



MoveEase

Asset movement made easy!

*User Manual to install app for Salesforce CRM users to transfer assets from
one account to another account.*

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About MoveEase

MoveEase is used to transfer asset records from one account to another account.

MoveEase app is used in scenarios where merger or acquisitions of customer accounts happen and any other scenarios that require assets to be transferred. Users are provided the ability to manually select and transfer the asset from one account to another. Asset record values will remain as is post transfer to the target account.

Pre-requisites

You should have **Salesforce CPQ & Service Cloud** for Salesforce CPQ Packages pre-installed in your salesforce org.

How to Download the App

Installation of MoveEase App from Salesforce App Exchange.

Connect Your Salesforce Account to Your Trailblazer.me Profile

- 1.1. In a new browser tab, open **AppExchange**.
- 1.2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.
- 1.3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect**.
- 1.4. If you see the Choose a Username page, click **Log In with a Different Username**. If you see a login page, skip to the next step.
- 1.5. Enter your Salesforce username and password, then click **Log In**.
- 1.6. Click on **Link Account**.

Steps to Install Application to Salesforce Org-

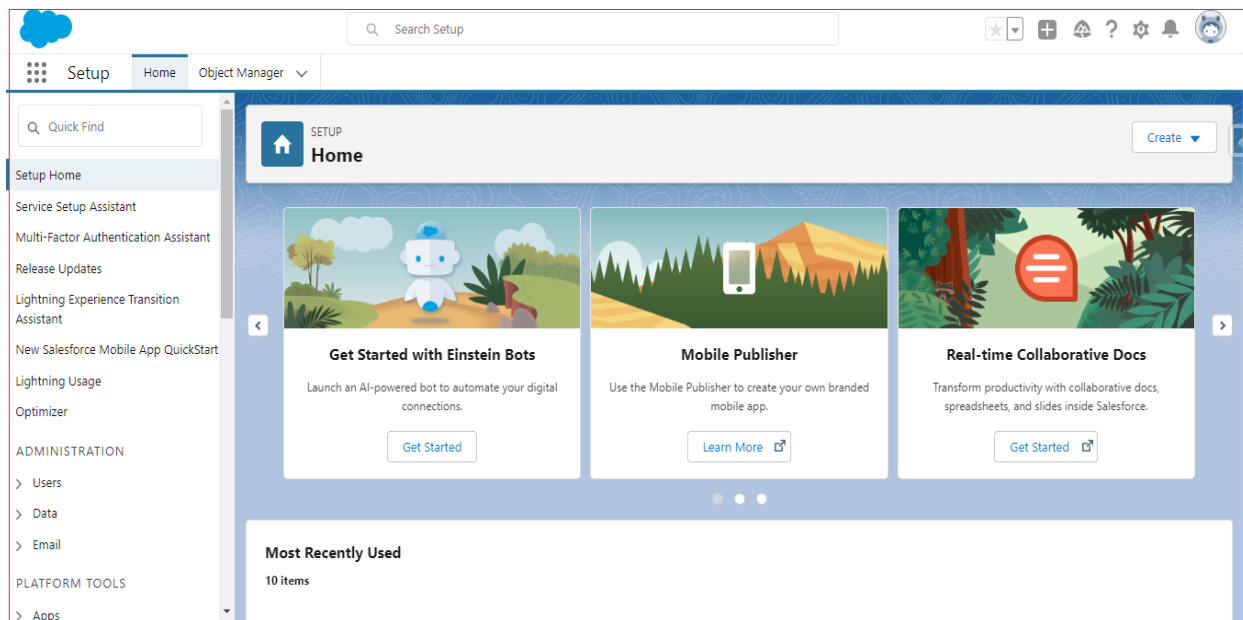
- 2.1. In a new browser tab, open **AppExchange**.
- 2.2. Search for **MoveEase**.
- 2.3. Click on **Apply Filters** button and choose Solution type as Apps to narrow down search result.
- 2.4. Click on the **MoveEase** App Name.
- 2.5. Now click on **Get it Now** button.
- 2.6. You will see 2 options **Install in Production** and **Install in Sandbox**.
- 2.7. In Install in Production, you will see all the connected salesforce accounts.

- 2.8. If you cannot find the username for the account in which you want to install, then check **Connect Your Salesforce Account to Your Trailblazer.me Profile** i.e. section **Error! Reference source not found.**
- 2.9. Choose the username and click Install in Production.
- 2.10. You will see a page where you can confirm your details.
- 2.11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to terms and conditions.
- 2.12. Click on **Confirm and Install**, it will take you to the login screen.
- 2.13. If you want to Install in Sandbox then click on **install in Sandbox** button.
- 2.14. You will see a page where you can confirm your details.
- 2.15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agreed to the terms and conditions.
- 2.16. Click on **Confirm and Install** it will take you to the login screen.
- 2.17. Provide your login credentials and select for which users you want to install the application.
- 2.18. After that application installation will start.

