

# 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 2

### 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: \*

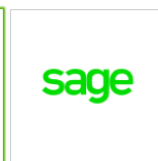
Reporting Date: \* Nov 2020

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 2<sup>nd</sup>, 3<sup>rd</sup>... clients.*

**STEP 3.1**

**Review Reports**

It will take anything from few seconds to 45 minutes to synchronise depending on the size if the file. The report icon will appear grey until the reports are being generated.

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

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