Tradepoint Setup & Getting Started Guide

2009

The Setup Guide is designed to assist new customers in getting started with the most popular Tradepoint tools.

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INTRODUCTION

Designed to walk new customers through setting up Tradepoint for the first time or enabling current customers to expand their usage of Tradepoint, the Setup Guide explains step by step how to establish your company structure and Employee profiles with explanations of each function of the setup process.

The setup process and how your company's information is defined provides the basis for making the most of what Tradepoint can offer your business. Whether you have one company with no divisions or multiple companies with multiple divisions Tradepoint can accommodate a variety of structures while retaining the autonomy of each type of organization.

INSTALLATION

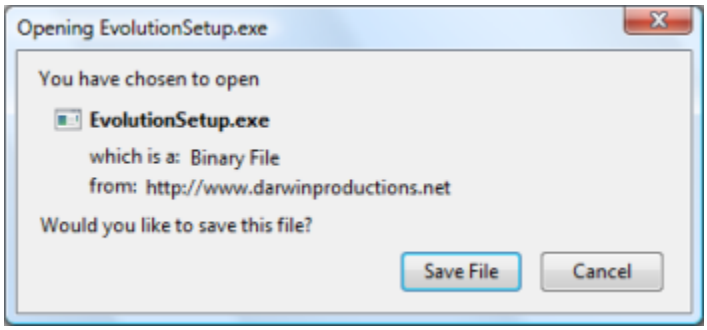
FIRST TIME INSTALLATION

Tradepoint's installation will walk you through a step by step wizard to install for setup on a desktop or laptop.

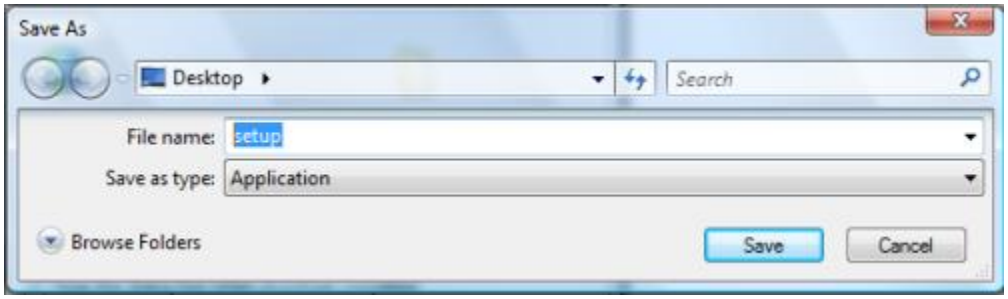
The installer link for Tradepoint is:

http://www.darwinproductions.net/Tradepoint/TradepointSetup.exe

You will be prompted with an option to save this file.



Choose 'Save File'. For companies loading Tradepoint onto multiple machines install this file on each machine that will have Tradepoint. The file size is 110 mb and download time will vary depending on Internet connection. *Wireless Internet connections can fluctuate therefore, we recommend a direct Internet connection for the fastest download time.*



Save the Installer File somewhere it will be easy to remember. After the download is complete run the installer file.

Vista users will have the file saved within downloads and Windows XP users will likely see an icon on the desktop of in the location on the PC where it has been saved.

After it has been downloaded choose run to start the installation wizard. The wizard will walk through the steps to install Tradepoint completely on your computer.

After the main components have been installed you will be directed through several screens to establish network Settings and then setup a company structure and an Administrator login.

Network Setup

Network Settings will be the first step in the Installation wizard. Below are recommended guidelines. If you are not sure which ones to choose speak with your IT Professional.

Network Setup – This option is recommended for computers networked users who are stationary in an office or one location. Synchronization will be instant between Networked computers.

Remote User – This is recommended for laptops and computers that will be mobile as remote users. Synchronization will need to be established at a given interval to be setup under Terminal Settings.

Administrator Password/Login

The next step will be to establish and Administrator login. This should be setup with a password that can be remembered however, This profile will be used for Administrative purposes and the informational setup of Tradepoint within your company.

Company Setup

The wizard will prompt for basic information about your company and if you use any Divisions during this process. If you are unsure about the use and structure of Divisions then enter in the basic contact information and click no to the options about General Ledger template options.

Company information and details about Division information and additional Company details can be done after the installation is complete using the data import tool.

License Key

After your Company contact information has been entered, your company will be registered with Tradepoint. In most cases a software license key will have already been generated and it can be entered into the setup screen when prompted.

After the license key has been entered Tradepoint will update to the latest version available.

Establishing the remaining settings and preferences for your company is explained in detail in this Setup Guide in the Company and Employee Setup sections.

Restoring Tradepoint on another Computer or Installing Tradepoint on a New Computer

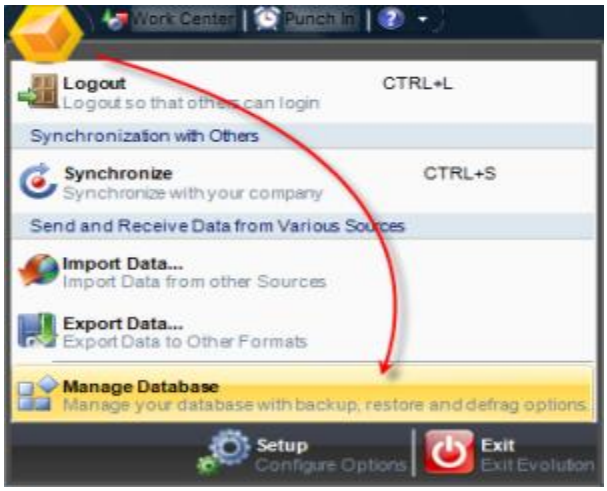
To restore or install Tradepoint on a new computer or additional computer the Installer file will be installed on the computer as well as a remote backup of your company's information.

Creating a Remote backup Set

Creating a Remote Backup Set of an existing company's information is done through a login with Administrator access.

Click on the management Menu when logged into Tradepoint. This is the orange cube in the upper left corner of the screen when logged into Tradepoint. 

Choose the Manage Database option in the menu.



From the Manage Database options in the next menu choose the 'Restore an Existing Database' option.

The next screen will direct you to create a New Remote User Backup Set and save it to a location where is can be accessed.

There will be an expandable menu in this screen. The name of the file can be changed from the default you see. Save the backup file to an easily accessible location.

The easiest option is to save it to a zip file or thumb drive and then transfer the file to the computer which will have Tradepoint restored. FTP access or file sharing tools for networked computers are also ways that a backup file can be transferred to another computer.

Once the file location has been chosen click the Save icon and the backup file will be created in

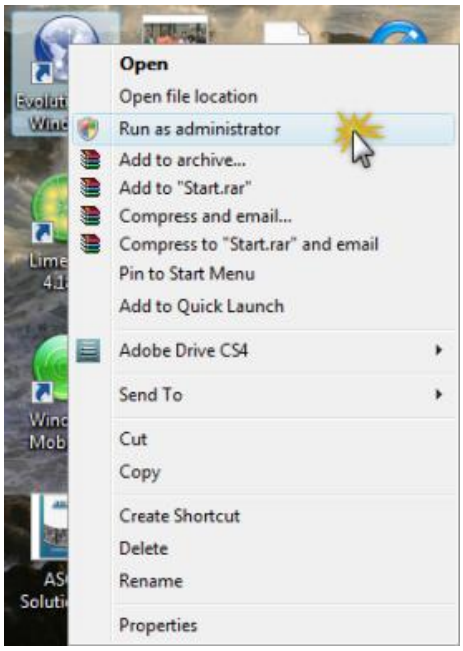
that location.

RESTORING/INSTALLING TRADEPOINT ON ANOTHER COMPUTER

To restore Tradepoint on a new computer the Installer file will need to be installed up to the steps of having the Tradepoint icon on the desktop and a backup file from the Company will also need to be installed on the computer.

Once both of these files have been downloaded on the computer then we can restore Tradepoint on another computer and Company access to Tradepoint.

1. From the desktop click the Tradepoint icon to start the installation/restore process. (For Windows Vista users right click on the Tradepoint icon and choose 'Run as Administrator'. This will only have to be done the first time Tradepoint is installed.)



2. Tradepoint will configure settings and bring up the setup screen with the four options for the different types of Tradepoint user configuration.

   a. Install as Stand Alone User
   b. Install as Network User
   c. Install as Remote User
   d. Install in Demonstration Mode for the 30 day demonstration trial.

3. If the machine you are restoring Tradepoint on is a laptop that will be mobile then choose 'Install as Remote User' If the computer that will have Tradepoint restored on it will be part of a network then choose 'Install as a Network User'.

4. The following screen will prompt you to look for the restore file.

5. Highlight the file. (Make sure the file you are highlighting has the extension .bak in case it was compressed. An error will be generated if a file with .rar or ,zip is used)

6. Click the Next icon. Tradepoint will restore the file and then check for updates. This process can take a few minutes depending on the speed of the Internet connection.

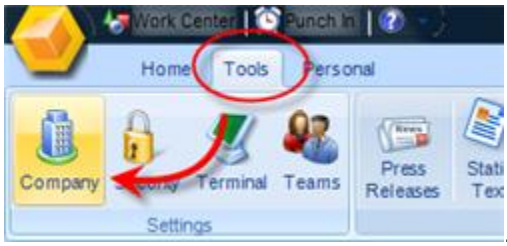
7. When finished you will be directed to the login screen for Tradepoint.

Company & Division Setup

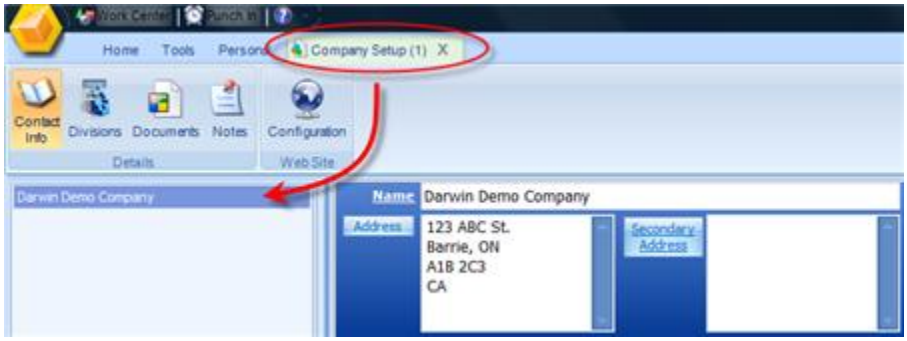
One Company with one Division

Many companies, especially smaller to mid-sized businesses will belong to this category. When Tradepoint is installed for the first time, this option is the default at the time of installation unless otherwise specified. *Additional companies and/or Divisions can always be added after the original installation.*

Company Setup is found within the Company icon under the Tools tab



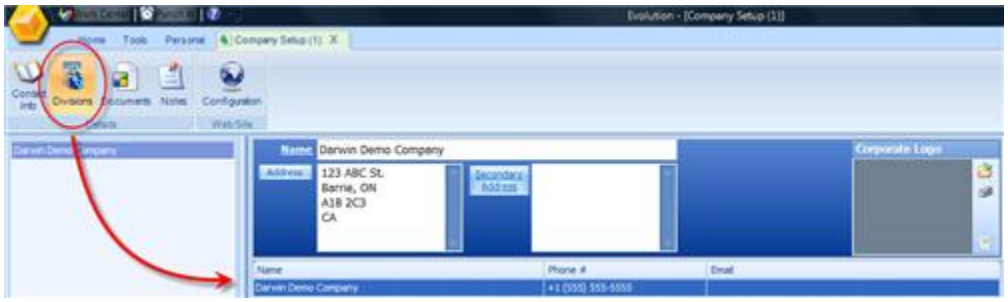
Within company settings screen is where you set up the main company. The contact information screen is where you will be directed initially. This example shows one company. When you login to Tradepoint for the first time to set up any remaining company settings your company settings will look similar to this of you have one company.



The highlighted tab at the top will show the number of listed companies listed in Tradepoint in parenthesis.

Accessing the details of a company is done by clicking on the Divisions tab next to the Company icon you see in the view above.

With a One Company/One Division structure you will see a view similar to the view below.



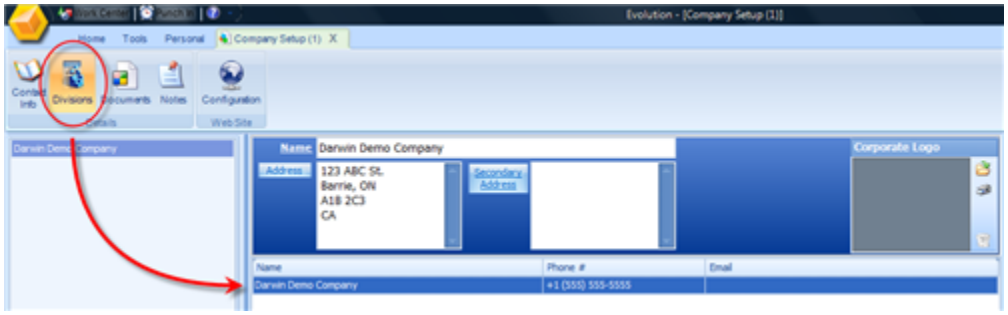
This structure allows for you to be able to add companies or divisions within a company later should you add them. This also provides a layer of added security in addition for your corporate information.

Within the Company Settings screen here there will be a 'New' icon in the lower left. This icon will create a New Company.

On the lower right there will be a 'New Division' icon. This icon will create a New Division within an existing Company.

Clicking the escape key at any time will allow you to back out of the current screen you are in.

To access the Company information simply double-click or highlight the listed division within a company and click the Edit icon highlighted in the lower right.



The main screen within the company division will show this tool bar.

When the company contact information is entered into the company or Division screen is sure to add the correct and complete postal/zip code.

The postal/zip code is the main key that Tradepoint uses to track specific activity with Customers with A Company. It is also how the correct Sales Taxes and shipping information is tracked to each Customer account and action.

One Company with multiple Divisions

One company with multiple divisions is often seen with companies that have two companies which are linked and even share Inventory or other resources yet need to keep separate General Ledgers for each while retaining the capability of reporting on activity within a given Division or 'rolled up' under the 'Parent' company. An example would be a company with both a retail and wholesale division sharing an Inventory.

The view of one Company with more than one Division looks like this from the Company Screen after clicking on the Division icon.

Tradepoint supports an unlimited number of Divisions within each company.

Accessing the company information for a Division is done by double clicking on that listed Division or by highlighting and clicking on the Edit icon in the lower right of this Divisions screen.

Creating multiple divisions within one company is done from the main company screen with the 'New Divisions' icon.

A pop-up menu is part of the New Division icon with options for what type of Division can be created. If you are not sure then just choose the top option for a 'New Blank Division'. The rest of the options will set up defaults in your preferences of your Division you are creating. They can be adjusted after a Division has been set up.

Multiple Divisions within one company will be listed within the main Company screen.

Company details of your new Division can be accessed by double clicking the listed Division or highlighting a Division and clicking the Edit icon in the lower right of the Divisions screen.

Multiple Companies

This structure is often seen with separate companies that are affiliated or owned by one or a group of individuals who may be operating more than one company. In a case where multiple companies are in related or diverse industries and still require their own completely independent structures.

The view below shows multiple companies with one Division.

Each company is listed to the left and the highlighted company shows the one related division for the highlighted company.

To create an additional company in Tradepoint, click on the 'New' icon in the lower left corner.

Should you need to delete a company there is a double delete alert that will prompt you twice about deleting the company. You will also need the administrator password that was established the very first time you installed Tradepoint because you will be prompted for it.

