MYINTELLISOURCE

STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLIACCOUNT ANDROID

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REGISTERING WITH MYINTELLISOURCE

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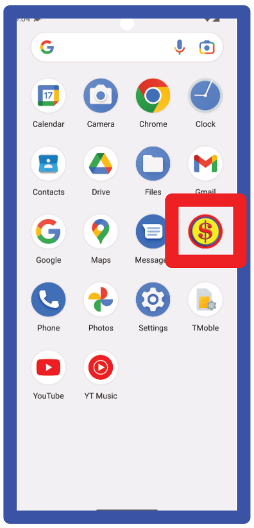
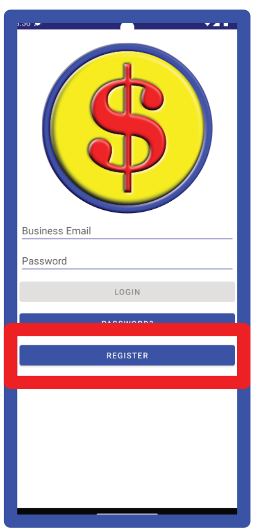


The first thing to do to begin registering with MyIntelliSource is to locate and launch MyIntelliAccount after you install the application.



Upon launching MyIntelliAccount, the first task you need to complete is registering with MyIntelliSource. This is accomplished in the Android application by clicking on the "Register" button on the login screen.

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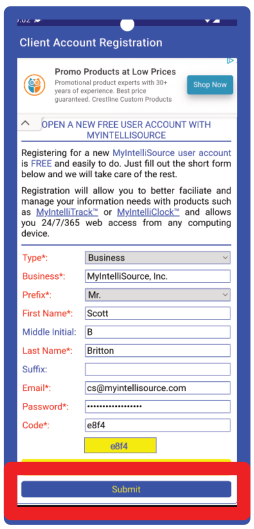
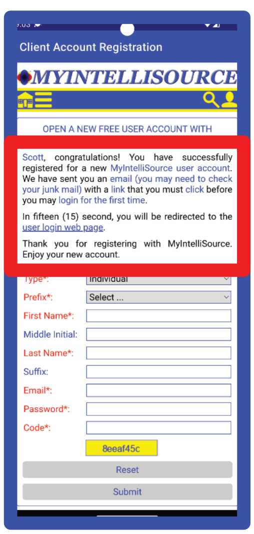


Upon clicking the “Register” button, this will open a webpage to the MyIntelliSource customer registration page. You need to complete the form by filling in the required fields in red; blue fields are optional. Once you are finished, click the submit button at the bottom of the registration page.



If your registration submission is successful, you will receive this notification. Before you can log in, you must go to your email inbox and click the embedded link contained in an email the system sent to you to verify you actually created the account. Once you verify your account, you can login.

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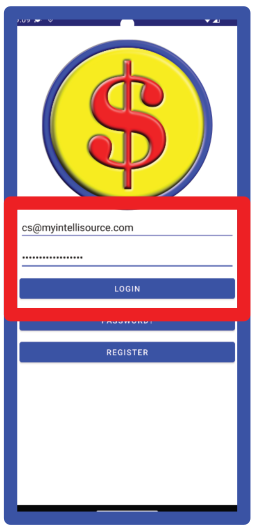

Go back to the login screen and type your user name (email) and password and click the “Login” button.

Logging in will take you to the MyIntelliAccount home screen, where your journey begins. For future reference, to exit MyIntelliAccount, click the “Log Out” button beneath the logo.

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SETTING UP THE APPLICATION

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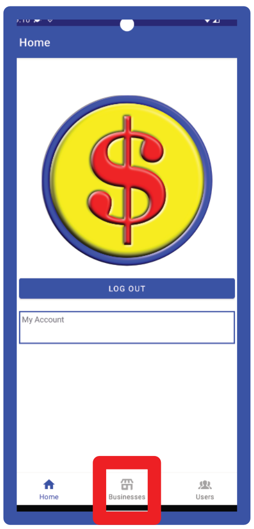
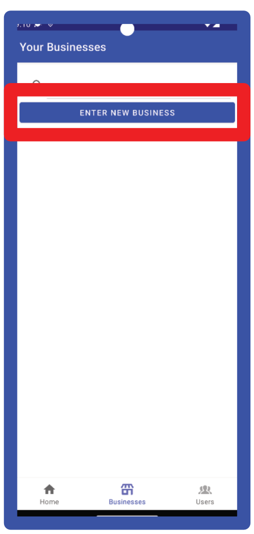


To begin using MyIntelliAccount, you must first create a business. On the lower tab bar, click the icon labelled “Businesses”.



