



CM - QUICK START GUIDE

Version 1.3

www.infinityecm.com

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GETTING STARTED

Welcome to the Infinity ECM - Cloud Quick Start Guide.

With this Quick Start Guide and online instructions under the Documentation - Cloud section of the system's user menu, the Infinity ECM platform will be easy to use.

In this guide, you can expect detailed instructions for setting up an account: from editing the user data, preparing settings and options, defining overview to getting started with Infinity ECM - Cloud.

The process of using Infinity ECM – Cloud portal, begins after you have received the user login information inside the e-mail (Figure 1). User receives email with login information for CM portal where he can manage all subscription data, and login information for Infinity ECM platform.

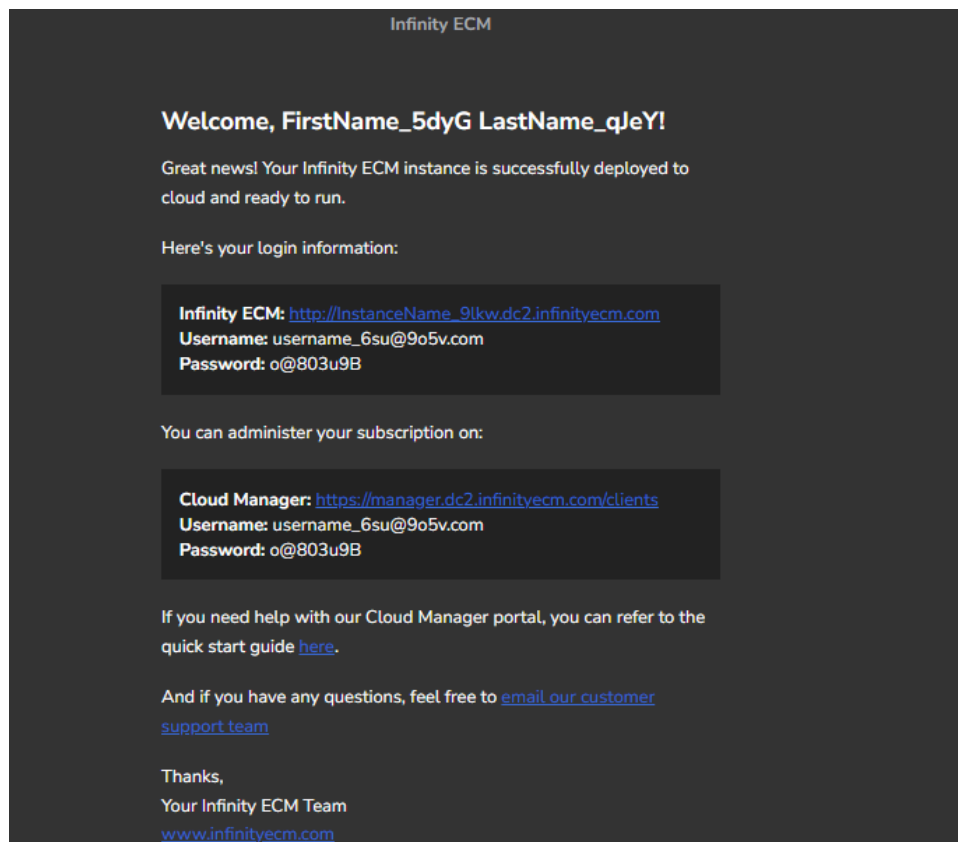
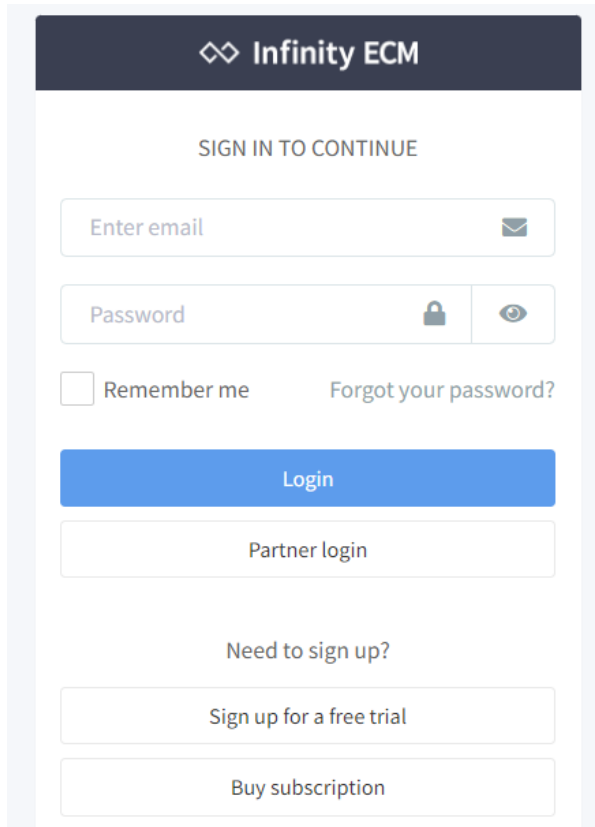


Figure 1. E-mail with login information

Inside the e-mail, there is also a link to the user documentation that you always have available.

1. USER LOGIN

The beginning of use starts with logging in to the Infinity ECM - Cloud portal (Figure 2.) with the information received in the e-mail (username and password). After successfully logging in to the Infinity ECM - Cloud user portal, you can start using the services on the portal.



The screenshot shows the user login interface for the Infinity ECM portal. At the top, there is a dark header with the Infinity ECM logo and name. Below the header, the text "SIGN IN TO CONTINUE" is centered. The form contains an email input field with a placeholder "Enter email" and an envelope icon. Below that is a password input field with a placeholder "Password", a lock icon, and an eye icon. There is a checkbox for "Remember me" and a link for "Forgot your password?". A prominent blue "Login" button is centered below the password field. Underneath the "Login" button is a "Partner login" button. At the bottom of the form, there are three buttons: "Need to sign up?", "Sign up for a free trial", and "Buy subscription".

