FinPro
Digital

INTERACTIVE MODELS | USER MANAGEMENT

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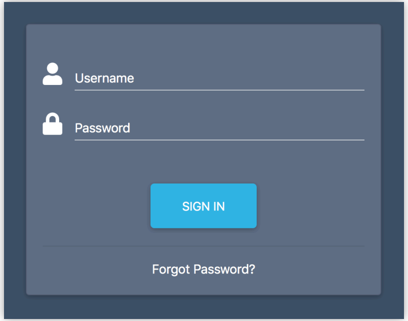
FinPro Digital – Interactive Site Access

Gaining Access to the FinPro Hub site

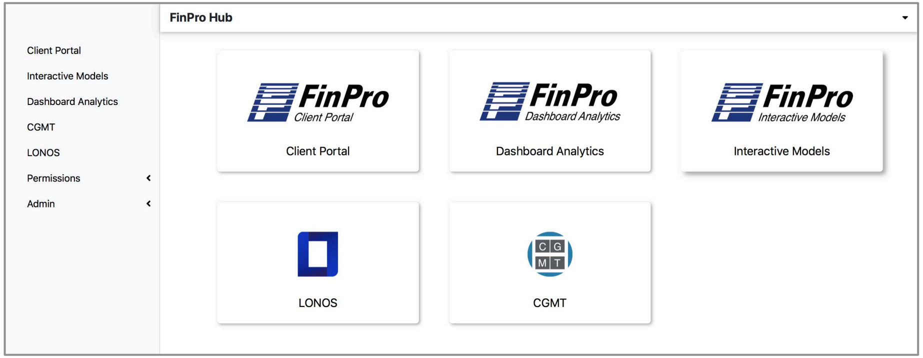
Before logging in, you will receive 2 separate emails containing your username and password, as well as a link for the site.



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.

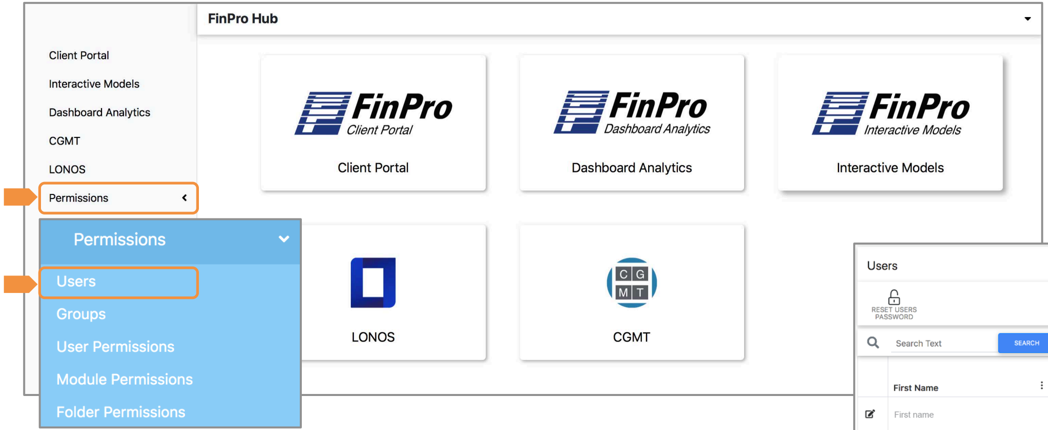
Enter your username and password assigned to you in the email and click SIGN IN.

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.

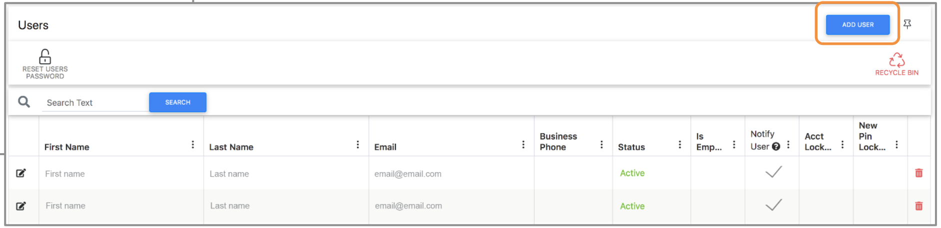


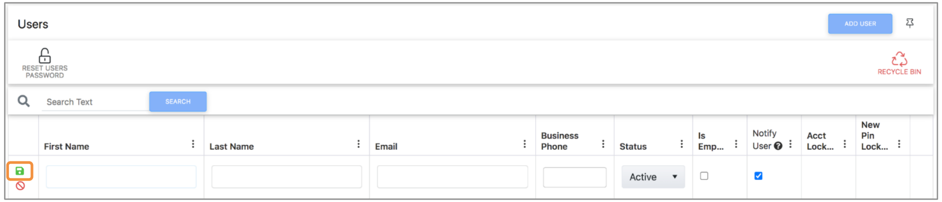
FinPro Digital – Adding Users

To add users and customize their permissions, go to the menu bar on the left of the FinPro Hub landing page and click on Permissions, then click on ***Users***.



