

Reassign a departing rep's open deals

Northwind - October 4, 2026

Purpose	Give every open deal a new owner, so no customer waits on an empty inbox.
Scope	Use it when a rep leaves or changes team. Not for moving a single deal on request.
Owner	Tom, sales team lead. Review: 31 March 2027
Version	1.0
Prerequisites	Sales ops role in Dealflow; the new owner's name, agreed with the team lead.

- 1 In the **Owner** list at the top, select the departing rep, for example **Owner: Nina**.

d

Home

Deals

Cont.

Rep.

Deals

Owner: Nina

Pipeline: Renewals Q3

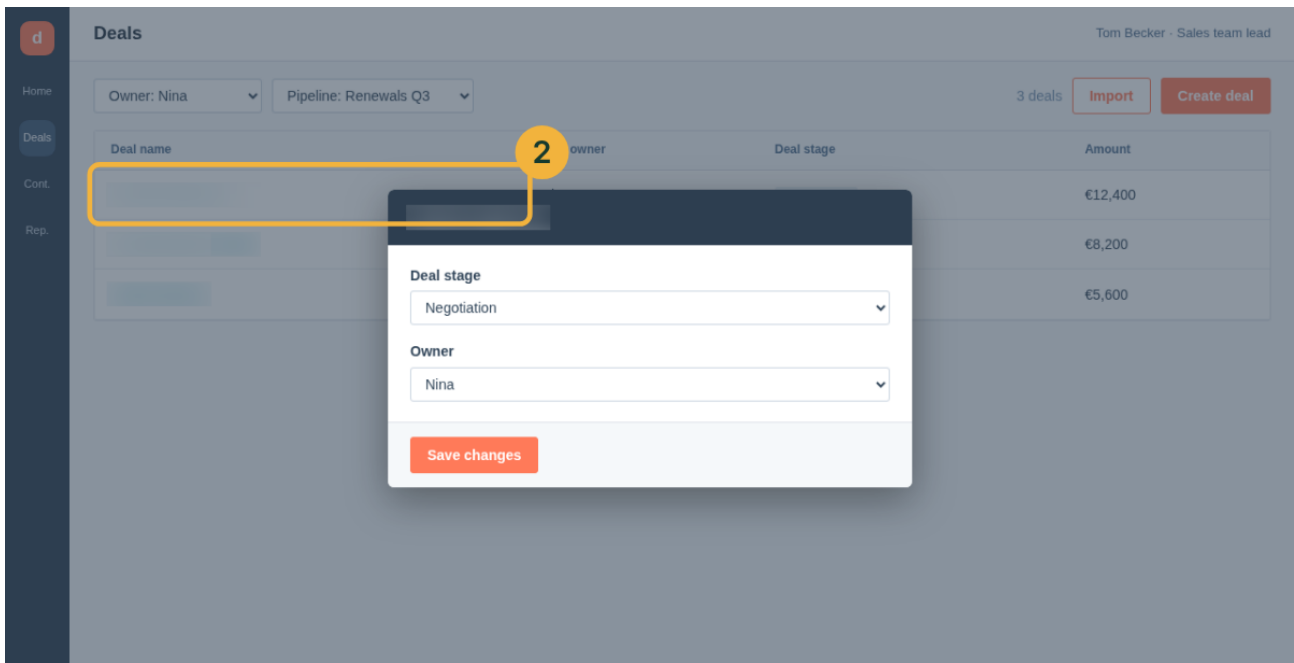
3 deals

Import

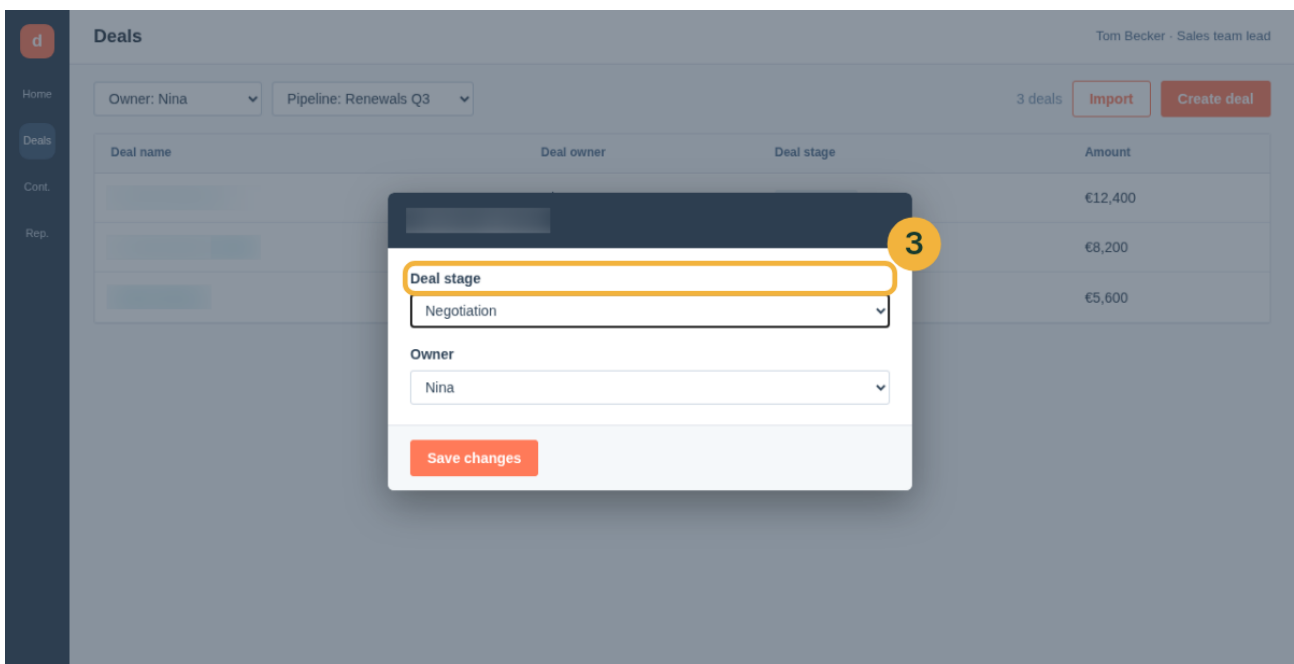
Create deal

Deal name	Deal owner	Deal stage	Amount
	Nina	Negotiation	€12,400
	Nina	Closed won	€8,200
	Nina	Proposal sent	€5,600

- 2 Open the rep's first deal. The deal window shows the account name at the top.



- 3 If **Deal stage** shows **Closed won**, do not reassign it: tell the sales lead and go to the next deal.



- 4 In the deal window, in **Owner**, select the new owner, for example Priya. The field shows Priya.

The screenshot shows the 'Deals' interface with a modal open for editing a deal. The modal has two dropdown menus: 'Deal stage' (set to 'Negotiation') and 'Owner' (set to 'Priya'). The 'Owner' dropdown is highlighted with a yellow circle and the number 4. Below the dropdowns is a 'Save changes' button. The background shows a table of deals with columns: Deal name, Deal owner, Deal stage, and Amount. The table has three rows of data.

Deal name	Deal owner	Deal stage	Amount
