USING WORKFLOW

1. Click Companies

2. Click Search Criteria

3. Enter your search criteria, and click to search.
4. You can use Workflow to perform mass functions. We'll assign these accounts to a new Rep.

5. Select all records.
6. Click Workflow

7. Click Assign
8. Choose Assign User

7. Click Assign
9. Select the Rep you want to assign.

10. We selected Bob Cooper.

12. We selected Inside Sales Rep

13. Click to save your selections

14. Click OK