

CADENCE ClientWeb GUIDE

UNITED CAPITAL FUNDING



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Your Onboarding Checklist

Task	Status
Access the web portal page	<input type="checkbox"/>
Sign up for web portal access	<input type="checkbox"/>
Create additional users (if needed)	<input type="checkbox"/>
Run a report	<input type="checkbox"/>

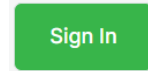


Figure 1

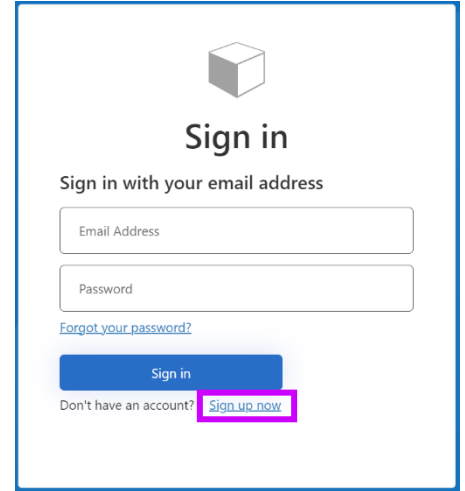


Figure 2

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)

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.

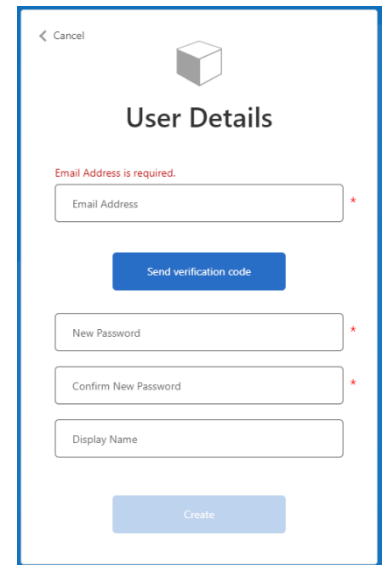


Figure 3

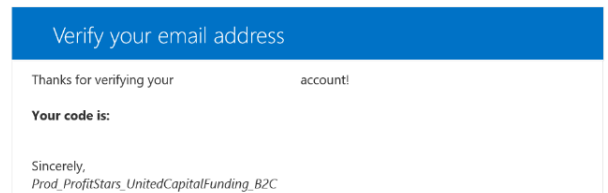
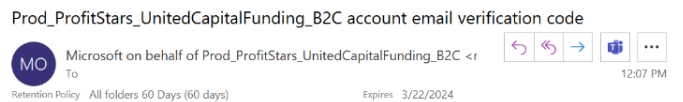


Figure 4



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.

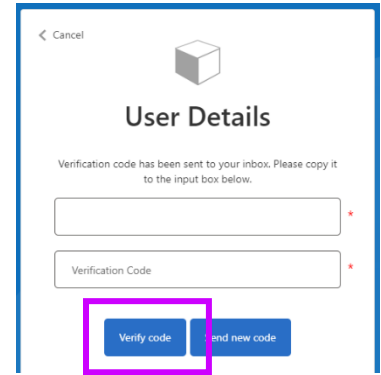


Figure 5

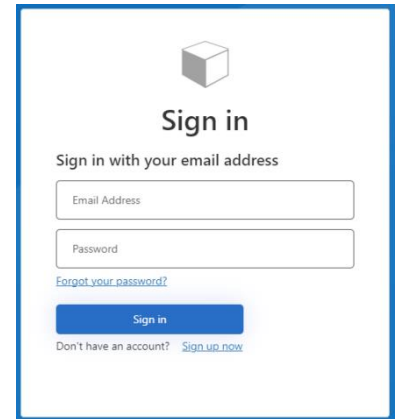


Figure 6

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/>).

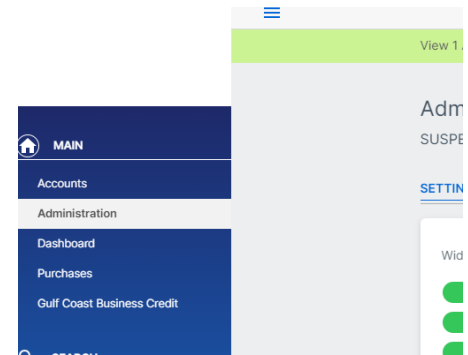


Figure 7

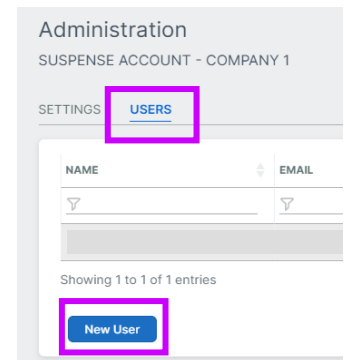


Figure 8



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)

