finPOWER Connect Cloud 3 Customisation Guide

Version 3.12

16th August 2019

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Disclaimer

This document contains information that may be subject to change at any stage.

All code examples are provided "as is".

Version History

Date	Version	Name	Changes
07/10/2016	3.00	PH	Created.
04/01/2017	3.01	PH	Added Tasks section and restructured.
24/01/2017	3.02	PH	Added "Add Menu" section.
12/05/2017	3.03	PH	Updated Actions Script.
31/07/2017	3.04	PH	Added Theme, Other page and Script example.
10/10/2017	3.05	PH	Updated Menu wizard section.
04/01/2018	3.06	PH	Updates relating to version 3.01 of finPOWER Connect.
28/5/2018	3.07	PH	Updated to document WebUI Application Shortcuts.
01/08/2018	3.08	PH	Includes HTML Widget theming.
30/8/2018	3.09	PH	Updates to configuration form.
10/01/2019	3.10	PH	Updated for 'General Script' type menu items.
04/07/2019	3.11	PH	Processes View details.
16/08/2019	**3.12**	**PH**	**Important Information section added.**

Introduction

This document details how finPOWER Connect Cloud (from herein, often referred to as "finCC" to avoid confusion with the Desktop version of finPOWER Connect) can be customised.

Customisations include:

- Security
- Theme Colours and Logos
- Custom Homepage
- Custom Pages
- Custom Task Views
- Custom Menus

NOTE: This document should be used in conjunction with the **finPOWER Connect 3 HTML Widgets** document.

Important Information

Application Shortcuts

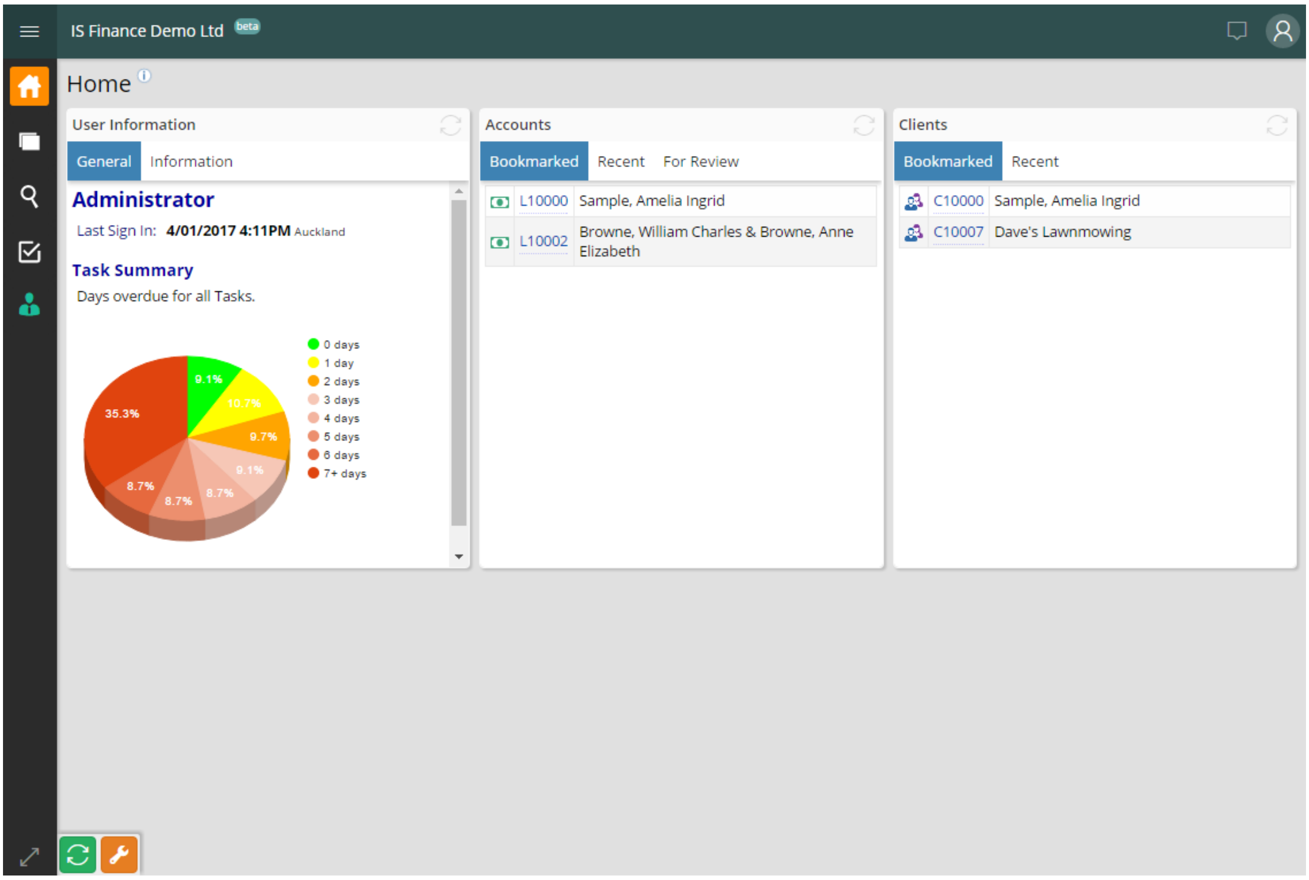
For Application Shortcuts to work properly in finPOWER Connect Cloud, either from Summary Pages, HTML Widgets or any other part of the system, the "app://" protocol MUST be specified in either lower-case or upper-case, e.g., "app://" or "APP://".

Mixed case protocols such as "App://" may not work in all scenarios.

User Interface Overview

finPOWER Connect Cloud is a Single Page Application (SPA). This means that as you navigate around the User Interface, no additional Web pages are loaded (although additional content is loaded as required).

The User Interface is split into three parts:

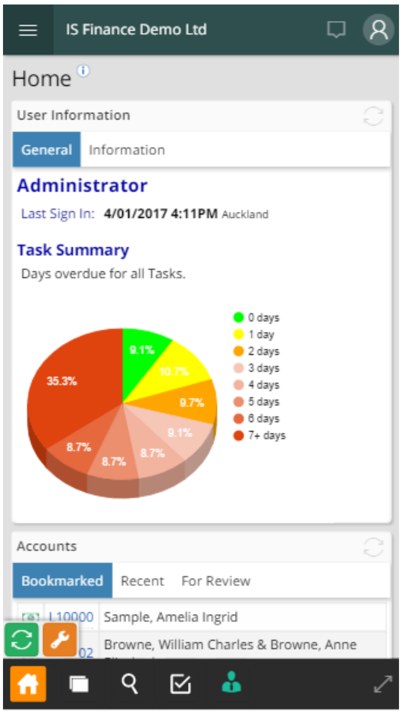


- **Title Bar**
  - This contains access to the Main menu on the left and the User and Notification menus on the right.
- **Side Navigation Bar**
  - Each icon represents a "Main View". These are similar to tabs and clicking between them shows you a different "View" in the Content Area.
    - Currently there a three system views:
      - Home
      - Records
      - Search
    - The three coloured icons represent Custom Pages which will be discussed later.
- **Content Area**
  - This displays the content of the currently selected "Main View".
    - In the screenshot above, the "Home" view is displayed. This is the default view presented after signing in.

Mobile

The finCC User Interface is responsive. This means that it varies automatically based on the screen size.

When viewed on a small device such as an iPhone, the Side Navigation Bar may move to the bottom, e.g.:



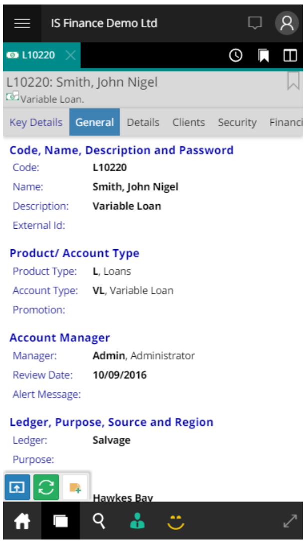
Other User Interface changes will also take place to account for the smaller viewing area.

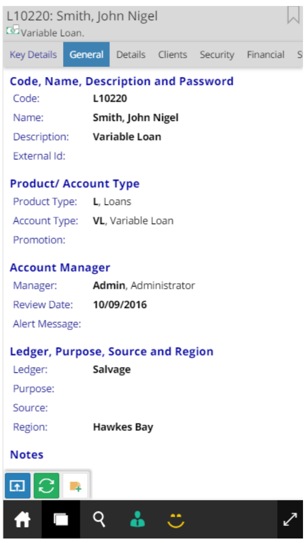
The Maximise Viewable Content Button

The double-headed arrow icon at the bottom of the Side Navigation Bar (or on the right-hand side in Mobile mode) maximises the viewable content (and restores the view when clicked a second time).

This is very useful on mobile devices.

Examples of maximised content are shown below:





This button is designed to be toggled on and off as required. It hides the top navigation bar and various other User Interface components.

Menus

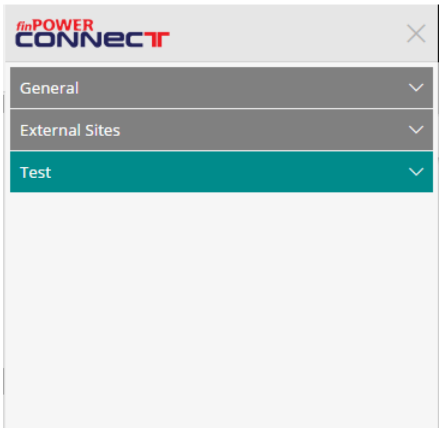
Unlike the Desktop version of finPOWER Connect, which is heavily menu-driven, i.e., just about every action can be performed from the menu; finCC is more record-based, e.g., if you want to send an Email to a Client, you first locate the Client record and then use the Email Message action from there.

Also, views such as the Search View take the place of the various Search forms which can be launched from the menu within finPOWER Connect.

Main Menu

The Main Menu shows actions that do not logically fit into either being launched from a record (e.g., like the Email Message action on the Client record form) or the system views (e.g., like the Search View).

This menu can be customised and currently contains no system-defined items (although the "Test" sub-menu demonstrates how system-defined items will be distinguished from custom items).

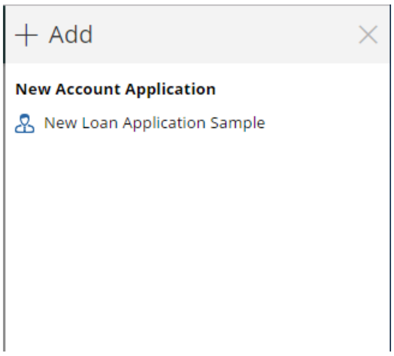


Add Menu

The Add Menu only shows if configured.

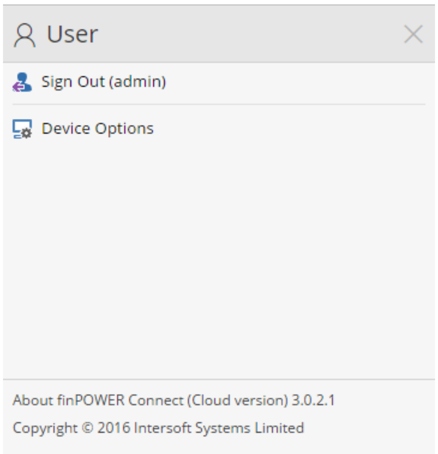
By design, it should only display actions that relate to adding a new record, e.g., a new Loan Application.

This menu can be customised and set to display "New Account Application" items. This will list all available Account Application Types that have a Data Capture Method of "HTML Widget".

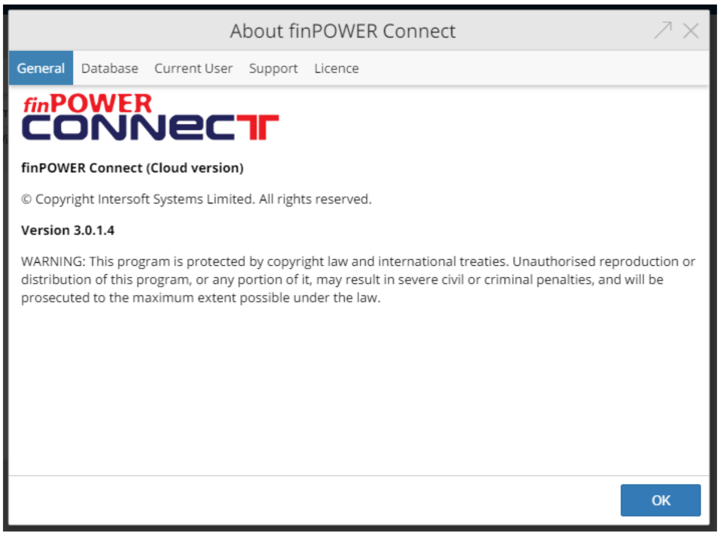


User Menu

This non-customisable menu contains User-related actions, the most obvious being to "Sign Out":



The bottom section of this menu shows the current version of finPOWER Connect Cloud. Clicking this section shows the "About" form:

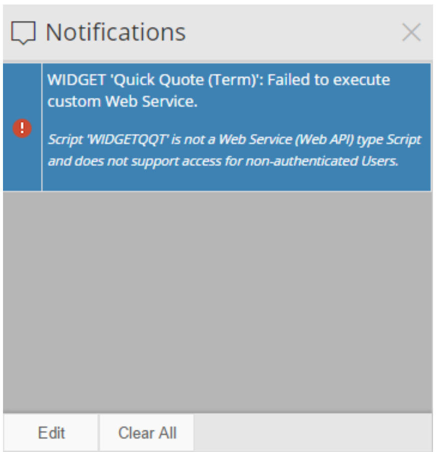


Notifications Menu

This shows the Notifications list.

