FinPro Digital

INTERACTIVE MODELS | USER MANUAL

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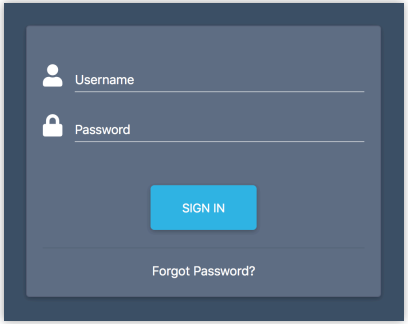
Gaining Access to the Interactive Models site

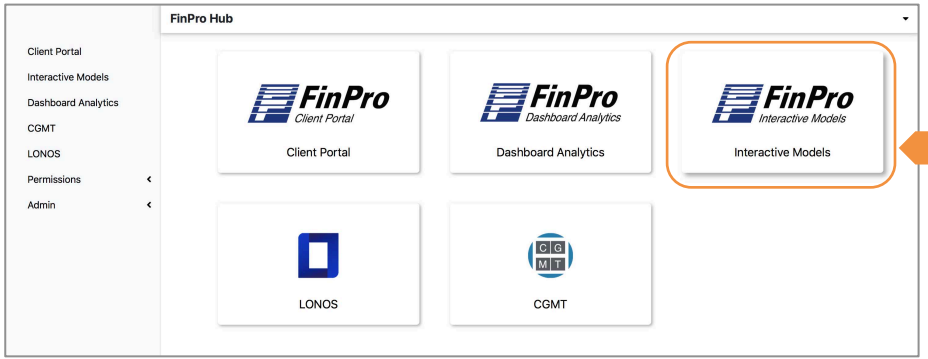
Before logging in, you will receive 2 separate emails containing your username and password, as well as a link for the site.



Click the link in the email or paste it into your browser. You will be brought to the SIGN IN page as shown to the left.

Enter your username and password assigned to you in the email and click SIGN IN.

You may receive a prompt for dual authentication. If so, an email will be sent with the one-time code. Please check your spam folder if you do not see it.



After signing in, you will land on the FinPro Hub shown below.

Click on Interactive Models

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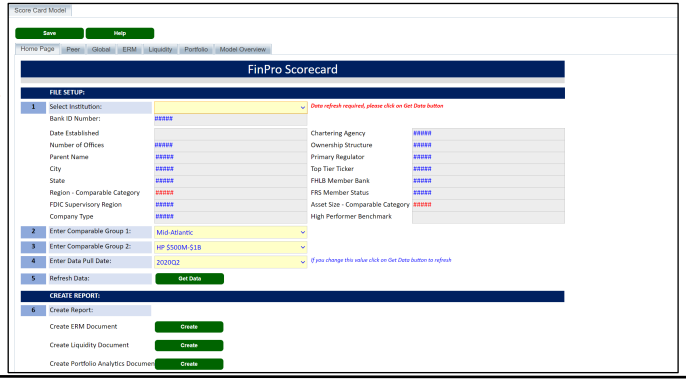
FinPro Digital – Interactive Models Site Access (continued)

Click on the FinPro Scorecard Model

While the model is loading a progress screen will appear that states **Your model is loading…** *(This may take up to 1 minute)*

