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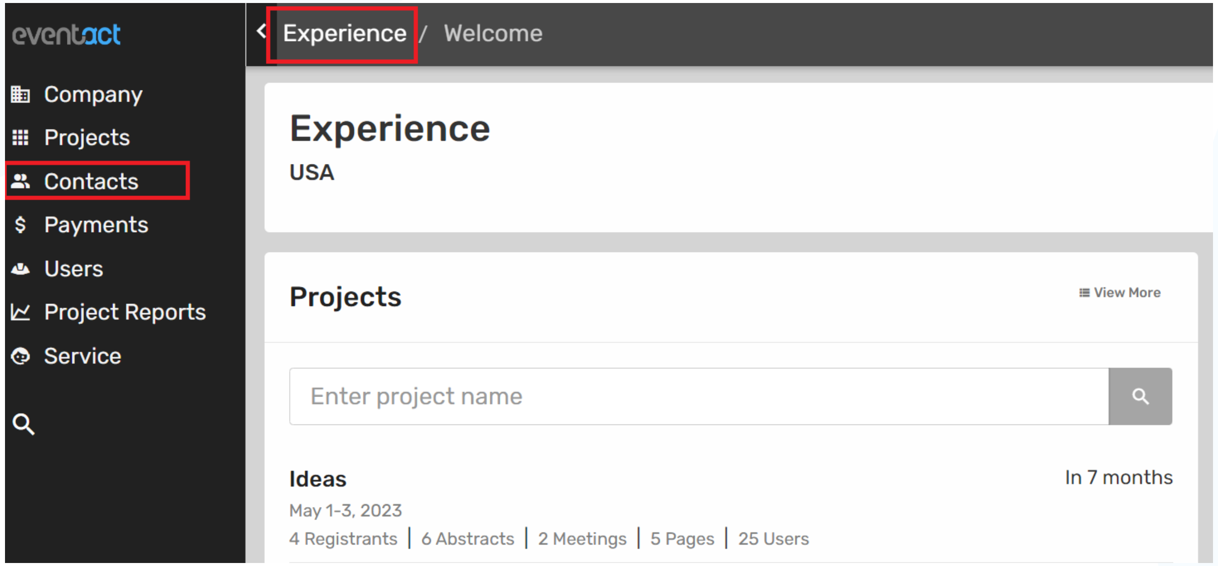
External Reports Link

If you want to allow someone to view specific data, there is no need to give them permission to the platform's back office. You can simply create a user for them to view specific reports.

Step 1 -

Add the user to your contacts. (if he/she is already a contact, skip to step 3).

Click on the company name and choose **Contacts,** then choose **Manage Contacts.**



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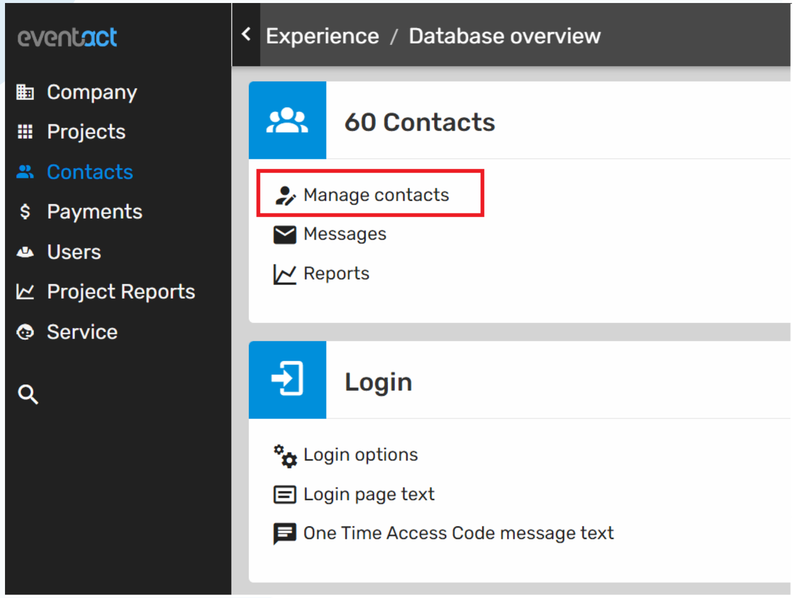
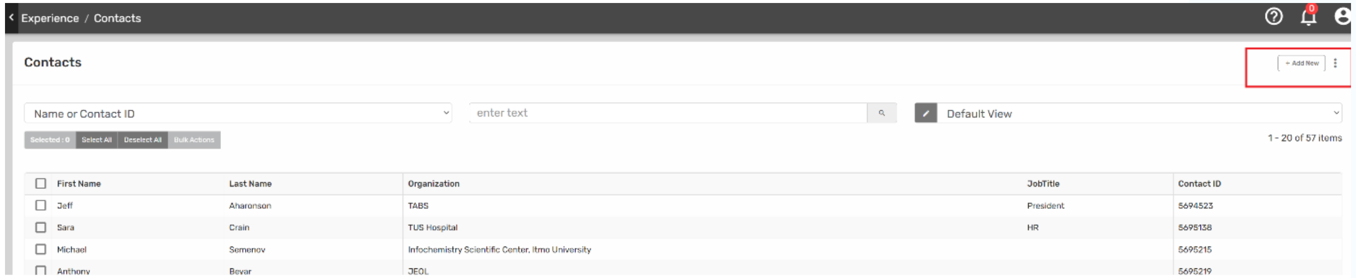


