



FINANSCAPES

Business Forecasts made Simple, Easy and Painless

Quick-Start Guide

Administrators and Mentors

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Background

The Finanscapes software makes business forecasts simple, easy and painless. It allows entrepreneurs to quickly get to grips with the important numbers behind their business, without the complexities and risks of spreadsheets or calculations.

Finanscapes is robust and intuitive, accessed online using nothing more than a web browser. It reduces the barriers to creating a solid financial forecast, meaning better informed decision-making and less mentor overhead.

Benefits

- ***Attract more clients and stand apart from other support providers.*** Provide an integrated tool for business that addresses a psychological barrier: simplifying the financials and providing better insight into the business fundamentals.
- ***Free-up mentor time for higher value support.*** No more time wasted fixing formulae and calculations – teach business not Excel.
- ***Create stronger, more viable businesses*** by increasing the level of engagement and ownership of the financials.
- ***Use an interactive and visual demonstration tool,*** graphically showing the significant impacts of decisions taken when running the business and highlight the value of your expertise.
- ***Increased application rate from viable businesses*** as entrepreneurs can use the free full-functionality trial to validate their business without feeling self-conscious or exposed to critique.
- ***Access to clients' plans online – even allowing mentors to update the plan live*** while the client is also logged-in. No more files emailed or corrupted between versions.
- ***Remove the need for users to have access to Excel.*** No software to install and maintain, no corrupted files opened in other spreadsheet packages. Finanscapes is delivered entirely online through a modern web browser.

Getting Started

There is nothing to install, your clients and you can start using Finanscapes straight away. The application is accessed through a Chrome, Firefox or Internet Explorer (version 10 or above) internet browser. All data is saved securely online and accessible from anywhere once logged-in.

Registering & Logging-in

To increase user security Finanscapes does not allow user-name and password login. Instead it integrates with several social media or [OAuth Providers](#) such as LinkedIn and Gmail to allow us to securely identify you.

Choose your preferred mechanism on the [login page](#) and you will be taken to the relevant provider's website where they will ask your permission to give Finanscapes a unique security token and your email address. As you will see, this is the only private information we can access.

On subsequent visits to Finanscapes you will only need to press the relevant provider button and we'll be able to securely identify you.

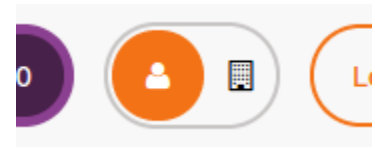
Accepting an Invite Code

When invited to use Finanscapes you will receive an email containing a link and an invite code. You will only need to enter this code once.

The link in the email will take you straight to [the invitation code page](#) after you've registered. Enter the code and confirm your email address on this page and you'll be all set.

Accessing an Organisation as an Administrator or Mentor

If you accept an administrator invite code you will see a new “switch” towards the top right of the page whenever you're logged-in. Click the building icon to change from personal mode (in which you create and publish your own plans – for demonstration purposes) to the administration and mentor pages.



You can be an administrator or mentor for multiple organisations – you'll see them all displayed on cards which summarise which functions you have access to for that organisation.

You can see from the card here that this user is mentoring 13 clients, that there are a total of 3 mentors and 2 administrators.

Click-through the relevant row to see the console.

Organisations

A screenshot of a web application interface. At the top, the word "Organisations" is displayed in a bold, dark green font. Below this is a card for an organization named "Business Experts". The card has a green header with a white building icon. Below the header, there are three rows of data: "MENTORING" with a value of 13, "MENTORS" with a value of 3, and "ADMINISTRATORS" with a value of 2. Each row has a red circular button with a white right-pointing arrow next to the number. At the bottom of the card, there is a grey bar with a gear icon and the text "Options (21 Tokens)". To the right of the card, a vertical sidebar is partially visible, showing a list of items with letters M, M, and A.

Administering Your Organisation

(see “Accessing an Organisation as an Administrator or Mentor” for details on how to access the administrator pages).

