



myFinLocker – Company Administration
User Guide

This myFinLocker Company User Guide provides an overview and instructions, per major feature listed in left hand navigation window. Note: Please refer to the myFinLocker Consumer User Guide for the Consumer User Experience overview and instructions. The following sections are included:

Table of Contents

- 1. Logging in 3
- 2. Distributing Lockers – Enrolling Your myFinLocker Customers (Consumers) 4
 - 2A. Filter Button 5
 - 2B. URL Invitation / Common Enrollment Link 5
 - 2C. Batch File Upload Invitations – Multiple Invitations 6
 - 2D. Individual Invitations – Single Invitation 7
 - 2E. Bulk Update Management – Reassignment of myFinLocker Company Users 8
- 3. Business Intelligence Data Management – myFinLocker Aggregate Progress, Readiness 9
- 4. User Management - Administration 10
 - 4A. Users - Permissions and Personalization 10
 - 4B. Reset Password 12
 - 4C. Creating Roles 13
- 5. Contact 14
- 6. Email Theme 15
 - 6A. Logo 15
 - 6B. Subject and Body Text 16
 - 6C. Preview Email 17
- 7. Theme (Color Scheme for your financial locker) 19
 - Tips for Branding your myFinLocker 19
 - Layout Mapping 19
- 8. Offers and Content Widgets 20
- 9. Notifications 21
- 10. Shared Files – Accept, Download, Access 21

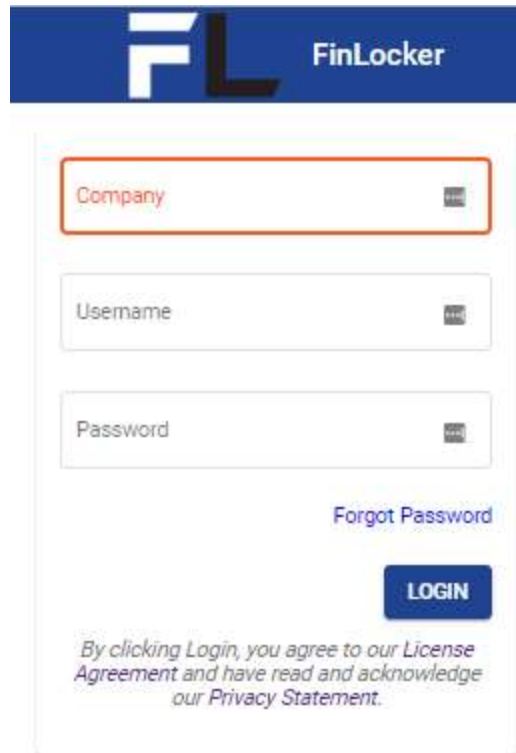
1. Logging in

Go to the ULR link below to login to the myFinLocker Company administration portal:

<https://portal.finlocker.com/admin/login>

Enter the following:

1. Your Company code provided by your Administrator and
2. Your Username and Password



The screenshot displays the FinLocker administration login interface. At the top, there is a blue header with the 'FL' logo and the text 'FinLocker'. Below the header, the login form is contained within a white box with a light gray border. It features three input fields: 'Company' (with a red border), 'Username', and 'Password'. Each field has a small icon on the right side. Below the 'Password' field, there is a blue link for 'Forgot Password'. A prominent blue 'LOGIN' button is positioned below the 'Forgot Password' link. At the bottom of the form, a disclaimer reads: 'By clicking Login, you agree to our License Agreement and have read and acknowledge our Privacy Statement.'

The home page of the company administration portal contains some aggregated information on financial lockers enrolled. 1) Lockers by user activity, 2) Lockers by credit score. You may drill down on the lockers by selecting criteria (last 90 days, 601-660, etc.) We will be continually adding more information to the home dashboard.



2. Distributing Lockers – Enrolling Your myFinLocker Customers (Consumers)

The invitation section permits you to issue myFinLocker invitations in a variety of ways, as well as filter those invitations.

The screenshot shows the 'Consumer Invitations' section. At the top, there are tabs for 'All invites', 'Batch invites', 'Individual invites', and 'Bulk imports'. Below the tabs, a summary shows 'Pending: 1488 Accepted: 267 Total: 1755'. There are 'Filter' and 'Export Invites' buttons. The main table lists individual invitations with columns for 'Status', 'Email', 'Status', 'Created Date', 'Last Active', 'Invited By', 'Assigned To', and 'Invitation Code'. A red arrow points to the 'Invited By' column header.

Status	Email	Status	Created Date	Last Active	Invited By	Assigned To	Invitation Code
Accepted	louis@ig.com	Accepted	06/11/2019		AdminAdmin Admin		
Accepted	louis@ig.com	Accepted	06/08/2019		AdminAdmin Admin		
Pending	louis@ig.com	Pending	06/08/2019	06/14/2019	AdminAdmin Admin		
Pending	louis@ig.com	Pending	01/09/2019		AdminAdmin Admin		
Pending	louis@ig.com	Pending	01/09/2019		AdminAdmin Admin		
Pending	louis@ig.com	Pending	01/09/2019		AdminAdmin Admin		
Pending	louis@ig.com	Pending	01/09/2019		AdminAdmin Admin		
Accepted	louis@ig.com	Accepted	01/09/2019		AdminAdmin Admin		
Pending	louis@ig.com	Pending	01/09/2019		AdminAdmin Admin		
Accepted	louis@ig.com	Accepted	01/09/2019		AdminAdmin Admin		

The following methods are supported:

1. URL invite – issue a customized URL link that you may tie to a marketing campaign, social media, retention, etc.

- 2. Consumer invitation – invite a consumer by email; assign a loan officer (option)
- 3. Batch invitation – invite 200, 2,000 or 10,000 by email
- 4. Bulk update - This allows you to do a bulk update on all invites

2A. Filter Button

myFinLocker’s issued can be filtered the invites by Status, Assignee Sponsor Code, and email address



Status has 3 options: 1) None, 2) Accepted, and 3) Pending. This allows you to filter by invites accepted or pending.

