



Dashboard Overview



## Log in

From your browser, navigate to the following [webpage](#):

“[https://bluesky.valucompass.com/logins/sign\\_in](https://bluesky.valucompass.com/logins/sign_in)”

Enter the email address that is associated with your account.

Then put in your password - if it is not auto-generated and saved by your browser.

Click “Sign In”

 **ValuCompass**  
Demo

---

Building Valuable Businesses

Sign In

Email

Password

[Sign in](#)

[New Account Setup](#)

[Forgot your password?](#)

ValuCompass © 2022 V1.11 Demo Privacy Support Contact: 231-239-0532



## Roles

Within the ValuCompass software, there are essentially three different roles we assign users - this does not include clients or prospects which fall into a separate category that we will discuss later.

As a ValuCompass user, you will be assigned one, two, or all three of these roles - depending on your need and position.

1. Firm Owner
2. Advisor
3. Firm Business Owner

### Role Enables

- Firm Owner**  
*For account setup, check this option for multi-advisor firms.*
- Advisor**  
*For account setup, check this option for advisors not affiliated with a firm.*
- Business Owner**  
*For account setup, check this option for businesses not affiliated with an advisor.*

# ValuCompass - The Dashboard



## Advisor View

This is the **standard** view for the financial advisor.

Notice that for each client, the advisor can quickly see all the important information as well as when it was last updated.

This view also includes the totals for all clients of the advisor for each of the following categories.

- Revenue
- Current Enterprise Value
- Fees associated with Engagement
- Insurance Premiums
- AUM's
- 401K's

The dashboard displays the following data:

Advisor Profile		Revenue	Value	Fees	Insurance	AUM	401K	Team
Tom White	4/0	\$12.5M	\$7.06M	\$30K	\$10.5M	\$5.01M		

  

Clients (4)		Revenue	Value	Fees	Insurance	AUM	401K	Team	Updated
<a href="#">Johnny Ace</a>	Ace Hardware	\$4M	\$3.28M \$1.38M	\$17K \$32.8K	\$6.12M \$12.2M	\$500K			01-02-2023
<a href="#">Mary Main</a>	Main Street Merchandise	\$2M	\$1.01M \$412K	\$10.1K		\$2.16M			01-02-2023
<a href="#">Sally Speed</a>	Speedy Sports	\$1.5M	\$396K \$229K	\$13K \$3.96K	\$651K \$1.3M	\$750K			01-02-2023
<a href="#">Tom White</a>	Wealth Advisors Inc.	\$5M	\$2.37M \$1.3M	\$23.7K	\$3.68M \$7.36M	\$2.85M			01-02-2023

# ValuCompass - The Dashboard



## Advisor View

This is the **standard** view for the financial advisor.

Notice that for each client, the advisor can quickly see all the important information as well as when it was last updated.

This view also includes the totals for all clients of the advisor for each of the following categories.

- Revenue
- Current Enterprise Value
- Fees associated with Engagement
- Insurance Premiums
- AUM's
- 401K's

Advisor Profile									
Advisor	Cl/Pro	Revenue	Value	Fees	Insurance	AUM	401K	Team	
Tom White	4/0	\$12.5M	\$7.06M	\$30K	\$10.5M	\$5.01M			
Clients (4)									
		Revenue	Value	Fees	Insurance	AUM	401K	Team	Updated
Johnny Ace	Ace Hardware	\$4M	\$3.28M \$1.38M	\$17K \$32.8K	\$6.12M \$12.2M	\$500K			01-02-2023
Mary Main	Main Street Merchandise	\$2M	\$1.01M \$412K	\$10.1K		\$2.16M			01-02-2023
Sally Speed	Speedy Sports	\$1.5M	\$396K \$229K	\$13K \$3.96K	\$651K \$1.3M	\$750K			01-02-2023
Tom White	Wealth Advisors Inc.	\$5M	\$2.37M \$1.3M	\$23.7K \$7.36M	\$3.68M \$7.36M	\$2.85M			01-02-2023

# ValuCompass - The Dashboard



## Advisor Dashboard Details

From the Advisor view, you have the ability to click on each individual client or prospect - highlighted in blue. From here you can edit specific information about each business owner.

You also have the ability to add new clients, using the “Add Client” link in purple.

Under the business owner, you will see the name of the business. Under some of the columns you will find numbers in green.

- Value Gap opportunities
- Fee opportunities
- Insurance opportunities
- AUM opportunities

These opportunity numbers are outlined next and meant to motivate and encourage advisors.