Figure 2. User login

When the user starts the portal for the first time, it is not needed to configure the settings. All you have to do is check and update the user data.

2. Setting up user data

User data can be accessed by clicking on the user icon in the upper right corner, after which a drop-down menu with options opens (Figure 3). The user can change data related to the company (**Company profile**) and data related to the logged user (**My profile**).

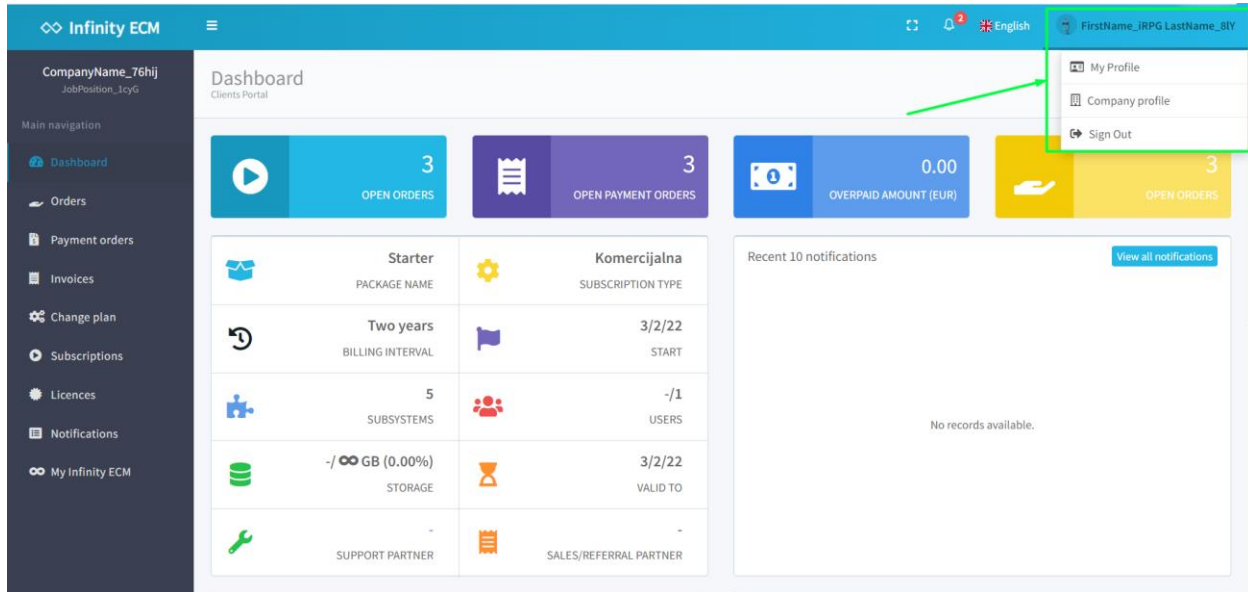


Figure 3. User data

Company data is divided into several sections:

- Company details – general company data.
- Address – enter the primary address of the company and enter the address to which the billing information will be sent.
- Administrators – a list of users who have administrator rights.
- Credit cards – credit card overview.
- Company roles – an overview of the roles the user has entered. Depending on the entered roles, the user has the appropriate rights and powers over the data.
- My partners – overview of company partners.
- Support – an overview of companies offering support.
- Company logo – setting up company logo.
- Email logs – list of emails that are sent from CM sistem.

Company profile

My profile data

Personal Settings

- Company info**
- Addresses
- Administrators
- Credit cards
- Security roles
- My Partners
- Support
- Company logo

Company info

Name
CompanyName_76hij

Support partner
Info Novitas Ltd.

Company VAT/TAX ID

Employees number

Email

Telephone

Mobile phone

Telefax

Web URL

Figure 4. User data – Company profile

The data on the registered user is divided into the following sections:

- Profile – general user data.
- Account settings – it is possible to change the password of the logged in user.

My Profile
My profile data

| | | |
|--------------------------|---|---|
| Personal Settings | Profile | |
| Profile | First name | Last name |
| Account settings | <input type="text" value="FirstName_IRPG"/> | <input type="text" value="LastName_8LY"/> |
| | Username | Company |
| | <input type="text" value="username_qm8@vnf.com"/> | <input type="text" value="CompanyName_76hij"/> |
| | Job position | Business email address |
| | <input type="text" value="JobPosition_1cyG"/> | <input type="text" value="businessemail_2ns9@rrsas.com"/> |
| | Telephone | Mobile phone |
| | <input type="text" value="+385 1 2345 678"/> | <input type="text" value="+385 1 2345 678"/> |
| | Language | Culture |
| | <input type="text" value="English"/> | <input type="text" value="English (en)"/> |
| | Timezone | |
| | <input type="text" value="(UTC) Coordinated Universal Time"/> | |
| | <input type="button" value="Update"/> | |

Figure 5. User profile – My profile

3. Main dashboard

After successfully setting up the user data, the user can start using the portal.

3.1. Dashboard overview

In the left corner there is a main navigation menu (1) through which the user can directly see his orders, payment orders, invoices, subscriptions, notifications and plan change options. The header contains options with notifications (3), language change option (4), menu for accessing user data and the log off option (5).

