



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.

Sales Phase	Lead Status	Primary Contact	Resident	Primary Source	Sub Source	Inquiry Date
Pre-Tour	A Lead	Cooper, Bradley Hollywood, CA	Cooper, Bradley Hollywood, CA	Professional	Independent Living	9/9/2013

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

Bradley Cooper

Inquiry Information - Vista Ridge of Bellevue

Inquiry Date: 9/9/2013
Inquiry Method: Phone In
Lead Status: A Lead
Who Took Inquiry:

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.

Lead Information Vista Ridge of Bellevue

Lead Contact:
Bradley Cooper
 123 Hollywood Ave
 Hollywood, CA 56789
 barrym@aplaceformom.com

Resident:
 Bradley Cooper
 123 Hollywood Ave
 Hollywood, CA 56789
 barrym@aplaceformom.com

Decision Status:
 Consulting with Family

Sales Phase:
 Pre-Tour

Lead Status:
 A Lead

Independent Living
 Professional Independent Living

Tasks

+ Add New Task ✓ Save changes ⏏ Cancel changes Task Search Calendar

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
6/27/2016 12:00 AM	All Day	Med	Email	Group task: Bellevue 1	AGibb	Yes		X

1 - 1 of 1 items

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

Tasks

+ Add New Task ✓ Save changes ⏏ Cancel changes Task Search Calendar

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

1 - 2 of 2 items

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.
- This will also reflect in reports.

Tasks

+ Add New Task ✓ Save changes ⏏ Cancel changes Task Search Calendar

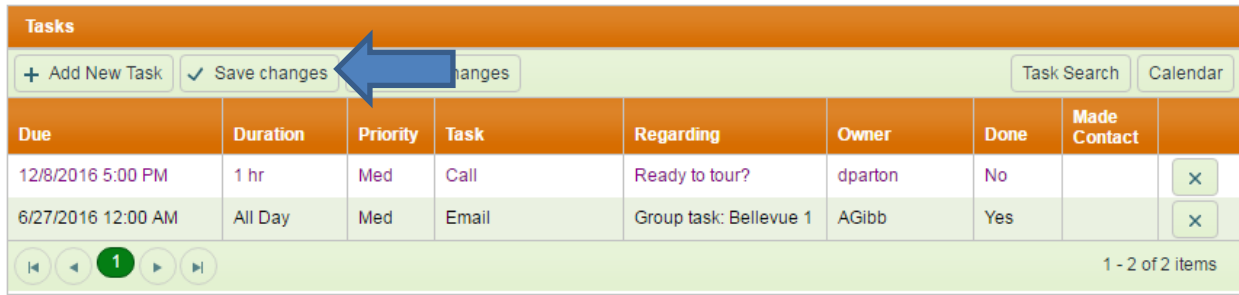
Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
12/8/2016 5:00 PM	1 hr	Med	Call	Ready to tour?	dparton	No		X
6/27/2016 12:00 AM	All Day	Med	Email	Group task: Bellevue 1	abentley	Yes		X

1 - 2 of 2 items

Dropdown menu for Owner:

- dparton
- abentley
- boygeorge
- dparton
- Madonna
- testuser4
- imanewuser

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



The screenshot shows a task management interface. At the top, there is a header bar with the word "Tasks". Below the header, there is a toolbar with buttons for "+ Add New Task", "✓ Save changes" (highlighted with a blue arrow), and "Save changes". To the right of the toolbar are buttons for "Task Search" and "Calendar". Below the toolbar is a table with the following columns: Due, Duration, Priority, Task, Regarding, Owner, Done, Made Contact, and an empty column. The table contains two rows of task data. At the bottom of the interface, there is a pagination bar with navigation arrows and the text "1 - 2 of 2 items".

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

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