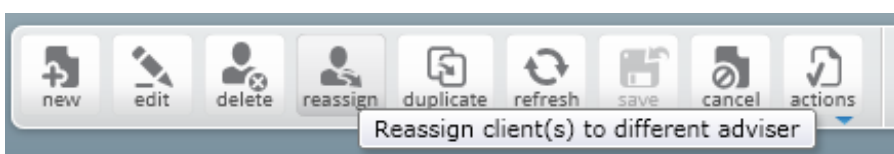


# Can I reassign clients to another user?

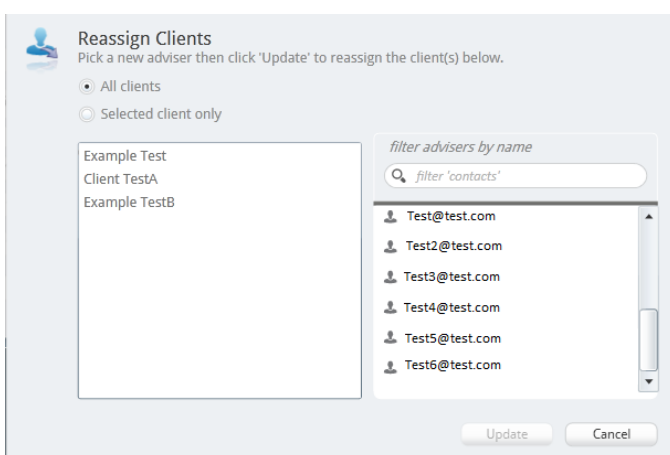
Last Modified on 15/12/2017 11:57 am GMT

In order to reassign clients you will need to access the contact sections within Comparator/Illustrator.

To do this, click on settings then organisation and users. Once the new page has loaded navigate to the **Contacts** section. Click the **Re-assign** button in the toolbar.



Choose the clients to be assigned to a different adviser.



The options are:

All clients – will move all the clients from one adviser to another

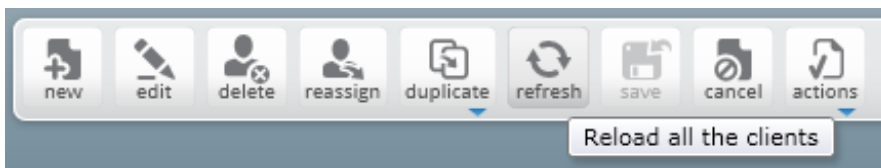
Selected client only – will only move the client that you have selected

Confirm which adviser the client(s) is going to be transferred to.

Once the adviser has been selected, click the **Update** button.

If the adviser, to whom these clients are being assigned is on Comparator/Illustrator when this is being done, he or she will need to click on the **Refresh** button on toolbar to

be able to see these clients.



If the adviser, to whom these clients are being assigned is not on Comparator/Illustrator when this is being done, the next time he or she logs on they will be able to see the assigned clients.

This will move all the activities with the client and any research completed by the previous adviser will remain in the previous adviser's name.

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