CADENCE ClientWeb GUIDE

UNITED CAPITAL FUNDING

INTELLIGENT.WORKING.CAPITAL™

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Your Onboarding Checklist

Task	Status
Access the web portal page	☐
Sign up for web portal access	☐
Create additional users (if needed)	☐
Run a report	☐

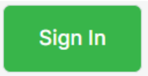


Figure 1

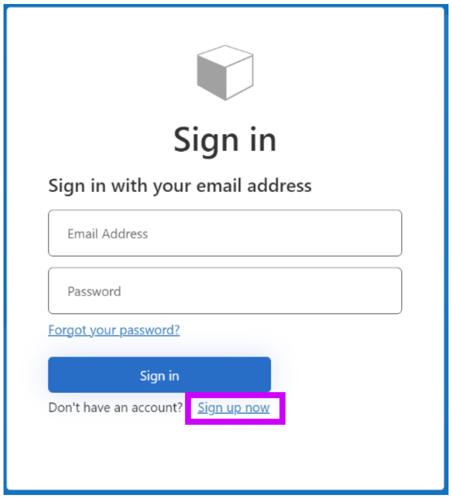


Figure 2

Accessing the new web portal

The access the web portal, you will need:

- a computer or mobile device
- the email address registered with United Capital Funding
- access to the email inbox associated with the email address registered with United Capital Funding
- a web browser

Using your web browser, type in https://unitedcapital.profitstars.com in the web address bar.

1. On the Web Portal landing page, click *Sign In* (**Figure 1**)

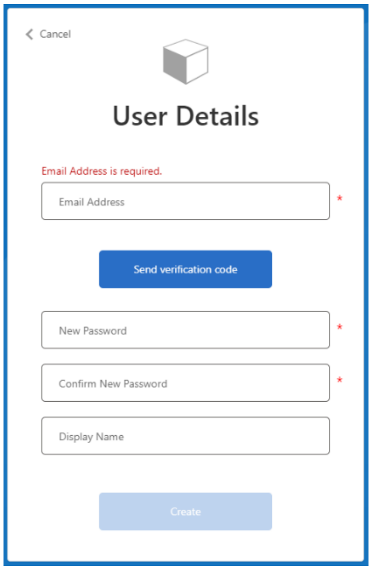


Figure 3

Sign up for United Capital Funding Web Portal Access

One of the great features of the United Capital Funding Web Portal is the user-friendly sign-up process

1. On the Web Portal sign-in screen, click the *Sign Up Now* link (**Figure 2**)
2. Enter your email address. This email address must match the email that United Capital Funding has in our system of record.
3. Click *Send Verification Code*. (**Figure 3**)
4. Open your email to find the verification code and enter that code into the form. (**Figure 4**)

Please note: you will receive the verification code from sonlineservicesteam@microsoftonline.com. If you do not receive an email, please check your junk/spam folder.

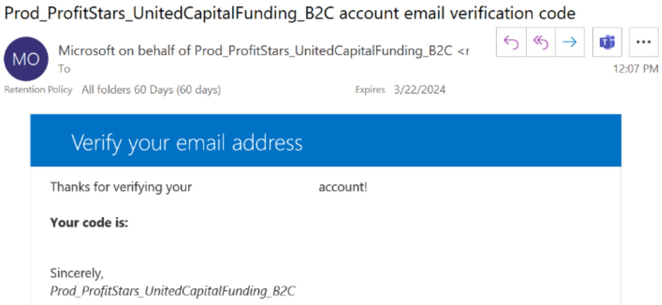


Figure 4

5. Enter the verification code and click Verify Code. (**Figure 5**)
6. When your email is verified, enter your password and re-enter your password to confirm.
    a. Your password must include at least one...
        i. **uppercase letter**
        ii. **special character**
        iii. **lowercase letter**
7. Enter a display name to display at the top of your Web Portal interface
8. Click *Create*
9. Enter your email and password on the sign-in page and then click *Sign In* to begin. (**Figure 6**)
10. Signing in will open your company dashboard.
11. Click *Yes* on the banner at the top of your screen to save a shortcut to your desktop.

