

MPR Id 483343 (Reassign)

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

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

The screenshot shows the 'Create Opportunity' screen. At the top, there are buttons for 'Create New', 'Screen Flow Journey', 'Print', 'Close', 'Related Lists', and 'X'. The opportunity ID is 00044117, the name is 'Axis Bank - Archival and Purging', the owner is 'Aishwarya Srivastava', and the MS Score is 0%. Below this, there's a summary section for 'Axis Bank - Archival and Purging' with fields for Account (Axis Bank Limited), TCV (\$105,000.00), Total (\$105,000.00), and Weighted Value. To the right, there's a 'LAST MODIFIED ON' field (16-03-2024 10:41 AM) and a 'LAST MODIFIED BY' field (Owner Name). A progress bar indicates Average Progress at 100% with a caricature of a person running. On the far right, there's a 'Life Cycle' section with three steps: 1. Analysis, 2. Value Proposition, and 3. Proposal.

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

The screenshot shows the 'Payment' view screen. It displays various fields: Account Name (Axis Bank Limited), Project Name (Dummy Project Axis Srivastava), PO Number (Dummy PO.1), PO Amount (\$90,000,000.00), Milestone Date (01-04-2025), Payment Type (AMC), Milestone Type (AMC Yearly), Milestone Classification (AMC Renewal from 01st April 2024 to 31st March 2025), Payment Owner (Aishwarya Srivastava), Payment Due Date (31-05-2026), Open Flow date (31-05-2026), Customer Currency (INR), PO Date (16-12-2022), PO Amount (Customer Currency Not Specified), Assigned To (Manish Rao), Payment Interval (Not Specified), Exchange Rate (1.00), Balance Milestone (Not Specified), and Approved Document (Milestone Date Reviewers: 01-04-2025 > 04-03-2024 > 15-11-2023 > 15-10-2023).

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

The screenshot shows the 'Forecast Notes' view for 'Axis Bank Limited'. It lists three tasks:

- Archived - Aishwarya Srivastava, 14-08-2024, Not Specified, Open, Archived Note, Not Spec.
- Business Plan - Aishwarya Srivastava, 14-08-2024, Not Specified, Open, Archived Note, Not Spec.
- Account Plan - Aishwarya Srivastava, 14-08-2024, 10-08-2024, Open, Archived Note, Not Spec.

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