This shows notifications such as attempting to access something when the User-session has timed out.

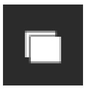
Notifications can be individually cleared.



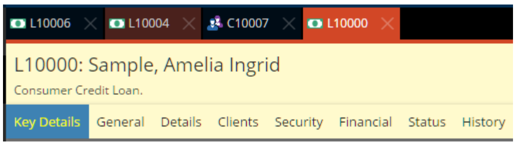
Records View

The records view is where all main records such as Accounts and Clients are viewed.

This is represented by the overlapping rectangles icon:



Multiple records can be viewed in a tabbed interface. The number of available tabs is dependent on the device being used but ranges from 2 to 8.



The selected tab is shown in the theme's contract colour (e.g., orange). The last visited tab (in this case, L10004) is highlighted slightly which makes it easier to track which records you have visited.

The right-hand side of this view shows the following:

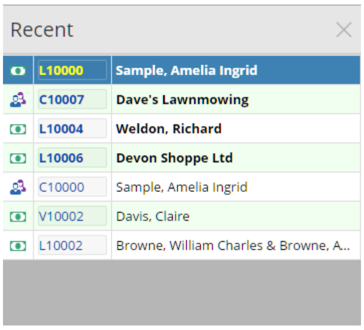
The red bookmark icon shows that this record is currently bookmarked by this User.

The three other icons are:

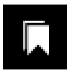
- **Recent**

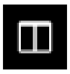
  - Shows a list of recently viewed records. Bolded items are records that have been visited in the current session.

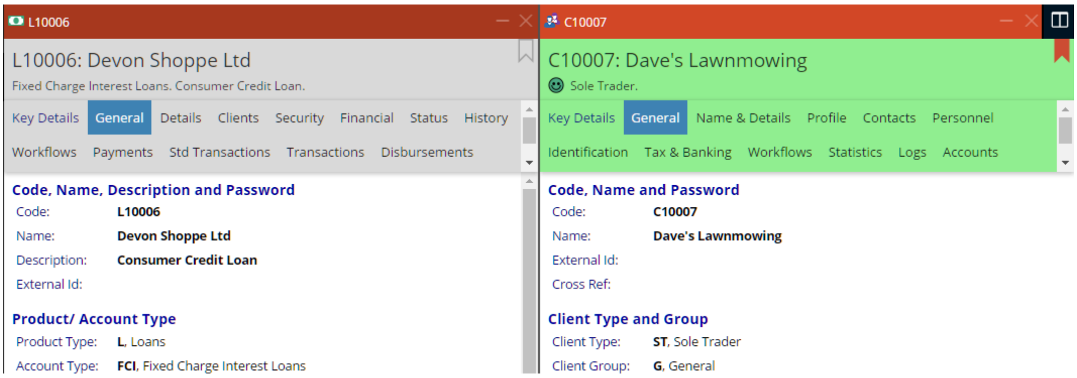


- **Bookmarked**

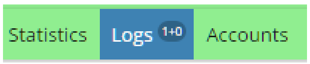
  - Shows a list of bookmarked records.

- **View Side by Side**

  - Views all open tabs side-by-side, e.g.:



Records are presented with a form heading (e.g., L10006: Devon Shoppe Ltd) and below this a record summary.

Below the form heading is a list of tabs (or pages) for that record. Certain tabs may show a bullet, e.g.:

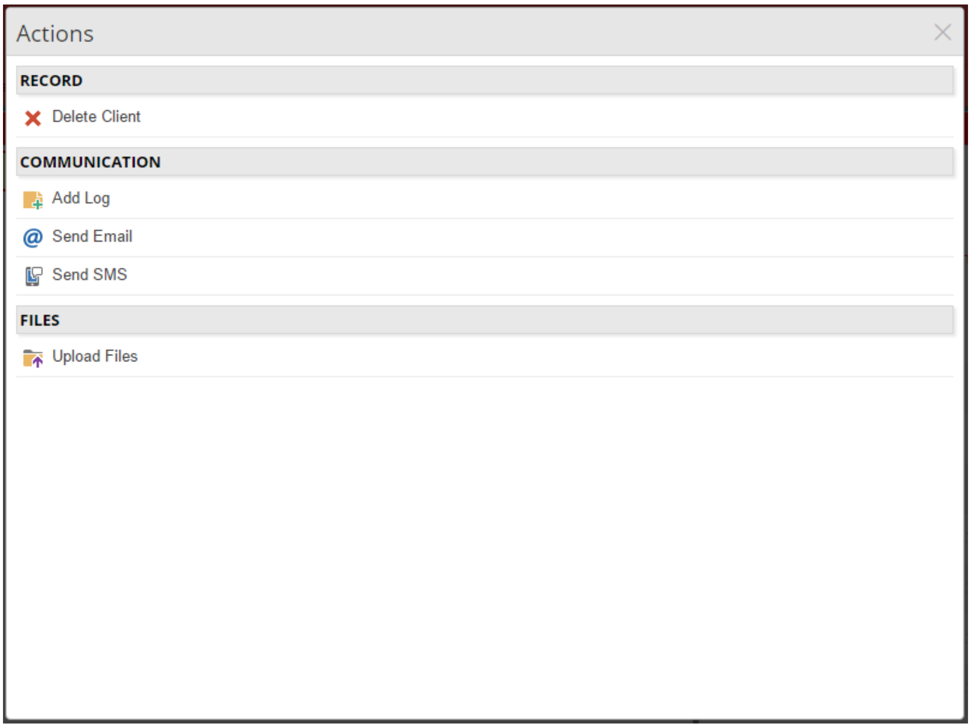


This typically indicates that there is incomplete or current information on that page (e.g., 1 unactioned Log).

At the bottom of each record are a series of buttons:

- **Actions**

  - Shows a popup of all actions available for this record, e.g.:



- **Refresh**
  
  - Refreshes the record.
- **Add Log**
  
  - Add a new Log for the record.
  - This is a shortcut to the "Add Log" item shown in the Actions popup for the record.

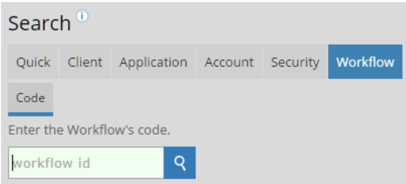
Search View

This is represented by the magnifying glass icon:

The default search is a "Quick Search" which is the same as the Quick Search within finPOWER Connect.

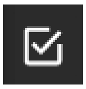
However, in finPOWER Connect you can re-search to perform a "deeper" search. In finCC, the search is limited to a single depth.

Other searches are available based on licenced add-ons, e.g.:

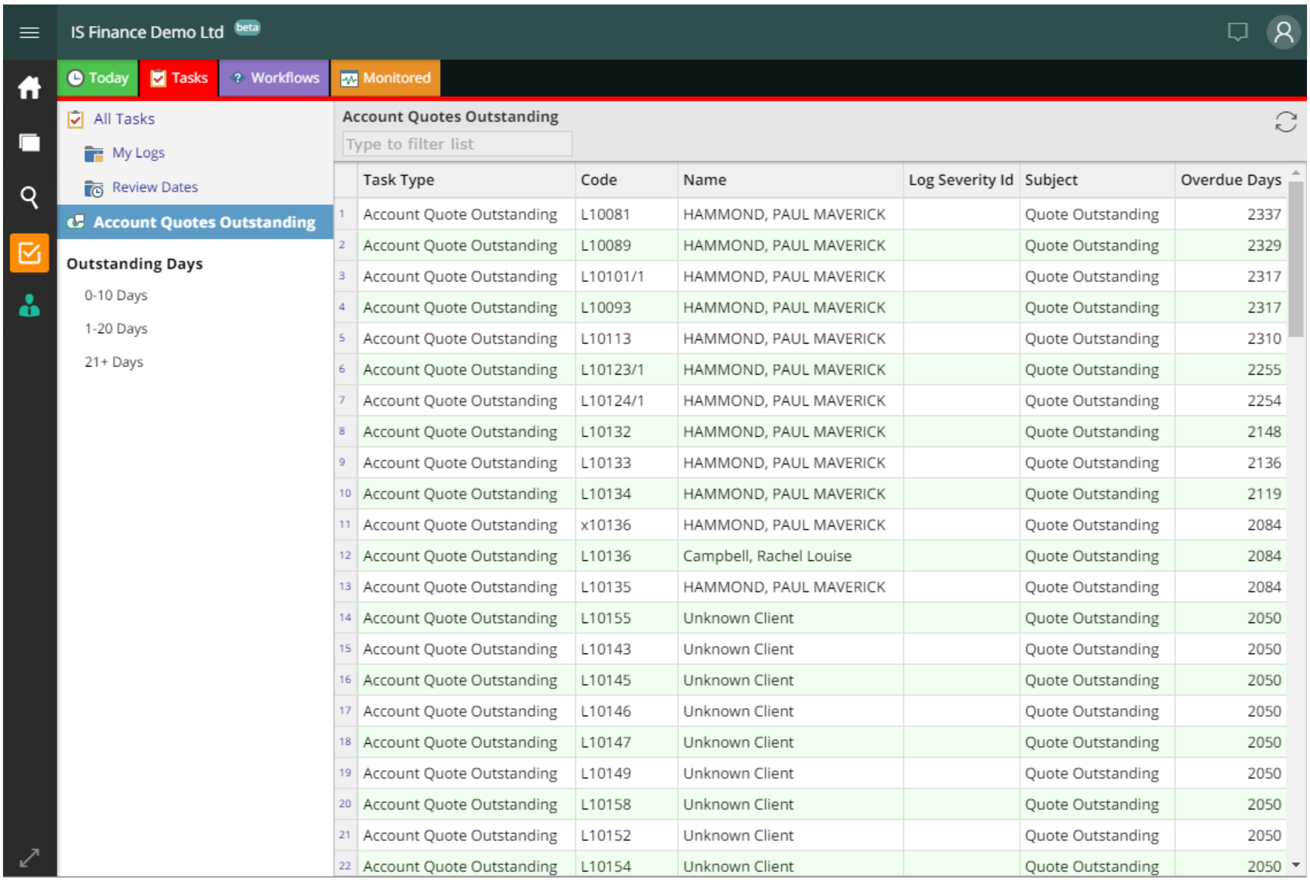


Tasks View

This is represented by the task icon:



This view displays a list of Task Groups, each of which is represented by a tab which can have an icon and a colour, e.g.:



HTML Widgets

HTML Widgets are the building blocks of custom pages and custom Menu Items and can also be used for custom forms and custom Task views.

For example, a Page can display one or more Widgets in various layouts and custom Menu Items can launch Widgets.

There are three types of HTML Widgets:

- **HTML Widget**
  - These are supplied with finPOWER Connect and can be used as is or imported using the Action at the bottom left of the Scripts form in finPOWER Connect.
- **HTML Widget Script**
  - These are Scripts that allow custom Widgets to be created.
  - HTML Widgets can be used within finPOWER Connect and in finCC.
- **External URL**
  - A URL to an external Website or Web Application.

For more information on creating HTML Widget Scripts, see the **finPOWER Connect 3 HTML Widgets** document.

Smart Lists

Smart Lists are the building blocks of the Tasks view.

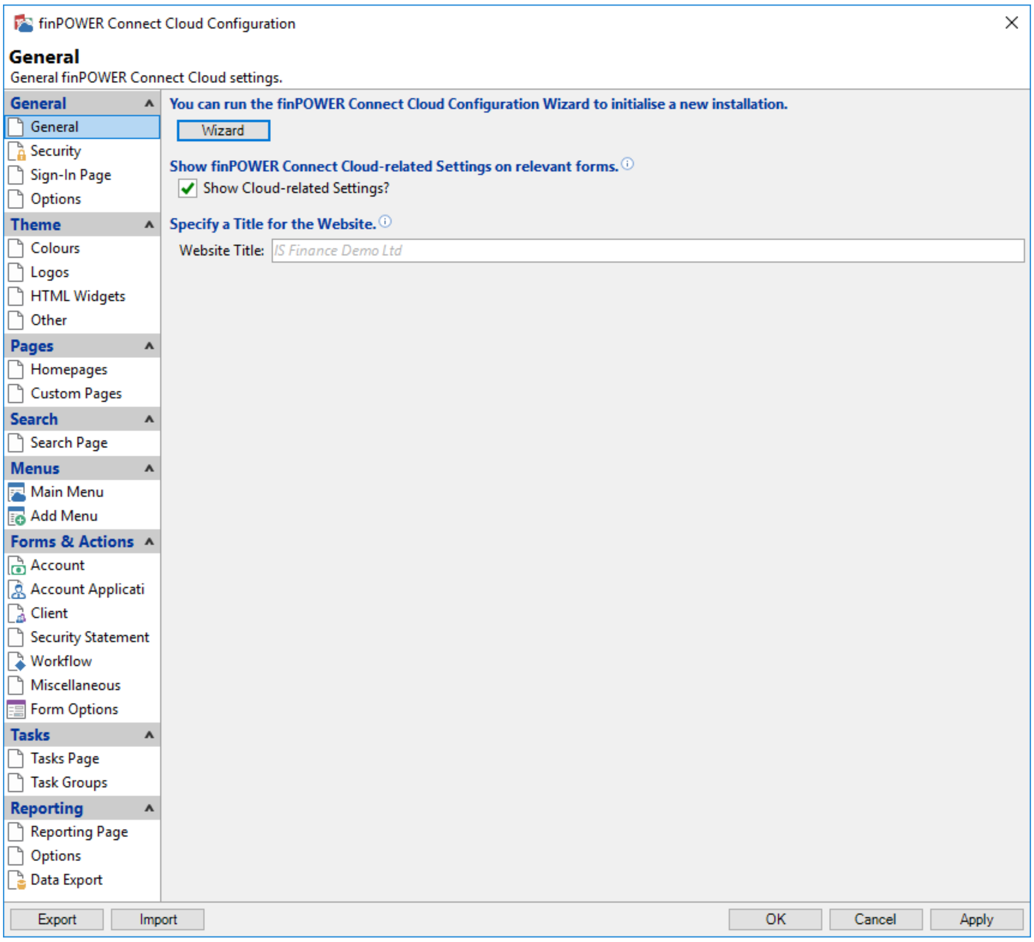
For example, the Task View may contain several Task Groups (represented by tabs) that each contain several Smart Lists.

