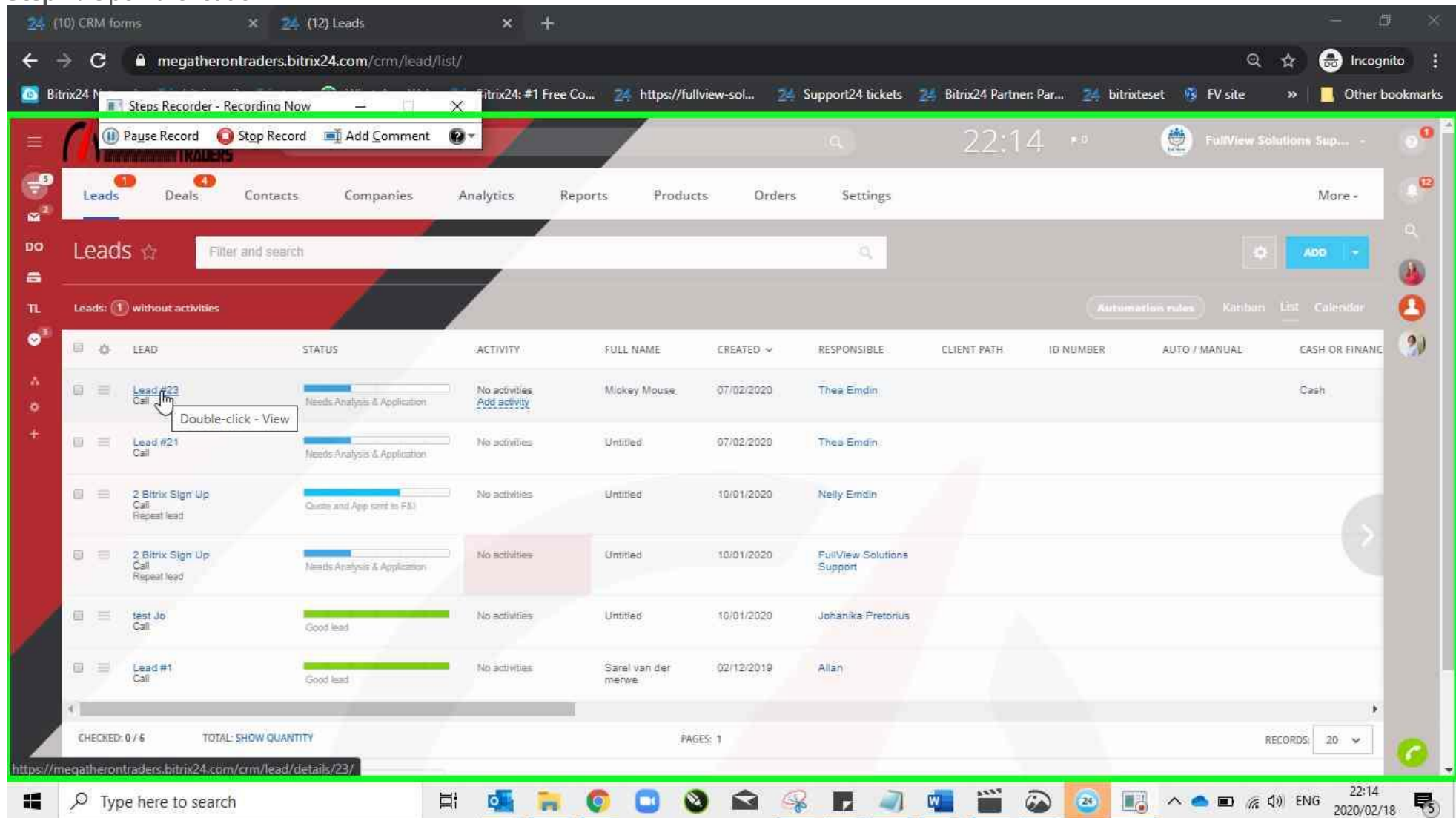


Steps to Change responsible person

Step 1: Open the lead

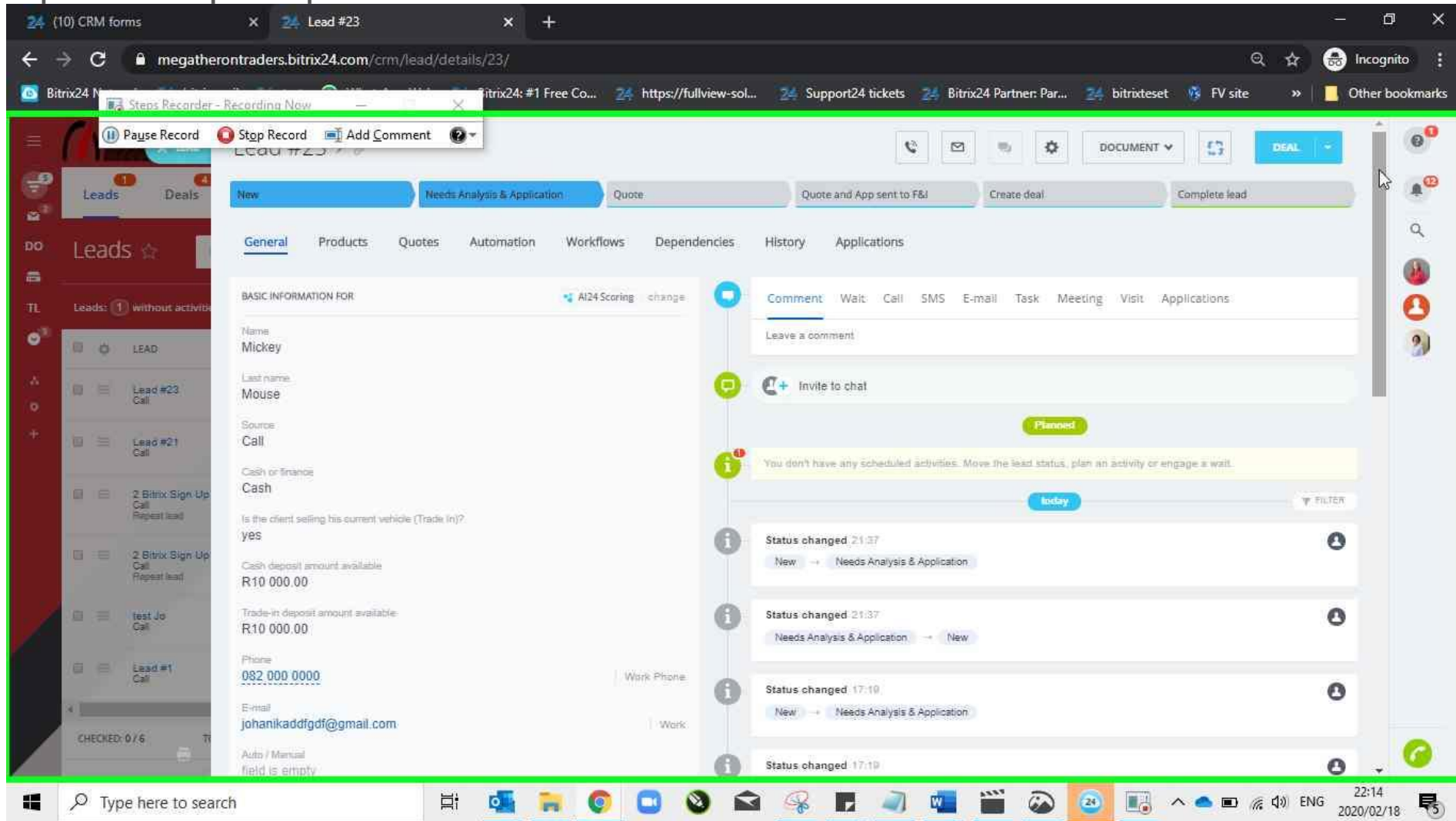


The screenshot shows the Bitrix24 CRM interface. At the top, there are navigation tabs for Leads, Deals, Contacts, Companies, Analytics, Reports, Products, Orders, and Settings. The 'Leads' tab is active. Below the navigation, there is a search bar and a list of leads. A callout box points to the first lead, 'Lead #23', with the text 'Double-click - View'.