Assignee is any person who is assigned to a specific invite.

Sponsor Code is the Specific Sponsor the email is associated to.

Email address, you can filter by specific email address.

2B. URL Invitation / Common Enrollment Link

This feature provides the ability for multiple consumers to click a common link that will direct them to a web page where they can enroll and create their personal myFinLocker. Each individual link will be associated to the same Company user (e.g., Lender LO, generic email marketing address, etc.). There is no limit to the number of Company links that can be used.

Consumer Invitations



Click on New URL

Link Invitations



New Invitation Link

Assign invitation to: (optional)

Assignee Name

Assign sponsor: (optional)

Sponsor Code

Campaign Identifier

Link Name*

Max Number of Lockers*

Assign Invitation to: (optional)

This assigns the link to a specific user if needed

Assign Sponsor: (Optional)

This Assigns the sponsor code if needed. Some businesses have arranged for Sponsors to finance lockers. If not, no action is needed here.

Campaign Identifier:

This is a tag for what kind of Campaign this invite is for.

Link Name: (Required)

This is the name of the Link you want to give.

Max Number of Lockers: (Required)

This is the number of lockers that can sign up with this link.

This allows you to track how many people clicked on a link invite and enrolled that was sent out.

The orange switch at the end allows you to deactivate the link and activate the link at will.

Link Name	Campaign	URL Address	Status	Status Date	Created By	Last Active	Clicked	Enrolled	
Link 2	Assignee Only	https://portal.stg.finlocker.com/invite/invitation.html?key=45492ee9-2315-48cb-b0c-563e1e877329	Active	08.12.2019	admin	08.12.2019	1	1	
Link1	No Assignees	https://portal.stg.finlocker.com/invite/invitation.html?key=55d83c81-22d6-4c65-b5d-52613ef939dc	Active	08.12.2019	admin	08.12.2019	3	1	

Items on page 10 0 of 1

2C. Batch File Upload Invitations – Multiple Invitations

Consumer Invitations

Available Sponsors

Sponsor	Code	Allocated	Accepted	Available
Acme Financial	ACME	20	1	19

To send invitations to multiple contacts at once, enter the recipients information into the provided CSV template and upload the completed file below.

DOWNLOAD TEMPLATE

- First name, last name, and email must be completed for each recipient
- You may also fill in the user's sponsor code, which is optional
- File must be in CSV format

UPLOAD FILE

This will allow you to send invites to a large group of people all at once.

You can download a template to fill out information or upload a CSV file to send it out the invites to the emails.

Fields to be filled out are First Name, Last Name, Email Address. Sponsor Code is optional.

Click upload then select CVS file

Once uploaded click Send Invitations

SEND INVITATIONS

2D. Individual Invitations – Single Invitation

Consumer Invitations

URL INVITE BATCH INVITE **CONSUMER INVITE** BULK UPDATE

Available Sponsors

Sponsor	Code	Allocated	Accepted	Available
Acme Financial	ACME	20	1	19

Total Invitations to send now:

First Name: Last Name:

Email Address:

Assign invitation to (optional): Assign sponsor (optional):

Enterprise Name: Sponsor Code:

SEND INVITATIONS

This allows you to send out a Single invite to a consumer. Fill out the fields for First Name, Last Name, Email Address.

Sponsor Code allows for the invite to be associated with a company.

Assign Invitation to: (optional)

This assigns the link to a specific user if needed.

Assign Sponsor: (Optional)

This Assigns the sponsor code if needed. Some businesses have arranged for Sponsors to finance lockers. If not, no action is needed here.

Once Completed then click on Send Invitation.



2E. Bulk Update Management – Reassignment of myFinLocker Company Users

This feature supports group management and reassignment of myFinLocker invitations and active Consumers. You can also use this filtered list to send out invites as well under “Bulk Invites” section.

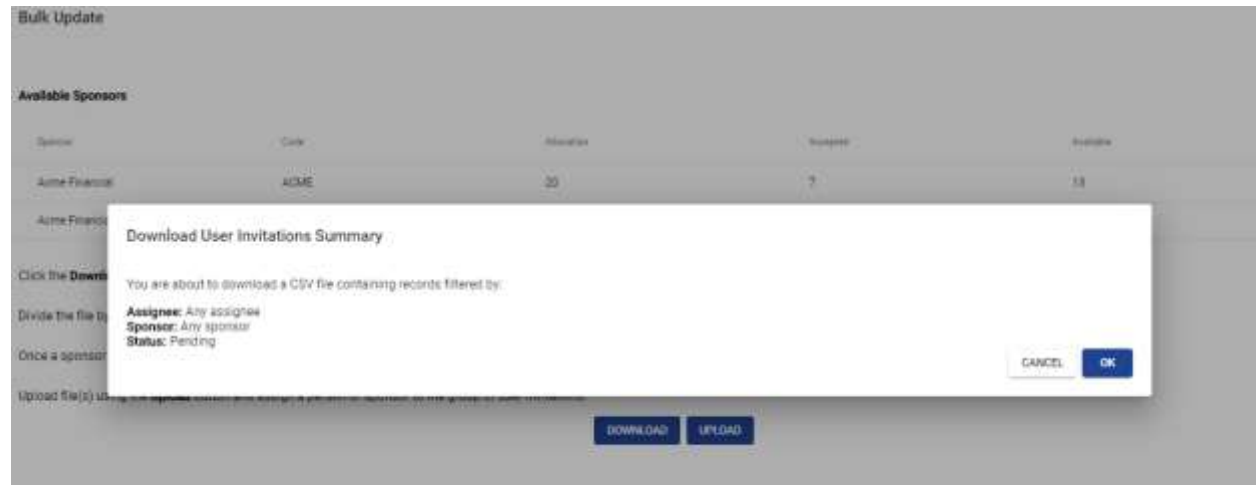


Here is an example of updating invites.