Smart Lists are typically used to return a list of records such as Accounts or Workflows. These lists can be filtered in different ways.

For more information on creating Smart List Scripts, see the **finPOWER Connect 3 Smart Lists** document.

finPOWER Connect Cloud Configuration Form

All customisation of finPOWER Connect Cloud is performed from within finPOWER Connect via the Tools, Web, finPOWER Connect Cloud Configuration form:



This form has buttons at the bottom to Export and Import settings.

When exporting settings, you are prompted whether to include any Scripts that are referenced within the Settings.

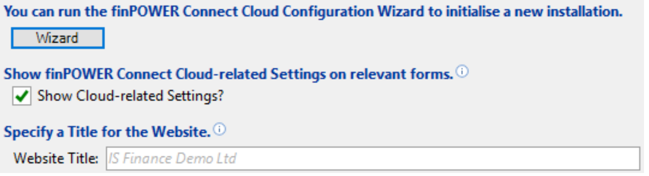
Importing simply takes you to the "Information Import" wizard which can also be opened from File, Import/ Export Information, Import Information.

The following sections describe how finPOWER Connect Cloud is customised using this form.

General (Settings)

General

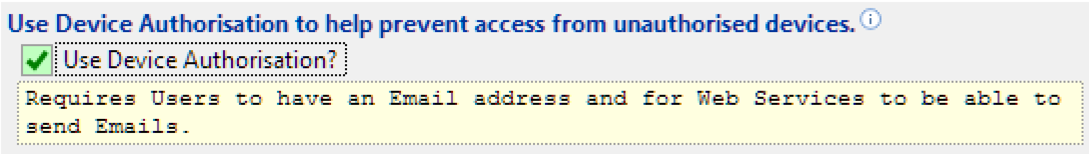
This page defines general settings:



- **finPOWER Connect Cloud Configuration Wizard**
  - This button runs a wizard that allows certain configuration settings to be generated such as the Tasks view.
- **Show finPOWER Connect Cloud-related Settings on relevant forms**
  - Show Cloud-related Settings?
    - Indicates whether finCC is being used and therefore any forms that contain information specific to finCC should display it. These forms include:
      - **NOTE:** Currently this setting does nothing since no forms yet contain any finCC based information.
- **Specify a Title for the Website**
  - Website Title
    - By default, the Database Name (defined under Global Settings) is used as the Website Title, but this can be overridden.

Security

This page defines security settings:

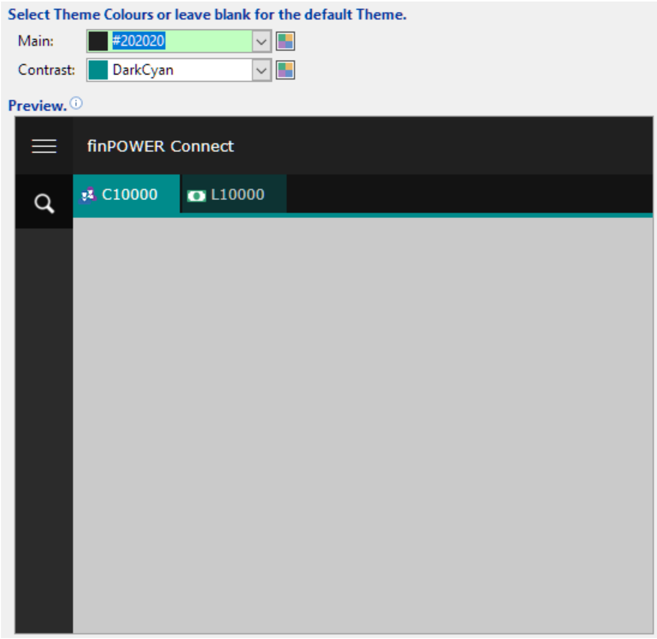


- **Use Device Authorisation to help prevent access from unauthorised devices.**
  - Use Device Authorisation?
    - Indicates whether to use Device Authorisation. When activates, all Users accessing the system must have a valid Email address and the finPOWER Connect Web Services must be configured with SMTP Server details.
    - Upon first signing in using a new Web browser or device, the User will be Emailed an Authorisation code that they must enter before proceeding.

Theme (Settings)

Colours

Both Main and Contrast colours can be customised on the **Theme**, **Colours** page:



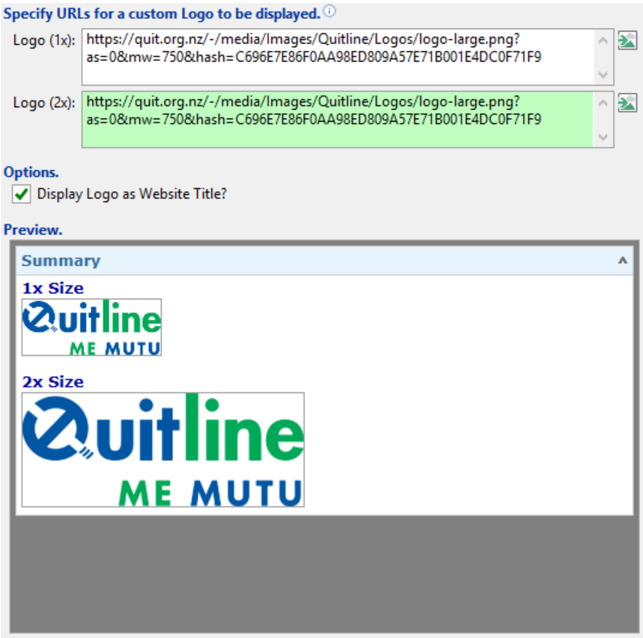
The colours can be previewed before being applied.

NOTE: It is recommended that dark colours are used.

Also, derived colours in the preview (e.g., the inactive tab in the preview above) may not match the finPOWER Connect colours exactly.

Logos

The finPOWER Connect logo used is various places can be customised (e.g., to display a Finance Company's Logo) via the **Theme**, **Logos** page:



NOTE: *The above logo has nothing to do with finPOWER Connect or Intersoft Systems, it is simply an example of the type of Logo that fits well into finPOWER Connect Cloud.*

- **Specify URLs for a custom Logo to be displayed.**
  - Logo (1x):
    - The URL or Data URI of an image file.
  - Logo (2x):
    - The URL or Data URI of an image file that should be used on high DPI displays.
  - **NOTE:** The button to the right of the URLs allows an image file to be located and a Data URI to be generated. This embeds the image data in the URL which avoids having to reference external resources.
- **Options.**
  - Display Logo as Website Title?
    - Checking this will display the Logo instead of the Website Title.
      - The Website Title will be used as a Tooltip for the Logo.

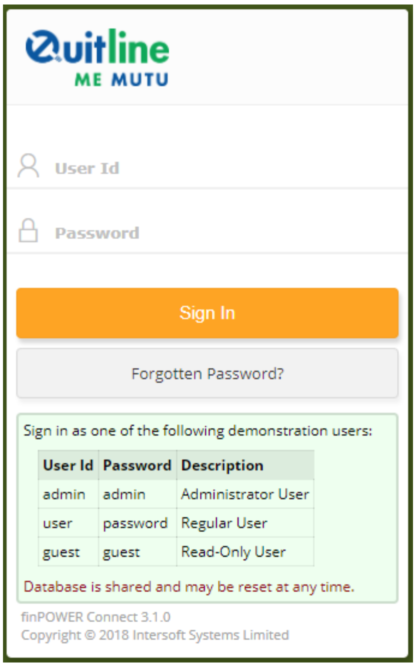
The logo images should ideally:

- Fit in with the Theme Colours
- Be PNG format with a transparent background
  - Preferably with anti-aliasing
- Be 48 pixels and 96 pixels in height
  - Other sizes will be scaled and may not look as sharp
  - Wider, rectangular logos will look better
- Contain no white-space around the image
  - The border shown on the preview allows you to see white-space

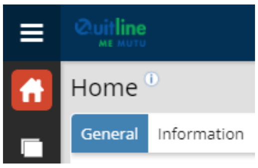
NOTE: The 2x Logo will be used on High DPI displays to provide a sharper looking image.

These images are used in various places in the finPOWER Connect Cloud User Interface, e.g.:

- Sign-In page:



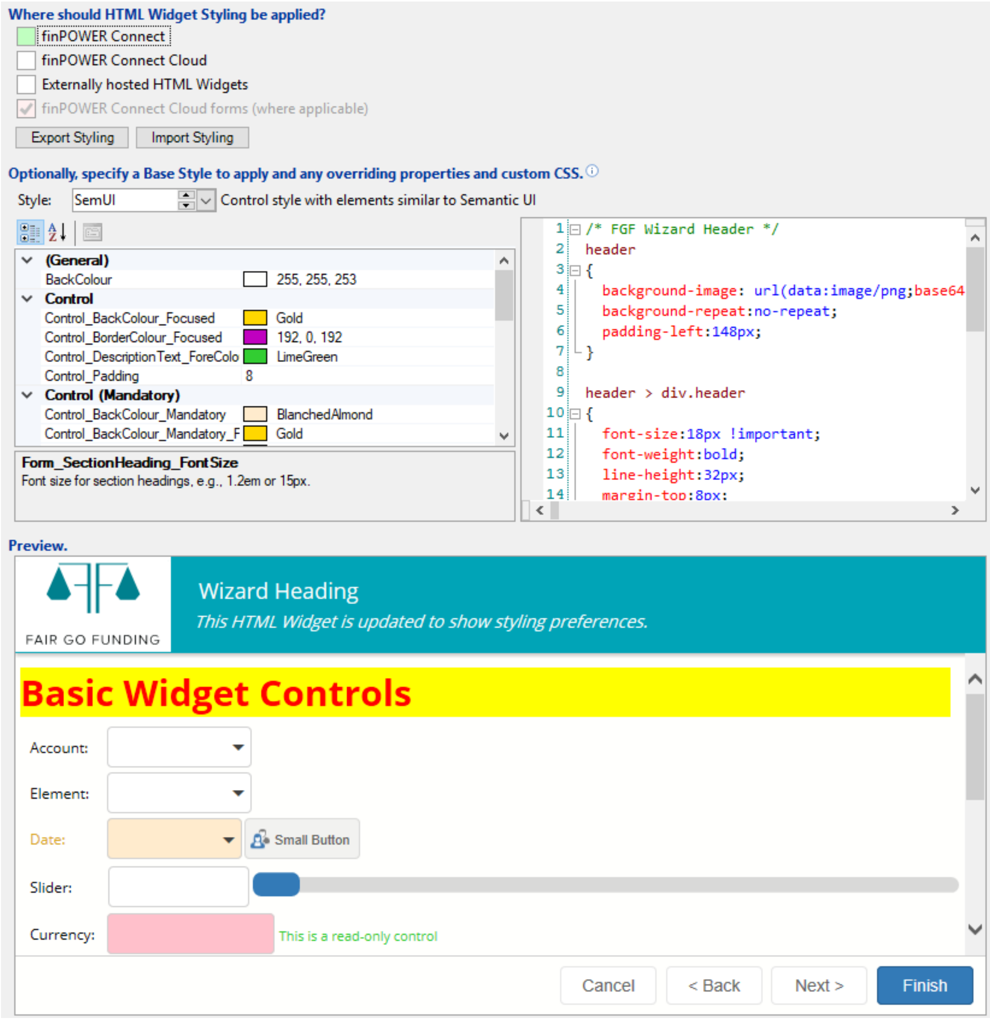
- Website Title (if configured to show a logo):



HTML Widgets

HTML Widgets have a built-in style that matched finPOWER Connect Cloud.