Multiple Companies each with Multiple Divisions

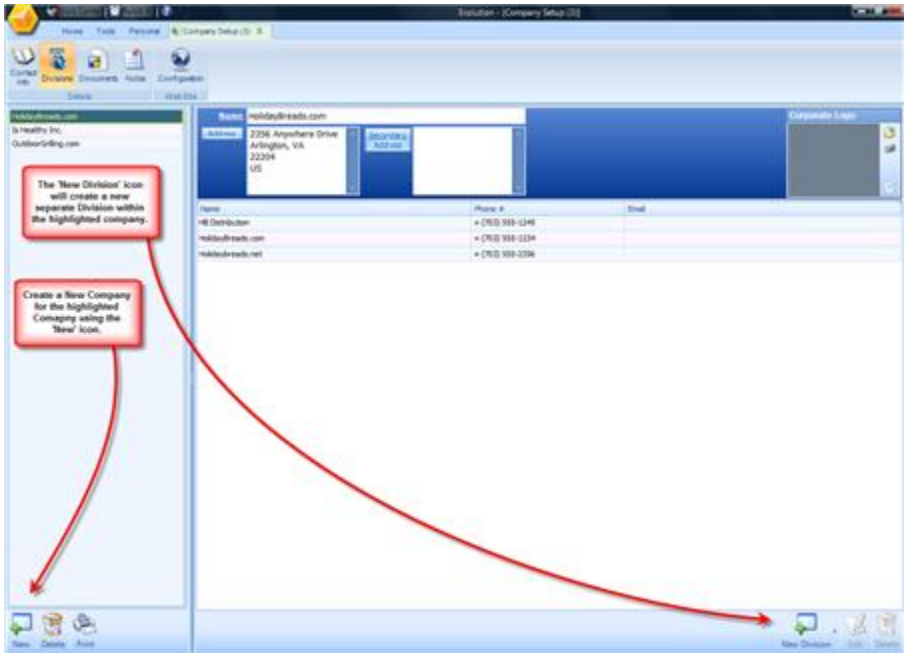
Multiple companies with multiple divisions structure provides the ability to have completely separate companies with each of those companies having more than one Division.

This is ideal for numerous scenarios. Larger enterprises with wholly owned subsidiaries, divisions or multiple Ecommerce websites owned by a Company and structured as separate divisions within a company are a few common applications of this structure.

From the company screen in Tradepoint the view of multiple companies with more than one Division will appear similar to the image you see below.

Creating multiple companies is done with the 'New' icon in the lower left of the screen.

Highlighting one company and clicking on the 'New Division' icon will create more than one division structure within the highlighted Company.



This screen shows multiple companies listed on the left with the multiple Divisions of the highlighted Company on the right. Clicking on any of the other listed companies on the left will show one or more Divisions for that company.

Company & Division Details

Contact Information

Within each Company and Division in Tradepoint the contact information acts as the anchor for all of your company and division details within Tradepoint.

This means when an Order is placed within Tradepoint or through your website Tradepoint will know what Company to associate the activity with and what the relevant preferences are for that action. Preferences will include any sales taxes, shipping information and currency transactions, for companies using our multi-currency Ecommerce solution or web services.

It's a small detail but one that will make a big difference when all of your subsequent information and transactions are handled for you in the background as your business operates.

Each window will have address wizards. When your contact information is entered in here you can move on. Tradepoint will do the rest.

Clicking on either Address icon will open the wizard.

Save your changes and Tradepoint will know to associate all related information and actions with a given Division/Company.

Chart of Accounts (COA)

The Chart of Accounts is the basis for your Accounting structure within Tradepoint. There are three ways to set up your chart of accounts:

Use one of our templates to create a Chart of Accounts
Manually create a Chart of Accounts
Import an existing Chart of Accounts from another application. Some software applications do not permit you from exporting your COA. Please check your software to make sure you can export it. If you are not able to export your existing structure then use option 1 or 2 for creating your COA.

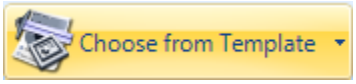
Using a Template

Using a chart of accounts template is the quickest way to set up your chart of accounts (COA).

Consistency is your COA is important when changing software applications. Please check with your Accountant prior to using this tool since the template is likely to not match your existing COA structure.

Using the chart of accounts template tool within Tradepoint will set up your COA in just a few clicks.

From the Chart of Accounts screen within Company Settings the 'Choose from template' icon in the lower left corner.

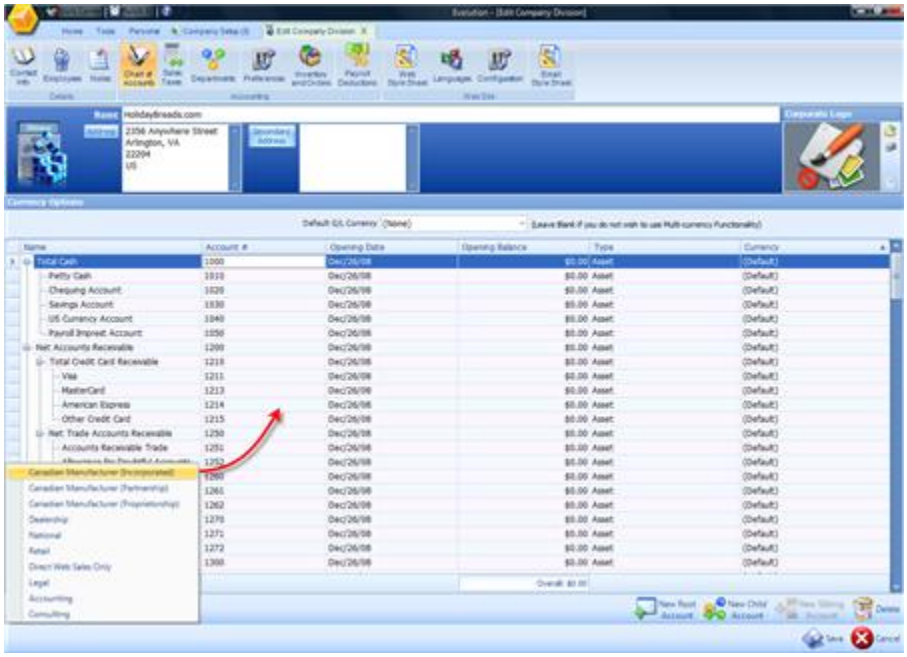


A pop-up menu is built in so you will see a number of choices to choose from.

Due to the fact that each COA is distinctly different from the other even within the same industry at this time there are only templates for the top 3 options listed in this menu. More chart of account template options will be populated in the near future.

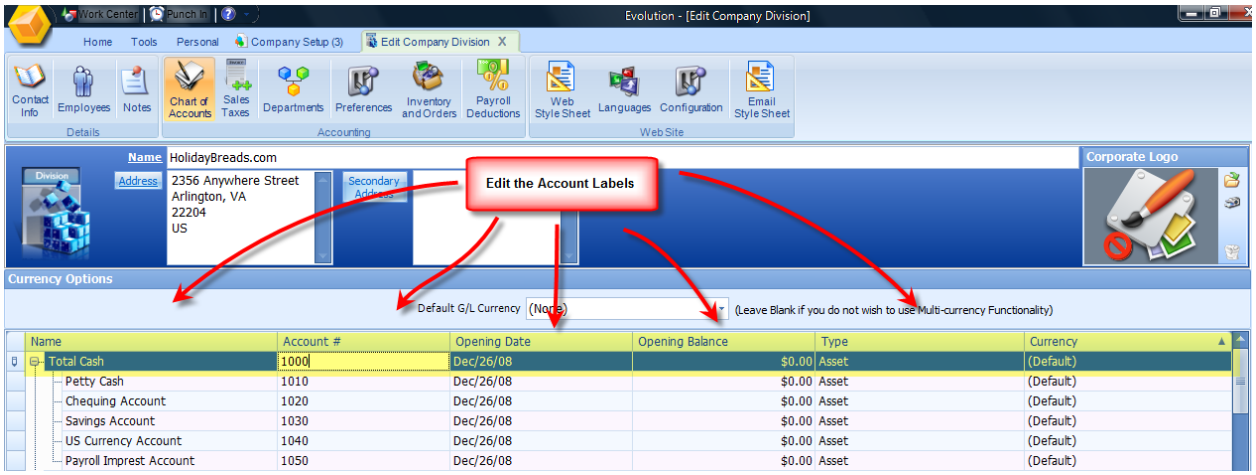
Templates can be adjusted easily to include additional accounts, delete accounts or change the names and types of accounts within each template.

Once you have chosen (clicked on) which template you will use it will populate the COA immediately. Unless you are making any adjustments to the COA template you just set up your Chart of Accounts using the built in templates.



Note: The top 3 templates are similar to one for North American based companies another yet hold differences related to the ownership (Incorporated, Partnership, and Proprietorship) and can be adjusted to reflect your needs.

Editing a chart of accounts (COA) can be done using the icons to create new accounts in the lower right or by editing directly in the information within one of the Account fields.

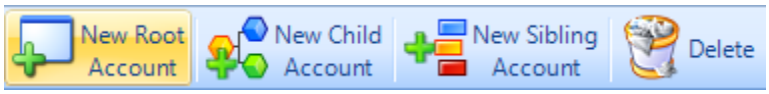


Some Accounting applications DO NOT require Account numbers. Tradepoint does and this serves three main purposes.

> Retaining the COA structure as your company grows.
> Accounts that are added will be automatically arranged by their Account number and Type into the correct order.
> Account Numbers serve as a tool for referencing default actions based on your preferences, and can automate your Accounting process easily.

Manually Create a Chart of Accounts

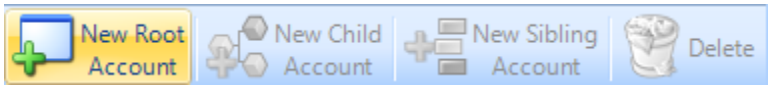
If you are manually creating a chart of accounts, then you can create new accounts with these icons.



You will see that the icons lit up are the types of accounts you are able to create manually. For example if you have highlighted an existing root account you will only see the 'New Child Account' icon lit. If you have highlighted a child account then you will also see the option for creating a sibling account lit up as well.

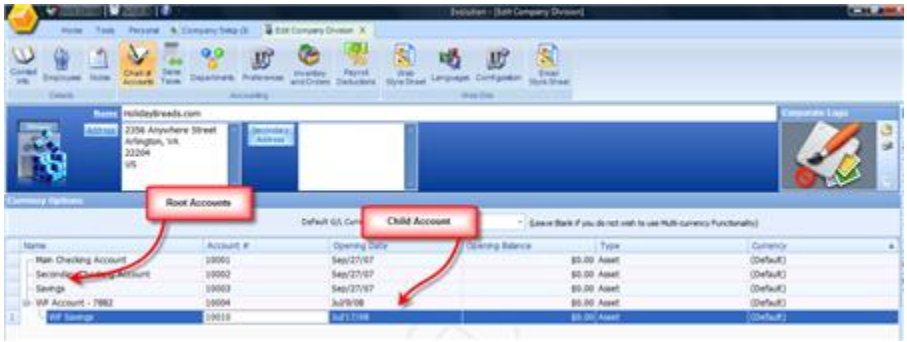
The same holds true if you are creating a COA from scratch. Each type of account you are creating will only light up the next relevant icon.

When you start with the blank COA screen the only icon lit up should be the 'New Root Account' icon.



As you create your COA more icons will light up on the lower right to create multiple levels within your Chart of Accounts. Each of the fields within the Accounts is editable by clicking on them directly and the Tab key can be used for easier navigation.

The account type can be set with the drop down menu in the Types field. The Type set in the chart of accounts will determine what accounts can be picked for defaults and throughout Tradepoint within individual transactions.



Deleting Accounts can only be done through the Chart of Accounts section of Company Settings. Accounts can only be deleted one at a time and there is a double prompt before the account is deleted.

This structure supports an unlimited number of Account levels within a COA.

Importing an Existing Chart of Accounts

Importing an existing chart of accounts from other software applications and also includes additional information including contacts (Customers, Vendors, and Leads). Applications that can be directly imported into Tradepoint using our data importing tool include:

> **QuickBooks** – IIF Files: This option will import an IIF file exported from QuickBooks. IIF files will often give you an option for exporting only the Chart of Accounts or can include the Chart of Accounts with other types of contacts and some types of account history. *Please note that sales history and other accounting types of activity for contact might not be retrievable. This is based on what version of QuickBooks you are running and the condition of data in the database.*
>
> **Goldmine** – This import will bring in all of your Goldmine data including contacts, calls, notes history and linked files. This does require the location of the database and preferences for establishing Categories within Appointments, Customer Calls and linked Documents. *These Categories can be set up within Tradepoint prior to an import from Goldmine.*
>
> **Peachtree 2005 or later** – This import process includes instructions on how to export your data from Peachtree and will require the location of the Peachtree CSV file and setting a default Category and Status. The Peachtree import will bring in summary data including Account balances, Customers, Vendors (Suppliers), G/L structure and information.
>
> **SQL** – SQL Driven applications can often allow accounting data to be exported if it is accessible directly from the SQL database structure. Please contact us if you have any questions about an application that is not listed in our Import tool.

For further information about any other applications not listed please contact our technical support department at support@darwinproductions.net

SALES TAXES

Tradepoint provides the ability to apply sales taxes to a national, state/provincial level or a locality or locality based on a postal/zip codes giving you the ability to apply sales taxes to exactly the regions relevant to your company. This extends to companies operating in more than one country with different tax requirements.

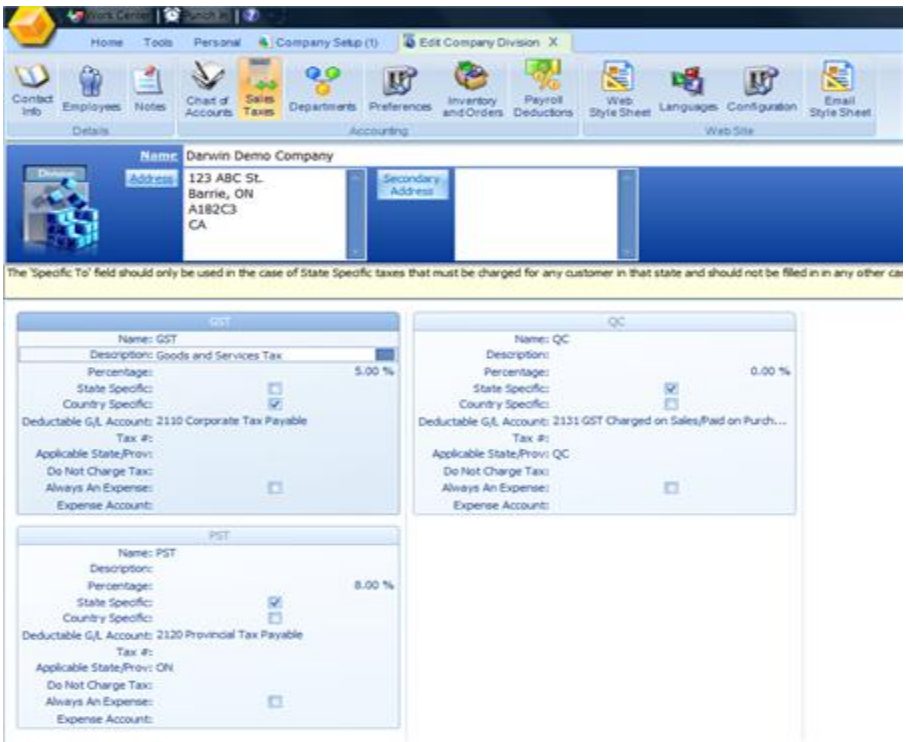
Three items have to be in place for sales taxes to automatically pick up as sales activity is processed.

Sales taxes within Company Settings
Sales Taxes attached to your Products
The Address and Zip Code of your Company has to be formatted using the Address wizard.

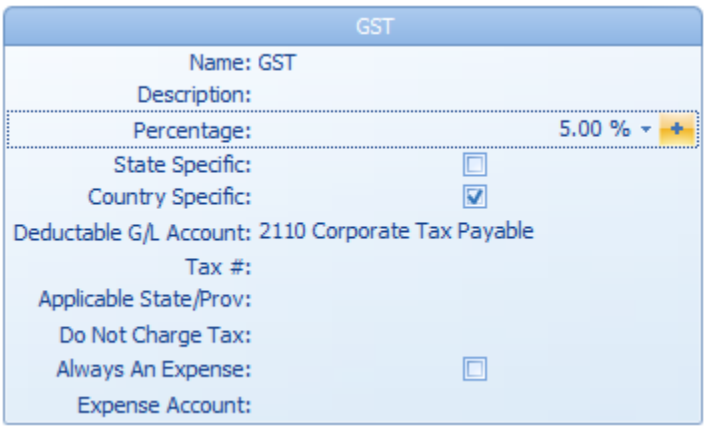
Companies based out of Canada will be able to create the GST, PST and respective HST or QC taxes depending on the location of the companies and the customers they serve.

For US based sales taxes multiple sales taxes are supported including states like California and Florida where locality taxes are required in some cases, and varying tax rates based on County or Zip Code are prevalent. We will be reviewing examples of functions that support these cases in this section of the Setup Guide.