Click Invites, Click Filter, Choose Status as Pending, Click Apply Filter

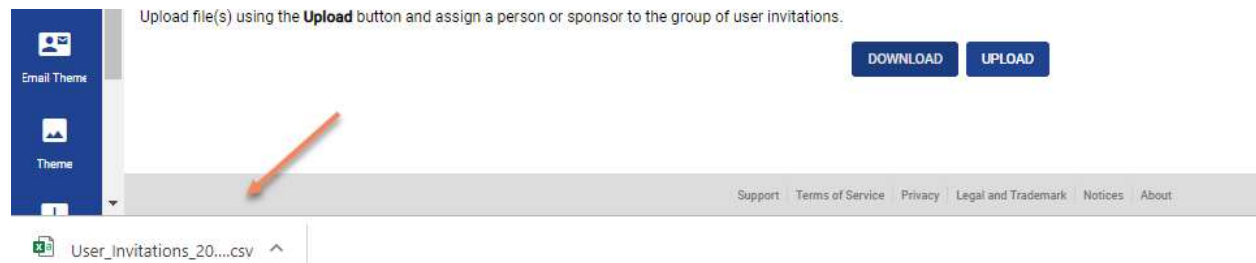
Now you see all pending invites sent and now you can click bulk Update.

Then click download. A window pops up to let you know you’re about to download user invites with filters you selected.



Click ok

You get an Excel CSV folder, open it up.



Click File then save as and place it on your desktop.

Close the Excel file

Make Changes to these invites if you want.

Click upload

Click Desktop then the Excel file you just saved and click open

A window pops up as who is going to be assigned to the email sent out. Select your name or Admin

Click ok and all pending users will be assigned to Admin or you.

3. Business Intelligence Data Management – myFinLocker Aggregate Progress, Readiness

This feature allows you to see the state and major activity progress made within myFinLocker. Note: Data is anonymized in this view.



The duration is defined by 5 colors: Red, Orange, yellow, Green, Blue.

- Red = More than 90 Days ago
- Orange = In the last 2-3 months
- Yellow = in the last month
- Green = in the last 2 weeks
- Blue = in the last week

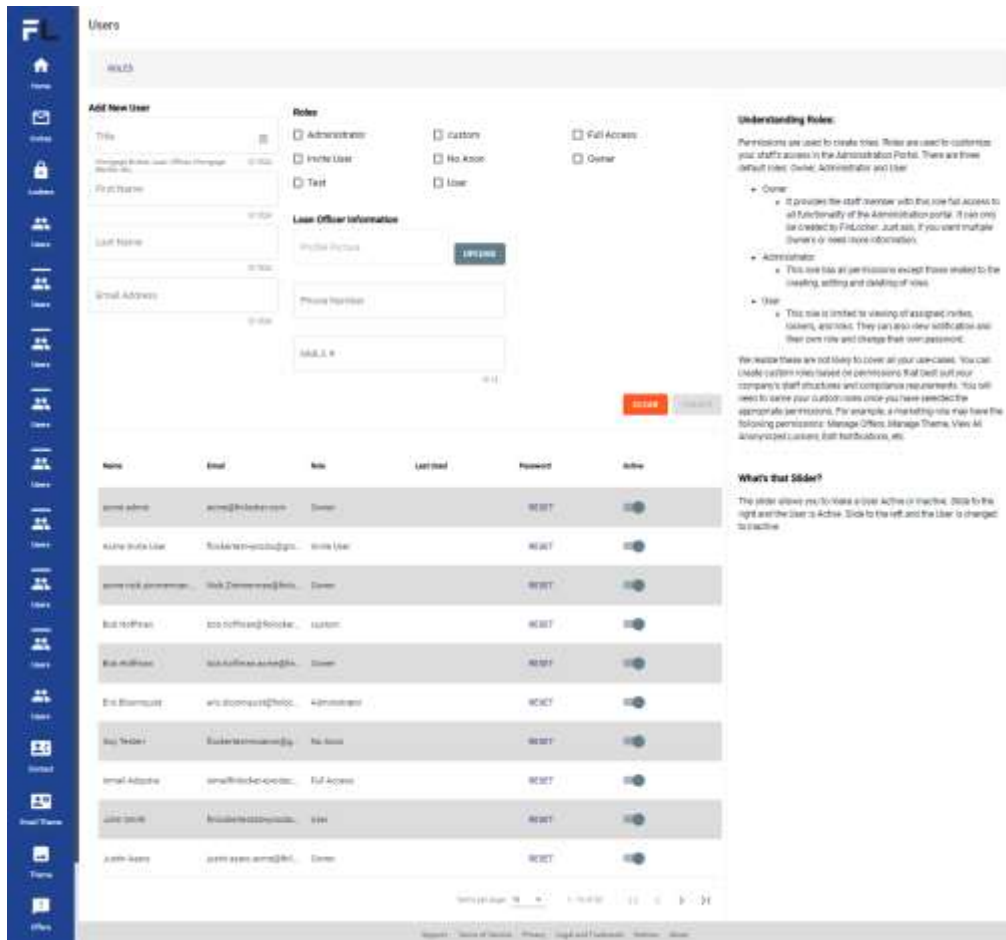
Clicking on a specific locker provides an anonymous snapshot of that financial locker.

Locker 2XP4-V55K-2C4S Details X

Accepted:	5/22/19
Last Active:	8/21/19
State:	
Financial Institutions Enrolled:	2 Financial Institutions Enrolled
Credit Endowment:	Enrolled
AUM:	\$132,000.00
Mortgage Value:	Property Enrolled - Mortgage Value Not Available

4. User Management - Administration

This section will guide you through the management and setup of your company users.