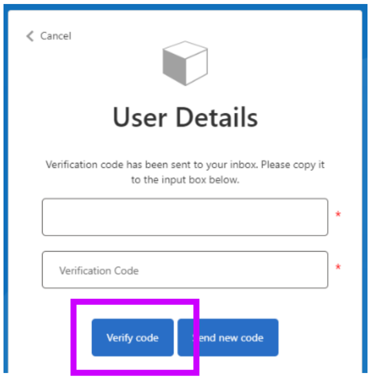


Figure 5

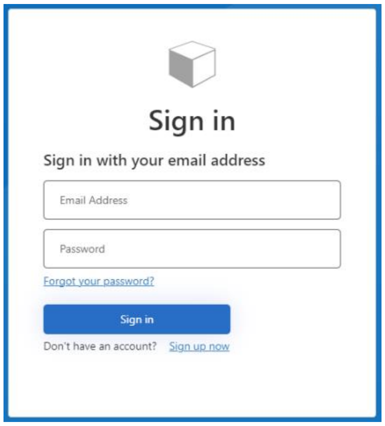


Figure 6

United Capital Funding Web Portal Administrator

United Capital Funding will create an Administrator for each client. This will allow the administrator to create a user login for each authorized staff member.

The administrator will need the new user's first name, last name, and email address. The Web Portal Administrator link allows the administrator to create and manage each authorized staff member's sign-in capabilities.

To add a new user:

1. Click the *Administrator* Link (**Figure 7**)
2. Click *Users* (**Figure 8**)
3. Click the *New User* button at the bottom of the screen (**Figure 8**)
4. Complete the user information fields.
5. Select the appropriate access rights of the user.
6. Enter notes if applicable.
7. Click *Save*
8. Notify your new user(s). The web portal will not notify the new user that they are set up. Be sure to let your new user(s) know how to access the Web Portal with the link (https://unitedcapital.profitstars.com/).

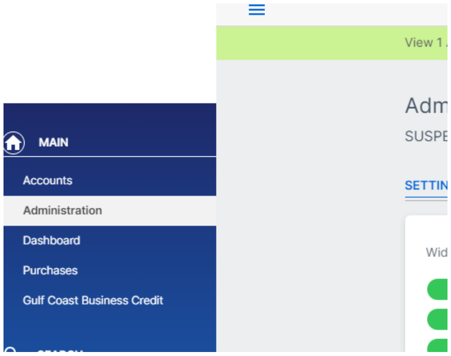


Figure 7

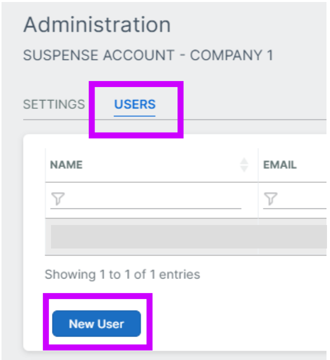


Figure 8

9. **How to troubleshoot new user errors**. If a new user is unable to login and receives the below error.

   a. Double check and confirm that the user's email address is correct, and the user has Portal and Active set to green. (**Figure 9**)

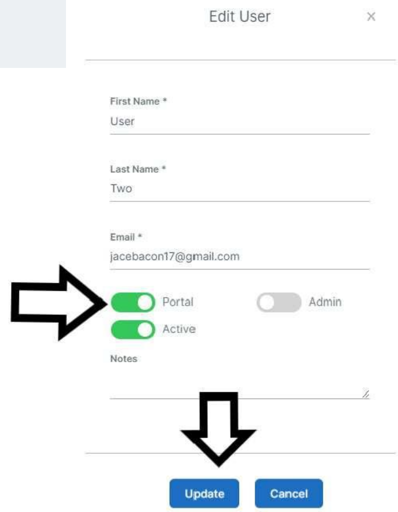


Figure 9

UCF web portal users can be set up with specific access rights to view information and perform certain tasks.

To customize settings for a user:

1. Click the *Administration* link.
2. Click *Users*
3. In the Users list, click a name
4. Toggle the green dashboard widgets on or off for the user. (**Figure 10**)
5. Make each allowed item green for access or grey to restrict access for that user.
6. Click *Save*

