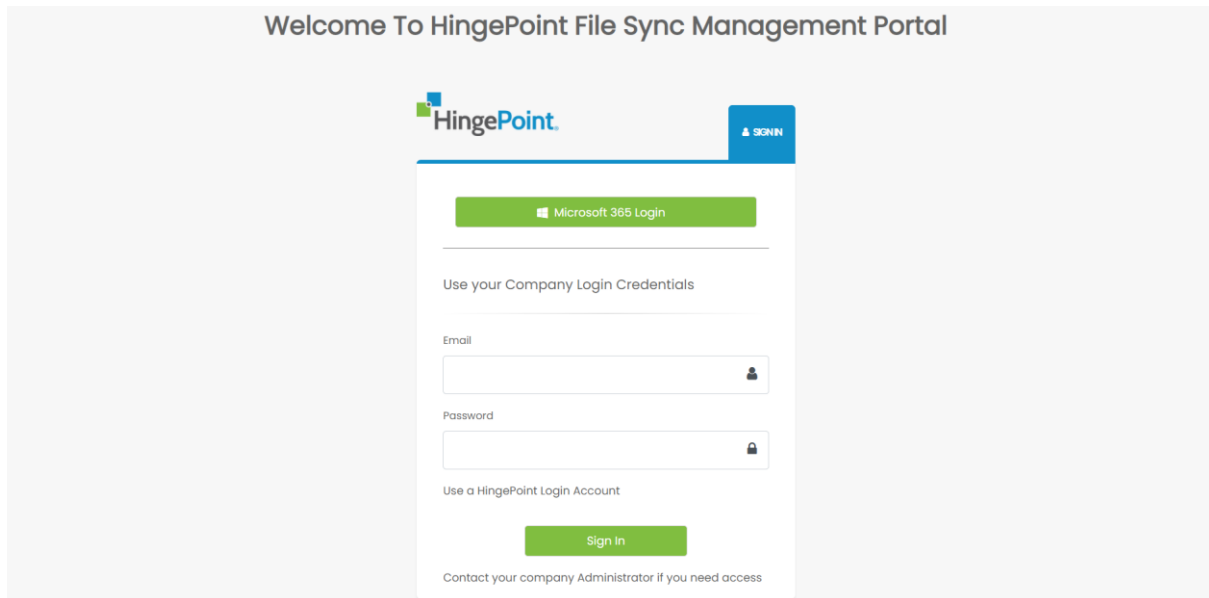


# **PROCORE FILE SYNC MANAGEMENT USER MANUAL**

## 1. Login:

**Step 1:** Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



Welcome To HingePoint File Sync Management Portal

HingePoint

SIGN IN

Microsoft 365 Login

Use your Company Login Credentials

Email

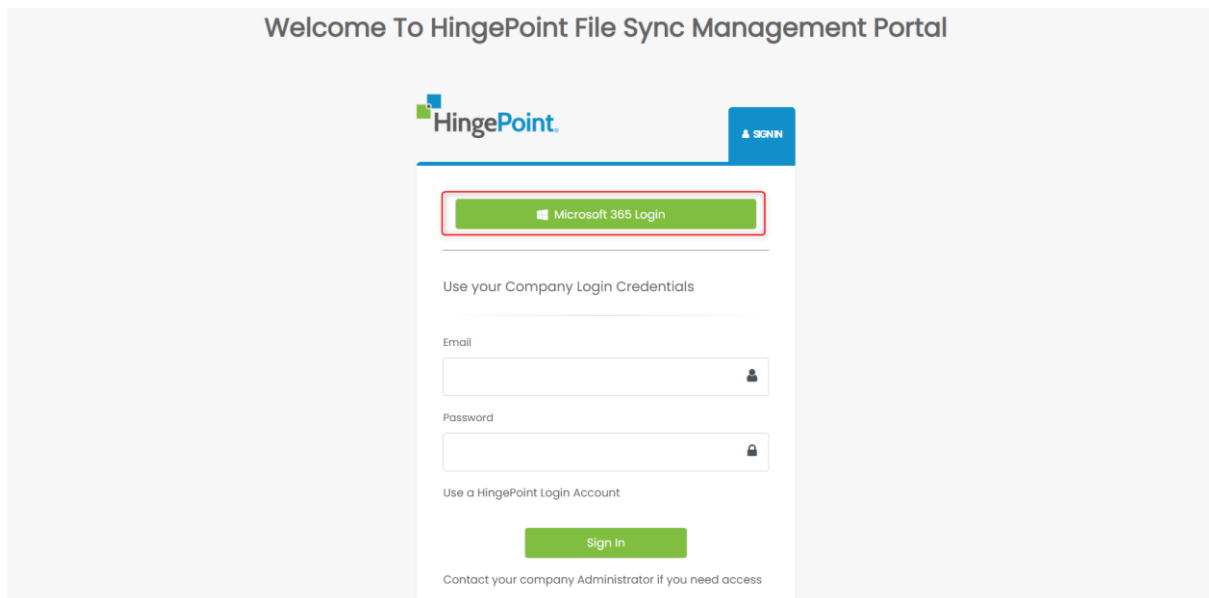
Password

Use a HingePoint Login Account

Sign In

Contact your company Administrator if you need access

**Step 2:** Click on Microsoft 365 Login button to login with your Microsoft account.



Welcome To HingePoint File Sync Management Portal

HingePoint

SIGN IN

Microsoft 365 Login

Use your Company Login Credentials

Email

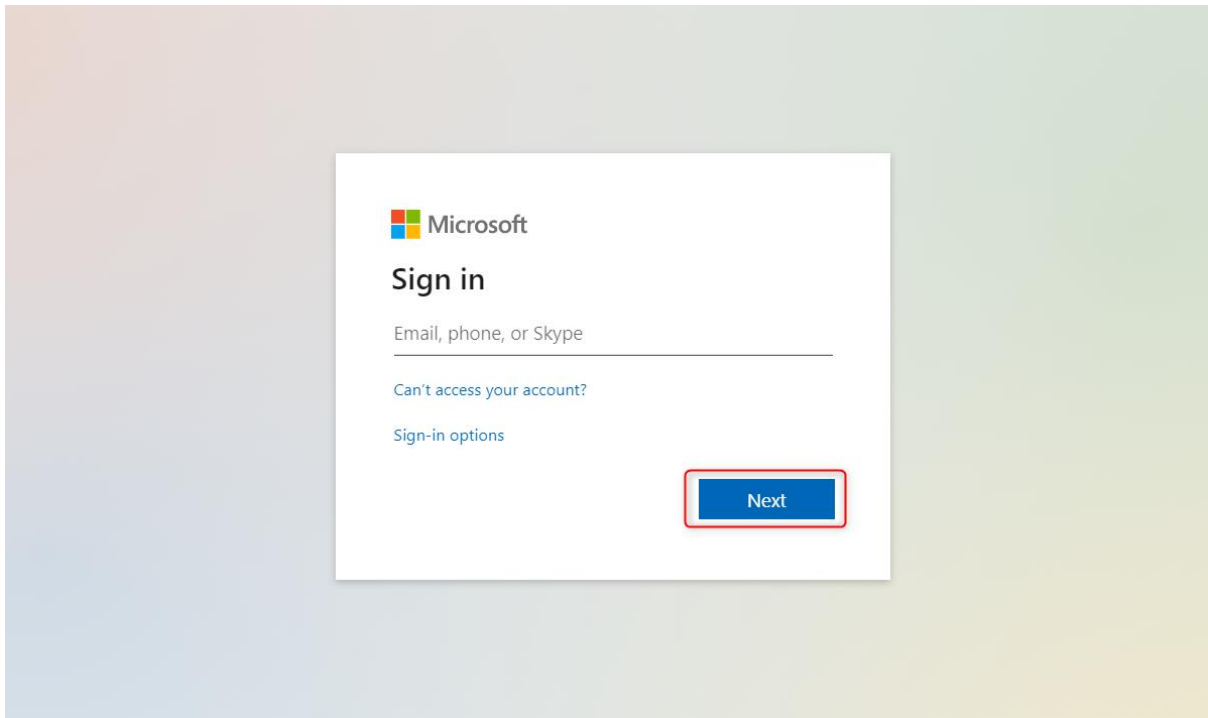
Password

Use a HingePoint Login Account

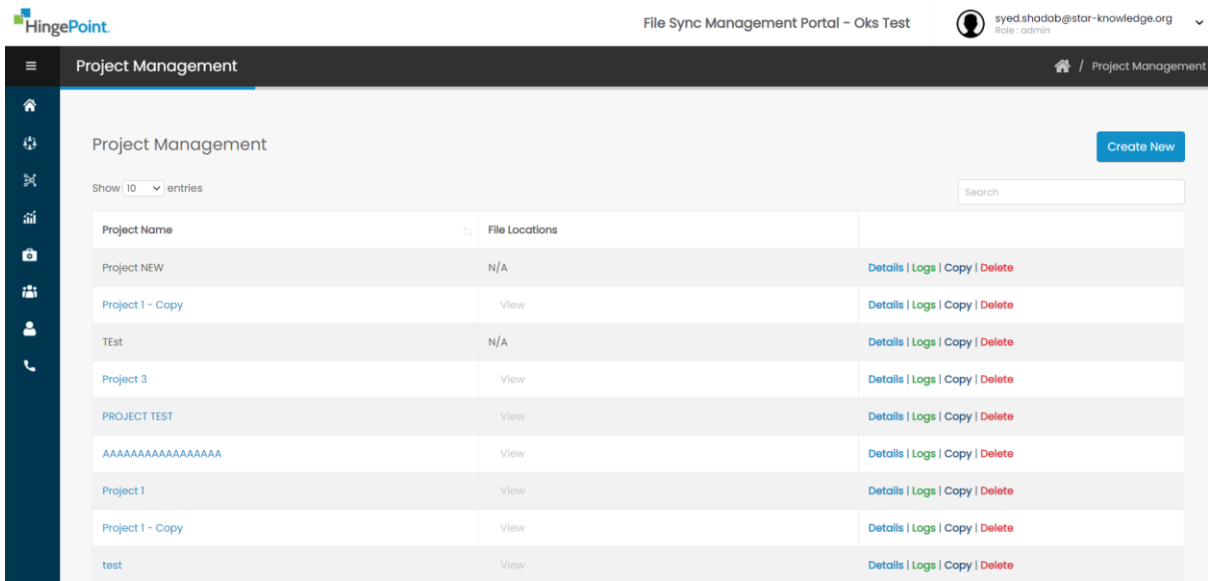
Sign In

Contact your company Administrator if you need access

**Step 3:** Enter your credentials and click on next.



**Step 4:** The Home Page is displayed.

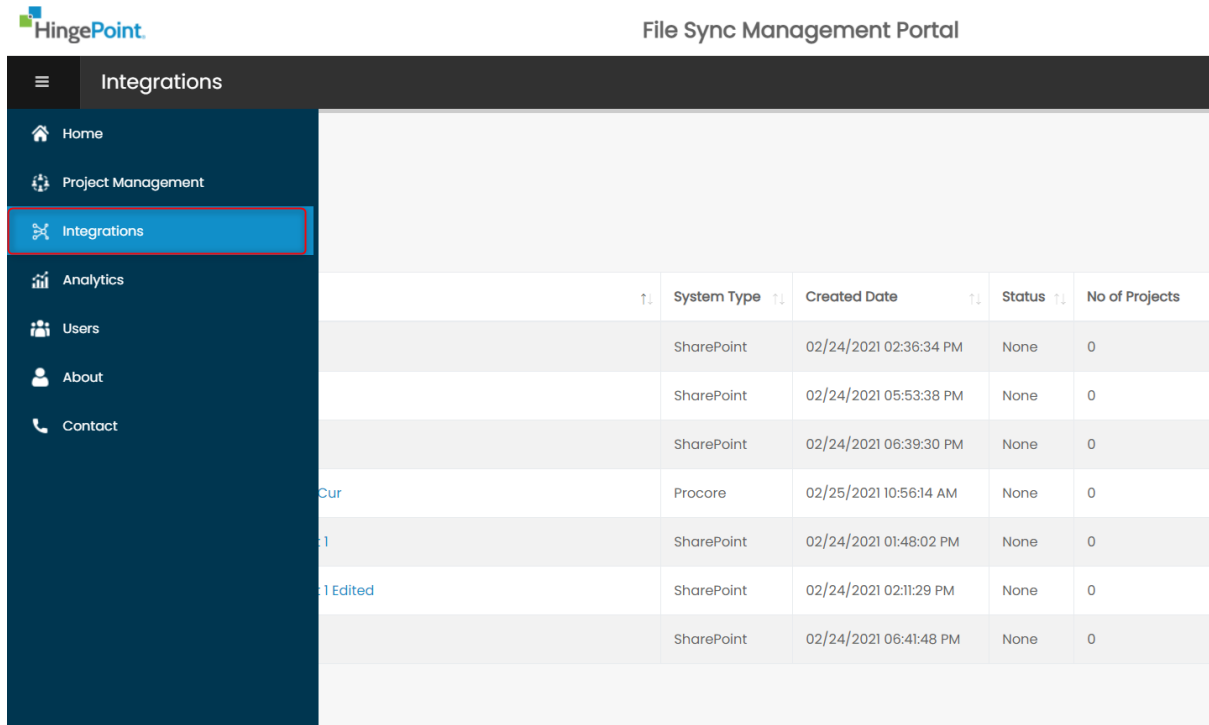


## 2. Integration:

### 2.1 Create New Integration:

**Step 1:** Click on integration from the left navigation bar.

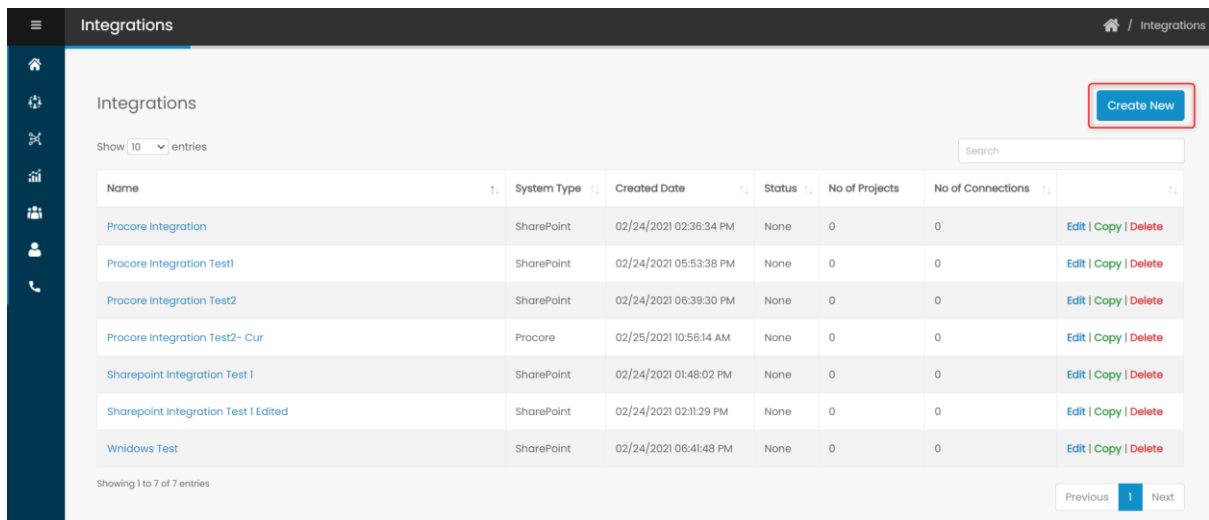
**NOTE:** Only Super Admins and Account Admins will be able to access the integration screen.



The screenshot shows the HingePoint File Sync Management Portal. The left navigation bar is visible with 'Integrations' highlighted. The main content area displays a table of integrations with the following data:

	System Type	Created Date	Status	No of Projects
	SharePoint	02/24/2021 02:36:34 PM	None	0
	SharePoint	02/24/2021 05:53:38 PM	None	0
	SharePoint	02/24/2021 06:39:30 PM	None	0
Procure	Procure	02/25/2021 10:56:14 AM	None	0
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0
	SharePoint	02/24/2021 06:41:48 PM	None	0

**Step 2:** Click on create new button.



The screenshot shows the HingePoint File Sync Management Portal with the 'Create New' button highlighted in a red box. The page displays a table of integrations with the following data:

Name	System Type	Created Date	Status	No of Projects	No of Connections	
Procure Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit   Copy   Delete
Procure Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit   Copy   Delete
Procure Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit   Copy   Delete
Procure Integration Test2- Cur	Procure	02/25/2021 10:56:14 AM	None	0	0	Edit   Copy   Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit   Copy   Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit   Copy   Delete
Windows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit   Copy   Delete

**Step 3:** Enter the data and click on save.

Create New Integration

Name \*

Description

System Type \*

## 2.2 Edit an Integration:

**Step 1:** Click on integration from the left navigation bar.

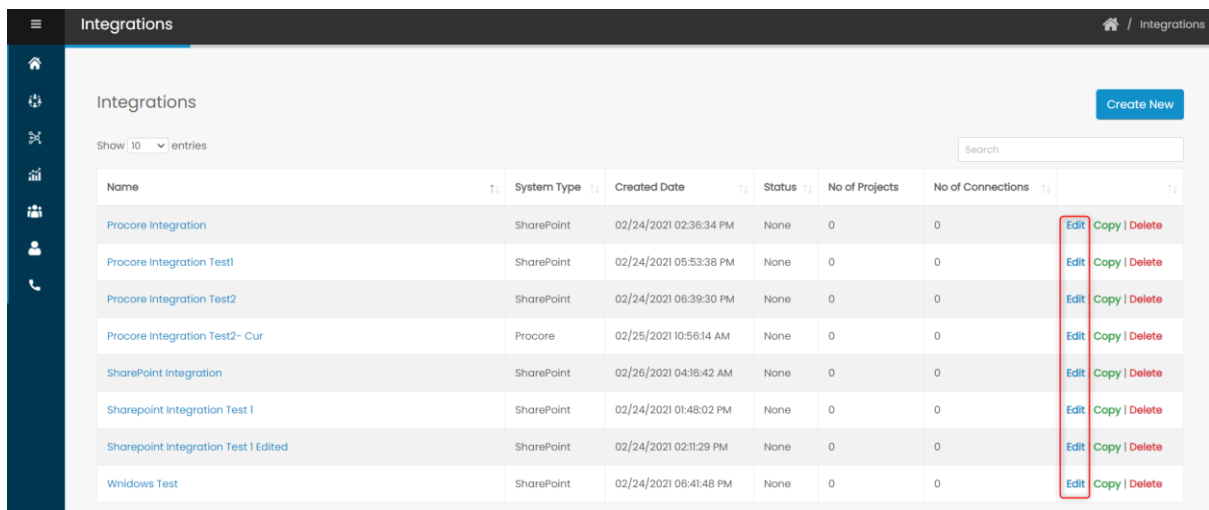
**NOTE: Only Super Admins and Account Admins will be able to access the integration screen.**

HingePoint File Sync Management Portal

Integrations

	System Type	Created Date	Status	No of Projects
	SharePoint	02/24/2021 02:36:34 PM	None	0
	SharePoint	02/24/2021 05:53:38 PM	None	0
	SharePoint	02/24/2021 06:39:30 PM	None	0
Cur	Procure	02/25/2021 10:56:14 AM	None	0
1	SharePoint	02/24/2021 01:48:02 PM	None	0
1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0
	SharePoint	02/24/2021 06:41:48 PM	None	0

**Step 2:** Click on the edit button in the integration table for the integration that needs to be edited.



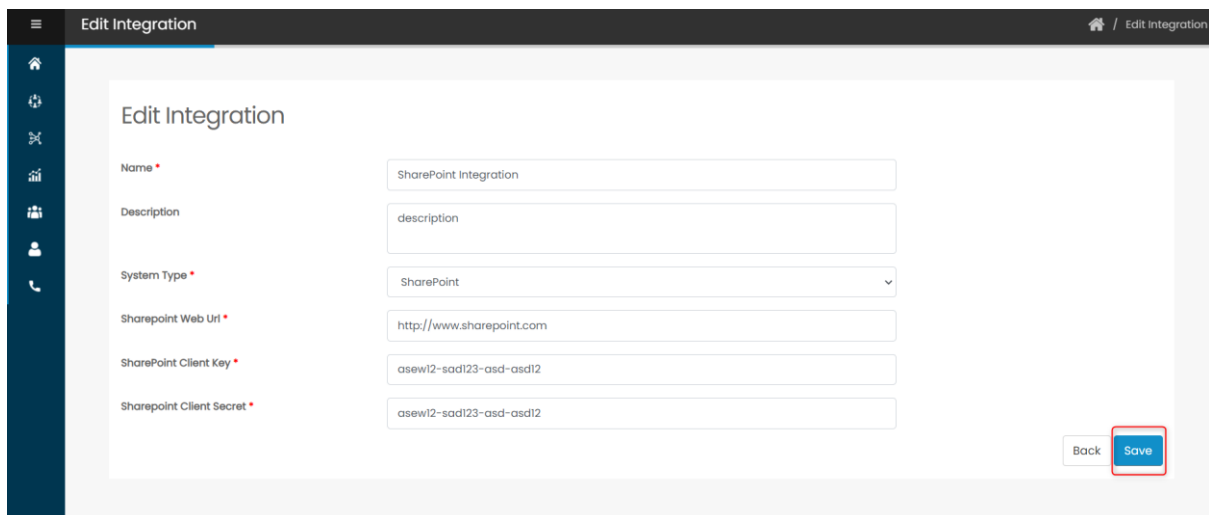
Integrations

Show 10 entries

Search

Name	System Type	Created Date	Status	No of Projects	No of Connections	
ProcCore Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit Copy   Delete
ProcCore Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit Copy   Delete
ProcCore Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit Copy   Delete
ProcCore Integration Test2- Cur	ProcCore	02/25/2021 10:56:14 AM	None	0	0	Edit Copy   Delete
SharePoint Integration	SharePoint	02/26/2021 04:16:42 AM	None	0	0	Edit Copy   Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit Copy   Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit Copy   Delete
Whidows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit Copy   Delete

