

# Sopra Finance Platform

## Setting Up Account

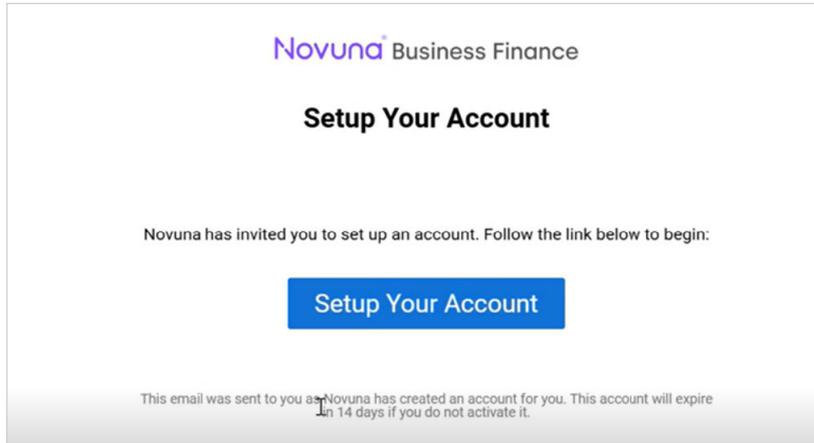
### User Guide

**Contents**

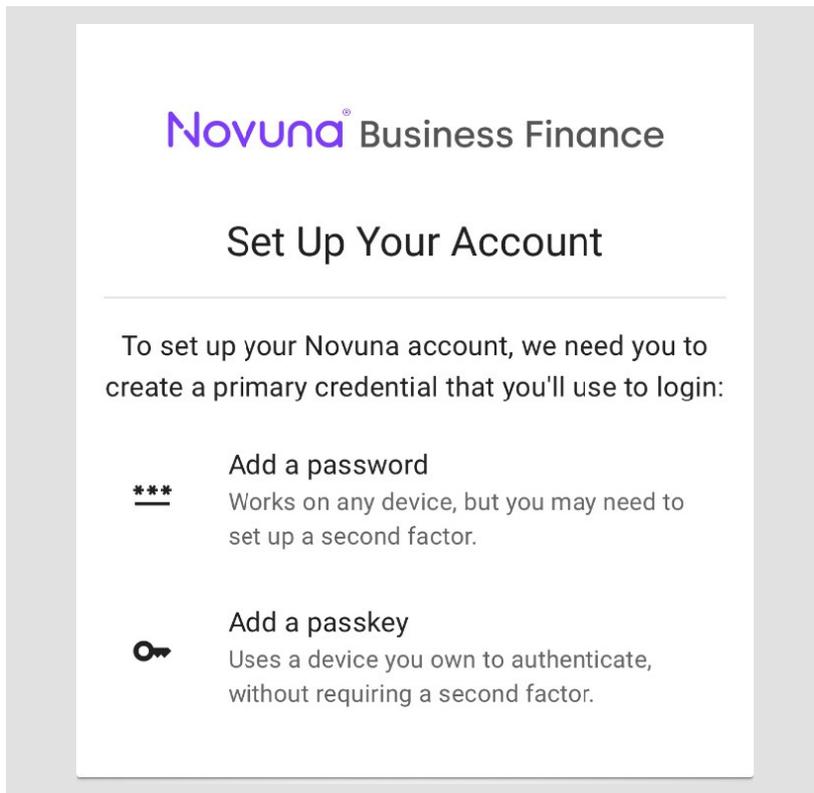
<b>Setting Up Account with Passkey</b>	<b>3</b>
<b>Setting Up Account with Password</b>	<b>8</b>

## Setting Up Account with Passkey

Before you can access the system you will need to go to the invitation that has been sent to you by email and click on set up your account. Please note you have **14 days** to activate your online account.



Select **Add a passkey**.



Enter your first name and surname, then enter a user account name example shown below.  
Name: **James Smith** / User Account Name: **JamesS**.

**Novuna**<sup>®</sup> Business Finance

### Add a new Passkey

Type

Mobile Device (e.g. smartphone, tablet, la... ▾)

Name

The name to use for this passkey (e.g. "My Phone"). This will be displayed when you view your passkeys later.