As you can see to the left, you currently have no business information entered. To enter business information, click the “Enter New Business” button.

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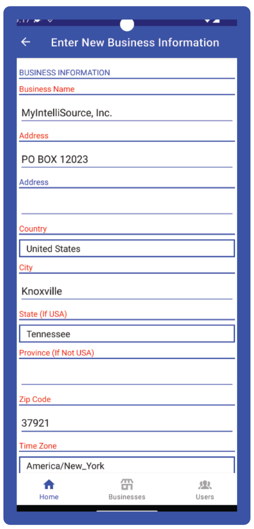
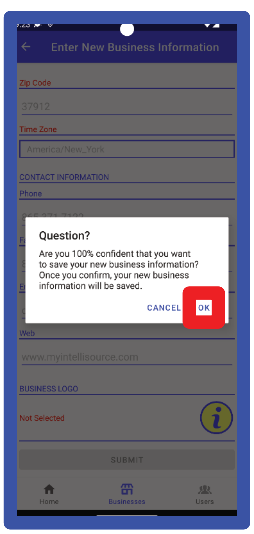


Upon clicking the "Enter New Business" button, you are forwarded to the screen to create a new business in MyIntelliAccount. Fill out the required fields in red; the fields in blue are optional. After you are finished, scroll down and click the "Submit" button (currently not in view).



Upon clicking the "Submit" button, MyIntelliAccount will confirm that you want to create the new business. To create the new business, hit the "OK" button in the dialog box.

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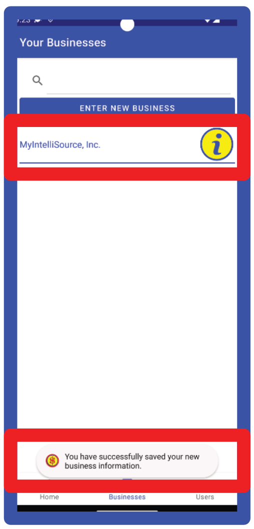

Upon successful submission of your new business information to the MyIntelliSource server cloud, you will be transported back to the business list. In addition, you will get a message at the bottom of the screen saying you were successful.

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SETTING UP CUSTOMERS AND VENDORS

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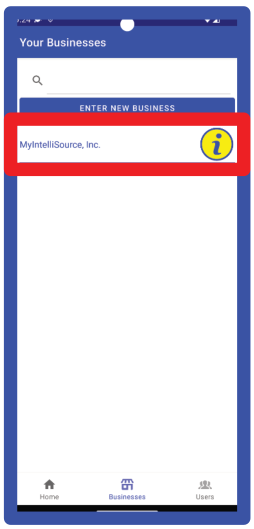

To begin creating customers and vendors, go to the business list and select the desired business to add customers or vendors.

Clicking a business row brings you to the business home screen for that business. To create a customer, you click on the “Customers” tab bar option in the lower tab bar.

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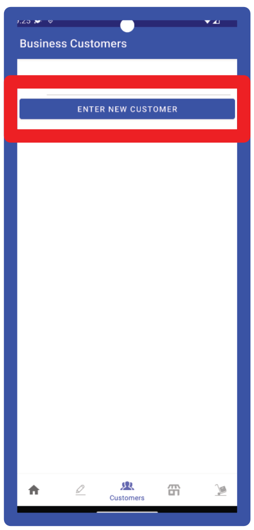
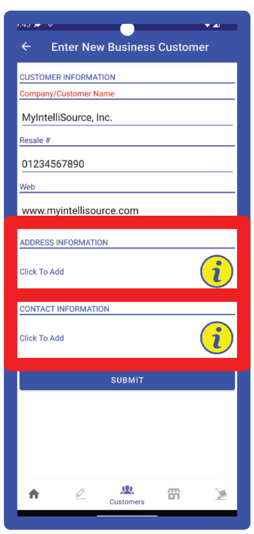


Currently, you have no customers entered in MyIntelliAccount. To enter a new customer in MyIntelliAccount, click the “Enter New Customer” button.