**Step 3:** Update the fields and click on save.



Edit Integration

Name \* SharePoint Integration

Description description

System Type \* SharePoint

Sharepoint Web Uri \* http://www.sharepoint.com

Sharepoint Client Key \* asewi2-sad123-asd-asd12

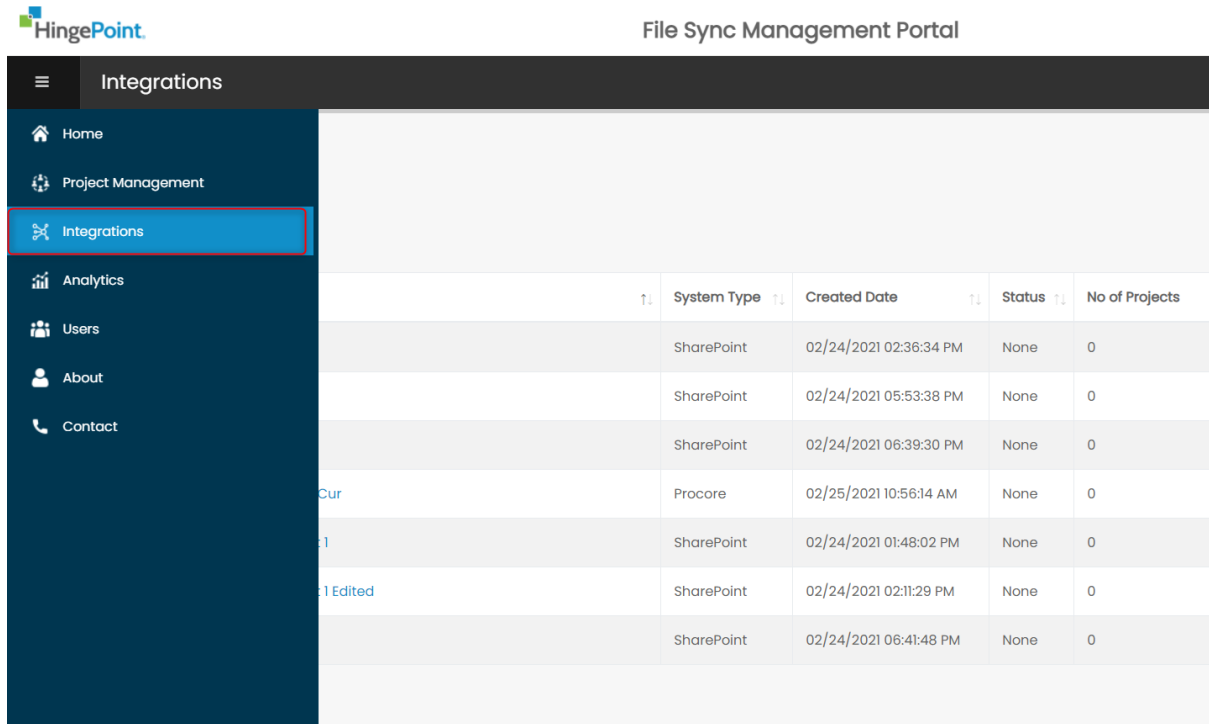
Sharepoint Client Secret \* asewi2-sad123-asd-asd12

Back Save

## 2.3 Delete an Integration:

**Step 1:** Click on integration from the left navigation bar.

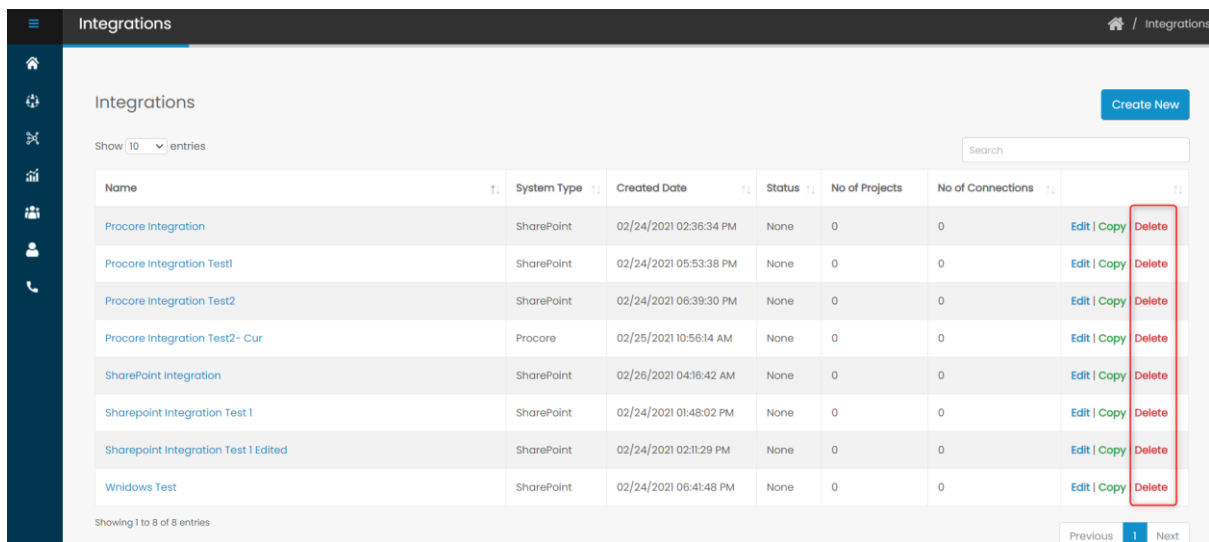
**NOTE: Only Super Admins and Account Admins will be able to access the integration screen.**



The screenshot shows the HingePoint File Sync Management Portal. The left navigation bar is visible, with 'Integrations' highlighted in a blue box with a red border. The main content area displays a table of integrations with the following columns: System Type, Created Date, Status, and No of Projects.

	System Type	Created Date	Status	No of Projects
	SharePoint	02/24/2021 02:36:34 PM	None	0
	SharePoint	02/24/2021 05:53:38 PM	None	0
	SharePoint	02/24/2021 06:39:30 PM	None	0
Cur	Procure	02/25/2021 10:56:14 AM	None	0
1	SharePoint	02/24/2021 01:48:02 PM	None	0
1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0
	SharePoint	02/24/2021 06:41:48 PM	None	0

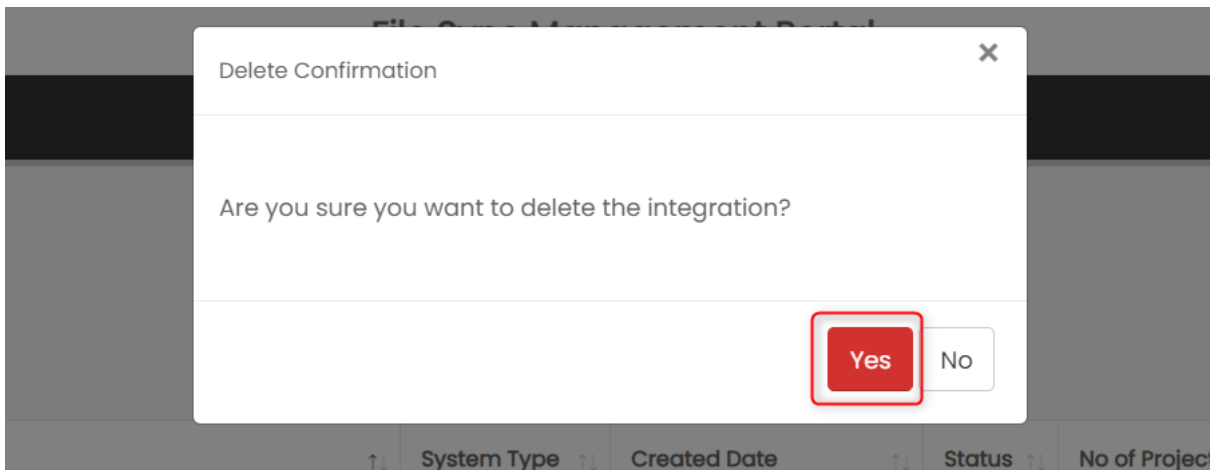
**Step 2:** Click on the delete button in the integration table for the integration that needs to be deleted.



The screenshot shows the HingePoint File Sync Management Portal with the 'Integrations' page. The left navigation bar is visible. The main content area displays a table of integrations with the following columns: Name, System Type, Created Date, Status, No of Projects, and No of Connections. The 'Delete' button for the 'Procure Integration' row is highlighted with a red box.

Name	System Type	Created Date	Status	No of Projects	No of Connections	
Procure Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit   Copy   Delete
Procure Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit   Copy   Delete
Procure Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit   Copy   Delete
Procure Integration Test2- Cur	Procure	02/25/2021 10:56:14 AM	None	0	0	Edit   Copy   Delete
SharePoint Integration	SharePoint	02/26/2021 04:16:42 AM	None	0	0	Edit   Copy   Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit   Copy   Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit   Copy   Delete
Whidows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit   Copy   Delete

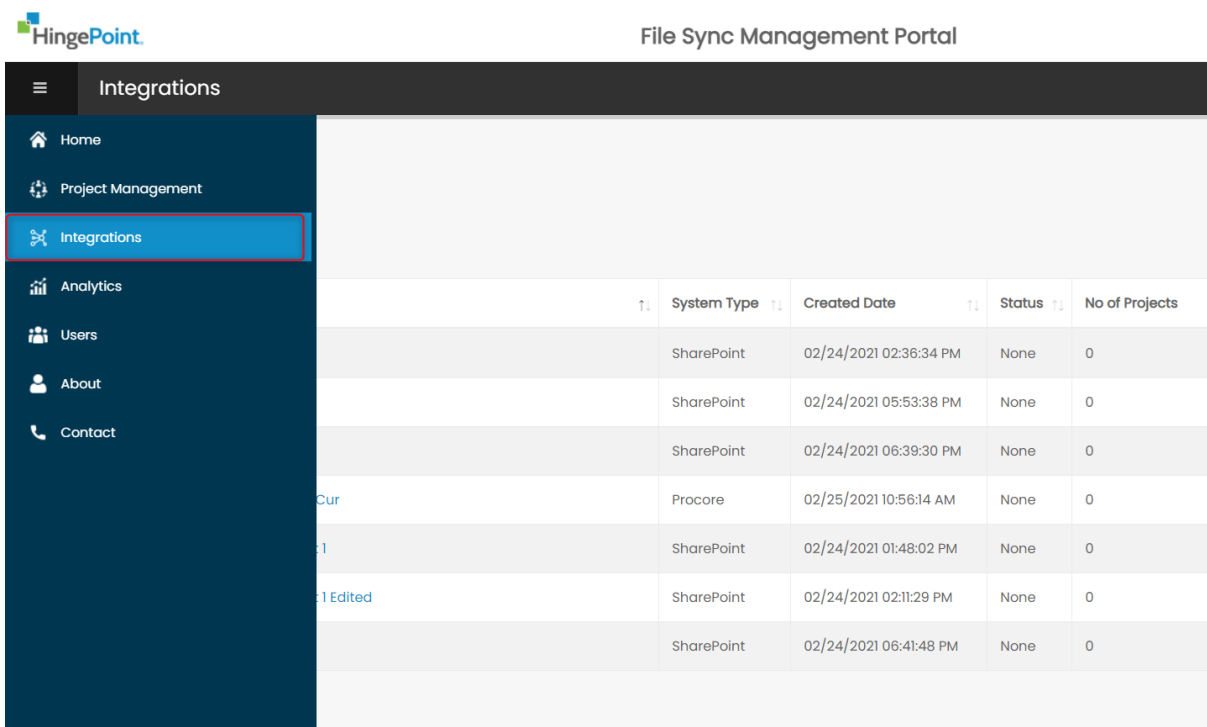
**Step 3:** Click on yes to delete the integration.



## 2.4 View an Integration:

**Step 1:** Click on integration from the left navigation bar.

**NOTE:** Only Super Admins and Account Admins will be able to access the integration screen.





**Step 2:** Click on the name of the integration which you want to view

Name	System Type	Created Date	Status	No of Projects	No of Connections	
ProcCore Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
ProcCore Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
ProcCore Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
ProcCore Integration Test2- Cur	ProcCore	02/25/2021 10:56:14 AM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
SharePoint Integration	SharePoint	02/26/2021 04:16:42 AM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Wnidows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

**Step 3:** The View Screen is displayed

**View Integration**

Name	SharePoint Integration
Description	description
System Type	SharePoint

Sharepoint Web Url \*

SharePoint Client Key \*

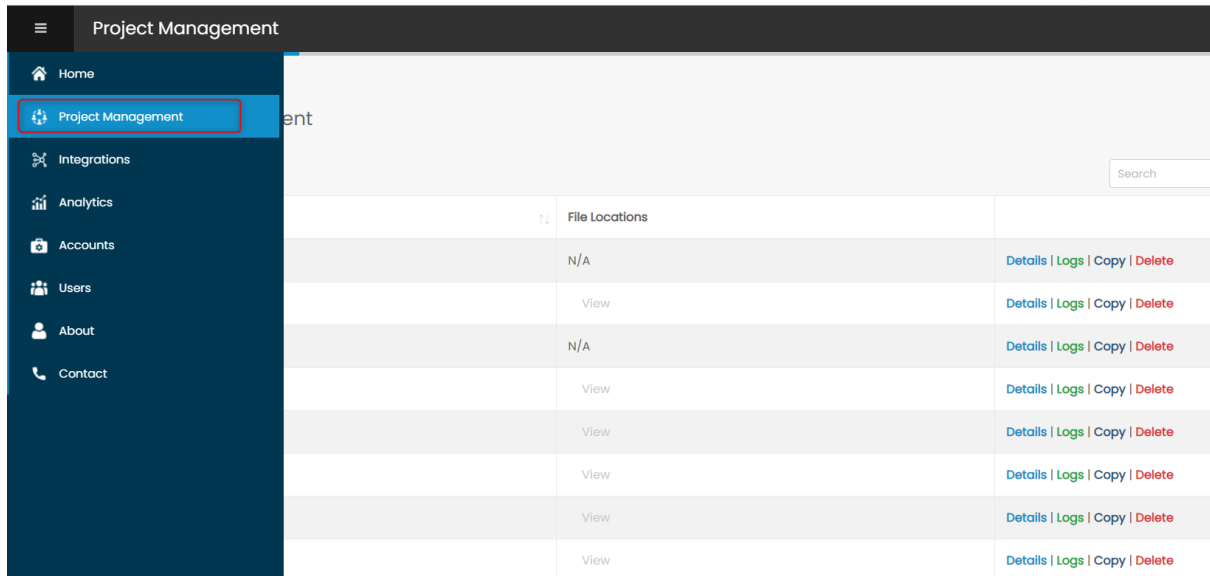
Sharepoint Client Secret \*

[Back](#) [Delete](#) [Edit](#)

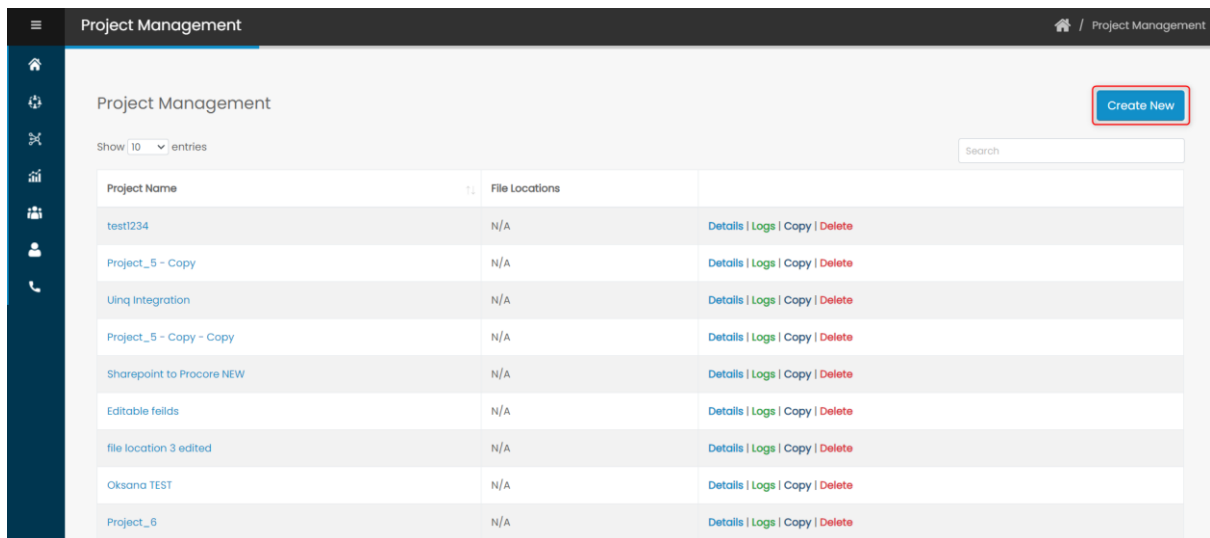
### 3. Project Management:

#### 3.1 Create a Project:

Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on create new button.



**Step 3:** Project Create Screen is displayed. Click on add connection to add a connection to the data.

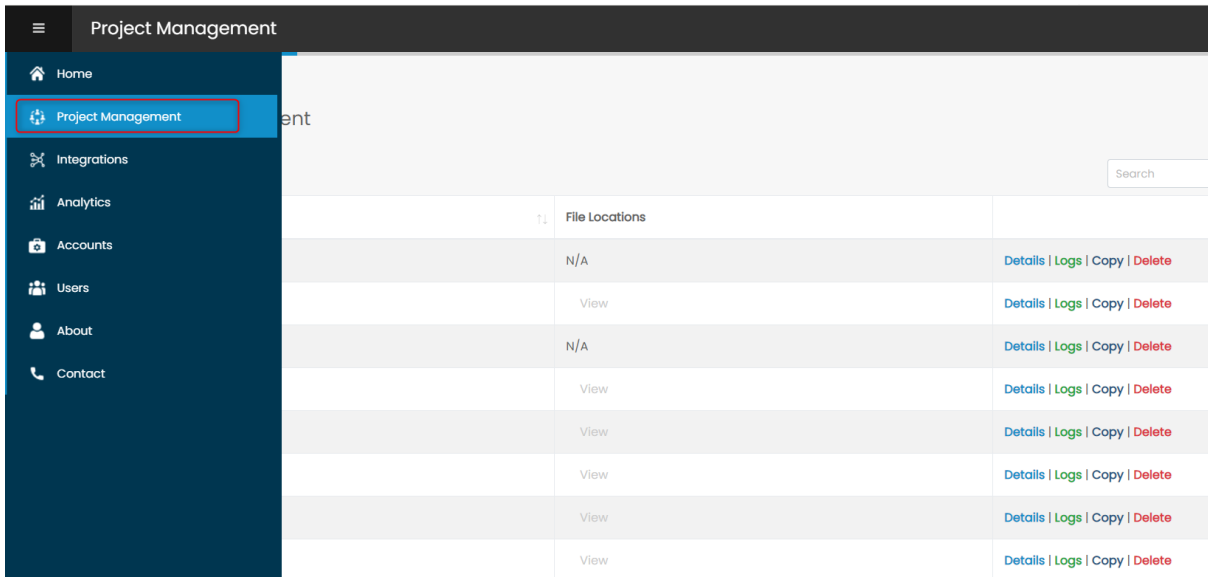
The screenshot shows the 'Create New Project' interface. At the top, there is a header with a menu icon, the text 'Create New Project', and a home icon with the text '/ Create New Project'. On the left, there is a vertical sidebar with several icons. The main content area has a title 'Create New Project' and two input fields: 'Project Name \*' with the placeholder 'Enter the Project Name' and 'Project Description' with the placeholder 'Enter the Project Description'. Below these fields is a button labeled '+Add More Connections' which is highlighted with a red box. At the bottom right, there are 'Back' and 'Save' buttons.

**Step 4:** Enter the data and click on save.

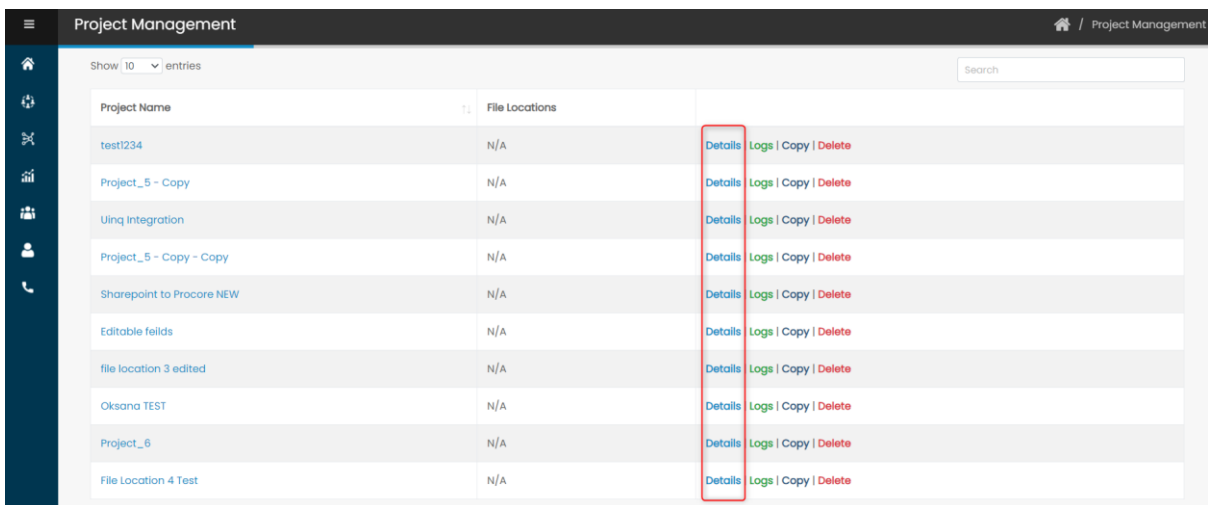
This screenshot shows the 'Add More Connections' section of the 'Create New Project' interface. It features two columns of configuration fields for a new connection. The first column is for 'Connection 1' and includes fields for 'Integration \*' (a dropdown menu with 'SharePoint' selected), 'File Location 1', 'SharePoint Site \*' (a text field containing 'https://hingspoint.sharepoint.com/sites/MSTeamsProccoreDemo'), 'SharePoint Library List \*' (a dropdown menu with '-Select-' selected), 'SharePoint Library list ID \*' (a text field with 'Enter the SharePoint list ID'), 'SharePoint Folder \*' (a dropdown menu with '-Select-' selected), and 'SharePoint Folder ID \*' (a text field with 'Enter the SharePoint Folder ID'). A green 'Test' button is located below these fields. The second column is for 'Integration \*' (a dropdown menu with 'Windows' selected), 'File Location 2', and 'Windows Directory Full Path \*' (a text field with 'Enter the Windows Directory Path'). A red 'Delete' button is located to the right of the 'Integration \*' dropdown. At the bottom left of this section is a '+Add More Connections' link, and at the bottom right are 'Back' and 'Save' buttons.