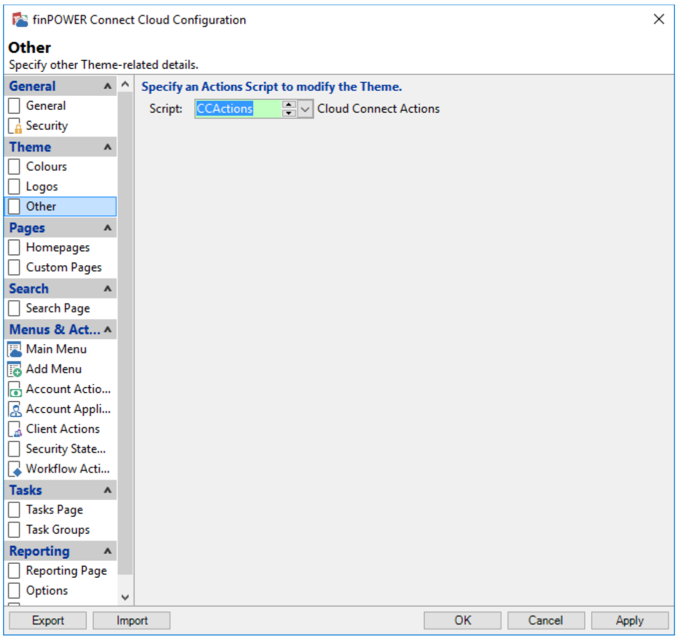
In certain situations, it may be desirable to apply different styling.



- **Where should HTML Widget Styling be applied?**
  - This series of checkboxes allows you to specify where the styling specified on this page should be applied.
  - **NOTE:** The Options page of the Scripts form has a "Never apply Styling to this HTML Widget?" option which will always override these settings.
- **Optionally, specify a Base Style to apply and any overriding properties and custom CSS.**
  - Style:
    - Allows an alternate control style to be selected.
    - Currently there is only a single option: SemUI
  - Properties grid:
    - Common control properties that can be updated.
  - CSS Editor:
    - Ad-hoc CSS to apply.
    - Use the "Inspect Element" functionality in a browser such as Google Chrome to determine the CSS class to override.
- **Preview.**
  - This is only displayed when the form is over a certain height.

Other

A Script can be defined to modify the theme:



The Script is a "finPOWER Connect Cloud Actions" type Script that is passed the theme information.

The Script can then modify the theme, e.g.:

- Based on the currently signed in User
- Based on a User's Role
- Based on the User being an External Party User, e.g., a Dealer employee
- Based on the Page URL
    - This can be used to modify the theme of the Login page before the User in known
        - You might provide a link for External Parties that contains their External Party Id, e.g.: https://www.myfinccinstallation/Login?XP123

The following example demonstrates custom theming:

```
Public Function Main(source As Object,
                     headerInfo As finCloudConnectFormHeaderInfo,
                     requestInfo As finScriptRequestInfo) As Boolean

  ' Assume Success
  Main = True

  ' Handle
  Select source.GetType()
    Case GetType(finCloudConnectTheme)
      ' Theme
      Main_Theme(DirectCast(source, finCloudConnectTheme), requestInfo)

  End Select

End Function

''' <summary>
'''  Theme.
''' </summary>
Public Sub Main_Theme(theme As finCloudConnectTheme,
                      requestInfo As finScriptRequestInfo)

  Dim n As Integer
  Dim BranchId As String

  If Len(requestInfo.AuthenticatedUserId) = 0 Then
    ' ----------
```

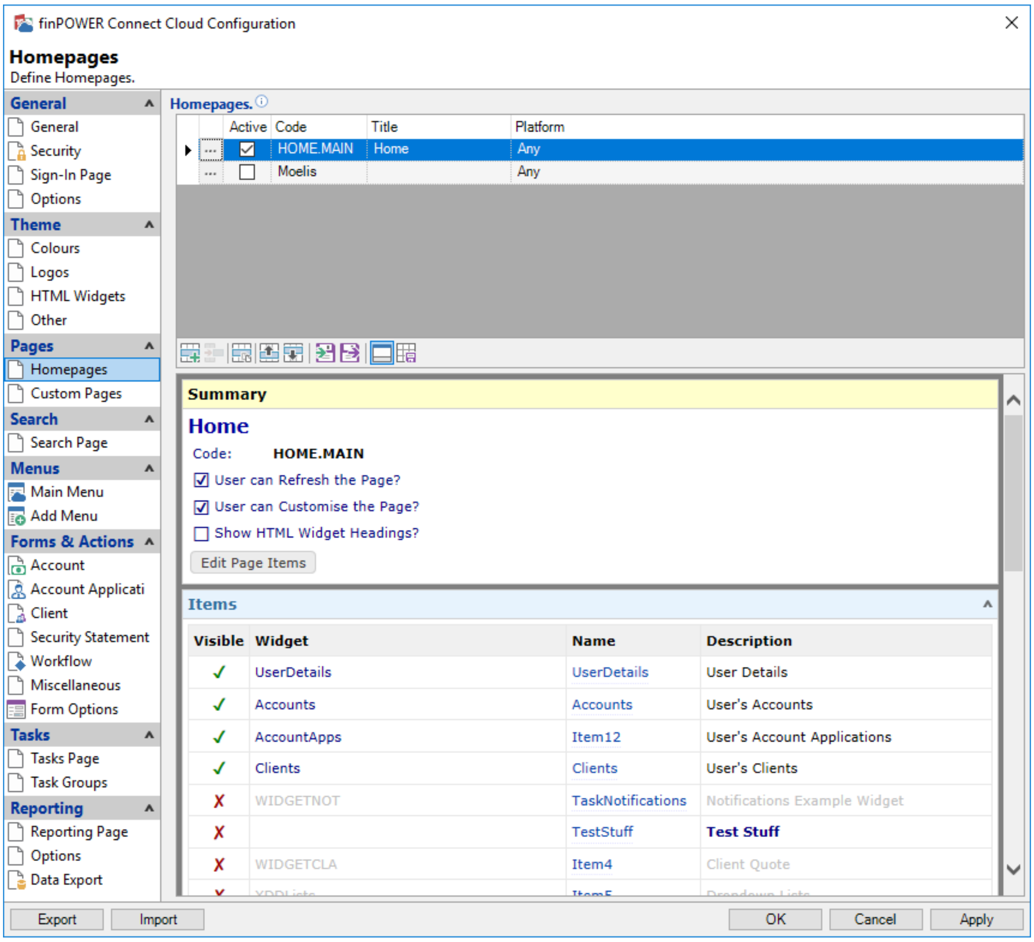
```
    ' Login page
    ' ----------
    ' Find Branch
    ' NOTE: Take the query part of the URL as being a Branch Id
    n = InstrRev(requestInfo.PageUrl, "?")
    If n <> 0 Then
      BranchId = Mid(requestInfo.PageUrl, n + 1)
    End If

    ' Branch Theme
    With theme
      Select Case UCase(BranchId)
        Case "HO"
          .MainColourBackground = "red"

        Case "NAP"
          .MainColourBackground = "yellow"
      End Select
    End With
  Else
    ' -----------
    ' Application
    ' -----------
    ' User Theme
    With theme
      Select UCase(finBL.CurrentUser.UserId)
        Case "ADMIN"
          .MainColourBackground = "#FFFF00"

        Case "PH"
          .MainColourBackground = "orange"
      End Select
    End With
  End If

End Sub
```

Pages (Settings)

Homepages and Custom Pages are accessed via the Side Navigation Bar in finPOWER Connect Cloud:

Homepages and Custom Pages

Custom pages (including customisations to the Homepage) are made via the **Homepages** and **Custom Pages** pages on the finPOWER Connect Cloud Configuration form.



- Pages are added using the Add or Duplicate buttons below the grid.
  - The order of pages can be changed using the Up and Down buttons.
- Only a single Homepage will ever be displayed to a User.
  - This is based on the following (the list of Homepages is visited top-down):
    - Page must be "Active"
    - User must have permission to view the Page.

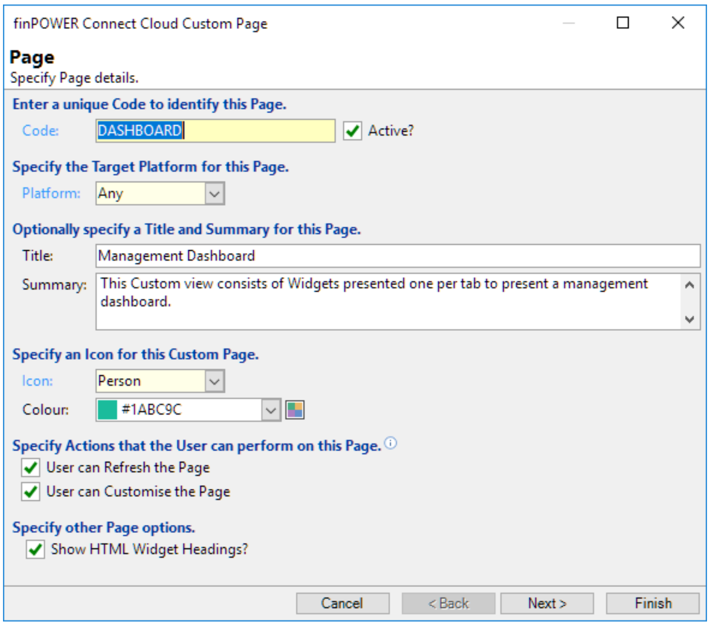
        - This may be defined by a Permission Key or a list of valid External User types that can view the page.
    - User's Platform (Desktop or Mobile) must match the Page's Platform.
- Multiple Custom Pages can be displayed.
    - These follow the same viewing rules as Homepages.

Homepages and Custom Pages are added and edited via the finPOWER Connect Cloud Page wizard.

Custom Page wizard

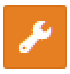
Page

This allows entry of general Page details.

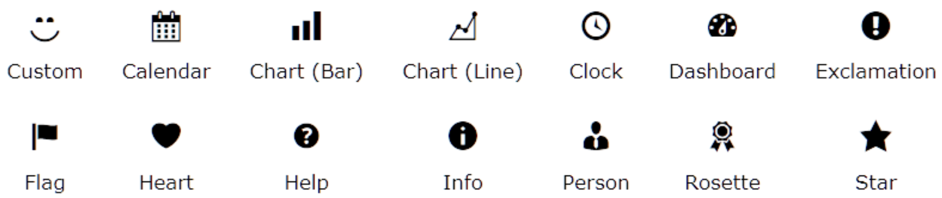


- **Enter a unique Code to identify this Page**
  - Code
    - A unique code up to 25 characters long.
    - **NOTE:** Codes must be unique across Homepages and Custom Pages.
  - Active?
    - Inactive Pages will never be displayed.
- **Specify the Target Platform for this Page**
  - Platform:
    - Determines whether this Page is valid for Desktop, Mobile or both (Any).
- **Optionally specify a Title and Summary for this Page**
  - Title:
    - This will typically be displayed at the top of the Custom Page.
  - Summary:
    - This will typically be displayed as a tooltip for the Custom Page's Title.
- **Specify an Icon for this Custom Page**
  - **NOTE:** Not applicable to Homepages; these will always use the Home icon.
  - Icon:
    - The Icon to display for this Custom Page.
  - Colour:
    - The Icon Colour.
- **Specify Actions that the User can perform on this Page**
  - User can Refresh the Page
    - Allows the User to Refresh the Page.
    - The following icon will appear at the bottom of the Page to allow refreshing:

- 

- User can Customise the Page
  - Allows the User to customise the Page, e.g., Widget layout and visibility and also Parameters.
  - The following icon will appear at the bottom of the Page to allow customisation:
    - 
- **Specify other Page options**
  - Show HTML Widget Headings?
    - Indicates whether to show a heading bar above the Widgets on this Page.
    - **NOTE:** Only certain Page Layouts (see the next section) use this.

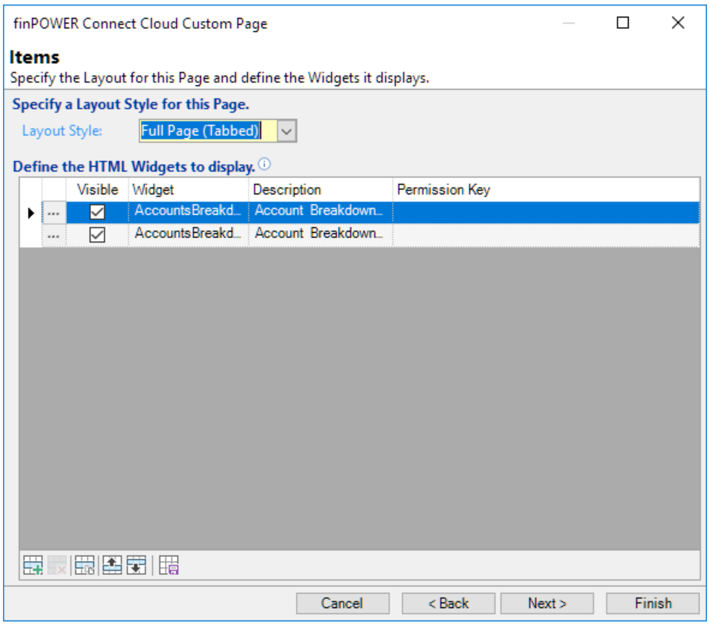
The following custom icons are available (this list may be added to over time):



Development Note: *This list is produced via gridPages_Preview in frmCloudConnectSettings.*

Items

This is where the Items displayed on the Page are defined.