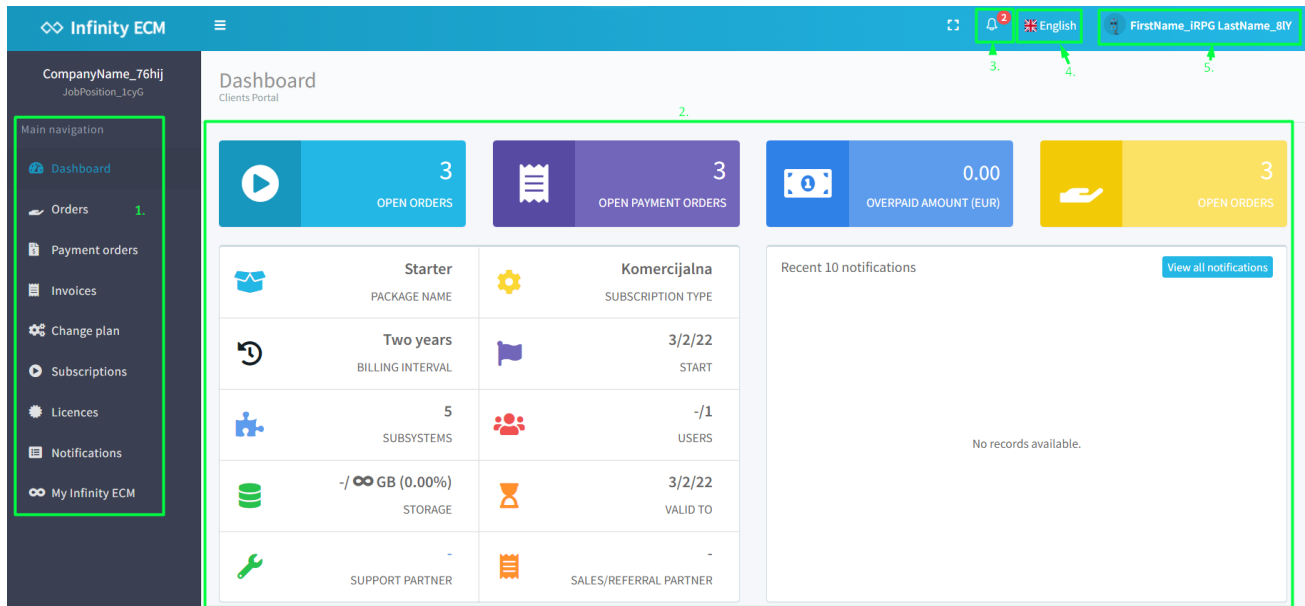


Figure 6. Dashboard and toolbars

Dashboard contains widgets (2) that show the current status of the logged in users portal data (Figure 6.)

Return to the main dashboard is enabled by clicking on the **Dashboard** option in the menu on the left upper side or by clicking on the **Infinity ECM logo** in the upper left corner of the screen (Figure 7).

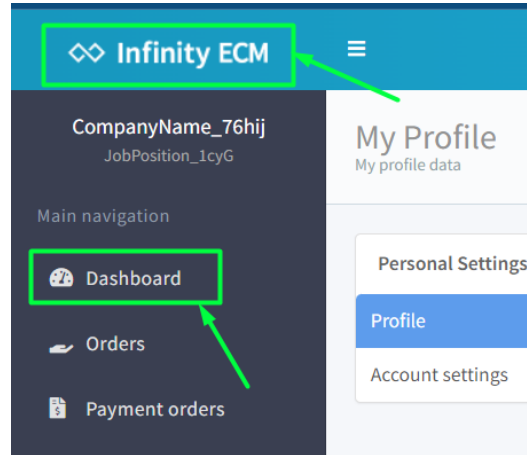


Figure 7. Returning to main dashboard

3.2. Overview settings

This section will explain the available options related to table overview. Table overview has different options depending on the rights and authorities of the logged user.

The overviews are accessed via the navigation sidebar. If the user wants to view all invoices, he needs to select Invoices on navigation sidebar, if the user wants to view the payment orders he needs to select the Payment orders option on the sidebar on the menu.

The overview contains following options:

1. Column filter - selecting the filter option, it opens the filtering row.
2. Items per page - change the number of items per page.
3. Refresh - overview refresh.
4. Context menu - available options: profile, edit, delete item. Each row contains additional options (depending on the rights of the logged in user). They can be opened by clicking on the three dots (...) at the end of the row.

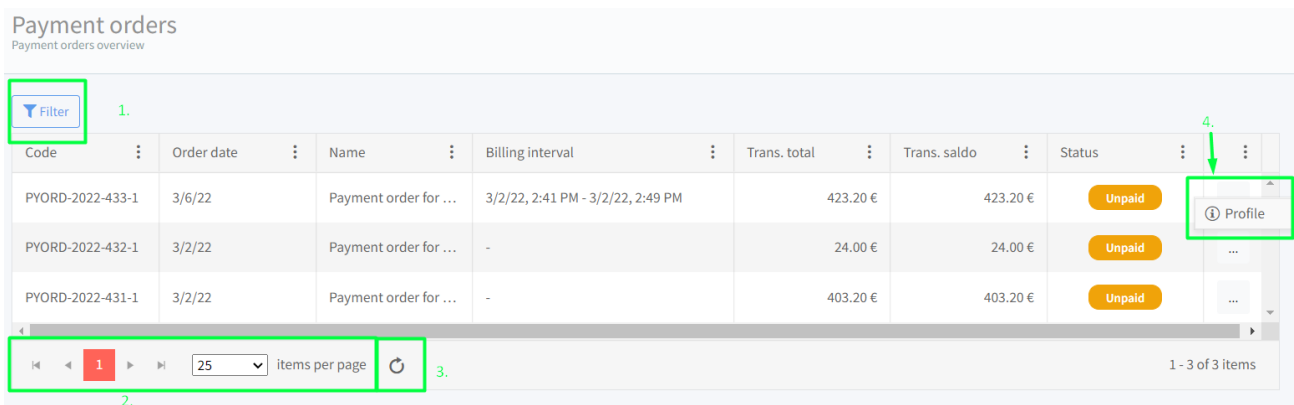
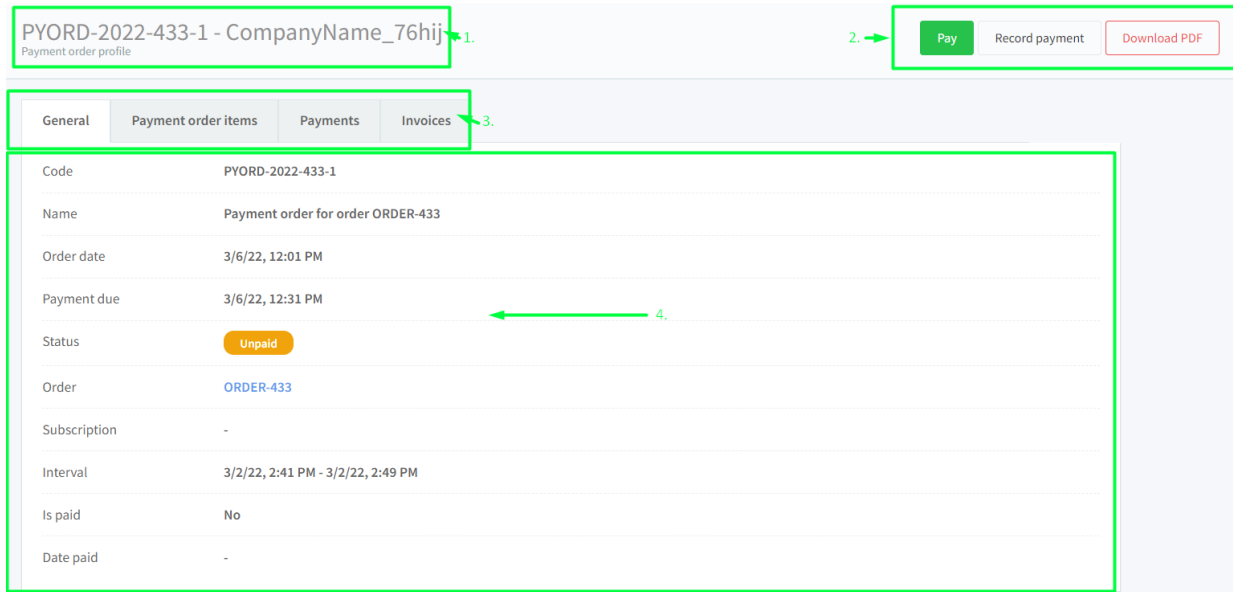