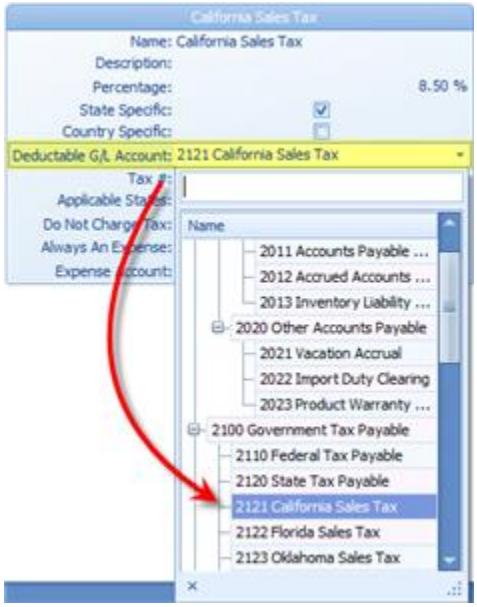
Since most companies will have at least one if not several sales taxes, Tradepoint supports an unlimited number of sales taxes and each of them will be displayed as a digital note card for easy viewing at a glance.



Creating your sales tax rules is done with the 'New Sales tax' icon in the lower right. Clicking on this will open one or more cards you see above. Each of the fields within one card can have information typed in manually or enter in a series of Zip/Postal Codes for a specific tax.



Clicking on any of the field will allow you to enter in the relevant information and access your Chart of Account information to enter in a default Account for a Deductable G/L Account or an Expense Account if relevant.



Each Sales Tax can have its own account.

It is ideal to have an account in your G/L for each state you have to account sales taxes for though not necessary.

For example for different state sales taxes an account in the G/L can be set up for each state that you have to report sales taxes for. Then at the end of the accounting period an activity report can be submitted along with any remaining payments for that state.

In this image you can see by clicking on the sales tax account field you can access your G/L and specify an account by clicking it once.

For States where varying tax amounts are either by zip code or county, Tradepoint will support varying tax codes within one state by zip/postal code. For states with varying tax code by county the tax codes will have to be entered by zip code. States that have varying tax rates by county will often post this information on their websites. California is a good example with all of their tax information posted on the website by county.

http://www.boe.ca.gov/cgi-bin/rates.cgi

From here some counties will have to be broken down by zip code, and some counties will be comprised of two tax rates depending on the zip code. Some websites provide a county break down by zip code if you don't have all your tax information in one Excel file for example.

Be sure to check with your Accountant about your sales tax information to ensure you are accounting for everything you are required to. Below are a few links for search tools by city or locality in relation to zip codes.

http://zip4.usps.com/zip4/citytown

http://www.50states.com/

Setting up Zip Code Based Sales Tax Rules

Since only some states have sales taxes that extend all the way to the local level, we are going to use a California city (San Diego) to illustrate how to create your state sales tax information for varying rates by county within Tradepoint manually.

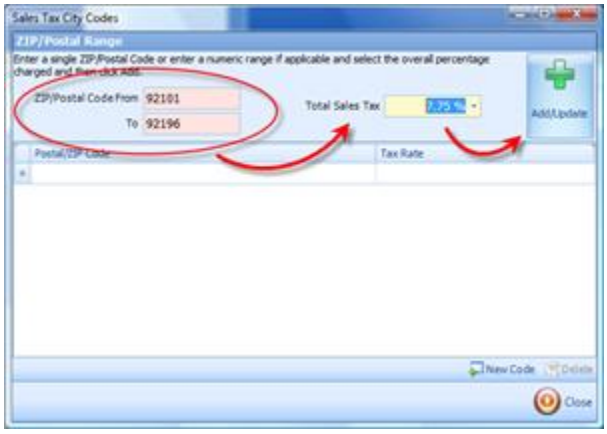
In this case we will illustrate how to setup zip code based sales tax rules including a zip code range for sales tax rules in San Diego to show how a range of zip codes can be entered and then adjusted if necessary.

From a sales tax card in Company Settings the Percentage field will show the place to enter in the amount and if highlighted a plus sign at the far right (highlighted in the example below).

A default amount can be entered in to this field which will apply to every California zip code, unless additional zip codes with different tax rates are set using the plus icon on the far right.

When additional zip codes are set any different amounts will over ride the main amount you see here when sales happen in those zip codes.

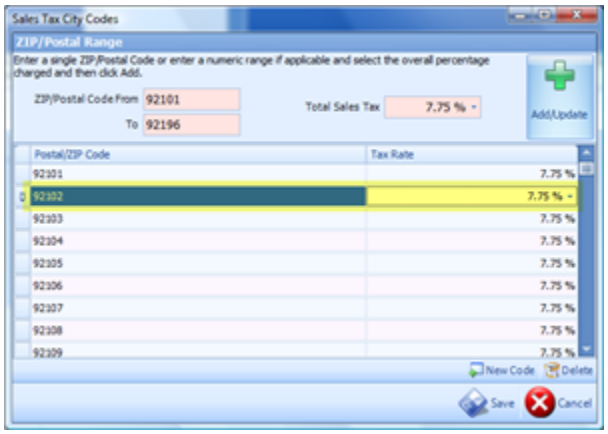
Clicking on the plus icon will open the zip code wizard to upload a range of zip codes with a give rate. You can enter in several ranges before saving changes to your sales taxes.



Enter in the Zip/Postal code range in the circled fields.
Then enter in the rate in the next field.
Click the Add/Update icon to apply this to the range of zip codes.

Note: This tool supports use of the 4 digit extensions in Zip/ Postal codes for US based Zip codes.

When you have finished with that range they will pre-populate in your screen as you see below.



Multiple ranges can be entered in here before saving.
Single Zip/Postal Codes can be entered in here.
Individual Zip/Postal codes can be edited after the fact by clicking on the field and changing the amount.
A scroll bar on the right allows you to scroll to a specific zip code to update or change it.
Save your changes to update your Zip/Postal Codes.

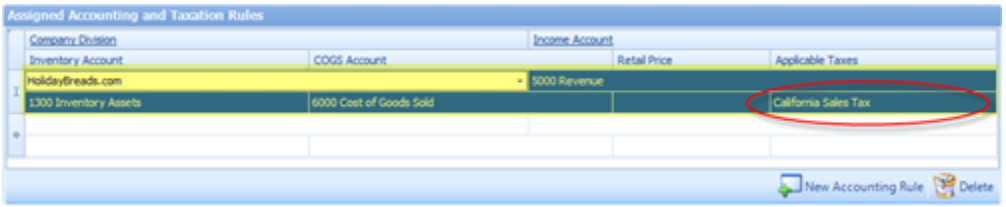
Each sales tax card in your company settings can have additional detail as shown in the example above or the main tax rate entered in on the 'Percentage' field will act as a default for that tax rule.

Tax rules can apply to a national, state/provincial or local level based on the settings you apply to them.

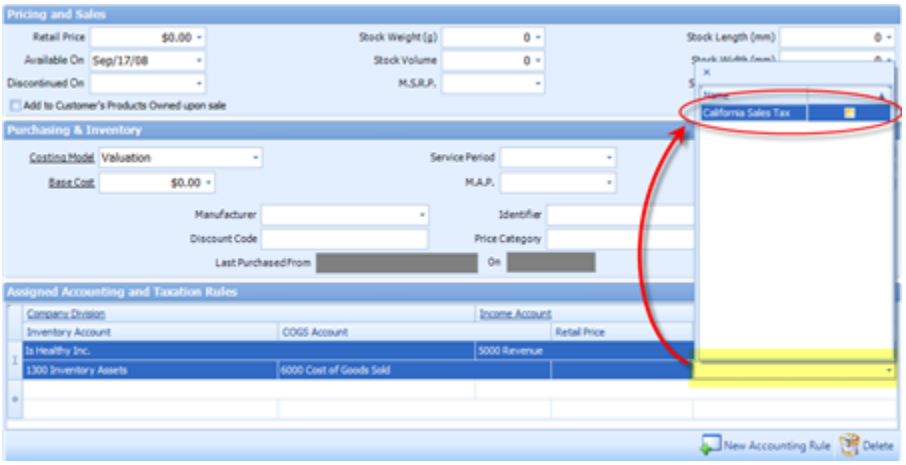
Applying Tax Rules to Products

Applying your tax rules to your Products (and services) is done through the Product section. Tax rules can be applied to all or specific Products or services you have as a part of your company.

Within Products you have a section for setup in Tradepoint. This section is where you setup most of the basic information for your Product listings. The 'Assigned Accounting and Taxation Rules' is where the sales taxes can be applied to each of your Products and Services.



If you have multiple sales tax rules you will be able to access them through each product in a drop down list built into the 'Assigned Accounting and Taxation Rules'. Check the box in the pop-up window to specify which taxes apply to your products and services.



Note: Assigned Accounting and taxation rules can be applied to products en mass through Company Settings and within the SQL database directly and can also be imported through most of the data import tools mentioned above.

Company Contact Information

Your company contact information is the basis of how Tradepoint established relationships and automates actions as they happen in Tradepoint. This is why something as simple as using the address wizard within Company Settings for your information is important.

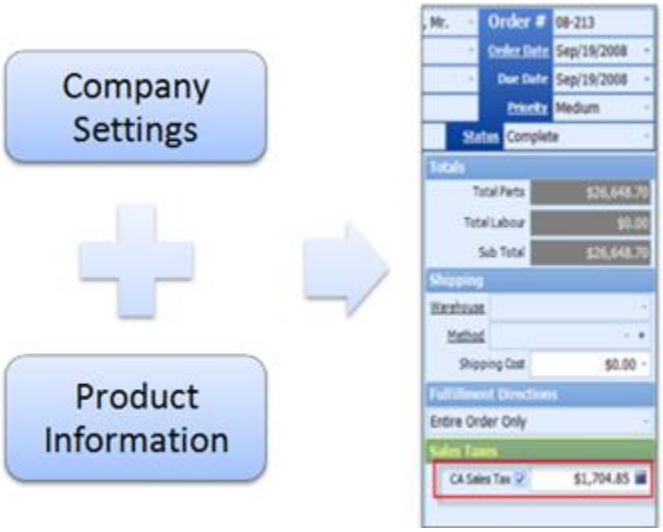
As for Sales Taxes this means that the main company contact information in your Company Settings is how Tradepoint knows to charge which Sales Taxes, for what Products in which locations.

For example a Canadian Company selling products in the US through a website will only be charging Canadian Sales taxes to customers whose contact information is within Canada. Likewise, US based companies selling Products to Canada will only be charging US sales taxes based on the location of the customers based on their contact information.

Exceptions to this particular example will exist if the each of the companies has divisions within the other country. So, if a US based company had a division within Canada they would have to charge and account for all Canadian Sales Taxes and vice-versa.

How Sales Taxes Work

After the Setup is complete the sales taxes will appear based on these settings within both Orders and Invoices. Any exceptions for either Products or within your tax rules will be taken into account as Orders/Invoices are processed.



This also applies to any web based sales for customers using our packaged Ecommerce solutions or web services. Your customers on the web will see the relevant sales taxes based on their zip/postal codes as they go through the shopping cart on your website.

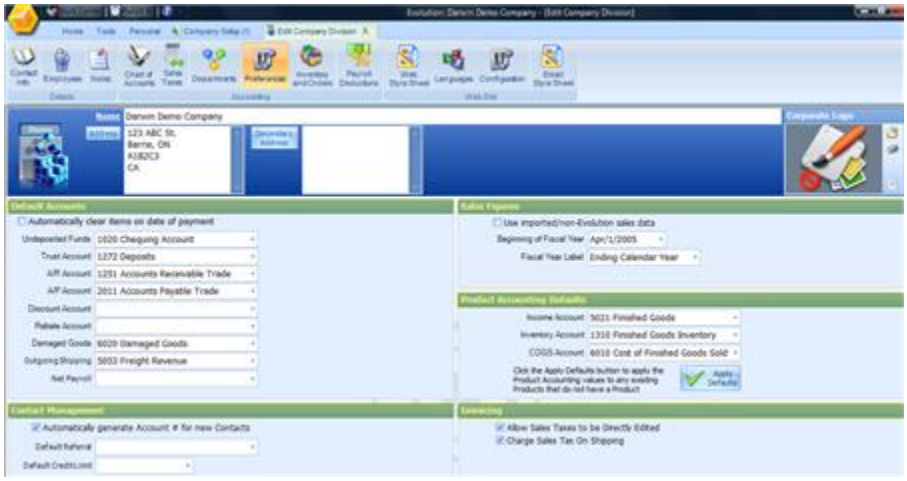
Note: If you checked off the option to have sales taxes be editable within your preferences you will be able to edit them on each Order and Invoice internally within Tradepoint. Sales that come through the web which need the sales taxes to be edited for any reason ill have to be done after the order has been processed through your website.

Departments

In Company Settings Departments is a tool for setting a specific G/L account for a given department within your company for budgeting purposes. Type in the names of the respective Departments in your Company and assign them an Account that you have setup within your COA and that department can allocate activity to that G/L account.

DEFAULT ACCOUNTING PREFERENCES

Default accounting preferences within your Company Settings will enable you to set defaults for a number of actions within Tradepoint. This automates many basic actions as you conduct business.



Default Account Preferences: These Accounting preferences will assign the default sales and transaction activity to the respective accounts you assign. The only required default accounting preferences are undeposited funds, A/R and an A/P account.

Note: If you need to create one of these accounts while setting up the preferences you will be able to do so by toggling back and forth between the COA section and the Preferences section. As soon as an account is created within the COA it will be accessible in Preferences. You will NOT need to save your changes to Company Settings to access a newly created account.

Contact Management: This option will allow Tradepoint to generate new account numbers for you automatically. The number is a computer generated alphanumeric account number. This option can be unchecked if you have your own numbering system for when new accounts are created.

Default Referral will allow you to set a default account to a contact for all referral activity generated in Tradepoint.

Default credit limits will set a default credit limit for all customers, resellers and suppliers as those accounts are created. If your company does not use credit limits then leave this field blank

Sales Figures: If you are using imported sales data then check off the box for sales figures. This will set different parameters for the closing accounting periods for your sales figures.

Beginning of Fiscal Year establishes within Tradepoint the beginning of the fiscal year for your company within Tradepoint.

Fiscal Year label is the ending day of the fiscal year label for your company. This sets the yearly closing period for your accounting activity.

Products Accounting Defaults: These are accounting rules for your Products. Setting product accounting defaults will often be a considerable time saver instead of applying each accounting rule one by one to your Products. Clicking the 'Apply Defaults' icon will automatically apply your product accounting defaults to all Products within Tradepoint. This process can be repeated if/when new Products are imported into Tradepoint at a later date.

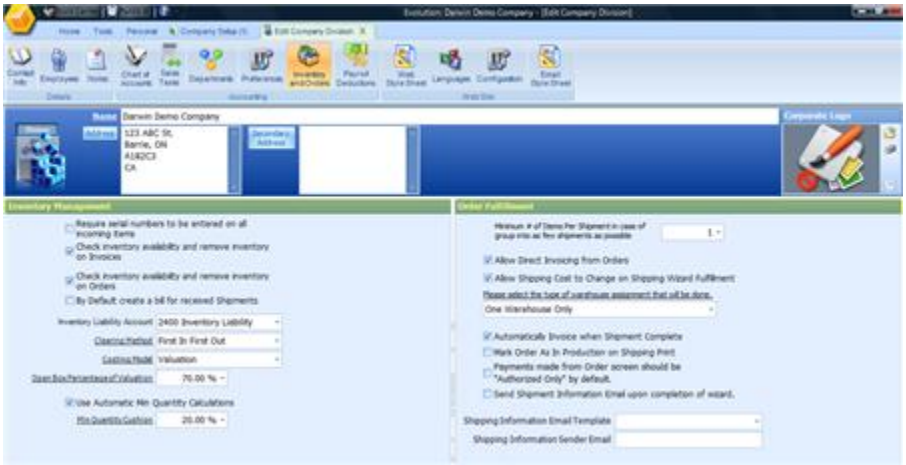
Invoicing: Check off the option to allow your Sales Taxes to be editable. This will allow sales taxes to be editable within all open Invoices.

For charging sales taxes on shipping this option will automatically calculate taxes on shipping amounts for Sales orders that are shipped out.