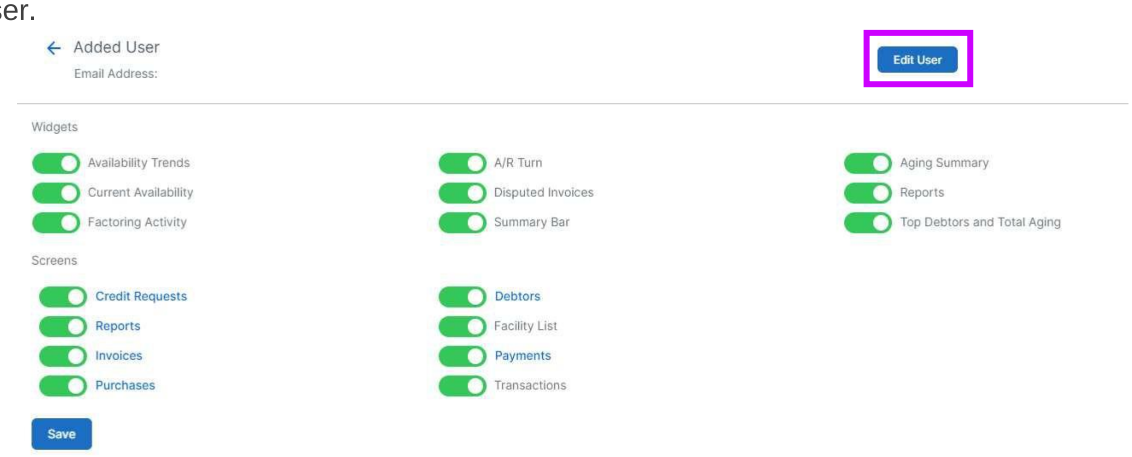


Figure 10

If a user is no longer with your company:

1. Click the *Administration* Link
2. Click *Users*
3. In the Users list, click a name
4. Click *edit user* (**Figure 10**)

5. Once you are on the edit user page, toggle the portal widget from green to grey (**Figure 9**)
6. Click *Update*

You can also make a user inactive, but **you cannot delete a user from your user list**.

How to run reports

1. Select the *Reports* tab
2. Click on *Request* in the upper right side of the screen (**Figure 11**)
3. Request Report box pop ups (**Figure 12**)
4. Pick report name
5. Then Date Range (**Figure 13**)
6. Then click on *Request*.
7. Box will pop up on screen with report request submitted.
8. Report will show up in the below list as pending. Then it will show up as available. (**Figure 14**)

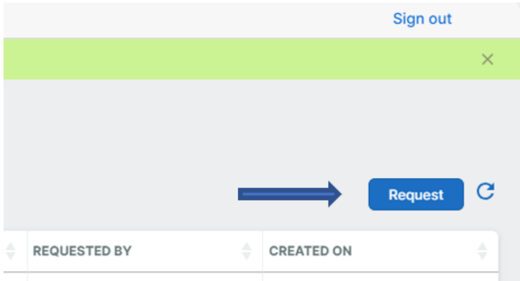


Figure 11

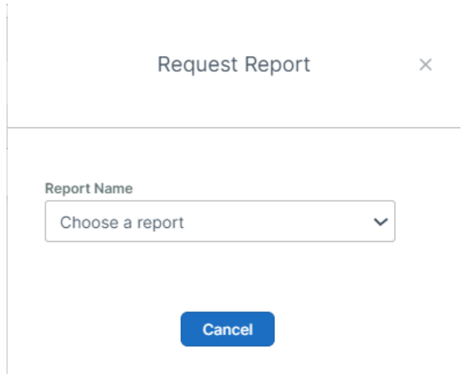


Figure 12

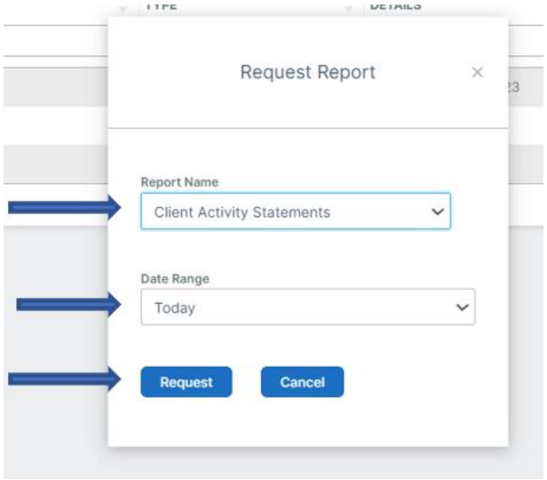


Figure 13

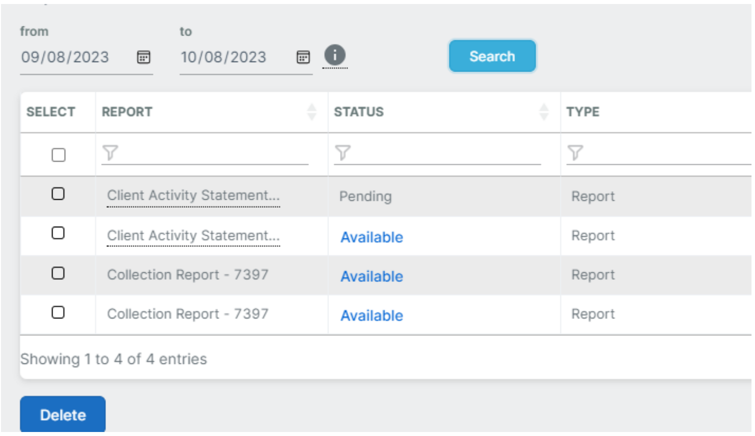


Figure 14

How to view transactions

Figure 15

1. Open the *Transactions* Screen
2. Pick date range. (**Figure 15**)
3. Then click on *search*
4. If you click on batch number, the specific report will run and be available in the report screen
5. Click on *Continue*
6. Message pops up. (**Figure 16**)
7. Report is now available in the report screen. (**Figure 17**)

