

Mass transfer records (Accounts ownership)

Process to mass transfer accounts from one sales rep to another one.

Use case: a sales representative is changing of territory, or role in Solvay organisation. Then, its accounts must be assigned to another sales rep. It is only available for NON SAP Accounts (SAP Accounts owner is always Admin).

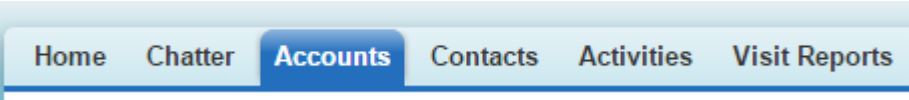
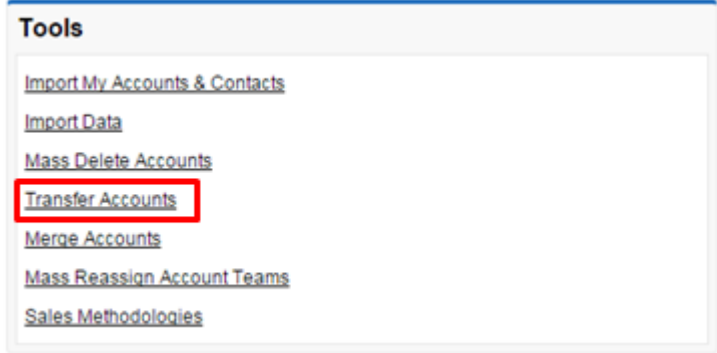
Note: this procedure can only be done by a GBU Data Steward or an Administrator.

Note 2: only the prospects accounts can be transferred. Indeed, all the SAP Customer accounts have Admin as owner.

Table of contents

- [Process to mass transfer accounts from one sales rep to another one.](#)
- [Table of contents](#)
- [Step-by-step](#)
 - [Step 1: Go to the Accounts tab](#)
 - [Step 2: Select the two sales representatives](#)
 - [Step 3: Select Accounts to be transferred](#)
 - [Step 4: Go to the Accounts tab](#)
 - [Step 5: Remove an account team member](#)
- [Related articles](#)
- [Can't find information?](#)

Step-by-step

Step 1: Go to the Accounts tab	
Click on A ccounts tab.	 A screenshot of a navigation bar with tabs: Home, Chatter, Accounts, Contacts, Activities, and Visit Reports. The 'Accounts' tab is highlighted in blue.
Click on T ransfer a ccounts .	 A screenshot of a 'Tools' menu with the following items: Import My Accounts & Contacts, Import Data, Mass Delete Accounts, Transfer Accounts (highlighted with a red box), Merge Accounts, Mass Reassign Account Teams, and Sales Methodologies.
Step 2: Select the two sales representatives	
Select the user who is the actual owner.	

Select the target owner.

Mass Transfer Accounts

Transfer from

Transfer to

Transfer open opportunities not owned by the existing account owner

Transfer closed opportunities

Transfer open cases owned by the existing account owner

Transfer closed cases

Keep Account Team

Keep Opportunity Team on opportunities transferred to new owner.

Mass Transfer Accounts

Transfer from

Transfer to

Transfer open opportunities not owned by the existing account owner

Transfer closed opportunities

Transfer open cases owned by the existing account owner

Transfer closed cases

Keep Account Team

Keep Opportunity Team on opportunities transferred to new owner.

Review settings.

You must tick the boxes:

"Keep Account Team" and **"Keep Opportunity Team on opportunities transferred to new owner"**

Mass Transfer Accounts

Transfer from

Transfer to

Transfer open opportunities not owned by the existing account owner

Transfer closed opportunities

Transfer open cases owned by the existing account owner

Transfer closed cases

Keep Account Team

Keep Opportunity Team on opportunities transferred to new owner.

But do not tick the other boxes !!

Step 3: Select Accounts to be transferred

Click **Find** button.

Note: you can use filter to select accounts matching specific criterias.

Find accounts that match the following criteria:

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 30/03/2016
- For date/time fields, enter the value in following format: 30/03/2016 16:31

Find

Check **Account** to be transfered.

If you check this checkbox, all accounts will be selected.

