Finmon Asset Portal

The SIM Management Portal allows users to manage SIM card inventory, monitor data usage, assign SIMs to accounts or devices, and control network data usage — all from a single web-based interface.

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Introduction

Introduction

Sim Portal User Guide

This guide provides step-by-step instructions for using the Finmon Asset Management Portal. It is intended for existing and new Finmon clients.

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SIM Management Portal – User Guide

1. Introduction

1.1 Purpose of This Guide

This guide provides step-by-step instructions for using the **Finmon Asset Management Portal**. It is intended for existing and new Finmon clients.

1.2 System Overview

The SIM Management Portal allows users to manage SIM card inventory, monitor data usage, assign SIMs to accounts or devices, and control network data usage — all from a single web-based interface.

1.3 Key Features

- SIM inventory management and bulk provisioning
- Real-time usage monitoring and reporting
- Network data plan assignment
- Usage and threshold visibility
- Audit log and activity history

1.4 Intended Audience

This guide is intended to assist administrators and users to manage their business SIM estate in an easy-to-use web application.

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2. Getting Started

2.1 System Requirements

Before accessing the portal, ensure you have a Finmon portal profile (the same profile used at https://portal.finmon.co.za/).

2.2 Accessing the Portal

To access the SIM Management Portal:

- Open a supported web browser.
- Navigate to: https://iot.finmon.co.za
- The login page will be displayed.

Login page screenshot *Login screen*

2.3 Logging In

- Enter your **Username** in the Username field.
- Enter your **Password** in the Password field.
- Click the **CONTINUE** button.

2.4 Resetting Your Password

If you are having trouble logging in to the portal, please contact Finmon at support@finmon.co.za.

2.5 Dashboard Overview

After logging in, you will land on the Dashboard. The main areas of the interface are shown below:

Dashboard overview *Main dashboard*

3. SIM Inventory Management

3.1 Viewing the SIM Inventory

The SIM Inventory displays all SIM cards associated with your account. To access it:

- Click **SIMs** in the navigation menu.
- The SIM inventory list will be displayed.

SIM inventory list *SIM inventory navigation*

SIM inventory table columns *Inventory table columns*

3.2 Searching and Filtering SIMs

Use the search bar and filter options to find specific SIMs:

- Type a SIM/ICCID in the **Search** field.

Search and filter *Search and filter bar*

3.3 Adding a Single SIM

- Click the **Add SIM** button.
- Complete the required fields in the form.
- Click **OK** to confirm.
- The new SIM will appear in the inventory list.

Add SIM button *Add SIM button*

Add SIM form *Add SIM form fields*

3.4 Bulk Importing SIMs

To add multiple SIMs at once using a CSV file:

- Click **Actions > Import SIMs CSV**.
- Drag & Drop your CSV file, or Browse to upload it in the Bulk Import wizard.
- The file must include the correct headers for import.
- Click **Next**.

- Review for errors — you can download invalid rows to a new CSV and edit accordingly. Then click **Finish**.
- You can exit the bulk import wizard at any time by clicking outside the import window.

Actions menu *Actions dropdown*

Bulk import wizard *Bulk import wizard*

3.5 Editing SIM Details

- Locate the SIM in the inventory list.
- Click the **tickbox** to select the SIM.
- Click **Actions** to see the available update options (update status or device type, etc.).
- Click **CONFIRM** to save changes.

Edit SIM *Selecting a SIM and using Actions*

3.6 Changing SIM Status

You can activate, deactivate, suspend, or terminate individual SIMs:

- Select the SIM(s) using the checkbox in the inventory list.
- Click the **Actions** dropdown.
- Select the desired action (e.g. Activate, Suspend, Cancel).
- Confirm the action in the confirmation dialog.

Change SIM status *SIM status actions*

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4. Data Plan Management

4.1 Viewing Available Plans

To view the current available data packages, click the **Packages** menu.

Packages menu *Packages menu*

Available plans *Available data plans list*

4.2 Assigning a Plan to a SIM

- Open the main SIM window.
- Select a SIM and click **Actions > Change Status**, then select the desired plan from the dropdown.
- Click **CONFIRM**.

Assigning a plan *Assigning a data plan to a SIM*

4.3 Bulk Changes (Package or Device Type)

Open the main SIM window and use the checkbox next to the SIMs required to multi-select. You can then use the **Actions** button to change values for all selected SIMs.

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5. Usage Monitoring & Reporting

5.1 Viewing Usage for a SIM

To view data usage for an individual SIM, locate the SIM in the SIMs view and view the **Data Usage (Mb)** column or **Data Usage (%)** column. This is the current month's data usage value (48 hrs in arrears).

Usage columns *Data usage columns*

Usage detail *Usage detail view*

5.2 Usage Reports `Coming Soon`

The reporting module lets you generate usage summaries across accounts, groups, or the full SIM estate:

- Click the **Reports** menu item in the navigation.
- Currently the **Analytics Overview** is available — a dashboard of usage.
- Select the report type (e.g. Monthly Usage Summary, Top Consumers).
- Review the report as needed.
- Download the report as CSV using the **Export** button.

Usage reports *Analytics overview*

Usage analytics *Full analytics dashboard*

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6. Location Management

6.1 Viewing and Adding Locations

- Open the **Locations** page from the main window — this displays any current Locations in the system.
- To add a new Location, click the **Add Location** button.
- Enter the required details and click **OK**.

Locations page *Locations management page*

Add location *Add location form*

7. Device Type Management

Device Type Management

- Open the **Device Types** page from the main window.
- To add a new device type, click **Add Device Type**.
- Enter the Name details and select the system device type from the list. Select the billing package that will link to this device type.

> **Important note:** Some system device types are set to specific billing packages at a system level and cannot be updated.

Device types page *Device types list*

Add device type *Add device type form*

8. User & Role Management

8.1 User Roles Overview

The portal uses role-based access control (RBAC). Currently, user profiles are managed in the Finmon portal. The default roles are:

Role	Access Level
Administrator	Full access to all portal features including user management and billing.
User	Standard access to view and manage SIMs assigned to their account.

> User profiles are managed via the **Finmon Portal** at portal.finmon.co.za.

9. Support & Contact Information

Support & Contact Information

If you require assistance beyond what is covered in this guide, please contact us:

Channel	Details
Email Support	support@finmon.co.za
Finmon Portal	https://portal.finmon.co.za/
SIM Management Portal	https://iot.finmon.co.za