This is the first of three screens used to create customers. In this screen, you enter the base customer information. The only field required to create a customer is the “Company/Customer Name” field; all other fields are optional. To add address information and contact information for the customer, click the associated row for each.

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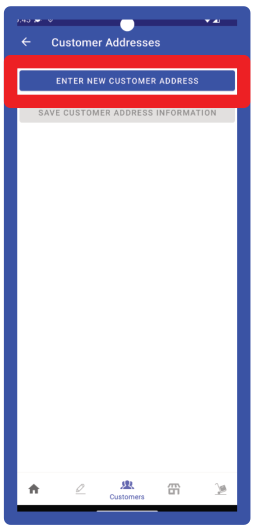
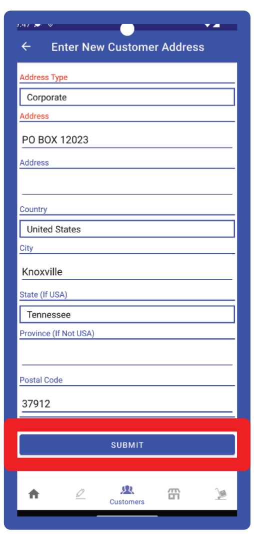


Starting with customer addresses, you click the address row and you are presented with the second screen where rows of customer addresses would be if you had any entered. To enter a new customer address, click the “Enter New Customer Address” button.



A third screen is presented and this is the screen where you enter your customer address information. The fields in red are required; the fields in blue are optional. After you have entered your desired customer address information, click the “Submit” button to save the address information.

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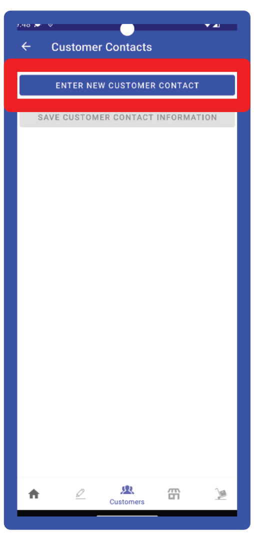
Clicking to save customer address information takes us back to the second screen and as you can see, the new address information is listed although abbreviated. If you want to enter another new customer address you can. To save all customer address information to the base customer information, click the “Save Customer Address Information” button.



Similar to the operation of the address information, contact information is added in the exact same method. The second screen lists rows of contacts. If you click on the “Enter New Customer Contact” button, you may enter a new customer contact.

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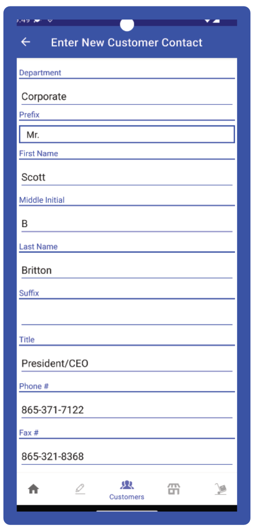
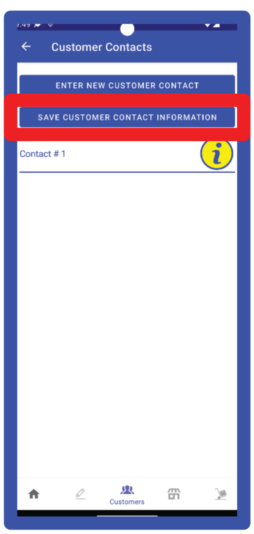


This is the third screen of the contact information. All fields in this screen are optional, but you must enter at least one field to save. Once you have entered your desired customer contact information, click the “Submit” button (currently out of view) to save.



Once you save your customer contact information, you are transported back to the second screen where you can choose whether to enter another customer contact information or save the current customer contact information to the customer base information. To save the current customer contact information to the customer base information, click “Save Customer Contact Information”.