[Redacted]	[Redacted]	[Redacted]	€12,400
[Redacted]	[Redacted]	[Redacted]	€8,200
[Redacted]	[Redacted]	[Redacted]	€5,600

- 5 Click **Save changes**. "Deal updated." appears beside the button.

The screenshot shows the 'Deals' interface with the modal open. The 'Save changes' button has been replaced by a green 'Deal updated.' button, which is highlighted with a yellow circle and the number 5. The 'Deal stage' and 'Owner' dropdowns remain the same. The background table now shows only two rows of data.

Deal name	Deal owner	Deal stage	Amount
[Redacted]	[Redacted]	[Redacted]	€8,200
[Redacted]	[Redacted]	[Redacted]	€5,600

- 6 Repeat steps 2 to 5 for each deal that still shows Nina. Done when no open deal shows her as owner.

The screenshot shows a CRM interface with a sidebar on the left containing 'Home', 'Deals', 'Cont.', and 'Rep.'. The main header is 'Deals' with a user profile 'Tom Becker - Sales team lead' on the right. Below the header, there are filters for 'Owner: Nina' and 'Pipeline: Renewals Q3', and a summary '2 deals' with 'Import' and 'Create deal' buttons. A table lists deals with columns 'Deal name', 'Deal owner', 'Deal stage', and 'Amount'. Two deals are visible, both owned by Nina, with amounts of €8,200 and €5,600. A modal is open in the center, allowing updates to the 'Deal stage' (set to 'Negotiation') and 'Owner' (set to 'Priya'). The modal includes a 'Save changes' button and a confirmation message 'Deal updated.'.

Deal name	Deal owner	Deal stage	Amount
[Redacted]	Nina	[Redacted]	€8,200
[Redacted]	Nina	[Redacted]	€5,600