What can someone in a Paraplanner 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.

Paraplanner

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.

This is exactly the same as an adviser but the user can see the clients of all advisers in your organisation and child organisations.

- 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