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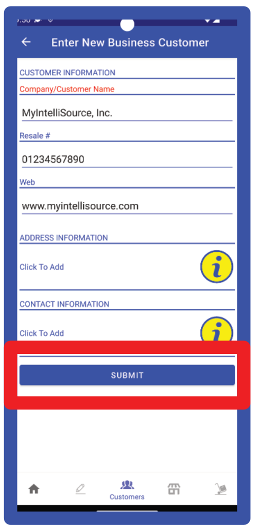
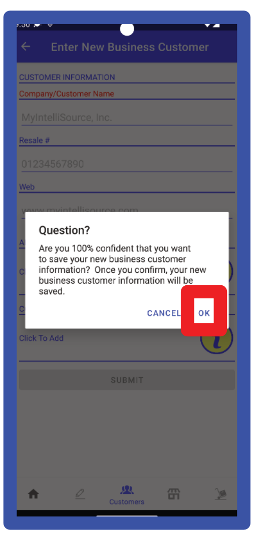


Once you have entered all your customer base information, customer address information, and customer contact information, click the “Submit” button to save the information to the MyIntelliSource cloud servers.



MyIntelliAccount will ask to confirm the saving of your customer information to the MyIntelliSource server cloud. Click “OK” to proceed.

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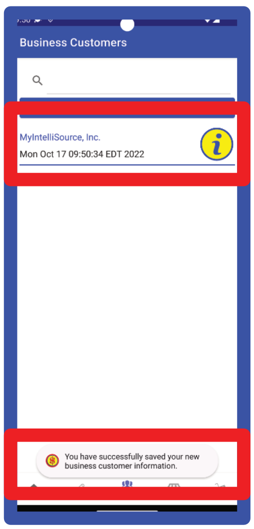
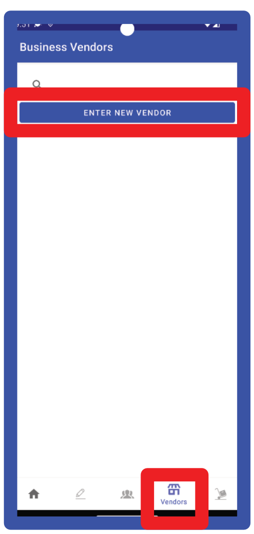


Upon successfully saving the customer information to the MyIntelliSource server cloud, you will see the row of customer information and you will also get a message at the bottom of the screen confirming the successful save.



Entering business vendors is identical in nature to entering business customers. Instead of clicking the “Customers” tab bar option, you click the “Vendors” tab bar option. As you can see, you have no vendors currently in the system. To enter vendor information, click the “Enter New Vendor” button.

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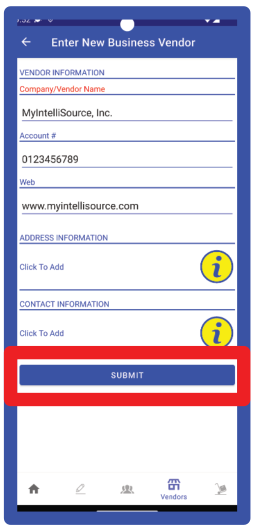

Similar to the customer information, the only field that is required to enter a vendor is the “Company/Vendor Name” field; all other fields are optional. Adding vendor address and contact information is virtually the same. After you have entered your desired vendor information, click the “Submit” button to save it to the MyIntelliSource server cloud.

This is an example of the vendors list after you have entered a company as a vendor. If you click the row of vendor information, it will display the Vendor home screen for the vendor in question.

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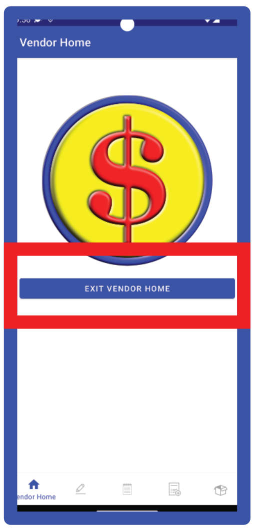

If you click a vendor row, you will be transported to the vendor homepage for that vendor, where you can edit the vendor information, enter vendor notes, purchase orders, and receiving reports. To exit the particular vendor, click the “Exit Vendor Home” button.

Similar to the Vendor home screen, the Customer home screen form clicking a particular customer row allows you to edit the customer’s information, and enter customer notes, estimates, invoices, payments, and shipments. To exit the Customer home screen, click the “Exit Customer Home” button.