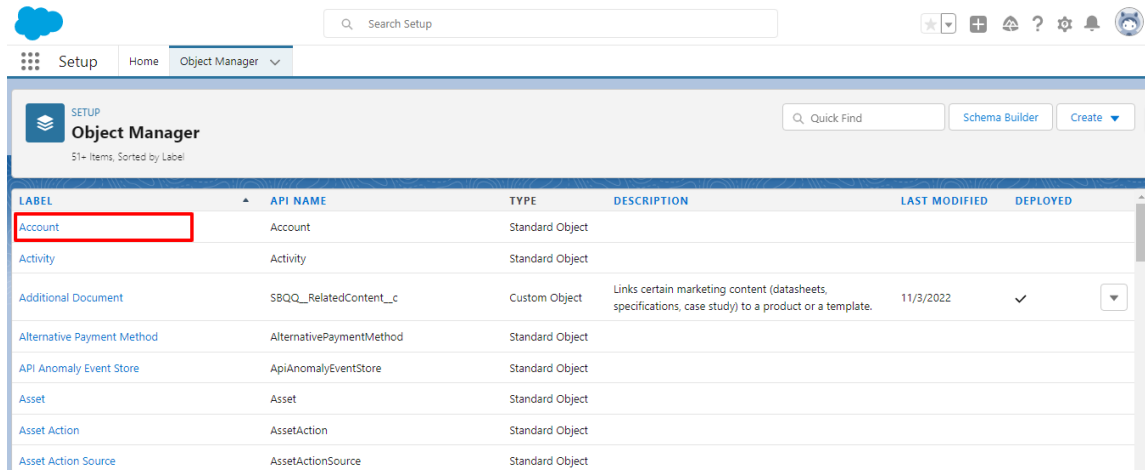
***We strongly recommend not to use any file that you receive from any unauthorized source or any source not mentioned above.**

How to add Asset Transfer button

1. Click , and select Setup.



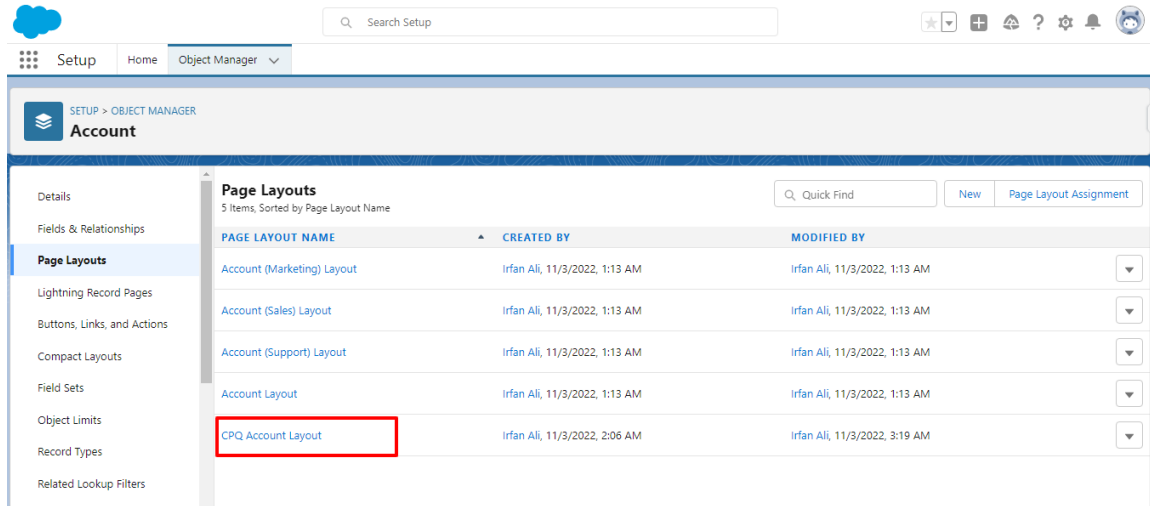
2. Select Object Manager and Enter "Account" in the Quick Find box, and select "Account" Object.



The screenshot shows the ADVanz 101 Object Manager interface. At the top, there is a navigation bar with "Setup", "Home", and "Object Manager" (selected). Below this, the "Object Manager" section is displayed, featuring a "Quick Find" search box and a "Create" button. The main area contains a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "Account" object is highlighted in the table.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Additional Document	SBQQ_RelatedContent__c	Custom Object	Links certain marketing content (datasheets, specifications, case study) to a product or a template.	11/3/2022	✓
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			

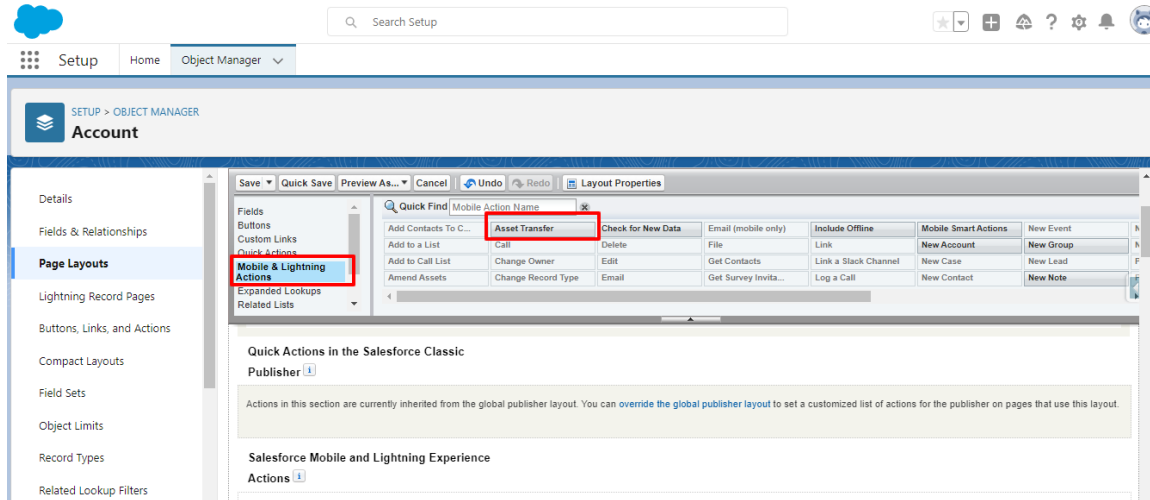
3. Click **Page Layouts** and open CPQ Account Layout Page Layout if you are using the default page layout for your Profiles. If you have created different page layout for your user then choose that one.