The user window is where you can see all of your users as well as add a new user. To add a new user, click Add User.

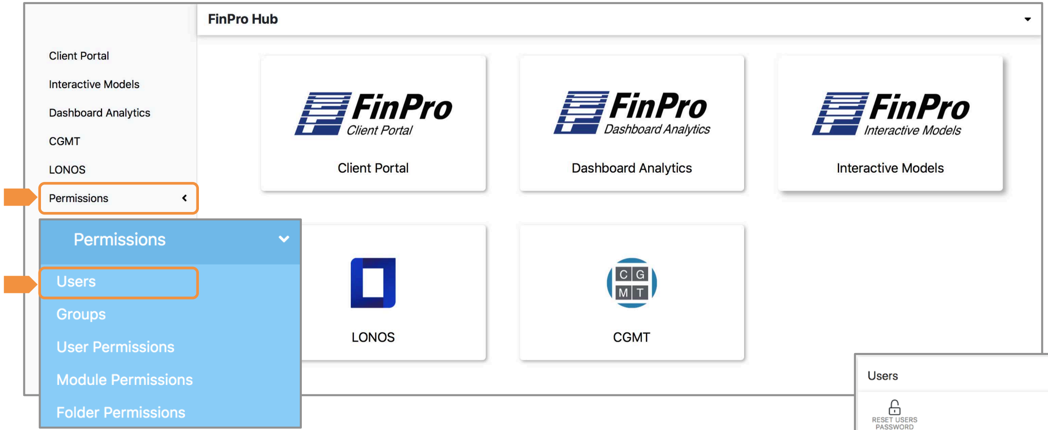




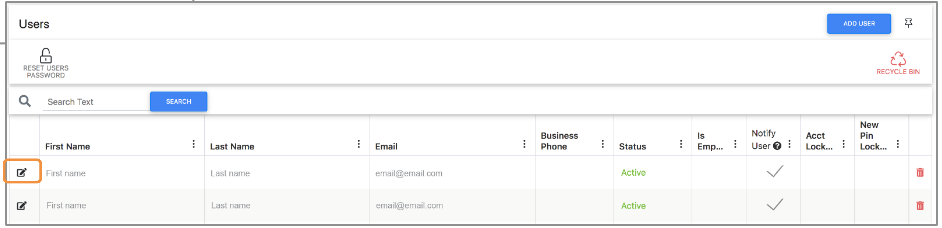
Add the first name, last name, email and phone number, and then select the save icon to save the new user.

FinPro Digital – Editing Users

To edit users and customize their permissions, go to the menu bar on the left of the FinPro Hub landing page and click on Permissions, then click on ***Users***.



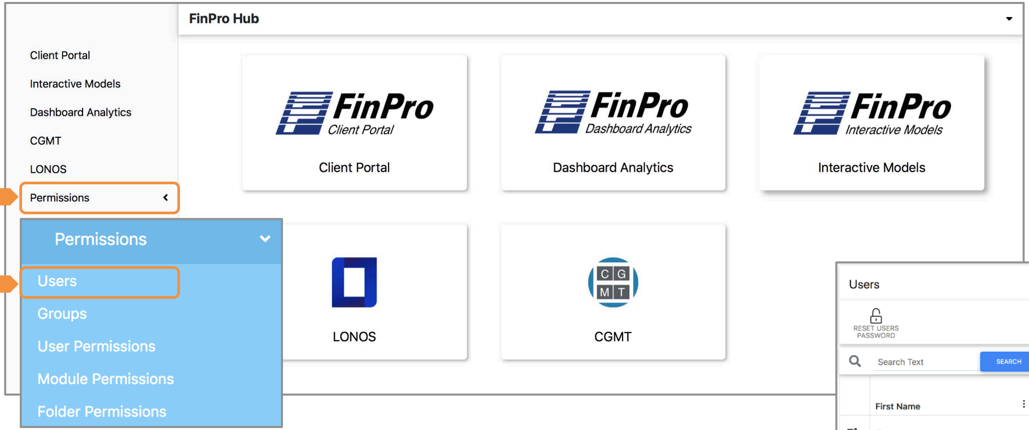
The user window is where you can see all of your users as well as add a new user. Click the to edit user information.

