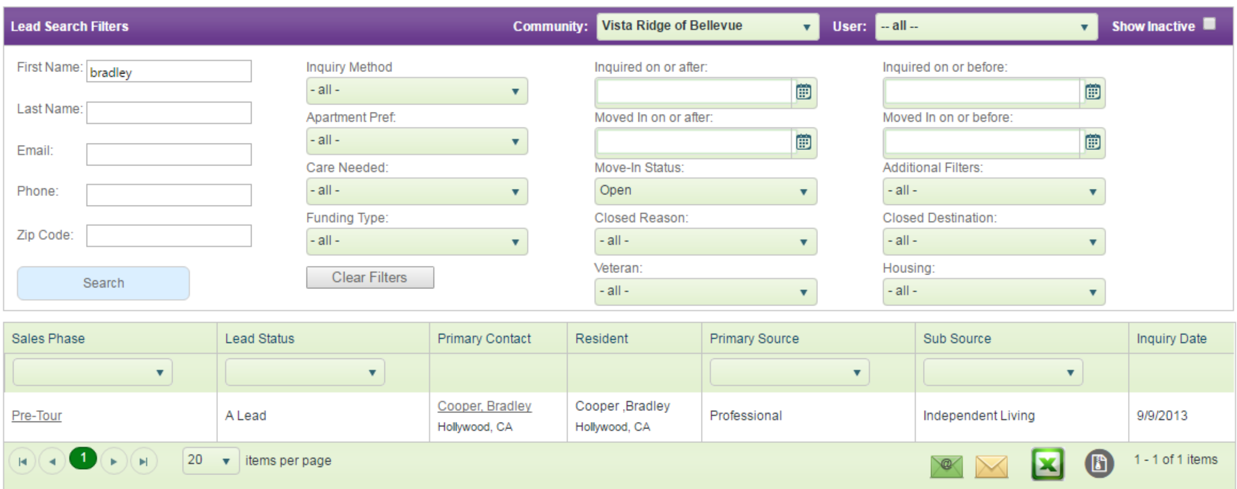
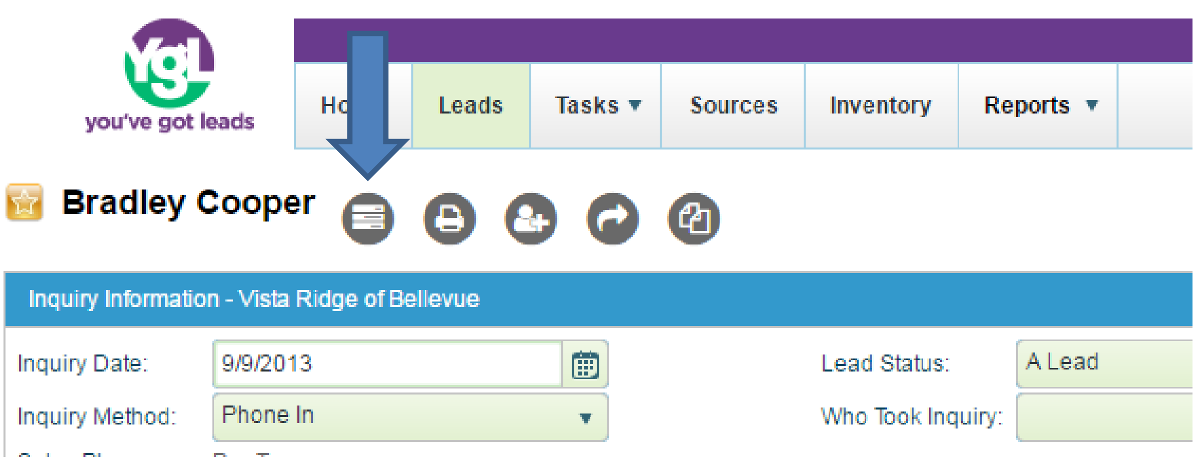
How to Use the Owner Column in Tasks

How to Use the Owner Column in Tasks:

1. First find your lead in the Leads tab. Then click the lead to access their profile page.

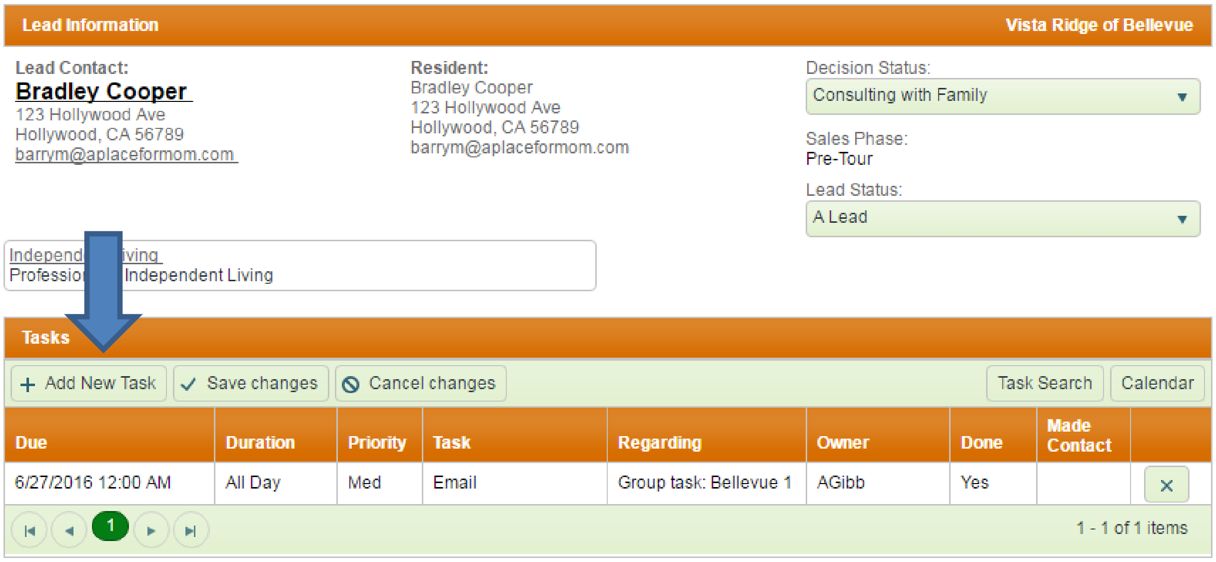


2. Select the view tasks icon to access their task page

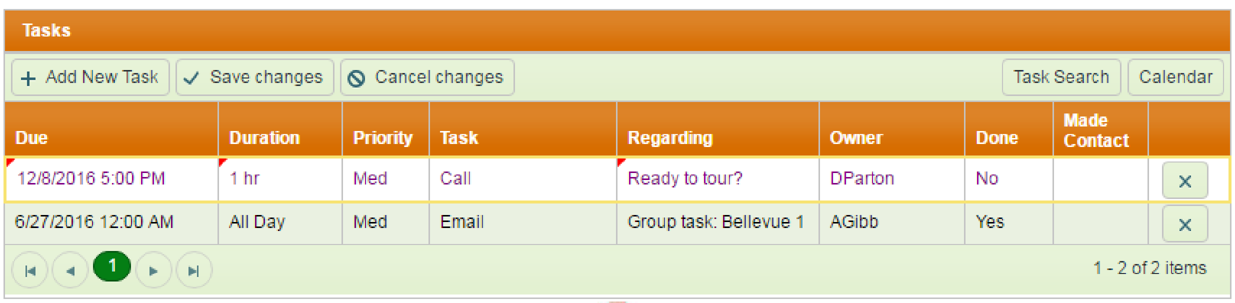


Fun Fact: For a quicker way to the task page, try selecting the sales phase for that lead (for the example in the first screenshot, you would select "Pre-Tour").

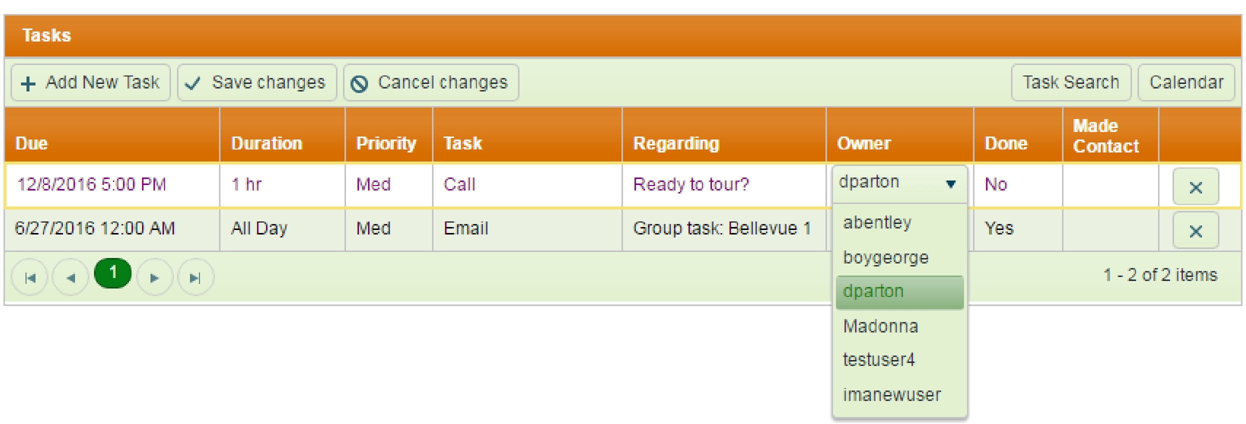
3. Select “Add new Task” to create your task line.



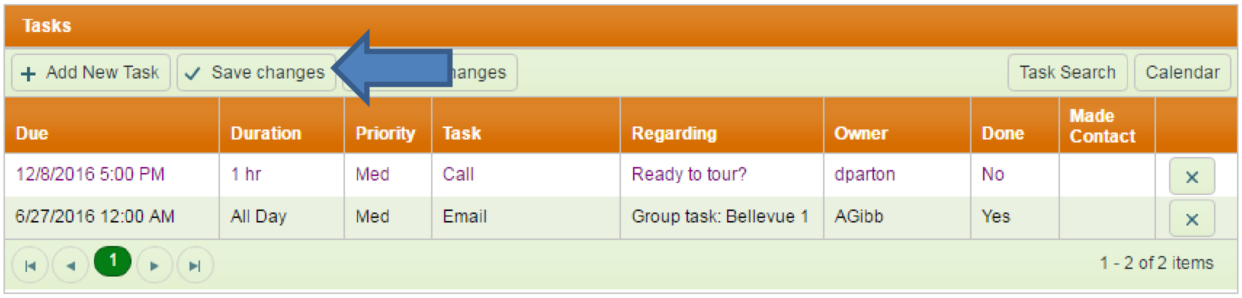
4. Edit the row to reflect the task that you would like to schedule.



5. Under the column “Owner” – select the user that this task will be assigned to – keep in mind that this person will see this task as their own.
    a. This will also reflect in reports.



6. Once you have entered in the task's information, select "Save Changes."



Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
12/8/2016 5:00 PM	1 hr	Med	Call	Ready to tour?	dparton	No		×
6/27/2016 12:00 AM	All Day	Med	Email	Group task: Bellevue 1	AGibb	Yes		×

7. You have now properly assigned a task an owner.