The screenshot shows the Salesforce Setup interface for the 'Account' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows a list of 5 items, sorted by Page Layout Name. The list includes the following data:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Account (Marketing) Layout	Irfan Ali, 11/3/2022, 1:13 AM	Irfan Ali, 11/3/2022, 1:13 AM	▼
Account (Sales) Layout	Irfan Ali, 11/3/2022, 1:13 AM	Irfan Ali, 11/3/2022, 1:13 AM	▼
Account (Support) Layout	Irfan Ali, 11/3/2022, 1:13 AM	Irfan Ali, 11/3/2022, 1:13 AM	▼
Account Layout	Irfan Ali, 11/3/2022, 1:13 AM	Irfan Ali, 11/3/2022, 1:13 AM	▼
CPQ Account Layout	Irfan Ali, 11/3/2022, 2:06 AM	Irfan Ali, 11/3/2022, 3:19 AM	▼

4. Click on “Mobile and Lightning Actions” search for “Asset Transfer” then drag and drop “Asset Transfer” under Salesforce Mobile & Lightning Experience section and Click Save.

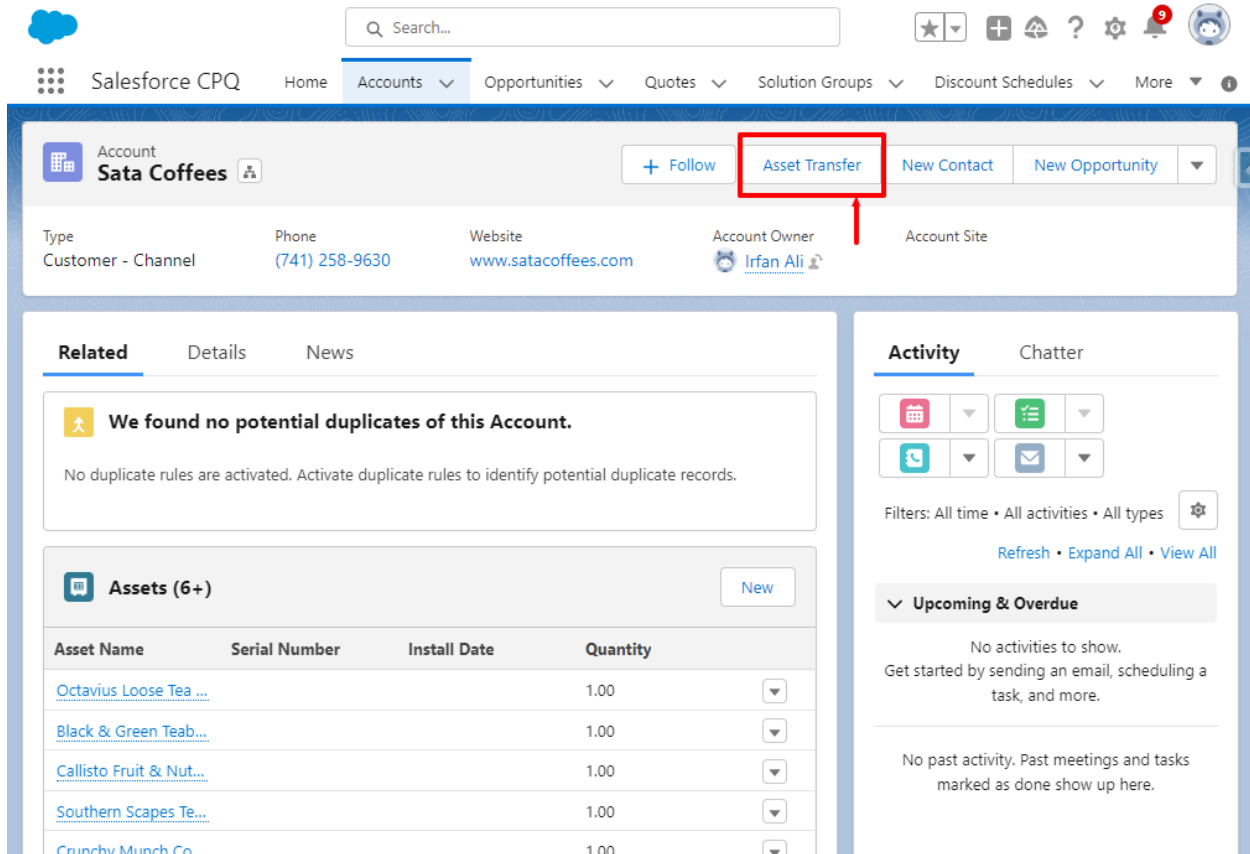


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'SETUP > OBJECT MANAGER Account'. It features a 'Quick Find' search bar and a table of actions. The 'Mobile & Lightning Actions' section is highlighted in the left sidebar. The table of actions includes the following items:

Quick Find	Mobile Action Name						
Add Contacts To C...	Asset Transfer	Check for New Data	Email (mobile only)	Include Offline	Mobile Smart Actions	New Event	
Add to a List	Call	Delete	File	Link	New Account	New Group	
Add to Call List	Change Owner	Edit	Get Contacts	Link a Slack Channel	New Case	New Lead	
Amend Assets	Change Record Type	Email	Get Survey Invita...	Log a Call	New Contact	New Note	

Below the table, there is a section titled 'Quick Actions in the Salesforce Classic Publisher' and another section titled 'Salesforce Mobile and Lightning Experience Actions'.

