What can someone in a Modeller Journey Override role see and do?

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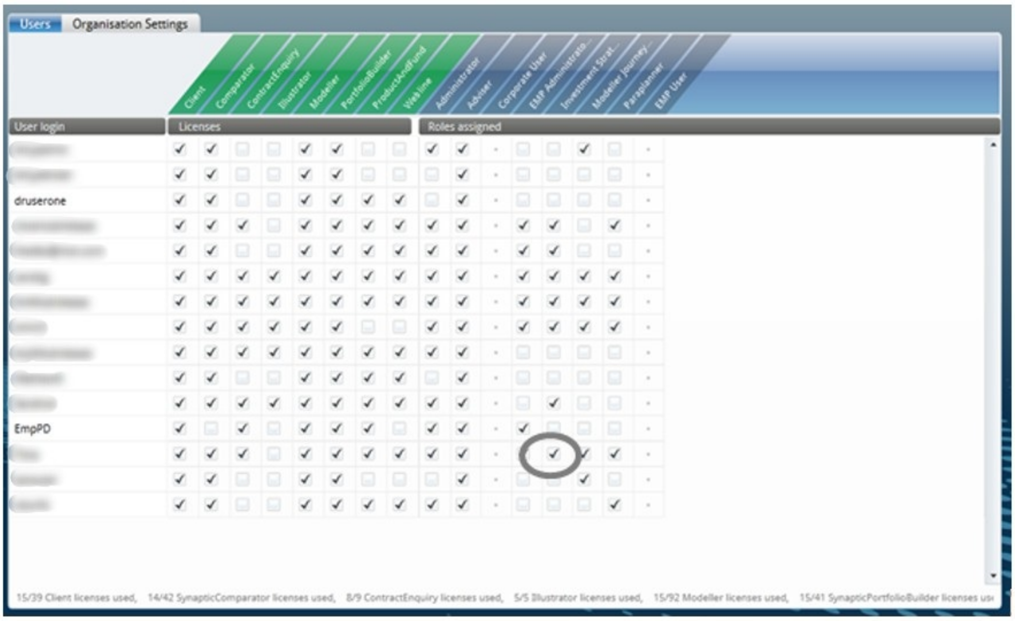
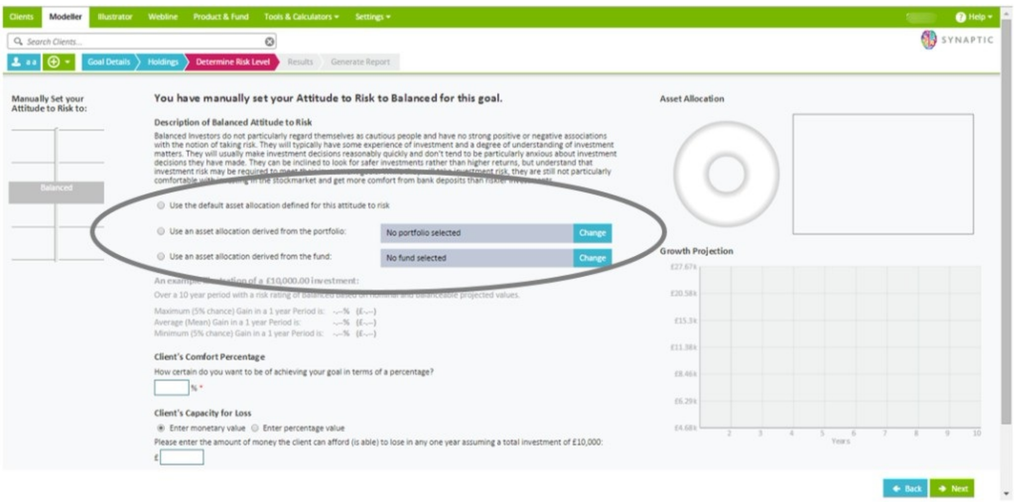
This role is for users that are allowed to define the Modeller journey taken in each goal i.e. depart from the default set at the organisation.