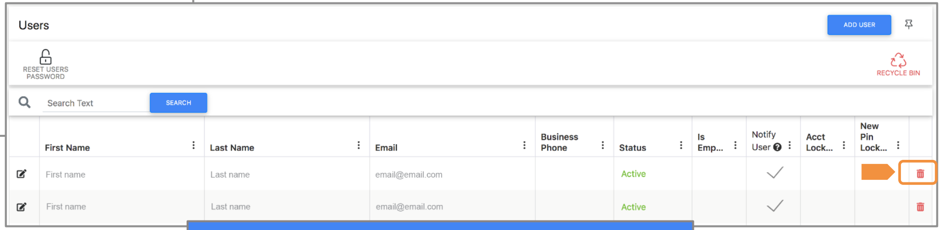


You will now be able to change the users first name, last name, phone number etc. and then select (save icon) to save changes.

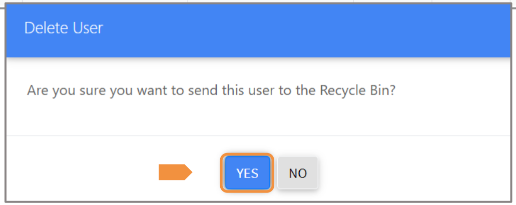
FinPro Digital –Removing Users

To remove users, go to the menu bar on the left of the FinPro Hub landing page and click on Permissions, then click on ***Users***.





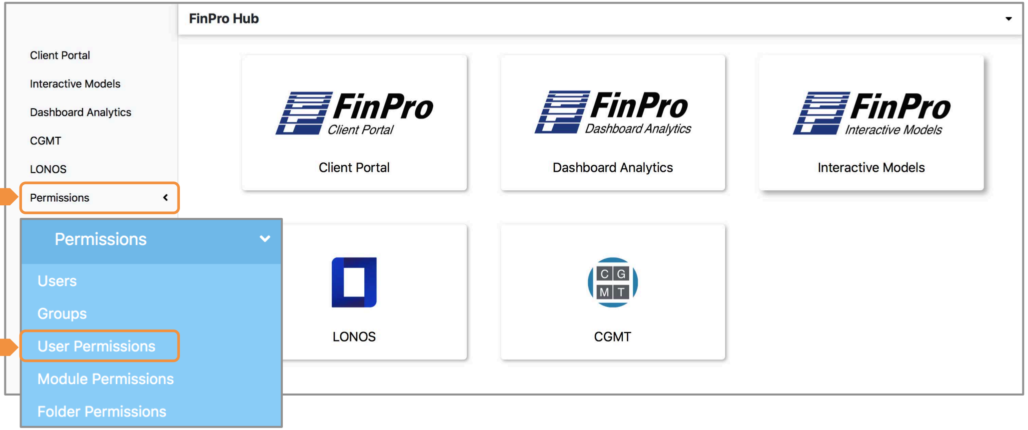
The user window is where you can see all of your users as well as add a new user. Click the icon to remove a user account.



You will then be prompted to move the user to the recycle bin. This will remove all user access.

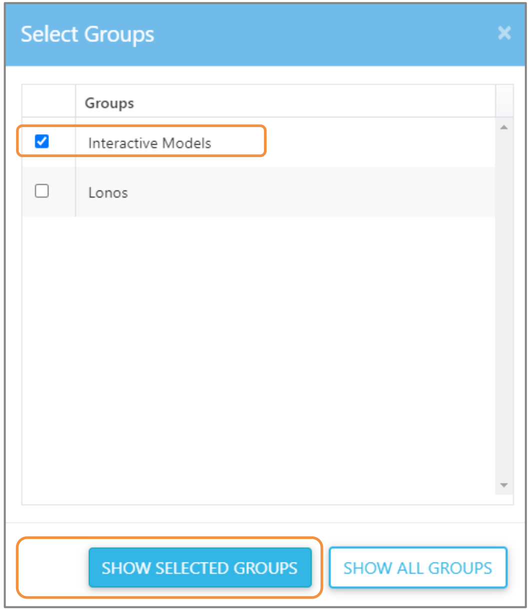
FinPro Digital – Establishing Permission for Users

Once a user has been added to the site it is time to permission each user into their selected module. In the menu bar on the left, click on Permissions, then click on ***User Permissions***.