5. Now you can see "Asset Transfer" button on Account page.



The screenshot displays the Salesforce CPQ interface for an account named "Sata Coffees". The top navigation bar includes a search bar and various utility icons. Below the navigation bar, the account header shows the account name, a "Follow" button, and an "Asset Transfer" button, which is highlighted with a red box and a red arrow. The account details section includes fields for Type (Customer - Channel), Phone ((741) 258-9630), Website (www.satacoffees.com), Account Owner (Irfan Ali), and Account Site. The main content area is divided into two sections: "Related" and "Activity". The "Related" section shows a message about potential duplicates and a list of assets. The "Activity" section shows filters, a refresh button, and a section for "Upcoming & Overdue" activities.

Account Details:

- Account: Sata Coffees
- Type: Customer - Channel
- Phone: (741) 258-9630
- Website: www.satacoffees.com
- Account Owner: Irfan Ali
- Account Site:

Related Section:

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Assets (6+)

Asset Name	Serial Number	Install Date	Quantity
Octavius Loose Tea ...			1.00
Black & Green Teab...			1.00
Callisto Fruit & Nut...			1.00
Southern Scapes Te...			1.00
Crunchy Munch Co...			1.00

Activity Section:

Filters: All time • All activities • All types

Refresh • Expand All • View All

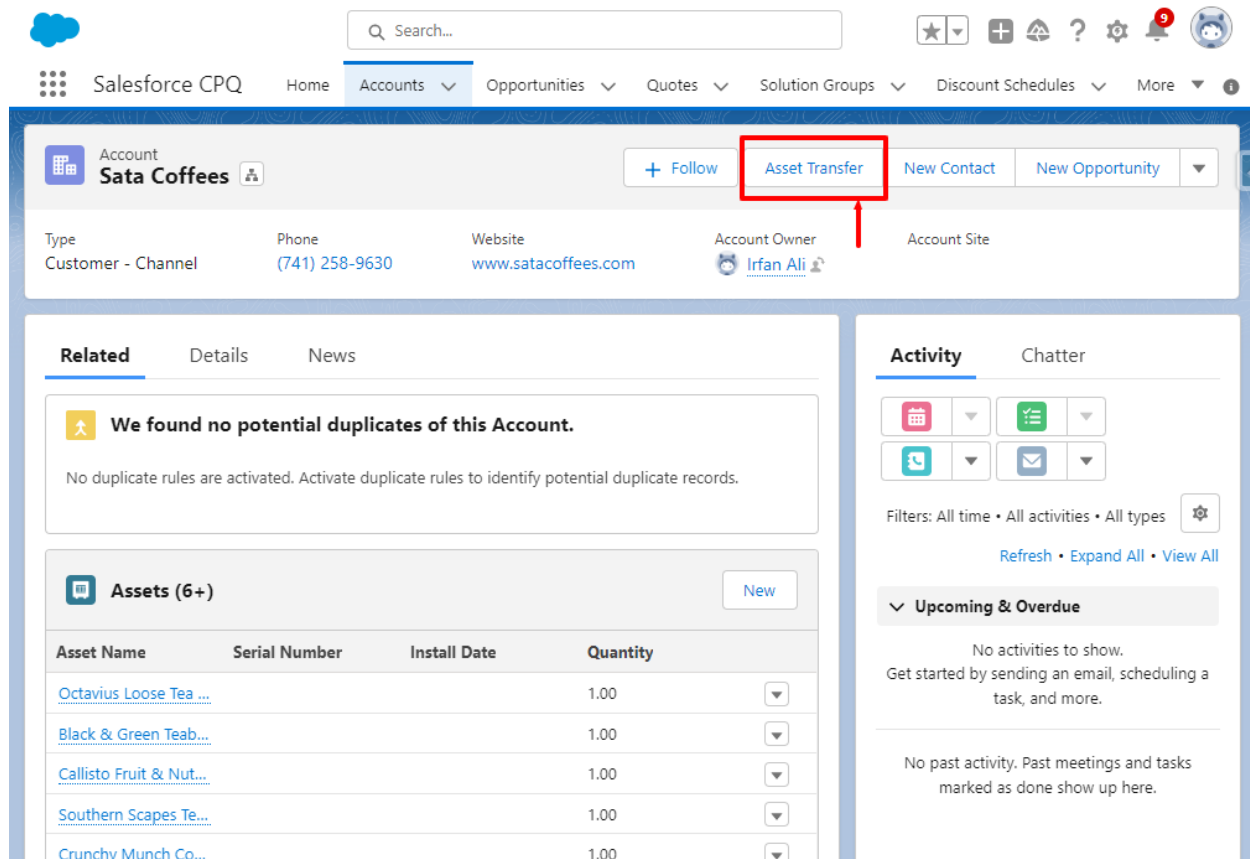
Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

How Asset Transfer works in MoveEase

1. Post completion of steps mentioned in "How to add asset transfer button", open an already existing account having multiple assets and click on **Asset Transfer** button.



The screenshot displays the Salesforce CPQ interface for an account named 'Sata Coffees'. The 'Asset Transfer' button is highlighted with a red box and a red arrow. The interface includes a search bar, navigation tabs (Home, Accounts, Opportunities, Quotes, Solution Groups, Discount Schedules, More), and a sidebar with 'Related' and 'Activity' sections. The 'Assets' section shows a table with columns: Asset Name, Serial Number, Install Date, and Quantity. The 'Activity' section shows filters and a list of activities.