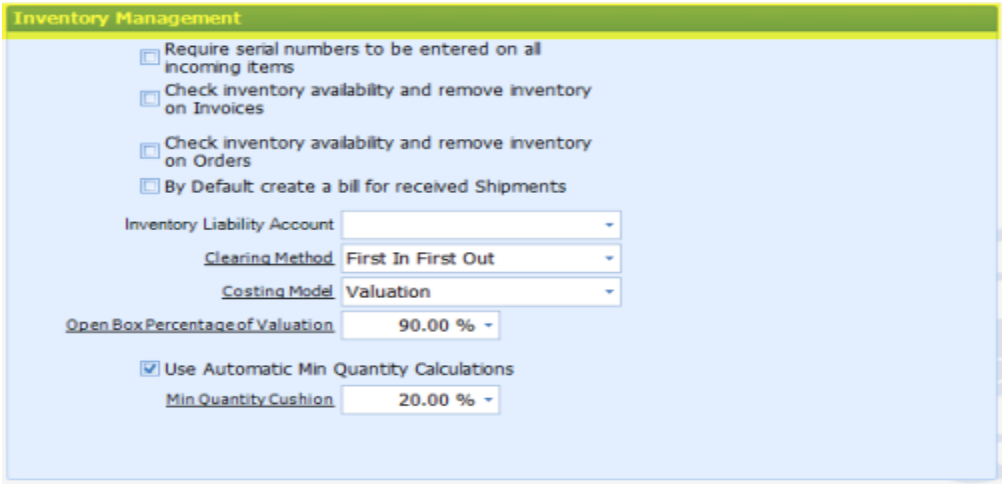
Note: All preferences will extend to your Ecommerce processes automatically when using one of our Ecommerce solutions or web services to manage your Ecommerce activity.

INVENTORY AND ORDERS

Preferences for managing Inventory and Order Fulfillment are addressed with these Preferences. Inventory management preferences will apply to internal activity as well as web based activity from one or more websites.



Details on the inventory management preferences are explained in detail in the image shown below.



Inventory Management: If your inventory requires serial numbers this first option will require all Inventory being brought into Tradepoint to enter in the serial numbers then. ***If your Inventory has some serialized items but not all of them then a setting for your Product to be a serialized item will also prompt you to enter in serial numbers on only those items that are serialized and not ALL Products.***

Note: These preferences will carry through to using barcode systems as well so any serialized items will be able to be scanned into Inventory as well as on Order Fulfillment.

The two next preferences determine at what point in your sales process your Inventory numbers are updated for checking Inventory availability and removing Inventory as sales are processed.

For Inventory to be updated at the point of Orders check off the first option and for updating Inventory levels at the point of Invoices then check off the second option to check availability an update Inventory when an Invoice is generated.

Most companies will need to have the first option to have Inventory updated and to check availability levels when an order is generated. This will also allow Inventory availability to be viewable on all Orders generated internally within Tradepoint.

Create a Bill for Incoming Shipments: On any incoming shipments the create a bill for incoming shipments option will automatically generate a Bill for any items that are received into Inventory. *The receiving wizard has an option for this at the end of the Receiving wizard.*

Inventory Liability Account: The inventory liability account is a required account for anyone which has physically inventoried items. First a few things about receiving inventory.

There are two ways of receiving inventory:

> Some software applications (including QuickBooks and Simply Accounting) receive inventory and put it in a "hold". It can't be sold until you have the invoice from the supplier. That's because the reciprocal in their case is the bill to the inventory asset account for that item (i.e. the expense = the asset in inventory). This is the super simple way to do inventory but it also means that you can't sell product until the bill is received.
> The second methodology, which Tradepoint uses, follows advanced accounting system (like AccPac) methodologies. The asset value of the items is estimated by the product valuations (or other costing models, averages and per Purchase Order, on the main page of the product screen)

plus any duties and fees that you estimate on the purchase order. These valuations are used to store the inventory and allow you to sell that inventory immediately. To do this, the reciprocal account of the inventory asset account, instead of being the bill's expense account is the *Inventory Liability Account*.

Note: With the QuickBooks model it works the exact opposite of an A/R Invoice. This means that two G/L entries are done for each line item: One G/L entry is the expense that is the reciprocal of the A/P account and the other G/L entry is the reciprocal of the Inventory Asset.

With Tradepoint, that is NOT necessary on the Bill. Instead Tradepoint supports the A/P reciprocal expense (i.e. the total of the line items + shipping + taxes = the A/P General Ledger entry created when the Bill is completed).

Clearing Method: First In First Out or Last in First Out are your Options for an inventory clearing method. The vast majority of companies will use the 'First in First Out' option.

Costing Model: Tradepoint supports three costing models Valuations, Averages, or Per Purchase Order. Most companies will use Valuations. Industries that see a great deal of price fluctuations from Suppliers will use either Averages or Per Purchase Orders.

Open Box Percentage of Valuation: When your company processes a return, refund or exchange, items have three basic states: Like New, Open Box, and Damaged. The open box percentage of valuation automatically assigns a value based on the accounting defaults setup within company settings.

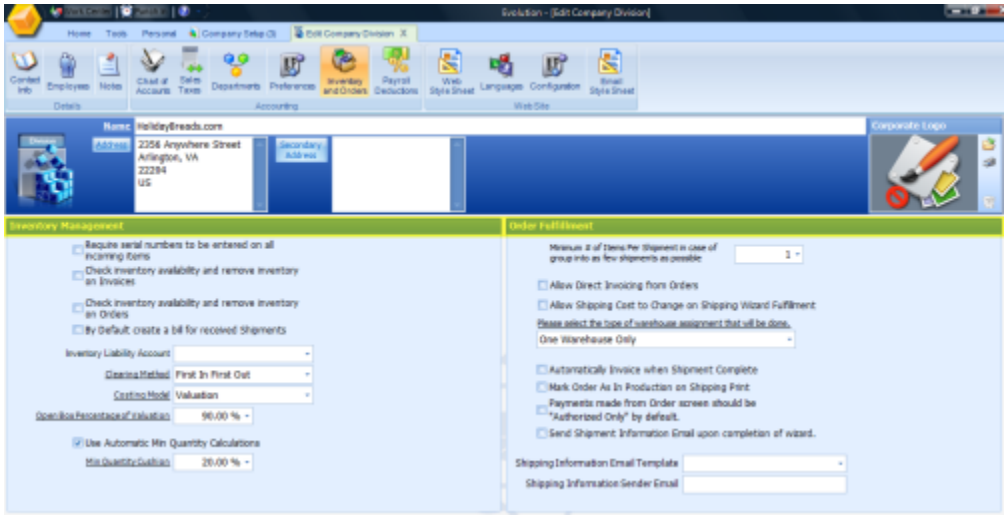
Like new goes back into inventory at 100% value.
Open Box goes in at whatever percentage you put in the "open box percentage of valuation".
Damaged is written off at 100% of the original value and put in the damaged goods COGS account.

Use Automatic Min Quantity Calculations: Automatic min quantity calculations is an adjustable percentage used for fuzzy logic to generate suggestions of products to be reordered. Essentially, the percentage generates a gap required to keep enough Inventory on hand over time.

For example, if you sell 50 items a day, and it takes you 3 days to order, you'll want a cushion of 150 items. The Min Quantity will be the minimum number you need to keep in stock for the duration it takes to get the items into inventory so that you can sell them.

ORDER FULFILLMENT

Order fulfillment options will automate key points during your ordering process. These options will automatically extend to your Ecommerce solution or web services.



The first option is defaulted at 1 item as the minimum possible for orders. This number can be adjusted and will make it so that any higher numbers will be required on any orders that are partially fulfilled. This option is used often if your company partially fulfills orders in the case of back ordered items, for example.

If your want Invoices to be created automatically every time an Order is created and completed then this option will generate an invoice each time an Order is completed.

To edit shipping costs within the Shipping wizard check off this next option. This will allow shipping to be edited within the Shipping wizard and allow for last minute discounts or increased in shipping costs on a per order basis.

Warehouse Assignments: The warehouse assignments option will set the default for the number and availability of your warehouses.

One Warehouse: If you have one warehouse then this option is for your company.

Multiple Warehouses: If you have multiple warehouses and you only fulfill Orders from one of them then this option will let Tradepoint know that you have multiple Warehouses but your default Warehouse will be the warehouse where Orders are fulfilled from

Multiple Warehouses with Group Availability: For companies that have multiple warehouses with group availability and fulfill orders from each of those locations then this option will allow fulfillment to happen from more than one location on a per Order basis.

Automatically Invoice when Shipment Complete: This option is what it says and will automatically generate an Invoice each time an order has been shipped out.

Mark Order as in production in Shipping Print: This option will show any outgoing Orders as being 'In Production' when the email message confirming an Order is auto-generated and sent to the customer.

Payments made from Order Screen should be 'Authorize Only' by default: This option will allow orders which are generated internally to be authorized only but will have to be put into another Order Status manually.

This means that when you process the order, then the payment from the Order screen it will go to authorize.net (or your web payment services) and ***only*** does a credit hold on the person's account, not a

full clear. The next step happens when the invoice is made after the shipment and the payment is recorded, the system will take the hold off and take the full payment.

This preferences works well when you have the option to 'directly Invoice from orders' checked off as active.

Send Shipment Information Email Upon completion of the Wizard: Each order that is completed will automatically send an email with the shipment information to the customer. This is ideal for most fulfillment processes. *This option also does require an Email template to be established and specified before it becomes active.*

Payroll Deductions

Payroll options within Tradepoint supports up an unlimited number of deductions even though most companies will only make use of up to 6-8 at the most at any one given time. There are two pieces of information that have to be set up for Payroll to be successfully processed using Tradepoint.

Payroll Deductions within Company Settings
Employee compensation and schedule settings within each Employee profile

This section will go over the details for the company settings portion of payroll and establishing deductions and their details.

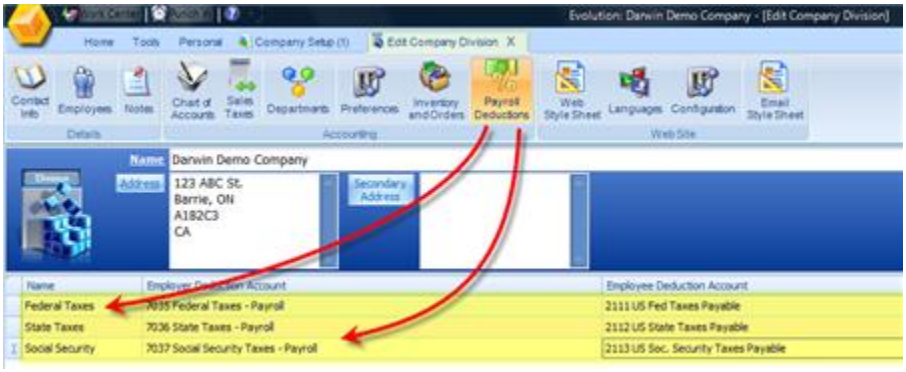
Note: If your company uses an external payroll company, Tradepoint also generated reports based on hours, salary or salary with commission which can be emailed in several different file formats.

Setting Up Deductions

Note: Please consult your Accountant before you set up your deductions for the first time to make sure you have the latest information for with holdings in Payroll.

Tradepoints payroll structure supports an unlimited amount of payroll deductions. This allows you to have not only the standard deductions for governmental deductions but additional ones for items like savings or health plans offered with some companies.

Basic Payroll deductions are created within the main Payroll Deductions settings in the screen below. The second step is to edit the Fee Schedules of each of the deductions to create the details for the relevant income ranges and States/Provinces as well.



In this example there are three main deductions listed. Each of those deductions can have multiple Fee Schedules.

Each of the fields above can be typed into and for each of the Accounts you will have a drop down menu to access the respective Account from the COA.

The next step will be establishing the payroll fee schedules for each of these deductions.

Payroll Fee Schedules

To create and/or access those fee schedules highlight one of the deductions and click the "Edit Fee Schedules' icon in the lower right of the screen.

Note: Each Payroll deduction can have multiple fee schedules attached and if you have Employees working in multiple states this may be the case.

The next screen will have the fields for applicable parameters and for income ranges that percentages can be applied to. Each of the main fields in the top of the page is optional since multiple combinations of information may be the case.

If the deduction is applicable on a national level then keep the State field blank.

If an income 'floor' or 'ceiling' is not applicable in the case of your Fee Schedule then leave those blank and enter in the income ranges.

Each listed income range is a Fee Schedule and multiple Fee Schedules can be created with the 'New Fee Schedule' icon in the lower right.

The fields for Employer and Employee deductions can be set up for percentages or fixed amounts for each Fee Schedule with each income range.

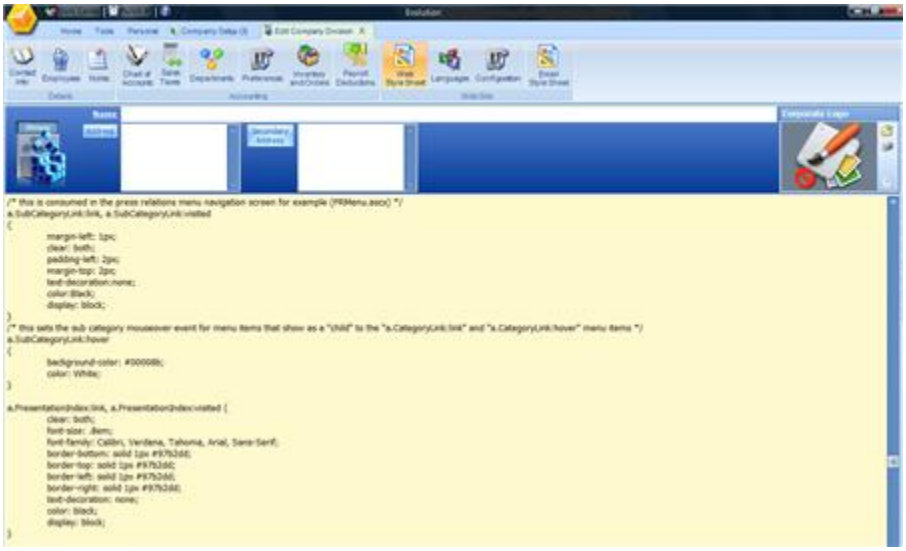
When all of your deductions have been set up save your changes. When Employee profiles with schedules are setup the second part of Payroll preferences will be explained as being specific to each Employee.

Website Configuration

For customers using our Ecommerce solutions the website configuration section of company settings are often pre-populated during the installation process of your website. This setup guide will offer an explanation of the functions of each one and how to use then to make fundamental changes to your website, language localization, and configuration settings for automatic web based actions and email style sheets.

Web Style Sheets

The web style sheets are what hold the CSS (Cascading Style Sheets) HTML code for your website.



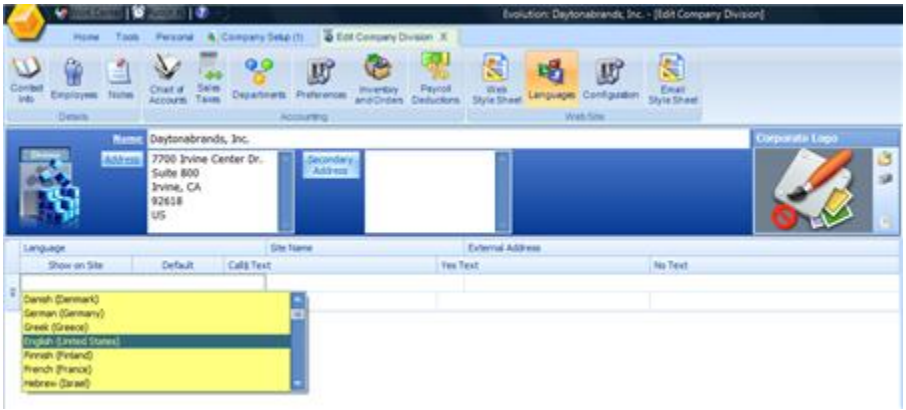
The CSS can be uploaded and edited from an editing program or the Photoshop file can be uploaded directly into the folder structure within your web hosting arena for your website.

Language Localization – Step One

Company Settings includes preference setup for language localization for your website into multiple languages.

