COMPANY SET UP IN FINCALC

During this webinar session we will cover how to fully set up your company on FinCalc, primarily for Cashflow however we will also cover Manage Users and Security Settings. All of these features allow you to have full control not only of all users within your company, but also the cashflow calculations.

COMPANY SET-UP

- Brief look into how to add Client Tiers and Teams.
- Adding Attitude to Risk, Growth Sets and Assumption Sets.
- Discussing the benefits of the above.

MANAGE USERS

- How to navigate through the Manage Users Screen, including adding Bespoke User profiles.
- Allocating Users to User Profiles, and Teams.

SECURITY SET-UP

- How to navigate through the Security setting, including two step verification, IP Whitelists and password settings.
- A brief look into restricting User access.

HOW YOUR SET-UP AFFECTS YOUR CASHFLOW

- A look at how your Company settings pull through to Clients and Cashflows
- A brief look at Override Assumptions and the user’s restrictions on this input.

SESSION DURATION

This is a single 30-minute session with the opportunity for questions at the end of the session.

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