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INVITING AND ADDING USERS

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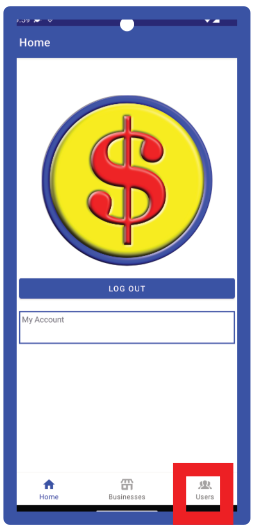
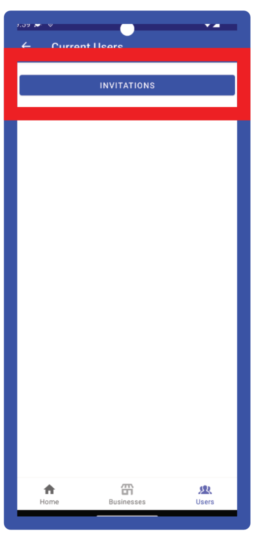


To set up MyIntelliAccount into multi-user mode, from the application home screen, click on the “Users” tab bar option on the lower tab bar.



Clicking the “Invitations” button triggers MyIntelliAccount to load the MyIntelliSource subscription system if the user is not already subscribed. Multi-user mode is a per user monthly subscription service and allows multiple users to use your account within the parameters you set.

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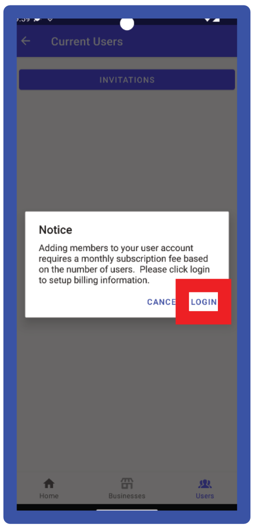
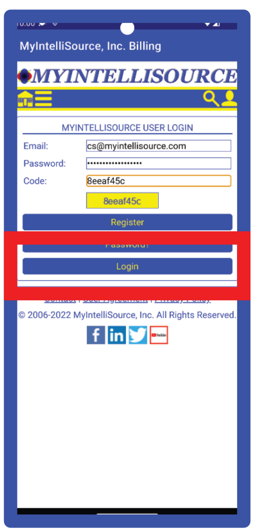


If you are not already subscribed, you must login to the MyIntelliSource billing system to setup a monthly subscription for multi-user mode. Clicking the “Login” button brings up the MyIntelliSource web site login screen where you will login and then be transported to the billing system.



Enter your login credentials and the security code in the yellow box to login into the MyIntelliSource server cloud to set up billing.

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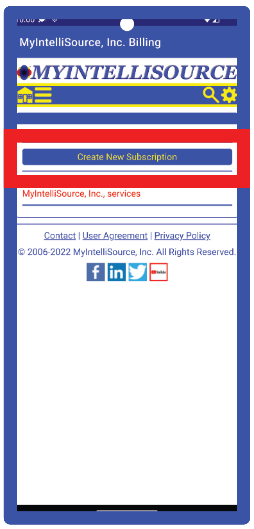
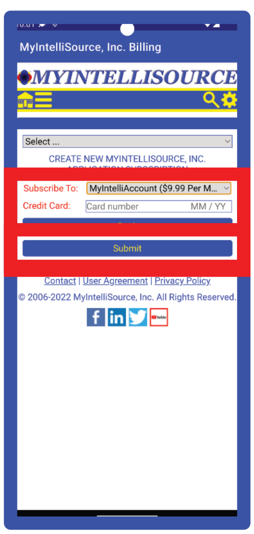


You currently have no MyIntelliSource monthly subscriptions in place. To create a new monthly subscription for MyIntelliAccount, click the "Create New Subscription" button.



To subscribe to MyIntelliAccount and unlock multi-user mode, select "MyIntelliAccount" from the "Subscribe To" drop down menu, enter your credit/debit card information, and then click "Submit".

