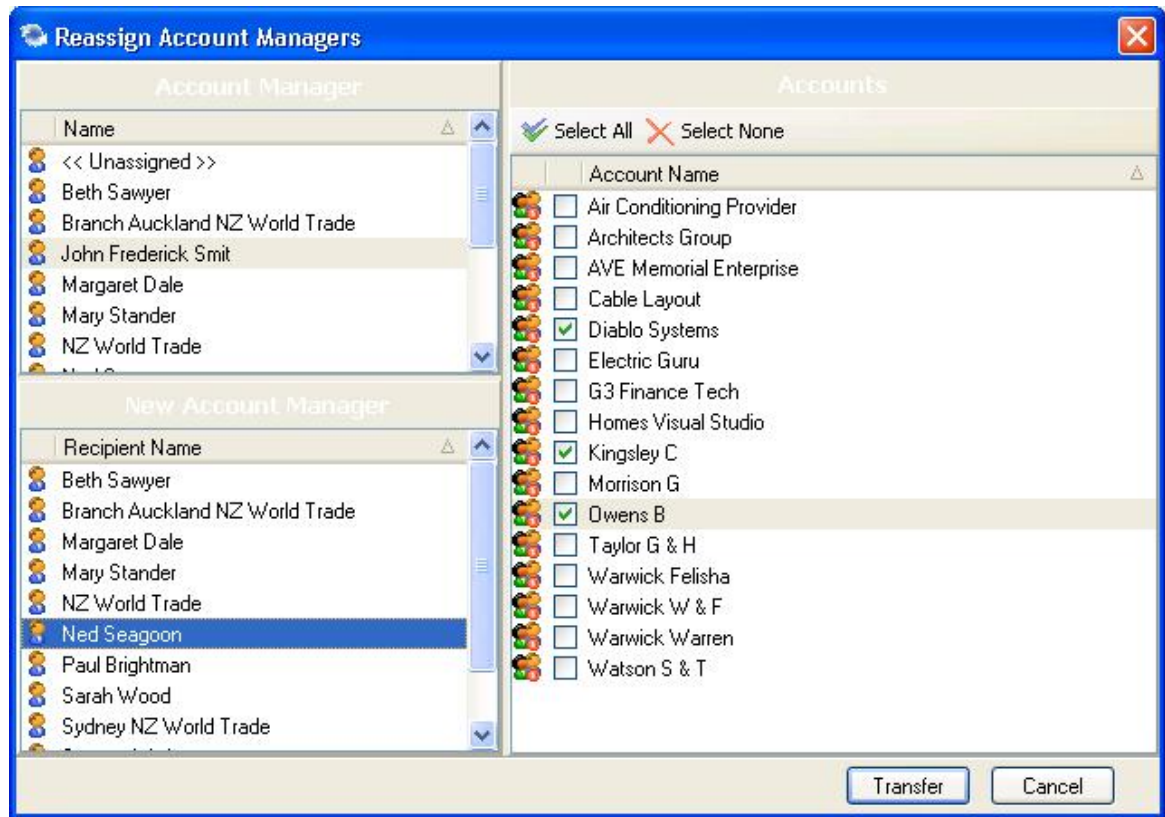


## Reassign Account Managers

Accounts can only be reassigned if the user has permissions to do this. Please ask your system administrator to grant you permissions, if required.

### To reassign accounts to different account managers:

- Click on 'Tools' at the top of the main Forté CRM screen.
- Select 'Reassign Account Managers'.



- The top left hand window displays current account managers. Select the account manager you want to move **accounts from**. The accounts for that account manager will show in the right hand window.
- Select the accounts to transfer by checking the boxes beside the account name.
- In the bottom left hand window, select the account manager you wish to transfer the **accounts to**.
- Click 'Transfer' at the bottom of the screen.
- The selected accounts will be transferred to the new account manager.

*Note : Account transfer requires a sync from our computer to the server. Transferred accounts will be visible for the new account manager the next time they log into Forté CRM following the synchronization.*