User Account Name

The name to store on your device for this passkey, which it may display when you login. Use something memorable so you recognise which account it belongs to.

Already have a passkey on this device?  
[Scan a QR code to add another device.](#)

Press **CONTINUE** then follow the security verification on your phone.

**Novuna**<sup>®</sup> Business Finance

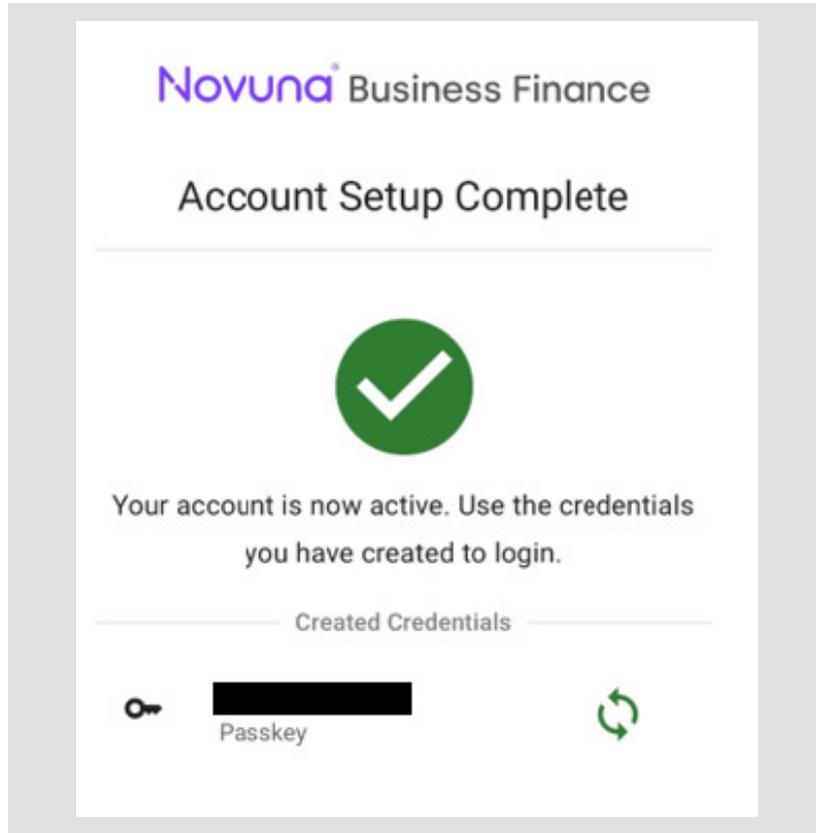
### Add a new Passkey



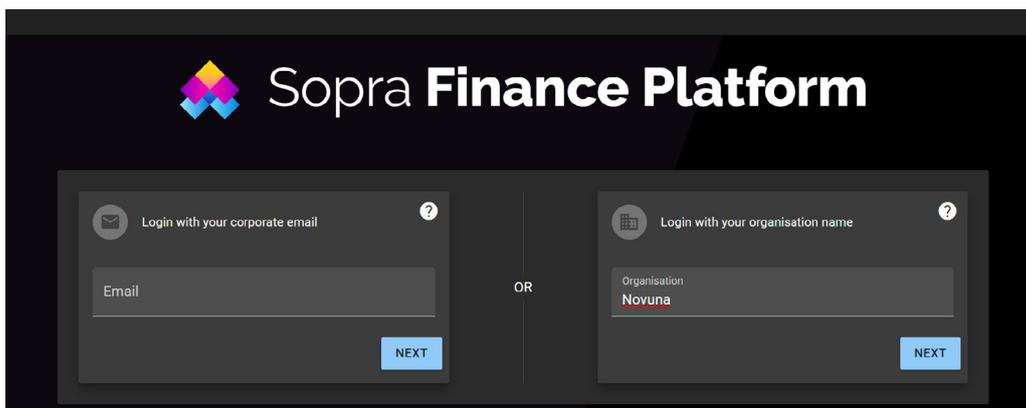
Your passkey was successfully registered.  
Choose 'Login with Passkey' when logging in to use it.

