


You may need a prospective client to connect to Xero/QBO themselves or find you would like your client to receive a notification when new reports are ready to view and/or allow them to view reports without having to ask you to provide them. To enable this, you can set the client up as a 'Client User'. You can also specify which reports they will have access to.

Note: A guide for the client users is available and can be edited with your branding. Contact [support@vfd-pro.com](mailto:support@vfd-pro.com) to request a copy.

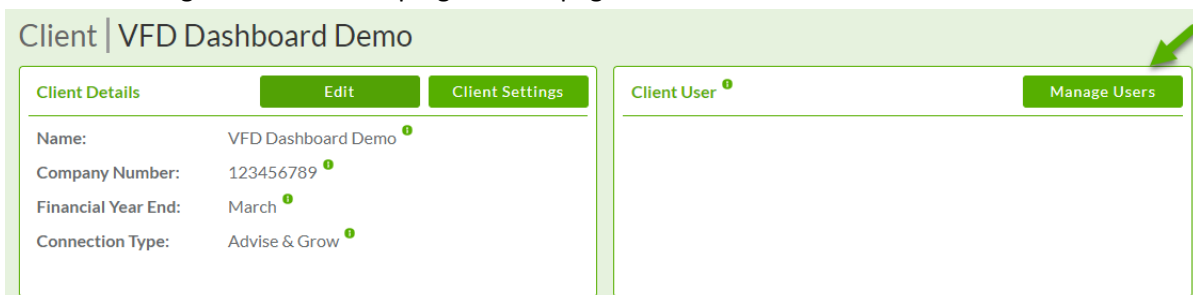
## CREATING A CLIENT USER

- 1) Login to [VFD-Pro.com](https://vfd-pro.com) and click to enter the relevant division, typically that in which your clients are listed.
- 2) Click on 'View' to the right of the relevant company name



VFD Dashboard Demo - Covid	Advise & Grow	14/05/2021	Jan-2021	[REDACTED]	AWS Data Synced	view	[icon]	[icon]
VFD Dashboard Demo	Advise & Grow	14/05/2021	Jan-2020	[REDACTED]	AWS Data Synced	view	edit	[icon]
A Bounded Client Demo	Advise & Grow	07/04/2021	Mar-2020	[REDACTED]	AWS Data Synced	view	edit	[icon]

- 3) Click on 'Manage Users' at the top right of the page



Client | VFD Dashboard Demo

Client Details

Edit

Client Settings

Name:

VFD Dashboard Demo

Company Number:

123456789

Financial Year End:

March

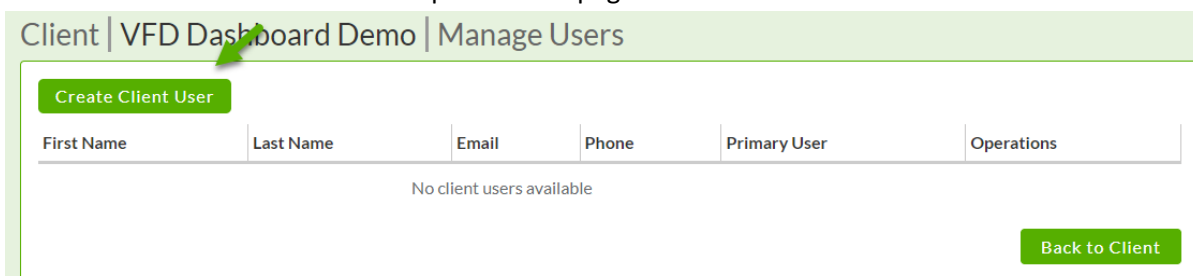
Connection Type:

Advise & Grow

Client User

Manage Users

- 4) Click on Create Client User to the top left of the page



Client | VFD Dashboard Demo | Manage Users

Create Client User

First Name	Last Name	Email	Phone	Primary User	Operations
No client users available					

Back to Client

- 5) Enter the client's details and select permissions. The access these permissions will grant is detailed on the right of the screen as shown:

**Permission Details**

**View Reports:** Tick this option if the user is able to view reports when they logon.

**Manage Users:** Tick this option if the user is able to add, edit or delete other users.

**Receive Report Notifications:** Tick this option if the user is to receive automatic notification when new reports are ready for viewing.

**Define Non-Financial KPI's:** Tick this option if the user is able to define Non-Financial KPI's

**Enter Non-Financial KPI's:** Tick this option if the user is able to enter data to existing Non-Financial KPI's

**Primary User:** Tick this option if the user is the primary user for this business.

- 6) Click 'Save' at the bottom of the screen. This will trigger an email to the new user with a link for a one-time login allowing them to set their password for future logins.

Note: On clicking the link some users receive an error stating 'This page isn't working. Try clearing your cookies'. If this occurs, please advise them to click on the link 'try clearing your cookies' and follow the instructions provided.

## SPECIFYING WHICH REPORTS CLIENT USERS CAN ACCESS

1) Follow steps 1) and 2) from [Creating a Client User](#)

2) Click on 'Client Settings' at the top of the page

Client | VFD Dashboard Demo

**Client Details** **Edit** **Client Settings** **Client User** **Manage Users**

Name: VFD Dashboard Demo  
Company Number: 123456789  
Financial Year End: March  
Connection Type: Advise & Grow

3) Here you will be able to see all the reports that are available on your account. You can then use the dropdowns to enable or disable each report for the Client Users from this company.

Client | VFD Dashboard Demo | Client Settings

**Report Permissions**

**Enhanced Performance Reports**

Business Overview	Enabled
Performance Analysis	Enabled
Management Report	Enabled
Board Summary	Enabled
Board Report	Enabled
Performance Trend	Enabled
Customer Analysis	Enabled
Marketing ROI	Enabled
Supplier Analysis	Enabled

**Opportunity Exception Reports**

Telecoms Exception Report	Enabled
Utilities Exception Report	Enabled
Customer Exception Report	Enabled

**Business Growth Advisory**

Business Growth Model	Enabled
Client Segmentation Model	
Customer Targeting Model	Enabled
Forecast and Funding Proposal (Customer) Model	Enabled
Forecast and Funding Proposal (Nominal) Model	Enabled
Universal Funding Proposal Model	Enabled
Business Data Model	Enabled

**Save** **Cancel**

For example: if you would only like them to be able to view the Business Overview report, you would simply select 'Disabled' in the drop downs for all the other reports.

4) Click 'Save' at the bottom of the screen to save your changes.

If we can be of any help, please email [support@vfd-pro.com](mailto:support@vfd-pro.com)