4A. Users - Permissions and Personalization

This allows you to create new users for the Admin Portal. From here, you can assign the user a role as well as input their information (mobile phone, NMLS#, email), including uploading a picture. Clicking on a user that is already created will display their information and allow you to edit the details (assuming

your role allots these permissions)

ROLES

Add New User

Title
User 4/1024

Mortgage Broker, Loan Officer, Mortgage
Past Roles, etc.
FinLocker

Last Name
Test 9/1024

Email Address
Test@test.com 4/1024

13/1024


Roles

Administrator custom Full Access

Invite User No Anon Owner

Test User

Loan Officer Information



Profile Picture
LoanOfficer(2).PNG UPLOAD

Phone Number
(555) 555-5555

NMLS #
999999 6/12

Permissions and User Roles

Permissions allow you to customize your staff’s access the Administration Portal. There are three default roles that can be assigned to any of your staff. These defaults are: Owner, Admin, and User.

Owner

It provides the staff member with this role full access to all functionality of the Administration portal. It can only be created by FinLocker. Just ask if you want multiple Owners or need more information.

Admin

This role has all permission sets, except creating, editing, and deleting roles.

User

This role is limited to viewing of assigned invites, lockers, and links. They can also view notification and their own role and change their own password.

We realize these are not likely to cover all your use-cases. You can create custom roles based on permissions that best suit your company’s staff structures and compliance requirements. You will need to name your custom roles once you have selected the appropriate permissions. For example, a marketing role may have the following permissions: Manage Offers, Manage Theme, View All Anonymized Lockers, Edit Notifications, etc.

Here is where you can make a user Active or Inactive by clicking on the slider.

Select	Company	Division/Branch	Name	Email	Last Used	Active
<input type="checkbox"/>	Acme		John Roberts	jroberts@gmail.com		
<input type="checkbox"/>	Acme		Jane Smith	jsmith@gmail.com		

4B. Reset Password

This allows you reset passwords for a user of your myFinLockers.

Name	Email	Role	Last Used	Password	Active
acme admin	acme@finlocker.com	Owner		RESET	
Acme Invite User	flockertest+prodiu@gm...	Invite User		RESET	

Confirm

Are you sure you want to reset acme nick.zimmerman.acme@finlocker.com's password. A temporary password will be sent to: Nick.Zimmerman@finlocker.com

A onetime passcode will be delivered to the user which will be user to log in and change their password.

4C. Creating Roles

Roles

Add New Role

Name:

Permissions

- Accept Shared Lockers
- Assign Invitation Links
- Assign invites
- Assign role to users
- Change Password
- Create Invitation Links
- Create Invites
- Create role
- Create User
- Delete Notifications
- Delete role
- Download Shared Documents
- Edit Invitation Link
- Edit Notifications
- Edit role
- Edit User
- Manage Company Information
- Manage Email Theme
- Manage Offers
- Manage Theme
- Reset the password of a user
- Toggle Active Status
- View All Admin Users
- View All Anonymized Lockers
- View Assigned Invites
- View Assigned Lockers
- View Invitation Link
- View Notifications
- View Role
- View Shared Lockers

Understanding Permissions:

Permissions allow you to customize your staff's access to the Administration Portal. There are three default roles that can be assigned to any of your staff. These defaults are: Owner, Admin, and User.

- Owner**
 - This role has full access to all functionality. This role is only created by FinLocker. Just as is, if you want multiple Owners.
- Admin**
 - This role has all permission sets, except Create Users and Set Permissions.
- User**
 - This role is limited to View Invites and Send Invite (one user at a time) functionality.

We realize that these are not likely to cover all your users. As you are adding in a new user, select one of the defaults, and then check or uncheck the permissions as appropriate. When you finish, you will be asked to name the new permission set you've just created. You will then be able to re-use that group for other members of your staff.

Roles Table:

Role Name	Count	Created	Last Modified
Administrators	4	25	2019.05.21
Invites	1	10	2019.08.20
Full Access	4	17	2020.01.27
Invite User	2	7	2019.10.09
Owner	1	18	2019.10.10
Team	2	6	2019.09.13
User	2	6	2019.05.21

From here Owners can create customized roles specific to their organizations. Permissions that are not allowed to be given will be greyed out. All roles that are created here will show up in the Roles menu, on the user creation page, to be assigned to newly created users.

5. Contact

This allows a Generic Email address that allows the consumer to contact the Lender.