Account: Sata Coffees

Buttons: + Follow, Asset Transfer, New Contact, New Opportunity

Account Information:

- Type: Customer - Channel
- Phone: (741) 258-9630
- Website: www.satacoffees.com
- Account Owner: Irfan Ali
- Account Site:

Related: Details, News

We found no potential duplicates of this Account.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Assets (6+) [New]

Asset Name	Serial Number	Install Date	Quantity
Octavius Loose Tea ...			1.00
Black & Green Teab...			1.00
Callisto Fruit & Nut...			1.00
Southern Scapes Te...			1.00
Crunchy Munch Co...			1.00

Activity: Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

2. Post step one, new window will open, here user selects Asset records to be transferred.



Home Accounts Opportunities Quotes Solution Groups Discount Schedules More



ACCOUNT
Sata Coffees

Next Cancel Filter

Asset Selection

32 Assets Found

	☐	NAME	PRODUCT	SERIALNUMBER	QUANTITY	PRICE	STATUS
1	☐	✓ Premium Combo	Premium Combo		1	299	
2	☐	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
3	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
4	☐	Organic Chai Collection Set	Organic Chai Collection Set		1	0	
5	☐	Discover Exotic Tea Trunk	Discover Exotic Tea Trunk		1	0	
6	☐	Octavius Loose Tea Combo	Octavius Loose Tea Combo		1	0	
7	☐	✓ Premium Combo	Premium Combo		1	299	
8	☐	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
9	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
10	☐	Organic Chai Collection Set	Organic Chai Collection Set		1	0	

First Prev 1 2 3 4 Next Last

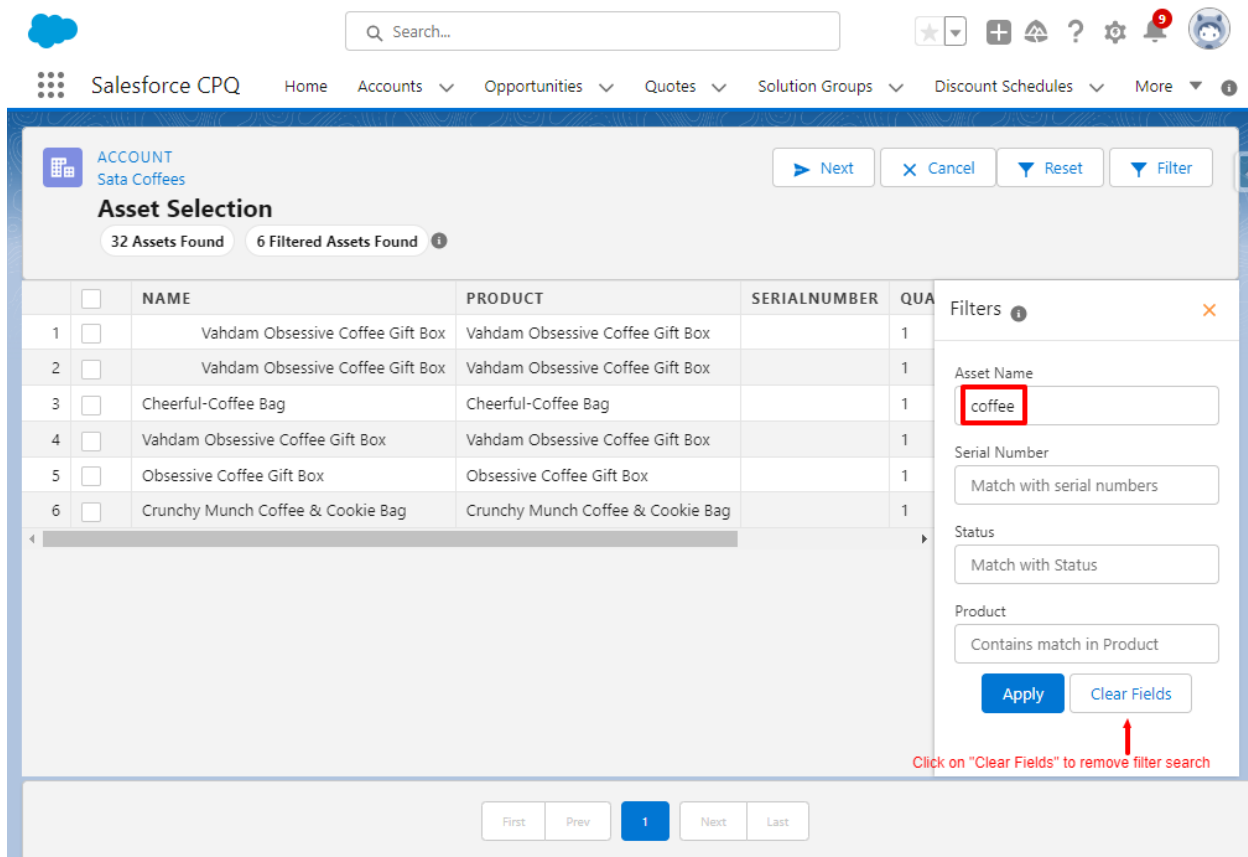
3. If user selects any Asset record which is a child of another product, then automatically all related bundled products including that parent product get selected and pop-up will be shown to user.

The screenshot displays the Salesforce CPQ 'Asset Selection' page for the 'Sata Coffees' account. A red box highlights a confirmation message: 'Selected bundle product! All related products of bundle are selected'. Below this, a table lists 10 assets. A red arrow points to the first 'Premium Combo' row, which has a dropdown arrow in its selection column. The table shows that selecting a parent product (Premium Combo) automatically selects its child products (Assorted Collection Cup of Tea, Vahdam Obsessive Coffee Gift Box, Organic Chai Collection Set, Discover Exotic Tea Trunk, and Octavius Loose Tea Combo).