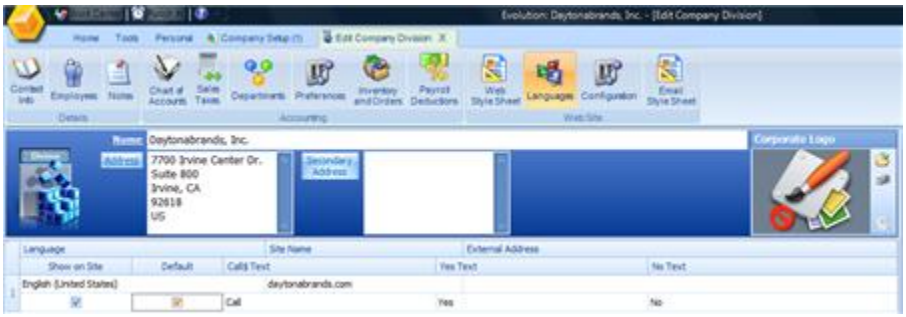
Note: The original website established within Company Settings will be the default website with localization preferences based on the type of shopping cart you are using (one language and currency or multiple languages and currencies). For companies using the multi-lingual ecommerce solution the language localization option will work out of the box and post to each respective website established after the initial default website has been setup.

Setting up your company settings is the first step in a two steps process of localizing a website into another language.



The fields above have tools embedded within each one for the respective settings. The language icon is highlighted in the example above with the drop down menu displaying available language settings.

Multiple languages can be pre-set here with your website information. Only the default example is shown in the image below.



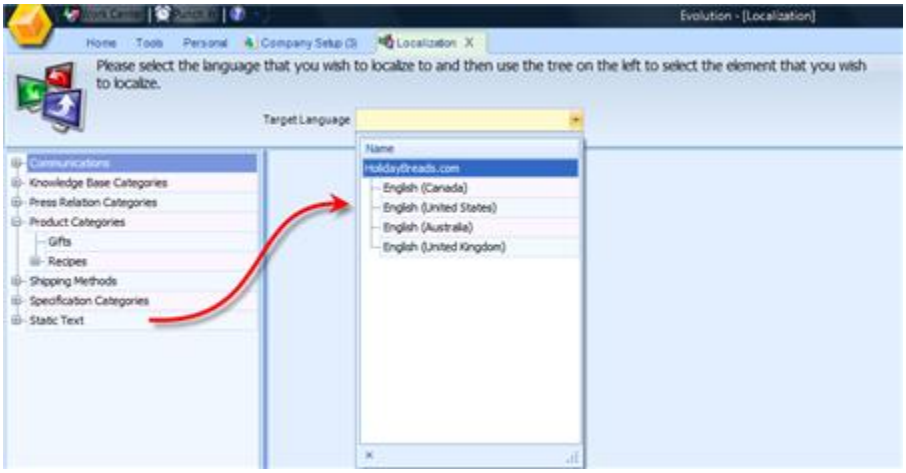
Language Localization – Step Two

Completing localization for multiple languages can happen after the Company Settings have been setup for more than one language.

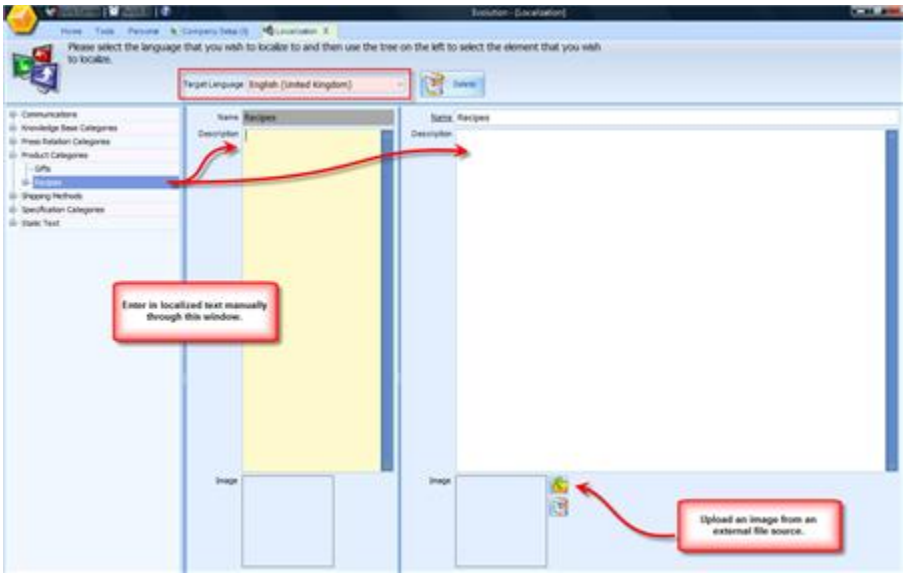
One or more languages can be setup through the Company Settings and then the actual content will need to be uploaded or created manually through the Localization settings found in the Tools tab.

From Company Settings click on the Tools tab. The localization icon will be visible.

The main screen will show your pages listed on the left with expandable menus for subpages in the 'plus signs'. 'Target Language' pulls the information from localization settings which have been setup in Company Settings for language localization.



Clicking on any of the listed pages with any of the drop menu options of listed available languages will open that particular page to be localized for that language or in this case variations of English.



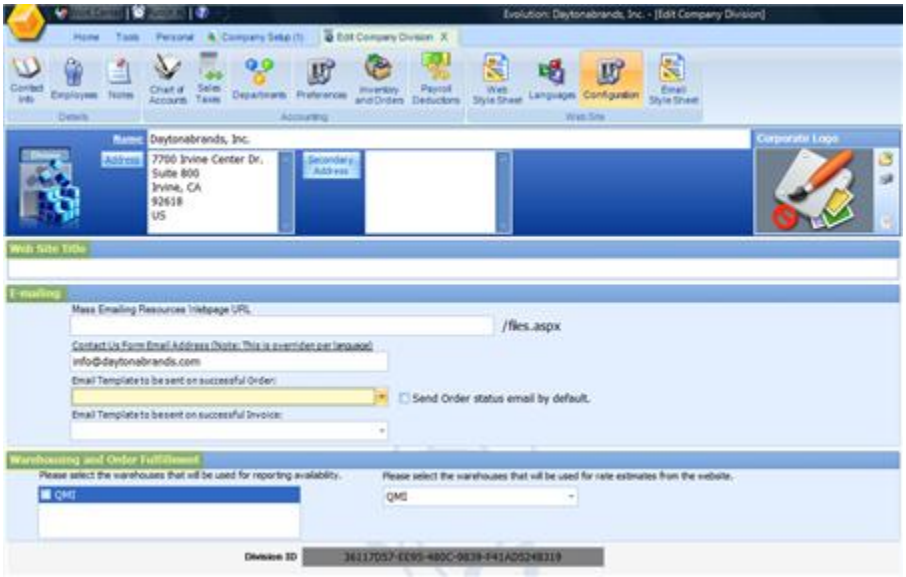
Content can be entered in manually on the right hand side, or copied from another source. An image can be uploaded into the content from the icons highlighted or added to the Static Text pages under the Tools tab.

Note: Most browsers will automatically pick up the language of the IP address of the user on the computer showing in their native language. However, using a translator and directly localizing pages for specific markets will yield more accurate results in the subtleties of language dialect and give you more control over the information you present within a given market,

Configuration Settings

Website configuration settings provides default settings that can be adjusted as necessary automatic emailing communication options and warehouse fulfillment options for companies using direct fulfillment of Orders.

Note: This function will allow for multiple websites who are part of their own Division to have email communications branded specifically for each respective website. This will also apply if you are using multiple warehouses for direct fulfillment.



Website Title – Title of website for this Division/Company

E-mailing – Options for automatic emailing templates to be used based at key points of action on a website:

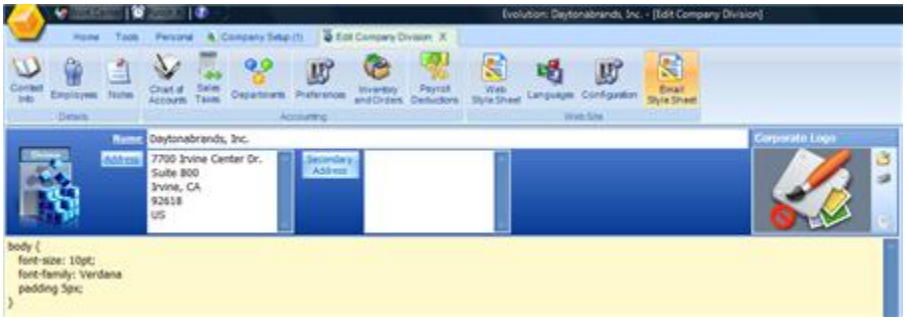
Web page URL for Mass Emailing Resources
A Contact Us Email
Email to be sent at the completion of a Successful Order
Email to be sent at the completion of a successful Invoice

Each of these templates pull information from Email Templates setup in your Templates section accessed from the Tools tab. (Creating Emailing templates will be discussed in-depth later within this Setup Guide).

Tradepoint supports an unlimited number of email templates.

Email Style Sheets

A email style sheet holds basic default information for the email going through a given Division/Company. This will create a uniform look and feel through your company. The use of Email templates, editing tools, Vcards, and customizable signatures allow options for personalizing email appearances.



SECURITY PROFILES & SETTINGS

Tradepoint has multiple options for managing security settings and access to information, and functions throughout the software.

Individual security profiles are created through Security Settings accessed through the Tools tab. These functions include the ability to parse out and filter access to information as well as functions (such as View Only, Print and Export to File for Reporting)

Additional permissions to information and functions can also be controlled through numerous options within Employee Settings for an Employee's profile for further shaping of a specific role or the ability to shape a unique profile.

With both of these tools provide the ability to have defined user profiles with as much or as little detail as necessary.

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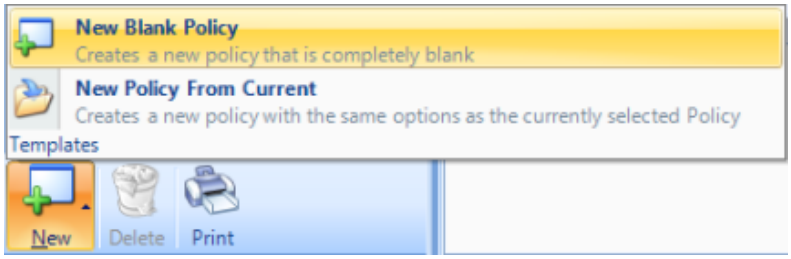
With both of these tools provide the ability to have defined user profiles with as much or as little detail as necessary.

Creating Security Profiles

The default security profile in Tradepoint will be Administrator. In this case you will see the check box checked off for 'all other options will be ignored'.

Creating a new security profile in Tradepoint is done by clicking on the 'New' icon in the lower left. Options are accessed for creating a New Blank Policy (which is done the first time a new security policy is created) in the pop-up options.



A New Blank Policy will have to be set up the first time a security policy is created. Each of the icons in the top of the security screen represents different sections of Tradepoint that can be customized for different roles.

Enabling security access for a profile in Tradepoint involves enabling the icons on each of the tool bars and then enabling various functions within each Section (Leads, Customers, Suppliers, Projects, etc.).

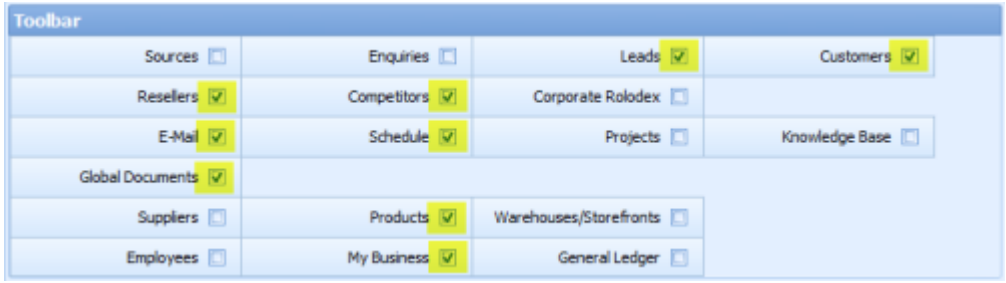
First, we will address enabling icons on each of the tool bars.

The 'Tools' icon is highlighted in the example below which corresponds to the main toolbars in Tradepoint: Home, Tools, Personal, the Management Menu, and Flyout Panel icons on the far right of the screen.

The layout of the security settings screen works like this:

> Labels on the left side of the screen correspond to a check box on the right with the placement of the check box matching the location of the check box on the right.
> Checking off the respective check box will make the Customers icon (in this example) on the Home tool bar visible.

Ex. A.



> After checking off these check boxes logging out and then back into an Employee profile set with these settings will show only the icons that have been checked off in the example on the Home tool bar.

Image with Administrator access on profile:

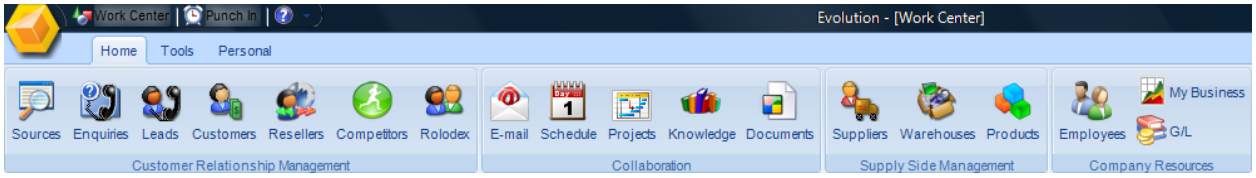
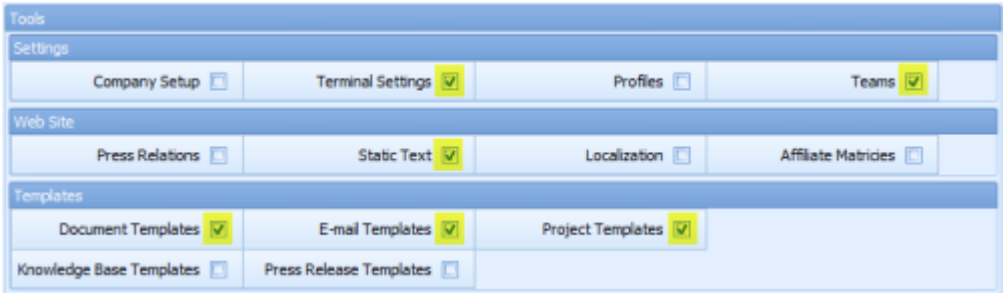


Image with specific access to show only icons checked off in Ex. A:

Icon visibility to the Tools tool bar will work in the same way:

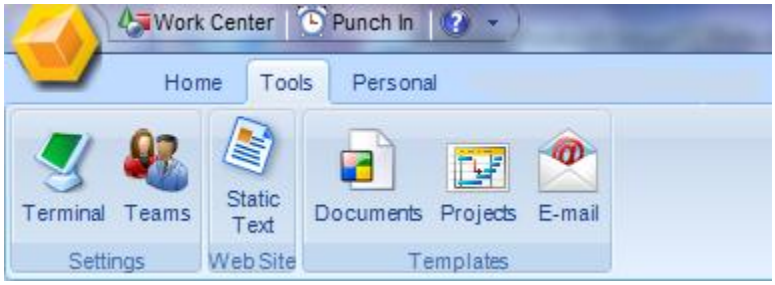
Enabling the icons on the Tools tool bar to be visible is done by checking off which icons to be visible:

Ex. B.



Then view the Tools tool bar with Administrator access:

Now view the Tools tool bar with the new preferences when logged into a different security profile as shown in Ex. B.:

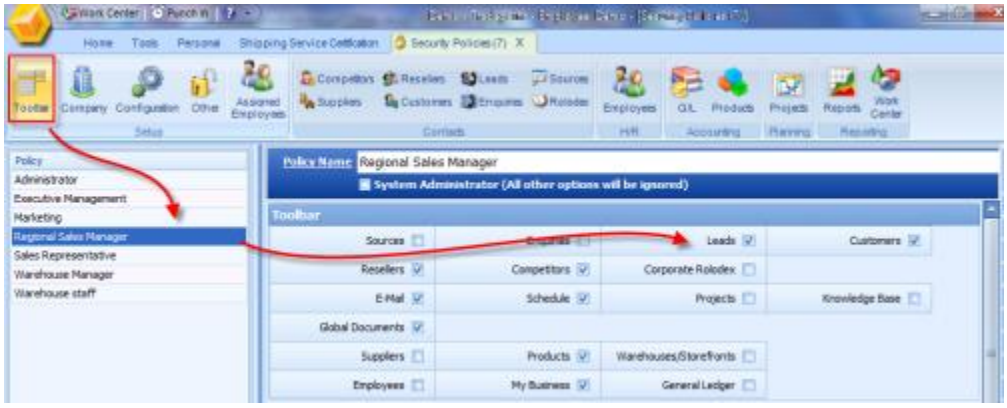


Each section within the security settings works in the same way.