<input type="checkbox"/>	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
<input checked="" type="checkbox"/>	A + E FISCHER-CHEMIE GMBH & CO. KG CHEMIKALIENGROSSHANDEL		Hessen	0611 92846	Sold-to & Ship-to	sapuser
<input checked="" type="checkbox"/>	A_AGOSTINHO-Quimicos e Minerais Unipessoal, Lda.		Grande Porto	227150960	Ship-to	sapuser
<input type="checkbox"/>	A AND A DISTRIBUTING					admin
<input checked="" type="checkbox"/>	A B CHEM (INDIA)		Paris	911923243634	Ship-to	nsuqate
<input checked="" type="checkbox"/>	A DUJIE PYLE					admin
<input type="checkbox"/>	A I B BEATA DOBOSIEWICZ		Warszawa		Sold-to & Ship-to	sapuser

Click on **Transfer** button.

Note: you can only transfer 250 accounts a time.

<input type="checkbox"/>	Account Name	Account Site	Billing State/Province	Phone	Type
<input checked="" type="checkbox"/>	A + E FISCHER-CHEMIE GMBH & CO. KG CHEMIKALIENGROSSHANDEL		Hessen	0611 92846	Sold-to & Ship-to
<input checked="" type="checkbox"/>	A_AGOSTINHO-Quimicos e Minerais Unipessoal, Lda.		Grande Porto	227150960	Ship-to
<input type="checkbox"/>	A AND A DISTRIBUTING				

Step 4: Go to the Accounts tab

Click on **Accounts** tab.

Home Chatter **Accounts** Contacts Activities Visit Reports

Click on **Mass Reassign Account Teams**

Tools

[Mass Delete Accounts](#)

[Transfer Accounts](#)

[Merge Accounts](#)

[Mass Reassign Account Teams](#)

[Sales Methodologies](#)

Step 5: Remove an account team member

Click on **Remove an account team member** and then Click on **Next**

Mass Account Team Reassign

Step 1. Choose to add, remove or reassign a team member

- Add an account team member
- Remove an account team member
- Replace an existing account team member with a new team member, or change the role of an existing team member

To remove the user from the account team filter with the **Account Record Type** which should be **Non SAP Customer** and **Account : Owner Last Name** should be equal to the Last Name of the new account owner.

Mass Account Team Reassign

Step 2. Search for Accounts

Search for the accounts from which you want to remove a team member:

Account: Account Record Type	▼	equals	▼	Non SAP Customer	AND
Account: Owner Last Name	▼	equals	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 4/08/2017

You can add more filters if you want.

Then, Click on **Next**

You can select the accounts from which you want to remove or all by ticking the check boxes.

If you check this checkbox, all accounts will be selected.

<input type="checkbox"/>	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
<input checked="" type="checkbox"/>	A + E FISCHER-CHEMIE GMBH & CO. KG CHEMIKALIENGROSSHANDEL		Hessen	0611 92846	Sold-to & Ship-to	sapuser
<input checked="" type="checkbox"/>	A. AGOSTINHO-Quimicos e Minerais Unipessoal, Lda.		Grande Porto	227150960	Ship-to	sapuser
<input type="checkbox"/>	A AND A DISTRIBUTING					admin
<input checked="" type="checkbox"/>	AB CHEM (INDIA)		Paris	911923243634	Ship-to	nsugate
<input checked="" type="checkbox"/>	A DUJIE PYLE					admin
<input type="checkbox"/>	A I B BEATA DOBOSIEWICZ		Warszawa		Sold-to & Ship-to	sapuser

Then, Click on **Next**

Select the **Existing team Member** that you want to remove and keep the **Team role** as **Any role**. If you want to remove specific role of the Existing user, you can click on the role.


Next, click on **Remove**

The user has been removed from the account teams !

Mass Account Team Reassign

Step 4. Remove an account team member

Specify the team member that you would like to remove from each selected account.

Existing Team Member	User	Paige Willey	
Team Role	--Any Role--		

- Reassign all open activities owned by the removed team member to the account owner
- Reassign all open opportunities owned by the removed team member to the account owner
- Reassign all open cases owned by the removed team member to the account owner
- Reassign all contacts owned by the removed team member to the account owner

Related articles

Can't find information?

Related docs

- [Web support contact](#)

Last modifications :

User	Last Update
GASQUETON, JULIEN	3299 days ago
Julien Andreoli-ext	3692 days ago
Dharmika PALADUGU	3300 days ago
Charles Lachaize-ext	3301 days ago
BRAHIM, Walid	
KANJA-ext, Zakaria	
NWANGWU, Daniel	