**CONTINUE**

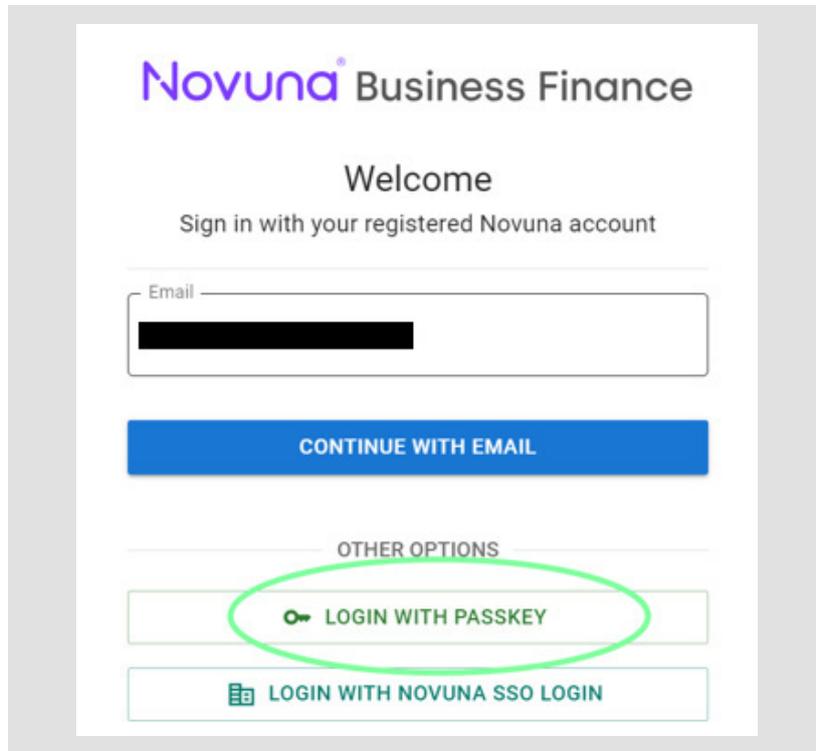
Account set up complete.



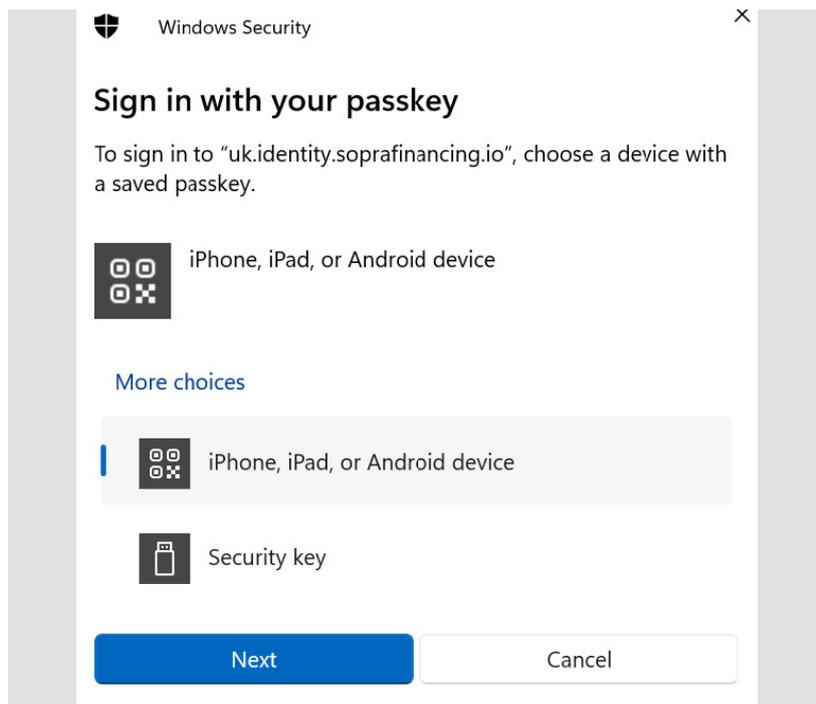
Now your account is all set up you can log into the system with your **Email Address** that was registered along with the organisation name **Novuna** then click next.



