



BOOKS

# Profile & Security

Profile in Core, password changes, multi-factor authentication, active sessions, Books-specific preferences.

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Your profile and security settings live partly in Books and partly in UrTravelPro Core (the shared identity layer). This guide covers what's where and how to keep your account secure.

## Profile (in Core)

Because Books uses Single Sign-On through Core, your name, email, and password are managed at the Core level. Changing them once updates every UrTravelPro app you use.

- Click your avatar in the top right → **Account Settings**
- You'll be redirected to `core.urtravelpro.com` to update your profile
- Changes propagate to Books (and Marketing, Compass, etc.) within seconds

## Password Changes

Change your password from Core. Use a strong unique password — Books has access to your financial records, and a compromised password could be devastating.

### ADVISOR TIP

Use a password manager. Long random passwords generated by 1Password, Bitwarden, or Apple Keychain are dramatically more secure than anything you'll memorize.

## Multi-Factor Authentication (MFA)

We strongly recommend enabling MFA on your Core account. Once enabled, signing in requires both your password and a one-time code from an authenticator app (Google Authenticator, Authy, 1Password, etc.).

1. Go to Core → **Security** → **Multi-Factor Authentication**
2. Click **Enable MFA**
3. Scan the QR code with your authenticator app
4. Enter the 6-digit code to confirm

5. Save your recovery codes somewhere safe — they're your backup if you lose your authenticator

## Active Sessions

View and revoke active sessions from Core → **Security** → **Active Sessions**. Each session shows the device, IP address, last activity, and approximate location. If you see a session you don't recognize, revoke it immediately and change your password.

## Books-Specific Settings

Settings that ARE specific to Books (not Core):

- **Default company** — which company opens when you sign in (Settings → Preferences)
- **Notification preferences** — which Books events trigger email alerts (Settings → Notifications)
- **Date format** — MM/DD/YYYY vs. DD/MM/YYYY vs. YYYY-MM-DD (Settings → Preferences)
- **Number format** — thousand separators, decimal style (Settings → Preferences)
- **Default chart of accounts** — for new companies (Settings → Defaults)

## Closing Your Account

To permanently close your Books account, [submit a ticket](#). We'll:

- Export all your company data (transactions, reports, attachments) as a final archive
- Cancel your subscription and stop billing
- Delete all data after a 90-day grace period (in case you change your mind)

Note: closing Books does NOT close your Core account. Your Core identity remains active for the other UrTravelPro apps you use. To close Core entirely, follow the account-deletion flow at Core → Account → Delete.