LEAD	STATUS	ACTIVITY	FULL NAME	CREATED	RESPONSIBLE	CLIENT PATH	ID NUMBER	AUTO / MANUAL	CASH OR FINANC
Lead #23 Call	Needs Analysis & Application	No activities Add activity	Mickey Mouse	07/02/2020	Thea Emdin				Cash
Lead #21 Call	Needs Analysis & Application	No activities	Untitled	07/02/2020	Thea Emdin				
2 Bitrix Sign Up Call Repeat lead	Quote and App sent to Fill	No activities	Untitled	10/01/2020	Nelly Emdin				
2 Bitrix Sign Up Call Repeat lead	Needs Analysis & Application	No activities	Untitled	10/01/2020	FullView Solutions Support				
test Jo Call	Good lead	No activities	Untitled	10/01/2020	Johanika Pretorius				
Lead #1 Call	Good lead	No activities	Sarel van der merwe	02/12/2019	Allan				

At the bottom of the interface, there is a search bar and a taskbar with various application icons. The system tray shows the time as 22:14 on 2020/02/18.

Step 2: Find the responsible person field

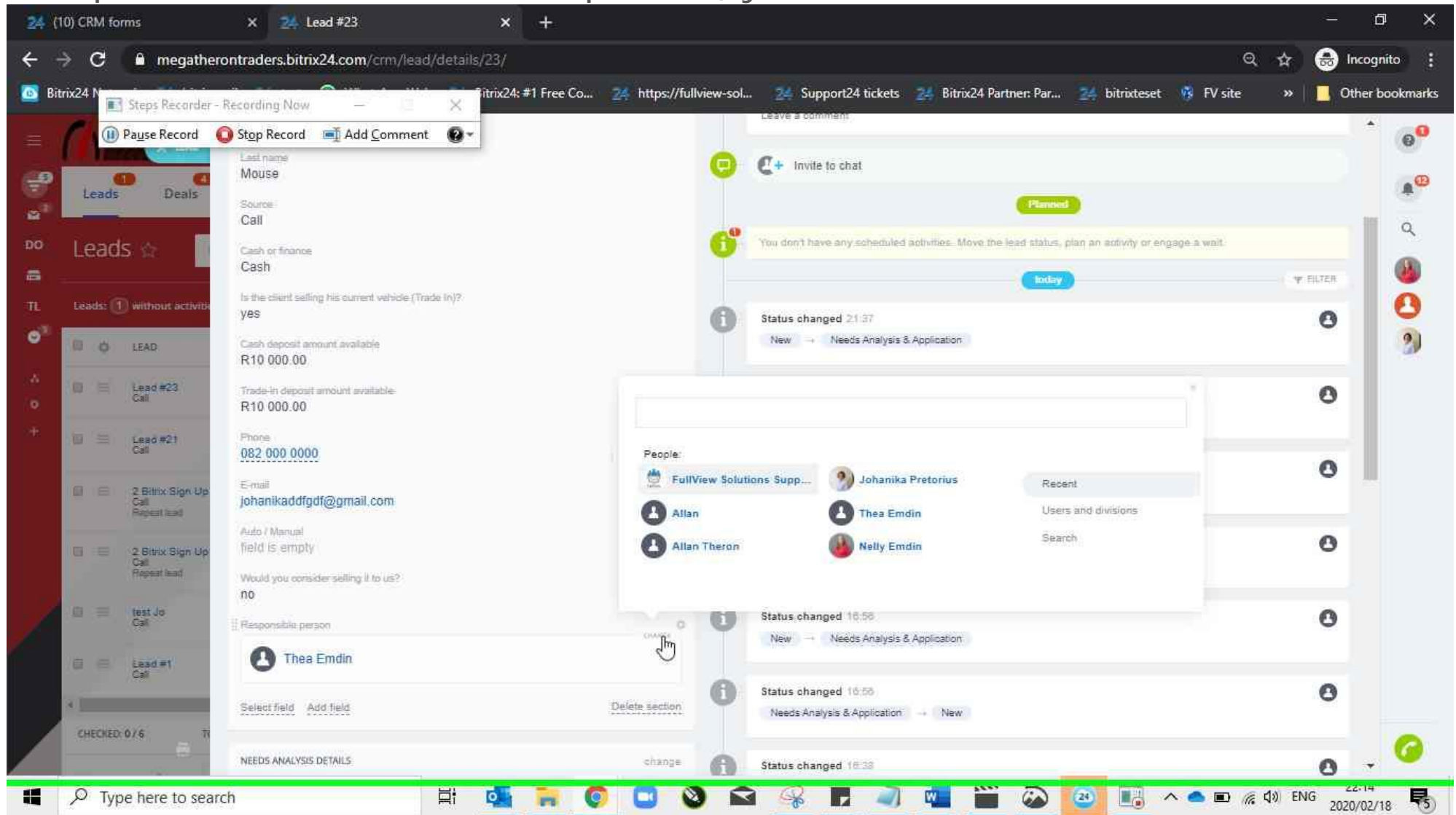


The screenshot shows the Bitrix24 CRM interface for a lead named 'Mickey Mouse'. The browser address bar shows the URL: `megatherontraders.bitrix24.com/crm/lead/details/23/`. The interface includes a top navigation bar with a 'DEAL' dropdown menu and a 'Steps Recorder' overlay with 'Pause Record', 'Stop Record', and 'Add Comment' buttons. The lead details are organized into tabs: 'General', 'Products', 'Quotes', 'Automation', 'Workflows', 'Dependencies', 'History', and 'Applications'. The 'General' tab is active, displaying 'BASIC INFORMATION FOR Mickey Mouse'. The information includes: Name: Mickey, Last name: Mouse, Source: Call, Cash or finance: Cash, Is the client selling his current vehicle (Trade in)? yes, Cash deposit amount available: R10 000.00, Trade-in deposit amount available: R10 000.00, Phone: 082 000 0000, and E-mail: johanikaddgdf@gmail.com. The right-hand side of the interface shows a communication history with 'Status changed' events and a 'Planned' activity section. The Windows taskbar at the bottom shows the system time as 22:14 on 2020/02/18.

Step 3: Hover to the right of the field to find the CHANGE option

The screenshot displays the Bitrix24 CRM interface for a lead record. The browser address bar shows the URL megatherontraders.bitrix24.com/crm/lead/details/23/. The lead details form includes fields for Last name (Mouse), Source (Call), Cash or finance (Cash), and a question about trade-in. The 'Responsible person' field is currently set to Thea Emdin. A tooltip with the text 'CHANGE' is visible over the right side of this field. The right sidebar shows a 'Planned' section with a message: 'You don't have any scheduled activities. Move the lead status, plan an activity or engage a wait.' Below this, a 'today' filter shows a list of 'Status changed' events, each with a time and a transition from 'New' to 'Needs Analysis & Application'. The Windows taskbar at the bottom shows the system clock at 22:14 on 2020/02/18.