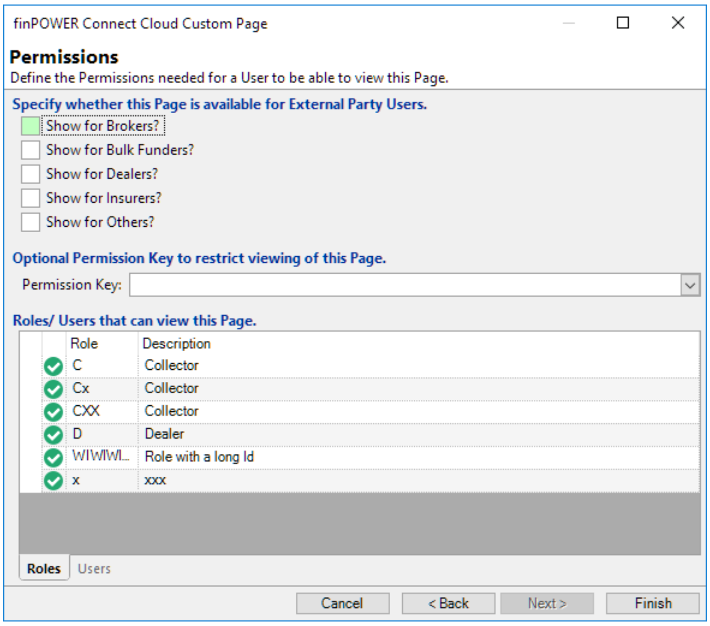
- **Specify a Layout Style for this Page**
  - Layout Style:
    - The style to use. One of:
      - Grid
        - Widgets will be laid out in a fixed grid
      - Blocks
        - Widgets will be laid out as a series of flowing blocks.
      - Full Page
        - Widget will occupy the entire page.
        - NOTE: Only the first Widget will ever be displayed.
      - Full Page (Tabbed)
        - Widgets will occupy the entire page but Tabs will be provided to switch between Widgets.
- **Define the HTML Widgets to display**
  - A grid of all Widgets and Group Headings to be displayed on the page.

The finPOWER Connect Cloud Page Item wizard is used to add and edit Page Items.

Permissions

Each Page can have a Permission Key defined to restrict certain Users from viewing it.

By default, no External Users can view a Custom Page. This can be changed via the series of checkboxes at the top of this page:



- **Specify whether this Page is available for External Party Users**
  - Show for Brokers?
    - Indicates whether Brokers will see this Page.
  - Show for Bulk Funders?
    - Indicates whether Bulk Funders will see this Page.
  - Show for Dealers?

    Indicates whether Dealers will see this Page.
  - Show for Insurers?

    Indicates whether Insurers will see this Page.
  - Show for Others?

    Indicates whether "Other" type External Users will see this Page.
- **Optional Permission Key to restrict viewing of this Page**
  - Permission Key:
    - A Permission Key to restrict which Users can view this Page

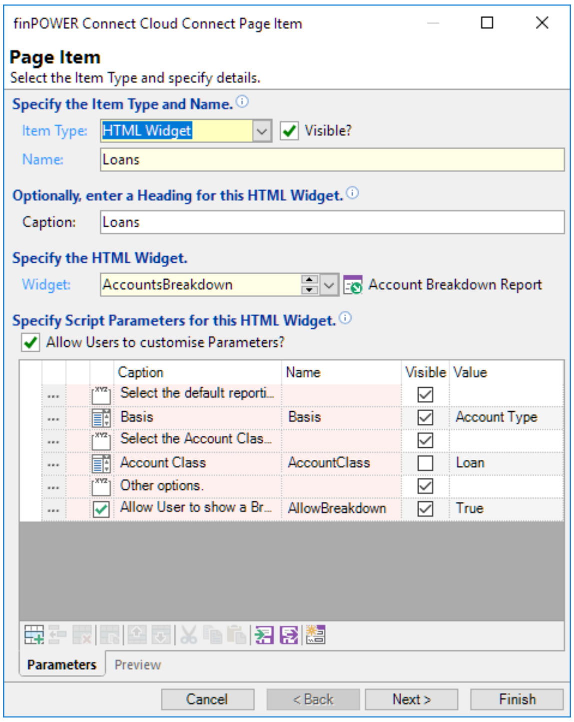
Page Item wizard

Pages can consist of both Widgets and Group Headings.

Group Headings are used to break Widgets up into groups. They are ignored for either of the "Full Page" type Layout Styles.

Page Item

This where the Page Item is configured and includes whether the Item can be customised by the User and what Parameters the User can change:



- **Specify the Item Type and Name**
  - Item Type:
    - Pages can display the types of Item:
      - External URL
      - HTML Widget
      - HTML Widget Script
      - Group Heading
  - Visible:
    - Indicates whether this Widget is Visible by default.
    - **NOTE:** Pages that can be customised by the User can hide certain Page Items by default, allowing the User to make them visible if required.
  - Name:
    - A unique Name to identify the Page Item.
    - **NOTE:** Use a short, meaningful name since this will be displayed to the User when they are customising the Page
- **Optionally, enter a Heading for this HTML Widget**
  - Caption:
    - This can be used to override the Caption defined on the HTML Widget Script.
- **Specify the HTML Widget**
  - Specify the system-supplied HTML Widget or an HTML Widget Script.

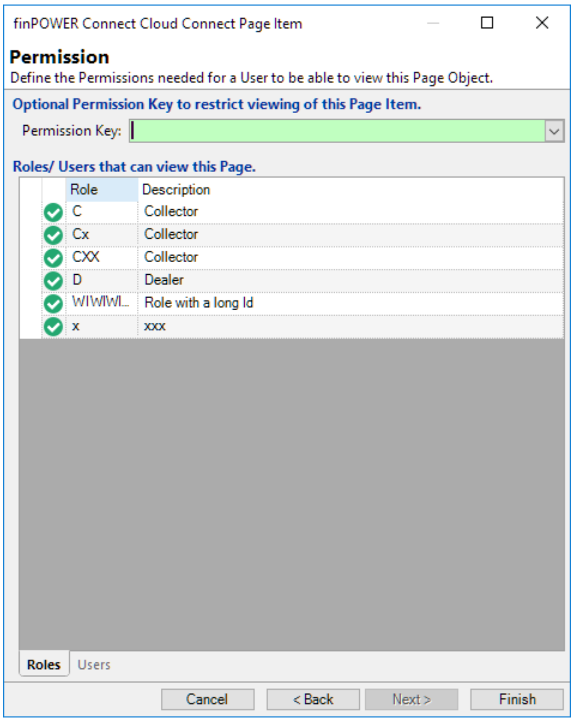
- **Specify Script Parameters for this HTML Widget**
  - **NOTE:** HTML Widget Scripts can define Parameters that can be used to customise the Script's functionality.
  - Allow Users to customise Parameters?
    - Indicates whether the User should be above to customise the Parameters.

A grid of Script Parameters is displayed. This is always empty to start with.

- Click the "Add all HTML Widget Parameters" button ( ) below the grid to add all of the Parameters defined on the Widget Script:
  - Defaults for Parameters can be added or overridden in the "Value" column.
  - Editing a Parameter and making it invisible means that the Parameter will still be used but the User will never see it or be able to modify it.

<u>Permission</u>

Each Page Item can have a Permission Key defined to restrict certain Users from viewing it:



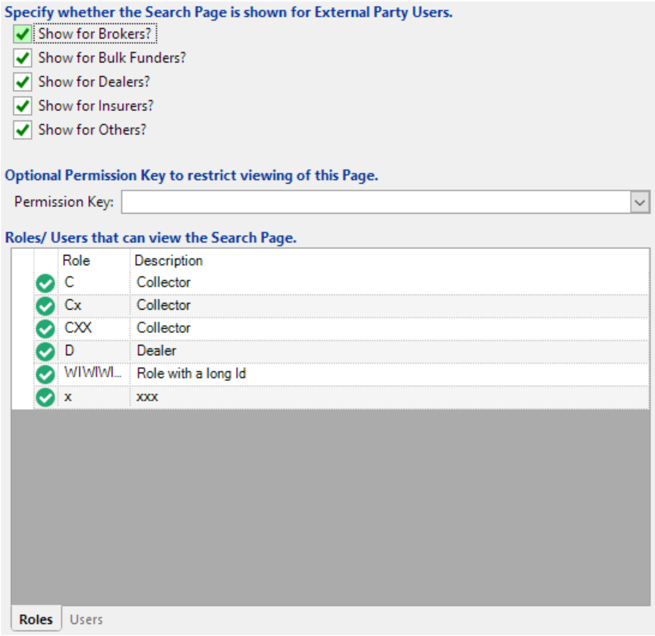
- **Optional Permission Key to restrict viewing of this Page Item**
  - Permission Key:
    - A Permission Key to restrict which Users can view this Page Item

Search (Settings)

Search Page

The search page is the main way of locating records such as Accounts and Clients.

However, you may not want certain Users to be able to see this page, e.g., you may want Dealer Users to not see the page since all searching or viewing of their data should be performed via custom pages.

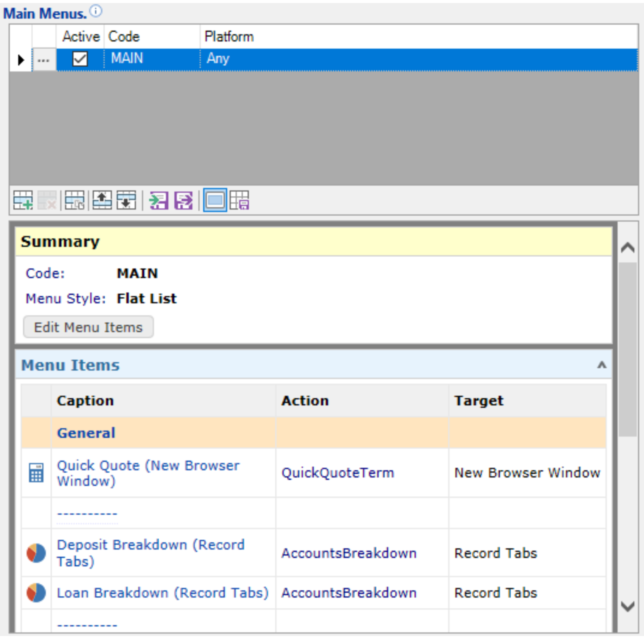


NOTE: By default, External Users cannot view the Search page. However, if granted permission to view the Search page, all searches will be filtered accordingly.

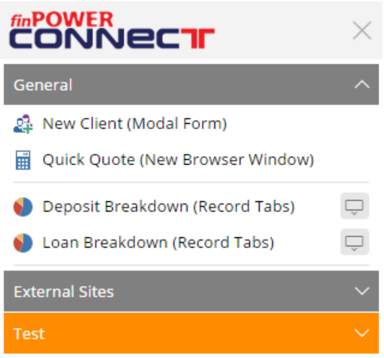
Menus (Settings)

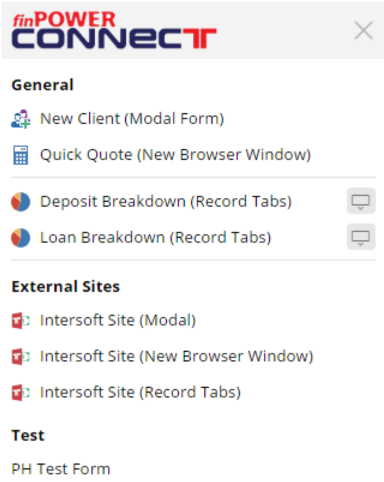
Main Menu

Main Menu customisations are made via the **Menus & Actions**, **Main Menu** page:



The Main Menu is accessed via the Menu button in top-left corner of the finPOWER Connect Cloud User Interface. It can be displayed with either "Collapsible Sub Menus" or as a "Flat List":





NOTE: The "Test" sub-menu represents how a system-based menu will appear. Currently there are no system-based main menu items though.

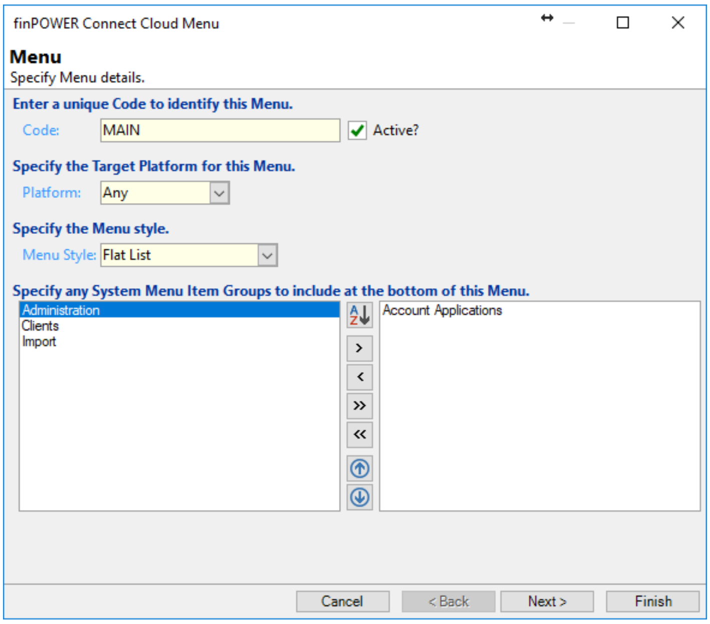
- Menus are added using the Add or Duplicate buttons below the grid.
- Only a single Main Menu will ever be displayed to a User.
    - This is based on the following (the list of Main Menus is visited top-down):

- Menu must be "Active".
- User must have permission to view the Menu.
  - This may be defined by a Permission Key or a list of valid External User types that can view the Menu.
- User's Platform (Desktop or Mobile) must match the Menu's Platform.

