Quick Start Guide

STEP 1 Access your portal. • Go to: https://www.vfd-pro.com/user, • Enter your email address and click E-mail	/password ail new password
STEP 2 Add clients. User Portal User Portal Welcome Demonstration Company Demonstration below to manage communes User Select organization below to manage communes Demonstration Company Demonstration Company Demonstration Company Owner: Demonstration Company Demonstration Company	User Portal » Demonstration Company Client List Demonstration Company Search: Type: All v Search Add Client Go to Dashboard
STEP 3 Connect to Account	ts Package.

- 1. Company Name
- 2. Company Number (Optional, enter '-' if you don't know)
- 3. Reporting Date (when all transactions have been reconciled and can be reported on)
- 4. Financial Year End
- 5. Connection Type (Trial / Free / Paid)

Click Save.

Client Details		Accounting Software		
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Note: Whilst reports are being generated the Reporting Date will be marked 'Pending'. Reports are normally available to view in 15 to 20 minutes but during periods of peak demand it could take 3 times longer. You don't have to wait before connecting a 2nd, 3rd... client.

STEP 4

Review Reports

It will take anything from a few seconds to 45 minutes to synchronise depending on the size if the file. The report icon will appear grey until the reports are being generated.

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Note: It can take anything from few seconds to 45 minutes to synchronise depending on the number of transactions to process. The report icon will appear grey until the reports are generated