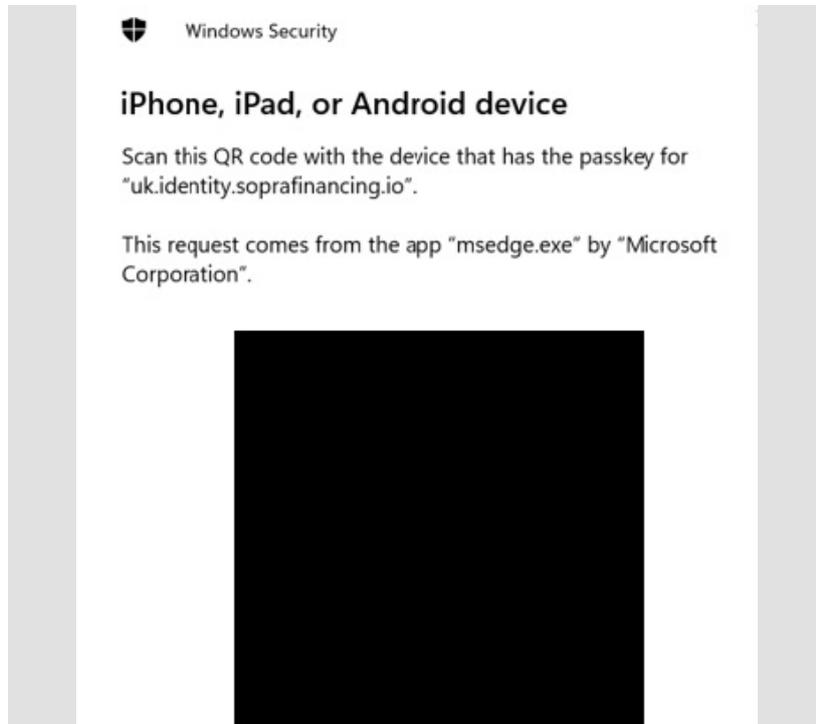
You will then come across the next screen where you will need to log with your passkey.



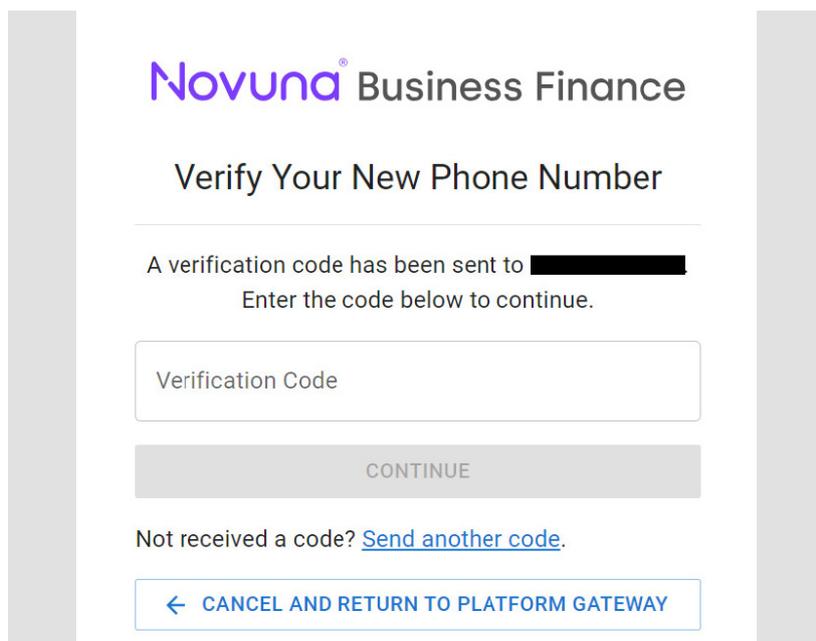
Click **Next**.



Scan the **QR Code** with your device.