If you’re an administrator you will see the “Mentors” link on the organisation card. If you click-through it you’ll see there are two tabs – the current Mentors and the Mentor Invitations. You can see below that by default we take you to the list of current mentors.

NAME	EMAIL	LICENSES REMAINING	LOGIN METHOD	LAST LOGIN	ACCESS EXPIRES
Paul Smith	paul@smith.co.uk	5	Google	10 January 2014	12 January 2019
Jim Perkins	jim@independent-mentors.co	5	LinkedIn	3 January 2014	6 January 2019
Amanda Jones	ajones@businessexperts.com	48	LinkedIn	29 September 2014	22 September 2019

License tokens available to allocate: 21

Allocating Licenses to a Mentor

Each mentor may be allocated a number of licenses that they can use to invite clients to use Finanscapes (see the “Inviting a New ” section for more details). You can see from this screen how many licenses each mentor has left – and if you hover over a row and press the cog on the right you can allocate them more or fewer licenses as required. The purple bar at the bottom of the table shows you how many licenses you have available to allocate.

NOTE: ADMINISTRATORS ARE AUTOMATICALLY MENTORS TOO, ABLE TO INVITE USERS VIA THE MENTOR PAGE AND VIEW CLIENT PLANS. YOU DO NOT NEED TO ALLOCATE INVITE TOKENS TO ADMINISTRATORS, THEY ISSUE FROM THE BALANCE OF TOKENS THAT ARE NOT ALLOCATED TO YOUR MENTORS.

Inviting a New Mentor

If you select the “Mentor Invitations” tab you’ll be presented with a list of mentors that you’ve invited but that haven’t yet accepted their invitation. Mentor licenses are free – you can invite as many mentors as you wish. However, **all mentors can access all client plans** (this significantly simplifies user administration and team working etc and it’s unlikely you’ll have mentors that can be trusted with one client plan but not another).

The screenshot shows the 'Mentors' page in the FINANSCAPES system. At the top, there's a navigation bar with 'Survival Budget' at £0.00 and buttons for 'Log Out', 'Account', and 'Help'. The breadcrumb trail is 'Organisations > Business Experts > Mentors'. Below this, there are tabs for 'Mentors' and 'Mentor Invitations'. A search bar labeled 'Find a user:' is present, followed by a table with the following data:

NAME	EMAIL	LICENSES ALLOCATED	INVITE CODE	DATE INVITE ISSUED
Jack Danish	jd@businessexperts.com	0	acewu597	29 October 2014

Below the table is a form with fields for 'Mentor's Name', 'Email Address', and 'Licenses Reserved'. A purple banner at the bottom of the table area states 'License tokens available to be allocated: 21'.

Fill out the name, email and licenses box at the bottom of the table and press save to invite a new mentor. We will send them an email explaining what they need to do to join as a mentor, including their unique invitation code. That invitation code is also shown on this page – they can enter the code directly on [the invitation code page](#) if the email gets lost. See the “Accepting an Invite Code” section for more information.

NOTE: YOU DON'T HAVE TO ALLOCATE ANY LICENSES TO A MENTOR – THEY WILL STILL BE ABLE TO ACCESS YOUR CLIENTS' PLANS, THEY JUST WON'T BE ABLE TO INVITE ANY NEW CLIENTS THEMSELVES.

Revoking a Mentor Invitation

If you need to revoke a mentor invitation, hover over the relevant row and press the red rubbish bin icon. Any licenses allocated to them will be credited back to your organisation and their invitation code will be invalidated so they can no-longer use it. However, **they will not be notified** – it is up to you to let them know if necessary.

Mentoring for your Organisation

(see “Accessing an Organisation as an Administrator or Mentor” for details on how to access your organisation, then click the “Mentees” row on the card).