Advisor Profile						
Tom White	Cli/Pro	Revenue	Value	Fees	Insurance	AUM
	4/0	\$12.5M	\$7.06M	\$30K	\$10.5M	\$5.01M
Clients (4)						
		Revenue	Value	Fees	Insurance	AUM
<a href="#">Johnny Ace</a>		\$4M	\$3.28M	\$17K	\$6.12M	
Ace Hardware			\$1.38M	\$32.8K	\$12.2M	\$500K
<a href="#">Mary Main</a>		\$2M	\$1.01M			\$2.16M
Main Street Merchandise			\$412K	\$10.1K		
<a href="#">Sally Speed</a>		\$1.5M	\$396K	\$13K	\$651K	
Speedy Sports			\$229K	\$3.96K	\$1.3M	\$750K
<a href="#">Tom White</a>		\$5M	\$2.37M		\$3.68M	\$2.85M
Wealth Advisors Inc.			\$1.3M	\$23.7K	\$7.36M	

# ValuCompass - The Dashboard



## Firm Owner View

In this standard view, you can see Tom White's Dashboard.

Tom White is the **firm owner** of the Advisor Wealth Inc. financial advisory firm.

Tom White is also the **only advisor** for this firm at this point.

### Firm Features

- Show Firm Client List  
*For Firm Owners Only: List firm clients and basic data on firm dashboard view.*
- Hide Firm View  
*For Firm Owners Only: For account setup, check this option if the firm owner has only one advisor and the advisor is the same person as the firm owner. Assumes no additional advisors are required.*
- Bypass Add Advisor Paywall  
*For Firm Owners Only: Allow firm owner to invite advisors without contacting support, (for testing and development only)*
- Firm Lead Generation Panel  
*Enables lead generation panel for this firm.*

Firm Features is for Internal Use Only

### Tom White Dashboard

#### Firm Profile

Advisor Wealth Inc.	Advisors: 1	CU/Pro: 4/0	Revenue: \$12.5M	Value: \$7.06M	Fees: \$30K	Insurance: \$10.5M	AUM: \$5.01M	401K: -	Team: 0	Employees: 87
---------------------	-------------	-------------	------------------	----------------	-------------	--------------------	--------------	---------	---------	---------------

#### Firm Advisors

	CU/Pro	Revenue	Value	Fees	Insurance	AUM	401K	Team	<a href="#">Add Advisor</a>
Tom White	4/0	\$12.5M	\$7.06M	\$30K	\$10.5M	\$5.01M	-	-	

#### Advisor Profile

Tom White	CU/Pro: 4/0	Revenue: \$12.5M	Value: \$7.06M	Fees: \$30K	Insurance: \$10.5M	AUM: \$5.01M	401K: -	Team: -
-----------	-------------	------------------	----------------	-------------	--------------------	--------------	---------	---------

#### Clients (4)

	Revenue	Value	Fees	Insurance	AUM	401K	Team	Updated	<a href="#">Add Client</a>
Johnny Ace Ace Hardware	\$4M	\$3.28M \$1.38M	\$17K \$32.8K	\$6.12M \$12.2M				12-20-2022	
Mary Main Main Street Merchandise	\$2M	\$1.01M \$412K	\$10.1K		\$2.16M			12-20-2022	
Sally Speed Speedy Sports	\$1.5M	\$396K \$229K	\$13K \$3.96K	\$651K	\$1.3M \$750K			12-20-2022	
Tom White Wealth Advisors Inc.	\$5M	\$2.37M \$1.3M	\$23.7K \$7.36M	\$3.68M	\$2.85M			12-20-2022	

#### Prospects (0)

No Prospects Found

[Add Prospect](#)

# ValuCompass - The Dashboard



## Firm Owner Dashboard

Here the blue banner across the top, which held the **Firm Profile**, has been hidden from view.

As the owner of a firm, who is also the only advisor, you can choose to have your firm view hidden. Please contact the ValuCompass support team and we will happily change this setting for you.

