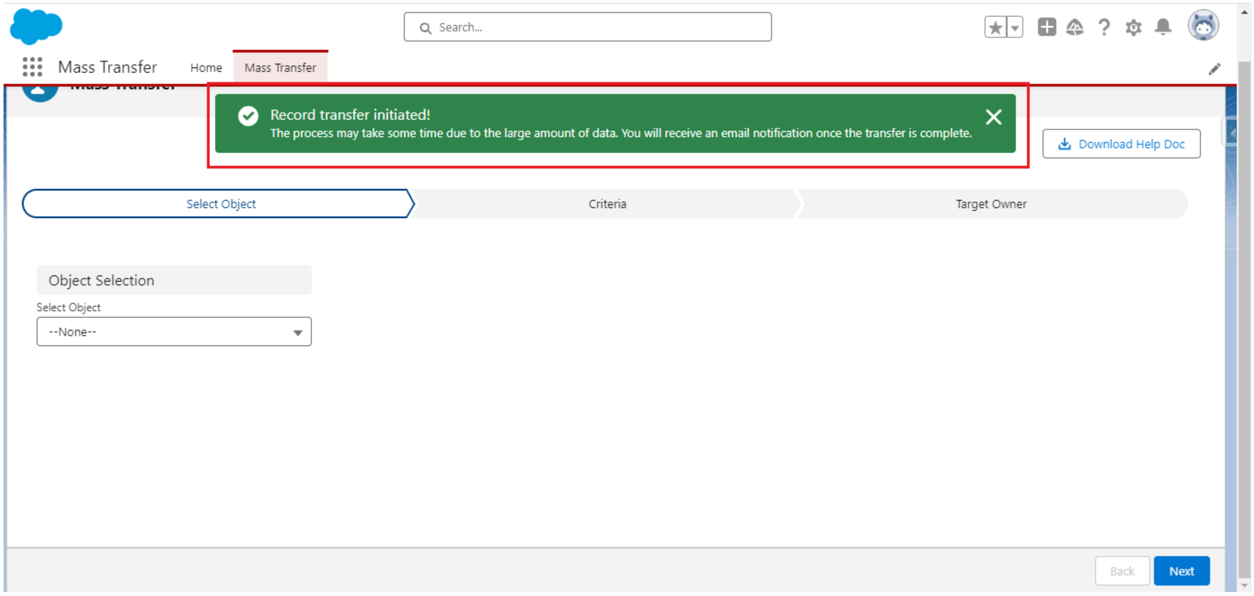
Step5: We are selecting **Amelia Grace** as a **new owner** and click **on transfer records**



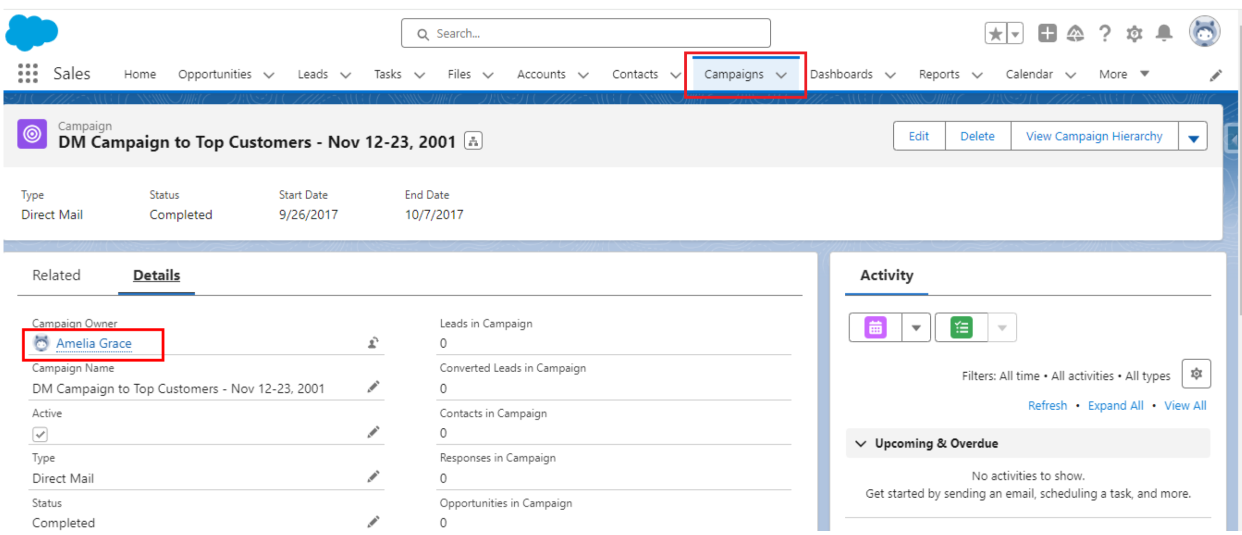
Step6:After selecting Transfer Records tab it will as for the confirmation .Click **Ok**