The FinPro Scorecard will load



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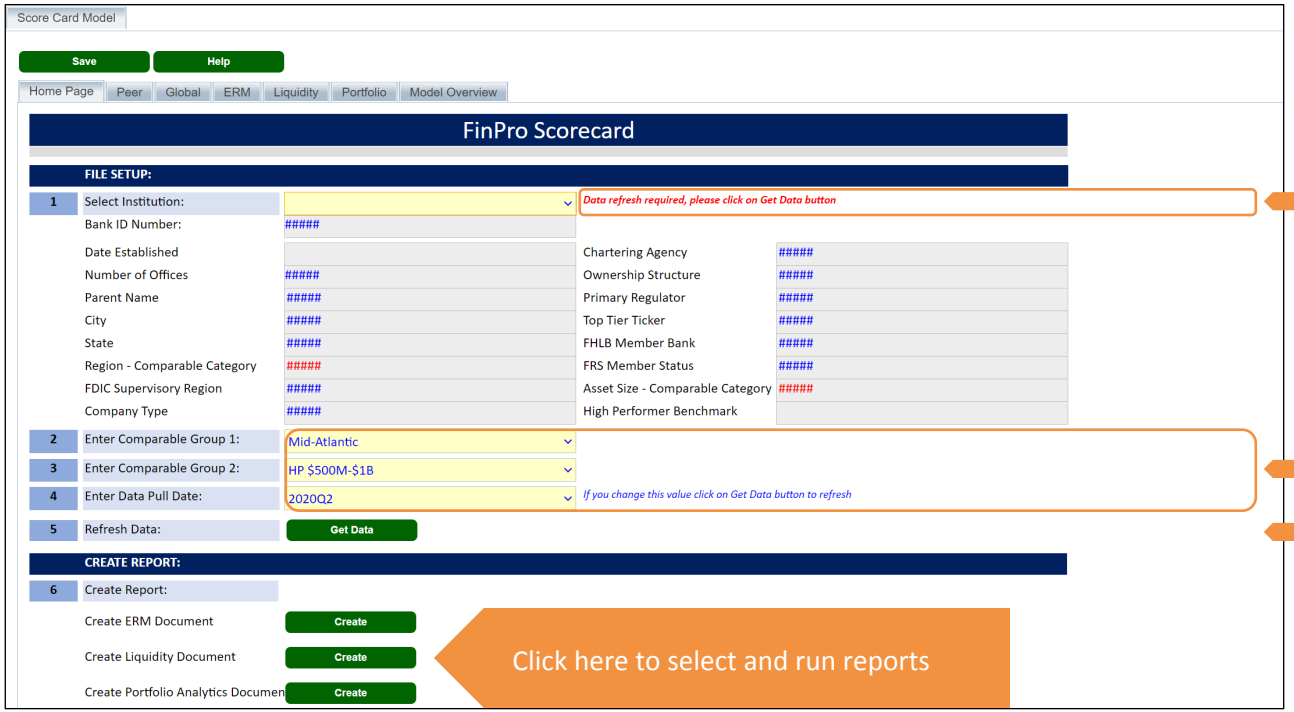
FinPro Digital – Scorecard Module Home Page



Select bank from drop down list and click **Get Data**

**Wait until data refresh prompt loads*

After data refresh loads select:

Comparable Group 1

Comparable Group 2

Data Pull date

Click **Get Data**

**Wait until data refresh prompt loads*

To run a report, click on the desired report type and click **Create**

This will take a few minutes for the report to complete. A pop up box will alert you when the report is complete and ready for download.

