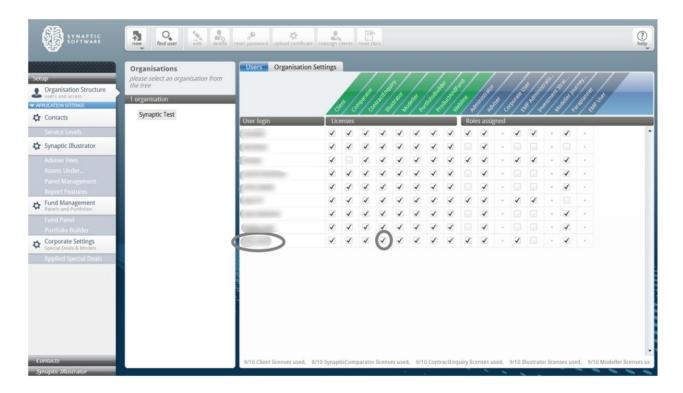


Administrator licence holders have been given a number of licences to give to users at the organisation by your parent organisation. There are several licence types that control which parts of the system and which applications particular users have access to. In order to assign licences to the users, simply highlight the user and tick the relevant licence type.



The different possible licences are as follows;

**Client** – this gives users access to the Synaptic client tab and is needed in order to create clients and holdings. All users will generally have this functionality unless the user that is purely an administrator of the software and does not need to see client data.

Administrator licence holders have been given a number of licences to give to users at the organisation by your parent organisation. There are several licence types that control which parts of the system and which applications particular users have access to. In order to assign licences to the users, simply highlight the user and tick the relevant licence type.

The different possible licences are as follows;

Client – this gives users access to the Synaptic client tab and is needed in order to

create clients and holdings. All users will generally have this functionality unless the user that is purely an administrator of the software and does not need to see client data.

Comparator – this gives a user access to the Comparator application

**Contract Enquiry** – this allows the user to conduct contract enquiry on a client's policies subject to the firm having accepted the required agreements – see Contract Enquiry User Guide for more details

**Analyser** - this allows the user to conduct income analysis research and income drawdown product comparison

**Modeller** - this gives a user access to the Modeller application and allows the use of the Modeller calculators in the Synaptic Client interface

**Portfolio Builder** - this gives a user access to Portfolio Builder & Wizard in the Synaptic Client interface, it also allows the input of funds into a client's holdings. Again most users should be given this licence if they have a licence for one of the applications

**Product and Fund** – this enables the user to access Product and Fund from the Synaptic Client interface and take client data over

**Webline** - this enables the user to access both Webline Annuities and Webline Protection from the Synaptic Client interface and take client data over.

If child organisations have been created, they need to have licences, which will come out of the total granted by the parent organisation. In order to do this, select the organisation and then press the "licences" button in the ribbon bar where licences can be redistributed across child organisations.

P Organisation Structure users and access	please select an organisation from the tree				100		2	/.	-	Se Series					e / ser	star and	and a series	et of a	
LICATION SETTINGS	1 organisation		8	er/s	STRAT C	SECOT IN	5550- 2	Sell a	Stoll a	chiller at	tin the	stirt 2	steel d	STRON 2	\$8 PD 4	sec.	ACT AL	serie the of	
Contacts	Synaptic Test	User login	Lio	enses	<u> </u>	í.	Role	es assi	igned		1		1						
Service Levels		1 mm mm	1	1	1	1	1	1	1	1	1	1		1	1		1		
Synaptic Illustrator		C	1	1	1	1	1	1	1	1		1							
Adviser Fees			1		1	1	1	1	1	1	1	1		1	1		1	- X.	
		Construction of the local division of the lo	1	1	1	1	1	1	1	1		1					1		
		(	1	1	1	1	1	1	1	1		1					1		
		Control Inc.	1	1	1	1	1	1	1	1	1	1		1	1				
Fund Management Panels and Portfolios		Contraction of Contraction	1	1	1	1	1	1	1	1		1					1	*	
		Concession in the local diversion of the loca	1	1	1	1	1	1	1	1		1					1		
Corporate Settings Special Deals & Models		· · · · ·	1	1	1	1	1	1	1	1	1	1		1			1		
Special Deals & Models Applied Special Deals																			
	1																		

This will open the "Manage Licences" dialogue in order for to redistribute licences across the child organisations. Click on the triangle next to the organisation's name to open out the tree of child organisations.