Figure 8. Overview settings

3.3. Entity profile

By double-clicking an individual row in the view, or selecting **Profile** at the end of the line in the view, the entity profile opens. The profile contains information and options related to that entity.

Each profile has its name (1) in the upper left corner, options (2) in the upper right corner, data that is grouped and displayed by tabs (3) and the general part of profile(4) where details and data are displayed.



The screenshot shows the 'Entity profile' for 'PYORD-2022-433-1 - CompanyName_76hij'. The header includes the entity name (1) and action buttons: 'Pay', 'Record payment', and 'Download PDF' (2). Below the header is a tabbed menu (3) with 'General', 'Payment order items', 'Payments', and 'Invoices'. The main content area (4) displays the following details:

| | |
|--------------|-----------------------------------|
| Code | PYORD-2022-433-1 |
| Name | Payment order for order ORDER-433 |
| Order date | 3/6/22, 12:01 PM |
| Payment due | 3/6/22, 12:31 PM |
| Status | Unpaid |
| Order | ORDER-433 |
| Subscription | - |
| Interval | 3/2/22, 2:41 PM - 3/2/22, 2:49 PM |
| Is paid | No |
| Date paid | - |

Figure 9. Entity profile

4. SUBSCRIPTION CHANGE

The user can change the currently activated subscription at any time. Clicking on the **Change Plan** option in the user menu on the left, opens the current subscription profile.

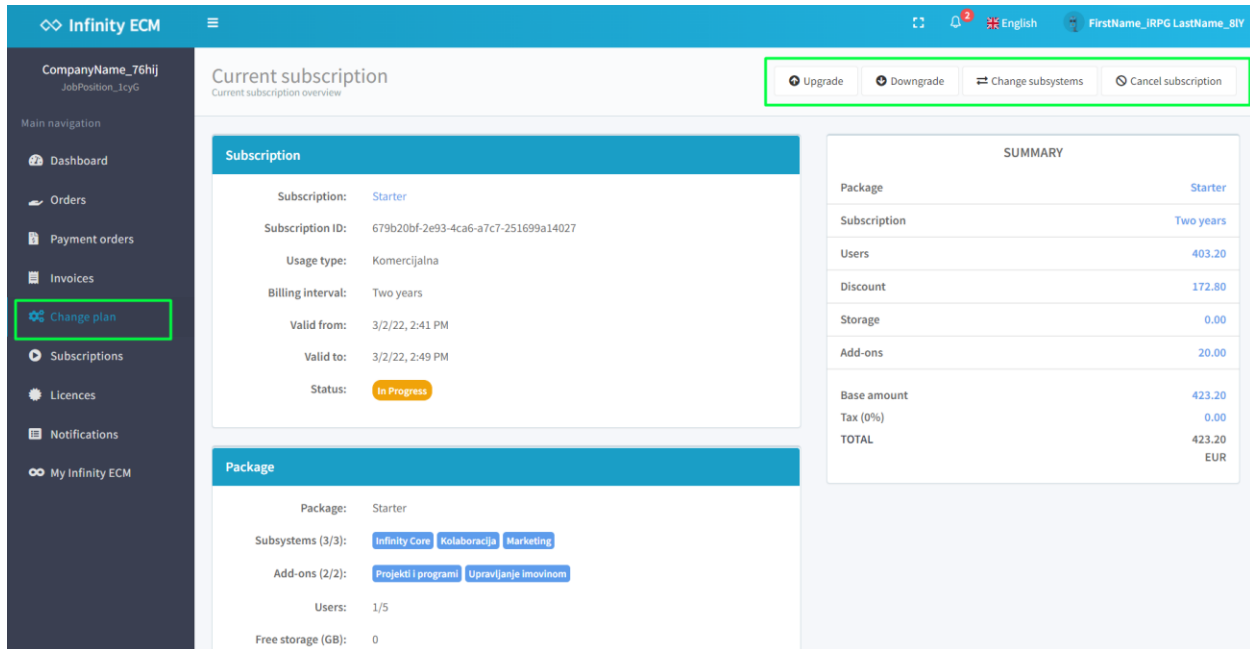


Figure 10. Current subscription

The user has the following options:

- **Buy subscription** - opens for a new form (Figure 11) to purchase a new subscription. You can choose the package, billing interval, storage (GB), subsystems and payment method. If the user has an active commercial subscription, then the following options are displayed:
 - **Upgrade** - upgrade to a higher level subscription. The higher-level subscription has a larger number of activated modules and additional options enabled.
 - **Downgrade** - switch to a lower level subscription. The lower level subscription has a smaller number of activated modules and additional options enabled.
 - **Change subsystem** - option to change activated subsystems if possible.
- **Cancel subscription** - the option to unsubscribe opens (Figure 12). The current subscription is canceled and depending on the options of the currently activated subscription, the retention period is started where the user can reactivate the old subscription or start a new subscription.

