Ownership Transfer

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[Functional description 1](#_Toc118448038)

[Questions and answers 2](#_Toc118448039)

[Can I run the ownership transfer for more than one user at once? 2](#_Toc118448040)

[What if records cannot be updated? 3](#_Toc118448041)

[What is the maximum number of records that can be transferred? 3](#_Toc118448042)

[Page shows 2000 records to be transferred but the number of is bigger, is it correct? 3](#_Toc118448043)

[Technical description 3](#_Toc118448044)

[Configuration 3](#_Toc118448045)

[Can I modify the checkbox “Transfer to: Parked EU Accounts”? 3](#_Toc118448046)

[What if user cannot select the application Cision - Admin? 4](#_Toc118448047)

[How was it made? 4](#_Toc118448048)

[Challenges 4](#_Toc118448049)

[List of objects 4](#_Toc118448050)

# Functional description

The enhancement provides the screen to transfer the ownership of records between users.

The enhancement has been created to help with this frequent maintenance task.

Just select old and new user and click the button **Transfer**. All accounts, open opportunities, contacts, and open task will be transferred to new user.

Application *Cision – Admin* | Tab *Mass Update.*

A screenshot of a computer

Description automatically generated

There is no practical limit to the number of records to be transferred. If the number of records is significant, the transfer can take a moment. The screen shows the number of records to be processed and is refreshed every few seconds. Even if your prior transfer is still in progress you can proceed with another ownership transfer.

Graphical user interface, application

Description automatically generated

## Questions and answers

### Can I run the ownership transfer for more than one user at once?

**Question:** I need transfer **Owner 2** stuff into **Owner 3** and **Owner 1** stuff into **Owner 2**:

Owner 1 -> Owner 2 -> Owner 3

Can I run both transfers at the same time?

**Answer:** Yes, you can. Just remember to start first “Owner 2 -> Owner 3” and then “Owner 1 -> Owner 2”, not the other way. Once the button Transfer is clicked, the records for update are stored in temporal table MassUpdate\_\_c, you can call it the data snapshot. The data snapshot is made, and no further changes affect the data transfer scope in progress.

### What if records cannot be updated?

If records cannot be updated:

* Records in errors are displayed on the screen, mind column Error.
* The priority of such records is lowered so that bad records are not blocking other records.
* Once you eliminate the blocked (bad validation rule etc), you can click the button **Try update again** and reprocess the transfer.

Graphical user interface, text, application, email

Description automatically generated

### What is the maximum number of records that can be transferred?

10 000. If the number of records is bigger than 10 000 the error message will pop up on the screen.

### Page shows 2000 records to be transferred but the number of is bigger, is it correct?

Don’t worry about it, all the records are to be transferred, even in the number exceeds 2000.

The screen shows 2000 but in fact all records are transferred.

# Technical description

## Configuration

### Can I modify the checkbox “Transfer to: Parked EU Accounts”?

Sometimes you wish to move the accounts to inactive user. Inactive users cannot be selected in lookup, that is why this checkbox have been created.

Yes, you can change the label, owner and. You can also hide it.

Once the checkbox is selected you decree the new owner is an inactive user.

The ID of this inactive use is kept in Setup | custom labels | Name: InactiveOwnerId.

The label of the checkbox is kept in Setup | custom labels | Name: InactiveOwnerName.

### What if the user cannot select the application Cision - Admin?

1. Examine user profile.
2. Go to Setup | App Manager | Cision - Admin | Edit | User Profiles | Select the profile | Save
3. Add user profile to : Setup | Apex class: massUpdateClass | Security

Graphical user interface, application

Description automatically generated

## How was it made?

LWC components fills record into custom object MassUpdate\_\_c.

LWC runs batch processing (apex class massUpdateClass).

### Challenges

The challenge here is the batch processing and proper error handling.

### List of objects

|  |  |  |
| --- | --- | --- |
| Type | Name | Comments |
| LightningComponentBundle | massUpdate | Main LWC |
| LightningComponentBundle | lwcLookupComponent | orchestration |
| ApexClass | massUpdateClass | LWC orchestration  And batch processing |
| ApexClass | massUpdateClassTest |  |
| CustomObject | MassUpdate\_\_c | Records to process |
| CustomLabel | InactiveOwnerId | Configuration, can be blank |
| CustomLabel | InactiveOwnerName | Configuration, can be blank |
| CustomApplication | Cision\_Admin | Application |
| CustomTab | Mass\_Update | Tab |