Step7:After selecting ok you will get a success message showing record transfer



Step8: The record is transferred to Amelia Grace



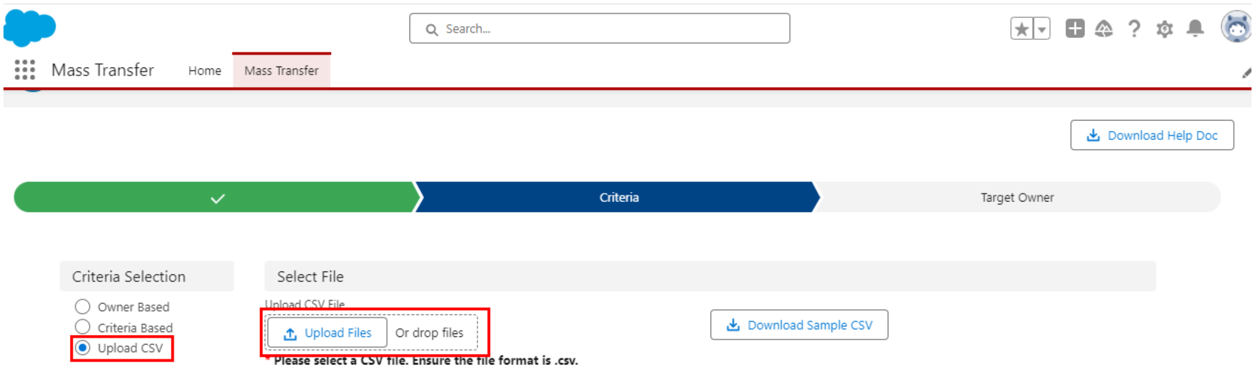
USECASE FOR UPLOAD CSV

SCENARIO:

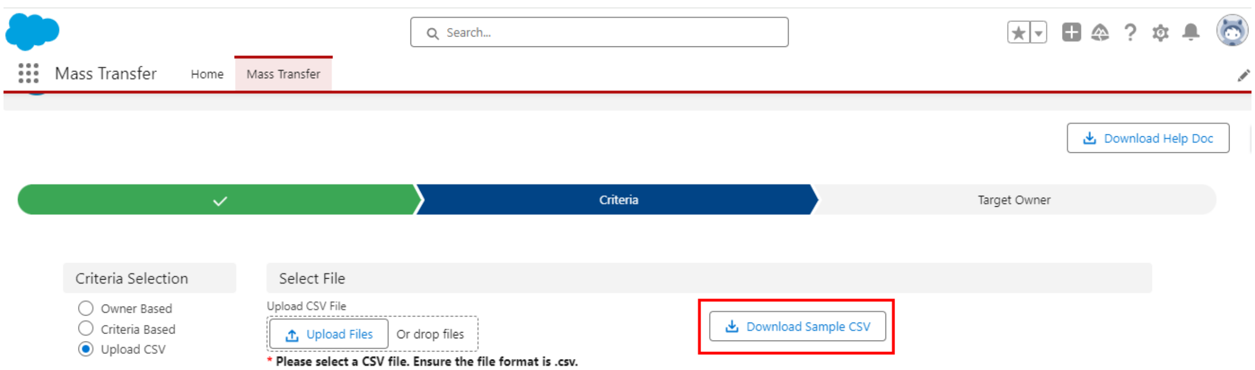
The Marketing Manager and Sales Operations Manager need to reassign ownership of all completed campaigns and their associated active tasks and events due to a restructuring. To manage this efficiently, they decide to use the CSV upload method in the Mass Transfer Tool.

