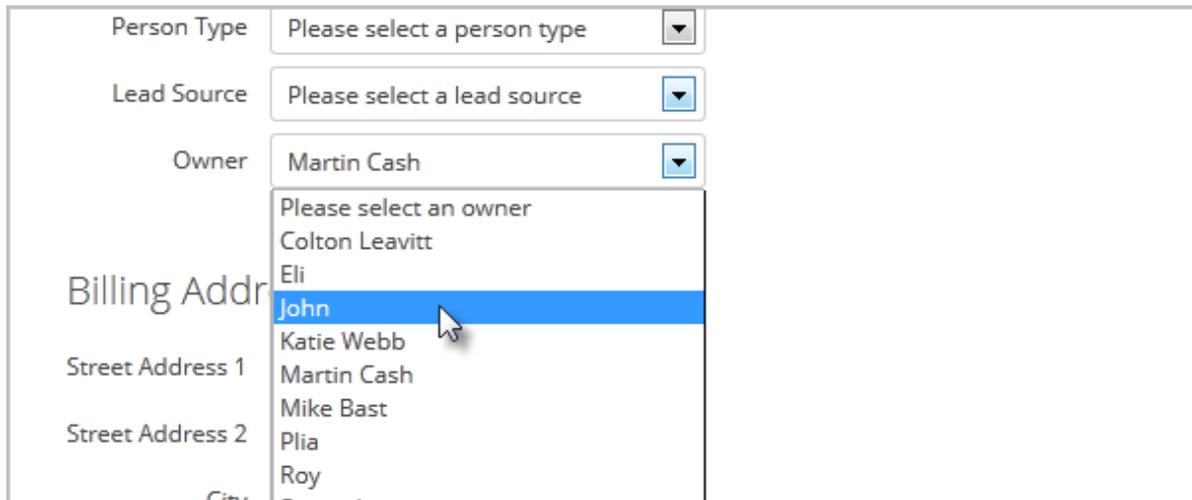


# Reassign contacts to another user

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 several fields. The 'Owner' field is currently set to 'Martin Cash'. The dropdown menu is open, showing a list of users: 'Please select an owner', 'Colton Leavitt', 'Eli', 'John', 'Katie Webb', 'Martin Cash', 'Mike Bast', 'Plia', and 'Roy'. The 'John' option is highlighted in blue, and a mouse cursor is pointing at it. Other fields visible include 'Person Type' (Please select a person type), 'Lead Source' (Please select a lead source), 'Billing Address', 'Street Address 1', and 'Street Address 2'.

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

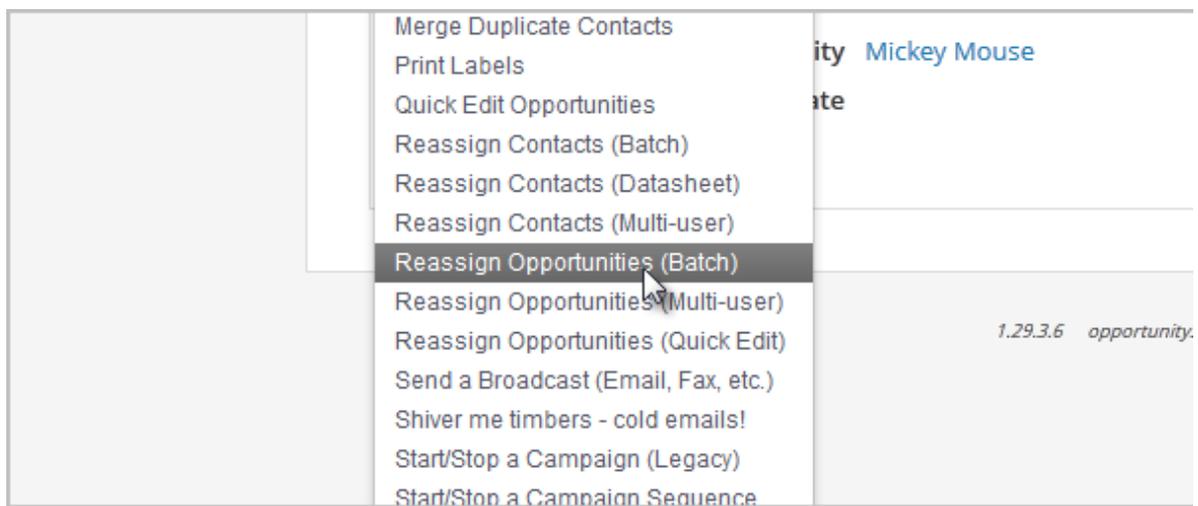
## Reassign a Group of Contacts to Another User

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 Opportunities (Batch), etc.)



4. Reassign the opportunities using one of the methods listed above
  5. Click on **Process Action** or **Save** to reassign the opportunities
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