	Organisations please select an or	rpinisatio	n from	Users	Organis	lation Setti	nes .		/./	//	1.1		//.	/.*/	× /.×/	//	7
Manage Licenses	- I argumenters				X	(r.											
Organisation Licenses available to		Cli In use	ent Granted	Comp In use	Granted	Contract In use	Enquiry Granted	Illus In use	rator Granted	Mod In use	eller Granted	Portfol In use	oBuilder Granted	Product In use	AndFund Granted	-	bline Gran
Synaptic Test		9	10	8	10	9	10	9	10	9	10	9	10	9	10	9	10
1																	
Tetal		,	10		10	,	10	,	10	,	10	,	10	,	10	,	10
Total		,	10	·	10	,	10	,	10	,	10	,	10	,	10 Indistribute L	, kenses	10 (Car

Select the child organisation the licences should be added to. Click into the "Granted" column for each of the licence types which are to be allocated to the child organisation and enter the number of licences they have been allocated.

SOFTWARE	new find user	edit		censes	_	_	_	_	_	_	_	_	_	_	_	_	? hel
p	Organisations please select an organisation from the tree				Organi	sation Set	tings		/\$/	//	v / er /		//~	le <sup>ot</sup> l	5 / 5 <sup>5</sup> /		
Manage Licenses																	
Organisation Licenses available to		Cli In use	ent Granted	Comp In use	arator Granted	Contrac In use	tEnquiry Granted	Illus In use	trator Granted	Moc In use	eller Granted	Portfoli In use	ioBuilder Granted	Product In use	AndFund Granted	We In use	ebline Grante
Synaptic Test		9		8	10	9	10	9	10	9	10	9	10	9	10	9	10
Total		9	10	8	10	9	10	9	10	9	10	9	10	9	10	9	10
Total		9	10	8	10	9	10	9	10	9	10	9	10		10 Redistribute Li		10 Cano

Once all of the licences have been added to all the child organisations, click on the "Redistribute Licences" button at the bottom of the screen. This will remove the extra licences at this organisation and give them to the child organisations as specified. If there is not enough spare licences at this organisation, then the operation will fail and it needs to be started again.

Comparator – this gives a user access to the Comparator application

**Contract Enquiry** – this allows the user to conduct contract enquiry on a client's policies subject to the firm having accepted the required agreements – see Contract Enquiry User Guide for more details

**Modeller** - this gives a user access to the Modeller application and allows the use of the Modeller calculators in the Synaptic Client interface

**Portfolio Builder** - this gives a user access to Portfolio Builder & Wizard in the Synaptic Client interface, it also allows the input of funds into a client's holdings. Again most users should be given this licence if they have a licence for one of the applications

**Product and Fund** – this enables the user to access Product and Fund from the Synaptic Client interface and take client data over

**Webline** - this enables the user to access both Webline Annuities and Webline Protection from the Synaptic Client interface and take client data over.

If child organisations have been created, they need to have licences, which will come out of the total granted by the parent organisation. In order to do this, select the organisation and then press the "licences" button in the ribbon bar where licences can be redistributed across child organisations.

This will open the "Manage Licences" dialogue in order for to redistribute licences across the child organisations. Click on the triangle next to the organisation's name to open out the tree of child organisations.

	Organisations please select an or the true		n from		Organi	and an and	100		1./	//	5/0/		17.	1.51	s//s/	/	Ζ.
Manage Licenses	· · · · organitation		ent	Com	varator	Contract	And the second		rator	110	kiler	Dectfol	loBuilder	Bradare	UndFund	-	bline
Organisation Licenses available to			Granted	In use	Granted		Granted	In use	Granted		Granted	In use	Granted	In use	Granted	In use	Gran
Synaptic Test		9	10	8	10	9	10	9	10	9	10	9	10	9	10	9	10
Total			10		10		10	,	10	,	10	,	10		10		10
FECH		,	14	÷			10	,			10		10	,	the local division in which the	kenses	Car
														0	ledistribute L	kenses)	C

Select the child organisation the licences should be added to. Click into the "Granted" column for each of the licence types which are to be allocated to the child organisation and enter the number of licences they have been allocated.

Once all of the licences have been added to all the child organisations, click on the "Redistribute Licences" button at the bottom of the screen. This will remove the extra licences at this organisation and give them to the child organisations as specified. If there is not enough spare licences at this organisation, then the operation will fail and it needs to be started again.