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*

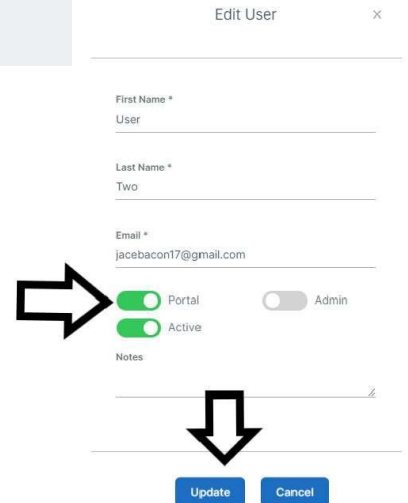


Figure 9

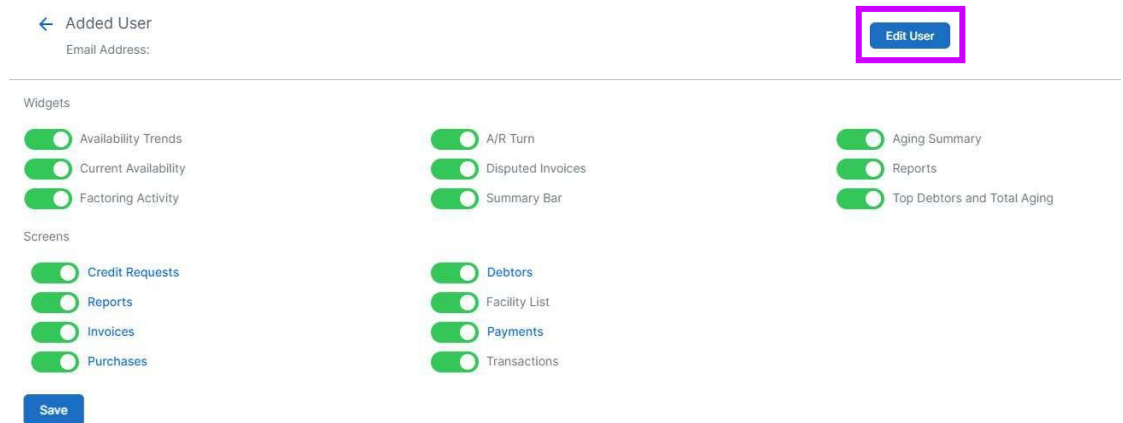


Figure 10

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

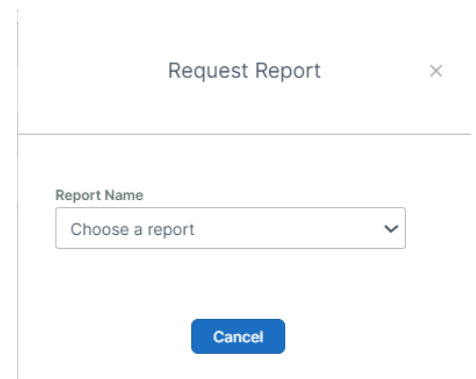


Figure 12

SELECT	REPORT	STATUS	TYPE
<input type="checkbox"/>			
<input type="checkbox"/>	Client Activity Statement...	Pending	Report
<input type="checkbox"/>	Client Activity Statement...	Available	Report
<input type="checkbox"/>	Collection Report - 7397	Available	Report
<input type="checkbox"/>	Collection Report - 7397	Available	Report

Showing 1 to 4 of 4 entries

Delete

Figure 14

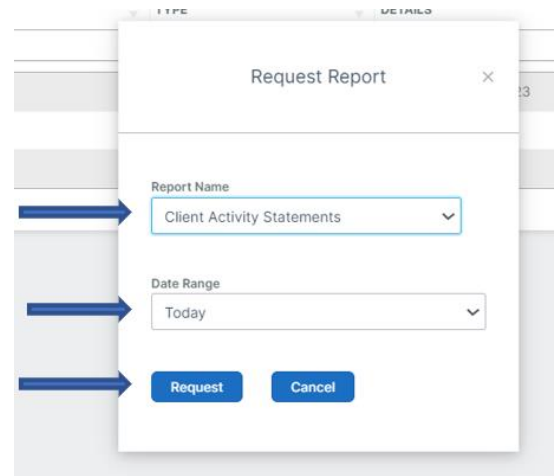


Figure 13



How to view transactions

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 15

The screenshot shows the 'Transactions' header. Below it, there is a date range filter with 'from' and 'to' labels. The 'from' date is 01/01/2023 and the 'to' date is 10/08/2023. There are calendar icons for each date. To the right of the dates is an information icon (i) and a blue 'Search' button. Two blue arrows point to the left, one above the 'Search' button and one above the information icon.

The screenshot shows a dialog box titled 'Transaction Report Request' with a close icon (x) in the top right corner. The main text inside the dialog reads: 'Go to Documents to access the Transaction Report. (Report generation is not instantaneous and may take a few minutes.)'. At the bottom center of the dialog is a blue 'Close' button.

Figure 16

The screenshot shows the 'Reports' screen. At the top, there is a date range filter from 09/08/2023 to 10/08/2023 and a blue 'Search' button. On the right side, there is a blue 'Request' button with a refresh icon. Below the filter is a table with the following columns: SELECT, REPORT, STATUS, TYPE, DETAILS, REQUESTED BY, and CREATED ON. The table contains six rows of report data. At the bottom of the table, it says 'Showing 1 to 6 of 6 entries' and has navigation links for 'First', 'Previous', 'Next', and 'Last'. A blue 'Delete' button is located at the bottom left of the table area.

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

Figure 17