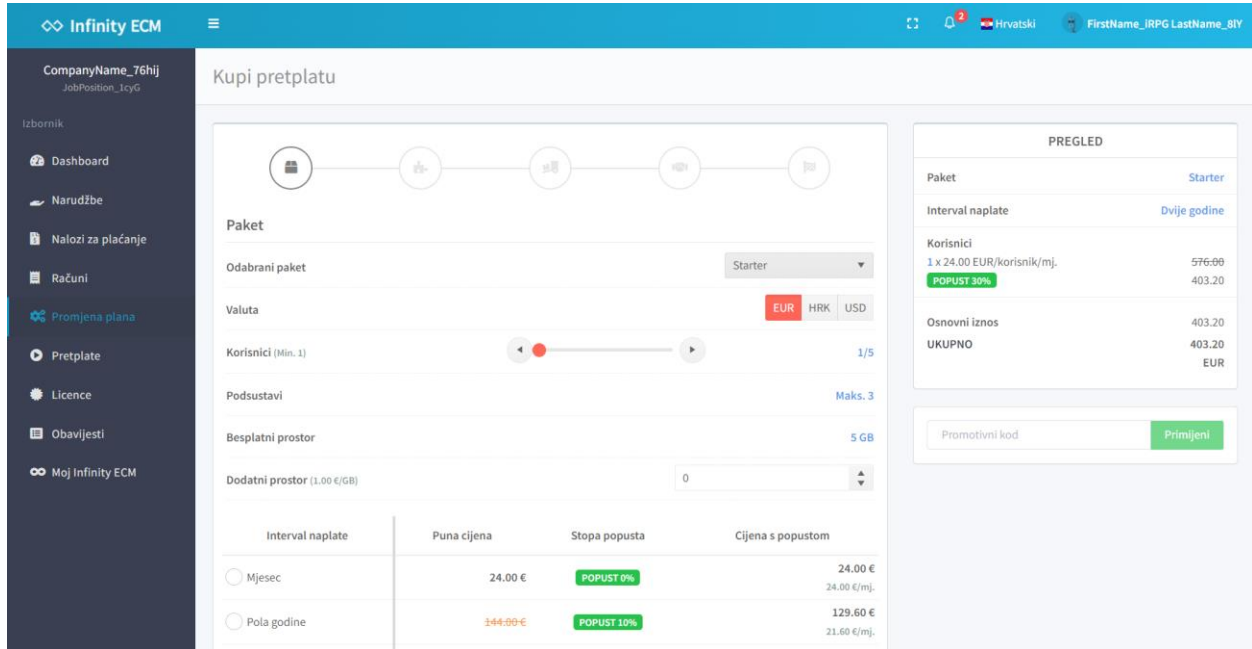


Figure 11. Buying new subscription

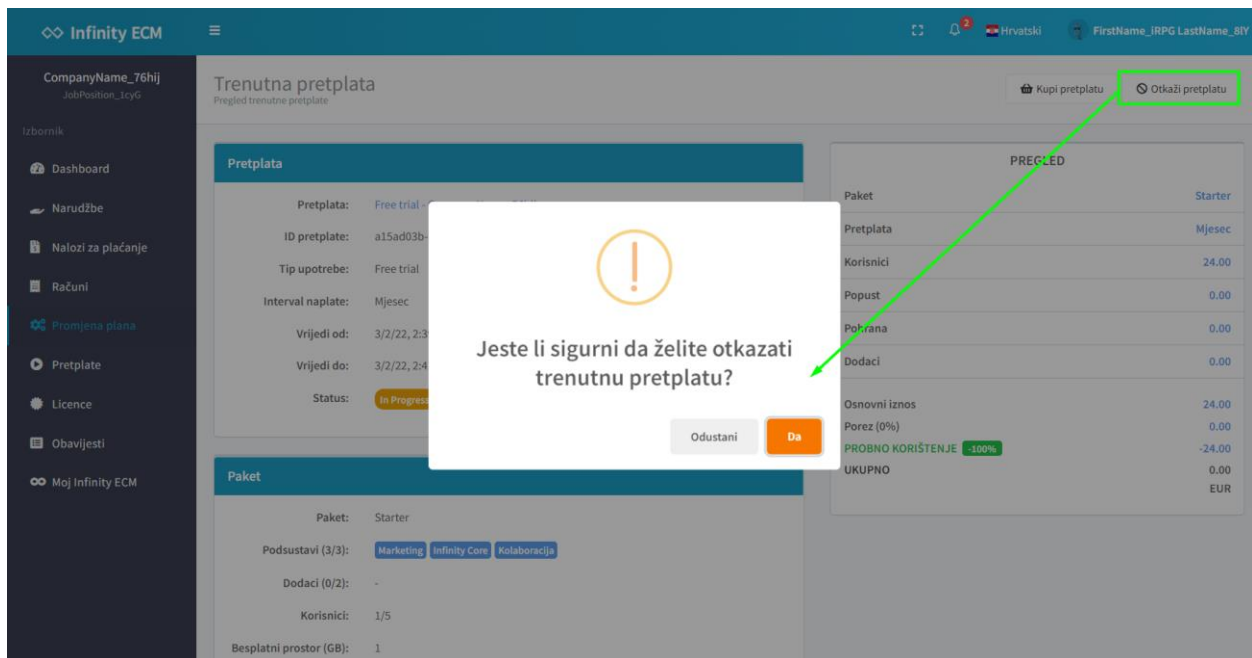


Figure 12. Canceling subscription

5. Adding new order

While using the Cloud portal, it is possible to create new orders. A new order is created via the **New Order** option in the **Orders** menu. A new form opens where you select the product you want to order and the method of payment. Created order can be seen in the **Order overview**.