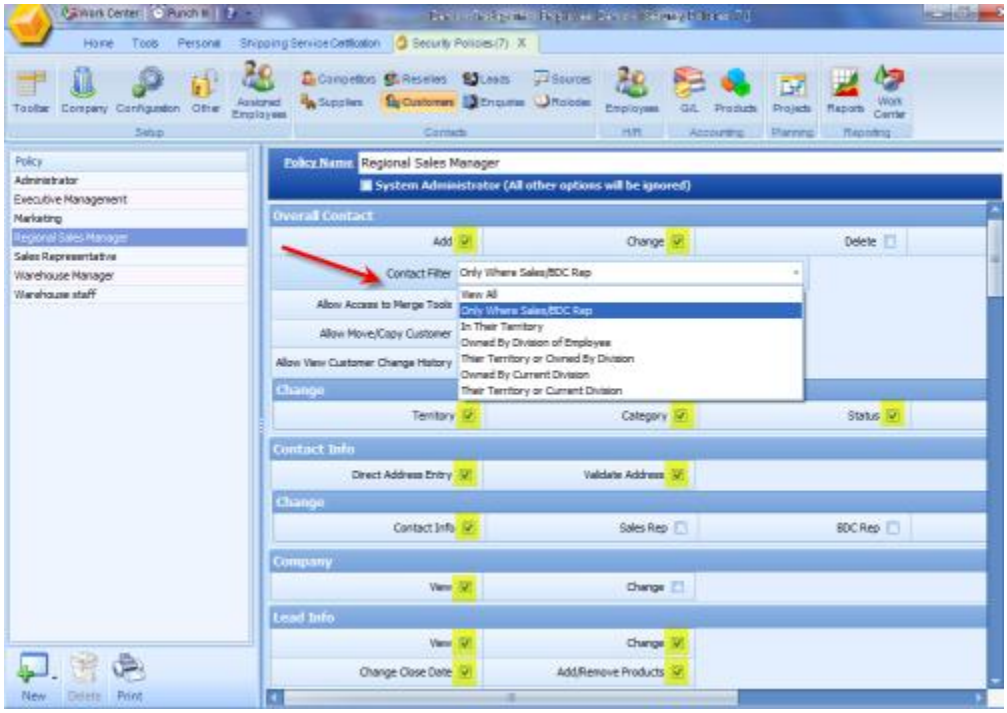
Note: Remember, any other access than Administrator will have to have each respective section Checked Off to have access enabled for your Employees. Administrator access is the only option that does NOT require options to be checked off and will over ride any other set preferences for full access to Tradepoint.

Second, enabling various fields and functions for actions within Customers will complete the security access for Customers.

Each icon checked off within the main screen of security settings will also need to have the corresponding section enabled. This means if an icon has been enabled through the Tool bar section:



Then the Customers icon highlighted above will also have to be enabled with the correct preferences to enable users to access different parts of Customer information.



Checking off each box will enable access to each field and define what level of interaction with information within Customers. Some of these fields will have different functions (such as View, Change, Revise, Export as a few examples).

Otherwise, if the icons are enabled through the Toolbar section and no other details for each icon have been enabled then each respective icon showing up on the tool bar will have no details.

Note: Administrator privileges will automatically grey out the icons in the top toolbar, since access will be granted to each section of Tradepoint

Checking off the 'System Administrator' box will override any defined profile and give any profile System Administrator access, even if other options are already set, just by checking off the box highlighted below.

CONTACTS – FILTER OPTIONS & SETUP FOR SECURITY PROFILES

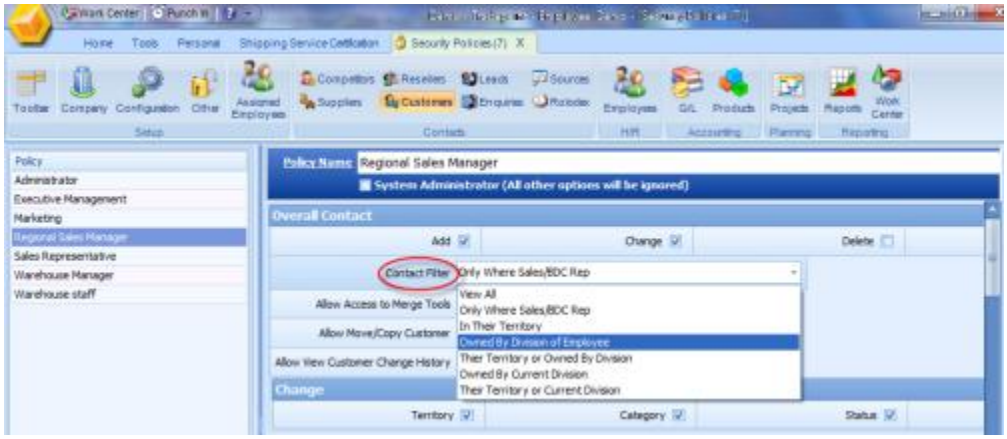
Filter options exist for contacts within security settings for each section of Tradepoint:

Sources
Enquiries
Leads
Customers
Resellers
Suppliers

This is ideal for direct sales forces, customer services, account managers and anyone who will be interfacing with customers in any specific capacity.

Following the same example shown previously, within Customers the Contact Filter option shows a drop down menu with multiple options for viewing contacts.

This makes it possible for Tradepoint to hold thousands of contacts across multiple companies and/or Divisions while having specific profiles only see contact relevant to their role and company they are affiliated with.



View All - Allows a user access to all customers across all Divisions and Companies.

Only Where Sales/BDC Rep – This will enable a user to have access to contacts where they are assigned to a contact as a Sales Rep or as a BDC(Business Development Consultant) Rep.

In Their Territory – If your company uses physical Sales Territories (these are setup through the Setup and Configure Tool under Employees) then an Employee will only have access to contacts that are within their assigned territory.

Owned By Division of Employee - This option will allow an Employee to view all Customers that are assigned to the Division/Company they have permissions to. *This is setup at the time an Employee profile is created.*

Their Territory or Owned by Division – This option will enable an Employee to see contacts within their assigned Division/Company or if it is within their territory. In this case there may be some overlap meaning if an Employee has access to all Customers within one Company/Division they may also see others from other Divisions if they are assigned within their physical territory.

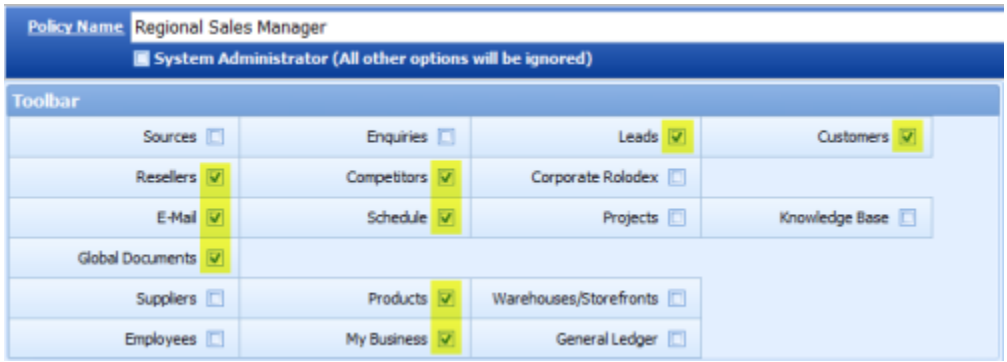
Owned by Current Division – This option will allow Customers to be accessible only by the assigned current Division of the Employee, overriding other options like territory.

Their Territory or Current Division – This option will filter out contact by the current Division a user is signed into or by territory.

Functions – Options for Information

Within security settings additional options for actions exist for numerous types of information. Several examples include:

The ability to Add, Change, Delete, or Print out a Customer Contact.



Enable the ability to view or change specific fields within Company or Lead information. For a user to also have access to View, Add, Change, or Delete Opportunities within a Customer account.

Policy Name: Regional Sales Manager
System Administrator (All other options will be ignored)

Overall Contact
Add ☑ Change ☑ Delete ☐
Contact Filter: Only Where Sales/BDC Rep
Allow Access to Merge Tools ☑
Allow Move/Copy Customer ☑
Allow View Customer Change History ☑

Change
Territory ☑ Category ☑ Status ☑

Contact Info
Direct Address Entry ☑ Validate Address ☑

Change
Contact Info ☑ Sales Rep ☐ BDC Rep ☐

For personnel information within a business contact there is the ability to view, add, edit, change, and remove different items within personnel.

Personnel
View ☑ Add/Remove ☐ Change ☑
Allow Move/Copy Personnel ☑
View S.I.N./Social Security # ☑
Change Communications ☑

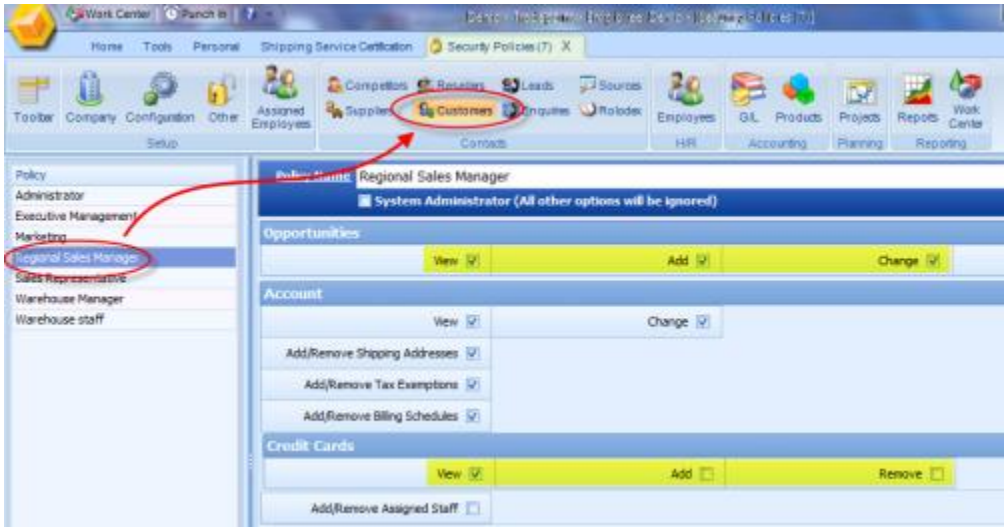
Roles
View ☑
Add/Remove ☑
Change ☑

Web Security
View ☐ Change ☐

Appointments
View ☑ Add/Remove ☐

Within accounting functions the ability to add, complete, remove, and remove if posted allow specific functions to be active with Employees.

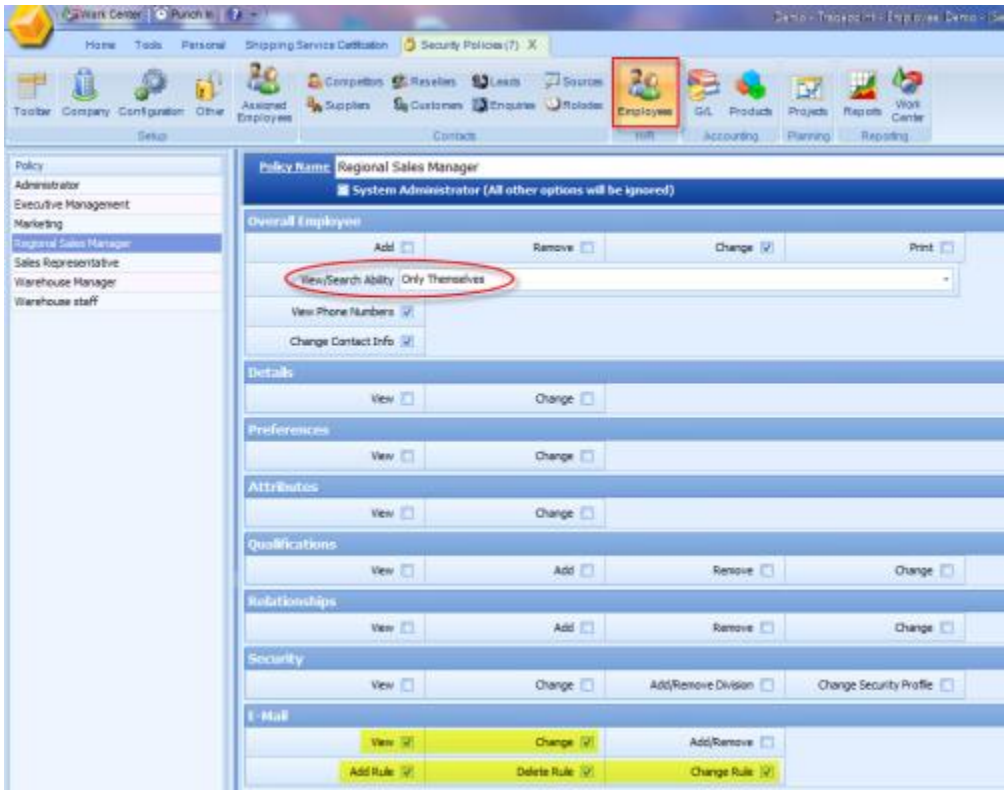
This is ideal to enable and separate out functions for different groups such as sales and customer service roles to be able to perform specific actions but also ideal for Accounting folks to be able to complete and edit items as necessary.



Employee Access – Email & Schedule Access for a Security Profile

To provide your Employees the ability to have access to their edit their email or specific information about the ability to synch with Outlook or to a Blackberry or Smartphone and schedule settings within Tradepoint these are the settings and how they should be enabled for their security profile.

An example below shows the Employees section of Security Settings with preferences enable to allow access to email and schedule functions for an Employee profile.



Note that the contact filter is set to view only their own profile and subordinates for the Regional Sales manager. The contact filter options can also be set to only themselves, and view all.

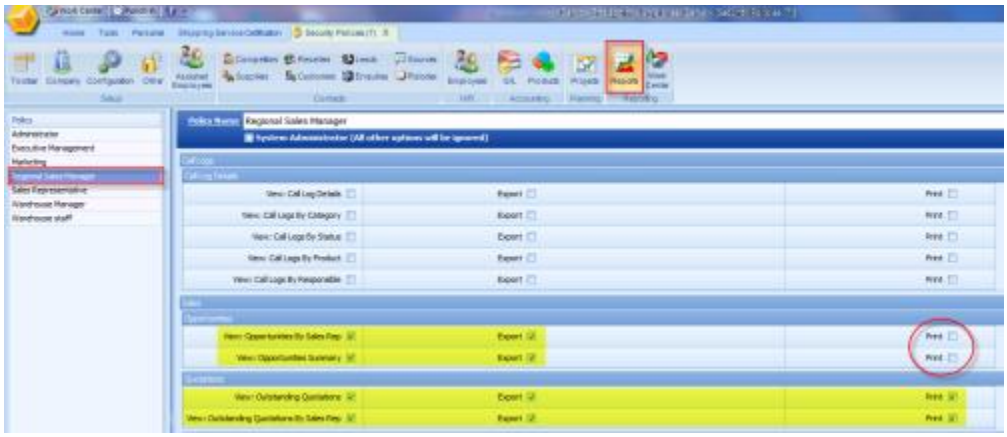
This is just one example of how to enable the functions within an Employee profile for Employees to actively manage their Email and Schedule.

Note: if an icon on the tool bar section of security settings has NOT been enabled then any options checked off anywhere else will not be viewable since the icon will NOT be viewable from the Home, Tools or Personal tab.

