USER PROFILES

User Profiles provide a way to set the level of access a User can have to various Modules, areas and functions within FinCalc. Full details for each User are available upon request.

Users (chargeable)

Most FinCalc licence holders will be set up with a 'User' Profile. The User may have access to all Modules within the FinCalc Suite, or the User could be limited to a specific Module; for example, Transvas User or Cashflow User. The User Profile does not allow access to 'Security Settings' or 'Company Settings' and they cannot 'Manage Users' within FinCalc.

Dependant on the Modules they have access to, a User can add, edit or view Client Profiles, Transvas Cases or Cashflows. They can also edit any Clients, Cases and Cashflows shared with them. They are able to order new Case Packs within the Transvas with TVC Module. They can only delete clients which they 'own', and this is usually applied to records they have created.

Once a licence has been issued, the Power User or IT Admin User can then allocate one of the following User Profiles: User, Transvas User, Cashflow User or Cashflow Junior. For more information on this please contact our Sales team.

Power User (chargeable)

A Power User has full range of access to all functions on FinCalc, including access to 'Security Settings', 'Company Settings' and to any modules the Company holds a license for. The Power User Profile combines the module access of a User Profile and the security access of the IT Admin User Profile (see below). Power Users can also access FinCalc from anywhere on any web enabled device, even where a company has a specified whitelisted IP range(s). Due to the high level of security access it is recommended this role is for senior staff. Power Users can delete any records relevant to the Modules they have access to; including deletion of Clients, Cashflows and Transvas Cases.

IT Admin User (non-chargeable)

This User cannot access any Clients or associated records. IT Admin User can control the setup of FinCalc and are generally only required in a larger business. IT Admin User can specifically access the 'Company Settings', 'Security Settings' and 'Manage Users' within FinCalc.

View Only User (non-chargeable)

View Only Users can view Clients and associated records (including Cases, Cashflows and completed Reports) that they have been granted access to. They cannot generate new reports, add or edit any records.

Adviser Setting

The Adviser License can be set for any User across all FinCalc Modules and can be set up and managed via the 'Manage Users' screen. This allows reports to be generated showing the Adviser's name on the front cover. For example, "Prepared for Mr John Smith, a client of Mike Jones".

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