Client User Management Guide

Last updated: 5th October 2021

virtual finance director

You may 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.
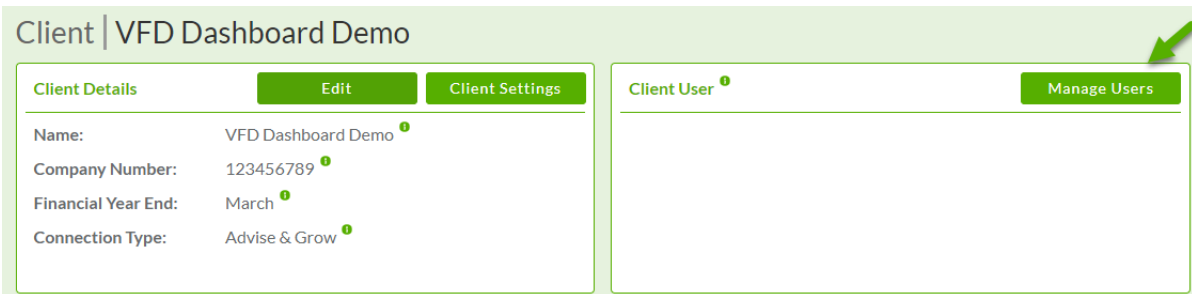
Note: *A guide for the client users is available and can be edited with your branding. Contact* support@vfd-pro.com *to request a copy.*
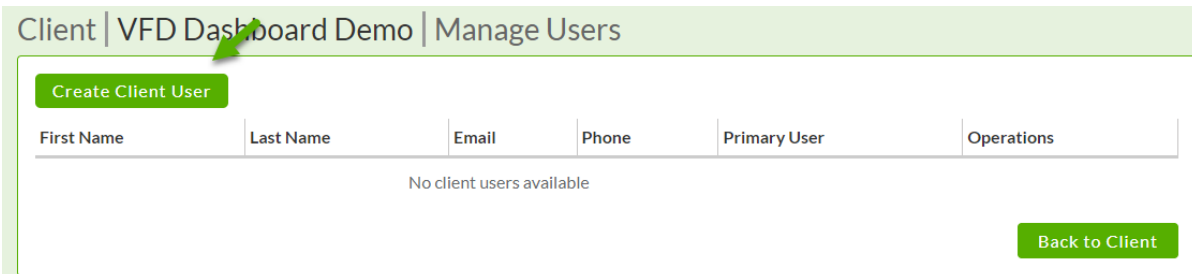
CREATING A CLIENT USER

1) Login to 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	Mar-2021	100.0 %	AWS Data Synced	view edit
VFD Dashboard Demo	Advise & Grow	14/05/2021	Jan-2020	100.0 %	AWS Data Synced	view edit
A Branded Client Logo	Advise & Grow	27/04/2021	Mar-2020	100.0%	AWS Data Synced	view edit

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 below:

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.

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.*
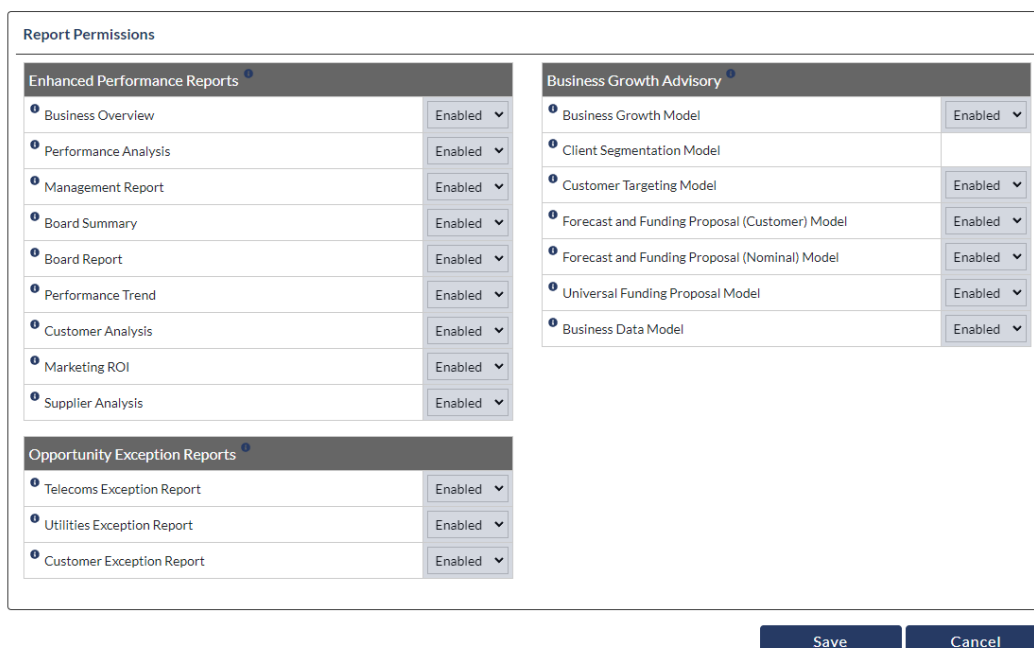
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SPECIFYING WHICH REPORTS CLIENT USERS CAN ACCESS

1) Follow steps 1) and 2) from Creating a Client User

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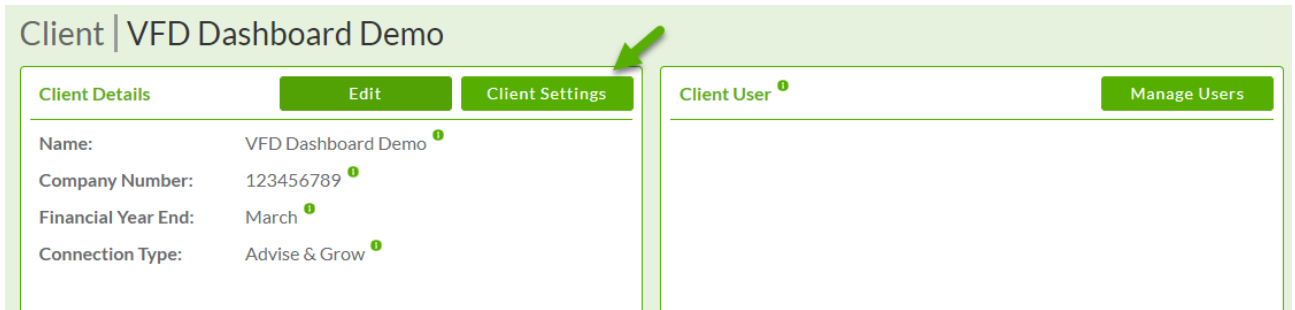
3) Here you will be able to see all the reports that are available on your account. You can then use the dropdowns to enable or disable each report for the Client Users from this company.

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.

To have your company branding added to your portal, or if we can be of any help, please email support@vfd-pro.com