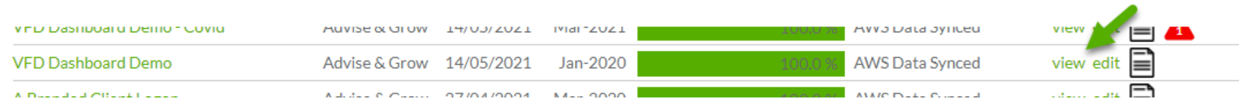
You may need a prospective client to connect to Xero/QBO themselves or find you would like your client to receive a notification when new reports are ready to view and/or allow them to view reports without having to ask you to provide them. To enable this, you can set the client up as a 'Client User'.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

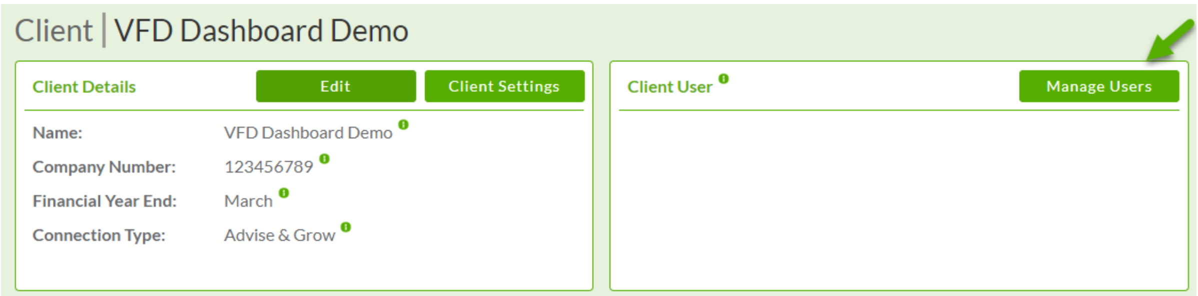
CREATING A CLIENT USER

1) Login to VFD-Pro.com and click to enter the relevant division, typically that in which your clients are listed.

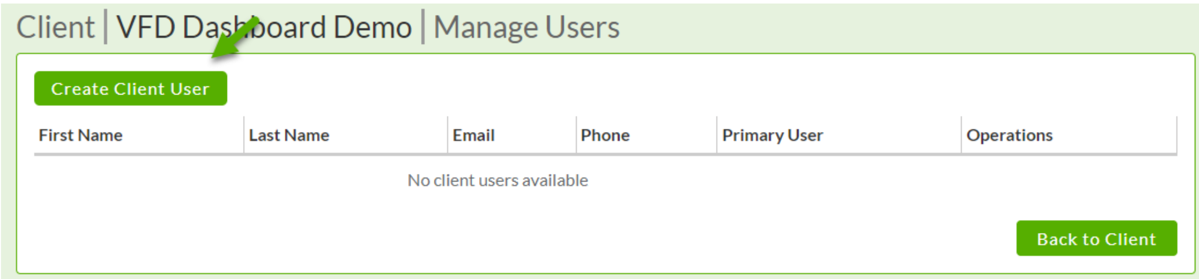
2) Click on 'View' to the right of the relevant company name



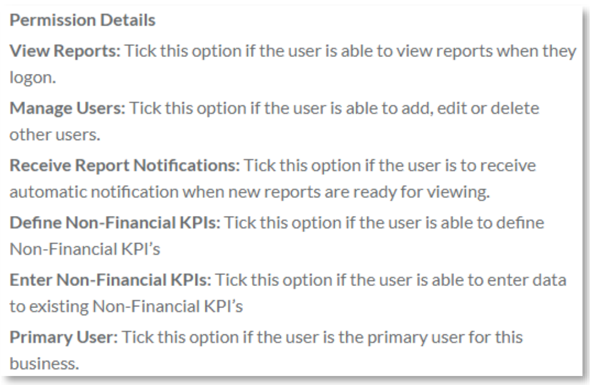
3) Click on 'Manage Users' at the top right of the page



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



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:

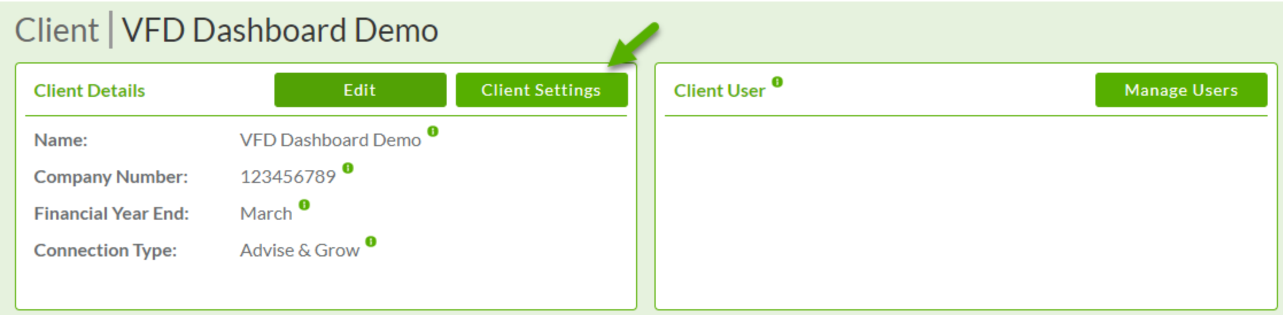


6) Click 'Save' at the bottom of the screen. This will trigger an email to the new user with a link for a one-time login allowing them to set their password for future logins.
   Note: *On clicking the link some users receive an error stating 'This page isn't working. Try clearing your cookies'. If this occurs, please advise them to click on the link 'try clearing your cookies' and follow the instructions provided.*

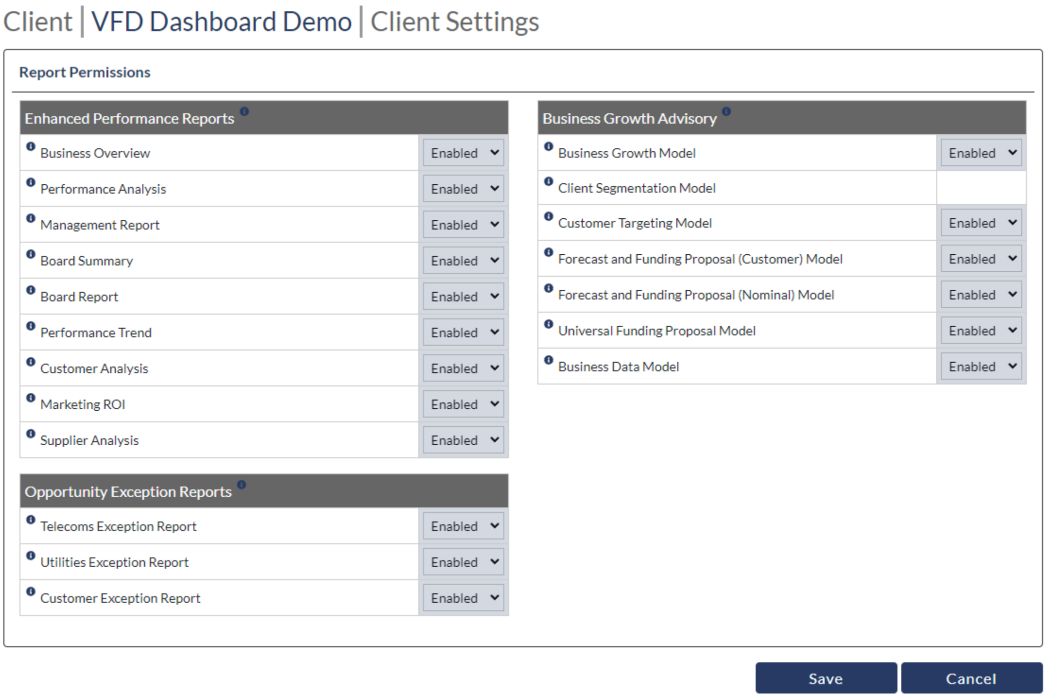
SPECIFYING WHICH REPORTS CLIENT USERS CAN ACCESS

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

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



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.

If we can be of any help, please email support@vfd-pro.com