

How To Reassign A Contact In Synaptic Comparator?

Last Modified on 15/12/2017 11:51 am GMT

It is possible to reassign a contact to another adviser in your company. This will permanently move the contact record together with all research from your Synaptic Comparator account to the new advisers account.

To reassign a contact, simply find the contact you wish to reassign then click **Reassign** from the top menu.



You will see the following pop-up window:

A screenshot of a 'Reassign Clients' pop-up window. The window has a title bar with a person icon and the text 'Reassign Clients'. Below the title, it says 'Pick a new adviser then click 'Update' to reassign the client(s) below.' There are two radio buttons: 'All clients' (selected) and 'Selected client only'. On the left, there is a text area containing 'Example Test', 'Client TestA', and 'Example TestB'. On the right, there is a search box labeled 'filter advisers by name' with the text 'filter 'contacts'' inside. Below the search box is a list of advisers: 'Test@test.com', 'Test2@test.com', 'Test3@test.com', 'Test4@test.com', 'Test5@test.com', and 'Test6@test.com'. At the bottom right, there are 'Update' and 'Cancel' buttons.

Reassign Clients
Pick a new adviser then click 'Update' to reassign the client(s) below.

All clients
 Selected client only

Example Test
Client TestA
Example TestB

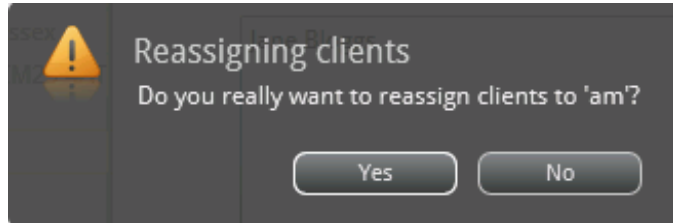
filter advisers by name
filter 'contacts'

- Test@test.com
- Test2@test.com
- Test3@test.com
- Test4@test.com
- Test5@test.com
- Test6@test.com

Update Cancel

To reassign only the contact that you have chosen, click on the adviser you wish to assign this contact to.

Next Click **Update**. You will see the following pop-up:



Click **Yes** to confirm.

You can also reassign all of your contacts to a different adviser by selecting **All Clients**. Please Note that this will permanently move **ALL** of your contact records in Synaptic Comparator.

If another adviser has reassigned contact records to your Synaptic Comparator account, these records will show up automatically the next time you log into Synaptic Comparator, or alternatively if you are already logged into your account, you can click **Refresh** from the top menu and these records will be collected immediately.