### Firm Features

- Show Firm Client List  
*For Firm Owners Only: List firm clients and basic data on firm dashboard view.*
- Hide Firm View  
*For Firm Owners Only: For account setup, check this option if the firm owner has only one advisor and the advisor is the same person as the firm owner. Assumes no additional advisors are required.*
- Bypass Add Advisor Paywall  
*For Firm Owners Only: Allow firm owner to invite advisors without contacting support. (for testing and development only)*
- Firm Lead Generation Panel  
*Enables lead generation panel for this firm.*

Firm Features is for Internal Use Only

### Tom White Dashboard

Advisor Profile									
Tom White	Cl/Pro 4/0	Revenue \$12.5M	Value \$7.06M	Fees \$30K	Insurance \$10.5M	AUM \$5.01M	401K	Team	
Clients (4) <a href="#">Add Client</a>									
	Revenue	Value	Fees	Insurance	AUM	401K	Team	Updated	
<a href="#">Johnny Ace</a> Ace Hardware	\$4M	\$3.28M \$1.38M	\$17K \$32.8K	\$6.12M \$12.2M	\$500K			01-02-2023	
<a href="#">Mary Main</a> Main Street Merchandise	\$2M	\$1.01M \$412K	\$10.1K		\$2.16M			01-02-2023	
<a href="#">Sally Speed</a> Speedy Sports	\$1.5M	\$396K \$229K	\$13K \$3.96K	\$651K \$1.3M	\$750K			01-02-2023	
<a href="#">Tom White</a> Wealth Advisors Inc.	\$5M	\$2.37M \$1.3M	\$23.7K	\$3.68M \$7.36M	\$2.85M			01-02-2023	
Prospects (0) <a href="#">Add Prospect</a>									
No Prospect Found									

# ValuCompass - The Dashboard



## Basic Firm Dashboard

As the firm owner, you may also just prefer to see just the basic information about your firm clients.

It is possible for our support team to modify your dashboard view so only the most relevant information about your firm clients appears.

### Tom White Dashboard

**Firm Profile**

Advisor Wealth Inc.	Advisors: 1	Cl/Pro: 4/0	Revenue: \$12.5M	Value: \$7.06M	Fees: \$30K	Insurance: \$10.5M	ALM: \$5.01M	401K	Team: 0	Employees: 87
---------------------	-------------	-------------	------------------	----------------	-------------	--------------------	--------------	------	---------	---------------

**Firm Advisors**

	Cl/Pro	Revenue	Value	Fees	Insurance	ALM	401K	Team
Tom White	4/0	\$12.5M	\$7.06M	\$30K	\$10.5M	\$5.01M		

[Add Advisor](#)

**Firm Clients**

	Advisor	Revenue	Employees	Updated
Johnny Ace	Tom White	\$4M	37	01-02-2023
Mary Main	Tom White	\$2M	25	01-02-2023
Sally Speed	Tom White	\$1.5M	10	01-02-2023
Tom White	Tom White	\$5M	15	01-02-2023

**Advisor Profile**

Tom White	Cl/Pro: 4/0	Revenue: \$12.5M	Value: \$7.06M	Fees: \$30K	Insurance: \$10.5M	ALM: \$5.01M	401K	Team
-----------	-------------	------------------	----------------	-------------	--------------------	--------------	------	------

#### Firm Features

- Show Firm Client List  
*For Firm Owners Only: List firm clients and basic data on firm dashboard view.*
- Hide Firm View  
*For Firm Owners Only: For account setup, check this option if the firm owner has only one advisor and the advisor is the same person as the firm owner. Assumes no additional advisors are required.*
- Bypass Add Advisor Paywall  
*For Firm Owners Only: Allow firm owner to invite advisors without contacting support. (for testing and development only)*
- Firm Lead Generation Panel  
*Enables lead generation panel for this firm.*

Firm Features is for Internal Use Only

# ValuCompass - The Dashboard



## Firm Owner Dashboard

If Advisory Wealth Inc. had other advisors within the firm, the owner Tom White would be able to see their progress from his dashboard.

As the firm owner, Tom White can individually view any advisor in the firm simply by clicking on their name.

### Firm Features

- Show Firm Client List  
For Firm Owners Only: List firm clients and basic data on firm dashboard view.
- Hide Firm View  
For Firm Owners Only: For account setup, check this option if the firm owner has only one advisor and the advisor is the same person as the firm owner. Assumes no additional advisors are required.
- Bypass Add Advisor Paywall  
For Firm Owners Only: Allow firm owner to invite advisors without contacting support. (for testing and development only)
- Firm Lead Generation Panel  
Enables lead generation panel for this firm.

