



# How to Manage Account and License in FinPricing?



FinPricing



FinPricing is a FinTech company that provides a comprehensive front, middle and back office solution for capital market trading and risk management, asset and wealth management, and investment portfolio management. The software technology has been designed to meet the demands of market participants of all levels.

The platform is very easy to install and simple to use. By taking away constraints - whether it is through user-friendly interfaces, broad asset class coverage, advanced analytics, improved access to data, flexible reporting, and extensible workflow or by offloading transactional or IT burdens - we give you the freedom to define how you do business next.



## Summary

- How to change your password?
- How to update your account?
- Where to get license information?
- How to purchase a license?





## How to change your password?

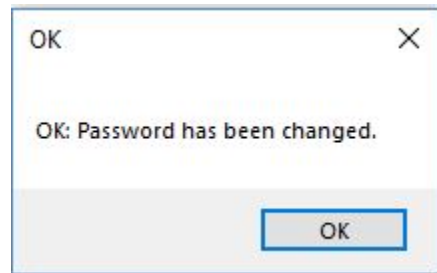
- Click the Account tab at the top-left corner of the application. Then, expand Account -> AccountDetails -> Change Password. A change-password form is displayed in the main window. Input the Old Password and the New Password (including a re-enter) and then click the Save button.

The screenshot displays the 'FinPricing Enterprise' application window. The top menu bar includes 'Trade', 'Data', 'BackOffice', 'BatchRisk', 'Account', and 'Tools'. The 'Account' tab is selected and circled in red. On the left, a tree view shows 'Account' expanded, with 'AccountDetails' and 'License' visible. Under 'AccountDetails', 'Change Password' is highlighted with a red circle. The main window area on the right contains a 'Save' button circled in red, and three input fields labeled 'Old Password:', 'New Password:', and 'Re-Enter New Password:'. The input fields are grouped together and circled in red.



## How to change your password? (Cont'd)

- If you input everything correctly, a password changing ok message box pops up. That means you have successfully change the password.





# How to update your account?

- Click the Account tab at the top-left corner of the application. Then, expand Account -> AccountDetails -> Update Account. Your account information is displayed in the main window. Make any necessary changes and click the Save button.

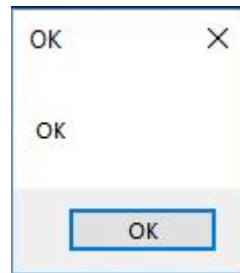
The screenshot shows the 'FinPricing Enterprise' application window. The 'Account' tab is selected and circled in red. In the left sidebar, the 'Account' tree is expanded, and 'Update Account' is circled in red. The main window displays a form with the following fields: 'UserName' (John Smith), 'Email' (cfr77@yahoo.com), 'Address' (828 Broadway Avenue), and 'Country' (USA). The 'Save' button is also circled in red.

UserName	John Smith
Email	cfr77@yahoo.com
Address	828 Broadway Avenue
Country	USA



## How to update your account? (Cont'd)

- An OK message box pops up. That means you have successfully update your account information.







# Where to get license information?

- Click the Account tab at the top-left corner of the application. Then, expand Account -> License -> License Details. The detailed license information is displayed in the main window, including license fee and license period. The information is read-only.

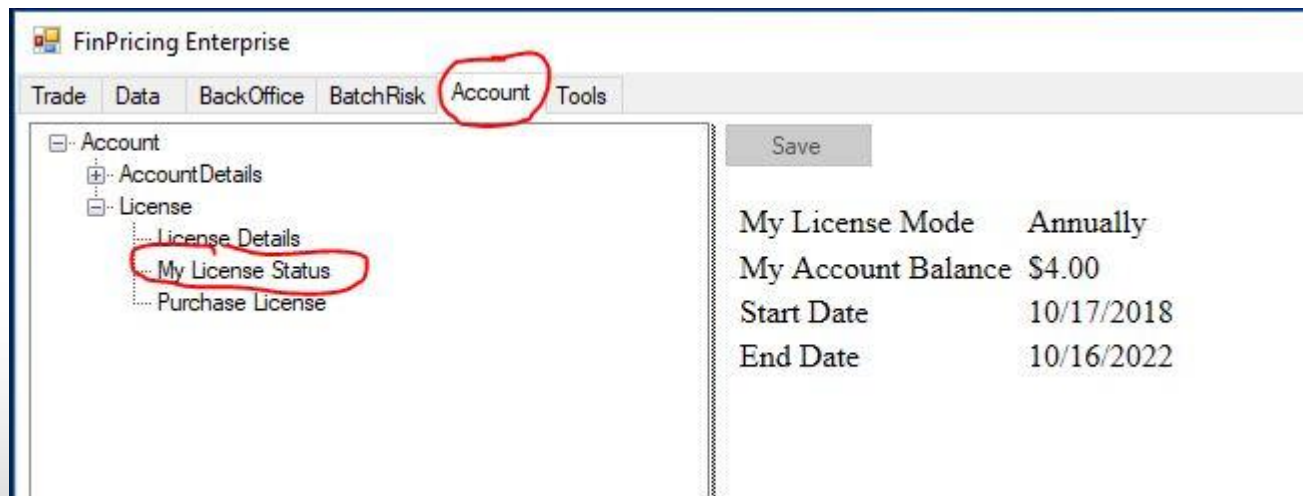
License Mode	License Fee	License Period
Free	\$0.00	60 days
Annually	\$6,999.00	365 days





