How to Share Financial Dashboards with Non-financial Admin Roles

Clients want to share financial dashboards with non-financial users without assigning a financial role. To do this, users can utilize the Schedule Report feature or the Shareable Link feature of the MSPbots dashboard and share the dashboard between users with different permissions and roles.

This article shows how to use the **Schedule Report** feature to send a PDF copy of the dashboard via email to share the financial dashboard with non-financial administrators.

What's on this page:

Prerequisites

- Access to the MSPbots Dashboards.
- The email address(es) to where the report will be sent.
- Admin permissions to share dashboards

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- To share reports in PDF format via email, follow the procedure in the Knowledge Base article below: How to Create Scheduled Reporting for Dashboards and Reports.
- Another option is to Share a Dashboard Using the Shareable Link which allows users to view dashboards on their browsers.

Related Topics

- How to Add Your Screen to the MSPbots Device List
- How to Share A Dashboard Using the Embed Function (HTML)
- Presenting Dashboards Using the Rotating Dashboard View
- How to Share a Dashboard Using the Shareable Link Function
- Sharing Dashboards Using the Stream to TV Function
- How to Create a Shared Public Dashboard
- Client Portal Management