

## Custom Change Owner Function with Notification Email

### Technical Requirements:

- Create a new custom Object called Relationship

Ans-

The screenshot shows the 'Relationship' object configuration page in Salesforce. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and includes a description field, API Name (Relationship\_\_c), Custom checkbox (checked), Singular Label (Relationship), Plural Label (Relationships), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are in the top right.

- Create a new custom Object called Financial Account

Ans-

The screenshot shows the 'Financial Account' object configuration page in Salesforce. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and includes a description field, API Name (Financial\_Account\_\_c), Custom checkbox (checked), Singular Label (Financial Account), Plural Label (Financial Accounts), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are in the top right.

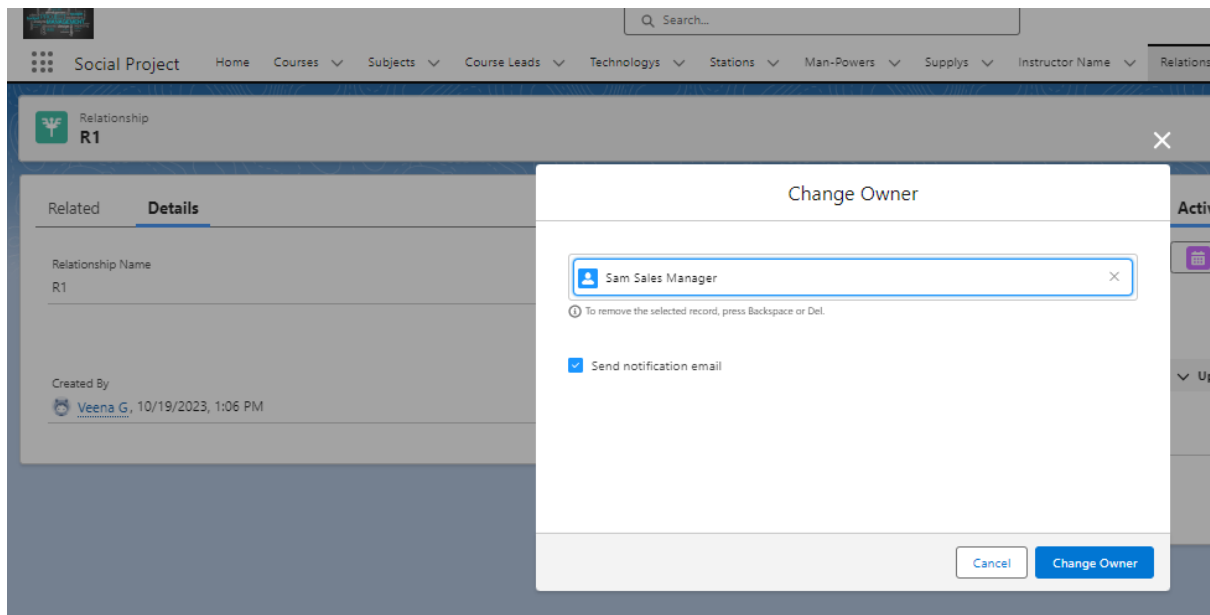
- Create a look-up relationship between Relationship (Parent) and Financial Account(Child)