### 3.2 Edit a Project:

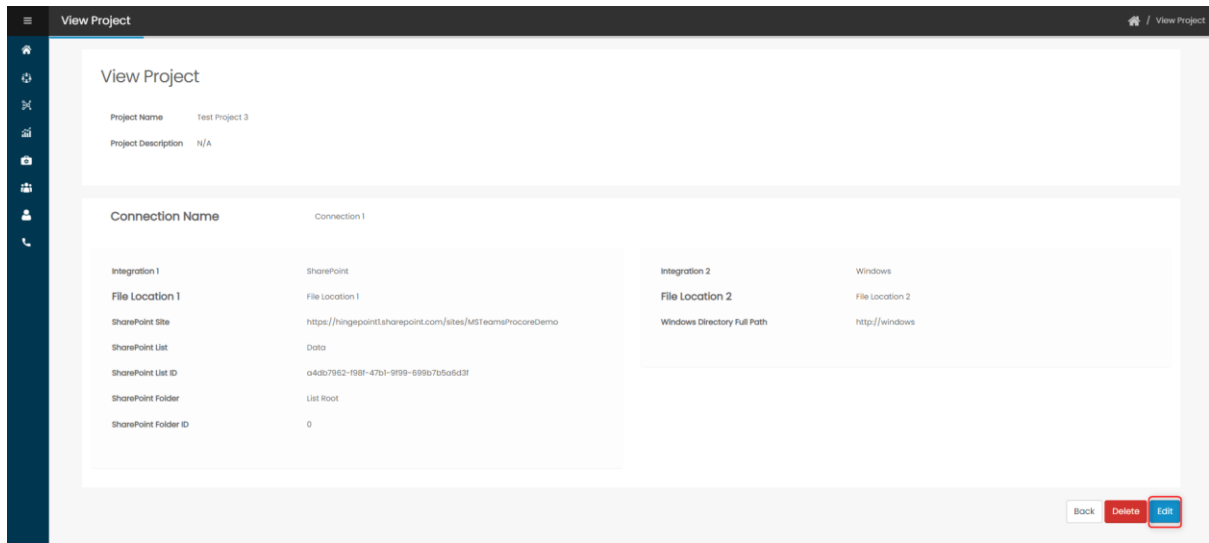
**Step 1:** Click on Project Management from the left navigation bar.



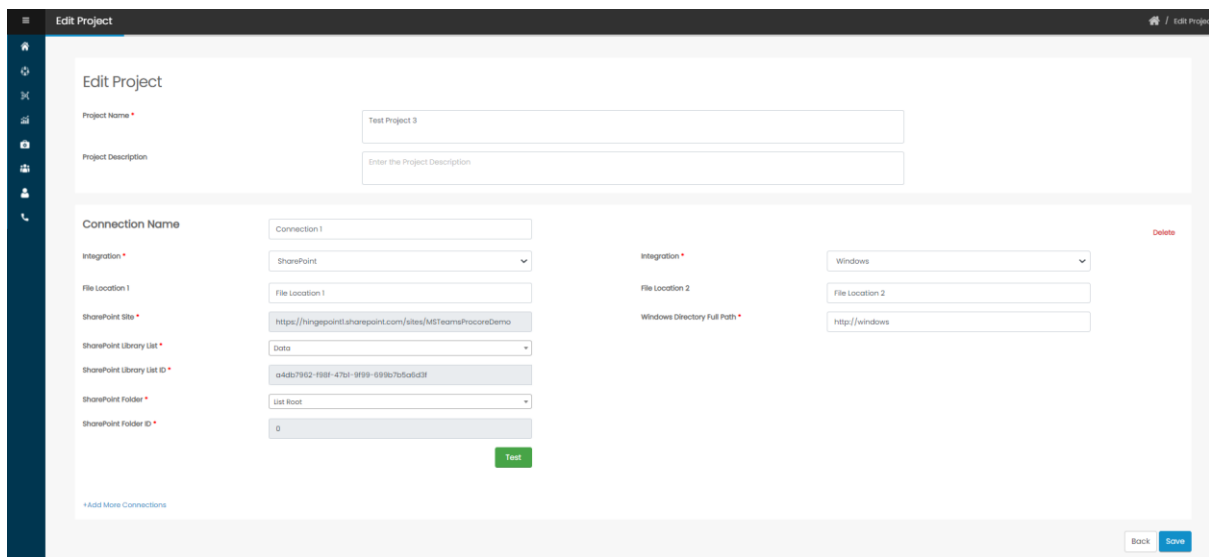
**Step 2:** Click on the Details button in the projects table for the project that needs to be edited.



**Step 4:** Details screen is displayed and click on edit.

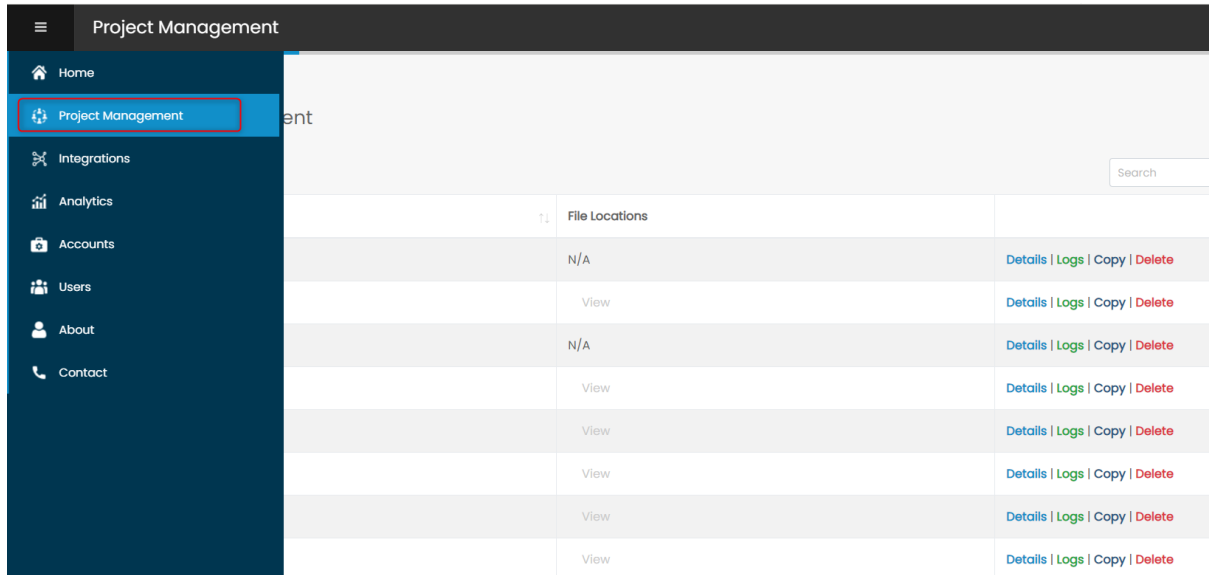


**Step 3:** Update the fields which needs to be updated and click on save.

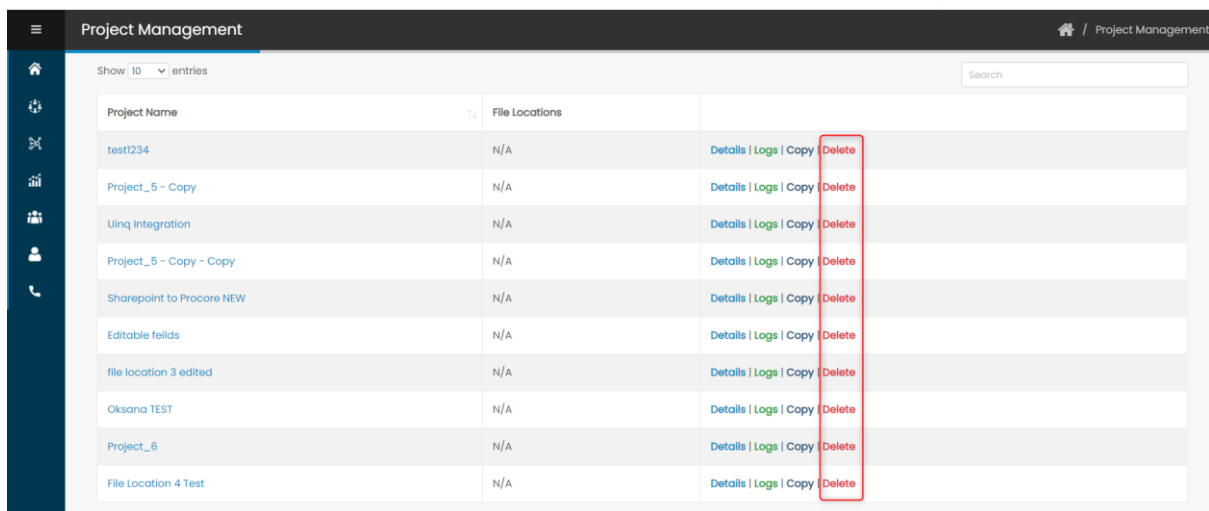


### 3.3 Delete a Project:

**Step 1:** Click on Project Management from the left navigation bar.

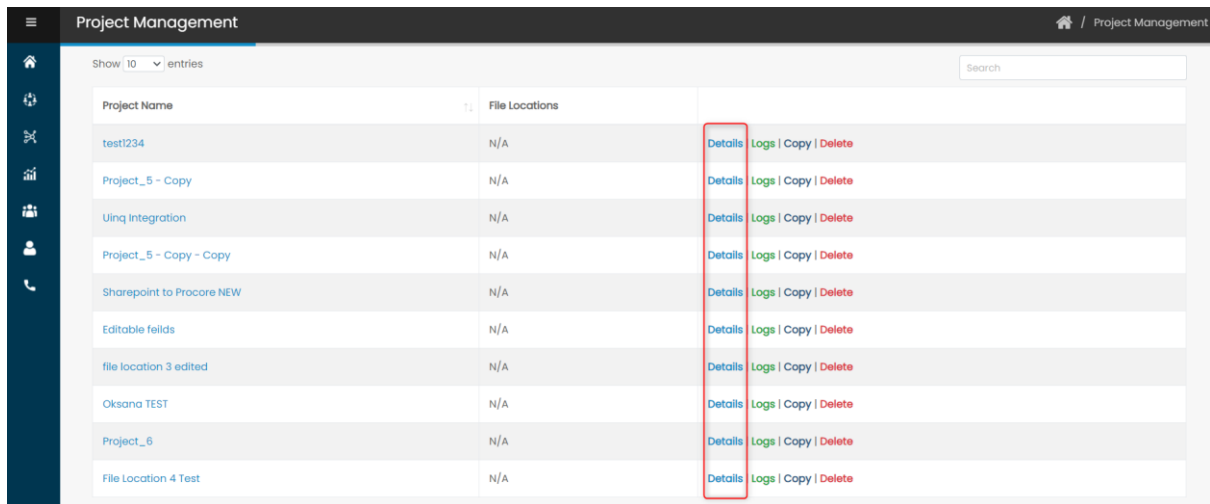


**Step 2:** Click on the delete button in the projects table for the project that needs to be deleted.





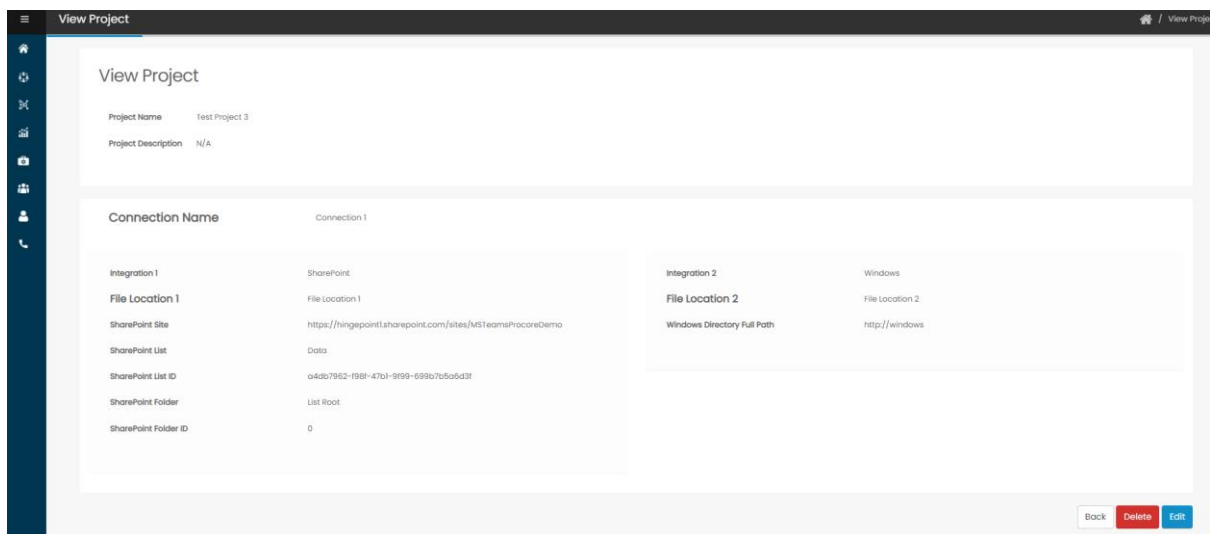
**Step 2:** Click on the details button in the projects table for the project that needs to be viewed.



The screenshot shows the 'Project Management' interface. At the top, there is a search bar and a 'Show 10 entries' dropdown. Below is a table with two columns: 'Project Name' and 'File Locations'. The table contains ten rows of project data. Each row has a 'Details' button highlighted in blue, followed by 'Logs | Copy | Delete' links in red. A red rectangular box highlights the 'Details' button for the first row, 'test1234'.

Project Name	File Locations	Details	Logs   Copy   Delete
test1234	N/A	Details	Logs   Copy   Delete
Project_5 - Copy	N/A	Details	Logs   Copy   Delete
Ulnq Integration	N/A	Details	Logs   Copy   Delete
Project_5 - Copy - Copy	N/A	Details	Logs   Copy   Delete
Sharepoint to Procure NEW	N/A	Details	Logs   Copy   Delete
Editable feilds	N/A	Details	Logs   Copy   Delete
file location 3 edited	N/A	Details	Logs   Copy   Delete
Oksana TEST	N/A	Details	Logs   Copy   Delete
Project_6	N/A	Details	Logs   Copy   Delete
File Location 4 Test	N/A	Details	Logs   Copy   Delete

**Step 3:** Details Screen is displayed.



The screenshot shows the 'View Project' details screen. The page title is 'View Project'. Below the title, there is a section for 'Project Name' (Test Project 3) and 'Project Description' (N/A). The main content area is titled 'Connection Name' and shows 'Connection 1'. It contains two integration cards: 'Integration 1' (SharePoint) and 'Integration 2' (Windows). Each card lists 'File Location 1' and 'File Location 2' with their respective details. At the bottom right, there are three buttons: 'Back', 'Delete', and 'Edit'.

**Project Information:**

- Project Name: Test Project 3
- Project Description: N/A

**Connection 1 Details:**

Integration	File Location
Integration 1 (SharePoint)	File Location 1
Integration 2 (Windows)	File Location 2

**Integration 1 (SharePoint) Details:**

- SharePoint Site: https://ningepoint.sharepoint.com/sites/MS1teamsProcureDemo
- SharePoint List: Data
- SharePoint List ID: a4db7962-198f-47b1-9f99-699b7e5a5d3f
- SharePoint Folder: List Root
- SharePoint Folder ID: 0

**Integration 2 (Windows) Details:**

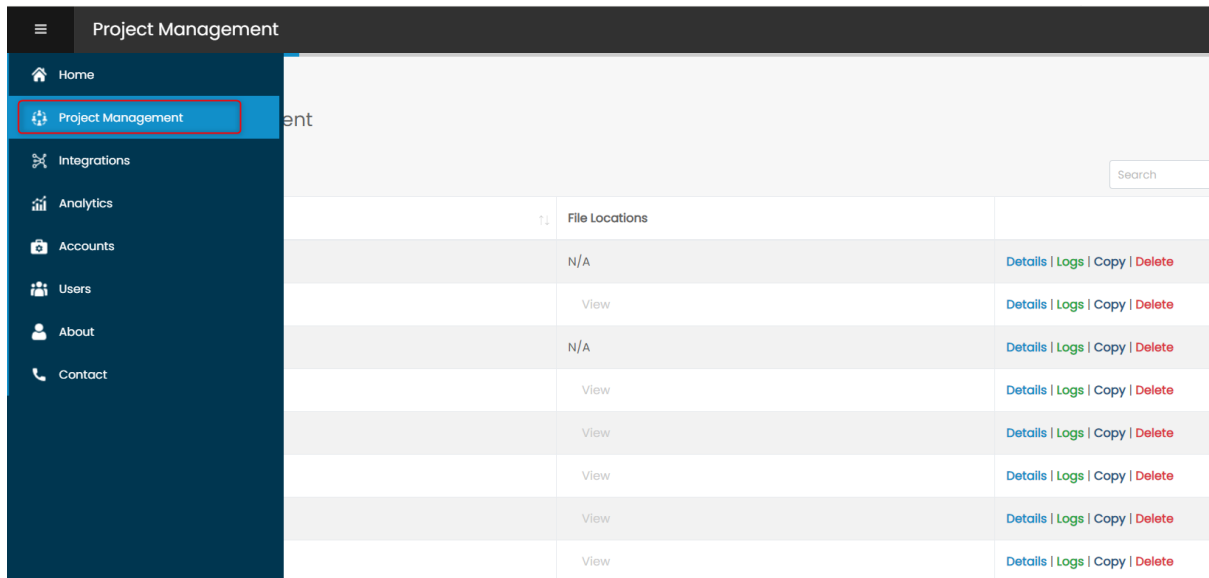
- Windows Directory Full Path: http://windows

Buttons: Back, Delete, Edit

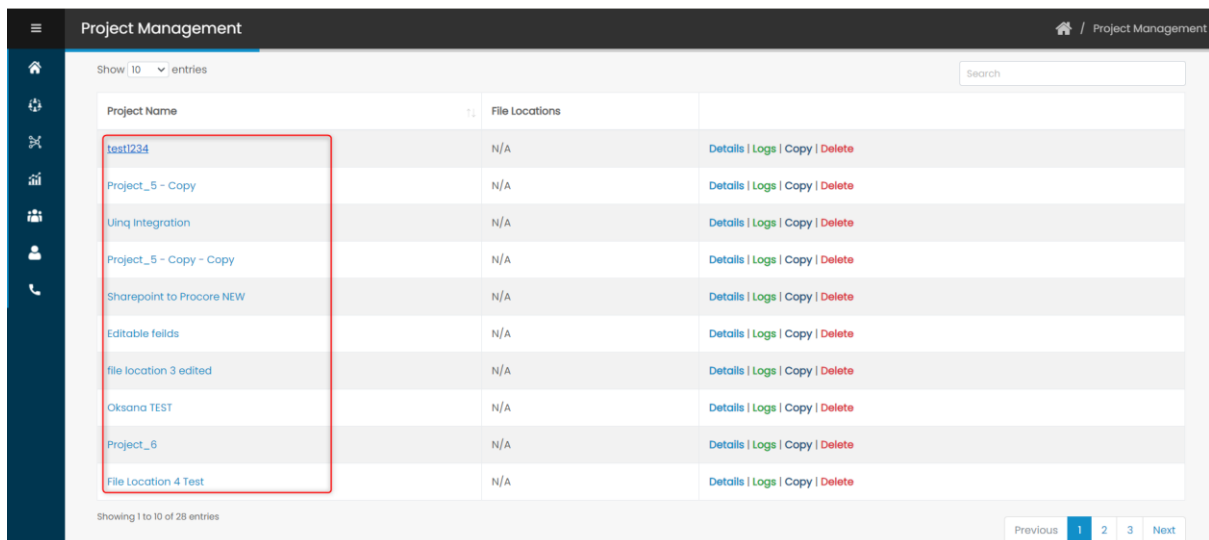


### 3.5 Activate a Sync:

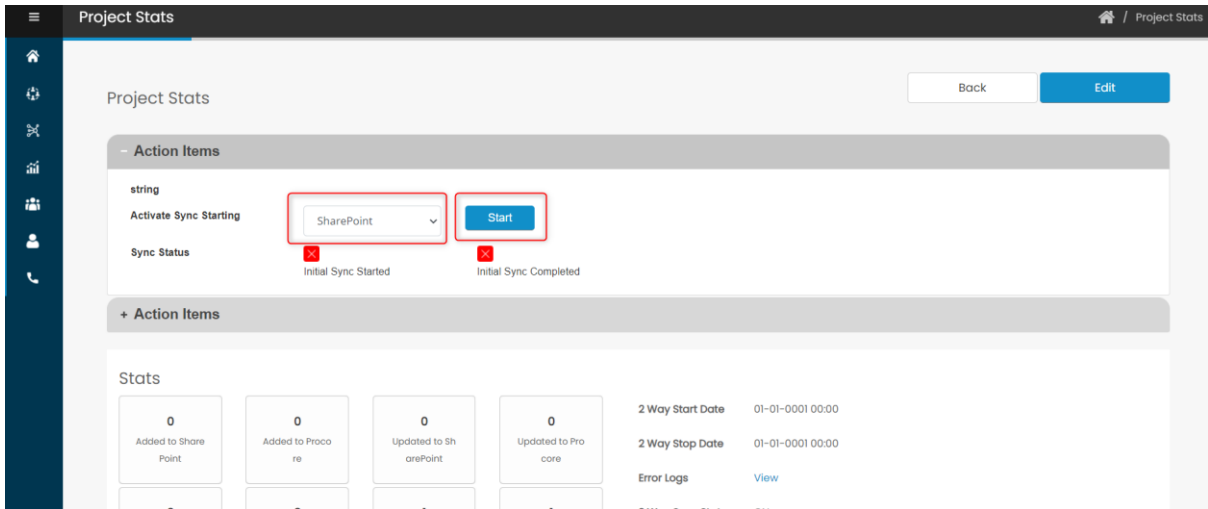
**Step 1:** Click on Project Management from the left navigation bar.