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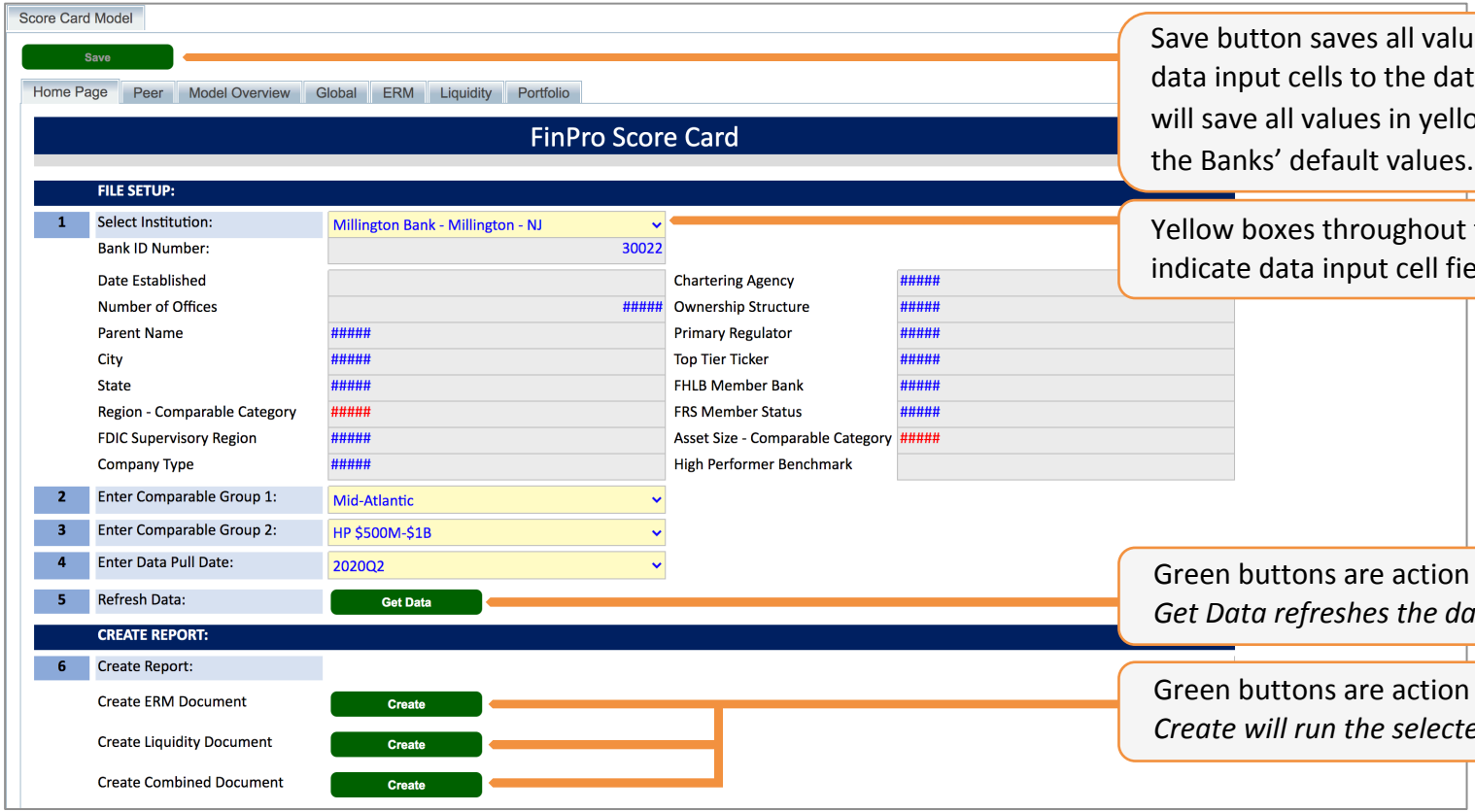
FinPro Digital – Scorecard Module - Tips for success



Save button saves all values in yellow data input cells to the database. This will save all values in yellow cells as the Banks' default values.

Yellow boxes throughout the model indicate data input cell fields.

Green buttons are action buttons
Get Data refreshes the data

Green buttons are action buttons
Create will run the selected report

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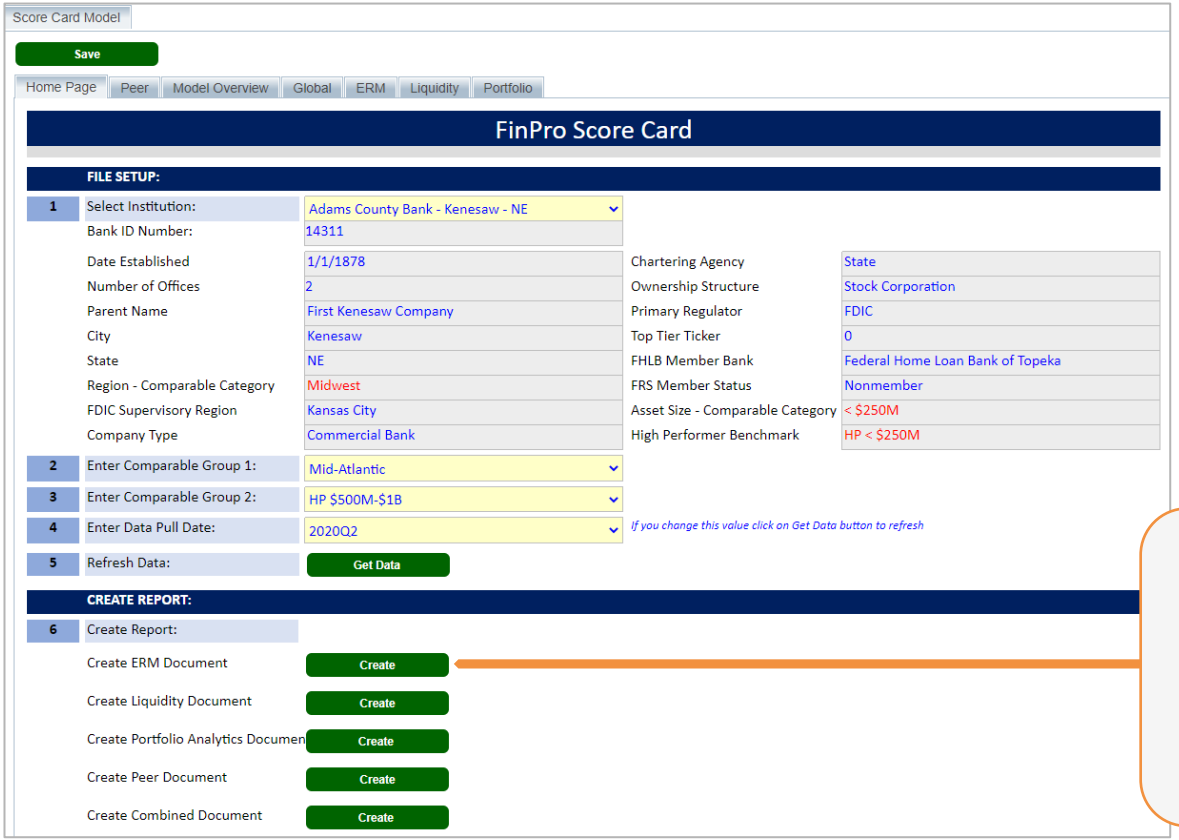
FinPro Digital – Scorecard Module - Reports