The mentor page gives you an at-a-glance view of the clients supported by your organisation. Here you can see the user's name, email address and access details:

NAME	EMAIL	PLANS	LOGIN METHOD	LAST LOGIN	ACCESS EXPIRES
Bob Craddick	bob@home.org	1 Plan	Twitter	27 January 2014	28 January 2015
Charles Darwin	charles@thebeagle.co.uk	2 Plans	Google	4 August 2014	9 June 2015
Pete Duggle	peted@gmail.com	Origin Publishing		13 June 2014	13 June 2015
Robin Banks	rob@iron-heights.com	Galapagos Explorations Inc		15 September 2014	7 April 2015

If you click the drop-down arrow in the plans column you'll see a list of the plans that the user has created, and the completion status of each.

Accessing a Client's Plan

Select the plan from the list (see the screenshot above) and you'll be taken straight into the plan – with the same views and controls that the user has themselves. You can even update the plan live while the client is on the phone if you wish (they will need to refresh the relevant page to see your changes).

You'll know you're viewing a client plan because a bold banner is displayed across the page. On the right of the banner you're reminded whose plan it is – click the cross to the right to return to the mentor console.



NOTE: YOU CAN ALSO CREATE NEW PLANS OR CLONE EXISTING ONES FOR A USER VIA THEIR FORECASTS PAGE. THIS MAKES IT EASIER TO DEMONSTRATE CHANGES YOU RECOMMEND, WITHOUT MODIFYING THEIR ORIGINAL PLAN/BASELINE.

Inviting a New Client

If you select the “User Invitations” tab you’ll be presented with a list of users that you’ve invited but that haven’t yet accepted their invitation.

The screenshot shows the 'User Invitations' tab in the FINANSCAPES system. At the top, there is a search bar with the text 'Find a user: Search by name or email' and a 'Go' button. Below the search bar is a table with the following columns: NAME, EMAIL, INVITE CODE, and DATE INVITE ISSUED. The table contains two rows of data:

NAME	EMAIL	INVITE CODE	DATE INVITE ISSUED
Sam Tyler	st@gmail.com	7Rx7izdJ	15 September 2014
Hinodeh Li	h@hinodehcoration.com	aPmHToXj	24 June 2014

Below the table, there are two input fields: 'User's Name' and 'Email Address'. At the bottom of the interface, a purple banner states: 'You can invite a further 21 users.'

Fill out the name and email boxes at the bottom of the table and press save to invite the user to use finanscap.es. We will send them an email explaining what they need to do to join, including their unique invitation code. That invitation code is also shown on this page – they can enter the code directly on [the invitation code page](#) if the email gets lost. See the “Accepting an Invite Code” section for more information.

NOTE: YOU CAN ONLY INVITE USERS IF YOU HAVE BEEN ALLOCATED ONE OR MORE LICENSE TOKENS BY YOUR ORGANISATION’S ADMINISTRATOR. CONTACT THEM IF THE NAME AND EMAIL BOXES DO NOT APPEAR IN THE TABLE AS ABOVE.

Revoking a Client Invitation

If you need to revoke a client invitation hover over the relevant row on the User Invitations tab and press the red rubbish bin icon. Their invitation code will be invalidated so they can no longer use it, and their license will be re-credited back to you so you can allocate it to someone else. However, **they will not be notified** – it is up to you to let them know if necessary.

NOTE: ONCE AN INVITATION HAS BEEN ACCEPTED AND THE CLIENT HAS STARTED TO USE FINANSCAPES YOU CANNOT RE-ALLOCATE THEIR LICENSE.

Help!

Each page in Finanscapes has help available – just press the icon in the top right corner.



The application will automatically prompt your users if we think they're "stuck". For example, if they're on the plan overview page but haven't entered any costs we'll display a pointer, showing them what to do next.

If you still need help please get in touch at help@finanscapes.com or call us on 0800 0 24 89 24. Finanscapes is designed to be as easy-to-use as possible, so if something's not clear we'd be grateful if you could let us know so we can fix it.