Also, with each subscription change (upgrade, downgrade, subsystem change), a new order is generated. If the user changes the subscription, eg free-trial to commercial, a new order is generated. Order items are subsystems that are activated when you purchase or change a subscription.

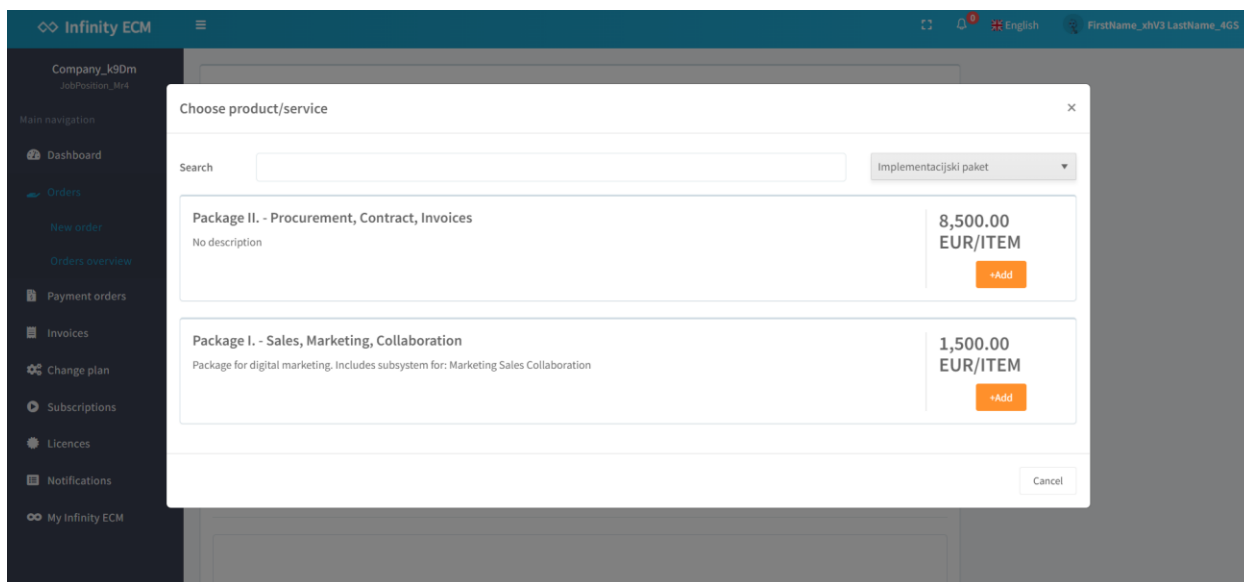


Figure 13. Adding products to order

A payment order is created from the order, which is located in the **Payment Order Overview**. The calculation of the payment of the work order is done in the process with the system administrator.

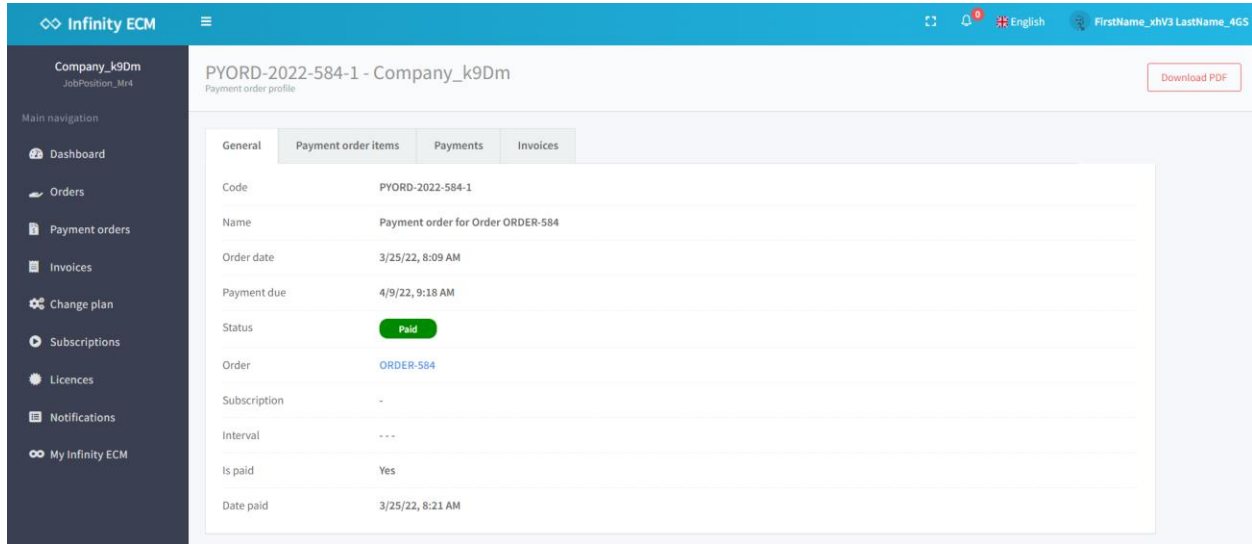


Figure 14. Payment order

The user can pay the payment order by clicking on the **Pay** button in the upper right corner. The payment process starts where the user can choose the payment method. If card payment is selected, then the cards entered on the registered user's profile are used.