**Step 2:** Click on the name of the project in the project tables whose sync you want to activate.

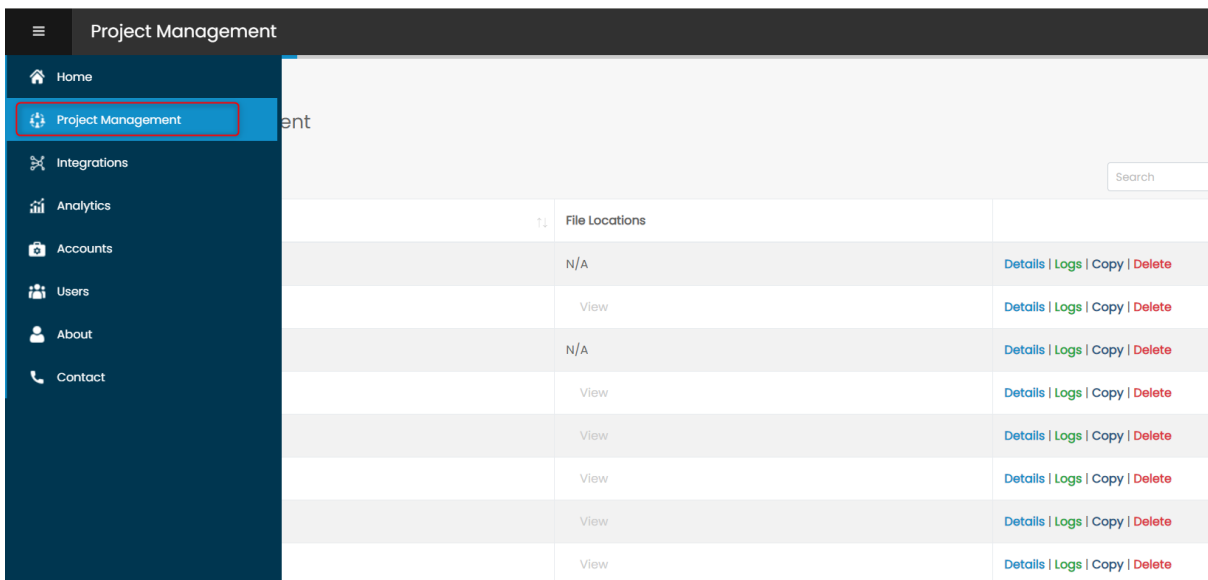


**Step 3:** the project stats screen is displayed. Select the endpoint for which you want to activate the sync and click on start.

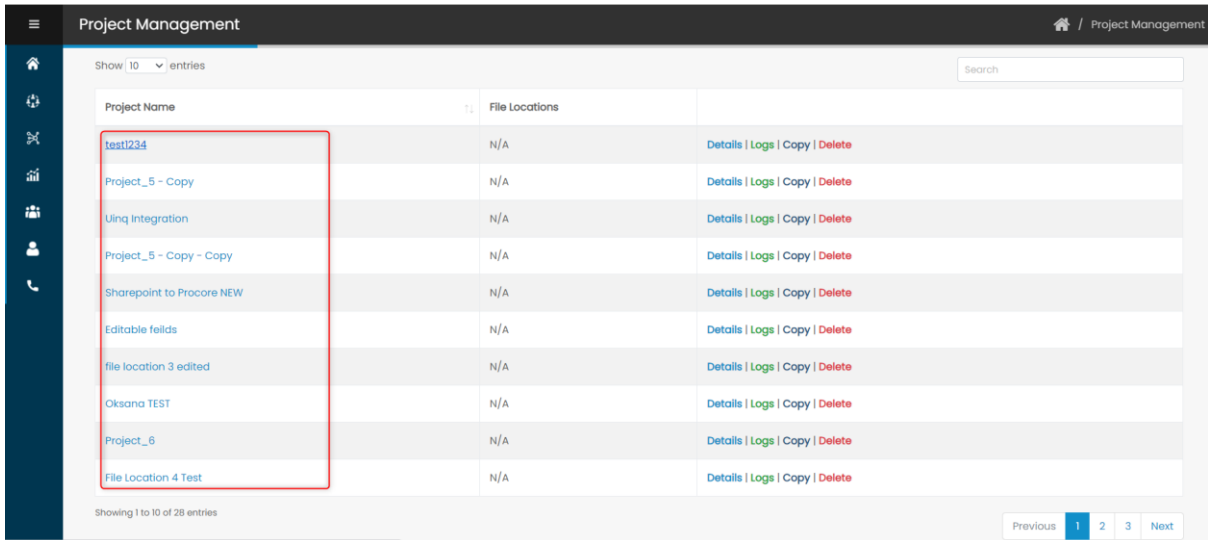


### 3.6 Deactivate a Sync:

**Step 1:** Click on Project Management from the left navigation bar.



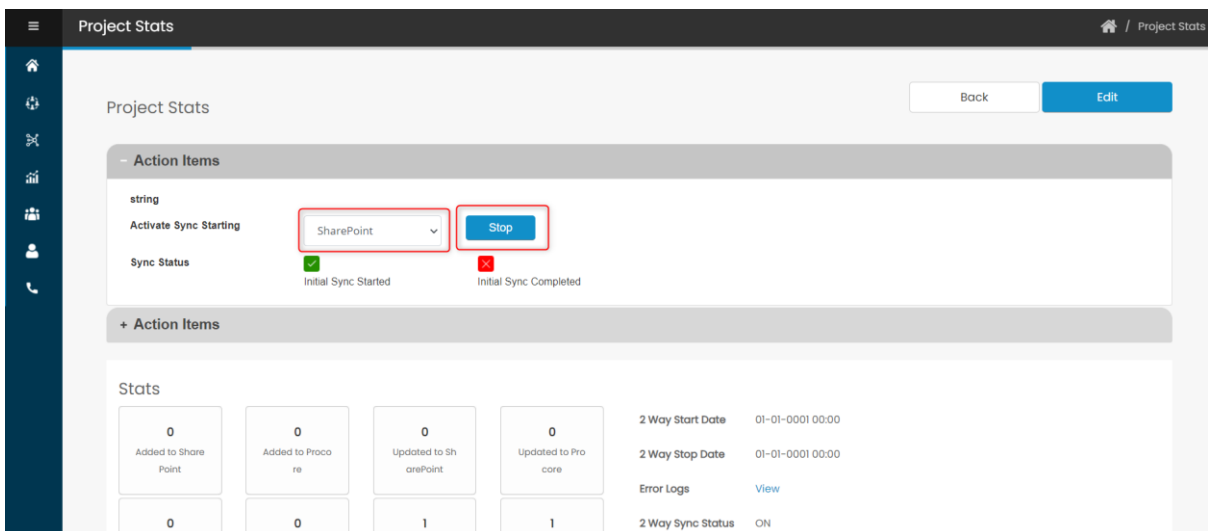
**Step 2:** Click on the name of the project in the project tables whose sync you want to deactivate.



The screenshot shows a 'Project Management' interface with a table of projects. The first row, 'test1234', is highlighted with a red box. The table has columns for 'Project Name', 'File Locations', and actions like 'Details', 'Logs', 'Copy', and 'Delete'. The 'File Locations' column for all rows shows 'N/A'. The interface includes a search bar, a 'Show 10 entries' dropdown, and pagination controls at the bottom right.

Project Name	File Locations	
test1234	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Project_5 - Copy	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Ulnq Integration	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Project_5 - Copy - Copy	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Sharepoint to Procore NEW	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Editable felids	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
file location 3 edited	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Oksana TEST	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
Project_6	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
File Location 4 Test	N/A	<a href="#">Details</a>   <a href="#">Logs</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

**Step 3:** the project stats screen is displayed. Select the endpoint for which you want to deactivate the sync and click on stop.



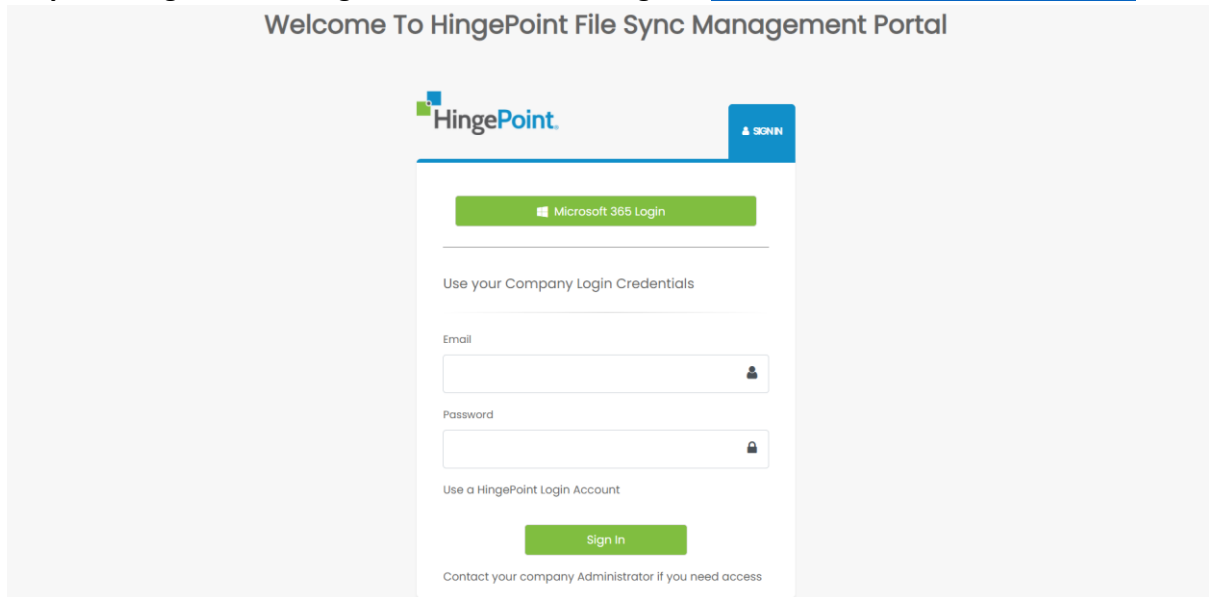
The screenshot shows the 'Project Stats' interface. It features a 'Back' button and an 'Edit' button. Under the 'Action Items' section, there is a dropdown menu set to 'SharePoint' and a 'Stop' button, both highlighted with red boxes. Below this, the 'Sync Status' is shown as 'Initial Sync Started' with a green checkmark. The 'Stats' section displays various metrics in a grid format, including 'Added to Share Point', 'Added to Procore', 'Updated to SharePoint', and 'Updated to Procore'. On the right, there are date fields for '2 Way Start Date' and '2 Way Stop Date', both set to '01-01-0001 00:00', and a '2 Way Sync Status' set to 'ON'.

Stats			
0	0	0	0
Added to Share Point	Added to Procore	Updated to SharePoint	Updated to Procore
0	0	1	1

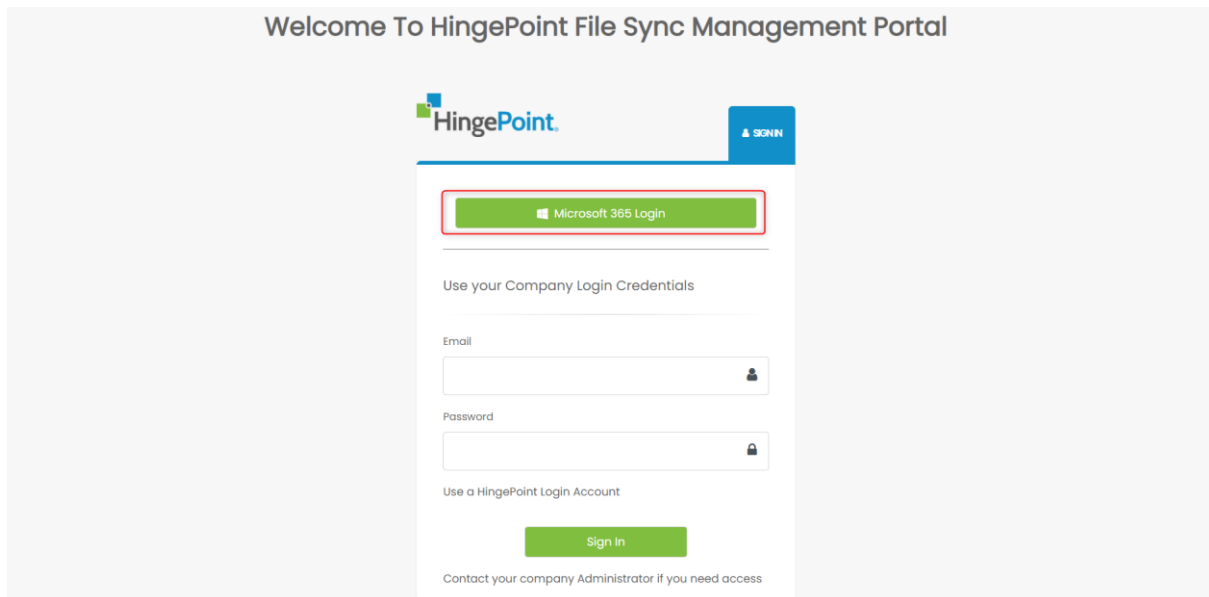
## 4. Accounts:

### 4.1 Create an Account:

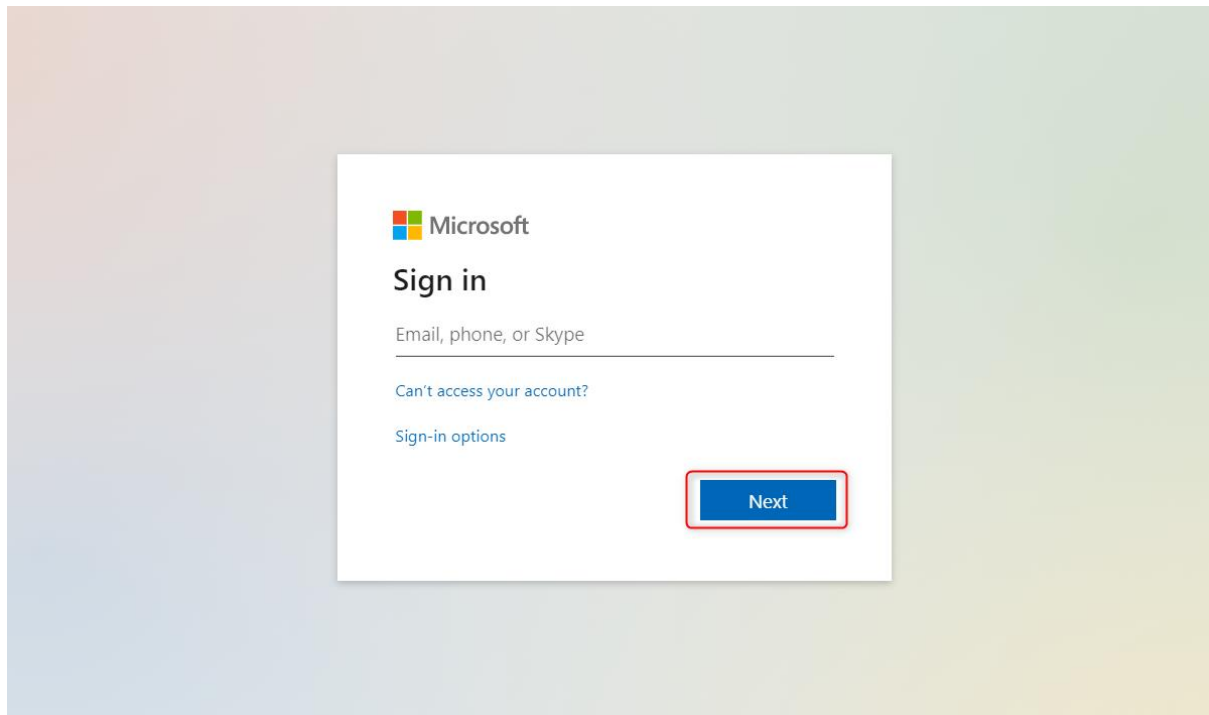
**Step 1:** Navigate to Management Portal site using the <https://filesync.hingepoint.com/>



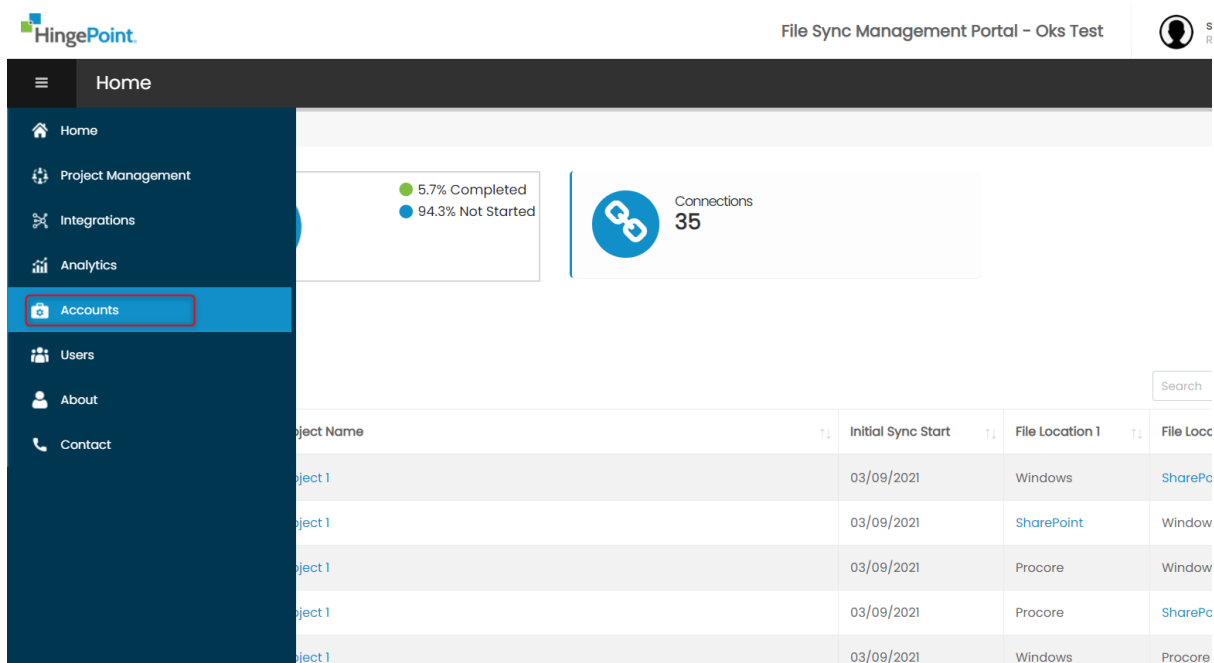
**Step 2:** Click on Use Microsoft button to login with your Microsoft account.



**Step 3:** Only Super Admin who has the access to the application can create Accounts. Enter your super admin credentials and click on next.