### Where to get license information? (Cont'd)

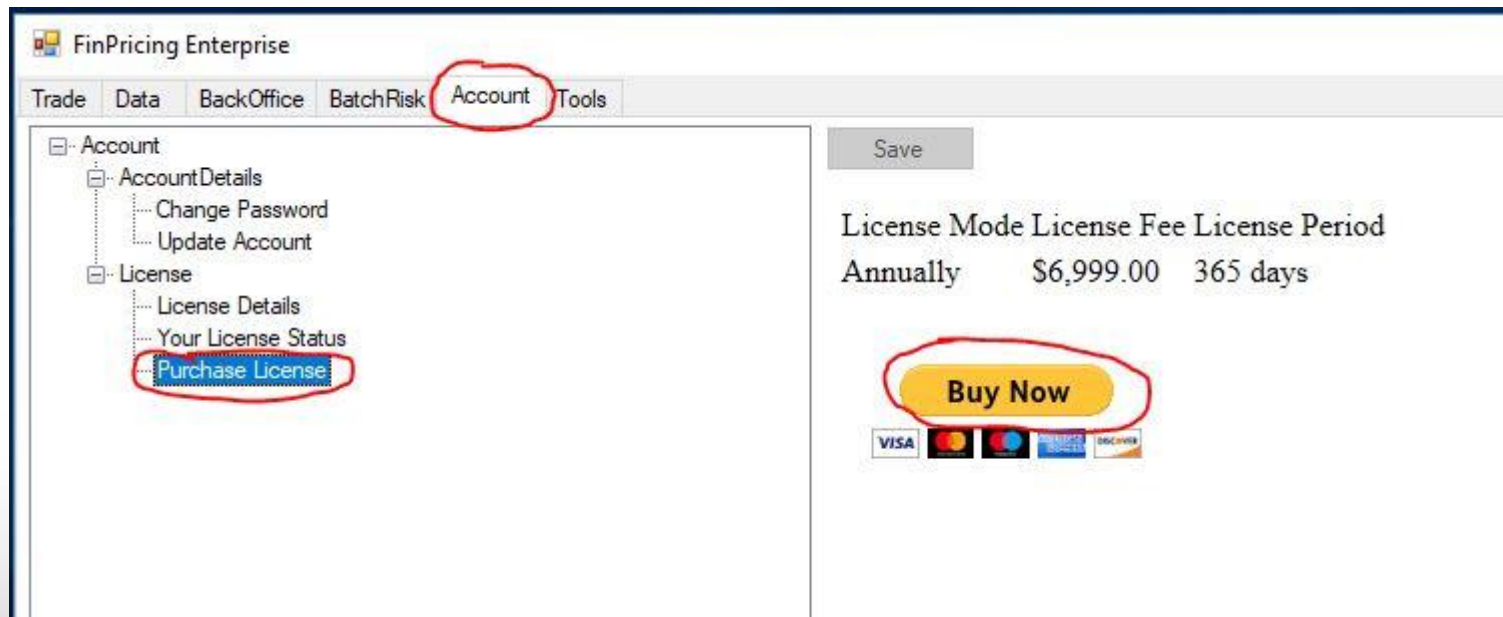
- Click the Account tab at the top-left corner of the application. Then, expand Account -> License -> My License Status. Your license status information is displayed in the main window. The information is read-only.





# How to purchase a license?

- Click the Account tab at the top-left corner of the application. Then, expand Account -> License -> Purchase License. A license purchasing page is shown in the main window. Click the BuyNow button.





### How to purchase a license? (Cont'd)

- A PayPal login page is loaded in the main window. From now on, it is between you and PayPal. After logging in PayPal, follow the on-screen instructions to make payment. Your account and license status will be updated instantaneously. Then you can access all the FinPricing features for the license period.

The screenshot displays the 'FinPricing Enterprise' application window. The 'Account' menu item is circled in red. Within the 'Account' submenu, the 'Purchase License' option is also circled in red. The main content area shows the PayPal login page with the text 'Pay with PayPal' and a shopping cart icon indicating a total of '\$6,999.00 USD'. The login form includes a 'your email used for PayPal' field and a 'Password' field, both of which are circled in red. Below these fields is a checkbox for 'Stay logged in for faster checkout' with a help icon. A blue 'Log In' button is present. Below the button, there is a link for 'Having trouble logging in?' and an 'or' separator. At the bottom, there is a button for 'Pay with a credit or Visa Debit card'. The footer shows 'English | Français'.



# Thank You

You can find more details at  
<https://finpricing.com/lib/CdCreditSpreadCurve.html>