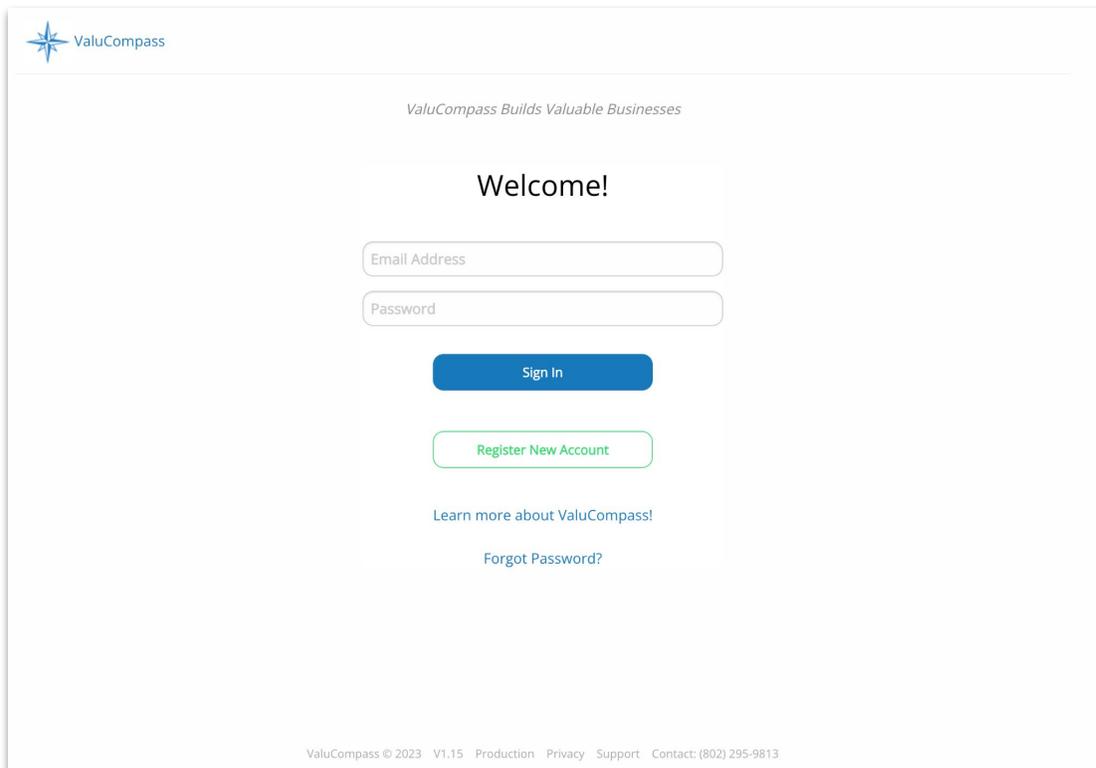


Learn how to add a new client on your dashboard.

Thanks for visiting ValuCompass Support.

Step 1.

Log into your ValuCompass Dashboard.

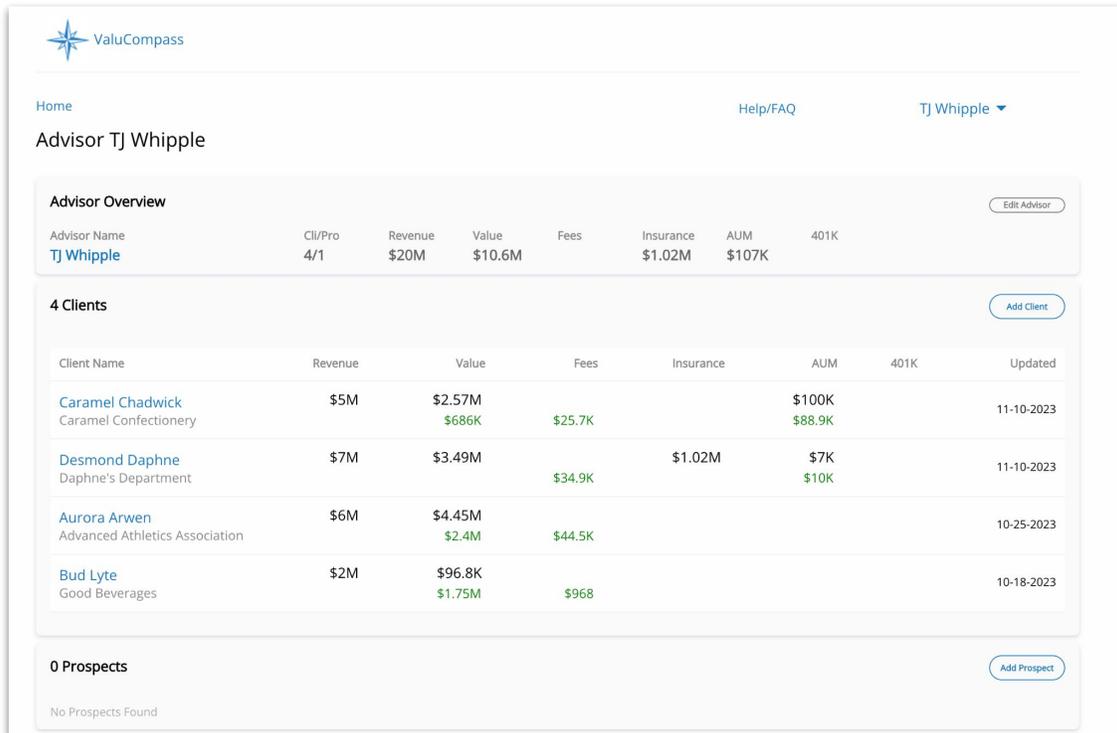


The screenshot shows the ValuCompass login page. At the top left is the ValuCompass logo. Below it is the tagline "ValuCompass Builds Valuable Businesses". The main heading is "Welcome!". There are two input fields: "Email Address" and "Password". Below these is a blue "Sign In" button, followed by a green "Register New Account" button. At the bottom of the form area are two links: "Learn more about ValuCompass!" and "Forgot Password?". The footer contains the text "ValuCompass © 2023 V1.15 Production Privacy Support Contact: (802) 295-9813".