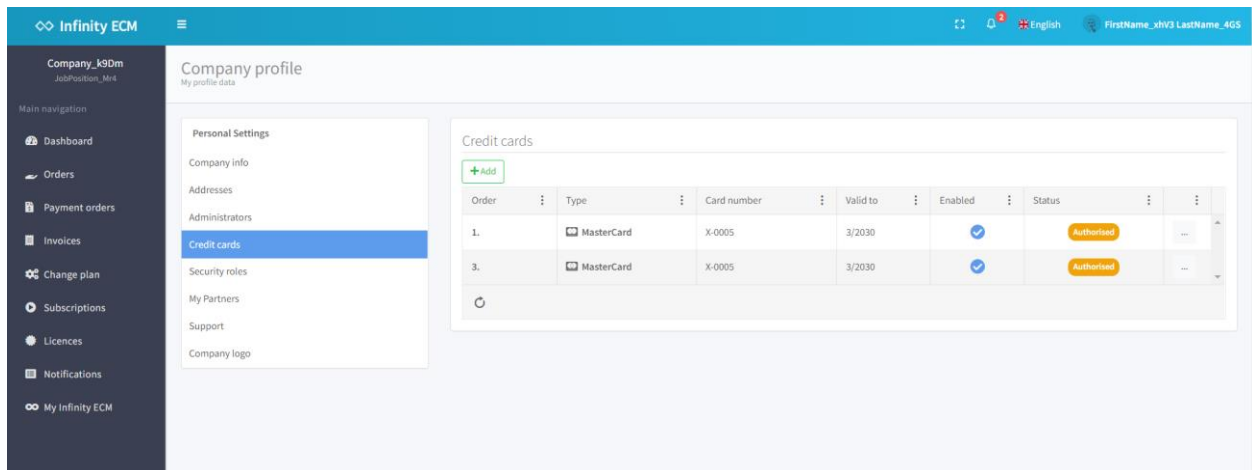
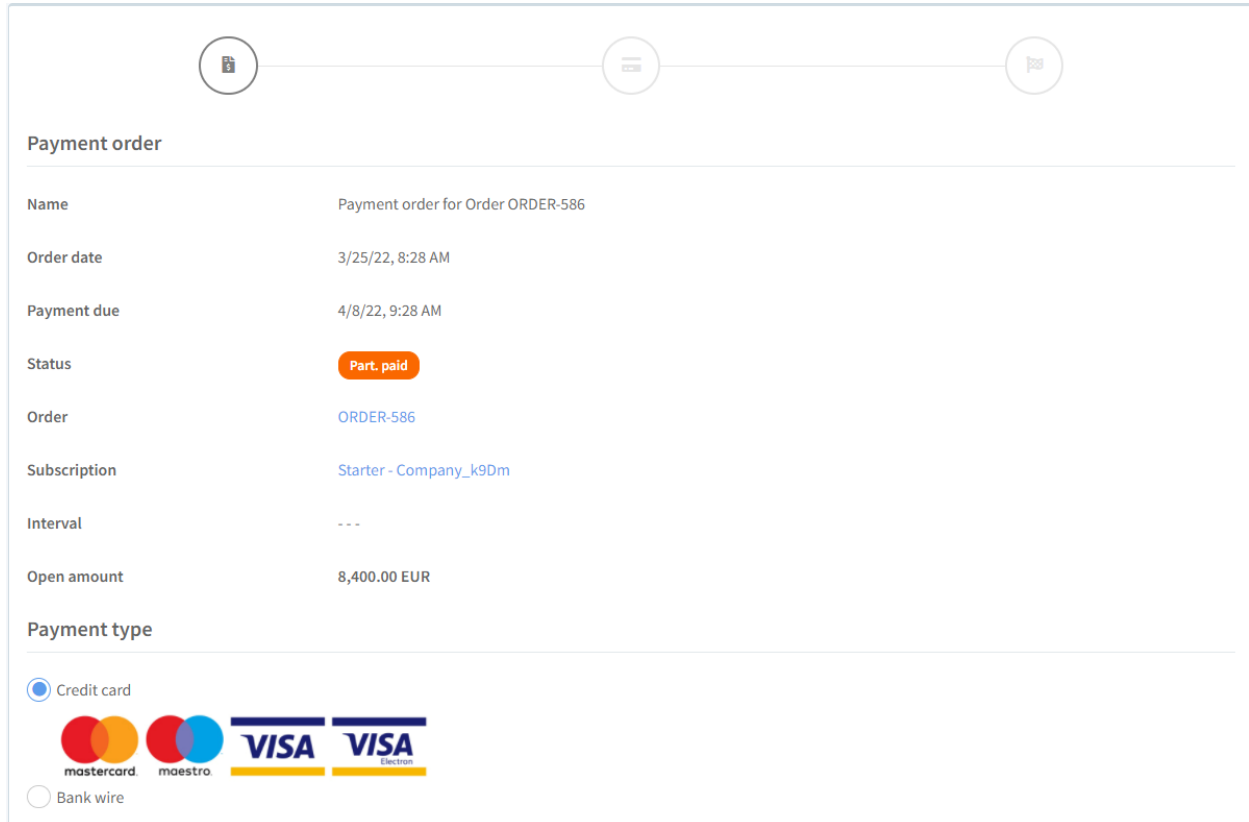


Figure 15. Credit card overview

If the payment via bank account is selected, then the payment is not made to the end, but the payment data is displayed on the basis of which the user can pay directly in the bank, via mBanking or in some other way.



