Guide n° 18

Customer FIRST

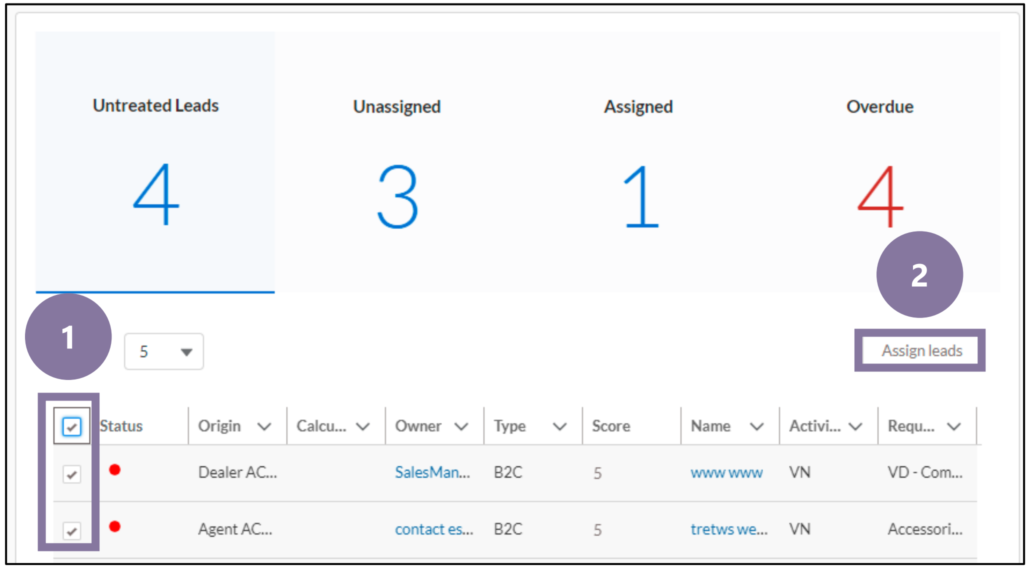
Handy guides

Sales Manager

Assigning Leads

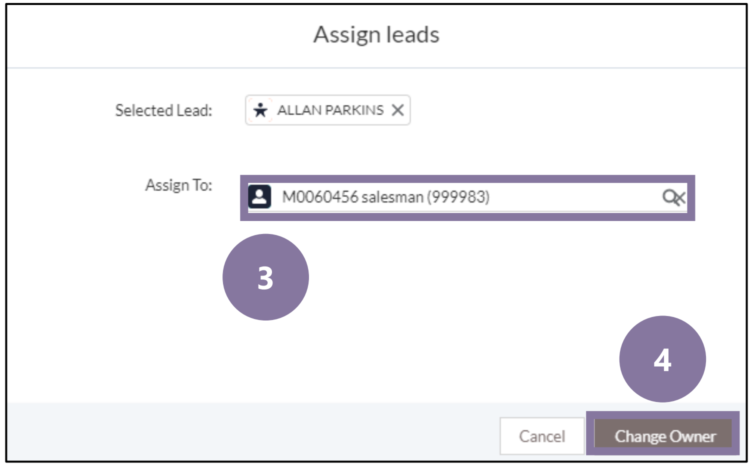
Managing my team

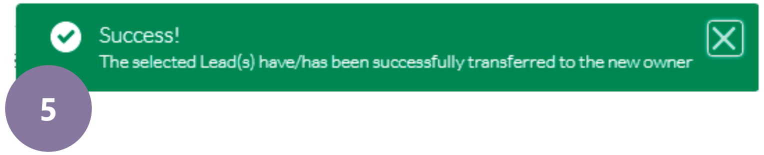
How to ensure that my sales team are treating leads on time.



If you need to assign leads to another person in your retailer, you can do this from the summary screen OR by changing the owner in the details screen of the lead.

Note that **by default** any user with the Sales Manager, BDC User or Aftersales Manager role can see **all** leads for that site regardless of the 'owner' specified on the lead. If you need a user with a Sales Person or Secretary role to see a lead, you must use this process to assign it to them.





1. Select the leads you want to assign.
2. Click on **Assign leads**.
3. Select the user you want to assign the lead to.
4. Click on **Change Owner**.
5. A green confirmation message is displayed..

If the confirmation does not appear, use F5 to refresh the page.