To run a report, click on the green create button for the desired report. It will take a few minutes for the report to complete. A pop-up box will alert you when the report is complete and you can download it to your local machine.

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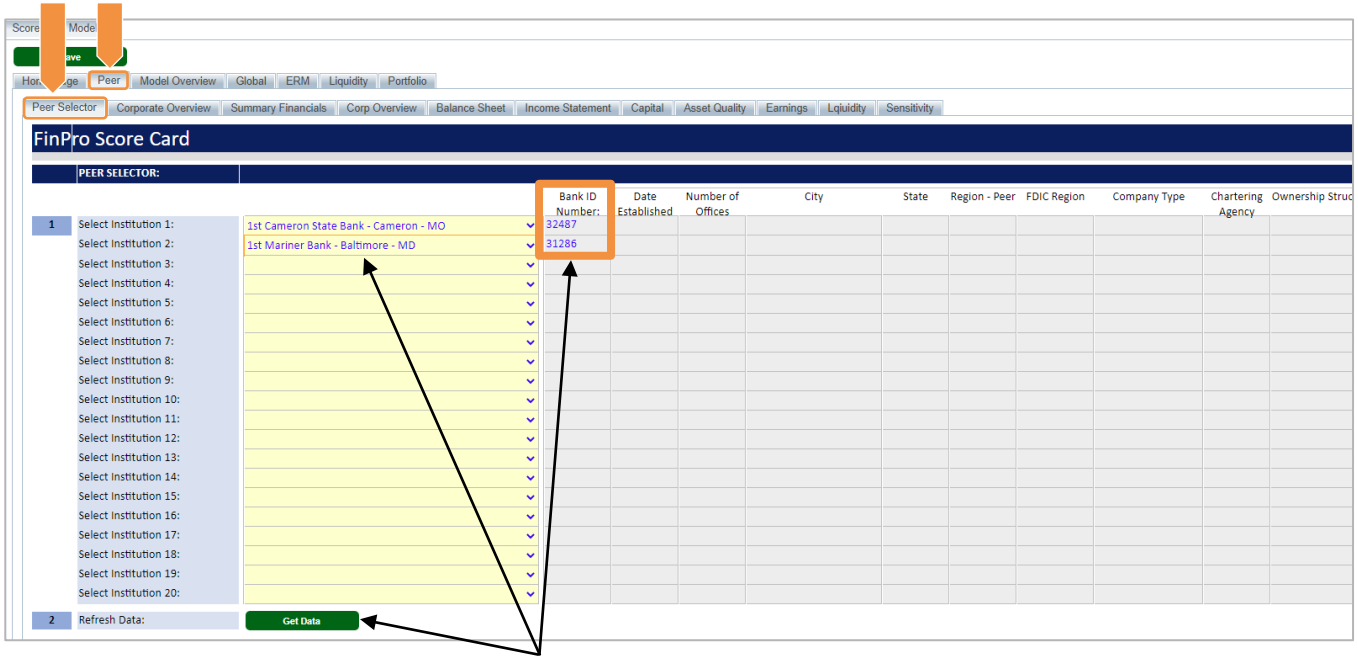
FinPro Digital – Scorecard Module - Peer Selection

- The peer selector tab allows the Bank to add up to 20 custom peer banks from the dropdown menu.
- The dropdown peer selectors are the yellow fields illustrated below.