Steps to transfer records by using upload csv

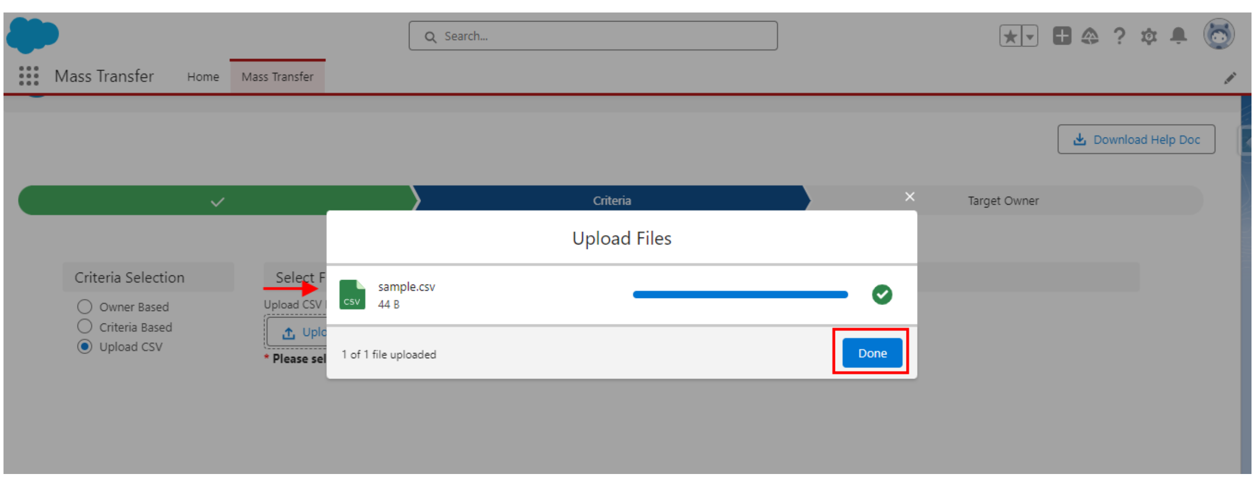
Step1:upload a CSV File format to transfer the records to the target owner



Step2:If we want to sample file we can click on "**Download Sample file**" sample file will be downloaded