EMPLOYEE ACCESS – REPORTING OPTIONS

Reporting options is important for convenience and the ability to act fast based on available information. Access to the My Business reporting section for a security profile can be accessed for specific functions just like other sections in Tradepoint. Options available include:

View - View only access for reporting data
Export - Allows report to be exported to multiple files types
Print - Allows report to be printed and exported to multiple file types



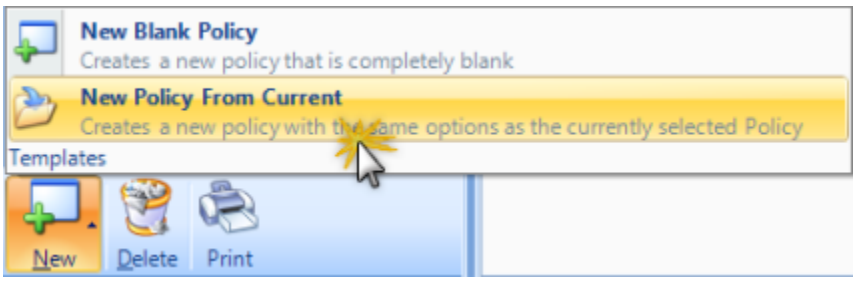
Enabling reports does entail going through each section of reports and checking off each option, at least one time for one profile. After one profile has been created the option for creating a new profile from an existing security profile will shorten the setup time considerably.

CREATING A PROFILES FROM AN EXISTING PROFILE

Creating a security profile from an existing security profile is done easily with the options in the 'New' icon in the lower left of the Security Profiles screen.

First, highlight the Security Policy to base the new policy on.

Then from the 'New' options choose the 'New Policy from Current' option and your new policy will be created with ALL of the options of the highlighted policy already checked off.



Note: This is the easiest way to setup multiple security profiles. Create the first policy and then create additional policies easily making only minor adjustments.

Employee Profile & Setup

Providing access to Tradepoint is done by creating an Employee profile in the Employees section of Tradepoint. Once an Employee profile is created and a Login/Password established an Employee will be able to login on their machine directly or any other computer in a company with Tradepoint.

This chapter will illustrate all of the steps involved in creating and shaping an Employee profile with all options for preferences.

Contact Information

Establish an Employee's basic information to start a profile. This is done through the Contact Information screen within Employees.

Opening Employees and clicking on the 'New' icon on the lower left will start a new profile.

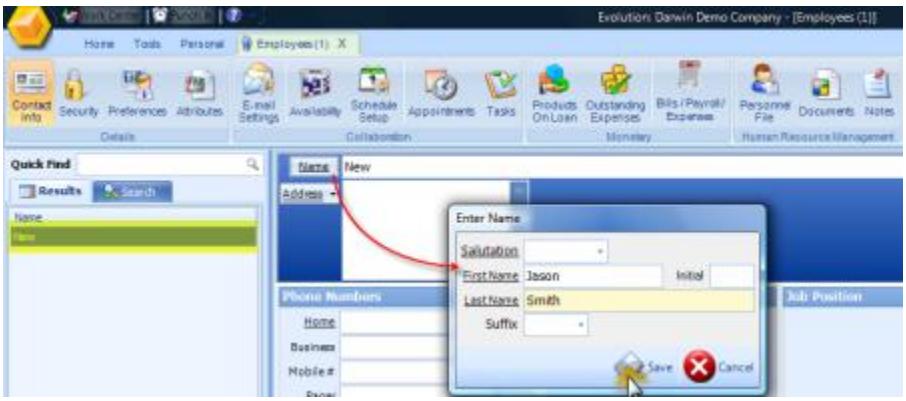
The only required fields on the Employee Contact Information page are Name, Address, and Home Phone Number.

If any one of these is not filled out then a red ball will pop-up when you attempt to go to another screen.

Note: Clicking the 'Escape' key on your keyboard will stop the new Employee account and take you back to the previous screen you were working on.

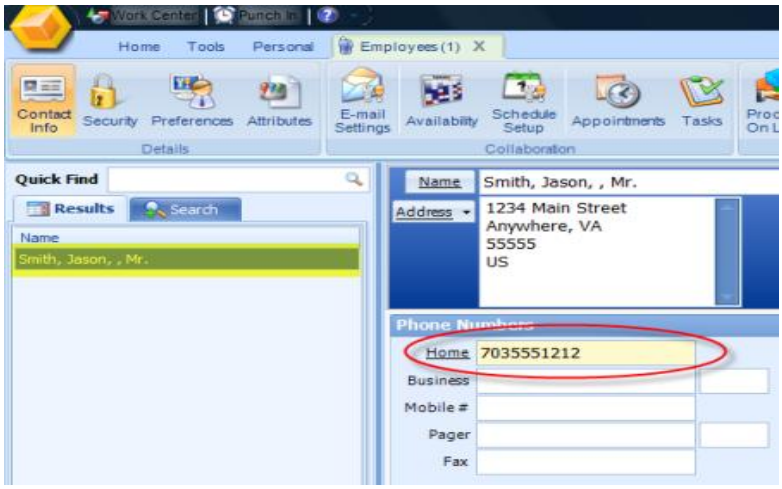
The Name and Address fields include a wizard for entering in data. When these are used the name and address information will only have to be used once and all activity created by this Employee will be tracked. The Employee name and address will pre-populate where applicable correctly throughout Tradepoint.

Employee Name (This only has to be entered once)

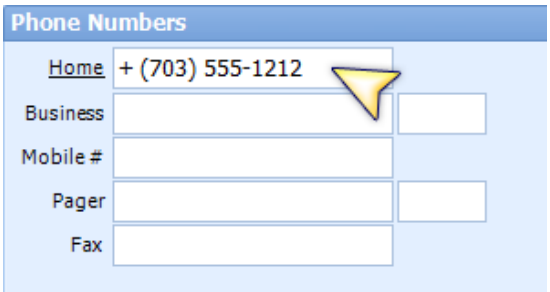


Employee Address (This only has to be entered once when the wizard or address format is used)

Employee Phone Number: Phone numbers can be entered in with no formatting since Tradepoint will automatically format phone numbers for you.



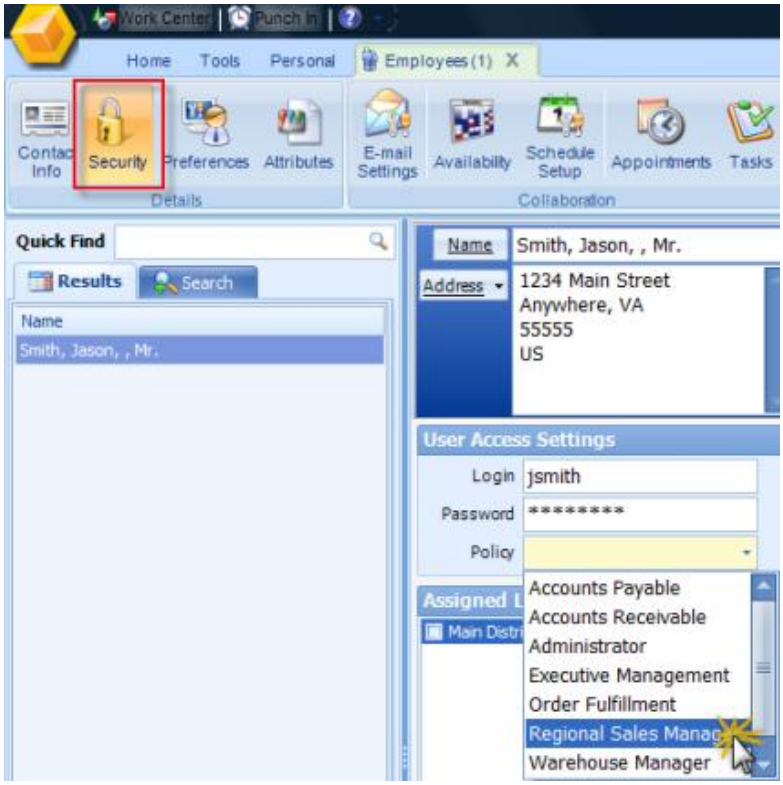
Phone number formatting will be consistent throughout Tradepoint with numbers being formatted automatically throughout all contacts.



Security & Company Access

The next step in providing access to an Employee is to create a Login/Password and provide access to a company or a specific Division.

Employee login settings are editable by someone with Administrator access should these settings need to be adjusted, or a password need to be reset.



A Login/Password is created by typing directly into the Login and Password fields.

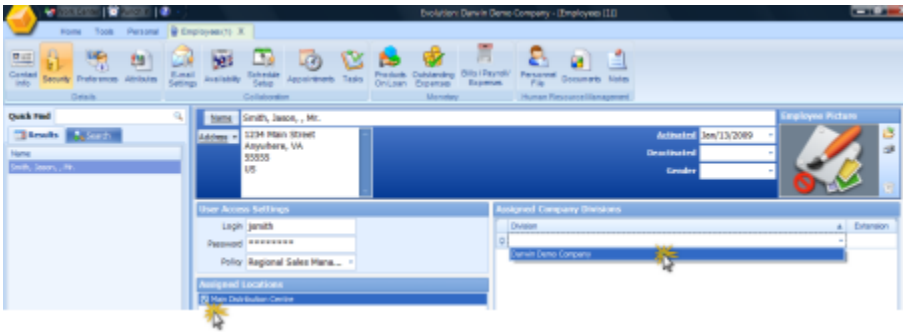
The password field will be coded so it will not be visible.

Choose an active Security Profile from the drop down menu in the 'Policy' field.

A location (this information is pulled from Company Settings for different divisions) can be checked off if there are multiple locations available for Employees.

Division access is provided through the drop down options of available Divisions. This option does allow different Employees access to different divisions within your company.

Likewise, access can be restricted by removing the Division in this section of an Employee profile.

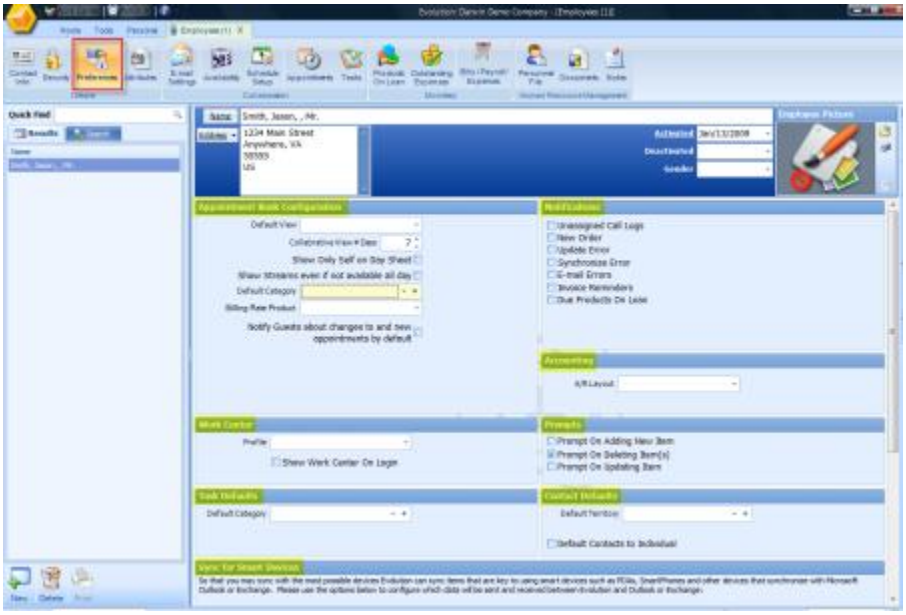


Employee Preferences – Define the User Experience

Details for employee preferences will define each users experience from what screens look like to defaults for Category setup for Tasks, how email is used and extending email to a Blackberry or Smartphone and Exchange Server options.

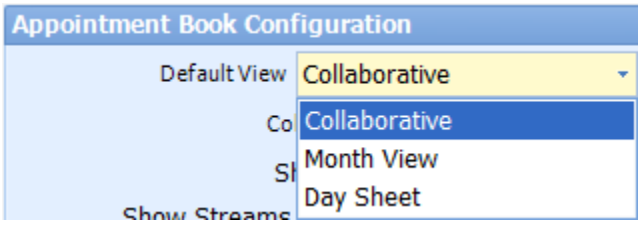
Preferences are on one screen within Employees.

Each of the sections below deals with each group of preferences within this section and how they shape a users experience.



Appointment Book Configuration

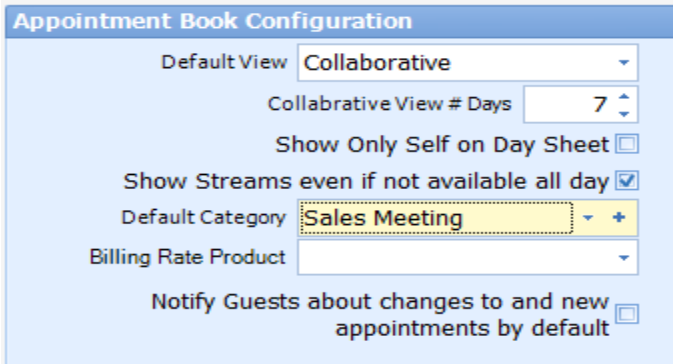
Appointment book configuration preferences shape how your Schedule looks as default settings. *Tradepoint does have Schedule settings that allow you to change your Schedule appearance as necessary.*



Collaborative View – Shows a default weekly view of the Schedule with any other Employees as well as your own profile being visible

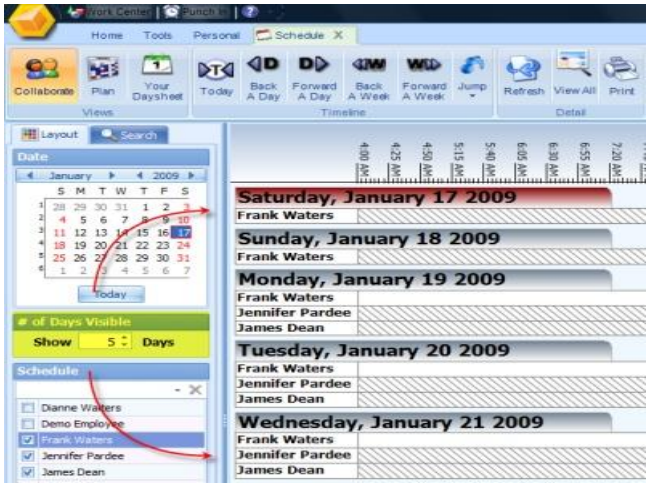
Month View – Shows a monthly view of the Schedule

Day Sheet – Shows a daily view of the Schedule with any other Employees a Schedule is being shared with.



Remaining Appointment Book Configuration Preferences include:

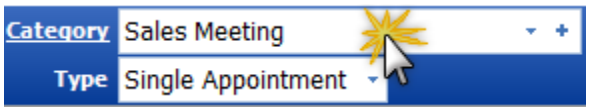
Collective View # Days – This will show as many or as few days as set of a Schedule (Applies Only to Collaborative View)



Show Only Self on Day Sheet – Will show only the user's profile on the ***day sheet view*** of Schedule (if user is sharing Schedules with others)

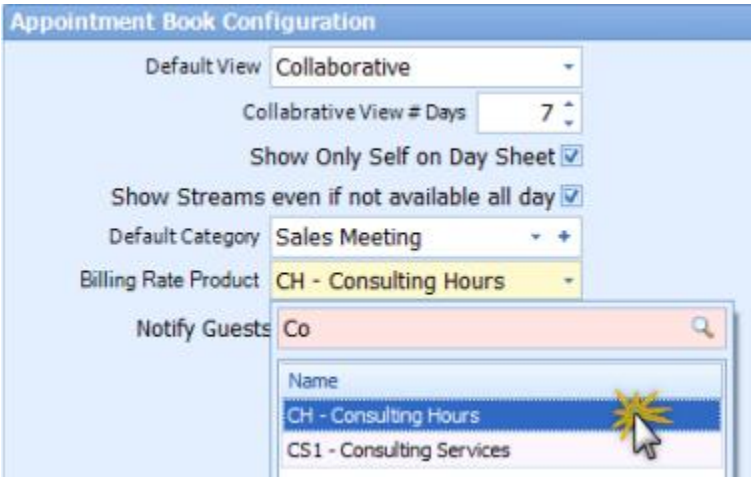
Show Streams even if not available all day – Will show a user's Schedule even if they are not available or scheduled for Holidays

Default Category – Will be the Default Category in and Appointment created. (This is Editable through the plus button accessing the Setup & Configure Tool)

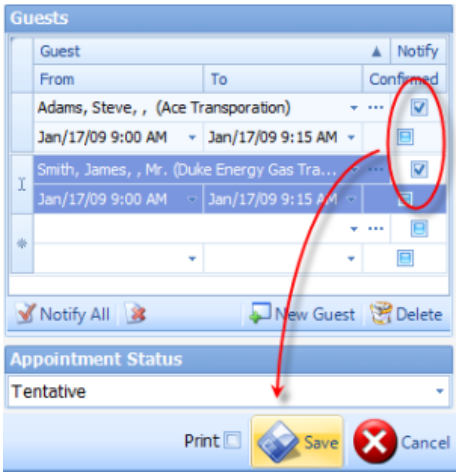


Billing Rate Product – Assign a Product which can then be invoiced against time scheduled by user (Applies to individual user profile only)

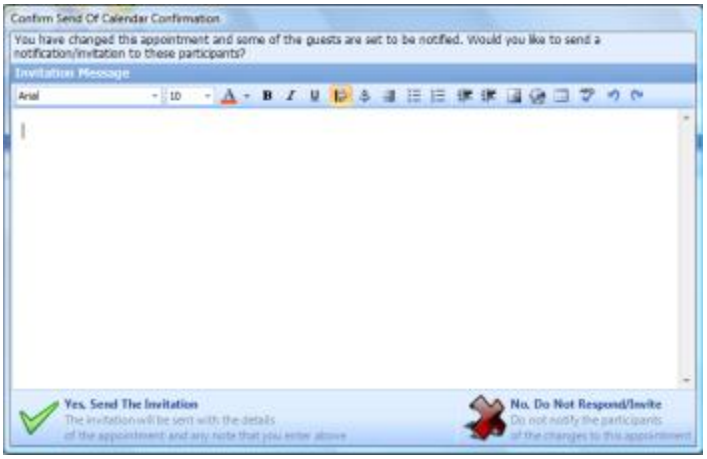
This will access the Products that have been setup within Tradepoint.