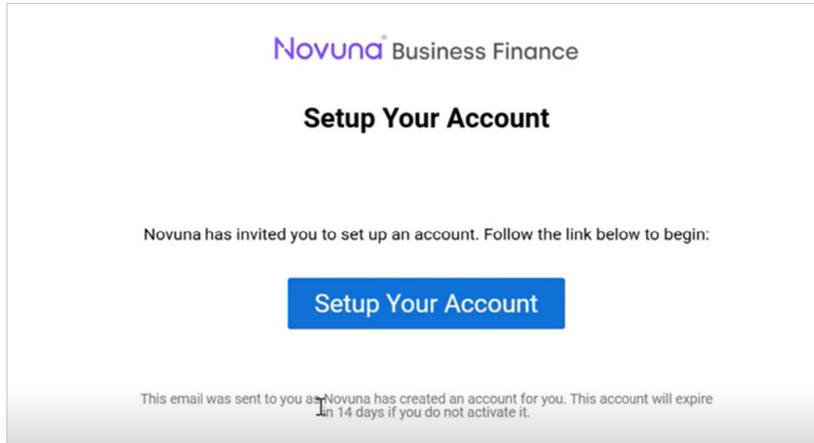
Sign in using the security method on your phone, then the next screen will appear where you will be sent a verification code on your device to enable you to log into the online system.



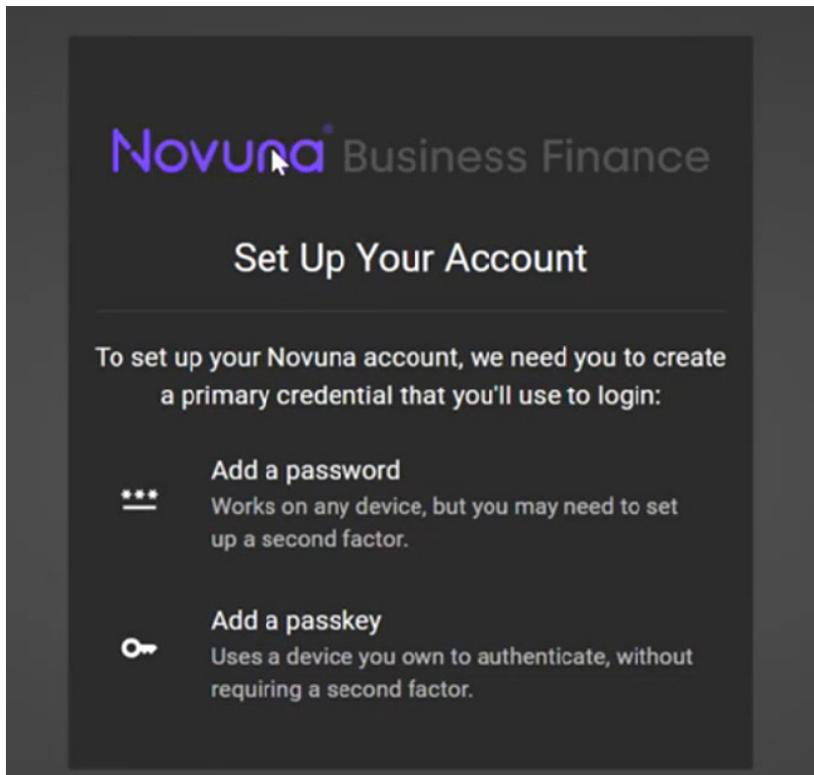
Once the code comes through on your device you should be able to log into the system successfully.

## Setting Up Account with Password

Before you can access the system you will need to go to the invitation that has been sent to you by email and click on set up your account. Please note you have **14 days** to activate your online account.