**Step 4:** Navigates to the homepage. Select "Accounts" from the left navigation menu.



**Step 5:** Navigates to the Accounts page. Click on create to create an account.

Accounts

Accounts

Show 10 entries

Search

Name	Company Name	SSO Domain	Email	Status	
	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">Bryce Finnerty</a>	Sandbox Project	hingepoint.com	hingepoint-sync-sandbox@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">dev team</a>	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">dev.team dev.team</a>	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">dev.team dev.team</a>	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">dev!!! team!!!</a>	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">Michael Shepherd</a>	Rogers and O'Brien	r-o.com	MShepherd@r-o.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">Oksana Test</a>	Oks Test	hingepoint.com	ashpak@scnsoft.com	Inactive	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">Testing Stats</a>	Testing stats	scnsoft.com	ashpak@scnsoft.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>

[Create New](#)

**Step 6:** Enter the required details and click on save

HingePoint

File Sync Management Portal - Oks Test

syed.shadab@star-knowledge.org  
Role: admin

Create New Account

Create New Account

Company Name \*

First Name \*

Last Name \*

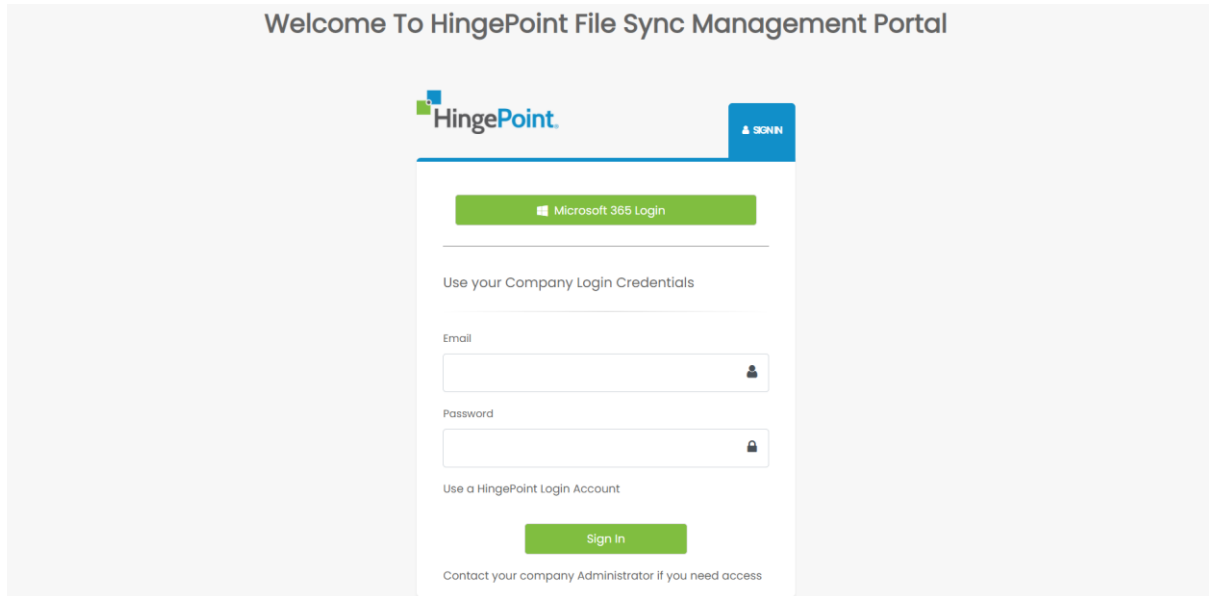
SSO Domain \*

Email \*

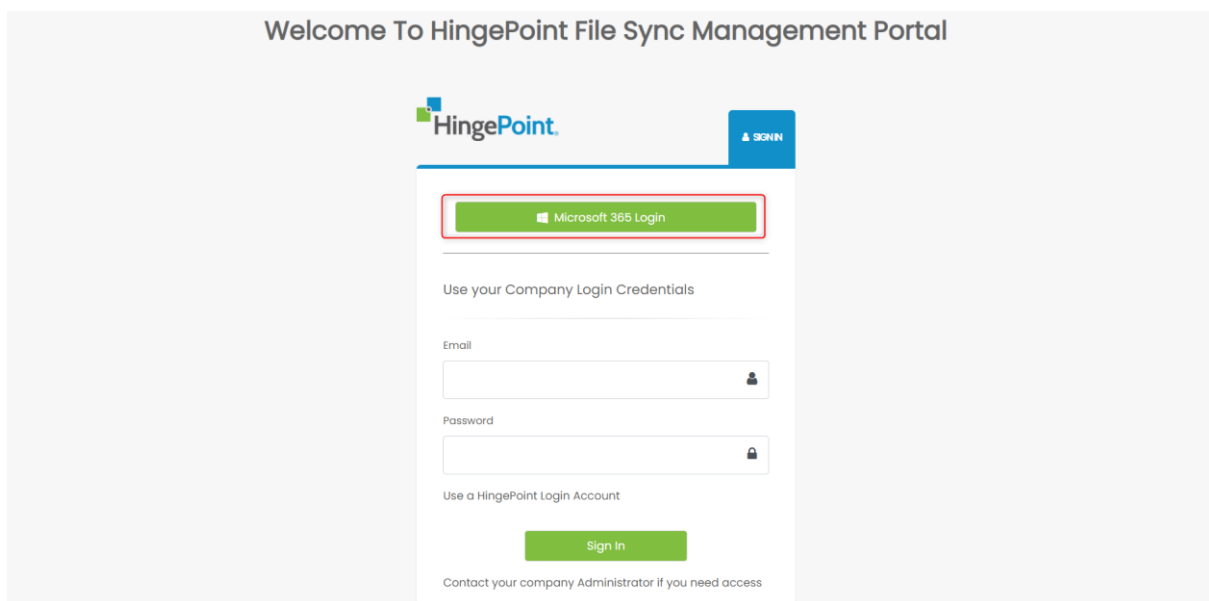
[Back](#) [Save](#)

## 4.2 Edit an Account:

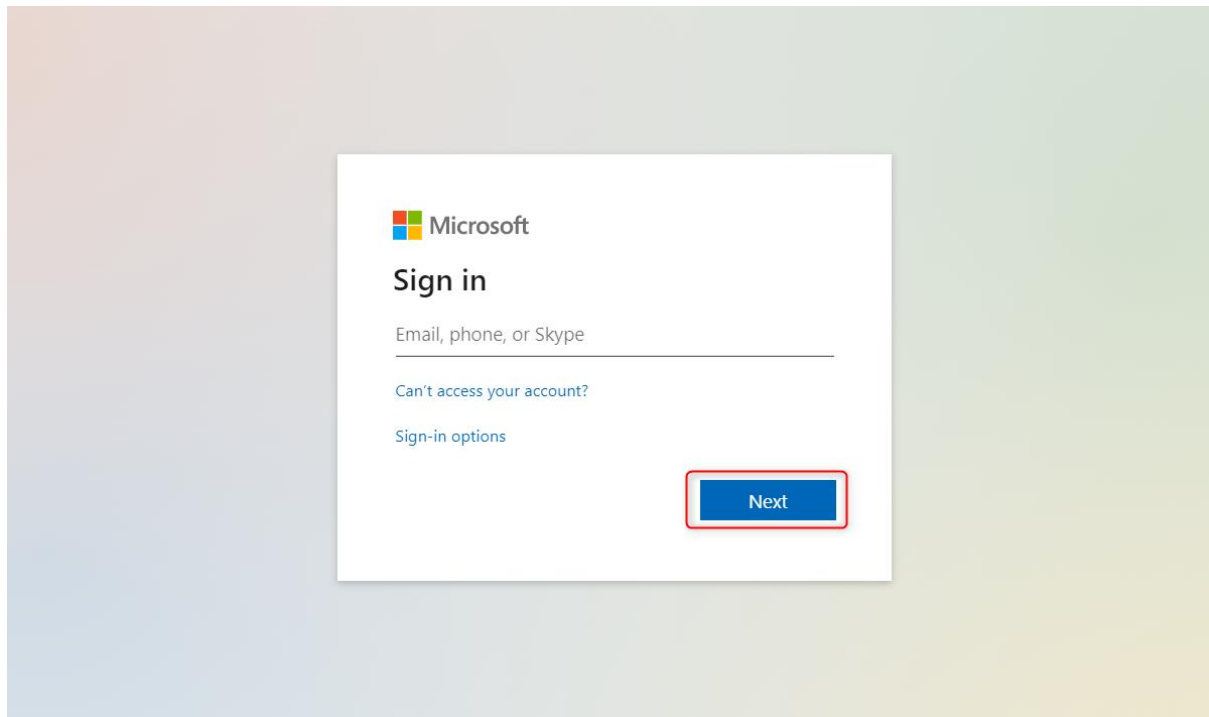
**Step 1:** Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



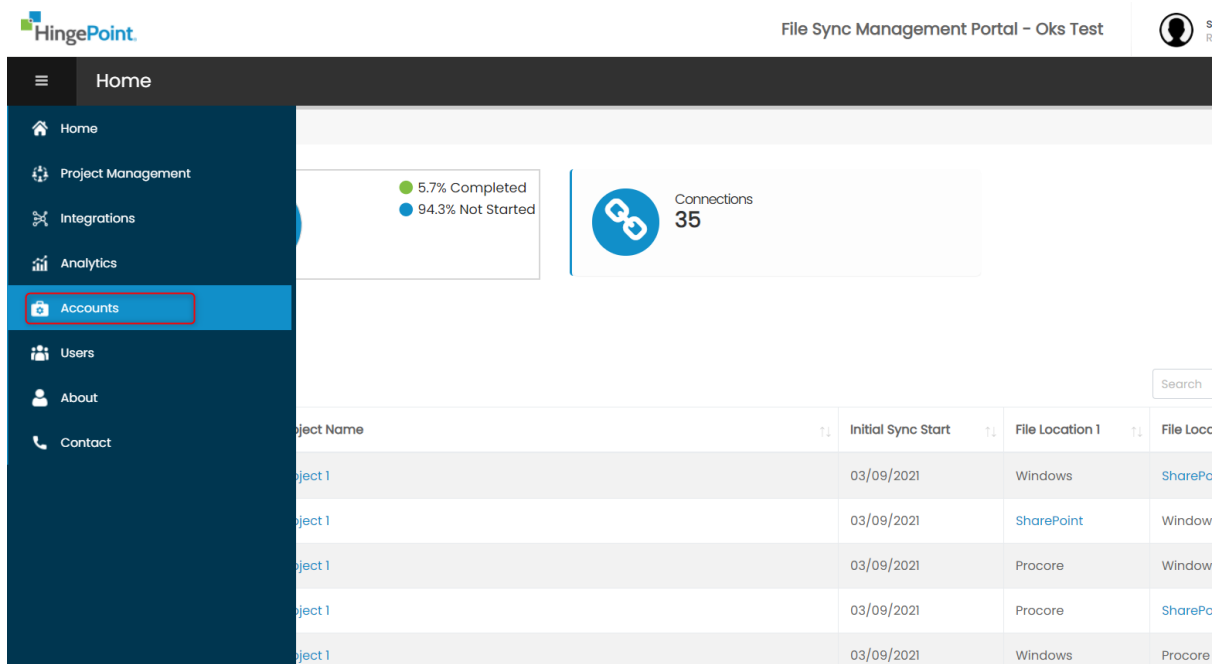
**Step 2:** Click on Use Microsoft button to login with your Microsoft account.



**Step 3:** Only Super Admin who has the access to the application can edit Accounts. Enter your super admin credentials and click on next.

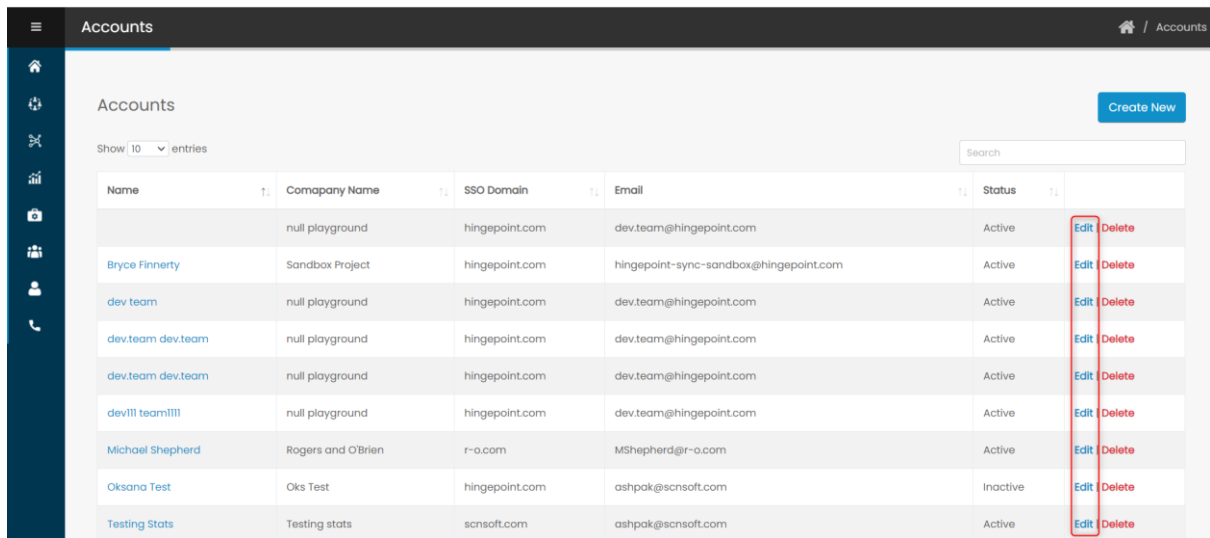


**Step 4:** Navigates to the homepage. Select "Accounts" from the left navigation menu.

A screenshot of the HingePoint File Sync Management Portal homepage. The page has a dark blue header with the HingePoint logo on the left and the text "File Sync Management Portal - Oks Test" on the right. Below the header is a dark blue navigation menu with several items: Home, Project Management, Integrations, Analytics, Accounts, Users, About, and Contact. The "Accounts" item is highlighted with a red rectangular border. The main content area shows a dashboard with two summary cards: one for completion status (5.7% Completed, 94.3% Not Started) and another for connections (35). Below these cards is a table with columns for Object Name, Initial Sync Start, File Location 1, and File Location 2. The table contains six rows of data, all with "Object 1" in the first column and "03/09/2021" in the second column. The File Location 1 and File Location 2 columns contain various values like "Windows", "SharePoint", and "Procure".



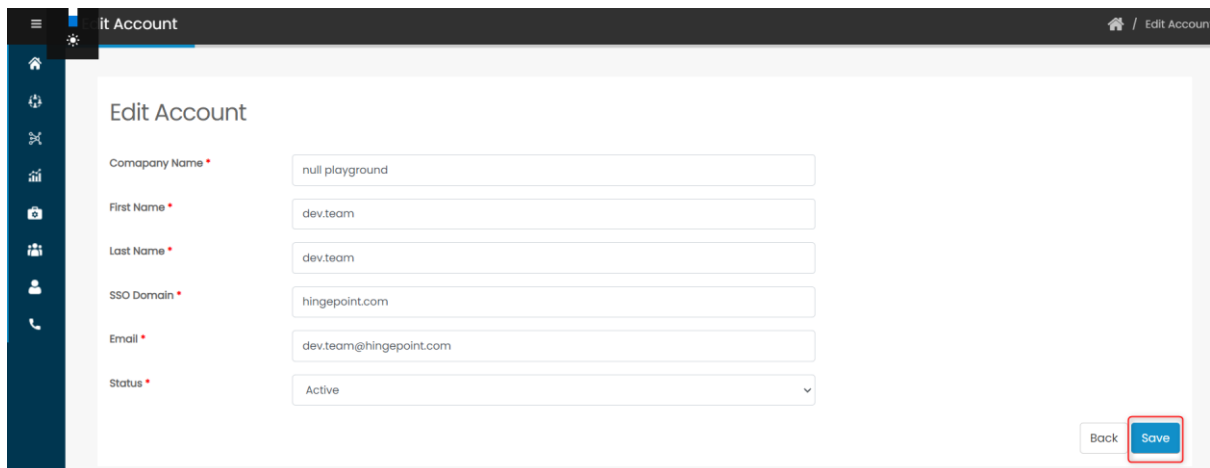
**Step 5:** Navigates to the Accounts page. Click on edit button of the account you want to edit.



The screenshot shows the 'Accounts' page in a web application. The page has a dark header with a home icon and the text 'Accounts'. A sidebar on the left contains various navigation icons. The main content area is titled 'Accounts' and includes a 'Create New' button, a search bar, and a table of accounts. The table has columns for Name, Company Name, SSO Domain, Email, and Status. The 'Edit' button for the first account is highlighted with a red box.

Name	Company Name	SSO Domain	Email	Status	
	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
Bryce Finnerty	Sandbox Project	hingepoint.com	hingepoint-sync-sandbox@hingepoint.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
dev team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
dev.team dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
dev.team dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
dev!!! team!!!!	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
Michael Shepherd	Rogers and O'Brien	r-o.com	MShepherd@r-o.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>
Oksana Test	Oks Test	hingepoint.com	ashpak@scnsoft.com	Inactive	<a href="#">Edit</a> <a href="#">Delete</a>
Testing Stats	Testing stats	scnsoft.com	ashpak@scnsoft.com	Active	<a href="#">Edit</a> <a href="#">Delete</a>

**Step 6:** Update the fields and click on save.



The screenshot shows the 'Edit Account' form in a web application. The page has a dark header with a home icon and the text 'Edit Account'. A sidebar on the left contains various navigation icons. The main content area is titled 'Edit Account' and contains several input fields for 'Company Name', 'First Name', 'Last Name', 'SSO Domain', 'Email', and 'Status'. The 'Save' button is highlighted with a red box.

Company Name \*

First Name \*

Last Name \*

SSO Domain \*

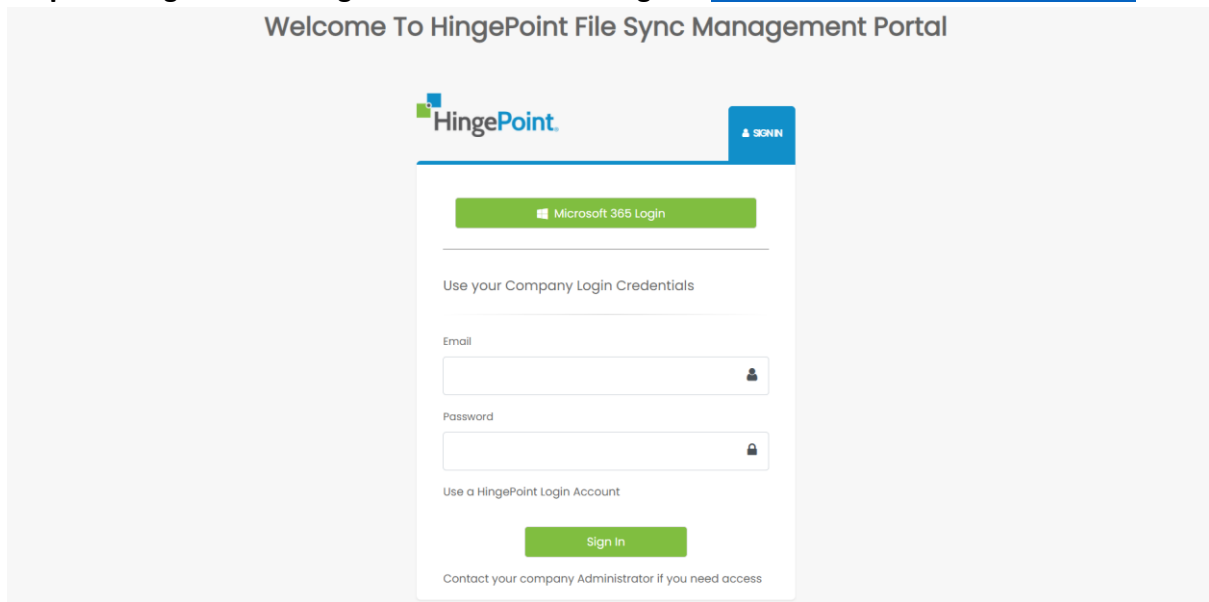
Email \*

Status \*

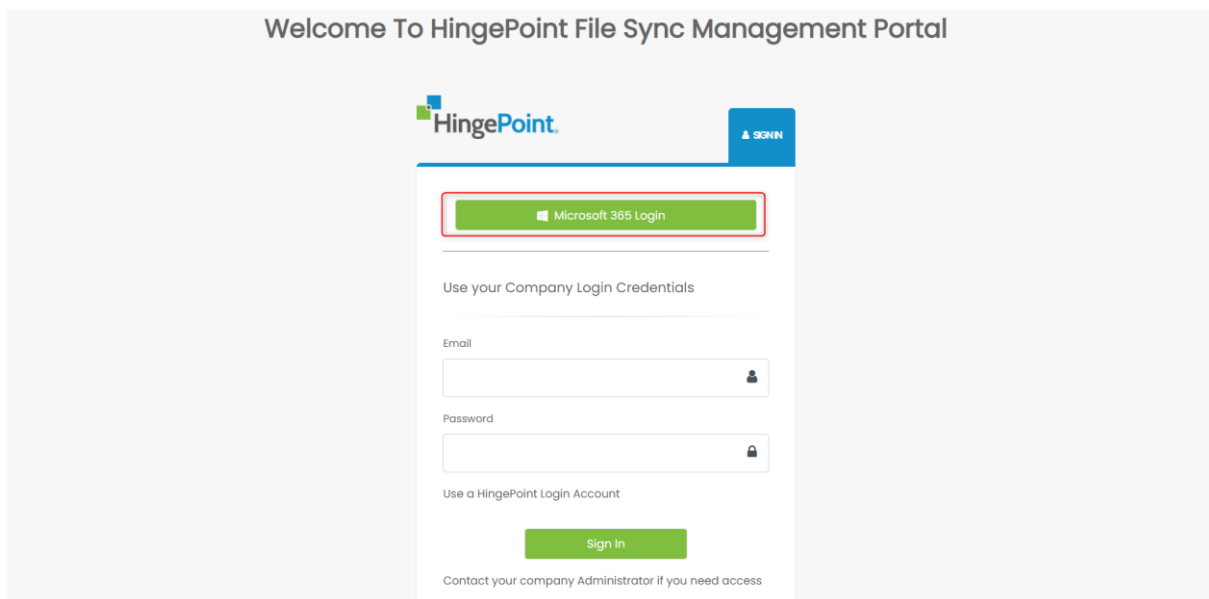
[Back](#) [Save](#)

### 4.3 View an Account:

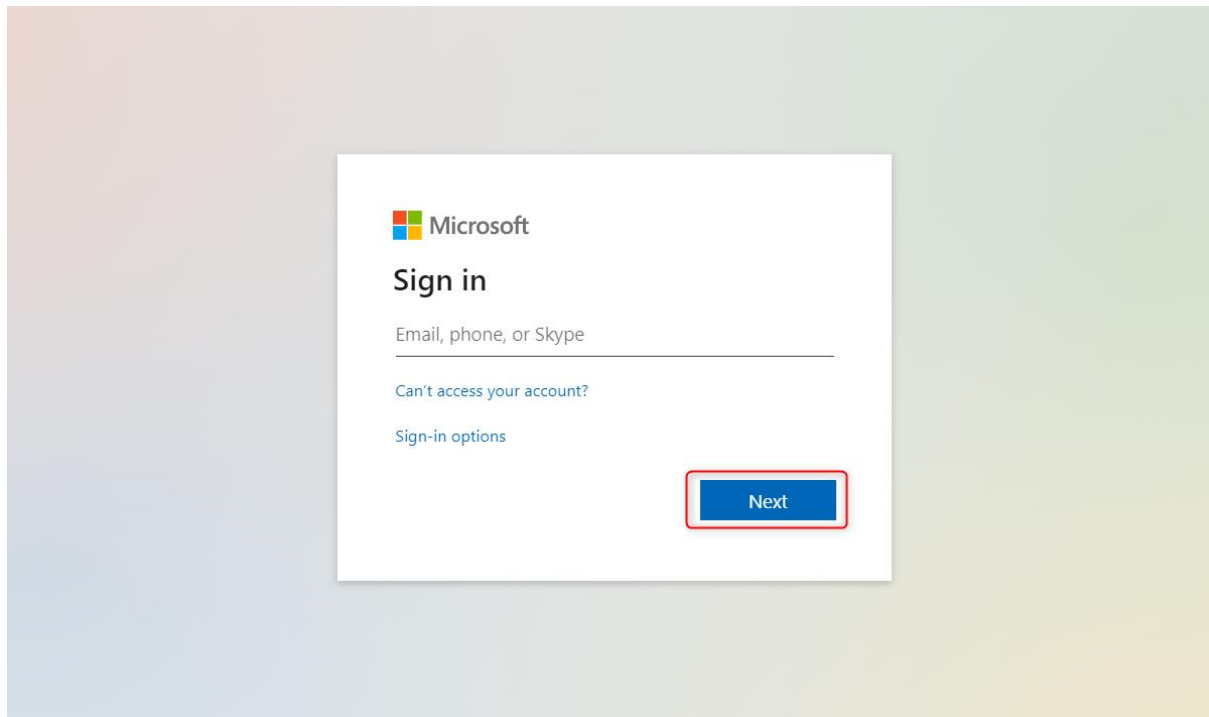
**Step 1:** Navigate to Management Portal site using the <https://filesync.hingepoint.com/>



**Step 2:** Click on Use Microsoft button to login with your Microsoft account.



**Step 3:** Only Super Admin who has the access to the application can view Accounts. Enter your super admin credentials and click on next.