Select peers from drop down list and click **Get Data** **Wait until bank ID number(s) are displayed before clicking Get Data*

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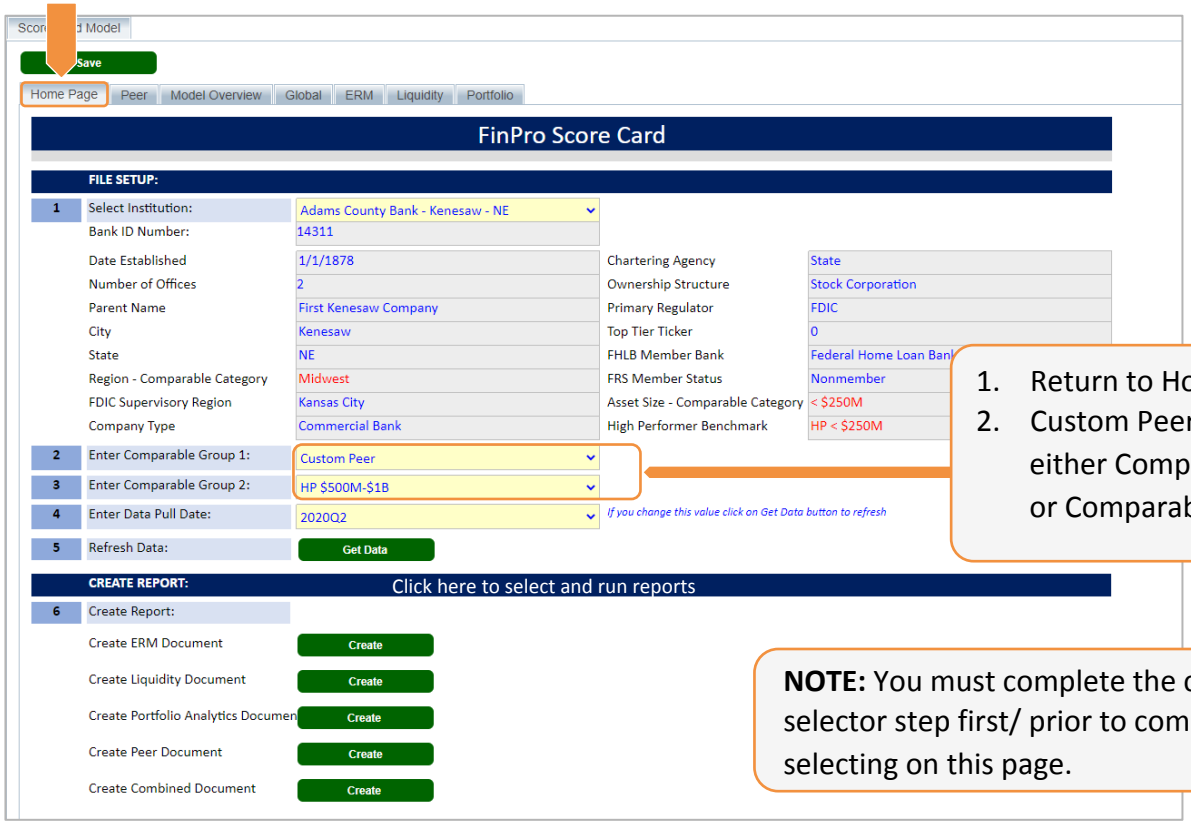
FinPro Digital – Scorecard Module - Peer selection (continued)



1. Return to Home Page
2. Custom Peer can be chosen for either Comparable Group 1 or Comparable Group 2

NOTE: You must complete the custom peer group selector step first/ prior to coming back and selecting on this page.

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