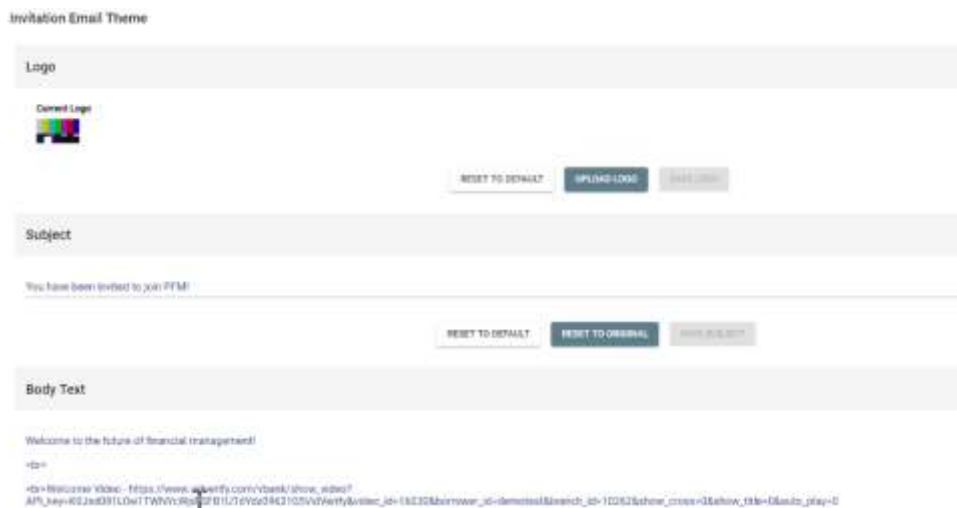
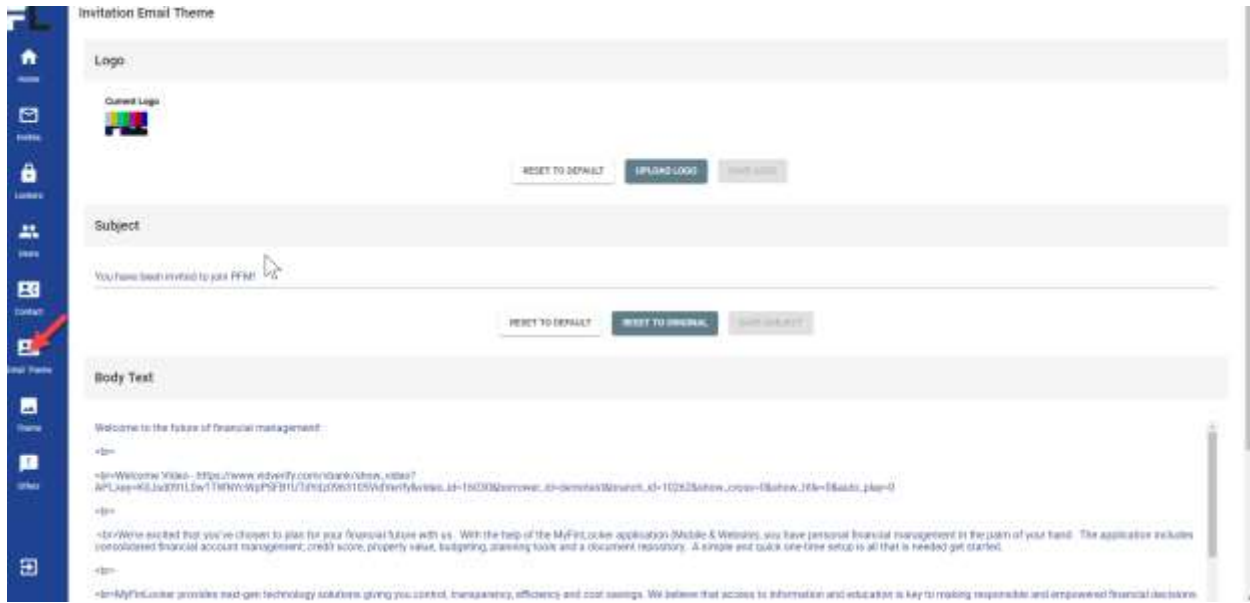
The subjects are what the consumer can contact the lender about for questions or issues. You can add Selectable subject by clicking above the line and choosing the subjects the consumer can choose from.

This Contact Setup is tied to the company code assigned for the Lender admin.

Put Contact Email Address, Click Save and you can Enable or Disable the contact on the switch above the save button.

If you have assigned staff to financial lockers, the individual assigned will receive the email.

6. Email Theme

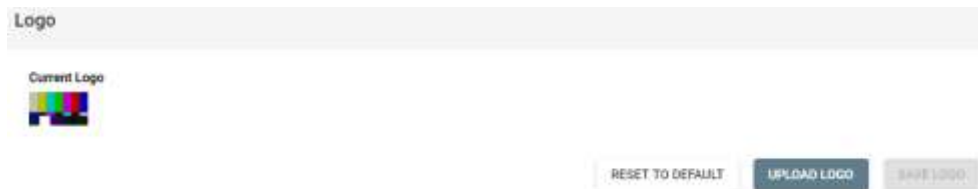


This is to customize the Email invite to be sent out for users to sign up for the Locker PFM tool.

6A. Logo

This Allows you to upload the Logo that is going to be used in the Invitation that is going to be sent out for consumers.

Click Upload Logo then Save Logo. Supported types are: png (preferred), gif, jpeg, img.

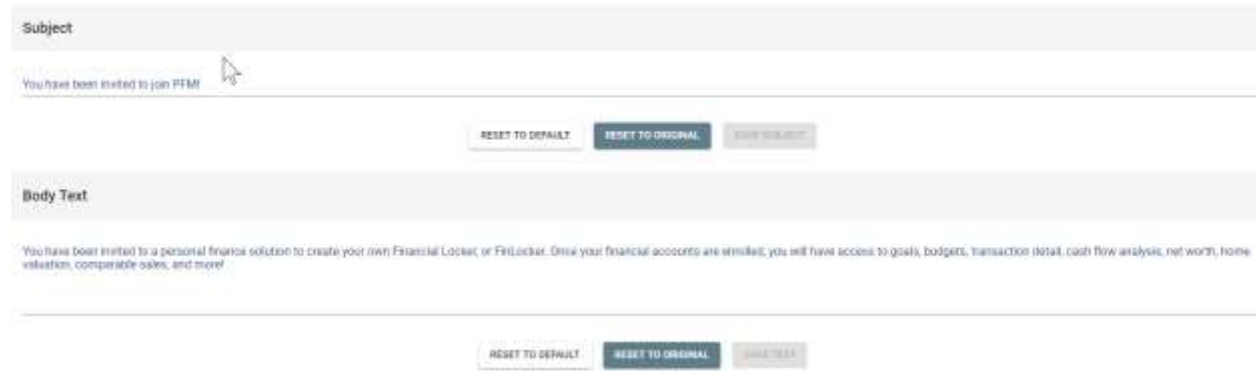


6B. Subject and Body Text

This allows you to adjust the Subject being used in the Email for the invitations and what the Body of the Email is going to say and look like.