**Step 4:** Navigates to the homepage. Select "Accounts" from the left navigation menu.

A screenshot of the HingePoint File Sync Management Portal homepage. The page has a dark blue header with the HingePoint logo on the left and the text "File Sync Management Portal - Oks Test" on the right. Below the header is a dark blue navigation menu with several items: Home, Project Management, Integrations, Analytics, Accounts, Users, About, and Contact. The "Accounts" item is highlighted with a red rectangular border. The main content area shows a dashboard with two summary cards: one for completion status (5.7% Completed, 94.3% Not Started) and another for connections (35). Below these cards is a table with columns for Project Name, Initial Sync Start, File Location 1, and File Location 2. The table contains six rows of data, all with "Project 1" in the first column and "03/09/2021" in the second column. The File Location 1 and File Location 2 columns contain various values like "Windows", "SharePoint", and "Procure".

**Step 5:** Navigates to the Accounts page. Click on account name of the account you want to view.

Name	Company Name	SSO Domain	Email	Status	
	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
Bryce Finnerty	Sandbox Project	hingepoint.com	hingepoint-sync-sandbox@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
dev team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
dev.team dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
dev.team dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
dev!!! team!!!!	null playground	hingepoint.com	dev.team@hingepoint.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
Michael Shepherd	Rogers and O'Brien	r-a.com	MShepherd@r-a.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>
Oksana Test	Oks Test	hingepoint.com	ashpak@scnsoft.com	Inactive	<a href="#">Edit</a>   <a href="#">Delete</a>
Testing Stats	Testing stats	scnsoft.com	ashpak@scnsoft.com	Active	<a href="#">Edit</a>   <a href="#">Delete</a>

**Step 6:** The Details page is displayed.

**View Client**

Company Name: null playground

Name: dev team

SSO Domain: hingepoint.com

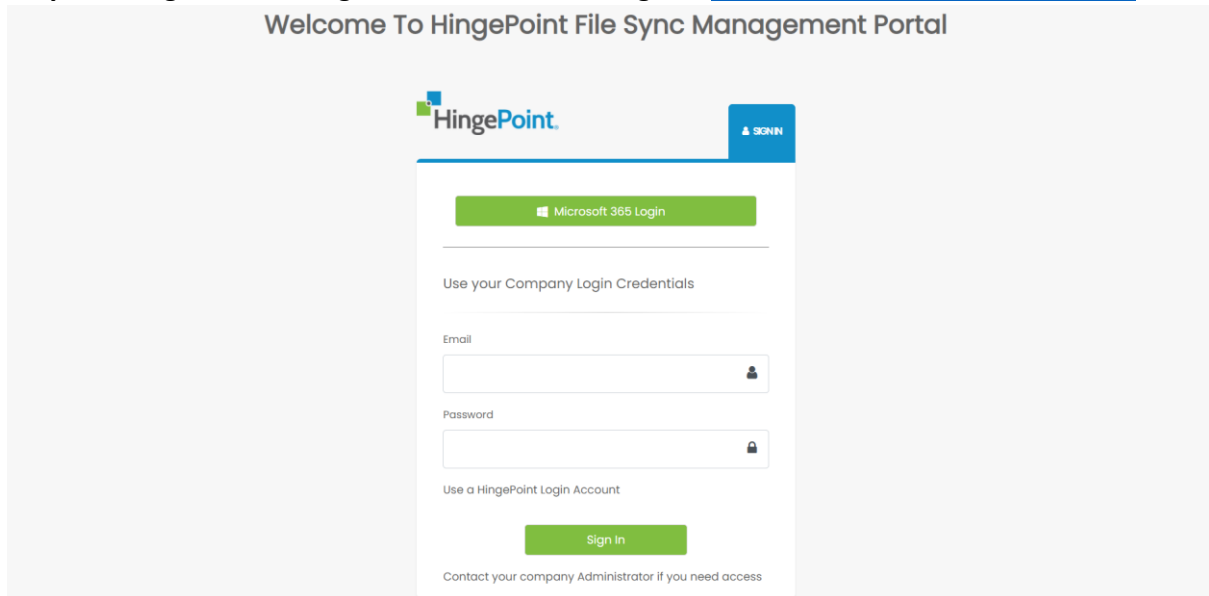
Email: dev.team@hingepoint.com

Status: Active

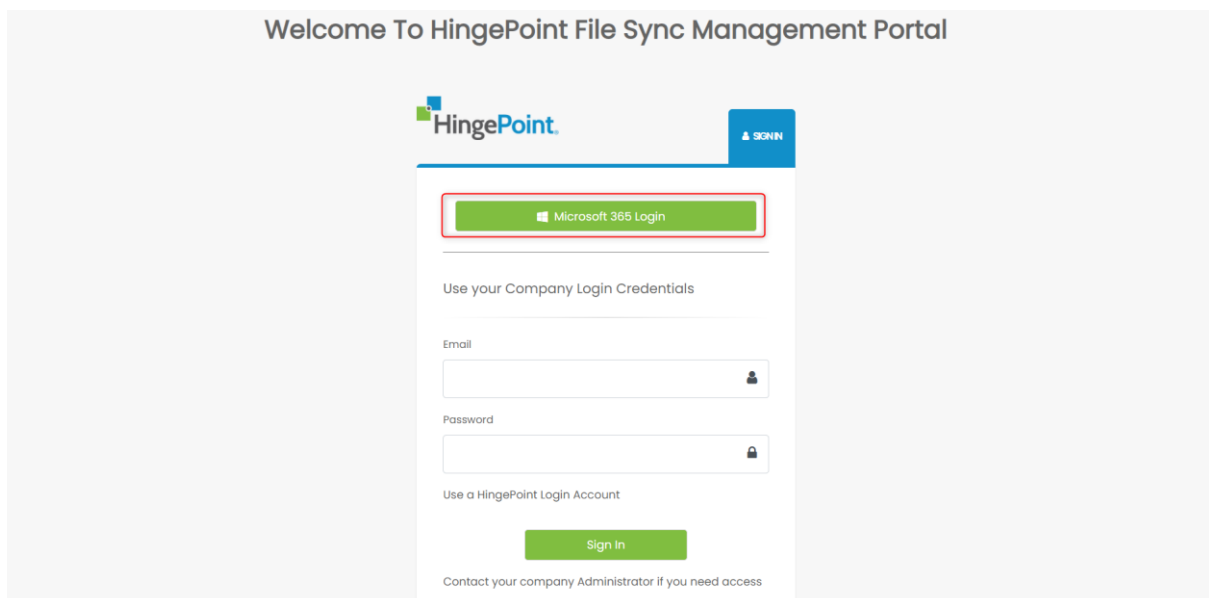
[Back](#) [Delete](#) [Edit](#)

#### 4. Delete an Account:

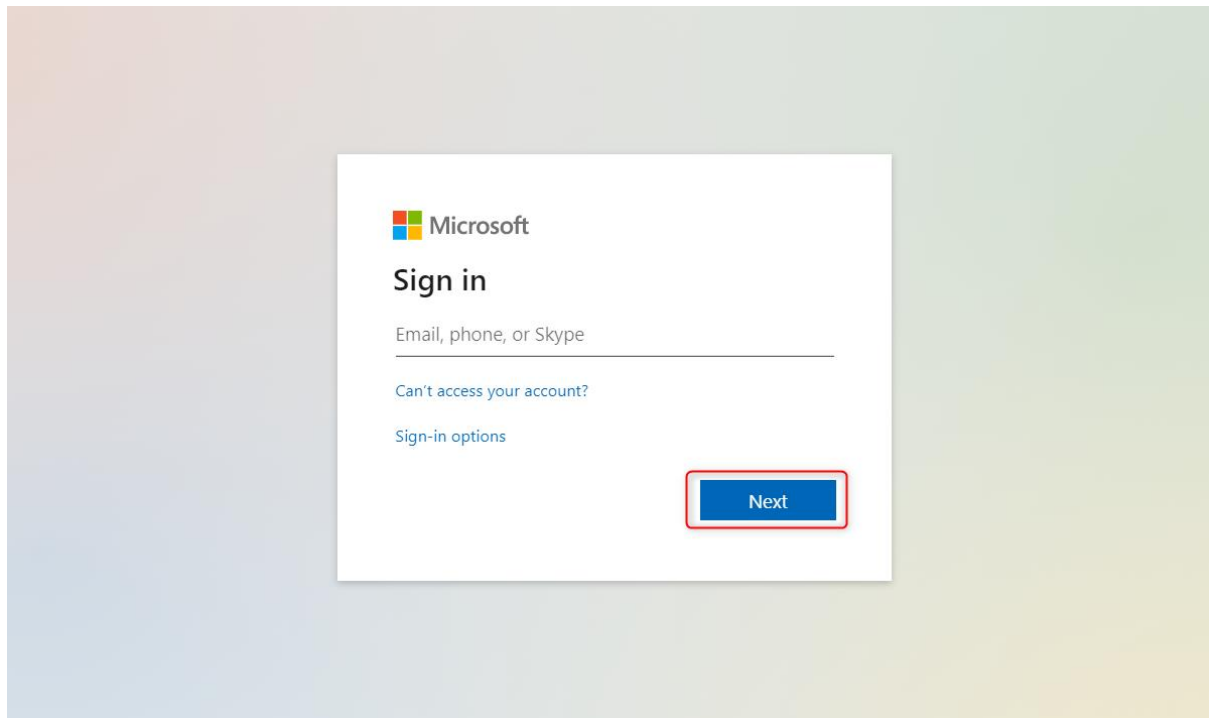
**Step 1:** Navigate to Management Portal site using the <https://filesync.hingepoint.com/>



**Step 2:** Click on Use Microsoft button to login with your Microsoft account.



**Step 3:** Only Super Admin who has the access to the application can delete Accounts. Enter your super admin credentials and click on next.

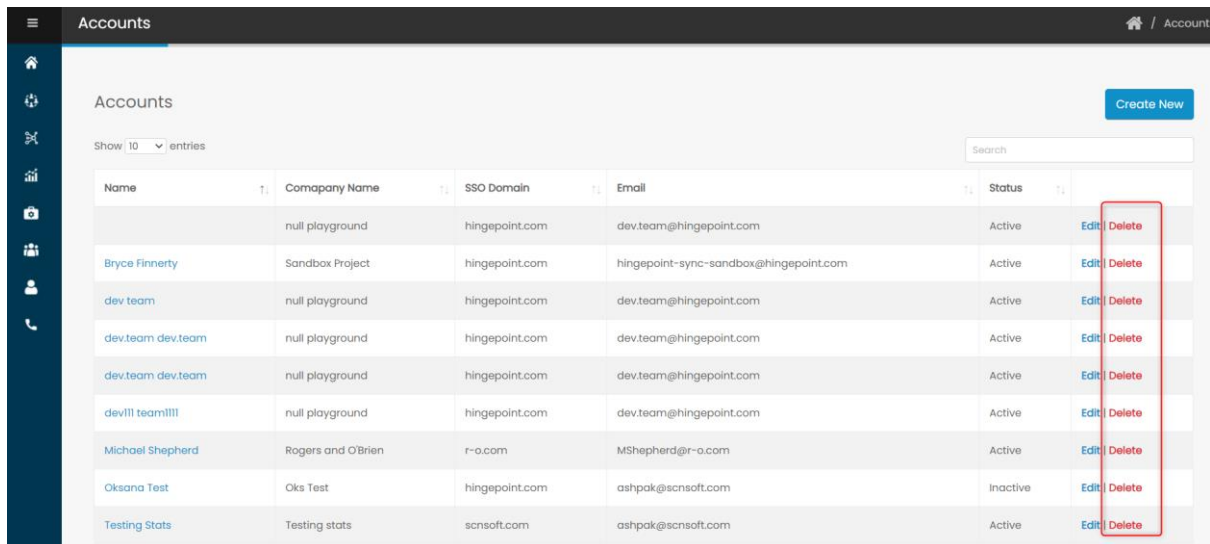


**Step 4:** Navigates to the homepage. Select "Accounts" from the left navigation menu.

A screenshot of the HingePoint File Sync Management Portal homepage. The top left corner shows the HingePoint logo. The top right corner displays "File Sync Management Portal - Oks Test" and a user profile icon. A dark navigation bar at the top contains a hamburger menu icon and the word "Home". A dark blue sidebar navigation menu is open on the left, listing "Home", "Project Management", "Integrations", "Analytics", "Accounts", "Users", "About", and "Contact". The "Accounts" item is highlighted with a red rectangular border. The main content area shows a dashboard with two summary cards: one for completion status (5.7% Completed, 94.3% Not Started) and another for "Connections 35". Below these cards is a table with columns for "Project Name", "Initial Sync Start", "File Location 1", and "File Location 2". The table contains six rows of data, all with "Project 1" in the first column. A search bar is located in the top right of the table area.

Project Name	Initial Sync Start	File Location 1	File Location 2
Project 1	03/09/2021	Windows	SharePoint
Project 1	03/09/2021	SharePoint	Windows
Project 1	03/09/2021	Procore	Windows
Project 1	03/09/2021	Procore	SharePoint
Project 1	03/09/2021	Windows	Procore

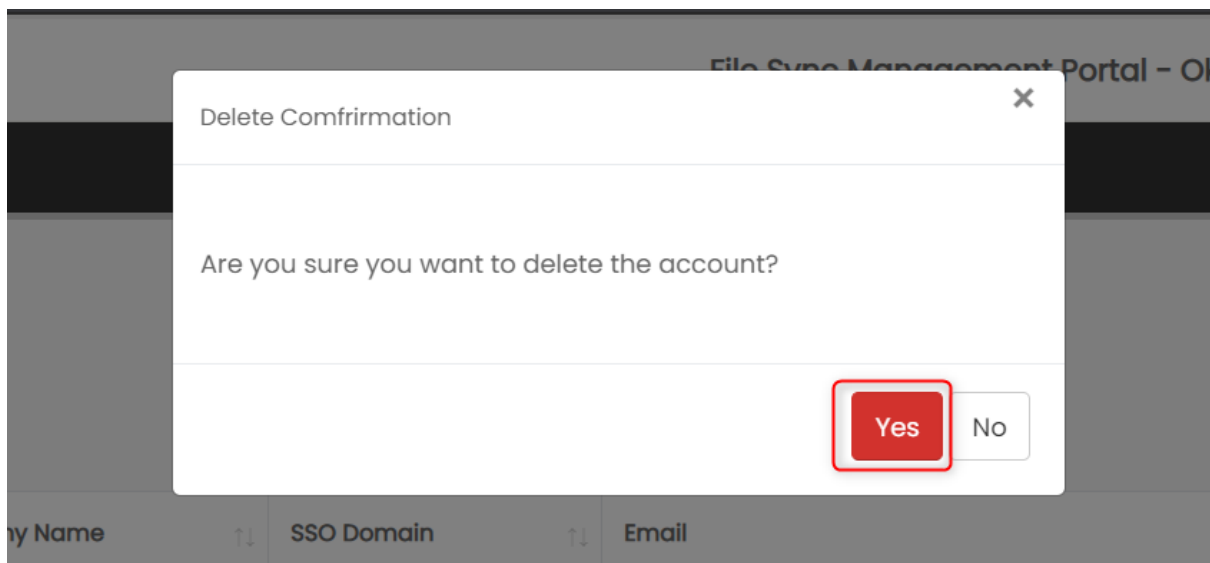
**Step 5:** Navigates to the Accounts page. Click on delete button of the account you want to delete.



The screenshot shows the 'Accounts' page in a web application. The page has a dark sidebar on the left and a main content area. The main content area has a header with 'Accounts' and a 'Create New' button. Below the header is a search bar and a 'Show 10 entries' dropdown. The main content is a table with the following columns: Name, Company Name, SSO Domain, Email, Status, and actions (Edit and Delete). The 'dev.team' row is highlighted, and its 'Delete' button is circled in red.

Name	Company Name	SSO Domain	Email	Status	Actions
	null playground	hingepoint.com	dev.team@hingepoint.com	Active	Edit Delete
Bryce Finnerty	Sandbox Project	hingepoint.com	hingepoint-sync-sandbox@hingepoint.com	Active	Edit Delete
dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	Edit Delete
dev.team dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	Edit Delete
dev.team dev.team	null playground	hingepoint.com	dev.team@hingepoint.com	Active	Edit Delete
dev!!! team!!!!	null playground	hingepoint.com	dev.team@hingepoint.com	Active	Edit Delete
Michael Shepherd	Rogers and O'Brien	r-o.com	MShepherd@r-o.com	Active	Edit Delete
Oksana Test	Oks Test	hingepoint.com	ashpak@scnsoft.com	Inactive	Edit Delete
Testing Stats	Testing stats	scnsoft.com	ashpak@scnsoft.com	Active	Edit Delete

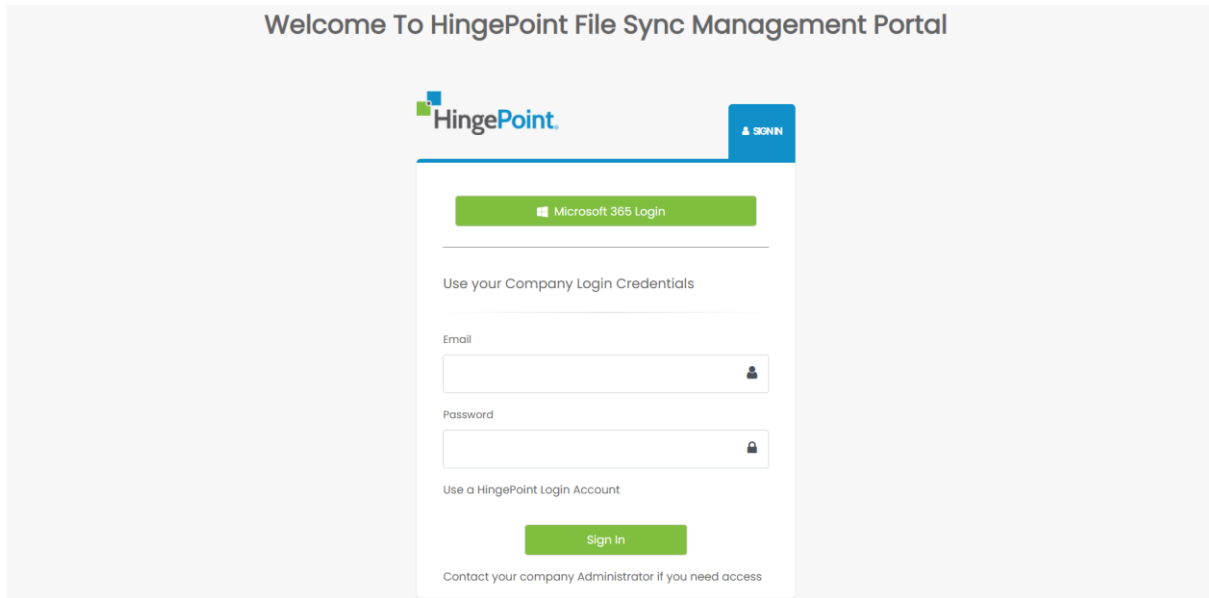
**Step 6:** Click yes to delete the account.



