



Financial Intelligence On Demand

MANAGING SHARABLE LINKS

A GUIDE FOR FINANCIAL PROVIDERS

INTRODUCTION

Finagraph provides the ability to share a read-only view of your Finagraph. With a few quick steps you can create a link that you can share with clients, partners, and advisors. Email the link to contacts or publish it in an IFame on your website for an alternate view. This feature requires a user to be a financial provider and have Admin level permissions to the business.

1. CREATING A SHARABLE LINK

1. Sign into your Finagraph account at <https://app.finagraph.com>
2. Open a business from within your dashboard.

Bison Bank's Businesses

Name

[Crash and the Boys](#)

[Joe's Candy Shop](#) 

[Mal's Shipping](#)

3. Create a New Finagraph for the business using either the button in the center of the page or the one in the Options area.

[Joe's Candy Shop](#)

Get your First Finagraph now. Click the "New Finagraph" button.

Notes:


- Be sure your accounting system is accessible from this computer.
- If using QuickBooks desktop, be sure the correct company file is open.
- If you do not have access to the accounting system, you can add a user that does. Click the Users button on the right.



NEW FINAGRAPH

Options

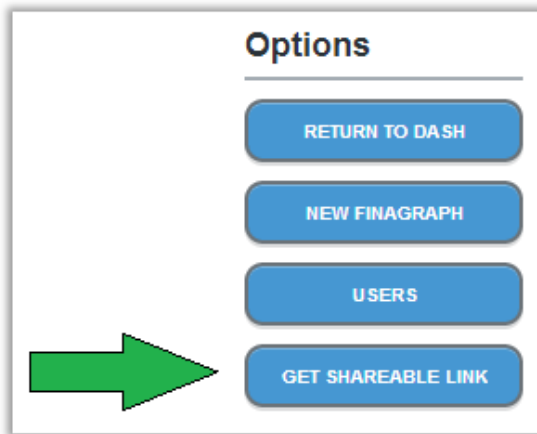
RETURN TO DASH

NEW FINAGRAPH 

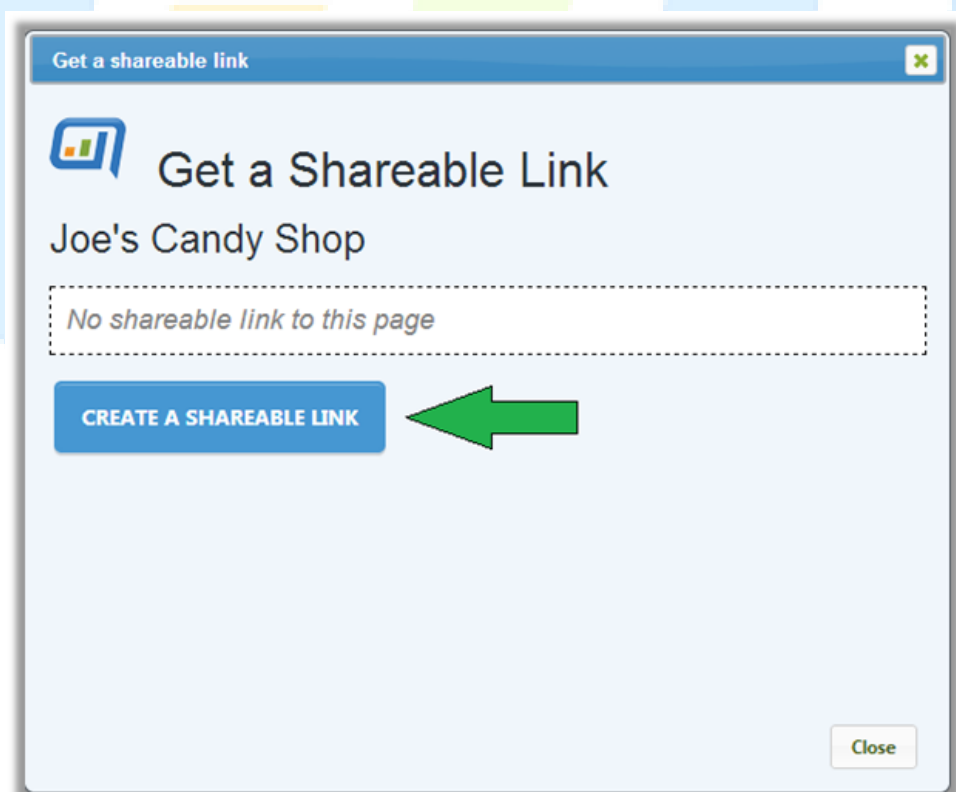
USERS

GET SHAREABLE LINK

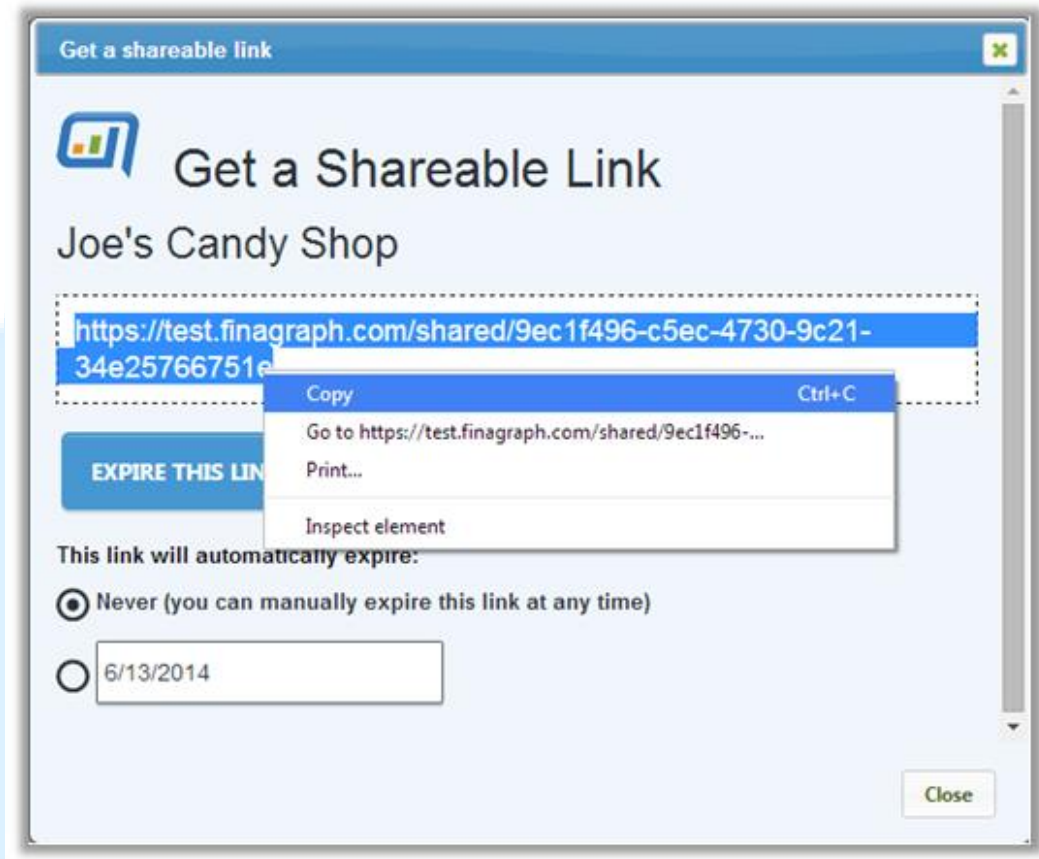
- When the Finagraph is complete, click the "Get Sharable Link" button in the options list. Note: the button is only visible to users with Admin level permissions.



- If no sharable link to this page is currently active, click the "Create A Sharable Link" button.



6. Use the mouse cursor to highlight the link within the text box and copy copy it to the clipboard.

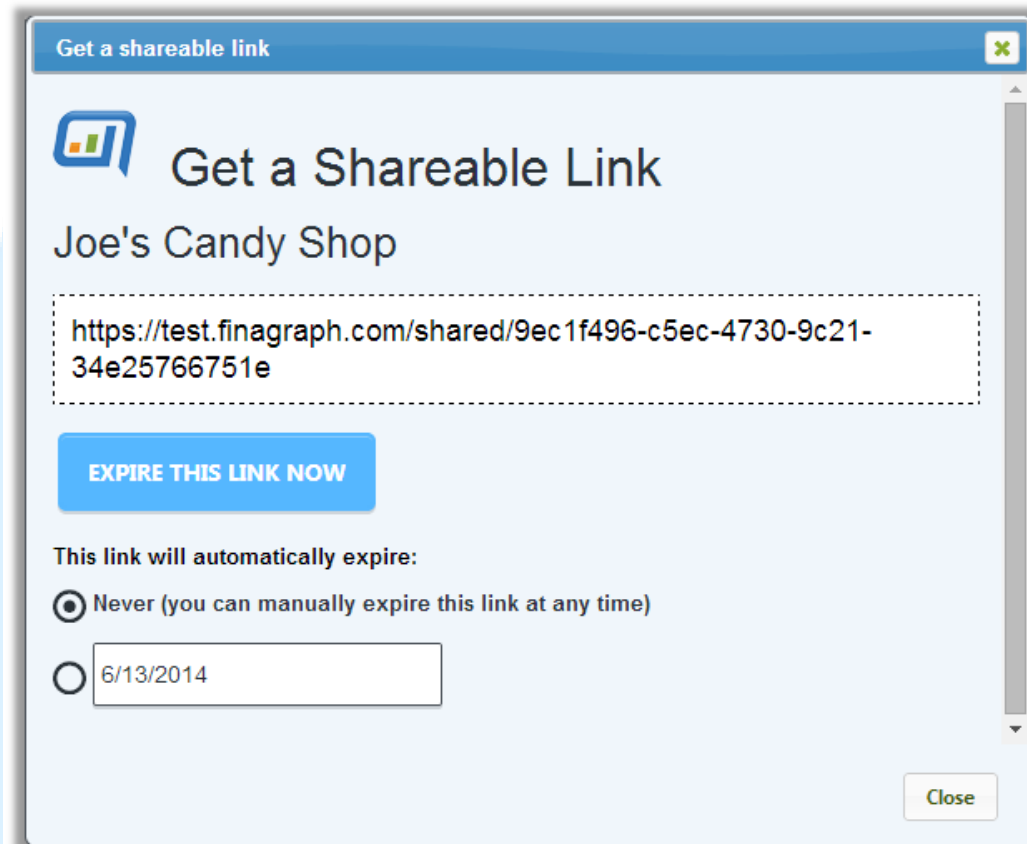


7. This link can then be shared via an email or used in an IFrame to present a public display of this particular Finagraph.