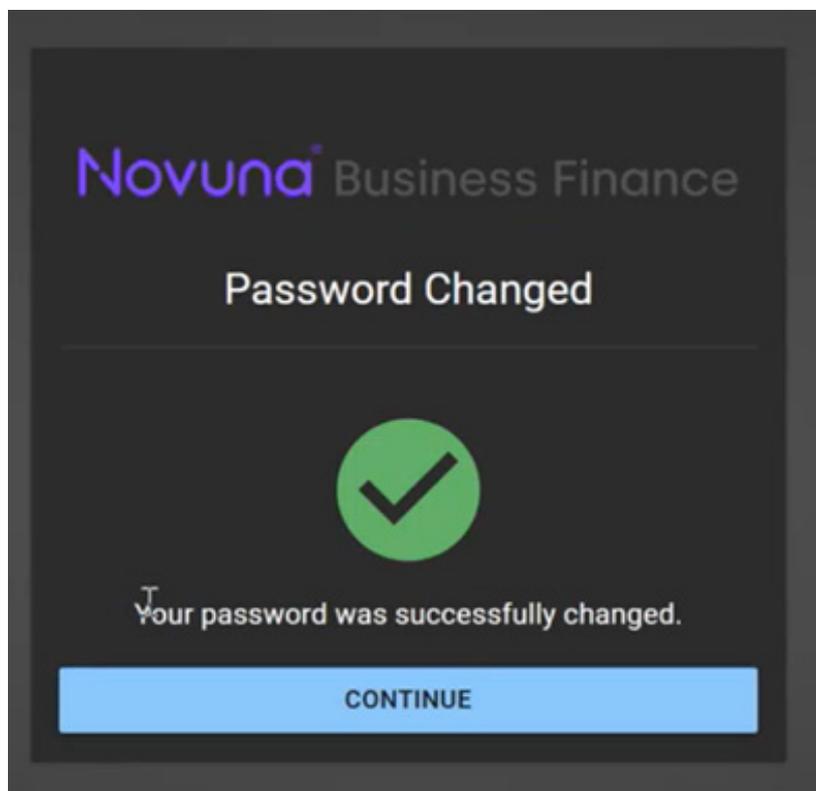
Users will need to select add a password which needs to be 10 characters and quite complex due to security measures.



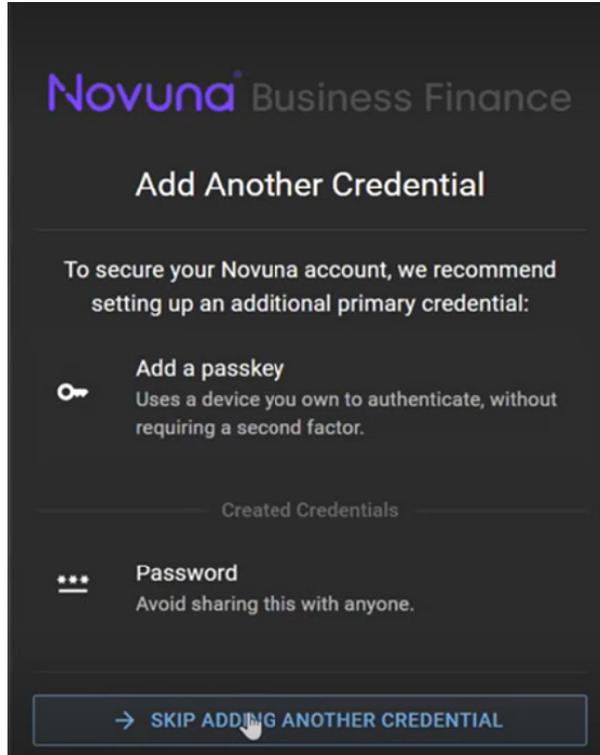
You'll then be asked to click on **CHANGE PASSWORD** to continue after an acceptable password is created.



The below notification will then appear once your password has been successfully changed, click on **CONTINUE**.



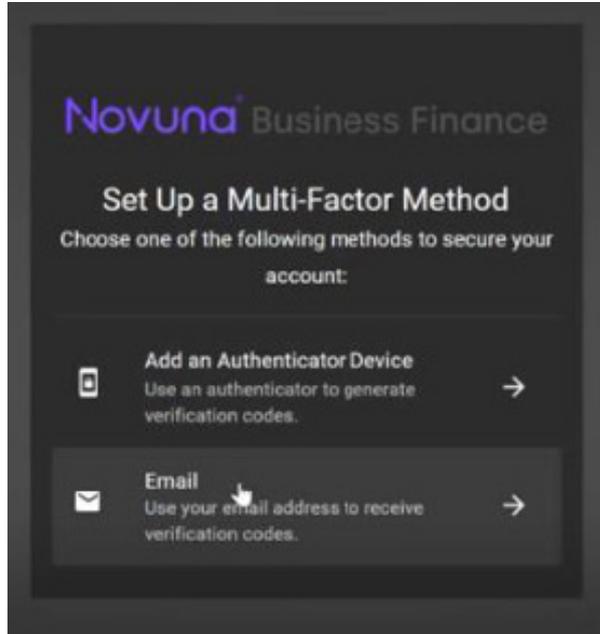
Select **SKIP ADDING A ANOTHER CREDENTIAL**.