Ans-

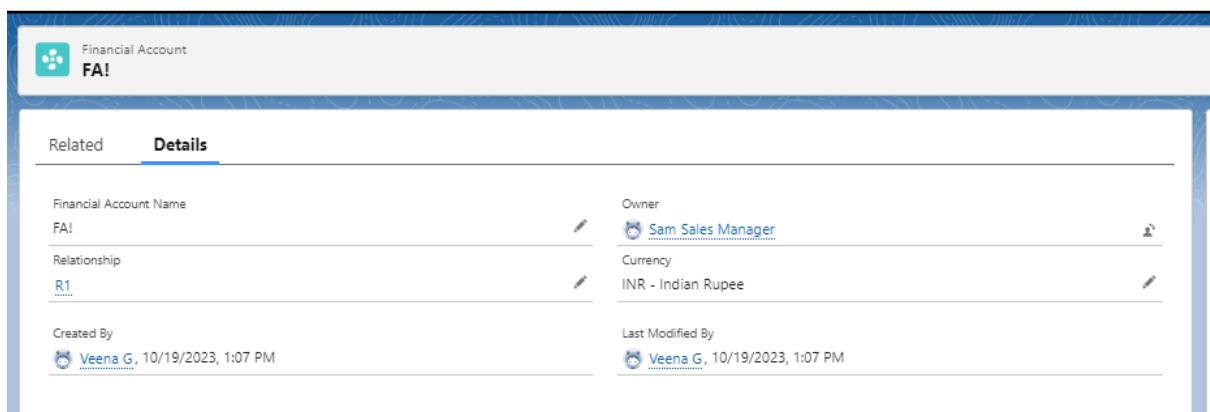
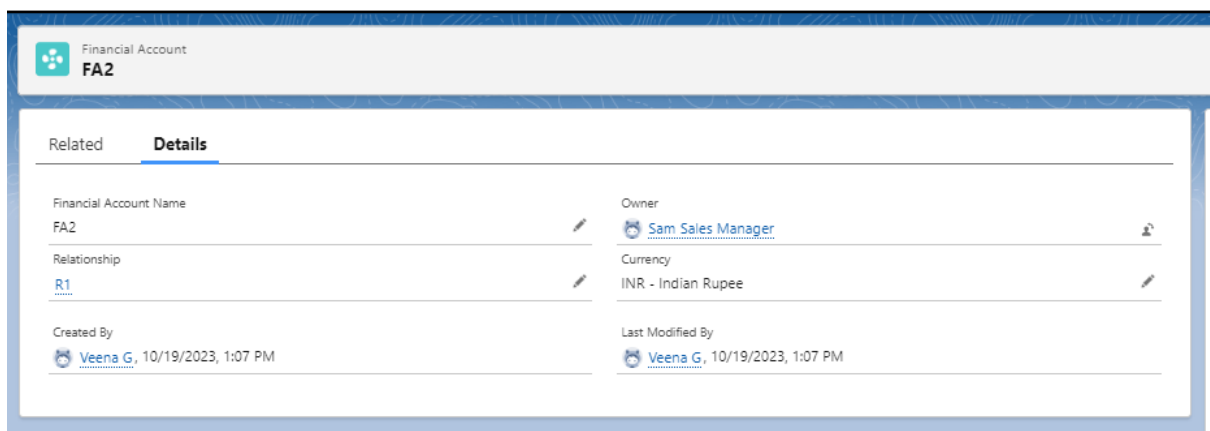
The screenshot shows the 'Financial Account' object configuration page in Salesforce, specifically the 'Fields & Relationships' tab. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Financial Account Custom Field Relationship' and includes a 'Back to Financial Account' link. Below this is a 'Custom Field Definition Detail' section with tabs: Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The 'Field Information' table shows the field name 'Relationship', API Name 'Relationship\_\_c', Object Name 'Financial Account', and Data Type 'Lookup'. The 'Lookup Options' section shows the field is required and has a 'What to do if the lookup record is deleted?' dropdown set to 'Clear the value of this field.'. The 'Lookup Filter' section shows 'No Lookup Filters Defined'. 'Edit' and 'Delete' buttons are in the top right.

- Change the Owner ID field in Relationship and Financial Account Objects as per the above business requirements.

Ans-



FA1 and FA2



Apex Trigger  
Relationship1

[Back to List](#) [Email Alerts](#)

Apex Trigger Detail Edit Delete Download Show Dependencies

|                  |                               |                  |                               |
|------------------|-------------------------------|------------------|-------------------------------|
| Name             | Relationship1                 | Object Type      | Relationship                  |
| Code Coverage    | 0% (0/6)                      | Status           | Active                        |
| Created By       | Veena G. 10/19/2023, 12:53 AM | Last Modified By | Veena G. 10/19/2023, 12:54 AM |
| Namespace Prefix |                               |                  |                               |

Apex Trigger Version Settings Trace Flags

```

1 trigger Relationship1 on Relationship__c (before update) {
2   for (Relationship__c rel : Trigger.new) {
3     if (rel.OwnerId != Trigger.oldMap.get(rel.Id).OwnerId) {
4       // Owner has changed, update the related Financial Accounts
5       List<Financial_Account__c> relatedAccounts = [SELECT Id FROM Financial_Account__c WHERE Relationship__c = :rel.Id];
6       for (Financial_Account__c acc : relatedAccounts) {
7         acc.OwnerId = rel.OwnerId;
8       }
9       update relatedAccounts;
10    }
11  }
12 }

```

- We have out of the box functionality available for this feature but we want to create a similar functionality as a custom solution.