	☐	NAME	PRODUCT	SERIALNUMBER	QUANTITY	PRICE	STATUS
1	☒	☒ Premium Combo	Premium Combo		1	299	
2	☒	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
3	☒	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
4	☒	Organic Chai Collection Set	Organic Chai Collection Set		1	0	
5	☒	Discover Exotic Tea Trunk	Discover Exotic Tea Trunk		1	0	
6	☒	Octavius Loose Tea Combo	Octavius Loose Tea Combo		1	0	
7	☐	☒ Premium Combo	Premium Combo		1	299	
8	☐	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
9	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
10	☐	Organic Chai Collection Set	Organic Chai Collection Set		1	0	

Arrow in front of Asset Name shows that this is parent product and its child product listed below (If you select any one of them all related assets gets auto selected & popup is shown)

4. For convenience in selection user can also use filter functionality to choose the Asset record from the available list. The available filters are Asset Name, Serial Number, Status, Product.



The screenshot shows the Salesforce CPQ interface for the 'Sata Coffees' account. The 'Asset Selection' section displays a table with 6 filtered assets out of 32 found. The table columns are NAME, PRODUCT, SERIALNUMBER, and QUANTITY. A filter sidebar is open on the right, showing filters for Asset Name (with 'coffee' entered), Serial Number, Status, and Product. The 'Clear Fields' button in the filter sidebar is highlighted with a red arrow and a red text label.

Asset Selection
32 Assets Found 6 Filtered Assets Found

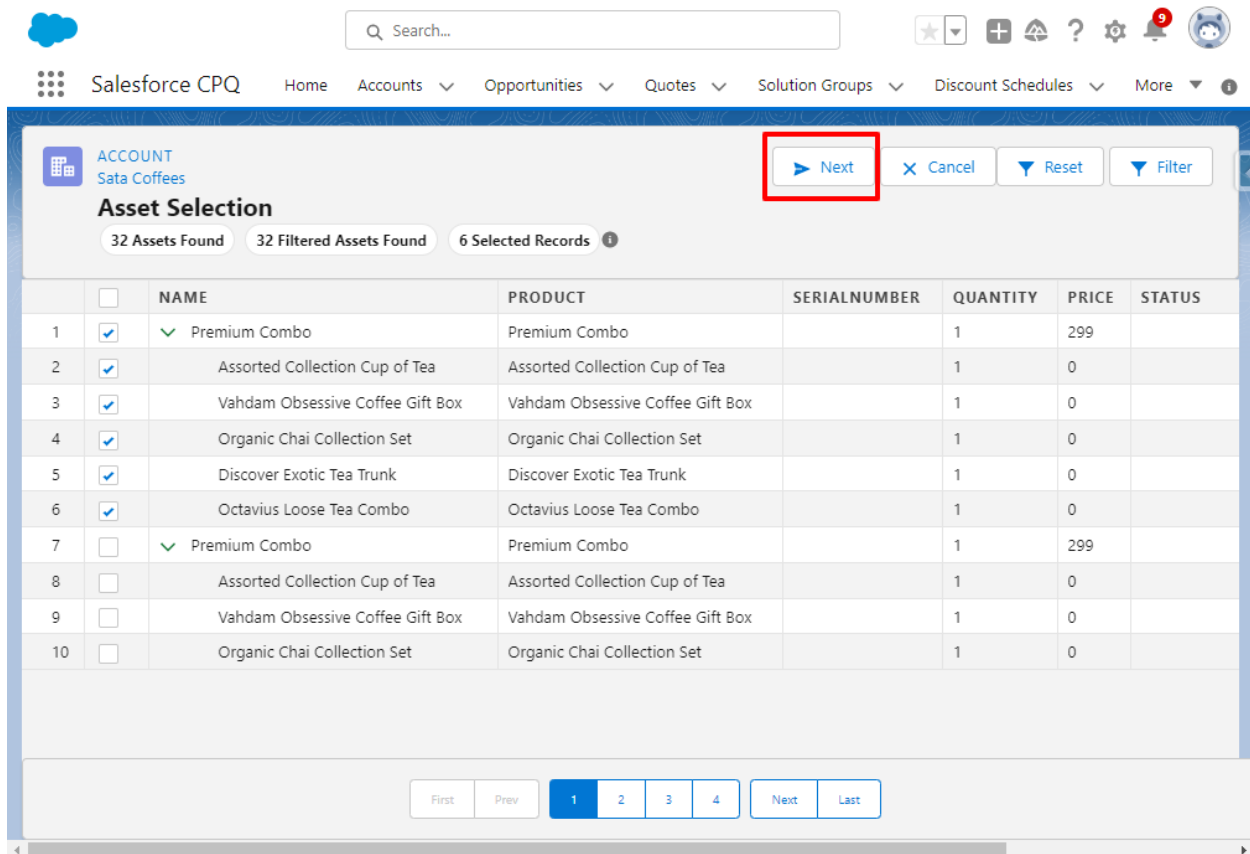
	☐	NAME	PRODUCT	SERIALNUMBER	QUANTITY
1	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1
2	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1
3	☐	Cheerful-Coffee Bag	Cheerful-Coffee Bag		1
4	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1
5	☐	Obsessive Coffee Gift Box	Obsessive Coffee Gift Box		1
6	☐	Crunchy Munch Coffee & Cookie Bag	Crunchy Munch Coffee & Cookie Bag		1

Filters

- Asset Name:
- Serial Number:
- Status:
- Product:

Click on "Clear Fields" to remove filter search

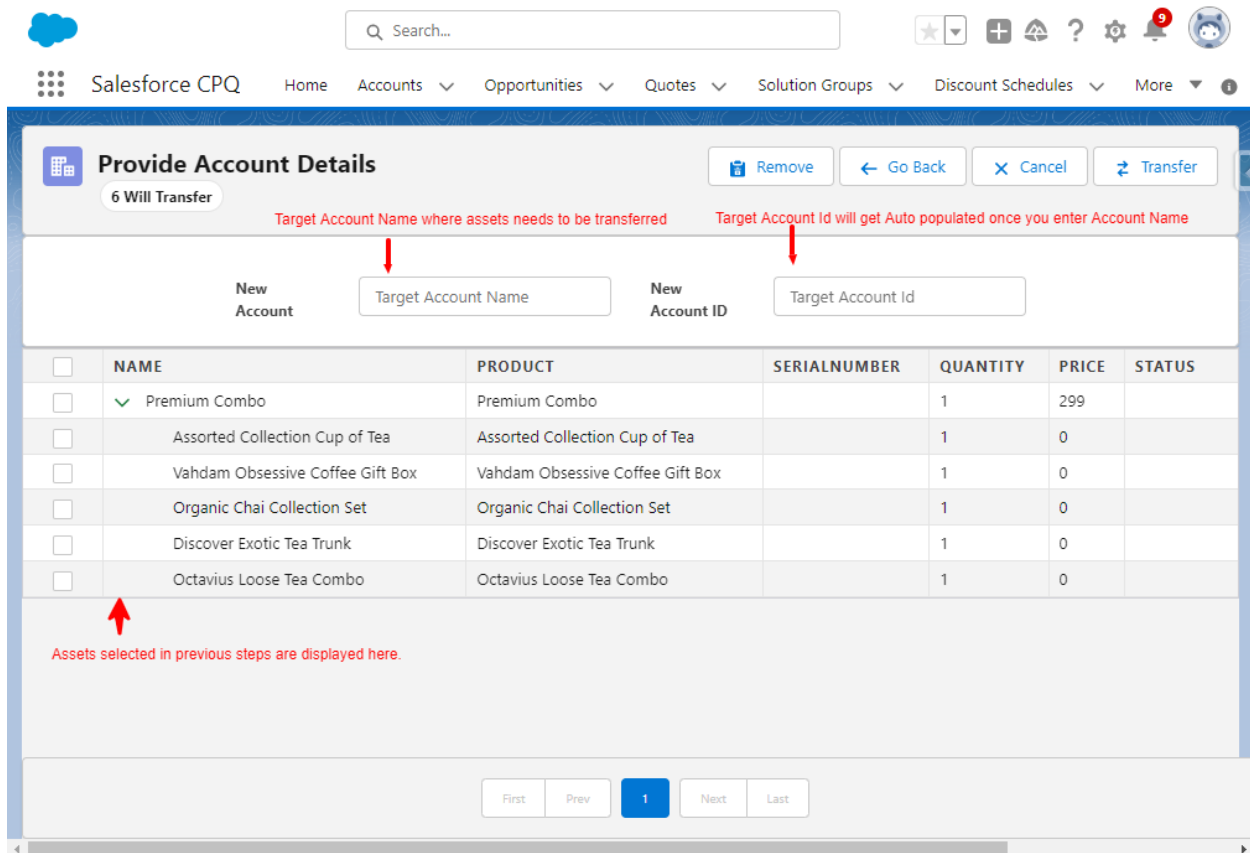
5. After selecting Assets to be transferred user can click on the “Next” button to proceed with further steps.



The screenshot shows the Salesforce CPQ interface for the 'Sata Coffees' account. The 'Asset Selection' section displays a table of assets with columns: NAME, PRODUCT, SERIALNUMBER, QUANTITY, PRICE, and STATUS. The table lists 10 assets, with the first 6 selected (checked) and the last 4 unselected. The 'Next' button is highlighted with a red box. The interface also includes a search bar, navigation tabs (Home, Accounts, Opportunities, Quotes, Solution Groups, Discount Schedules, More), and a pagination bar at the bottom.

	☐	NAME	PRODUCT	SERIALNUMBER	QUANTITY	PRICE	STATUS
1	☒	✓ Premium Combo	Premium Combo		1	299	
2	☒	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
3	☒	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
4	☒	Organic Chai Collection Set	Organic Chai Collection Set		1	0	
5	☒	Discover Exotic Tea Trunk	Discover Exotic Tea Trunk		1	0	
6	☒	Octavius Loose Tea Combo	Octavius Loose Tea Combo		1	0	
7	☐	✓ Premium Combo	Premium Combo		1	299	
8	☐	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
9	☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
10	☐	Organic Chai Collection Set	Organic Chai Collection Set		1	0	

6. Post clicking next button, new screen is visible. User can search for a target account to which asset will be transferred to by entering its name in “**New Account**” search box & select account name, after selecting the account that Account Id will be populated in “**New Account Id**” field.



Provide Account Details

6 Will Transfer

Target Account Name where assets needs to be transferred

Target Account Id will get Auto populated once you enter Account Name

New Account

Target Account Name

New Account ID

Target Account Id

	NAME	PRODUCT	SERIALNUMBER	QUANTITY	PRICE	STATUS
☒	Premium Combo	Premium Combo		1	299	
☐	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
☐	Organic Chai Collection Set	Organic Chai Collection Set		1	0	
☐	Discover Exotic Tea Trunk	Discover Exotic Tea Trunk		1	0	
☐	Octavius Loose Tea Combo	Octavius Loose Tea Combo		1	0	

Assets selected in previous steps are displayed here.

First Prev 1 Next Last

7. After step six user can click on the “**Transfer**” button after which all selected Assets will be transferred to that newly selected target Account.