Type in the Subject and then Save Subject.

Type in the Body Text and click Save Text.



Note: If you have spaces between paragraphs of the email invite, they will NOT be in the invite. There is a work around for this and will be shown below.

Example below

You have been invited to a personal finance solution to create your own Financial Locker, or FinLocker. Once your financial accounts are enrolled, you will have access to goals, budgets, transaction detail, cash flow analysis, net worth, home valuation, comparable sales, and more!

This is a test paragraph!!!

This is another Test paragraph!!

Preview Email results

You have been invited to a personal finance solution to create your own Financial Locker, or FinLocker. Once your financial accounts are enrolled, you will have access to goals, budgets, transaction detail, cash flow analysis, net worth, home valuation, comparable sales, and more! This is a test paragraph!!! This is another Test paragraph!!

TAP HERE TO GET STARTED

Work Around to have spaces between Paragraphs.

Use: `<p style="page-break-before: always">` between each paragraph. Example Below.

You have been invited to a personal finance solution to create your own Financial Locker, or FinLocker. Once your financial accounts are enrolled, you will have access to goals, budgets, transaction detail, cash flow analysis, net worth, home valuation, comparable sales, and more!

<p style="page-break-before: always">

This is a test paragraph!!!

<p style="page-break-before: always">

This is another Test paragraph!!

Preview Email Results:



6C. Preview Email

This allows you to preview the Email before it is sent out to users. This is very useful to make sure it looks just the way you intended and no need to send yourself many emails to see what it looks like.

Click [PREVIEW EMAIL](#)

To close out of the preview click Close at the bottom right.

From: FinLocker (no-reply@finlocker.com)

Subject: You have been invited to join PFM!

Email:



08/13/2019

{{FirstName}} {{LastName}},

You have been invited to a personal finance solution to create your own Financial Locker, or FinLocker. Once your financial accounts are enrolled, you will have access to goals, budgets, transaction detail, cash flow analysis, net worth, home valuation, comparable sales, and more!

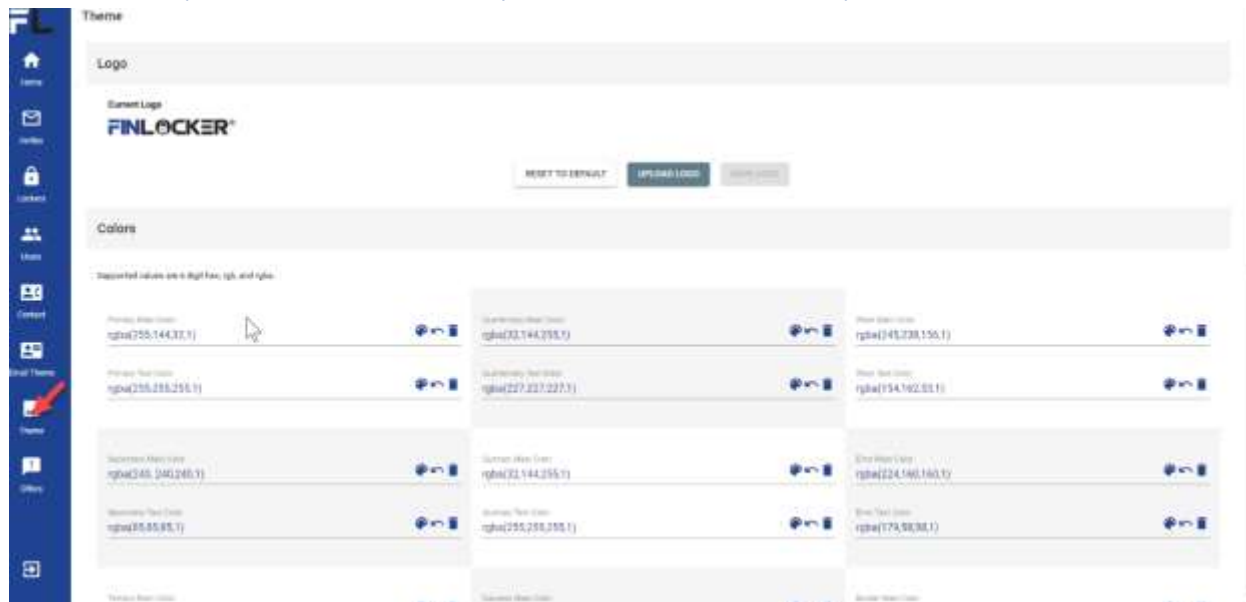
[TAP HERE TO GET STARTED](#)

Sincerely,

Acme Financial

CLOSE

7. Theme (Color Scheme for your financial locker)



Tips for Branding your myFinLocker

Layout Mapping

This feature allows you to customize the view of the locker based on the financial company issuing the lockers.

Below is a guide to customize.

Each section has a 6-digit hex number, that can be customized by implementing a known hex number or by picking from the color wheel.



When a color is selected, a preview is viewable. You will have to push save to confirm your changes.