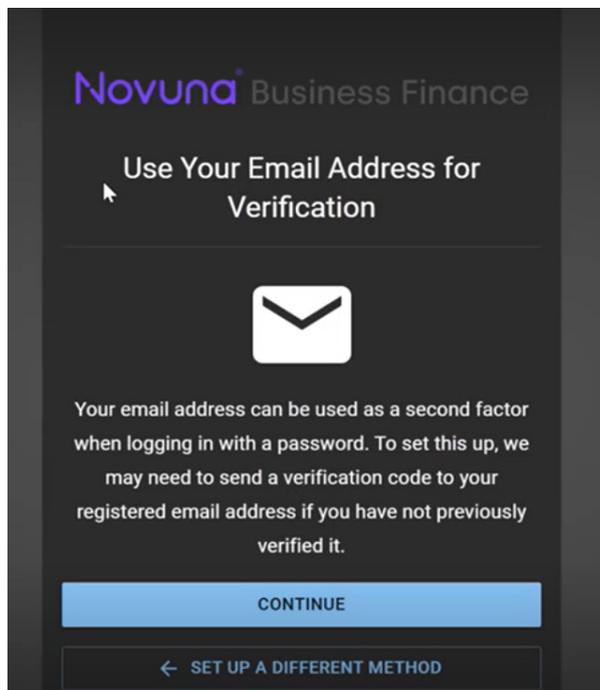
You will now be asked to continue where the second factor is required, select **CONTINUE**.



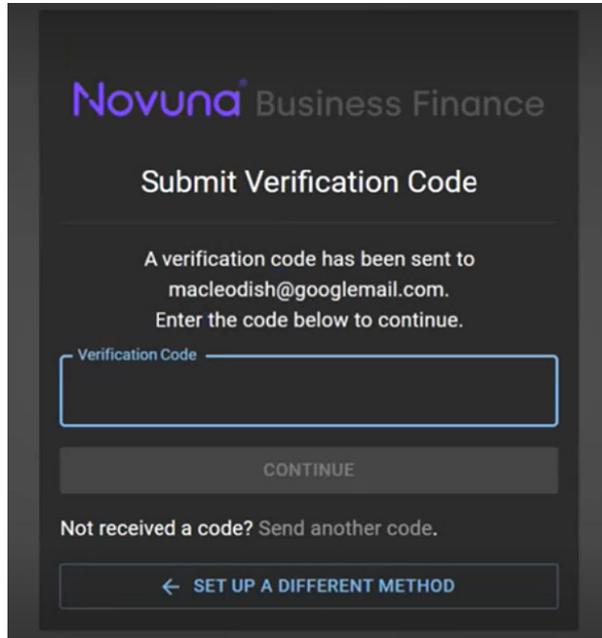
You will now need to select **Email** to receive a verification code.



By selecting the **Email** option you will then receive the below message where you will need to click on **CONTINUE**.



Then the below pop up box will appear where you will need to input the **Verification Code** that was sent to you on email.



The image shows a dark-themed mobile application screen for Novuna Business Finance. At the top, the logo 'Novuna Business Finance' is displayed in purple and white. Below the logo, the title 'Submit Verification Code' is centered. A message states: 'A verification code has been sent to macleodish@googlemail.com. Enter the code below to continue.' There is a text input field labeled 'Verification Code' with a blue border. Below the input field is a grey 'CONTINUE' button. At the bottom, there is a link that says 'Not received a code? Send another code.' and a button with a left-pointing arrow and the text 'SET UP A DIFFERENT METHOD'.

Account will now be set up and complete.