Homepages and Custom Pages are added and edited via the finPOWER Connect Cloud Page wizard.

Menu wizard

This allows entry of general Menu details, including the Menu Style.

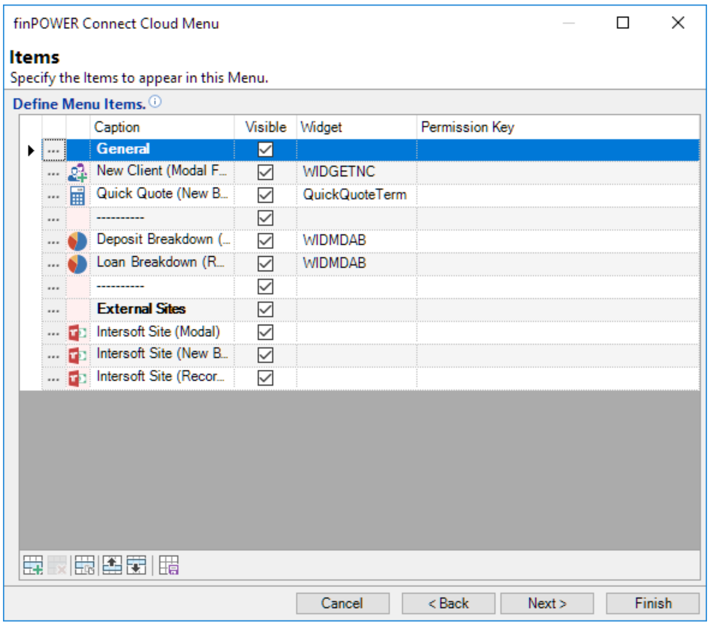


Menu

- **Enter a unique Code to identify this Menu**
  - Code
    - A unique code up to 25 characters long.
  - Active?
    - Inactive Menus will never be used.
- **Specify the Target Platform for this Menu**
  - Platform:
    - Determines whether this Menu is valid for Desktop, Mobile or both (Any).
- **Specify the Menu style**
  - Menu Style:
    - Defines the Menu Style.
- **Specify any System Menu Item Groups to include at the bottom of this Menu**
  - Moving items from the left to the right-hand list allows system-defined Menu Item Groups to be added to the bottom of the menu and ordered as required.

Items

This is where the Menu Items are defined:

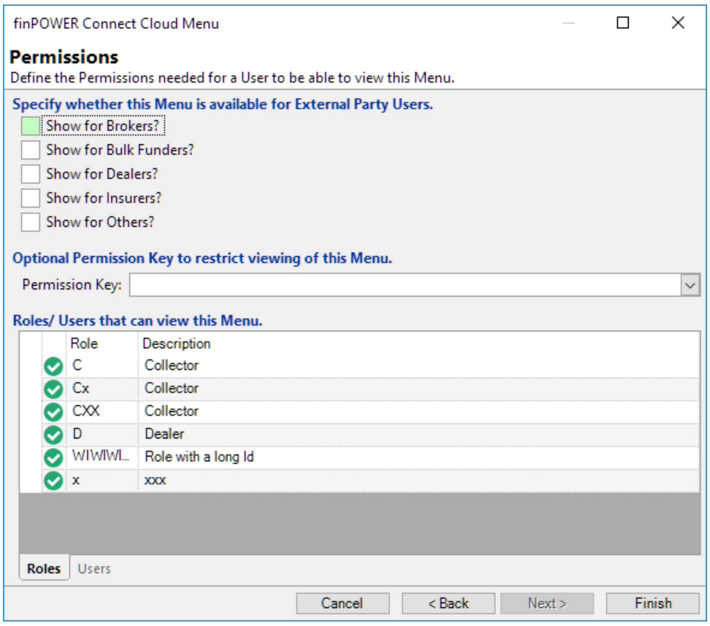


The finPOWER Connect Cloud [Menu Item wizard]() is used to add and edit Menu Items.

Permissions

Each Menu can have a Permission Key defined to restrict certain Users from viewing it.

By default, no External Users can view a Menu. This can be changed via the series of checkboxes at the top of this page:



- **Specify whether this Menu is available for External Party Users**
  - Show for Brokers?
    - Indicates whether Brokers will see this Menu.
  - Show for Bulk Funders?
    - Indicates whether Bulk Funders will see this Menu.
  - Show for Dealers?

    Indicates whether Dealers will see this Menu.

- Show for Insurers?

  Indicates whether Insurers will see this Menu.
- Show for Others?

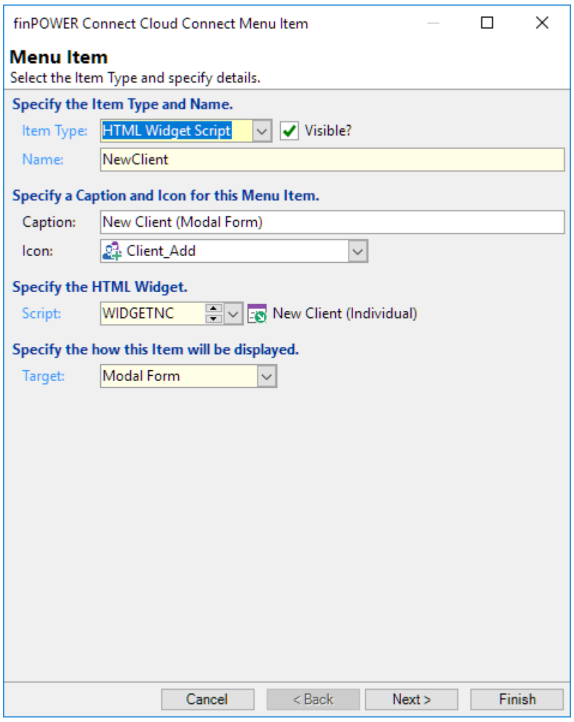
  Indicates whether "Other" type External Users will see this Menu.

- **Optional Permission Key to restrict viewing of this Menu**
  - Permission Key:
    - A Permission Key to restrict which Users can view this Menu.

Menu Item wizard

Menu Item

This where the Menu Item is configured and includes how the Menu Item will be displayed (the Target):

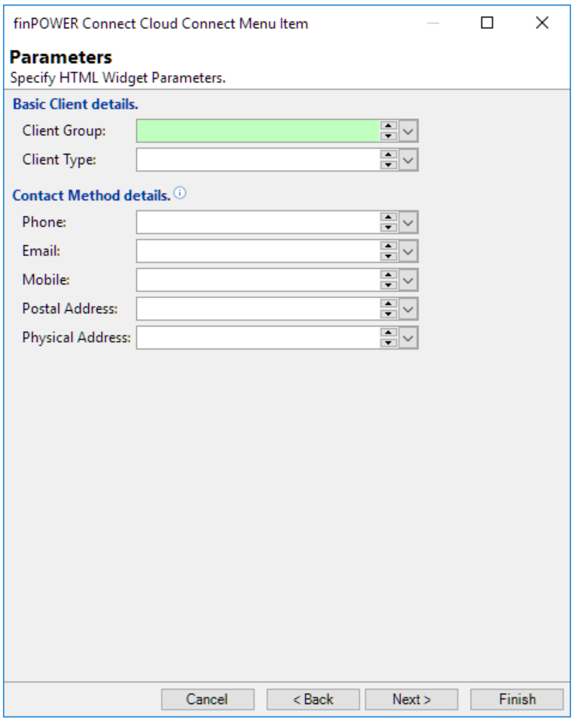


- **Specify the Item Type and Name**
    - Item Type:
        - Menu Items can be one of the following:
            - HTML Widget
            - HTML Widget Script
            - General Script
            - External URL
            - Group Heading
            - Separator
    - Visible:
        - Indicates whether this Item is Visible.
    - Name:
        - A unique Name to identify the Menu Item.
- **Specify a Caption and Icon for this Menu Item**
    - Caption:
        - This can be used to override the Caption defined on the HTML Widget Script.
    - Icon:
        - A finPOWER Connect Icon.
- **Specify the HTML Widget/ Script**
    - Specify the system-supplied HTML Widget or an HTML Widget or General Script.
- **Specify how this Item will be displayed**
    - Target:

- This defines how (or where) the Widget will be displayed:
  - Modal Form
  - Record Tabs
  - New Browser Window
- Allow multiple instances of Records Tabs to be opened?
  - This defined whether an item that targets "Record Tabs" can be opened multiple times.
    - If checked, an additional icon will appear on the right-hand side of the menu item in finPOWER Connect Cloud. Clicking this will always open a new instance of the menu item:

Parameters

This Page is only displayed if the selected HTML Widget on the previous wizard page has Parameters defined:

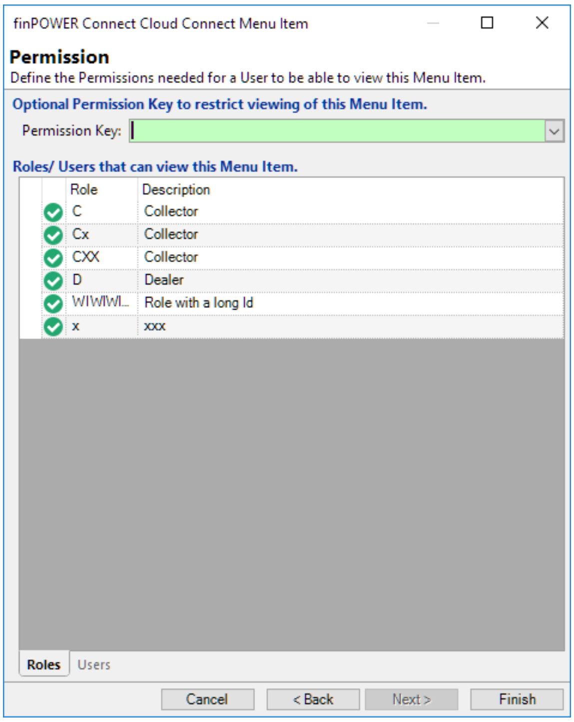


This page allows entry of the HTML Widget Scripts Parameters. It will not be displayed if the Script does not define any Parameters.

NOTE: This differs from the way that Parameters are entered for HTML Widget Page Items since there is no concept of a User being able to customise a Menu Item and therefore no need to make Parameters invisible.

Permission

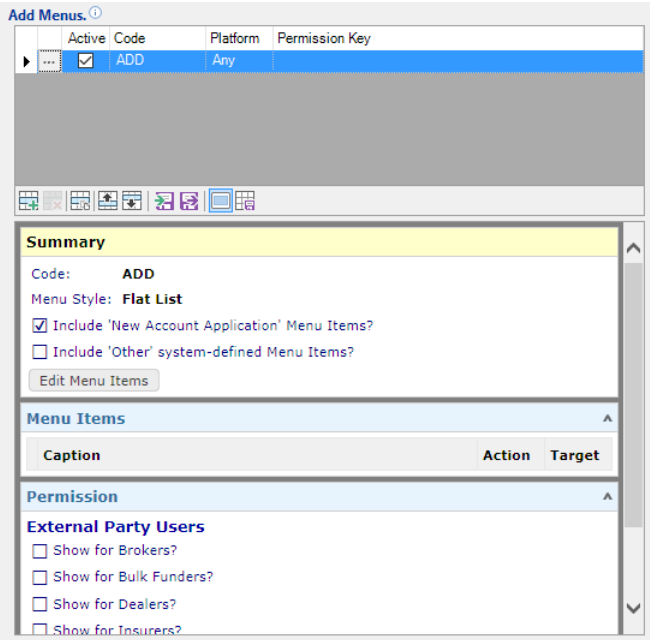
Each Menu Item can have a Permission Key defined to restrict certain Users from viewing it:



- **Optional Permission Key to restrict viewing of this Menu Item**
  - Permission Key:
    - A Permission Key to restrict which Users can view this Menu Item.

Add Menu

Add Menu customisations are made via the **Menus & Actions**, **Add Menu** page:



The Add Menu is accessed via the Plus button in top-right corner of the finPOWER Connect Cloud User Interface. It will only be displayed if an "Add" Menu is available for the current User.

Like the Main Menu, it can be displayed with either "Collapsible Sub Menus" or as a "Flat List".