The administrator will have to tick the ‘Modeller Journey Override’ box.



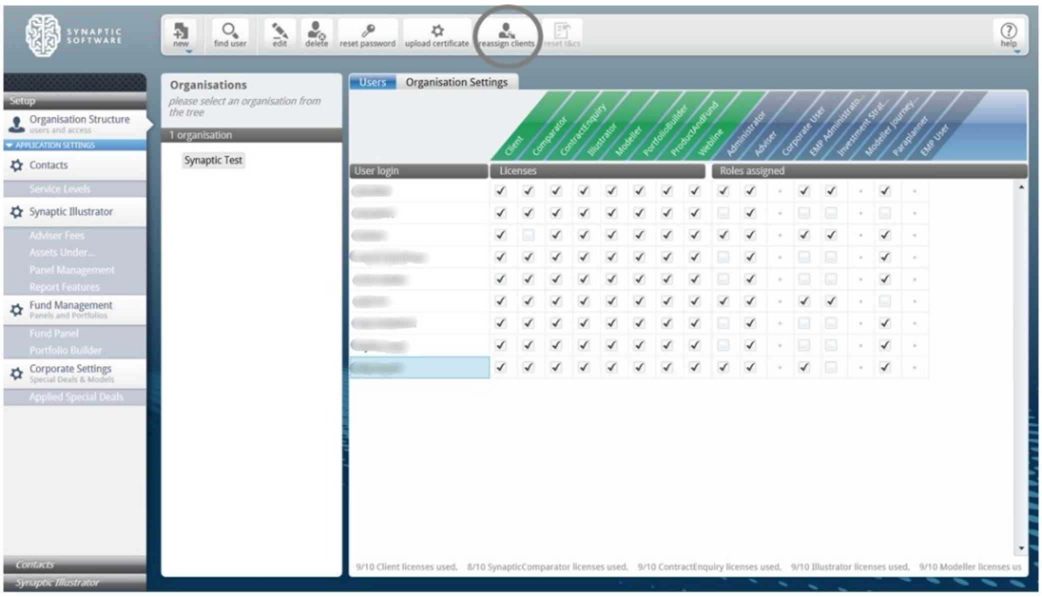
This will allow the user to make their own selection at the 10k screen as shown below:

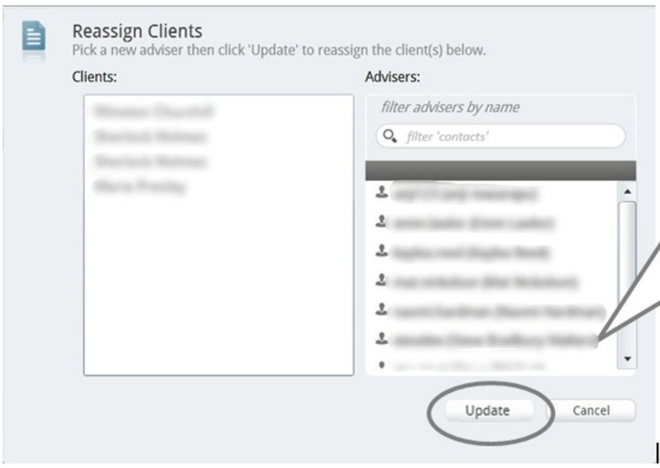


NB The administrator must ensure that they make the correct selection regarding the use of the Modeller Override Journey. Enabling this option allows the users to define their own modelling journey despite the parent organisation’s settings.

It is possible to assign clients between advisers that work within your organisations. This might be useful if an adviser has left the company.

To reassign clients, click on the organisation and the user whose clients need to be reassigned, then click the **reassign clients** button in the ribbon bar.





Once the user has been selected, the administrator will be able to see all the clients for that user. Make the selection of the adviser reassigned and click on **update**.

If reassigning clients, when the selection is made, the software will reassign all clients under that adviser and will search every user with an adviser role within the organisation including below and above it as well.

An adviser can reassign clients individually, please see the “*Synaptic Client User Guide*” for further details.