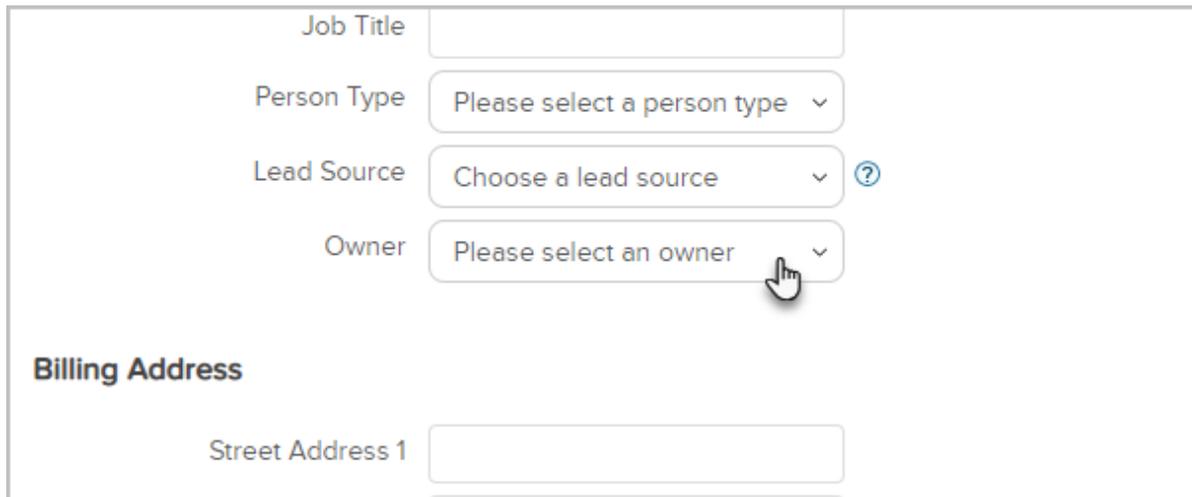


# Reassign contacts to another user

Note: You will need the proper [permissions](#) to change the owner drop-down menu

## Reassign an Individual Contact Record

1. While viewing a contact record, select a user from the *owner* drop-down menu.



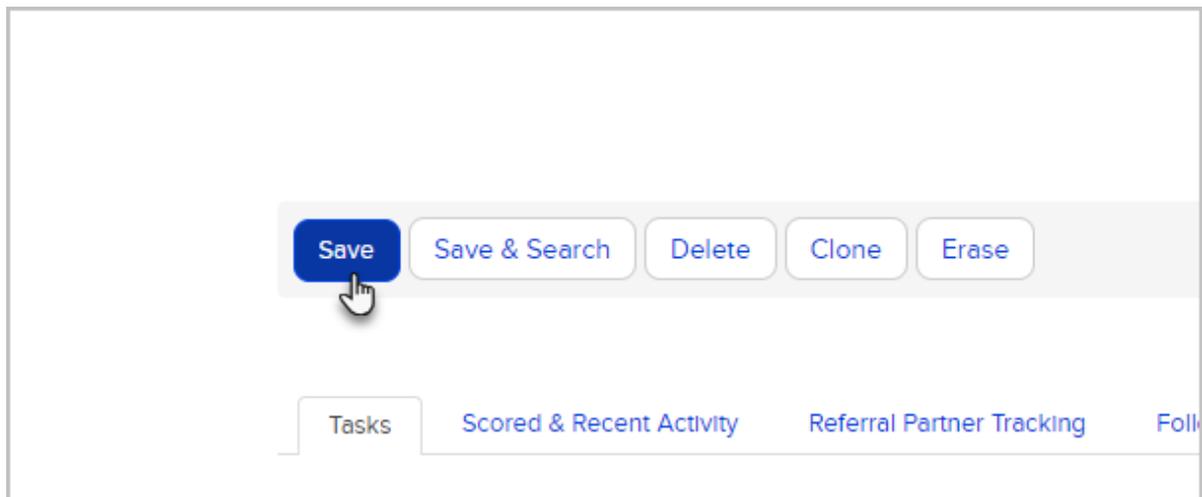
The screenshot shows a contact record form with the following fields:

- Job Title:
- Person Type:
- Lead Source:  
- Owner:  

**Billing Address**

- Street Address 1:

2. Click on the **Save** button to apply the change.



The screenshot shows the bottom of the contact record interface with the following buttons and tabs:

- Buttons: **Save** (with hand cursor), Save & Search, Delete, Clone, Erase
- Tabs: Tasks, Scored & Recent Activity, Referral Partner Tracking, Follow

## Reassign a Group of Contacts to Another User

You can reassign a group of contacts or opportunities to a new owner. You can do this in one of three ways:

- **Reassign Contacts (Batch) or Reassign Opportunities (Batch):** This option allows you to reassign an entire list of contacts or opportunities to one person. You might use this when you want to assign all of the opportunities in a specific stage to one sales rep (e.g. a "Qualifying" stage.)
- **Reassign Contacts (Multi-user) or Reassign Opportunities (Multi-user):** This option allows you to redistribute a list of contact or opportunity records using a numerical logic. You can create new logic rules or use an existing round robin distribution logic. You might want to use this when a sales rep leaves and you need to reassign his opportunities to multiple sales reps.
- **Reassign Contacts (Datasheet):** This option allows you to quickly update the owner (assigned user) for up to 20 contact records at a time.
- **Reassign Opportunities (Quick Edit):** This option allows you to quickly edit the user, next action date, and stage for on a per-opportunity basis. Each opportunity can have different values in each field, but you edit the values from a list and can save the updates for all of the opportunities at once.

1. Go to **CRM > Contacts** or **CRM > Opportunities**
2. Select a saved search from the drop-down, or enter search criteria to create a new list
3. Click on the **Actions** button and select a reassignment option from the drop-down (e.g. Reassign Contacts (Batch), etc.)

## Contacts

Actions ▾
New Search
Edit Criteria/Columns
Save
Print

- Apply Action Set
- Apply/Remove Tag
- Assign to Company
- Create Opportunities
- Create Referral
- Partner Referral
- Create a Task
- Create an Appointment
- Delete Contacts
- Export
- Mass Update Contacts
- Merge Duplicate Contacts
- Print Labels
- Reassign Contacts (Batch)
- Reassign Contacts (Datasheet)
- Reassign Contacts

<p>Williams </p> <p>mentum@cursus.org</p> <p>Phone State: Leads</p>
<p>Williams </p> <p>mentum@cursus.org</p> <p>Phone State: Leads</p>
<p>kins </p> <p>@elit.org</p> <p>Phone State: Leader</p>

- Choose the user to reassign. Note that you have the option to also reassign any opportunities that are associated with the contact record as well.

### Reassign Contacts (Batch)

Your search returned **2 results**. This action will re-assign contacts to a new user.

Reassign to: Please select a new user:

Also Reassign All Leads

Process Action
Cancel

- Click on **Process Action** or **Save** to reassign the opportunities

## Reassign Contacts (Batch)

Your search returned **2 results**. This action will re-assign contacts to

Reassign to:

Martin Cash



Also Reassign All Leads

Process Action

Cancel