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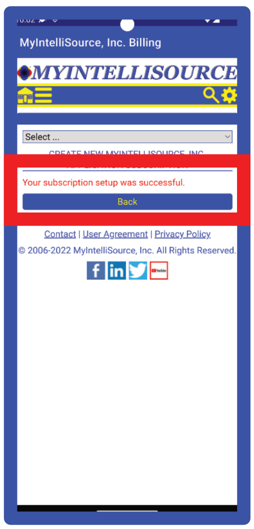
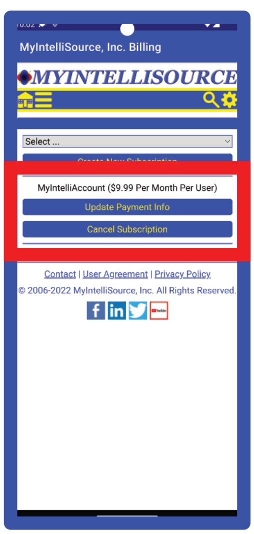


If you are successful in creating a monthly subscription to MyIntelliAccount, you will receive this screen. If you click the "Back" button, you will see your subscription and may manage it from there.



Your monthly subscription is highlighted here with the "Update Payment Info" button and the "Cancel Subscription" button. You may update your payment information or cancel your subscription at any time.

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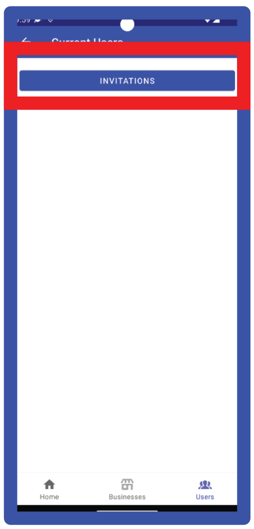
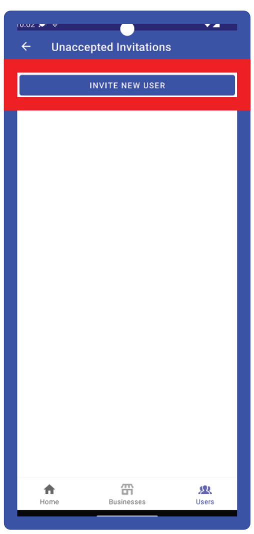


If you exit the browser window and reclick on the “Invitations” button, you will be forwarded to a list of current unaccepted invitations and may send an invitation to a target user.



To invite a new user, click the “Invite New User” button inside the list of unaccepted invitations by users.

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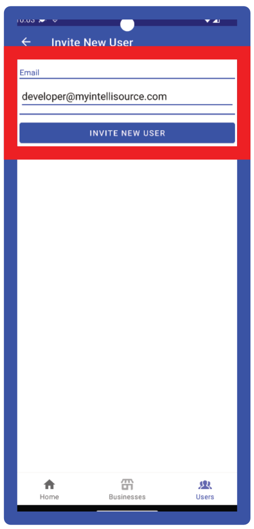
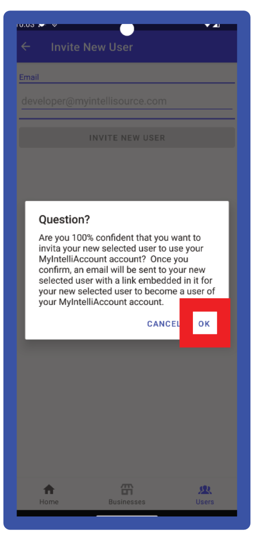


To invite a new user, enter his/her email into the section and click the “Invite New User” button. MyIntelliSource’s server cloud will send out an invitation email with an embedded link for the user to click. Once the user clicks the link and registers or logs in, your subscription will automatically be updated, but only after the user registers or logins from an invitation email.



The system will ask you to confirm your new user to receive an invitation email. Click “OK” to send the invitation email to your target user.

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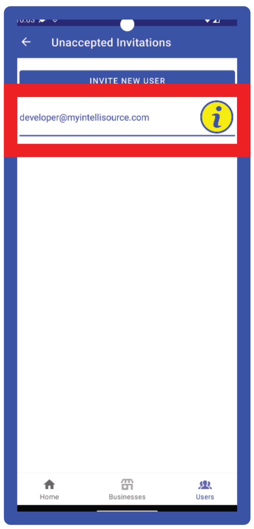
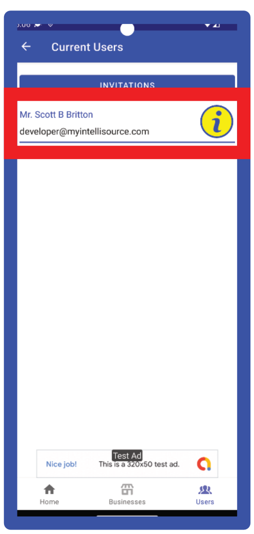


Once you confirm the target user's invitation, you will be transported back to the unaccepted invitation's list where you will see your new invitation.



