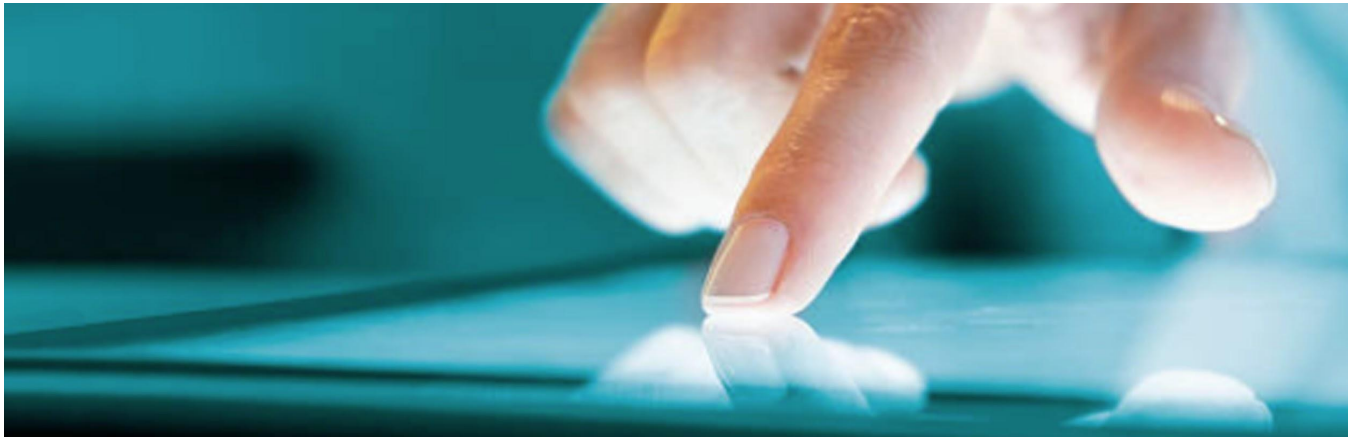


Reassignment How To



Context:

Opportunities created through the SwiftLink flow are categorized as “Unassigned”. These opportunities should be reassigned to Sales Reps to progress them forward after they appear in pipeline.

Watch outs:

*We are optimizing the flow to access reassignment, but for right now, this can take a couple of clicks.

How to steps:

Note, reassignment is part of the customer info screen.

- From your Pipeline, click "Edit"

Customer		Status	Activity	Queue
Reassign Demo 3428 Helen Street Oakland	● ○ ○ ●	Pre-qualification approved Unassigned (edit)	just now	0

- Click "Edit Customer Info"

Demo Reassignment Bauhaus ?

Info Estimate Apply Setup

Customer info

If you need to make additional edits, please contact customer support at +1 (855) 746-5551 or support@joinmosaic.com

Mobile phone number
(510) 457-1363

Full name
Demo Reassignment

Email address
testingreassignment@joinmosaic.com

Project address
4323 Leach Ave Oakland CA 94602

Project address use
Primary residence

Prefer to receive mail at a different address

Notes Assigned to
Mosaic Support

EDIT CUSTOMER INFO

Last modified just now

- Use the drop down to select the desired Sales Rep

Demo Reassignment Bauhaus ?

Info Estimate Apply Setup

Customer info

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Full name
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Notes
Assigned to
Mosaic Support

Ajay Dandavati
Ajay Dandavati
Ajay Dandavati
Ajay Dandavati
Ajay Dandavati

CANCEL SAVE CHANGES

Last modified just now

- Click "Save" or "Save & Continue" when you've selected the appropriate Sales Rep

Demo Reassignment Bauhaus ?

Info Estimate Apply Setup

Customer info

If you need to make additional edits, please contact customer support at +1 (855) 746-5551 or support@joinmosaic.com