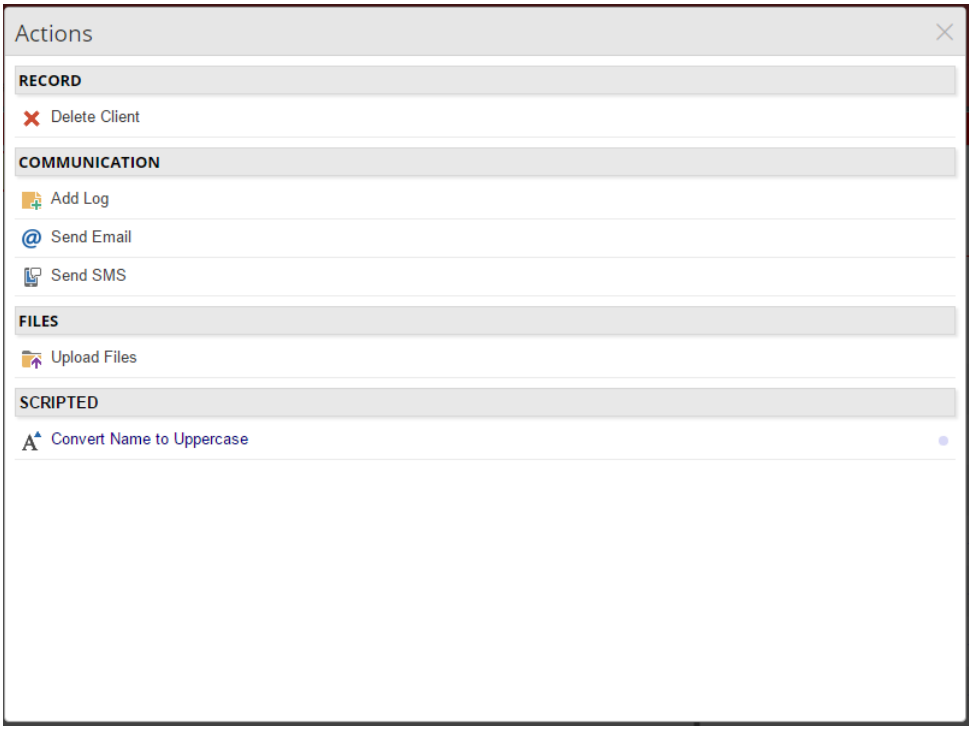
Forms & Actions (Settings)

Actions

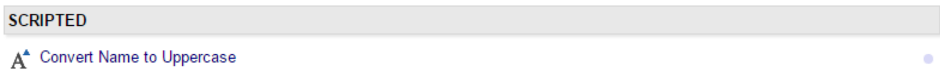
Each of the pages in this section allows a finPOWER Connect Cloud Actions Script to be defined.

Each record-form, e.g., Client has "Actions" that are viewed using the Actions button at the bottom of the form:

This displays a popup-form listing available Actions, e.g.:



By default, this list contains all system-defined Actions that the currently signed in User has permission to use. However, as you can see from the above screenshot, custom actions can be added:

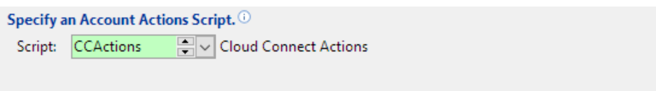


Customised Actions can be differentiated from system actions by their colour (navy blue rather than black) and the small circle icon that appears at the right-hand side of the action.

NOTE: Customised system-defined Actions will only be styled as custom Actions if their actual action is modified, e.g., they are customised to display an HTML Widget rather than perform their built-in action.

Changes to the Icon or Caption are not considered to be customisations worth differentiating.

Custom actions (and customisations to system-defined Actions and Pages) are made via various pages under **Menus & Actions** on the finPOWER Connect Cloud Configuration form.



Pages are available to customise Actions for each of the main record types:

- Accounts
- Account Applications
- Clients
- Security Statements
- Workflows

Each of these pages allows a Script to be defined to customise the corresponding form's Actions and Pages.

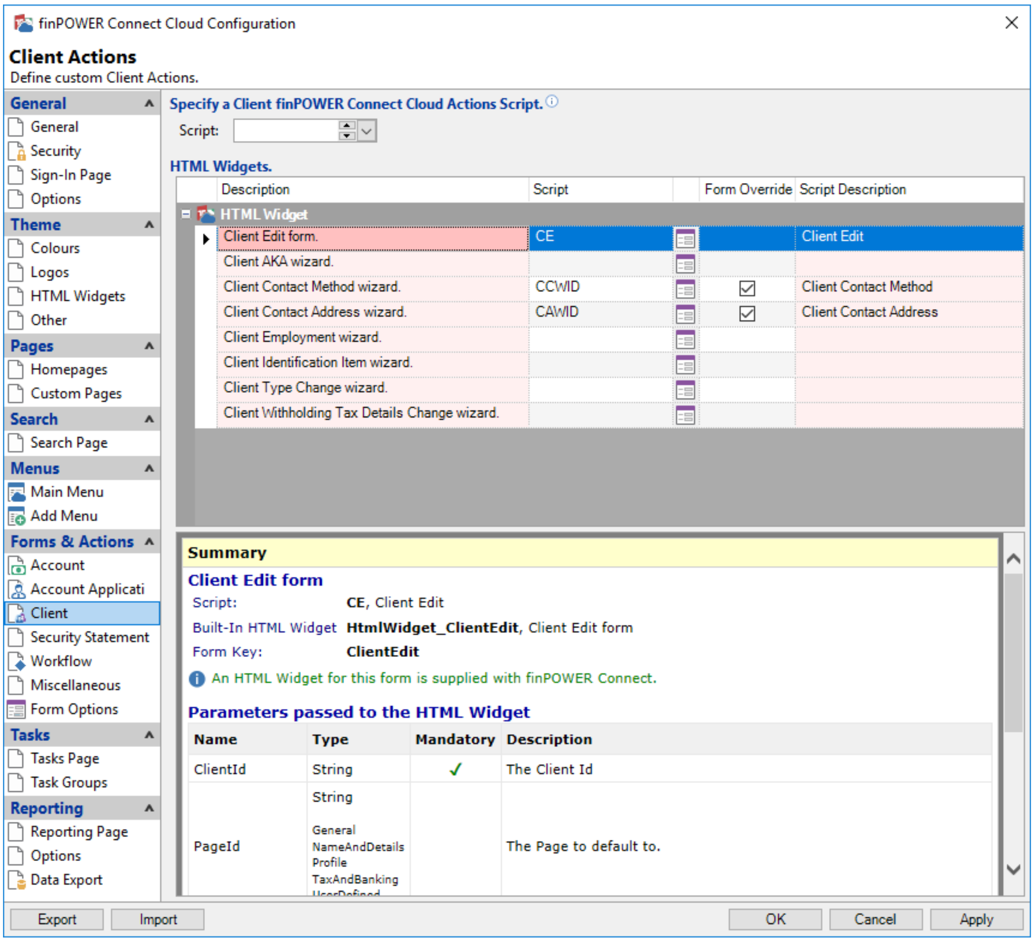
NOTE: The same Script can be used to customise all record types; there is no need to define five different Scripts.

Examples of Custom Action Scripts are given in the finPOWER Connect Cloud Actions Scripts section.

Just like most other customisation in finPOWER Connect Cloud, Custom Actions are implemented as HTML Widgets.

Forms

Each of the pages in this section has a grid displaying (and allowing you to override) the various forms available to this record type, e.g.:



Tasks (Settings)

Tasks Page

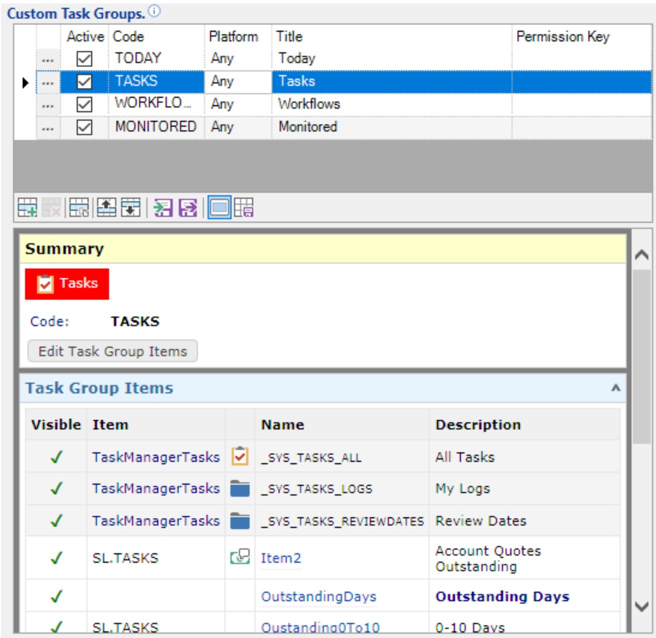
The Tasks page allows various types of tasks to be viewed.

However, you may not want certain Users to be able to see this page, e.g., you may want Dealer Users to not be able to see this page.

NOTE: By default, External Users cannot view the Tasks page.

Task Groups

The Tasks page displays multiple tabs, each of which represents a Task Group.



A Task Group can display system-defined and/ or custom Task Group Items.

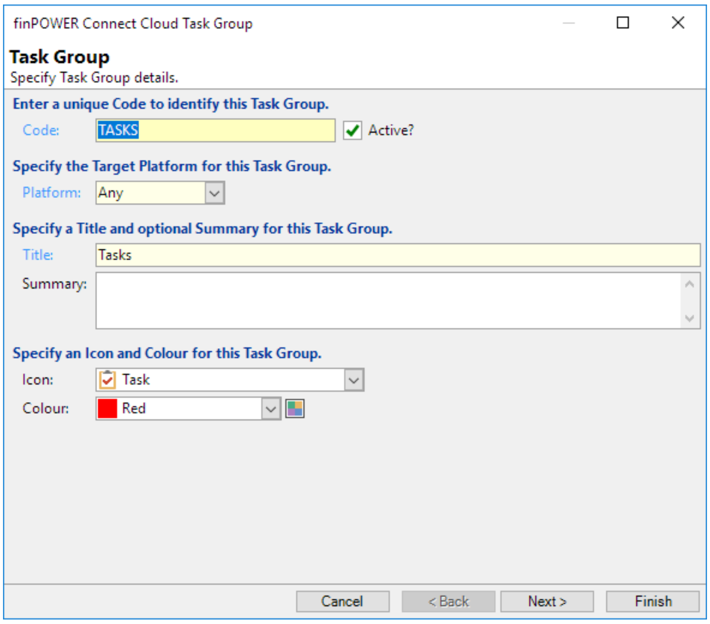
- Task Groups are added using the Add or Duplicate buttons below the grid.
  - The order of Task Groups can be changed using the Up and Down buttons.
- Each Task Group is represented by a Tab.
  - Tabs are displayed to a User based on the following:
    - Task Group must be "Active"
    - User must have permission to view the Task Group.
      - This may be defined by a Permission Key or a list of valid External User types that can view the Task Group.
    - User's Platform (Desktop or Mobile) must match the Task Group's Platform.

Task Groups are added and edited via the finPOWER Connect Cloud Task Group wizard.

Task Group wizard

<u>**Task Group**</u>

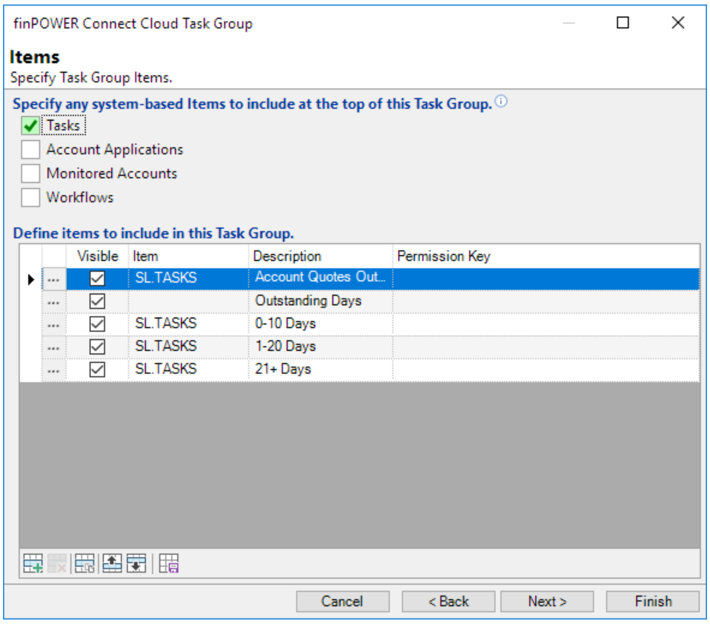
This allows entry of general Task Group details.



- **Enter a unique Code to identify this Task Group**
  - Code
    - A unique code up to 25 characters long.
    - **NOTE:** Codes must be unique.
  - Active?
    - Inactive Task Groups will never be displayed.
- **Specify the Target Platform for this Task Group**
  - Platform:
    - Determines whether this Task Group is valid for Desktop, Mobile or both (Any).
- **Specify a Title and optional Summary for this Task Group**
  - Title:
    - This should be short since it is used as the Task Group's Tab caption.
  - Summary:
    - This will typically be displayed when a Task Group is selected.
- **Specify an Icon and Colour for this Task Group**
  - Icon:
    - The Icon to display on this Task Group's Tab.
  - Colour:
    - The Tab Colour.

Items

This is where the Items displayed on the Task Group are defined.