Step 4: Select CHANGE and search and select the responsible user/agent



The screenshot shows the Bitrix24 CRM interface in a browser window. The main content area displays the details for 'Lead #23', which is a 'Call' lead. The lead's status is 'Planned'. A 'Steps Recorder' window is overlaid on the top left, showing 'Recording Now' and buttons for 'Pause Record', 'Stop Record', and 'Add Comment'. A 'People' selection dialog is open in the center, showing a list of users: 'FullView Solutions Supp...', 'Johanika Pretorius', 'Allan', 'Thea Emdin', 'Allan Theron', and 'Nelly Emdin'. The 'Recent' tab is selected. The 'Responsible person' field in the lead details is currently set to 'Thea Emdin'. The bottom of the screen shows the Windows taskbar with the system clock at 22:14 on 2020/02/18.

The screenshot displays the Bitrix24 CRM interface in a web browser. The browser's address bar shows the URL `megatherontraders.bitrix24.com/crm/lead/details/23/`. The page title is "Lead #23". A "Steps Recorder" overlay is visible at the top left, with buttons for "Pause Record", "Stop Record", and "Add Comment".

The main content area is divided into several sections:

- Left Sidebar:** Contains navigation options for "Leads" and "Deals". A list of leads is visible, including "Lead #23 Call", "Lead #21 Call", and "2 Bitrix Sign Up Call Repeat lead".
- Lead Details Panel:** Displays information for "Lead #23 Call":
 - Last name: Mouse
 - Source: Call
 - Cash or finance: Cash
 - Is the client selling his current vehicle (Trade In?): yes
 - Cash deposit amount available: R10 000.00
 - Trade-in deposit amount available: R10 000.00
 - Phone: 082 000 0000
 - E-mail: johanikadfdgdf@gmail.com
 - Auto / Manual: field is empty
 - Would you consider selling it to us?: no
 - Responsible person: Thea Emdin
- Activity Stream:** Shows a history of status changes:
 - 21:37: Status changed from New to Needs Analysis & Application.
 - 18:56: Status changed from New to Needs Analysis & Application.
 - 16:56: Status changed from Needs Analysis & Application to New.
 - 16:38: Status changed.
- User Selection Dialog:** A search box containing "full" is open, showing a list of people:
 - FullView Solutions Supp...
 - FullView Setup