Mobile phone number
(510) 457-1363

Full name
Demo Reassignment

Email address
testingreassignment@joinmosaic.com

Project address
4323 Leach Ave **Oakland** **CA** **94602**

Project address use
Primary residence

Prefer to receive mail at a different address


Notes
Assigned to
Bruce Lee

CANCEL **SAVE CHANGES** **SAVE & CONTINUE**

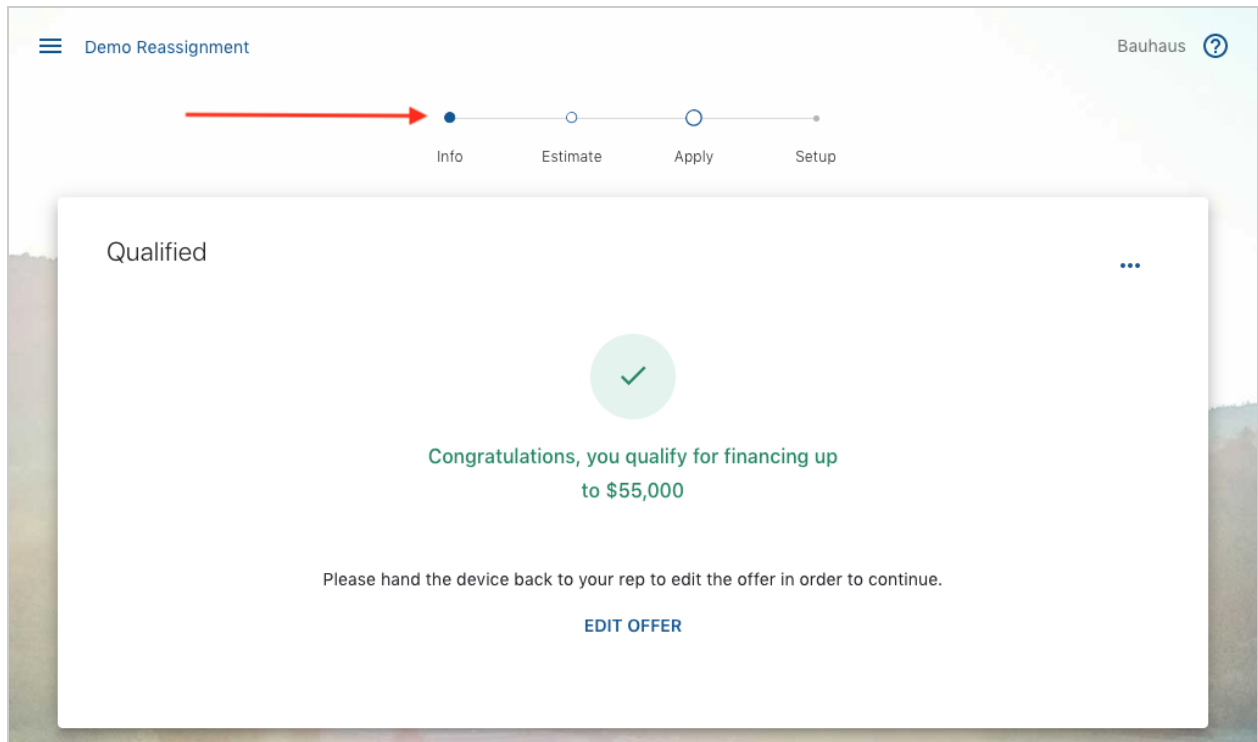
Last modified just now

Alternatively:

- Click on Customer in Pipeline

Customer	Status	Activity	Queue
Reassign Demo 3428 Helen Street Oakland	 Pre-qualification approved Unassigned (edit)	just now	0

- Click on “Info” in the top navigation



The screenshot shows the 'Demo Reassignment' interface. At the top, there is a navigation bar with a hamburger menu icon, the text 'Demo Reassignment', and the user name 'Bauhaus' with a help icon. Below the navigation bar is a progress bar with four steps: 'Info', 'Estimate', 'Apply', and 'Setup'. The 'Info' step is currently selected, indicated by a red arrow pointing to a filled circle. Below the progress bar, a modal window titled 'Qualified' is displayed. The modal contains a green checkmark icon, the text 'Congratulations, you qualify for financing up to \$55,000', and a message: 'Please hand the device back to your rep to edit the offer in order to continue.' At the bottom of the modal is a blue button labeled 'EDIT OFFER'.

- Click "Edit Customer Info"

Demo Reassignment Bauhaus ?

Info Estimate Apply Setup

Customer info

If you need to make additional edits, please contact customer support at +1 (855) 746-5551 or support@joinmosaic.com

Mobile phone number
(510) 457-1363

Full name
Demo Reassignment

Email address
testingreassignment@joinmosaic.com

Project address
4323 Leach Ave Oakland CA 94602

Project address use
Primary residence

Prefer to receive mail at a different address

Notes Assigned to Mosaic Support

EDIT CUSTOMER INFO

Last modified just now

- Type name or select from the dropdown

Demo Reassignment Bauhaus ?

Info Estimate Apply Setup

Customer info

If you need to make additional edits, please contact customer support at +1 (855) 746-5551 or support@joinmosaic.com

Mobile phone number
(510) 457-1363

Full name
Demo Reassignment

Email address
testingreassignment@joinmosaic.com

Project address
4323 Leach Ave Oakland CA 94602

Project address use
Primary residence

Prefer to receive mail at a different address

Notes
Assigned to
Mosaic Support
Ajay Dandavati
Ajay Dandavati
Ajay Dandavati
Ajay Dandavati

CANCEL SAVE CHANGES

Last modified just now

- Click "Save" or "Save & Continue" when you have found the appropriate Sales Rep

Demo Reassignment Bauhaus ?

Info Estimate Apply Setup

Customer info

If you need to make additional edits, please contact customer support at +1 (855) 746-5551 or support@joinmosaic.com

Mobile phone number
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Primary residence

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Notes
Assigned to
Bruce Lee

CANCEL **SAVE CHANGES** **SAVE & CONTINUE**

Last modified just now