Step 2 -

Add a new contact, and fill in its details.



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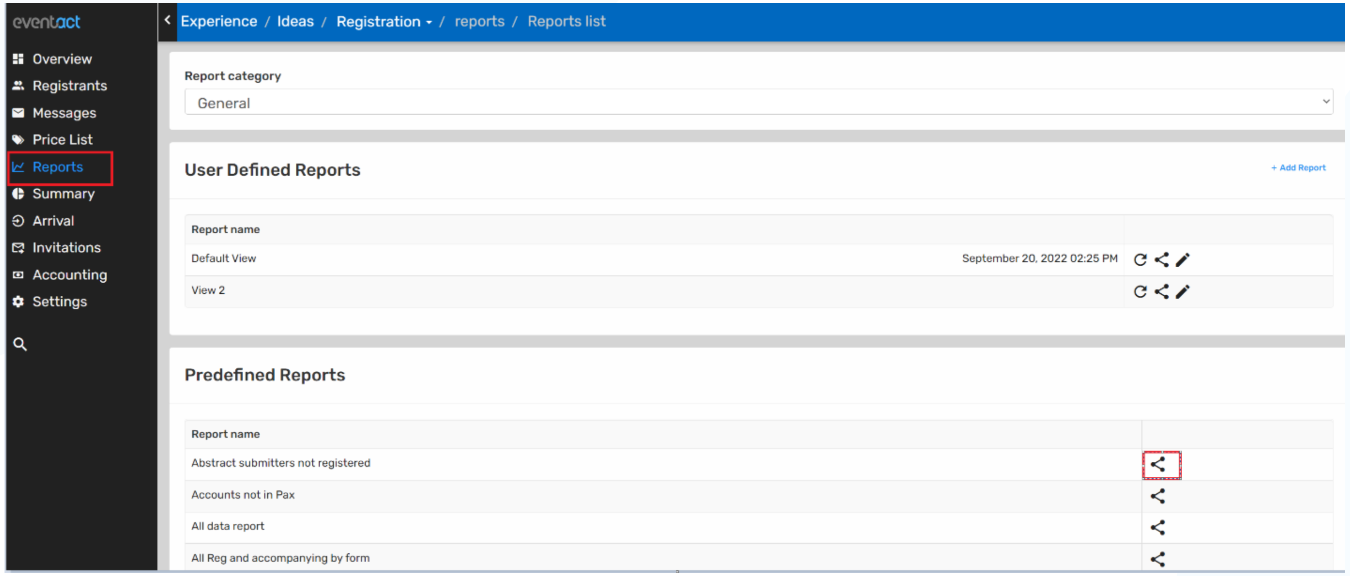
Step 3 -

Once the user is listed in your company's contacts, you can give them external access to a specific report (or more than 1).

