What can someone in an Adviser role see and do?

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A role dictates 2 things;

- What a user can see
- What a user can do

Combined they allow a user to have many functions within the software.

Adviser Role

This role allows the user into the applications for which they hold a licence e.g. Modeller, Comparator etc. and a read only view of the administration functions.

- User can create, edit, save and delete clients
- User can only see the clients you have created but can reassign clients to another adviser within your organisation or an adviser in your parent organisation
- User can conduct research
- In Setup (Comparator/Illustrator interface) the user can see a read only view of:

  Adviser charging

  Assets under management

  Panel management

  Report features

  Fund panel

  Service levels

  Applied special deals

- In Setup (Comparator/Illustrator interface) the user can create portfolios and share if desired
- In Synaptic Settings the user can see a read only view of:

  Modeller Customisation

  Custom Asset Types

  Fund Universe (fund panel in Comparator/Illustrator interface)

- In Synaptic Settings the user can create portfolios and share if desired