If interested in learning how to customizing the color: [follow this how to change each area.](#)

Colors

Supported colors are 6 digit hex, rgb, and rgba

Primary Main Color rgba(286,144,33,1)	Secondary Main Color rgba(32,144,255,1)	Third Main Color rgba(215,238,156,1)
Primary Text Color rgba(255,255,255,1)	Secondary Text Color rgba(255,255,255,1)	Third Text Color rgba(154,182,33,1)
Secondary Main Color rgba(246, 246,246,1)	Secondary Main Color rgba(32,144,255,1)	Third Main Color rgba(228,166,166,1)
Secondary Text Color rgba(255,85,85,1)	Secondary Text Color rgba(255,255,255,1)	Third Text Color rgba(170,88,88,1)
Primary Main Color rgba(255,255,255,1)	Secondary Main Color rgba(224,224,224,1)	Third Main Color rgba(210,210,210,1)
Primary Text Color rgba(0,0,0,1)	Secondary Text Color rgba(47,133,41,1)	Third Text Color rgba(210,210,210,1)

Below is what the locker looks like with current settings




8. Offers and Content Widgets

Your Company can provide three Customized rolling offers in your financial lockers based on personalized content by uploading images and creating text content to be shown in a


[CREATE NEW OFFER](#)

Active Offers




Name: 1st time home buyer - Z
Type: Dashboard, Mortgage
Destination: Share Center

[EDIT OFFER](#) [DELETE OFFER](#)



Name: Business Card
Type: Dashboard, Mortgage
Destination: Share Center

[EDIT OFFER](#) [DELETE OFFER](#)



Name: down payment 3
Type: Dashboard, Mortgage
Destination: Share Center

[EDIT OFFER](#) [DELETE OFFER](#)

Inactive Offers

You currently do not have any inactive offers.

An example of an offer can include your Customer sharing their Locker data to initiate a loan application based on clicking an “I’m interested” a call to action. Offers/Promotions can be for: savings accounts, checking accounts, CD’s, auto loans, money market, investments, purchase mortgage, refinance, mortgage rates in general, home equity line of credit, etc.

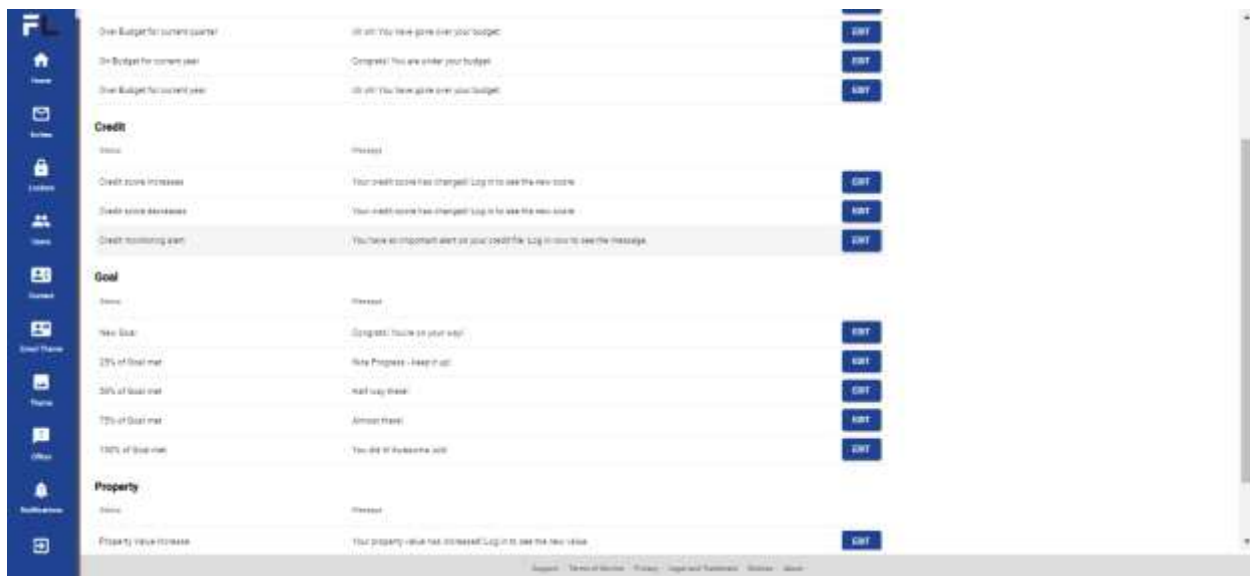
Creating an Offer/Promotion:

1. Click Create Offer in upper right corner, or, Edit Offer
2. Upload new offer image, select image from your photo stock (image should be square in shape and at least 300x300)
3. Name: define the campaign, or program
4. Type: display on the dashboard, mortgage page, or both
5. In the Message field, type a description that displays in the header
6. Button definition: This defines where the consumer is taken when clicking “I’m interested” a) contact lender, b) for integrated clients, directly to the share center

Note: do not worry if it looks like the image does not fit. The view in the financial locker is architected to fit the image.

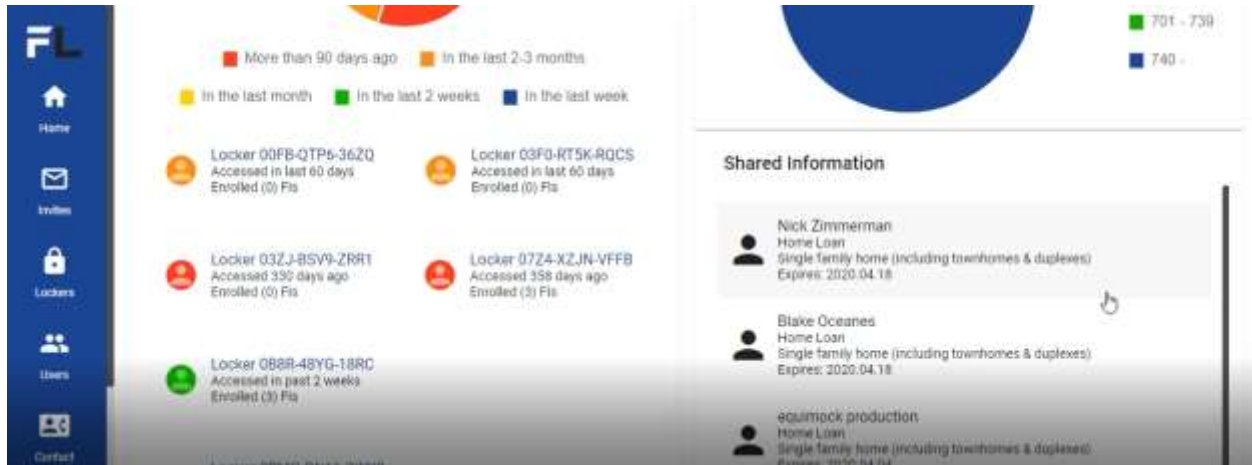
9. Notifications

The notification section allows you to customize messaging to the consumer for Budgets, Goals, Credit, and Property. You can edit the messages to your liking that are sent to consumers with your Locker.

