



Test Your Knowledge – Reassign

Reassign- This module allows you to transfer the ownership of any object in your CRM in a single pass.

Use Case 1 – Reassign Accounts

The Sales Manager at Debbie's company is in the process of creating new territories for her sales team. She asked Debbie to start with reassigning all the Accounts and the corresponding Contacts in Oregon to Aja Sanders.

*Take a screenshot of each step including the results screen.

*****DO NOT PROCESS*****

Use Case 2 – Reassign Subset Territories

After the Sales Manager reviewed the number of accounts now assigned to Aja, she asked Debbie to further sub-set the territory as follows:

- City of Portland = Manuel Leyva
- City of Beaverton = Jen Ball
- City of Eugene = Olivia Hinkle
- The remaining accounts will be assigned to Aja

The Sales Manager also requested that all open opportunities, open tasks, and contacts regardless of who the current owner is to be reassigned to the new account owner.

*Take a screenshot of each step including the results screen.

*****DO NOT PROCESS*****

Use Case 3 – Reassign Contacts to Current Owner

Debbie successfully reassigned the Oregon accounts per the Sales Manager's request, but she isn't sure that she selected the right option for reassigning contacts and would like to ensure all Oregon Contacts are assigned to the current account owner.

*Take a screenshot of each step including the results screen.

*****DO NOT PROCESS*****