Ans-Custom button created-

SETUP > OBJECT MANAGER  
Relationship

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
**Buttons, Links, and**

**Buttons, Links, and Actions**  
9 items. Sorted by Label

| LABEL                     | NAME                      | DESCRIPTION | TYPE               | CONTENT SOURCE   | OVERRIDDEN |
|---------------------------|---------------------------|-------------|--------------------|------------------|------------|
| Accept                    | Accept                    |             |                    | Standard page    |            |
| Change Relationship Owner | Change_Relationship_Owner |             | Detail Page Button | Visualforce Page |            |

Visualforce Page  
ChangeOwner

Page Detail Edit Delete Clone Where is this used? Show Dependencies Preview

|   |                              |  |                              |
|---|------------------------------|--|------------------------------|
| Label                                   | ChangeOwner                  | Name   | ChangeOwner                  |
| Namespace Prefix                        |                              | Available for Lightning Experience, Experience Builder sites, and the mobile app | <input type="checkbox"/>     |
| Require CSRF protection on GET requests | <input type="checkbox"/>     | Description  |                              |
| Last Modified By                        | Veena G. 10/19/2023, 1:38 PM | Created By   | Veena G. 10/19/2023, 1:15 PM |

Visualforce Markup Version Settings

```

<apex:page standardController="Relationship__c" extensions="ChangeOwner">
  <apex:form>
    <apex:pageBlock title="Change Owner">
      <apex:pageBlockSection>
        <apex:inputField value="{!Relationship__c.New_Owner__c}" />
      </apex:pageBlockSection>
      <apex:pageBlockButtons>
        <apex:commandButton action="{!changeOwner}" value="Change Owner"/>
      </apex:pageBlockButtons>
    </apex:pageBlock>
  </apex:form>
</apex:page>

```

Relationships Financial Account

New Contact Edit New Opportunity

Activity

Filters: All time

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling

No past activity. Past meetings and tasks marked

New Case  
New Lead  
Delete  
Clone  
Change Owner  
Printable View  
Sharing  
Sharing Hierarchy  
Change Relationship Owner  
Change Relationship Owner



Social Project

Home

Courses ▾

Subjects ▾

Course Leads ▾

Technologies ▾

Stati

## Change Owner

Change Owner

New Owner



Change Owner



Social Project

Home

Courses ▾

Subjects ▾

Course Leads ▾

Technologies ▾

Stations ▾

Man-Powers ▾

Supplis ▾

Instructor Name ▾

Relationships ▾

Financi



Relationship  
R1

Related Details

Relationship Name

R1

Owner

Sam Sales Manager

New Owner

Sam Sales Manager

Currency

INR - Indian Rupee

Created By

Veena G, 10/19/2023, 1:06 PM

Last Modified By

Veena G, 10/19/2023, 1:49 PM

Activity



Upcoming & Overdu

Relationship transferred to you. [Inbox x](#)



Veena G via [q0ca6vxm3j5.2t-om0ueaq.ap12.bnc.salesforce.com](mailto:q0ca6vxm3j5.2t-om0ueaq.ap12.bnc.salesforce.com)  
to me ▾

1:00 PM (49 minutes ago)



### Be careful with this message

This may be a spoofed message. The message claims to have been sent from your account, but Gmail couldn't verify the actual source. Avoid clicking links or replying with sensitive information, unless you are sure you actually sent this message. (No need to reset your password, the real sender does not actually have access to your account!)

Report spam

Looks safe



Relationship Opportunity 1 has been assigned to you. Please click on the link below to view the record.

<https://veenaenterprises-dev-ed.develop.my.salesforce.com/a0J2t00000gpYED>