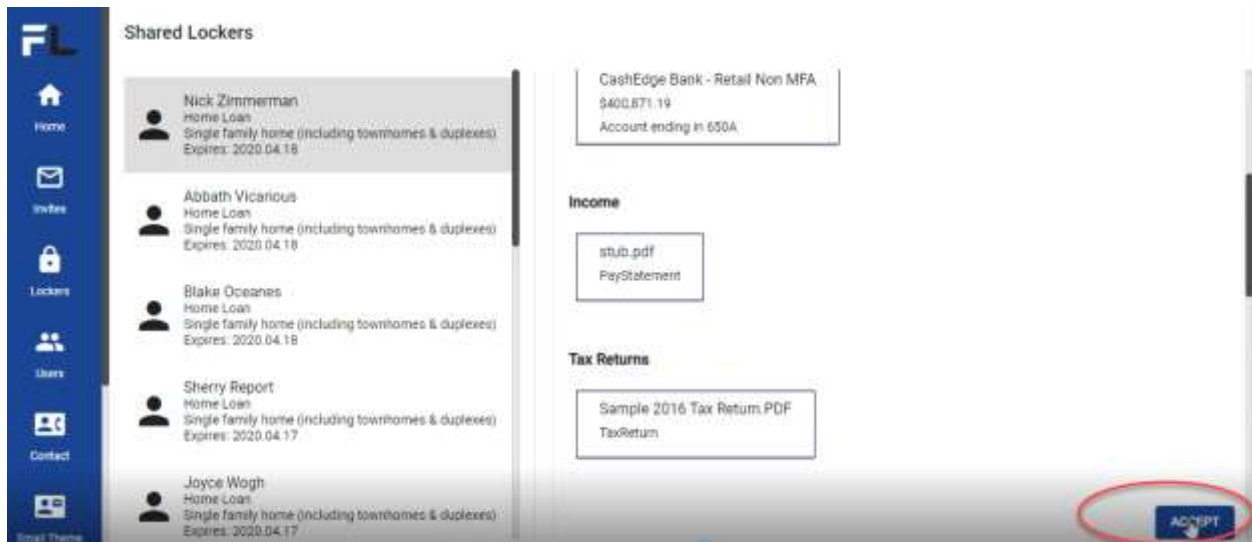


10. Shared Files – Accept, Download, Access

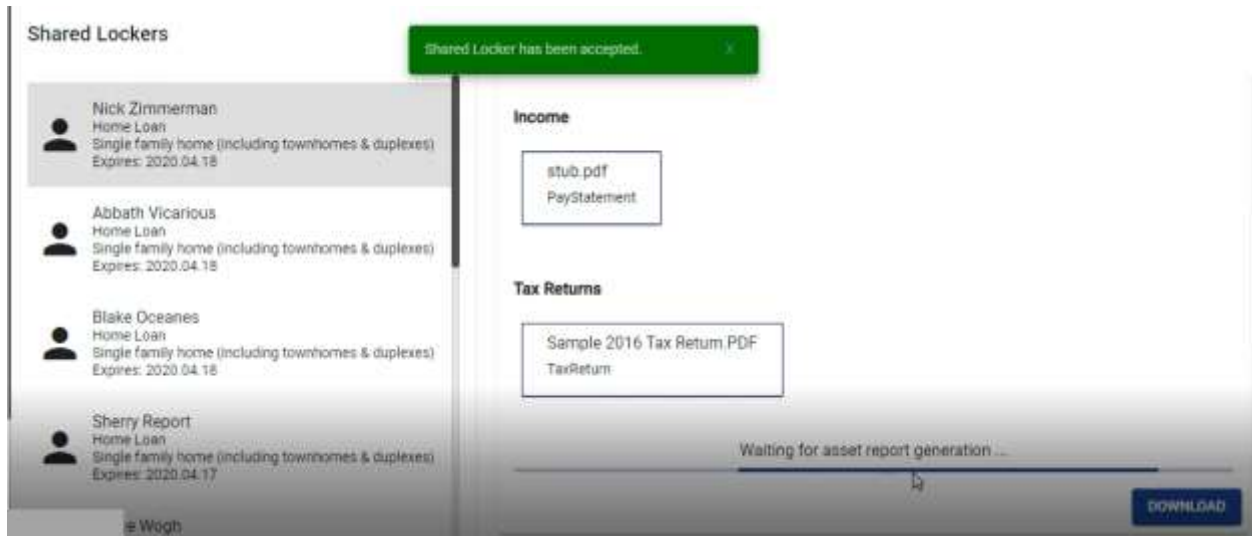
When a consumer shares their enrolled accounts in their locker, tax returns, paystubs, insurance information, letters of explanation, etc., it will be available in your admin portal under the consumers name. This will be in the dashboard under “Shared Information”.



Select the shared information account and scroll down to “Accept”. By accepting the file, it will begin to download the data in a Mismo 2.3.1 file, a Fannie Mae 3.2 file, and also the attached documents.



You will receive a notice that your shared locker has been accepted and download is occurring. This may take between 20 seconds to a minute.



Once complete your file will be available in a zip file. Access the documents from the zip file: Mismo 2.3.1, Fannie Mae 3.2 file, asset report, tax documents, pay statements, and more.