Step 2.

From your Dashboard, click on either “Add Client” or “Add Prospect” depending on your preference.



ValuCompass

Home Help/FAQ TJ Whipple ▾

Advisor TJ Whipple [Edit Advisor](#)

Advisor Overview

Advisor Name	Cli/Pro	Revenue	Value	Fees	Insurance	AUM	401K
TJ Whipple	4/1	\$20M	\$10.6M		\$1.02M	\$107K	

4 Clients [Add Client](#)

Client Name	Revenue	Value	Fees	Insurance	AUM	401K	Updated
Caramel Chadwick Caramel Confectionery	\$5M	\$2.57M \$686K	\$25.7K		\$100K \$88.9K		11-10-2023
Desmond Daphne Daphne's Department	\$7M	\$3.49M	\$34.9K	\$1.02M	\$7K \$10K		11-10-2023
Aurora Arwen Advanced Athletics Association	\$6M	\$4.45M \$2.4M	\$44.5K				10-25-2023
Bud Lyte Good Beverages	\$2M	\$96.8K \$1.75M	\$968				10-18-2023

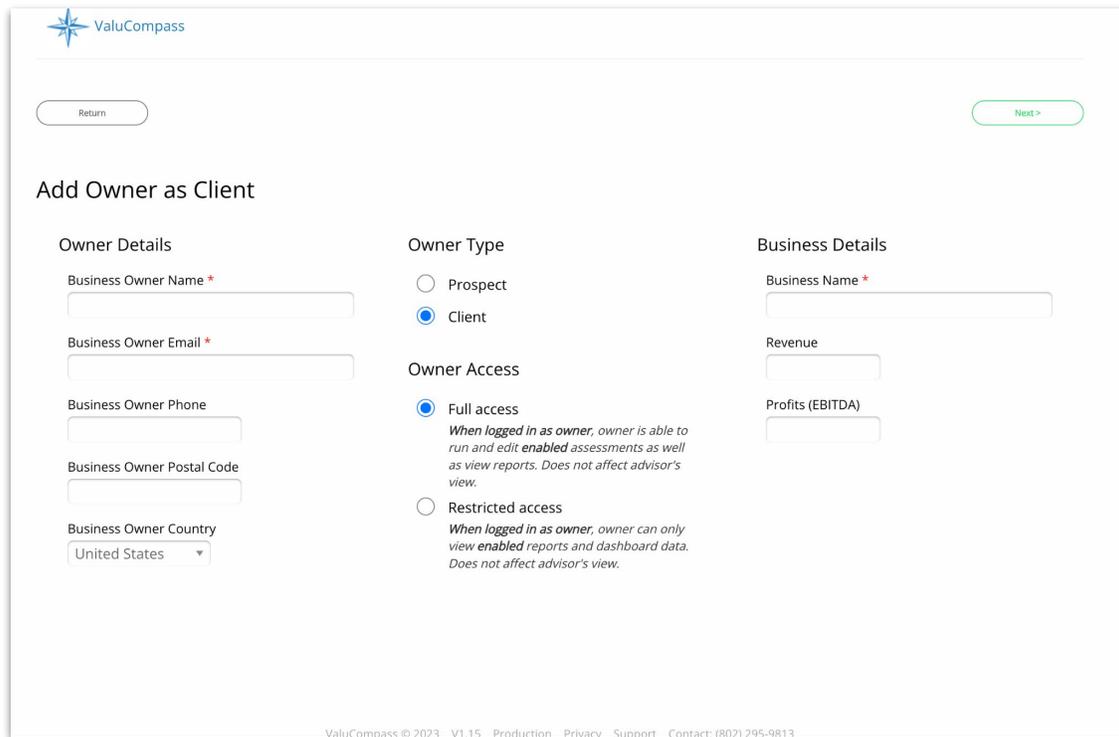
0 Prospects [Add Prospect](#)

No Prospects Found



Step 3.

Now fill out the three required fields: Owner Name, Owner Email, and Business Name. Then click “Done”.



Return Next >

Add Owner as Client

Owner Details	Owner Type	Business Details
Business Owner Name *	<input type="radio"/> Prospect	Business Name *
<input type="text"/>	<input checked="" type="radio"/> Client	<input type="text"/>
Business Owner Email *	Owner Access	Revenue
<input type="text"/>	<input checked="" type="radio"/> Full access	<input type="text"/>
Business Owner Phone	<i>When logged in as owner, owner is able to run and edit enabled assessments as well as view reports. Does not affect advisor's view.</i>	Profits (EBITDA)
<input type="text"/>	<input type="radio"/> Restricted access	<input type="text"/>
Business Owner Postal Code	<i>When logged in as owner, owner can only view enabled reports and dashboard data. Does not affect advisor's view.</i>	
<input type="text"/>		
Business Owner Country		
United States ▾		

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Step 4.

Return to your Dashboard and click on the name of the client or prospect that you just entered in order to edit the information or start the Discover Assessment.

Thank you.

Please let us know if you have any questions or need further assistance.