Firm Features is for Internal Use Only

Account ▾

### Tom White Dashboard

#### Firm Profile

Advisor Wealth Inc.	Advisors 3	Cli/Pro 6/0	Revenue \$26.5M	Value \$14.2M	Fees \$30K	Insurance \$10.5M	AUM \$7.06M	401K	Team 0	Employees 829
---------------------	---------------	----------------	--------------------	------------------	---------------	----------------------	----------------	------	-----------	------------------

#### Firm Advisors

	Cli/Pro	Revenue	Value	Fees	Insurance	AUM	401K	Team	<a href="#">Add Advisor</a>
<a href="#">Tom White</a>	4/0	\$12.5M	\$7.06M	\$30K	\$10.5M	\$5.01M			
<a href="#">Tommy White Jr.</a>	1/0	\$6M	\$4.16M			\$2.05M			
<a href="#">Wendy White</a>	1/0	\$8M	\$3M						

#### Firm Clients

	Advisor	Revenue	Employees	Updated
<a href="#">Fanny Pack</a>	Tommy White Jr.	\$6M	553	01-02-2023
<a href="#">Johnny Ace</a>	Tom White	\$4M	37	01-02-2023
<a href="#">Mary Main</a>	Tom White	\$2M	25	01-02-2023
<a href="#">Peggy Patterson</a>	Wendy White	\$8M	189	01-02-2023
<a href="#">Sally Speed</a>	Tom White	\$1.5M	10	01-02-2023
<a href="#">Tom White</a>	Tom White	\$5M	15	01-02-2023

# ValuCompass - The Dashboard



## Business Owner Dashboard

The business owner also has a dashboard view if the advisor is set up for this feature. This is the same view that the business owner would see if their account is set up for them to log in.

This view offers features has buttons to edit the owner details, edit the business details, and all the toolkits assigned to this business or advisor.

All relative assessments, numbers, charts, and red flags are also available from the Business Owner Dashboard.

*Normally we do not recommend this capability since business owners prefer working with advisors.*

The screenshot shows the ValuCompass interface for a Business Owner Dashboard. At the top, it displays the ValuCompass logo and navigation links for 'Home Dashboard > Advisor Tom White', 'Help/FAQ', and 'Tom White'. The main section is titled 'Johnny Ace' and contains several data cards:

- Owner Overview** (with 'Edit Owner' button):

Owner Name	Fees	Insurance	AUM	401K	Flags	Updated
Johnny Ace	\$444 \$29.1K	\$104K \$208K	\$15K \$555		2	Mar 01, 2023
- Owner Toolkit** (with expand icon and '+')
- Business Overview** (with 'Edit Business' button):

Business Name	Revenue	EBITDA	Value	Potential	Gap	Flags	CoreValue
Ace Hardware	\$4M	\$400K	\$2.91M	\$4.66M	\$1.75M	3	53.0
- Business Toolkit** (with expand icon and '+')
- Charts** (with expand icon and '+')
- Red Flags** (with expand icon and '+')
- Suggested Tasks** (with expand icon and '+')

# ValuCompass - The Dashboard



## Account

All dashboards will come with a standard dropdown menu.

This menu includes:

- Settings
- Help
- Sign Out

Our Help feature offers a brief overview of some good places to start when using the program.

Obviously, the final menu item does exactly what it says it should, hopefully.

**ValuCompass**  
Demo

Account ▾

- Settings
- Help
- Sign Out

**Tommy White Jr. Dashboard**

**Advisor Profile**

Tommy White Jr.	Cli/Pro 1/0	Revenue \$6M	Value \$4.16M	Fees	Insurance	AUM \$2.05M	401K	Te
-----------------	----------------	-----------------	------------------	------	-----------	----------------	------	----

**Clients (1)** [Add Client](#)

	Revenue	Value	Fees	Insurance	AUM	401K	Team	Updated
<b>Fanny Pack</b> F. Packs & Bags	\$6M	\$4.16M \$2.3M	\$41.6K		\$2.05M			01-02-2023

**Prospects (0)** [Add Prospect](#)

No Prospects Found



## Settings

My Account Settings allows the user to edit various details of their ValuCompass account.

These includes:

- Full Name
- Phone
- Zip code
- Country
- Password

While users have the ability to “close” their account - it is NOT possible to change your email address.

Contact your administrator to create a new account under a different email address.

ValuCompass

Return Save < Previous

### My Account Settings

Full Name \*  
Johnny Ace

Email  
johnny\_ace@ace.hardware.com

Phone

Postal Code

Country \*  
United States

#### Other Actions

- [Change My Password](#)
- [Close My Account](#)



Thank you. This concludes our presentation.

We hope this information has been helpful. Please let us know if there is anything missing from this support document.