

Quick Start Guide

STEP 1

Access your portal.

- Go to: <https://www.vfd-pro.com/user/password>
- Enter your email address and click **E-mail new password**

Username or e-mail address *

E-mail new password

STEP 2

Add clients.

User Portal

Welcome Demonstration Company
Please select organization below to manage companies

Demonstration Company

Owner: Demonstration Company

User Portal » Demonstration Company

Client List | Demonstration Company

Search:

Type: All

Search

Add Client

Go to Dashboard

STEP 3

Connect to Accounts Package.

Enter the required information and select the accounting software to use.

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 | Create

Client Details

Division: Demonstration Company

Name: *

Company Number: *

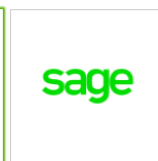
Reporting Date: * Nov 2020

Financial Year End: * Jan

Connection Type: * Trial

Accounting Software

Please select the accounting software that this client uses:



Save

Cancel

STEP 3.1

Accounting system Connection Xero & QBO (or File Upload – see below)

STEP 3.2

File Upload for Sage

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 of the file. The report icon will appear grey until the reports are being generated.

Name	Last Updated	Reporting Date	Progress	Report Status
Co Name	09/01/2020 10:27	Oct-2019	100.0%	Data Synced
Test Company 999	28/01/2020 11:41	Dec-2019	100.0%	Data Synced
Test 123				

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