About Finanscapes®

Background

The viability of businesses can be significantly improved by removing the complexity and fear of financial planning. Helping entrepreneurs to assess their business and put together a financial plan is the bedrock of business and incubation support.

The Finanscapes software is designed around feedback from real businesses and start-ups to radically simplify and improve this process. It is flexible enough for a mentor to use as part of a free-flowing conversation over the client's own business/ idea – and builds up the cashflow graphs and a P&L forecast as they go along. In fact it's so intuitive that many users create their first draft plans (and hit the first major startup questions) on their own, before their first mentoring meetings.

Focus on Higher-Value Support

Finanscapes significantly increases the quality of decision-making by taking away the complexity and fear of numbers. Business owners quickly grasp the important and urgent questions on their own terms, allowing incubators to spend time on the answers rather than the importance of the questions. ***Better-informed clients and higher value from mentoring time can only mean stronger, more viable businesses and a higher growth-rates.***

Design Principles

Tools like Facebook and Twitter have set high expectations for today's users. Clunky spreadsheets and dated websites are unnecessary barriers that disengage and discourage them.

Finanscapes is different. We took the latest web technologies and a fundamentally different approach to other business planning applications. We don't impose any restrictions or an endless “next, next, next” approach; instead the user steps straight in to build up their plan in whichever order suits them best, and we provide a Dashboard to show them just how complete their thinking is. This flexibility is invaluable for users to feel full ownership of their plan.

User Feedback

Our User Acceptance Testing with Enterprise Inc and Princes Trust businesses suggests that the Finanscapes software can fundamentally change the way an owner plans and manages their business.

Finanscapes can be a real enabler for entrepreneurs – allowing an unlimited number of forecasts or scenarios to be created, each with a series of product or service lines. No complexity, no barriers, no excuses!

Testing

This is one of our key differentiators.

We combine a detailed knowledge of finance with a tireless focus on software quality. We don't deliver a change until we've written automated tests for it – and then we run them every time we modify anything else, to make sure it still works. Most software companies gloss-over the functional design and never even write structured tests, let alone automate them. Can your business afford to rely on that sort of software?

Over 3000 test steps are run against the Finanscapes tool every day – and long before a change is released to clients. Of course, we're not perfect – but you can be assured we make every effort to prevent defects and address them as quickly as possible once identified.

Availability

The Finanscapes software is delivered online using some of the most resilient infrastructure in the world. Your clients can focus on their planning, not accessing their plan – whenever and wherever they're most productive.

Functionality

We are ruthless about simplicity. While the calculations we run to provide Cashflow Forecasts and P&L Statements are necessarily complex, we hide this from users and make it as simple as possible for to build their plan.

Finanscapes captures data in four key areas:

- Startup Costs
- Business Overheads
- Equipment
- Loans
- and for each one of an unlimited number of products:
 - Unit Costs
 - Sales Forecasts (and prices)

With this information we present the user with:

- Easy-to-understand cashflow graphs to highlight funding shortfalls and visualise organic success
- Profit & Loss statements showing Gross Profit and Net Profit for at-a-glance viability checks
- Per-product Key Performance Indicators and comparisons including break-even points (£ and units) to inform pricing, marketing and sales activities
- A clear, single page view of sales targets for the coming month to print and stick up on the office wall!

Each user can create as many plans as they wish and add as many product or service lines as they want. They can update their plans at any point to reflect actual performance and bring the plan back up to date with reality.

Try it for yourself at finanscapes.com.

Limitations

Finanscapes is planning and visualisation software, not accounting software. It does not provide advice and we can accept no liability for incorrect or invalid business decisions taken using information from Finanscapes. Please see our terms and conditions for more details.

About Us

"Business Forecasts made Simple, Easy and Painless"

Finanscapes is a registered trade mark and trading name of Eighth Wonder Ltd (company number 7794248, established 2011).

Coming from a blue-chip Financial Services background, we are a small business that specialises in simplifying financial software.

The Finanscapes project was initiated as a collaboration between several specialist start-up businesses.