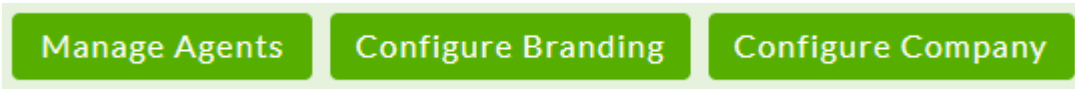


Updating My Disclaimer Instructions

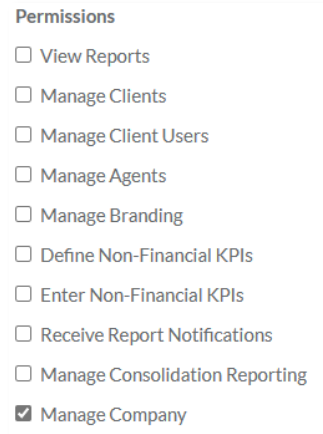
The information below describes how you can align your VFD Pro reports and models to the rest of your client communications by amending the disclaimers displayed. The following instructions detail the process you will need to go through to amend the standard disclaimers.

Configure Company

The functionality to amend the disclaimers is behind the 'Configure Company' button which is accessible via your VFD Portal home screen.

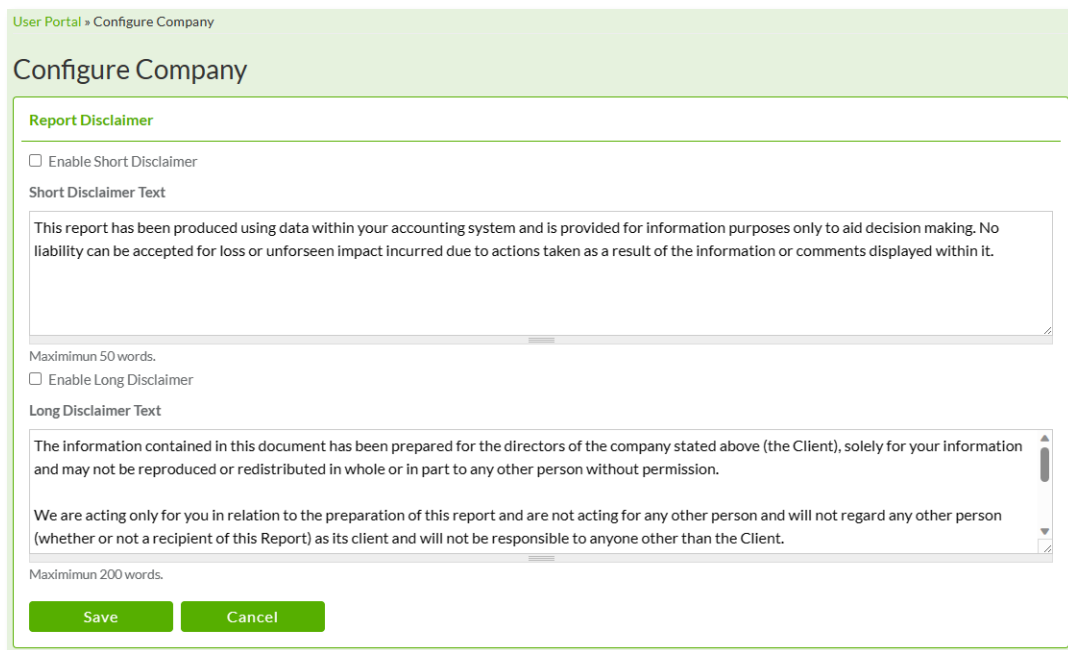


The functionality to configure the disclaimer is automatically assigned to the Primary account holder only, if you wish to assign this functionality to another member of your team, this can be actioned via the 'Manage Agents' button. You will need to ensure the 'Manage Company' box is ticked.



Report Disclaimer

Once you click the 'Configure Company' button you will be taken to the below screen.



User Portal » Configure Company

Configure Company

Report Disclaimer

Enable Short Disclaimer

Short Disclaimer Text

This report has been produced using data within your accounting system and is provided for information purposes only to aid decision making. No liability can be accepted for loss or unforeseen impact incurred due to actions taken as a result of the information or comments displayed within it.

Maximum 50 words.

Enable Long Disclaimer

Long Disclaimer Text

The information contained in this document has been prepared for the directors of the company stated above (the Client), solely for your information and may not be reproduced or redistributed in whole or in part to any other person without permission.

We are acting only for you in relation to the preparation of this report and are not acting for any other person and will not regard any other person (whether or not a recipient of this Report) as its client and will not be responsible to anyone other than the Client.

Maximum 200 words.

Updating My Disclaimer Instructions

Last updated: 3rd July 2023

You have the capability to enable/disable a disclaimer as well as the ability to define exactly what you wish to display.

Short Disclaimer

This disclaimer is typically displayed at the bottom of your shorter reports (2-4 pages) and is a maximum of 50 words long. The default narrative is display in the 'Short Disclaimer Text' box and if the tick box is unticked, will be displayed as standard.

Enable Short Disclaimer

Short Disclaimer Text

This report has been produced using data within your accounting system and is provided for information purposes only to aid decision making. No liability can be accepted for loss or unforeseen impact incurred due to actions taken as a result of the information or comments displayed within it.

Maximimun 50 words.

If you wish to change the disclaimer text to something else, just tick the 'Enable Short Disclaimer' box and type your desired text into the box provided as per the example below.

Enable Short Disclaimer

Short Disclaimer Text

This is the short disclaimer text I would rather display.

Maximimun 50 words.

If you would prefer not to show a short disclaimer at all on your reports or models, simply tick the 'Enable Short Disclaimer' box and ensure the 'Short Disclaimer Text' box is left blank as per the example below.

Enable Short Disclaimer

Short Disclaimer Text

Maximimun 50 words.

Updating My Disclaimer Instructions

Last updated: 3rd July 2023

Long Disclaimer

This disclaimer is typically displayed as a separate page at the end of your longer reports and is a maximum of 200 words long. The default narrative is display in the 'Long Disclaimer Text' box and if the tick box is unticked, will be displayed as standard.

Enable Long Disclaimer

Long Disclaimer Text

The information contained in this document has been prepared for the directors of the company stated above (the Client), solely for your information and may not be reproduced or redistributed in whole or in part to any other person without permission.

We are acting only for you in relation to the preparation of this report and are not acting for any other person and will not regard any other person (whether or not a recipient of this Report) as its client and will not be responsible to anyone other than the Client.

Maximimun 200 words.

If you wish to change the disclaimer text to something else, just tick the 'Enable Long Disclaimer' box and type your desired text into the box provided as per the example below. You can expand the box to display all of the text if required by dragging the bottom right-hand corner of the 'Long Disclaimer Text' box.

Enable Long Disclaimer

Long Disclaimer Text

This is the long disclaimer text I would rather display.

Maximimun 200 words.

If you would prefer not to show a long disclaimer at all on your reports or models, simply tick the 'Enable Long Disclaimer' box and ensure the 'Long Disclaimer Text' box is left blank as per the example below.

Enable Long Disclaimer

Long Disclaimer Text

Maximimun 200 words.