Once the user accepts the invitation and registers or logs in, the selected invited user will be listed in current users. Initially, the user will have no permissions to any of your business(es) and you will need to grant permissions as you desire.

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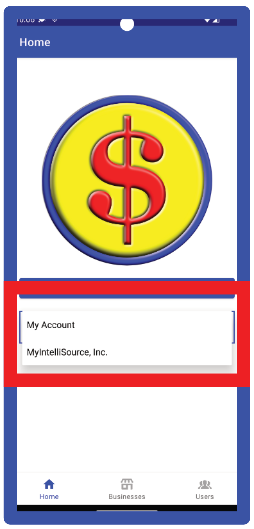
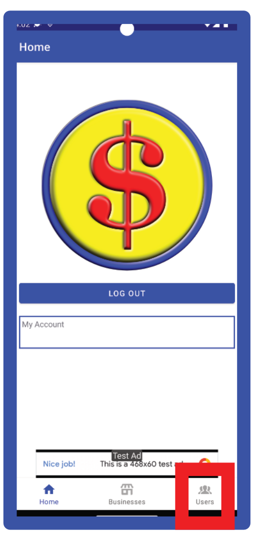


If you log in as the invited user, on the application home screen. You click the drop down selection box beneath the “Log Out” button, you will now see two accounts, the invited user’s primary account and the guest account. Selecting the guest account allows the invited user to make entries into your business information within the permissions you grant him or her.



If you log out of the invited user account and log back in as the original user. You go to the “Users” tab bar option. You may manage our invited user’s permissions and access to your business information.

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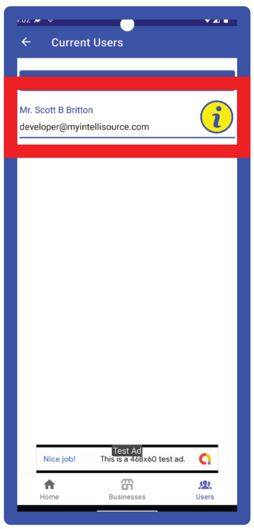
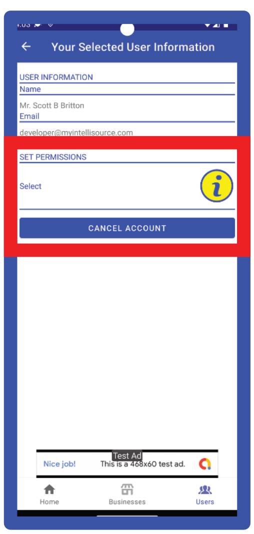


To manage an invited user's access and permissions, click the user row inside the current user's screen.



From the selected current user screen, you can either cancel the invited user account and remove all access or you can select to set permissions to different parts of the MyIntelliAccount application.

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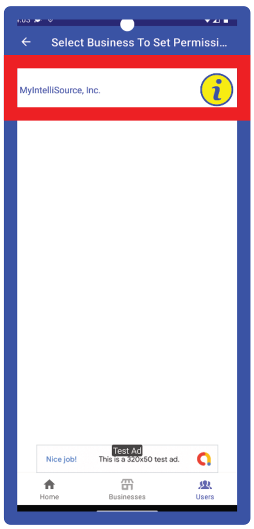
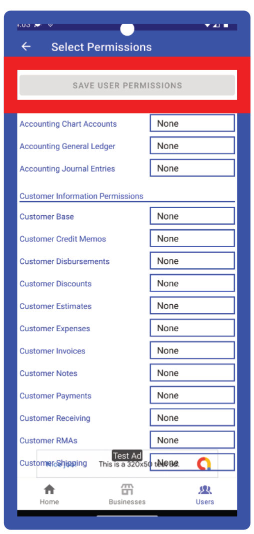


To set permissions and access for an invited user you must first select the business that you would like to grant/deny access and permissions.



To set user permissions, select the target area where you would like the invited user to have access and change the drop down box to grant or deny permission. The default permission is none. Once you are satisfied with your invited user's permissions, click the "Save User Permissions" button and the invited user's permissions go into effect immediately.

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CONTACT INFORMATION

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