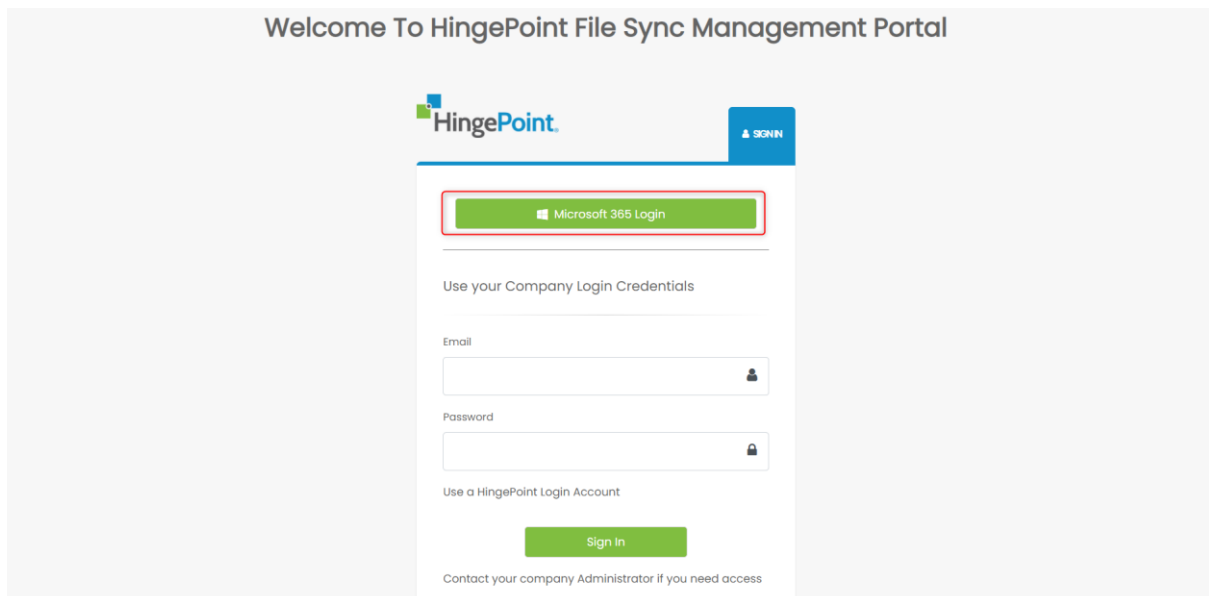
## 5. Users:

### 5.1 Create a User:

**Step 1:** Navigate to Management Portal site using the <https://filesync.hingepoint.com/>

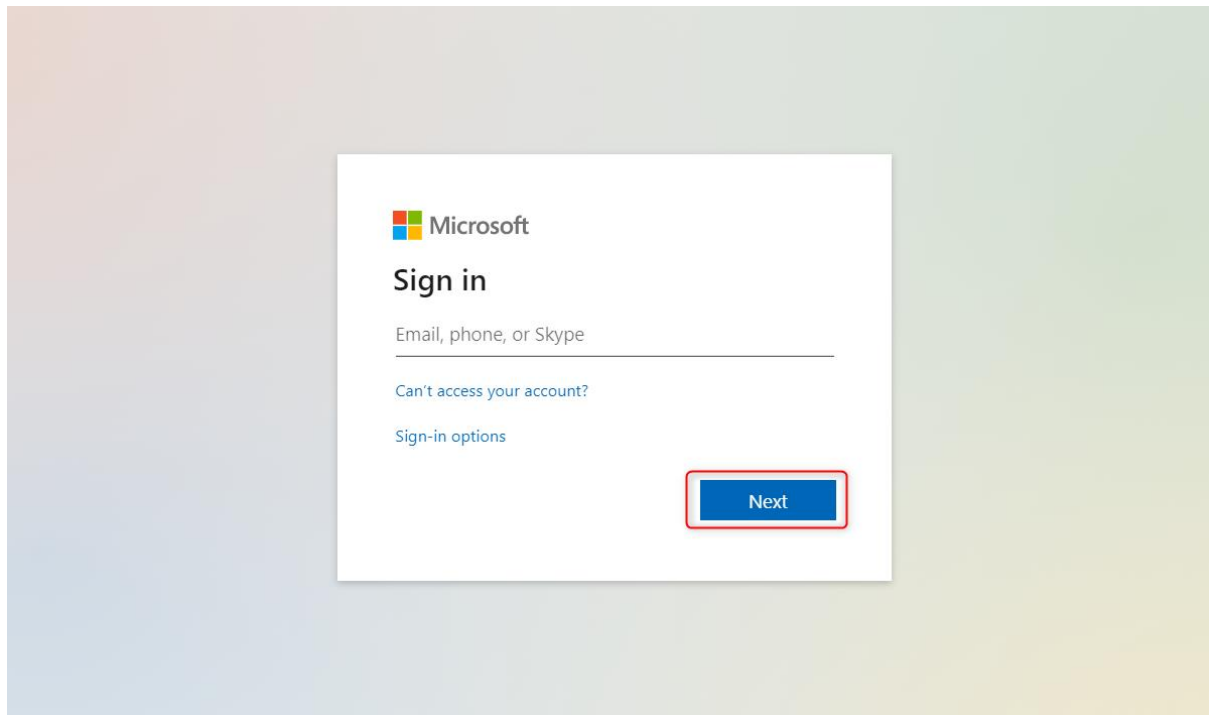


**Step 2:** Click on Use Microsoft button to login with your Microsoft account.

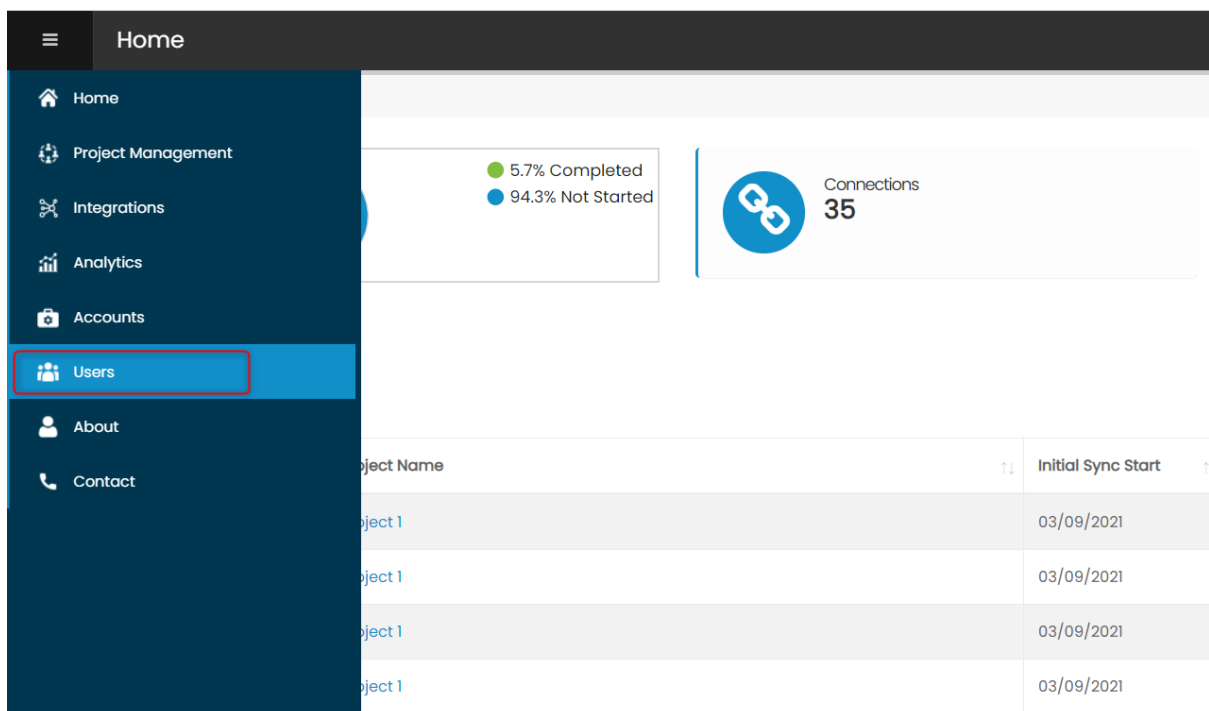




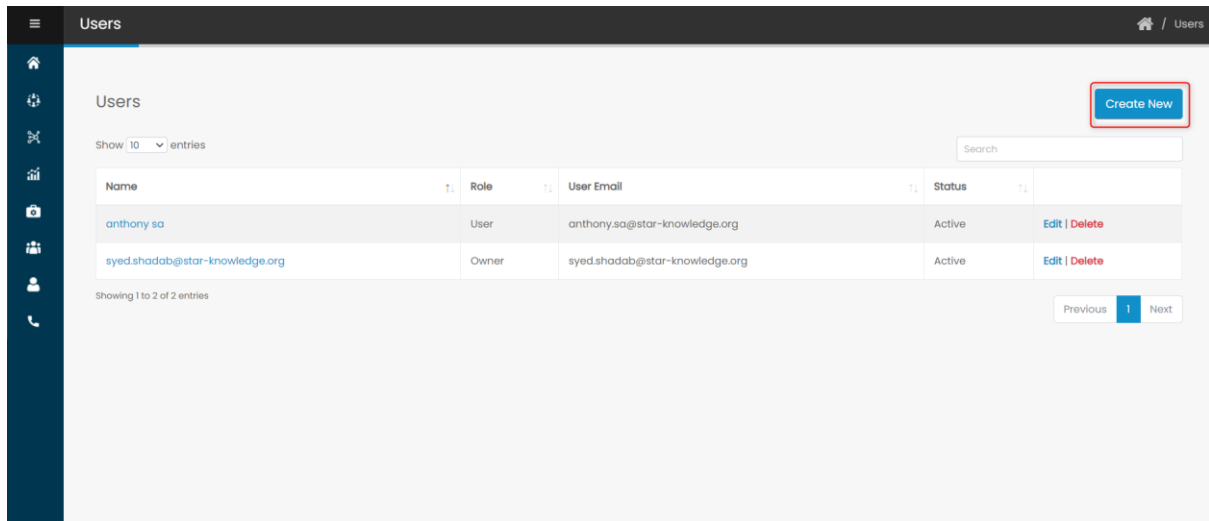
**Step 3:** Only Super Admin and Account Admin who has the access to the application can create Users. Enter your super admin or account admin credentials and click on next.



**Step 4:** Navigates to the homepage. Select "Users" from the left navigation menu.



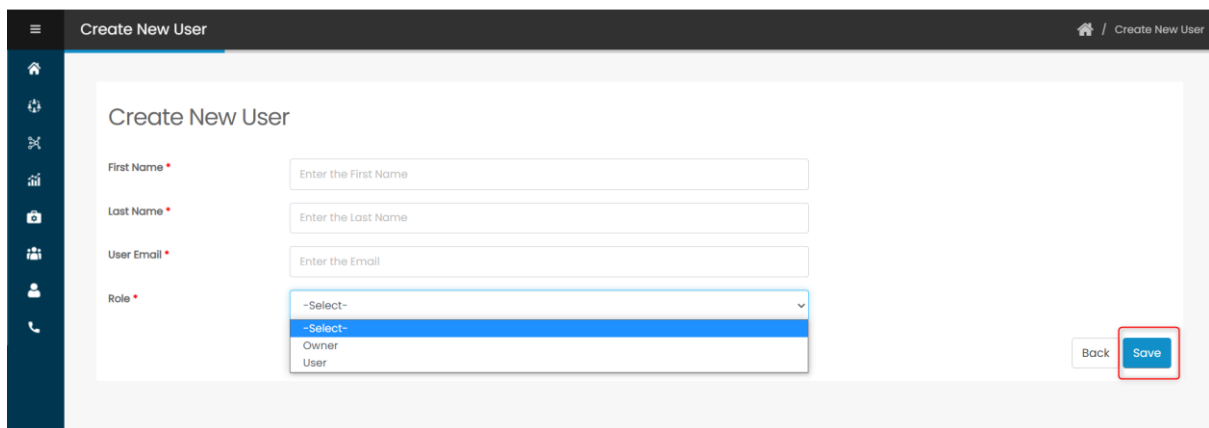
**Step 5:** Navigates to the User page. Click on create to create a user.



**Step 6:** Enter the required details and click on save

**NOTE:**

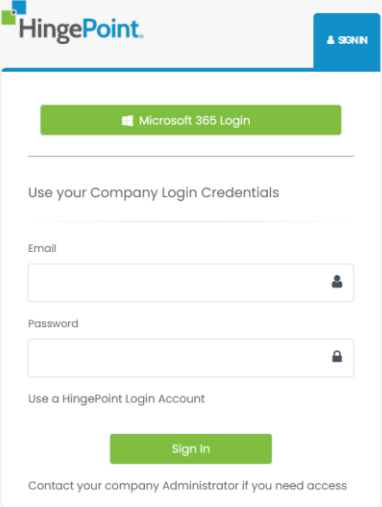
- 1 Selecting Role as admin will create user with Account Admin role.**
- 2. Selecting Role as User will create user with Account user role.**



## 4.2 Edit a User:

**Step 1:** Navigate to Management Portal site using the <https://filesync.hingepoint.com/>

Welcome To HingePoint File Sync Management Portal



HingePoint

Microsoft 365 Login

Use your Company Login Credentials

Email

Password

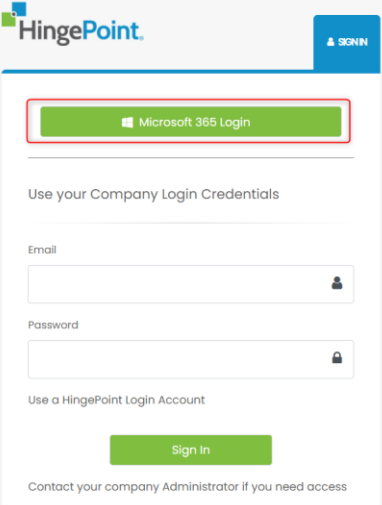
Use a HingePoint Login Account

Sign In

Contact your company Administrator if you need access

**Step 2:** Click on Use Microsoft button to login with your Microsoft account.

Welcome To HingePoint File Sync Management Portal



HingePoint

Microsoft 365 Login

Use your Company Login Credentials

Email

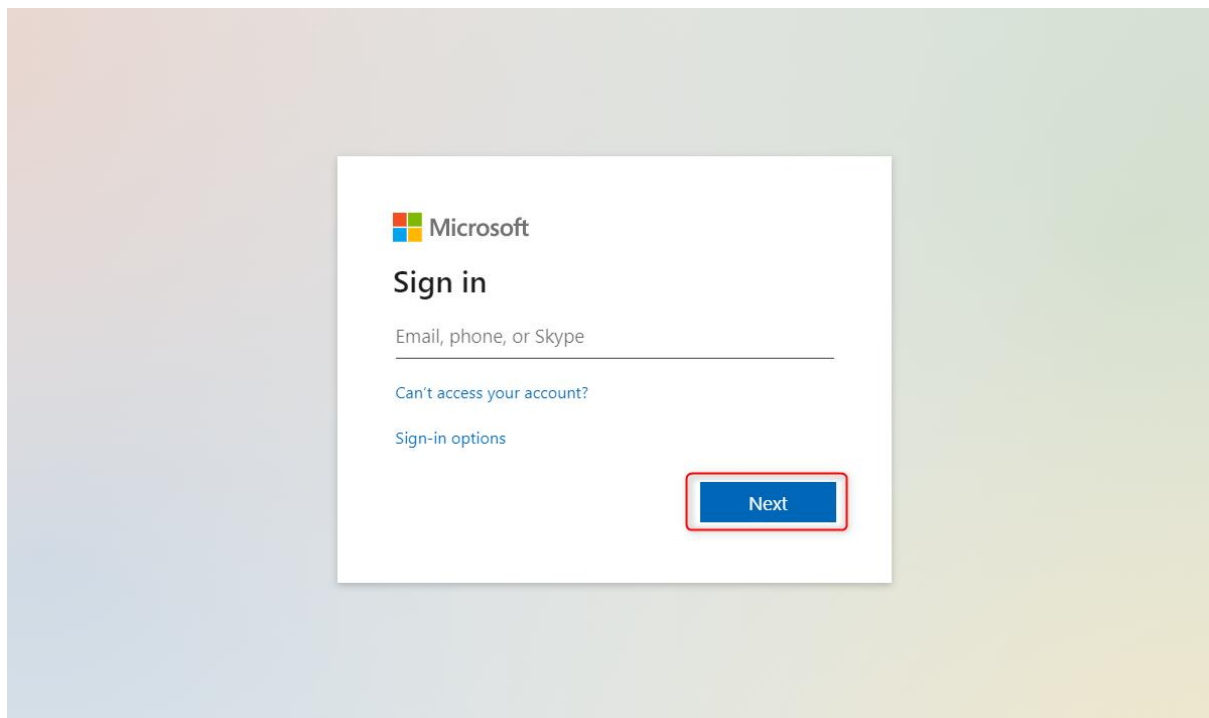
Password

Use a HingePoint Login Account

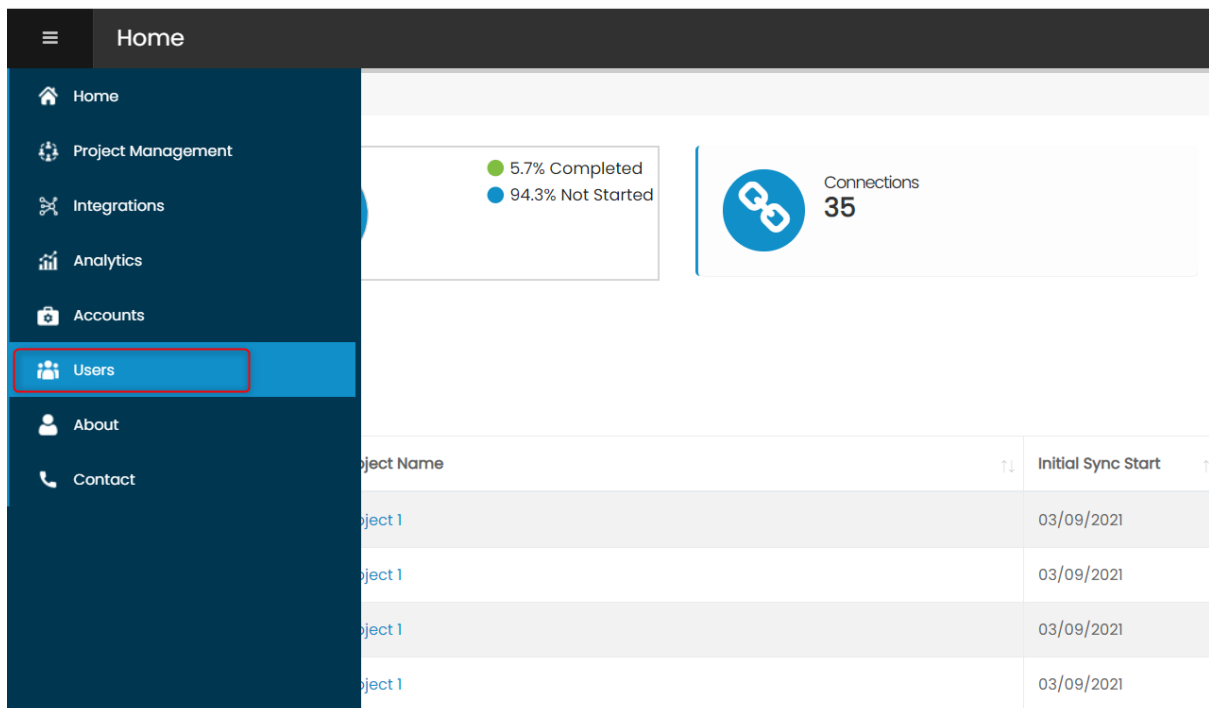
Sign In

Contact your company Administrator if you need access

**Step 3:** Only Super Admin and Account Admin who has the access to the application can edit Accounts. Enter your super admin or account admin credentials and click on next.



**Step 4:** Navigates to the homepage. Select "Users" from the left navigation menu.



**Step 5:** Navigates to the User page. Click on edit button of the user you want to edit.

The screenshot shows the 'Users' management interface. At the top right, there is a 'Create New' button. Below it, a search bar and a 'Show 10 entries' dropdown are visible. The main content is a table with the following data:

Name	Role	User Email	Status	
anthony sa	User	anthony.sa@star-knowledge.org	Active	Edit   Delete
syed.shadab@star-knowledge.org	Owner	syed.shadab@star-knowledge.org	Active	Edit   Delete

At the bottom of the table, it says 'Showing 1 to 2 of 2 entries'. There are 'Previous', '1', and 'Next' navigation buttons. The 'Edit' button for the second user is highlighted with a red box.