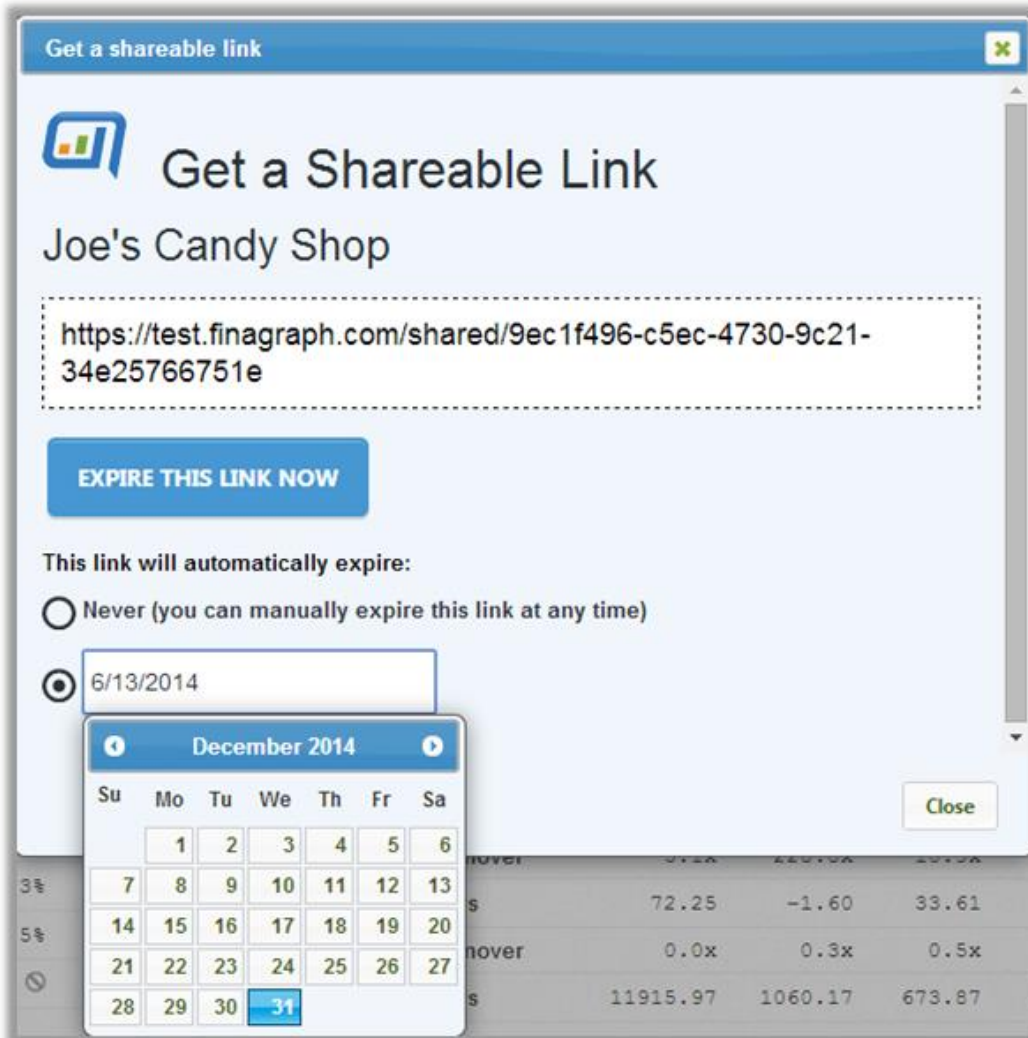
<http://test.finagraph.com/shared/9ec1f496-c5ec-4730-9c21-34e25766751e>

2. EXPIRING A SHARED LINK


1. When you no longer want to share the Finagraph you can use the “Expire This Link Now” button. People who use the link after expiration will see an error that the resource is unavailable.



- An optional feature is available to set a predetermined expiration date when the sharable link is first created. If a date is ever selected that is prior to the current date, the link will be expired.



Get a shareable link

 Get a Shareable Link

Joe's Candy Shop

`https://test.finagraph.com/shared/9ec1f496-c5ec-4730-9c21-34e25766751e`

EXPIRE THIS LINK NOW

This link will automatically expire:

☐ Never (you can manually expire this link at any time)

☒ 6/13/2014

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Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Close

WANT MORE INFORMATION?

For more information about Finagraph visit us at www.finagraph.com or email support@finagraph.com.