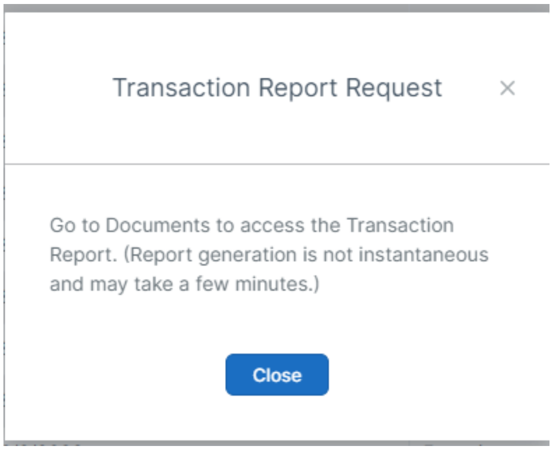
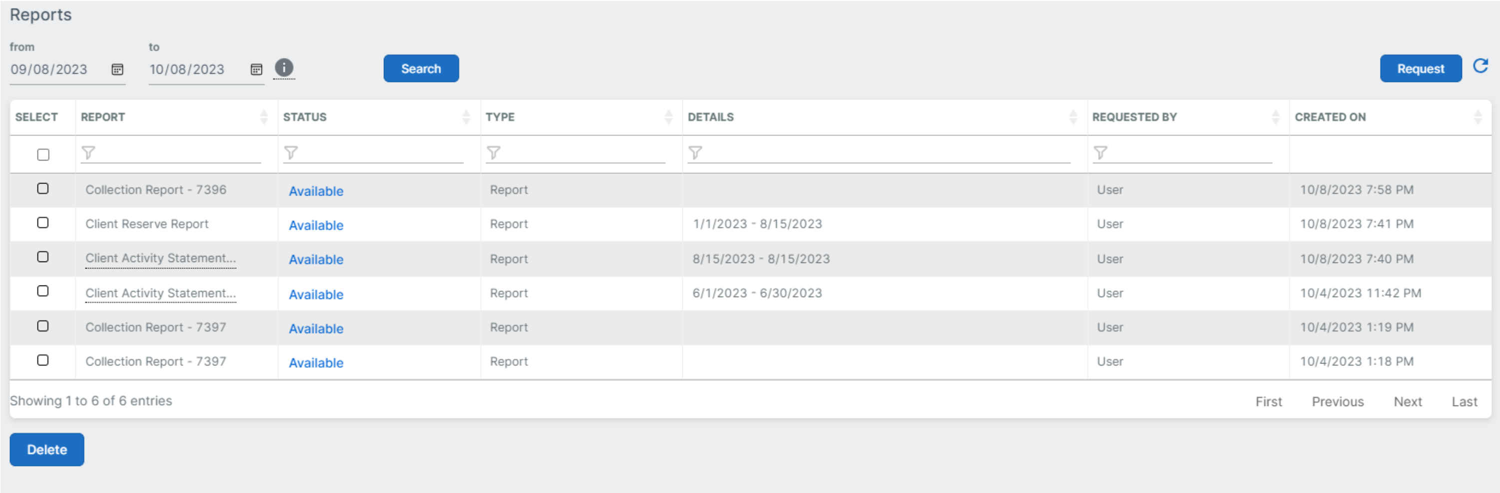


Figure 16



SELECT	REPORT	STATUS	TYPE	DETAILS	REQUESTED BY	CREATED ON
☐	Collection Report - 7396	Available	Report		User	10/8/2023 7:58 PM
☐	Client Reserve Report	Available	Report	1/1/2023 - 8/15/2023	User	10/8/2023 7:41 PM
☐	Client Activity Statement...	Available	Report	8/15/2023 - 8/15/2023	User	10/8/2023 7:40 PM
☐	Client Activity Statement...	Available	Report	6/1/2023 - 6/30/2023	User	10/4/2023 11:42 PM
☐	Collection Report - 7397	Available	Report		User	10/4/2023 1:19 PM
☐	Collection Report - 7397	Available	Report		User	10/4/2023 1:18 PM

Figure 17