Choose the relevant report from the reports list and click on the View icon -



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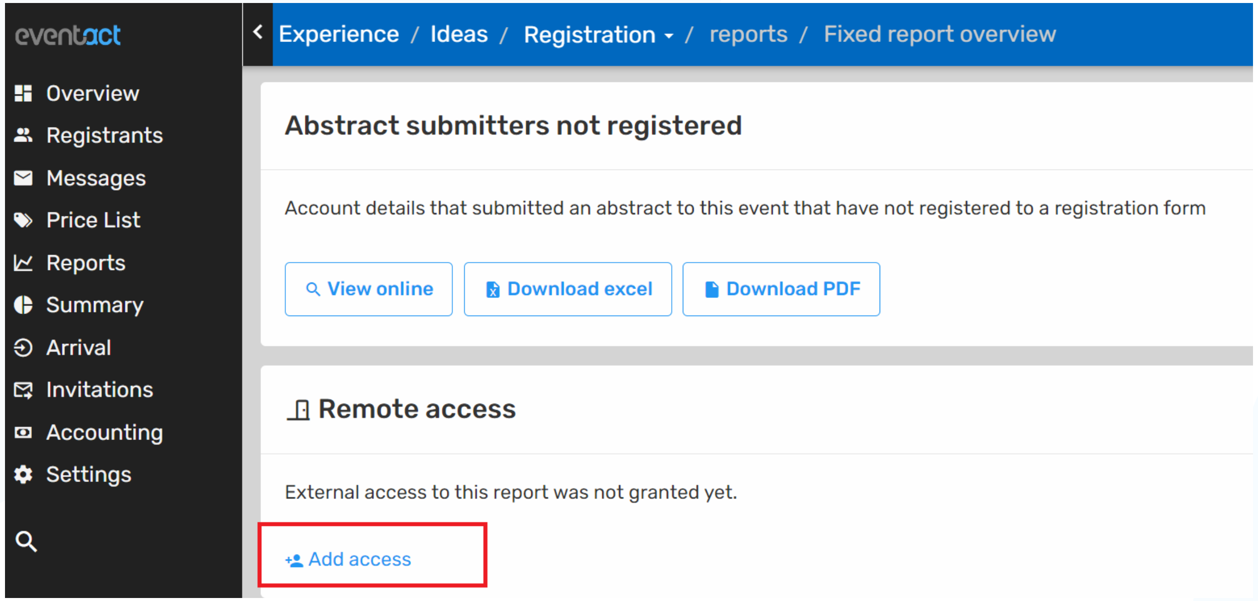
Now choose **Add access** and select the relevant contact from the contacts list.



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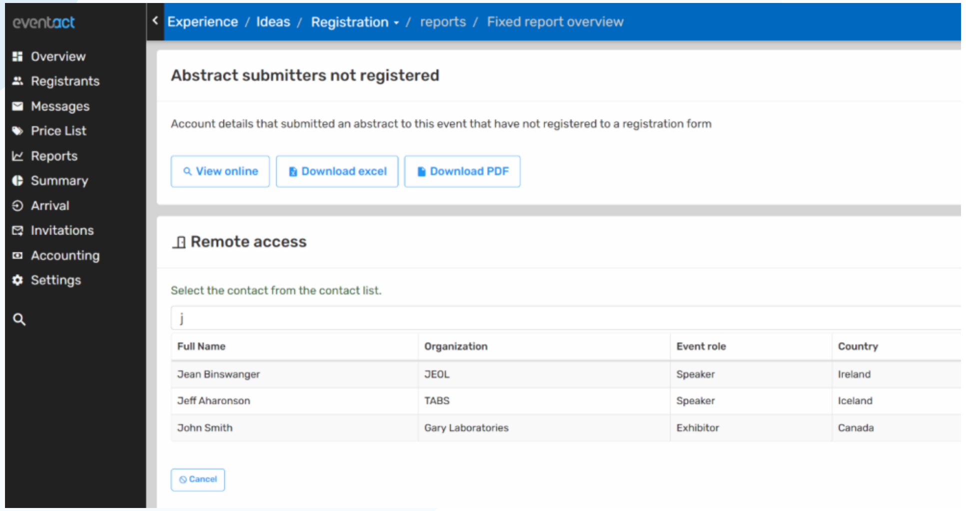
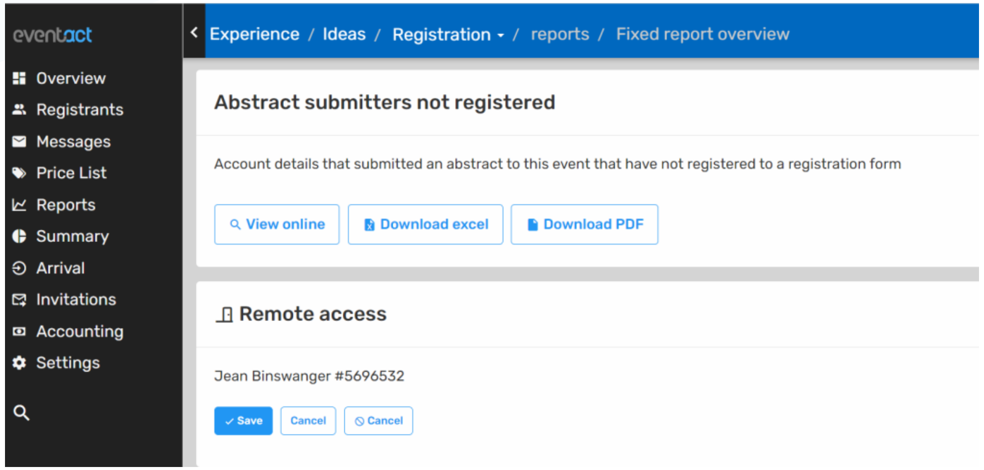


Once you chose a contact, save it.



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You can find the external reports link, at the bottom of the reports page. This link can be shared with the relevant contacts.