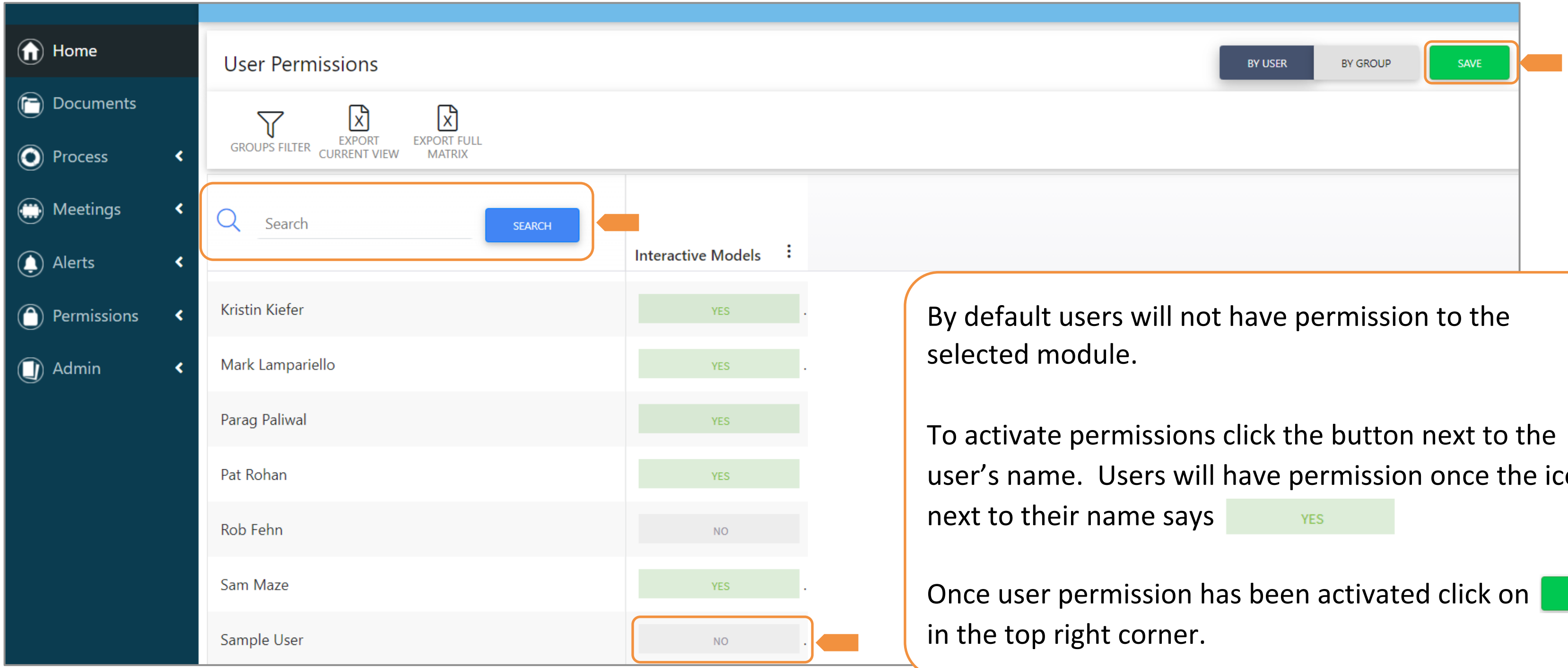
The Select Group window will appear where you can see which modules are available to permission the user to have access to.

Select the modules you would like to permission users into and click ***Show Selected Groups***.



FinPro Digital – Establishing Permission for Users

Users can be located utilizing the Search bar or by selecting from the list below.



By default users will not have permission to the selected module.

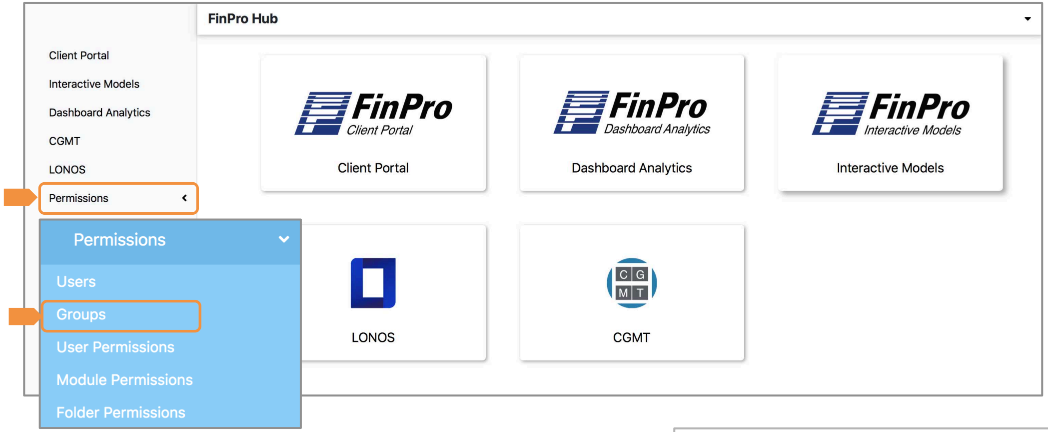
To activate permissions click the button next to the user's name. Users will have permission once the icon next to their name says YES

Once user permission has been activated click on SAVE in the top right corner.

FinPro Digital

FinPro Digital – Reviewing Permission for Users

To view a list of users who have been permissioned into the site, click on Permissions in the left menu bar, then click on ***Groups***.



This will take you to the Groups Page. Click on the icon to view a list of all users currently permissioned into the selected Module.