Payment order

Name: Payment order for Order ORDER-586

Order date: 3/25/22, 8:28 AM

Payment due: 4/8/22, 9:28 AM

Status: **Part. paid**

Order: ORDER-586





Subscription: Starter - Company_k9Dm

Interval: ---

Open amount: 8,400.00 EUR

Payment type

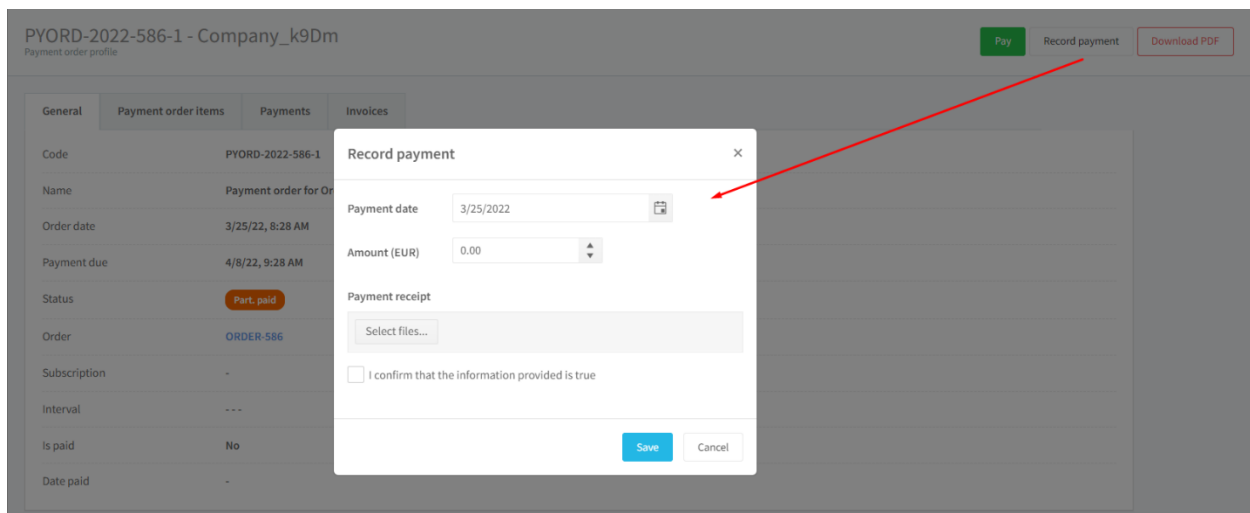
Credit card

Bank wire

Figure 16. Payment of payment order

In addition to the payment option, the user can enter a confirmation of payment which is sent to the administrator for verification. After the payment is made, the administrator must verify the payment and then change the status to *Paid*.



PYORD-2022-586-1 - Company_k9Dm

Payment order profile

[Pay](#) [Record payment](#) [Download PDF](#)

| General | Payment order items | Payments | Invoices |
|--------------|----------------------|----------|----------|
| Code | PYORD-2022-586-1 | | |
| Name | Payment order for Or | | |
| Order date | 3/25/22, 8:28 AM | | |
| Payment due | 4/8/22, 9:28 AM | | |
| Status | Part. paid | | |
| Order | ORDER-586 | | |
| Subscription | - | | |
| Interval | --- | | |
| Is paid | No | | |
| Date paid | - | | |

Record payment [X]

Payment date: 3/25/2022

Amount (EUR): 0.00

Payment receipt

Select files...

I confirm that the information provided is true

[Save](#) [Cancel](#)

Figure 17. Pay entry

6. LAUNCHING INFINITY ECM – PORTAL

At the end of the menu is the **My Infinity ECM** option. By selecting this option, the Infinity ECM portal can be accessed directly.

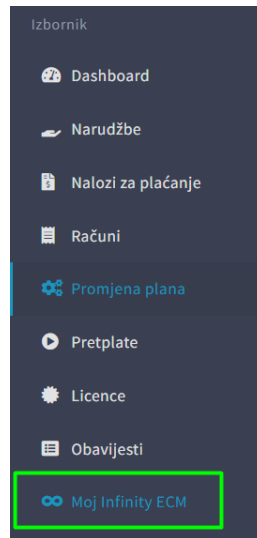


Figure 18. Launching Infinity ECM portal

The Infinity ECM portal opens in a new tab and is ready for use after a successful login.

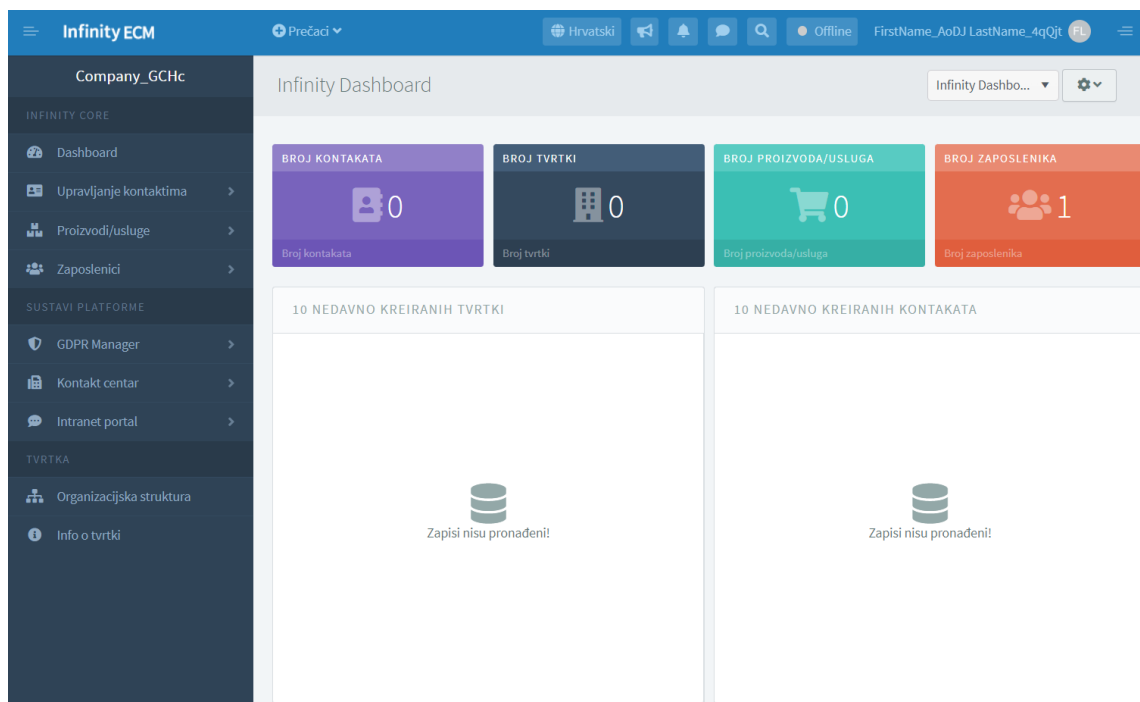


Figure 9. Infinity ECM portal

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