**Step 6:** Update the fields and click on save.

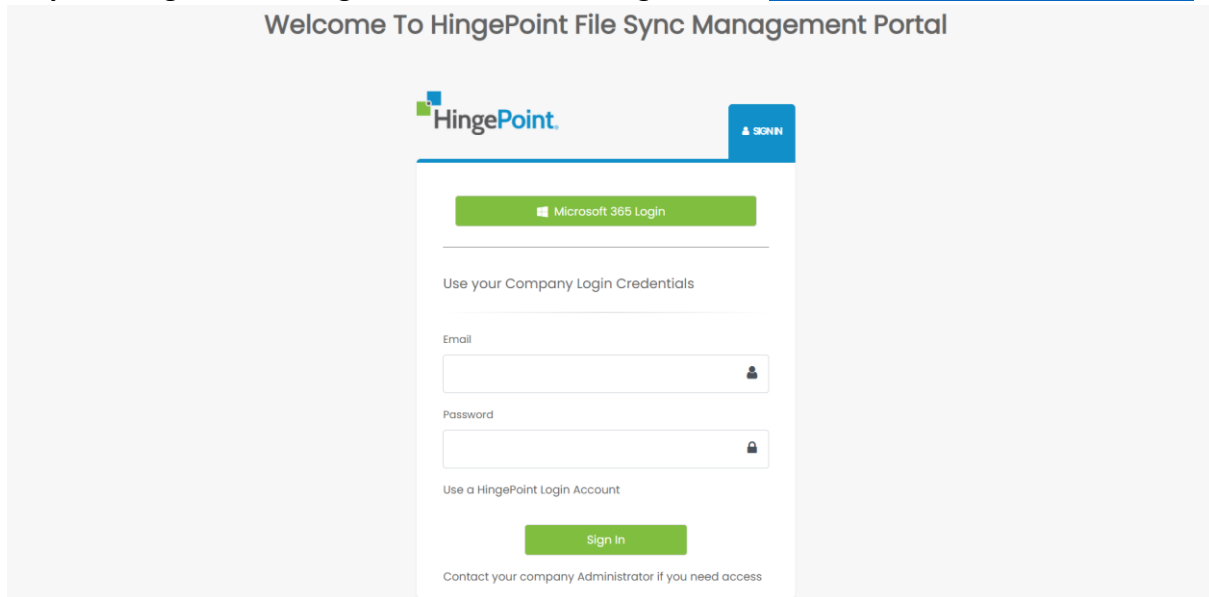
The screenshot shows the 'Edit User' form. The fields are as follows:

- First Name: syed
- Last Name: shadab
- User Email: syed.shadab@star-knowledge.org
- Role: Owner
- Status: Active

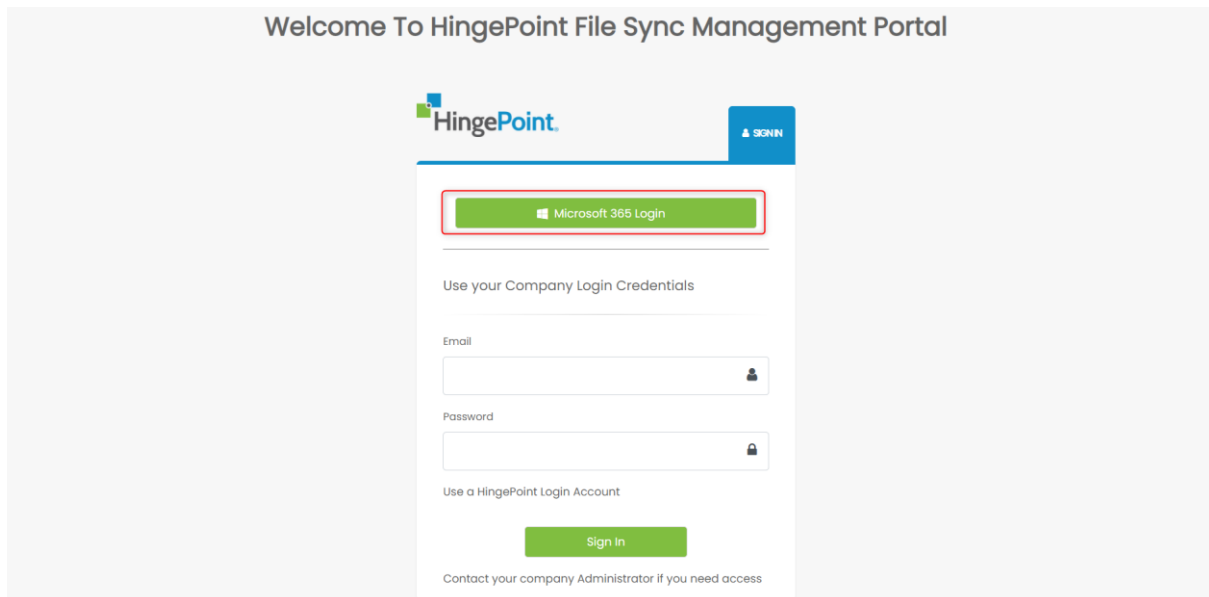
At the bottom right, there are 'Back' and 'Save' buttons. The 'Save' button is highlighted with a red box.

### 4.3 View a User:

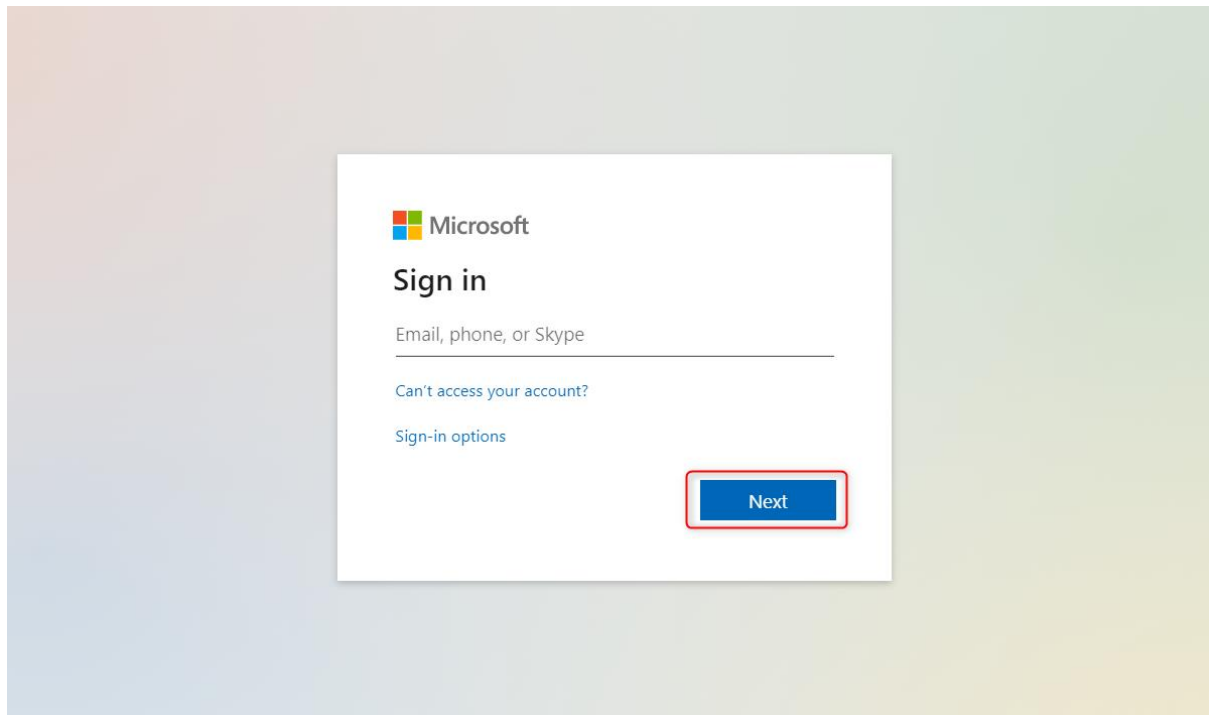
**Step 1:** Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



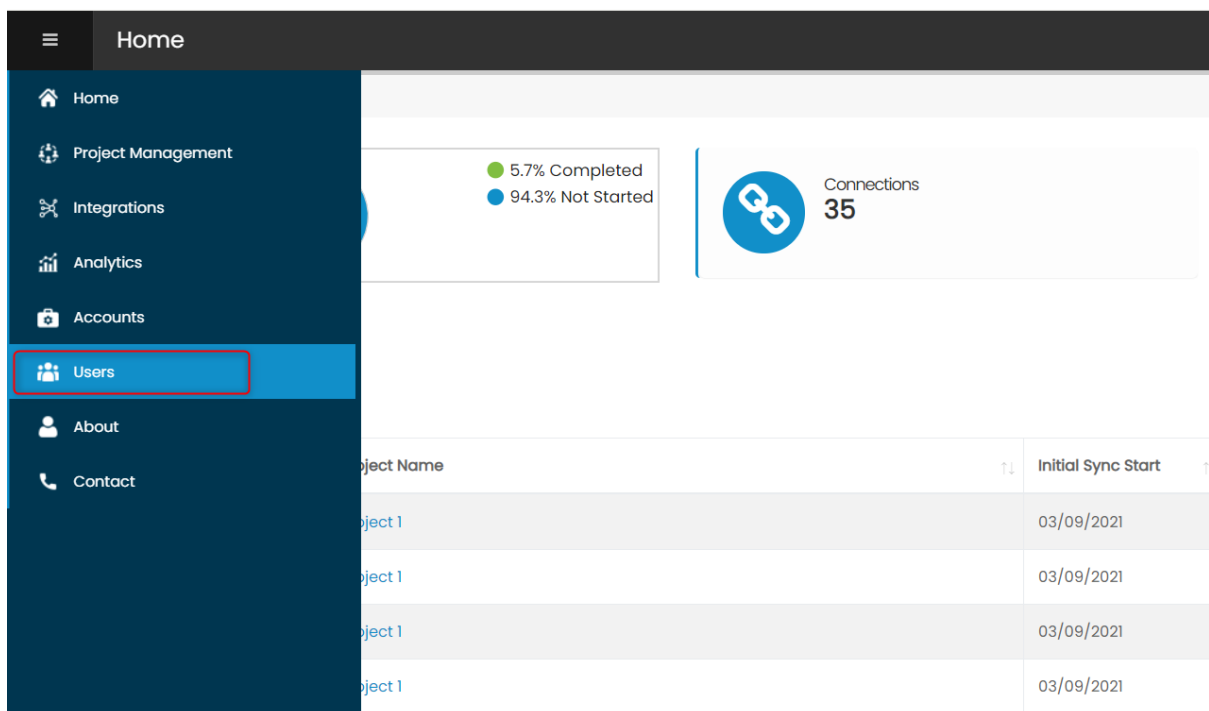
**Step 2:** Click on Use Microsoft button to login with your Microsoft account.



**Step 3:** Only Super Admin and Account Admin who has the access to the application can view Users. Enter your super admin or account admin credentials and click on next.



**Step 4:** Navigates to the Home Page. Select "Users" from the left navigation menu.



**Step 5:** Navigates to the User page. Click on name of the user you want to view.

Users

Show 10 entries

Search

Name	Role	User Email	Status
anthony sa	User	anthony.sa@star-knowledge.org	Active
syed shadab	Owner	syed.shadab@star-knowledge.org	Active

Showing 1 to 2 of 2 entries

Previous 1 Next

**Step 6:** The user is displayed.

View User

Name: syed shadab

Account Name: Oks Test

User Email: syed.shadab@star-knowledge.org

Role: Owner

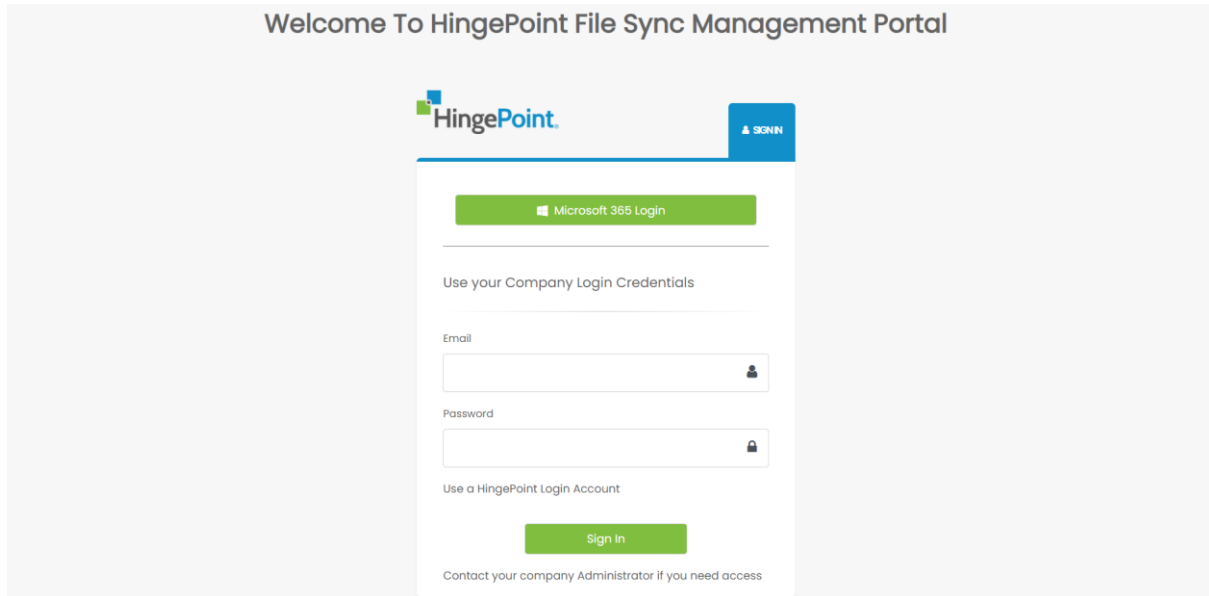
Status: Active

Back Delete Edit

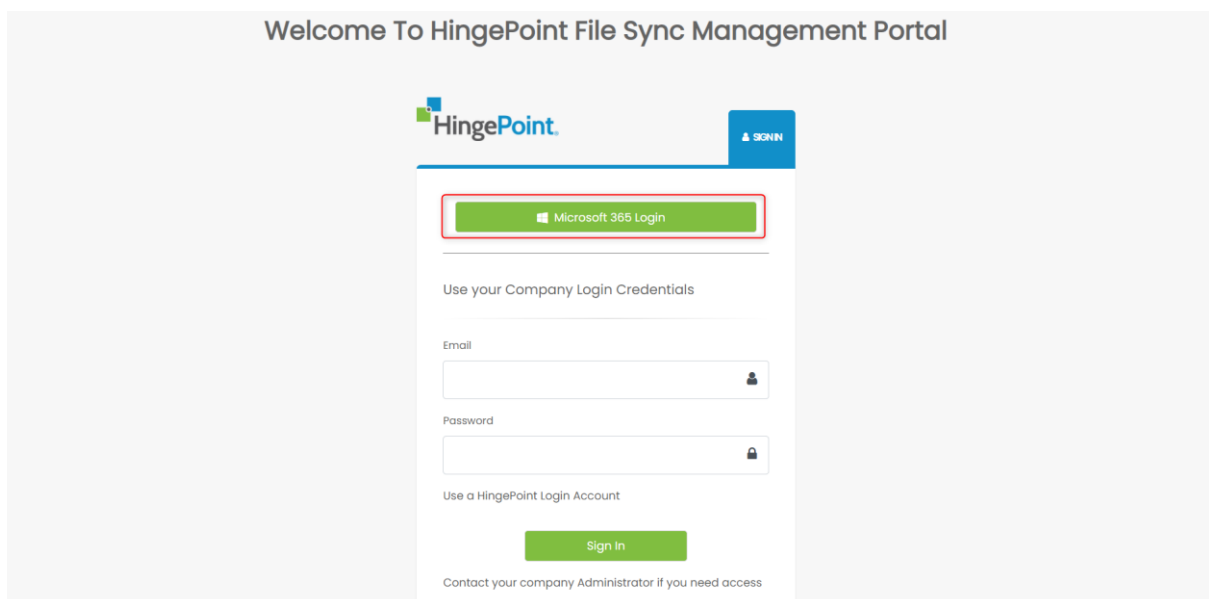


## 4.4 Delete a User:

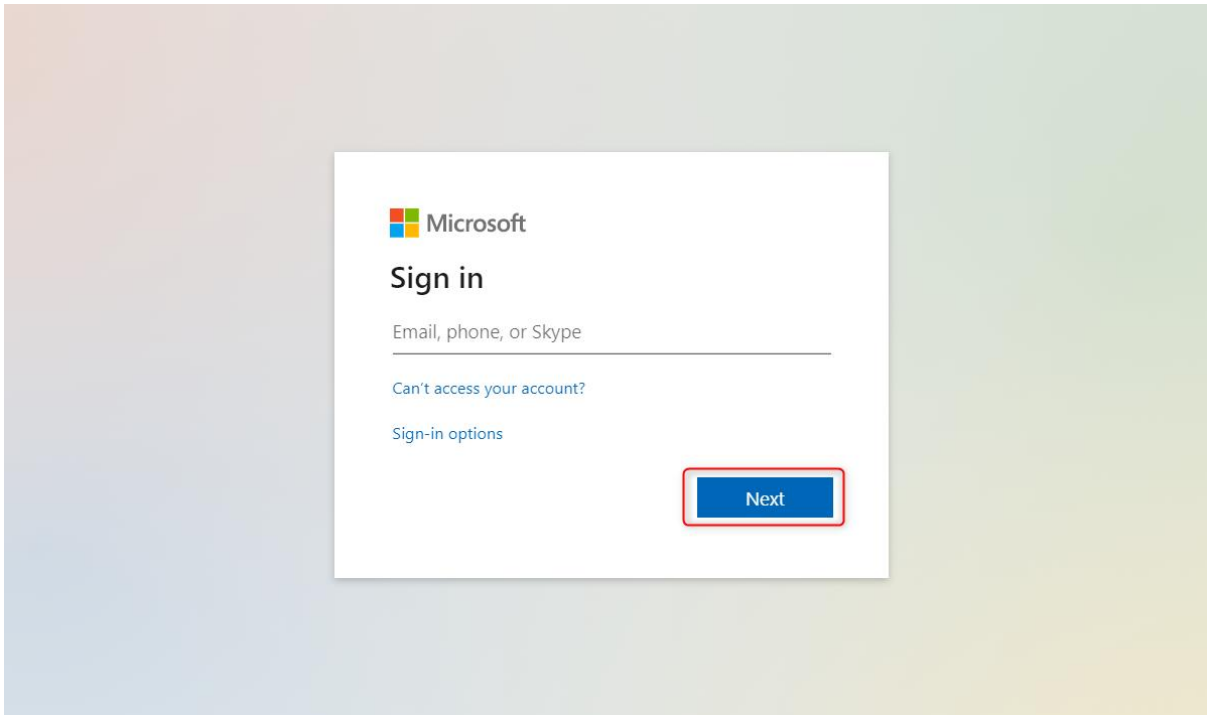
**Step 1:** Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



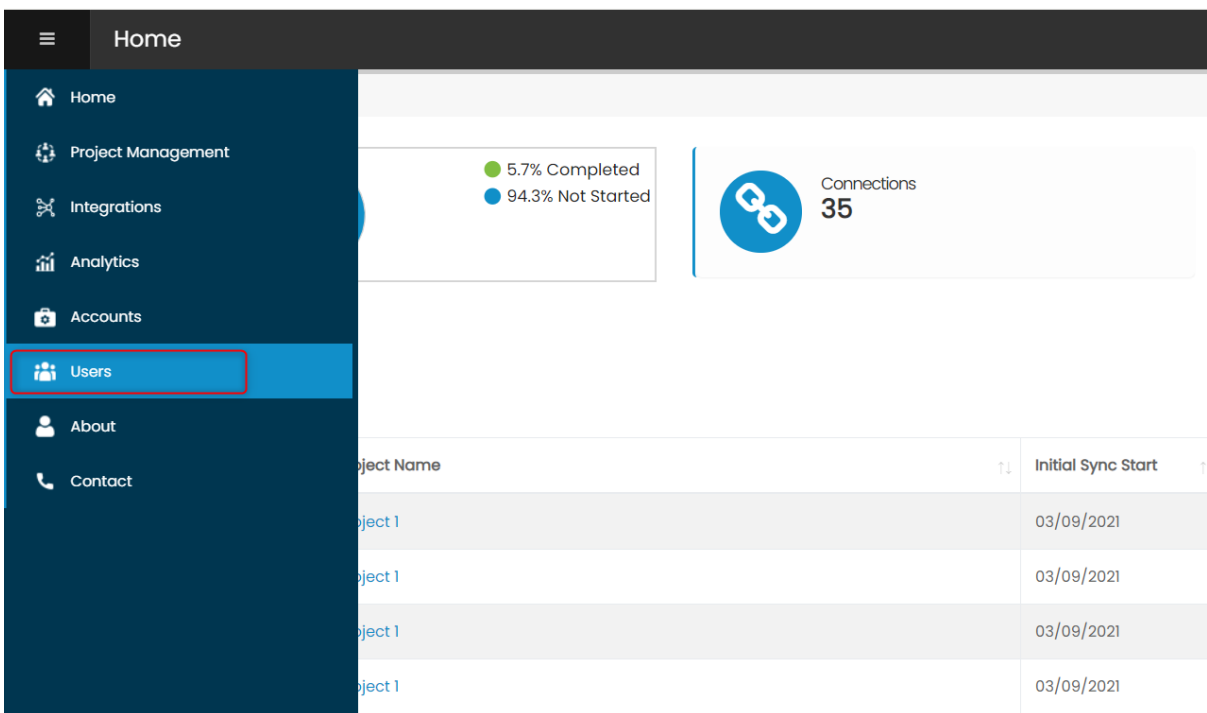
**Step 2:** Click on Use Microsoft button to login with your Microsoft account.



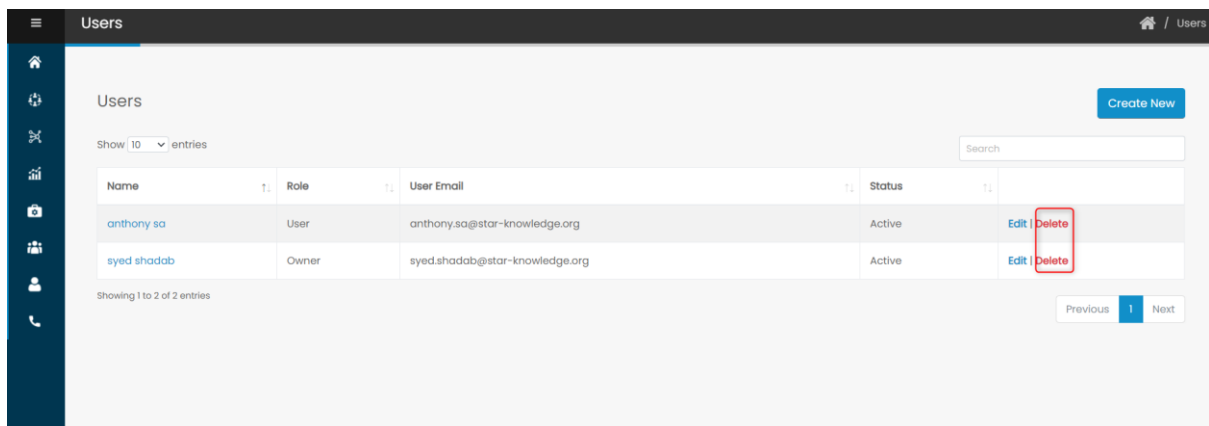
**Step 3:** Only Super Admin and Account Admin who has the access to the application can delete users. Enter your super admin or account admin credentials and click on next.



**Step 4:** Navigates to the home page. Select "User" from the left navigation menu.



**Step 5:** Navigates to the User page. Click on delete button of the account you want to delete.



**Step 6:** Click yes to delete the user.