Provide Account Details

6 Will Transfer

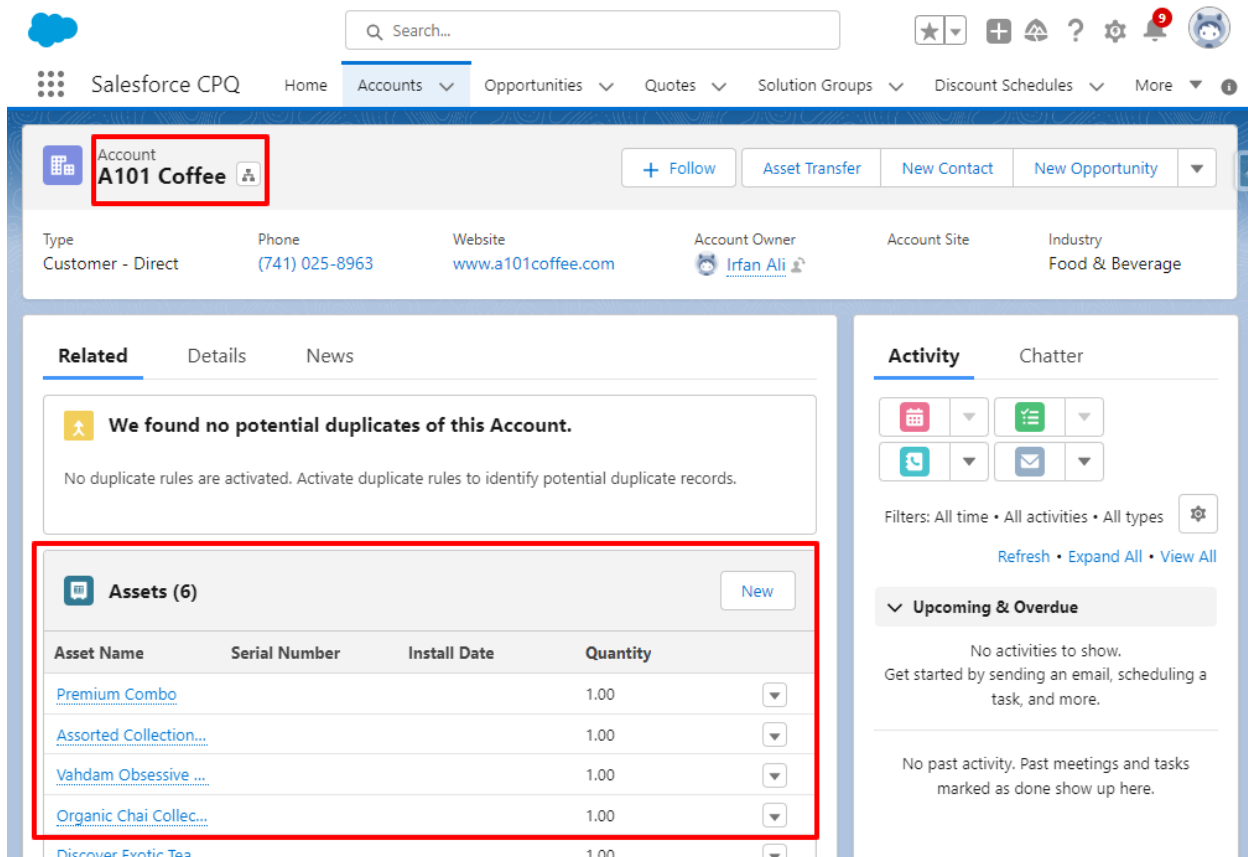
Remove Go Back Cancel **Transfer**

New Account: A101 Coffee New Account ID: 0015h00001GcfNIAAZ

	NAME	PRODUCT	SERIALNUMBER	QUANTITY	PRICE	STATUS
☐	✓ Premium Combo	Premium Combo		1	299	
☐	Assorted Collection Cup of Tea	Assorted Collection Cup of Tea		1	0	
☐	Vahdam Obsessive Coffee Gift Box	Vahdam Obsessive Coffee Gift Box		1	0	
☐	Organic Chai Collection Set	Organic Chai Collection Set		1	0	
☐	Discover Exotic Tea Trunk	Discover Exotic Tea Trunk		1	0	
☐	Octavius Loose Tea Combo	Octavius Loose Tea Combo		1	0	

First Prev 1 Next Last

8. Here, you can see the result of successful Asset transfer on the target **Account**. The transferred assets are visible under **Related tab** under Assets section.



Search...

Salesforce CPQ Home Accounts Opportunities Quotes Solution Groups Discount Schedules More

Account **A101 Coffee** + Follow Asset Transfer New Contact New Opportunity

Type: Customer - Direct Phone: (741) 025-8963 Website: www.a101coffee.com Account Owner: Irfan Ali Account Site: Industry: Food & Beverage

Related Details News

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Assets (6) New

Asset Name	Serial Number	Install Date	Quantity
Premium Combo			1.00
Assorted Collection...			1.00
Vahdam Obsessive ...			1.00
Organic Chai Collec...			1.00
Discover Exotic Tea ...			1.00

Activity Chatter

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Bundled Product Behavior during Transferring

If you have any bundled product in your Asset then the bundle relationship will not be broken after Asset Transfer, rather all of the bundled assets will either be shifted to the new account or remain in the same Master account, maintaining the Bundle relationship.

Other Apps by Advanz101

- **SplitEase**
Split Service Contract into multiple contracts manually to avoid large cart errors.
- **AutoSplit**
Split Service Contract into multiple contracts to avoid large cart errors.
- **MergeEase**
Merge multiple service contract.
- **PartEase**
User can select Contract Line Items available in Service Contract and Renew only selected Contract Line Items.
- **EaseQuotePDF**
Automate quote PDF generation on status change.
- **CaseAutoMail**
Transform case communication with CaseAutoMail.
- **AccountMerge**
Merge accounts and contacts with added functionality like smart filtering, previewing before merging and retaining critical data on merge.

Hope you find our MoveEase App useful. We would love to hear about our app from you. In case of any query or further clarification, please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVANZ101 Business Systems Inc. is a registered Salesforce partner providing best-in-class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us at info@advanz101.com