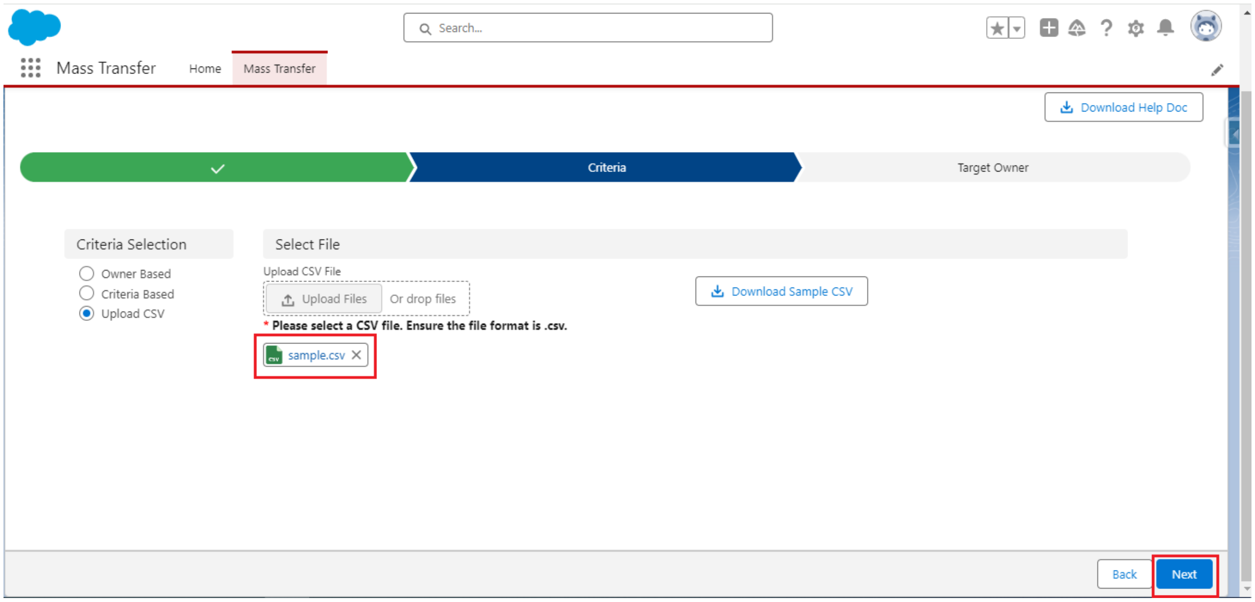


Step3:After adding a file it will prompt us a confirmation message

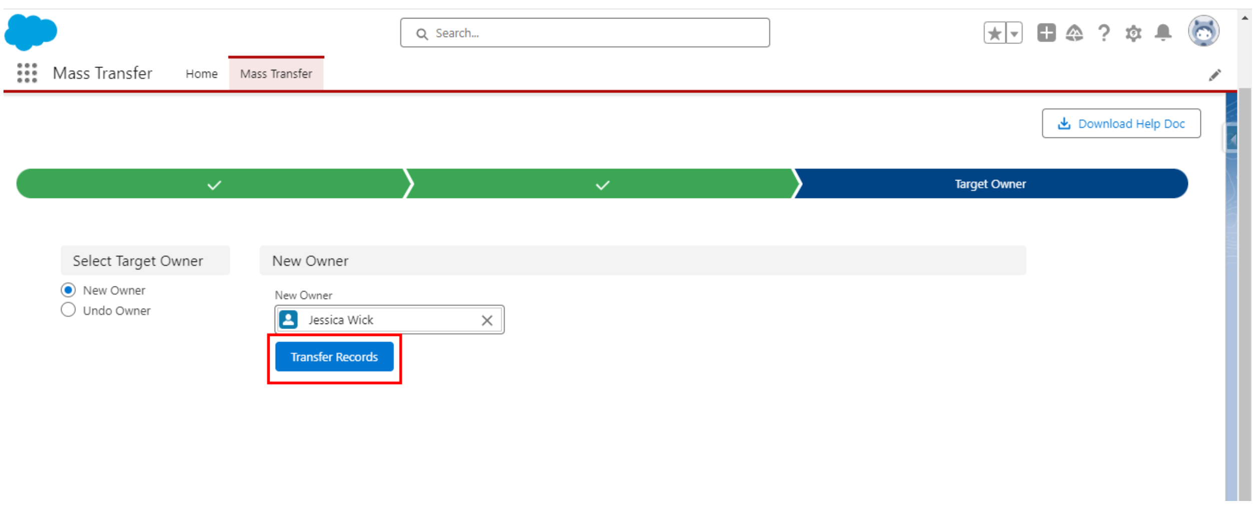


Step4: We can see the uploaded file as shown below

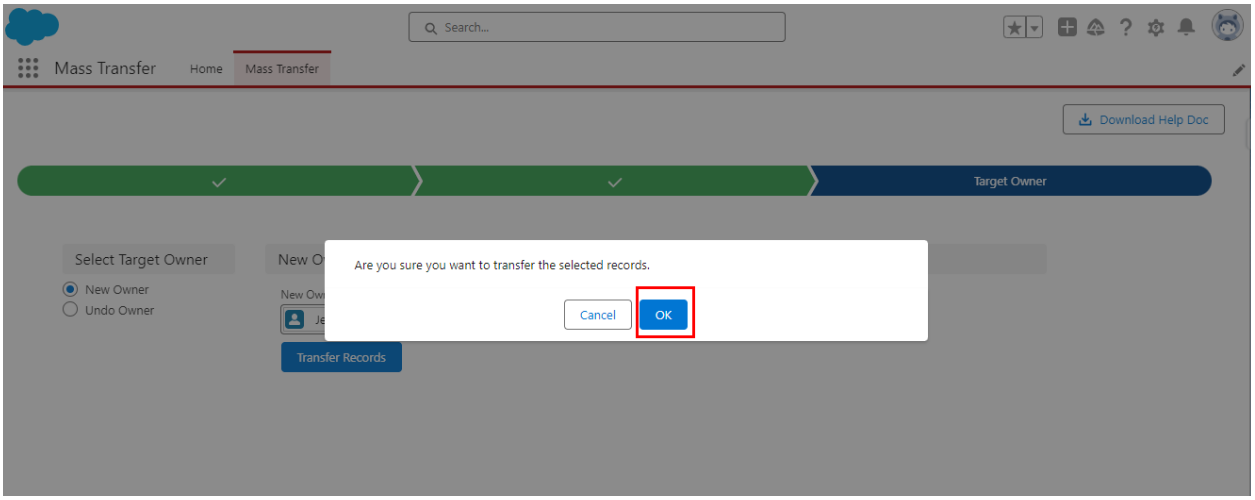
If we want to change or delete the file, click on **'x'** mark beside the file