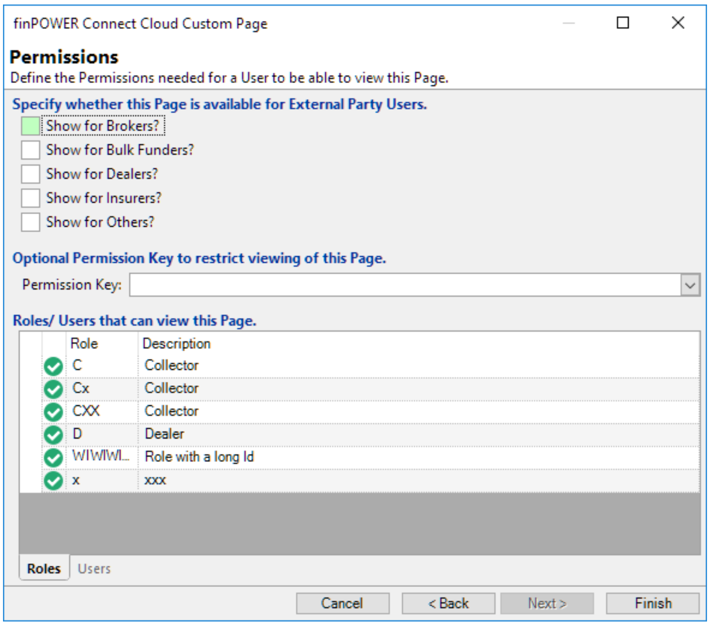
- **Specify any system-based Items to include at the top of this Task Group.**
  - Tasks:
    - Include system-defined Task (e.g., Logs and Review dates) type items.
  - Account Applications.
    - Include system-defined Account Application type items.
  - Monitored Accounts.
    - Include system-defined Monitored Account type items.
  - Workflows
    - Include system-defined Workflow type items.
- **Define items to include in this Task Group.**
  - A grid of all custom items to be displayed for this Task Group.

The finPOWER Connect Cloud Task Group Item wizard is used to add and edit Page Items.

Permissions

Each Page can have a Permission Key defined to restrict certain Users from viewing it.

By default, no External Users can view a Custom Page. This can be changed via the series of checkboxes at the top of this page:



- **Specify whether this Page is available for External Party Users**
  - Show for Brokers?
    - Indicates whether Brokers will see this Page.
  - Show for Bulk Funders?
    - Indicates whether Bulk Funders will see this Page.
  - Show for Dealers?

    Indicates whether Dealers will see this Page.
  - Show for Insurers?

    Indicates whether Insurers will see this Page.
  - Show for Others?

    Indicates whether "Other" type External Users will see this Page.
- **Optional Permission Key to restrict viewing of this Page**
  - Permission Key:
    - A Permission Key to restrict which Users can view this Page

finPOWER Connect Cloud Actions Scripts

An Actions Script can be defined in multiple locations, e.g.:

- Theme, Other
  - E.g., to change the theme based upon the sign-in User (or the URL if on the sign-in page)
- Menus & Actions, Account Actions
  - E.g., change page order or add custom actions to the Acount form

NOTE: The same Script can be configured in each of these locations or you may choose to specify different Scripts.

Record Forms

This Script allows customisation to record pages such as the Client form to be made.

For the Actions Script to be called, it must be configured on the relevant page, e.g., the Menus & Actions, Client Actions page:

Customisations that can be made include:

- Modifying Actions, e.g.:
  - Making a system-defined Action unavailable.
  - Changing the caption or icon of a system-defined Action.
  - Adding custom Actions in the form of HTML Widgets.
- Modifying Pages, e.g.:
  - Making a Page unavailable.
  - Making a Page invisible (so it will not be displayed by default; the User will need to click an icon to show all pages).
  - Changing the Caption or Bullet Text of a Page.
  - Moving Pages around.

The following sample Script shows how to make system-defined Actions unavailable, override the functionality of system-defined Actions and add custom Actions:

```
Public Function Main(source As Object,
                     headerInfo As finCloudConnectFormHeaderInfo,
                     requestInfo As finScriptRequestInfo) As Boolean

  ' Assume Success
  Main = True

  ' Upadte Actions
  UpdateActions_Client(DirectCast(source, finClient), headerInfo.Actions, requestInfo)

  ' Tweak General Page
  headerInfo.Pages.SetBulletText("General", "!")
  headerInfo.Pages.SetCaption("General", "Basic")

End Function

Private Sub UpdateActions_Client(client As finClient,
                                 actions As finCloudConnectFormHeaderInfoActions,
                                 requestInfo As finScriptRequestInfo)
```

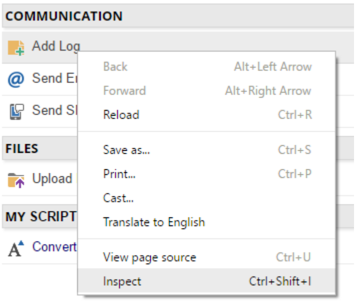
```
  ' Make existing System-defined Actions unavailable
  'actions.SetAvailable("Delete", False, True)

  ' Override existing System-defined Action
  With actions.ItemByActionId("SendEmail", True)
    .Icon = "Email|Script" ' Email icon with Script overlay
    .Caption = "Send Email (Custom)"
    .SetApplicationShortcutUrlForHtmlWidgetScript("WIDGETCUC", "", 320, 320, Nothing)
  End With

  ' Add new Actions
  actions.AddGroupId = "My Scripted Actions"
  actions.AddHtmlWidgetScript("ConvertName", "Convert Name to Uppercase", "Font_Increase",
"WIDGETCUC", "", 280, 100)

End Sub
```

Determining the Action Id of System-Defined Actions

When making system-defined Actions unavailable or overriding their functionality, you need to first know the Action Id of the system-defined Action.

The Action Id is added as a special HTML attribute in the Actions list. To view it, do the following (example uses Google Chrome):

1. Right-click on the Action and select **Inspect**, e.g.:



2. Look for the fincc_actionid attribute. The value is the Action Id, e.g.:

```
<li class="action system">
▼<button> == $0
    <img src="/finC/fincwsProxy.ashx?Icon/GetIcon?icon=Log_Add&size=16&overlay=">
    <span fincc_actionid="CreateLog">Add Log</span>
  </button>
</li>
```

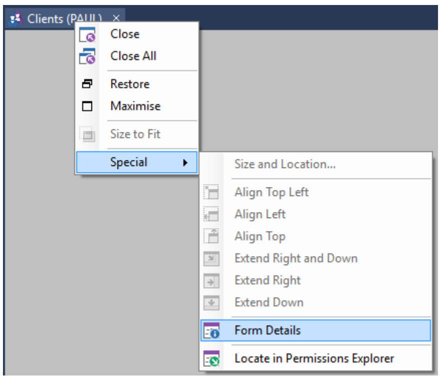
Determining the Page Id of System-Defined Pages

When making system-defined Pages unavailable or overriding their properties, you need to first know the Page Id of the system-defined Page.

Page Ids in finPOWER Connect Cloud are named the same as their counterparts in the desktop version of finPOWER Connect.

Therefore, to discover the Page Ids for the Client form, do the following:

1. Open the Clients form in finPOWER Connect desktop.
2. Right-click on the Form Tab and do: **Special**, **Form Details**, e.g.:



3. The **Pages** section in the generated report lists the Page Ids, e.g.:

Pages

Caption	Page Id	Visible	Enabled
General	General	✓	✓
Name & Details	Details	✓	✓
Profile	Profile	✓	✓
Contacts	Contacts	✓	✓
Employment	Employments	✓	✓

NOTE: Summary Pages in finPOWER Connect Cloud have Page Ids named **SummaryPage_*ScriptId***, i.e., they do not follow the same format as finPOWER Connect Desktop.

Examples

Re-Ordering and Hiding Low Priority Pages

Certain companies (or Users) may prioritise certain record pages, e.g., they may hardly ever use the Clients, Tax & Banking page.

You may also wish to re-order the pages to better suit the User's workflow.

Pages can be hidden by default by setting the Page object's `Visible` property to False. This then displays a special icon to the right of the Tabs allowing hidden pages to be toggled on and off, e.g.:

```
Public Function Main(source As Object,
                     headerInfo As finCloudConnectFormHeaderInfo,
                     requestInfo As finScriptRequestInfo) As Boolean

  Dim Page As finCloudConnectFormHeaderInfoPage

  ' Assume Success
  Main = True


  ' Hide all but high-priority Pages
  For Each Page In headerInfo.Pages
    With Page
      If Len(.SummaryPageScriptId) = 0 Then
        Select Case .PageId
          Case "General", "Accounts", "Logs"
          Case Else
            ' Hide
            .Visible = False
        End Select
      Else
        ' Ignore Summary Pages
      End If
    End With
  Next

End Function
```

This hides all but the General, Accounts and Logs pages but leaves Summary Pages intact, e.g.:

The helper method `SetPageOrder` provides a much simpler way for pages to be re-ordered and hidden, e.g.:

```
Public Function Main(source As Object,
                     headerInfo As finCloudConnectFormHeaderInfo,
                     requestInfo As finScriptRequestInfo) As Boolean

  ' Assume Success
  Main = True

  ' Set Page Order and Visibility
  headerInfo.Pages.SetPageOrder("Logs,General,SummaryPage_SP.CLIKEY", False, True)

End Function
```

This hides all but the Logs and General pages but also moves the "Key Details" Summary Page to after these pages, e.g.:


JS: Smith, John Nigel
Individual.
Logs
General
Key Details
»

HTML Widgets as Custom Actions

As shown in the previous section, HTML Widgets can be used as custom actions for records.

Custom Action HTML Widget Example

The following example HTML Widget Script will change the name of a Client to be uppercase.

NOTE: HTML Widgets being used as Custom Actions will always be passed a special startup parameter which is the id of the record from which the Custom Action has been launched.

In the example below, a special `clientId` parameter is available to the Widget.

Points of note in this example (also highlighted in the Script Code and Template Text):

- The HTML Widget Script is passed a startup parameter of "clientId".
  - **NOTE:** This example follows our standard HTML Widget Script code in that it provides a `mCombinedParameters` object containing a union of startup parameters and parameters supplied to the current event.
- The JavaScript code in the Template Text calls the `widget.RefreshParent()` method to update the Client form before closing the Widget.

Script Code

```
Option Explicit On
Option Strict On

' Objects
Private mCombinedParameters As ISKeyValueList
Private mParameters As ISKeyValueList
Private mStartupParameters As ISKeyValueList

Public Function Main(eventId As String,
                     parametersJson As String,
                     startUpParametersJson As String,
                     hostingContext As isefinHtmlWidgetHostingContext,
                     requestInfo As finScriptRequestInfo,
                     ByRef returnValue As String) As Boolean

  ' Assume Success
  Main = True

  ' Get Parameters
  mParameters = finBL.CreateKeyValueList()
  mParameters.FromSimpleJsonString(parametersJson)
  mStartupParameters = finBL.CreateKeyValueList()
  mStartupParameters.FromSimpleJsonString(startUpParametersJson)

  ' Get Combined Parameters (Startup Parameters updated with event Parameters)
  mCombinedParameters = mStartupParameters.Clone()
  mCombinedParameters.UpdateFromKeyValueList(mParameters, True)

  ' Handle Events
  Select Case eventId
    Case ""
      ' Return initial HTML content
      returnValue = ScriptInfo.TemplateText

    Case "Execute"
      ' Execute
      Main = Execute(parametersJson, returnValue)
  End Select

End Function

Private Function Execute(parametersJson As String,
                         ByRef returnValue As String) As Boolean

  Dim Client As finClient
  Dim ClientId As String
```

```
  Dim Success As Boolean

  ' Assume Success
  Success = True

  ' Get Parameters
  ClientId = mCombinedParameters.GetString("ClientId")

  ' Validate
  If Len(ClientId) = 0 Then
    Success = False
    finBL.Error.ErrorBegin("ClientId not specified.")
  End If

  ' Load Client
  If Success Then
    Client = finBL.CreateClient()
    Success = Client.Load(ClientId)
  End If

  ' Update and Save Client
  If Success Then
    Client.Name = UCase(Client.Name)
    Client.FirstName = UCase(Client.FirstName)
    Client.MiddleNames = UCase(Client.MiddleNames)
    Client.LastName = UCase(Client.LastName)

    If Client.Save() Then
      returnValue = Client.Name
    Else
      Success = False
    End If
  End If

  Return Success

End Function
```

Template Text

```
<div id="frmMain" class="is-widget-content" style="text-align:center">

  <button id="cmdExecute" class="ok">Convert Client Name to Uppercase</button>

</div>


<script>
// Initialise
$(function () {
  // Handle Buttons
  $("#cmdExecute").click(Execute);
});

// =======
// Execute
// =======
function Execute() {
  // Confirm
  if (!window.confirm("Convert Client Name to Uppercase?")) return;

  // Execute
  widget.GetString("Execute", {}, Execute_Done, Execute_Fail);
}

function Execute_Done(data) {
  // Refresh parent form
  widget.RefreshParent();

  // Notify
  window.alert("Client Name updated to '" + data + "'.");

  // Close
  widget.Close();
}

function Execute_Fail(errorMessage) {
  window.alert(errorMessage);
}
```

```
</script>
```

WebUI Application Shortcuts

A special type of Application Shortcut is available to finPOWER Connect Cloud. These are WebUI type shortcuts and allow Scripts and hyperlinks to make changes to the User Interface.

The parameters for this type of Application Shortcut can be changed together, e.g.:

```
app://WebUI?view=Home&sideBarVisible=false
```

View

Application Shortcuts can be used to switch between any of the Main Views, e.g.:

```
app://WebUI?view=Home
```

Supported values for the view parameter are:

- Home
- Processes
- Records
- Search
- Tasks
- Reporting

In addition to the Main View name, the following can also be specified for certain views:

Processes

- `runManualProcessId`
    - Run a Manual Process
- `selectManualProcessId`
    - Select a Manual Process

SideBarVisible

Application Shortcuts can be used to hide or show the side bar (the list of main view icons which generally appears to the side but which may appear at the bottom of the screen on mobile devices), e.g.:

```
app://WebUI?sideBarVisible=false
```