

MPR Id 483343 (Reassign)

Problem Statement: Reassign all ongoing tasks for AXIS Bank to Aishwerya Srivastava in the system.

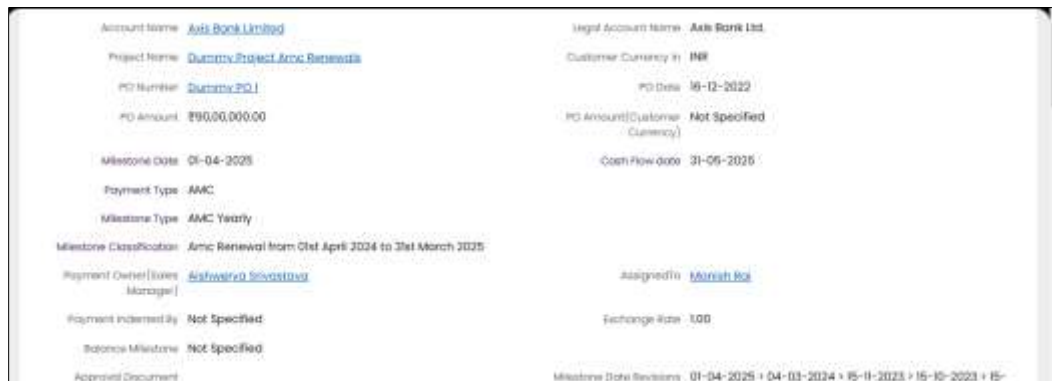
Please make sure All activities, opportunities, payment milestone, forecast call notes which were assigned to Vivek Sharma are reassigned to Aishwerya Srivastava.

Solution:

1. Extract the list of opportunities from OLI Master report.
2. Now select the Id and open the opportunity, edit it and change the Owner to Aishwerya save.



3. Similarly extract the list of payments from Payment view, edit it and change the Owner to Aishwerya save.



4. Similarly extract the list of activities in Forecast Notes view from Task object, edit it and change the Owner to Aishwerya save.

Axis Bank Limited (1)							
<input type="checkbox"/>	Archival and P...	Aishwerya Srivastava	14-08-2024	Not Specified	Open	Anand Ravi	Not Spc
<input type="checkbox"/>	Business Op...	Aishwerya Srivastava	14-08-2024	Not Specified	Open	Anand Ravi	Not Spc
<input type="checkbox"/>	Account Pa...	Aishwerya Srivastava	14-08-2024	10-08-2024	Open	Anand Ravi	Not Spc

5. This assignment can also be done using Mass Update or Import if there are many records.