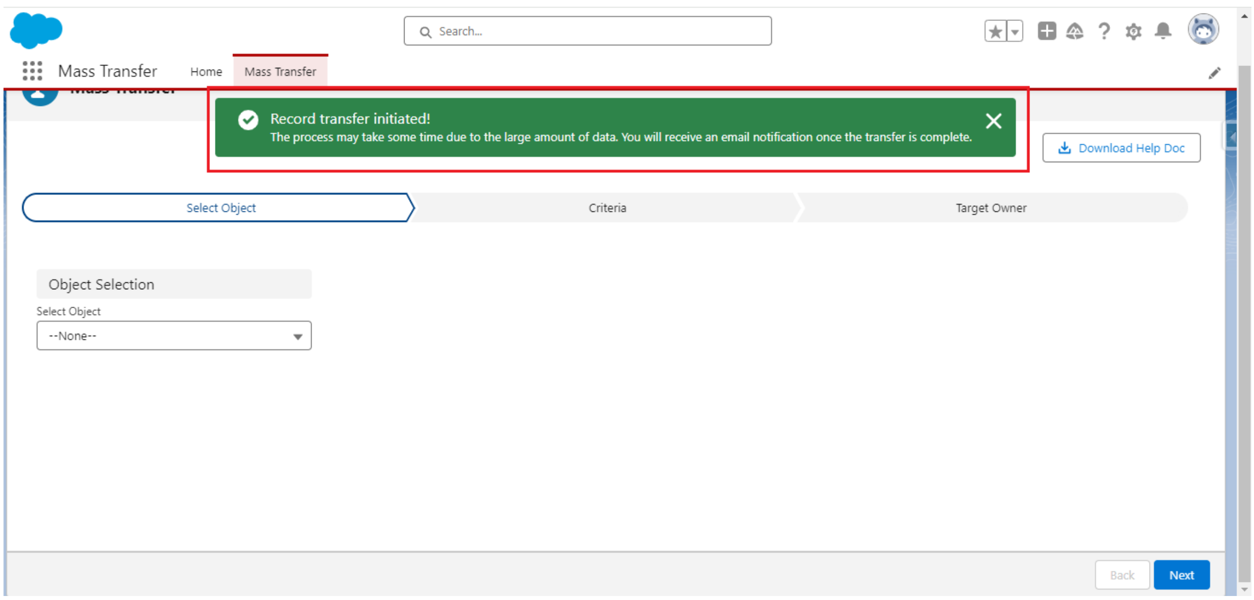
Step5: Click on **Next** to select the owner for whom we want to transfer and click on **TransferRecords**



Step6: Prompt message will be displayed so click on ok



Step6: On clicking on ok success message will be displayed



Step7: Email notification will be sent to user who has initiated the transfer

USER PERSONA:

Let us consider if a HR Manager needs to reassign sales records during team restructuring HR Manager working with the Sales Manager, she ensures that customer relationships and sales opportunities transition seamlessly to new team members, minimizing disruption by using mass transfer tool.

KNOWN LIMITATION:

The Mass Transfer Tool currently allows users to transfer ownership of up to 50,000 records using a CSV upload. In an upcoming release, we plan to introduce the ability to handle even larger volumes, enabling seamless bulk record transfers.