Notify Guests about changes to and new appointments by default - Checking this option will prompt an emailed message to any Guests on Appointments when an Appointment is created or changed.



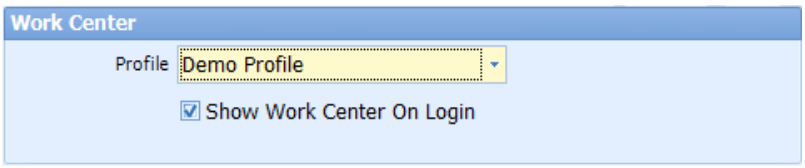
The email notification screen will then appear to send out a new appointment or any changes to an existing appointment.



Any new information typed into this screen or the appointment notes will be emailed to the email address on file for the Guests (if there is one in the guest contact).

Work Center

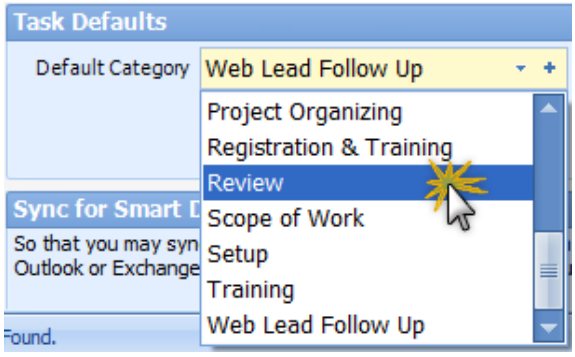
Set the Work Center profile and default to automatically show the Work Center when you login. Work Center profiles must be set up within Security Setting profiles.



The Work Center can always be accessed through the Work Center icon in the upper left corner.

Task Defaults

A Task Default will appear in every Task created as the default Category. This will allow quicker Task creation and can be edited as each task is created.

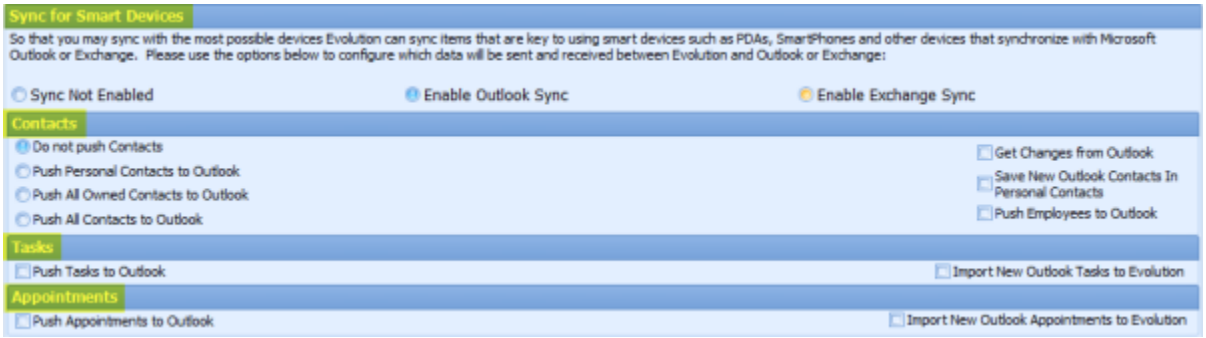


Synch for Blackberries & Smart Devices

Synch options for Blackberries and Smart Devices will automatically synch your Tradepoint Email to your SmartPhone or Blackberry based on the settings chosen here.

Three sets of details can be specified for a synch with your Blackberry or SmartPhone for Contacts, Tasks and Appointments.

Tradepoint supports Exchange Server Synch as well as synch with Outlook for devices which can use Outlook or support POP3.

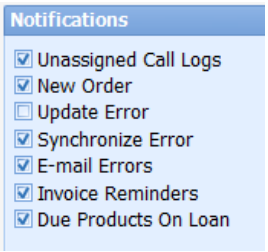


Be sure your settings are active on your Blackberry or SmartPhone are active for email.

Note: The options for pushing ALL contacts will include ALL contacts within Tradepoint to your Smart Phone or Black berry. The personal contacts push will only push the contacts within your Personal Rolodex.

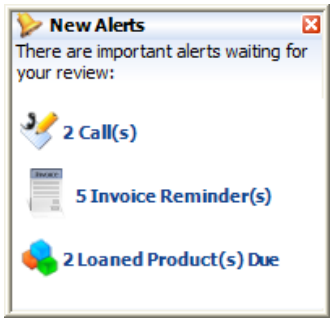
NOTIFICATIONS

Notifications will automatically provide alerts and notification for different types of events within Tradepoint. Some of these are recommended for Managers or System Administrators however most of them are related to everyday operations.



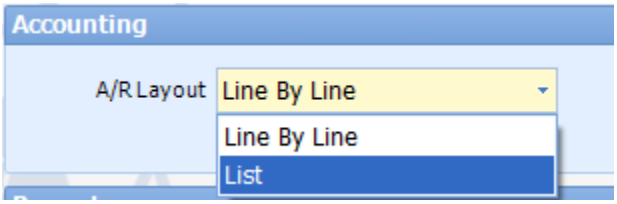
Update Errors and Synchronize Errors notify you of any errors in the updating or synchronization (this can also be affected by periodic Internet connection problems or any time outs in an Internet connection).

The remaining options can be set based on the users profile and will notify you as they occur through the same alert system which notified you of new activities in Tradepoint. (see image below)



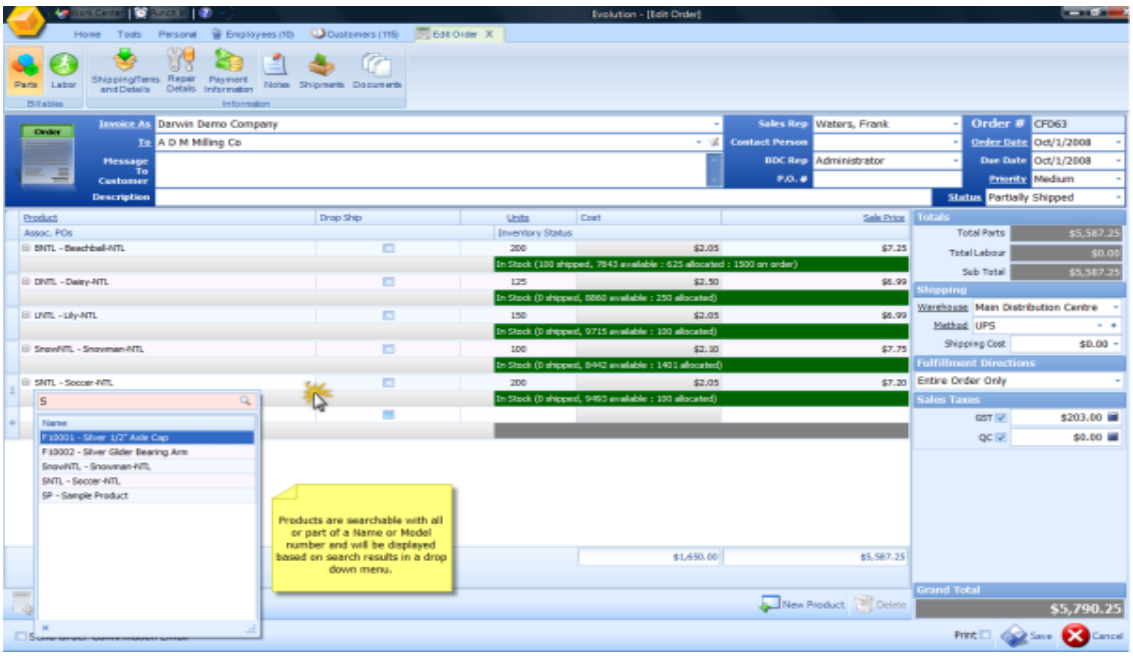
ACCOUNTING VIEWS

Tradepoint provides 2 accounting views for orders, Line by Line and List, for your Order screen for easy viewing of your information as Orders are entered.

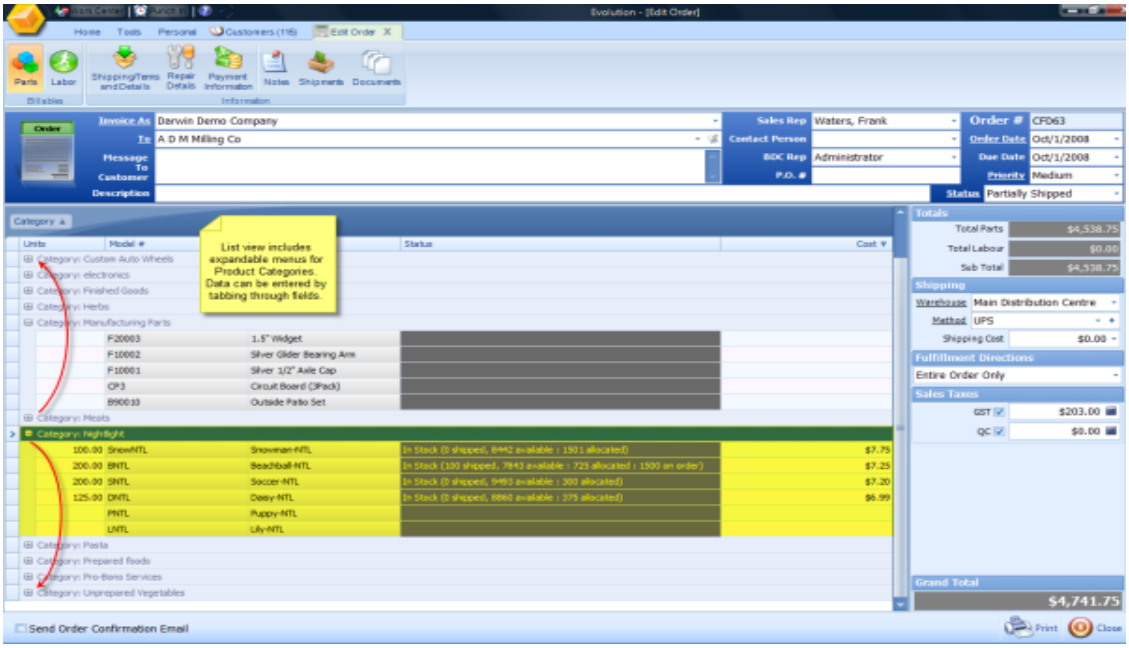


An Example of the Line by Line view is below. This view is ideal when there are more than a few dozen products within Tradepoint.

Line by Line View ex.

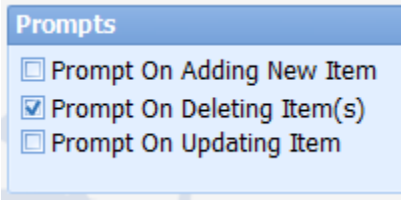


List View example.



Action Prompts

Action prompts can be set which will prompt you every time an action has been precipitated in Tradepoint. The default prompt in Tradepoint is for deleting items which will prompt you that an items is about to be deleted and will allow you to stop before it is deleted.



The remaining prompts can be set as necessary in each Employee profile.

Qualifications

For Employee profiles Qualifications is intended to hold detailed information about each Employee and their qualifications. The fields highlighted in the example below have drop down menus built in which will have to be setup in the Setup & Configure Tool ahead of time.

The remaining fields are open to enter in any additional information.

RELATIONSHIPS

Relationships will hold information about immediate family members of Employees within a company.

The Person field will pull from all contacts in Tradepoint while the highlighted Relation field does have drop down options which will need to be configured through the Setup & Configure Tool.

EMPLOYEE EMAIL SETTINGS

Tradepoint's stand alone email client supports, POP3, IMAP, and Exchange Server functions. Most types of email are supported including free webmail services, hosted email and corporate Email through Exchange Server. Email in Tradepoint includes fundamental email tools plus collaborative tools and the ability to store Emails to a Contact or Project.

Using Tradepoint Email is the fastest way to learn the rest of the software. Setup for Email can be found in your Employee profile where settings for more than one email address can be created and stored.

Employee email settings are part of an Employee's profile. Profile Settings and Security can be customized to allow Employees access to their email setting similar to having access to your email setting through other Email clients including Outlook. Multiple email addresses can be stored within one email profile and basic settings can be modified as necessary.

Email Settings are managed through the Email Settings of an Employee profile.

From the Home Tab on the main screen when you login to Tradepoint click on the Employees icon and bring up your own name from the company Employees within Tradepoint.

Email settings are done form the Employee email account screen where email is initially setup.

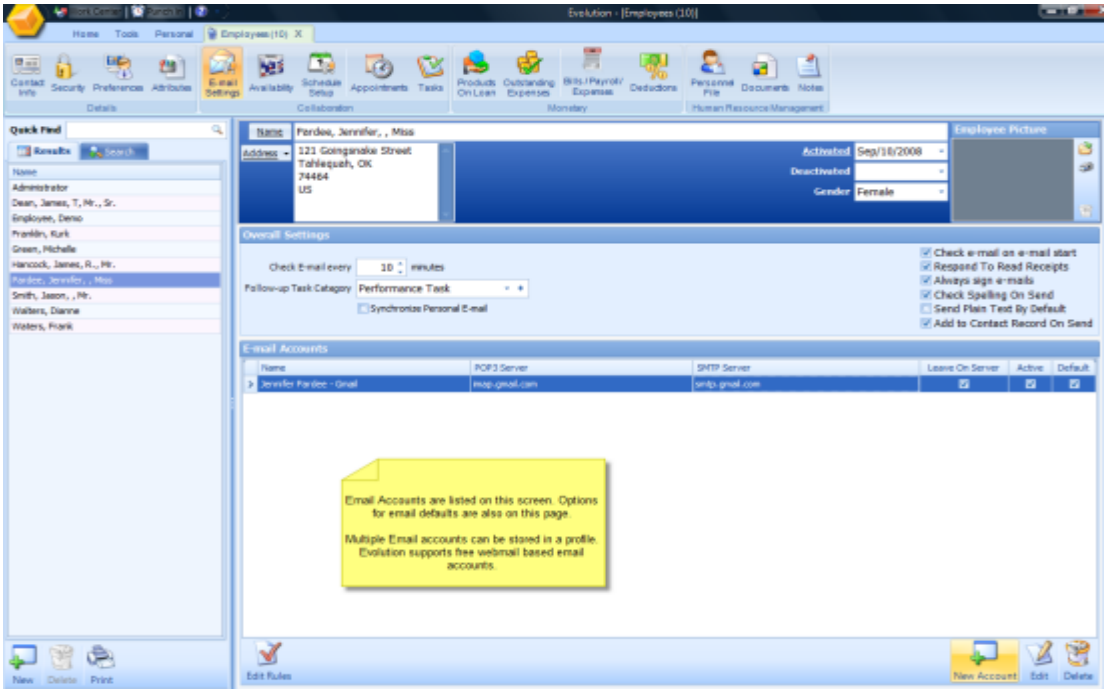
Icons for ***Creating a New Email Account*** or ***Editing an Existing Email Account*** are found in the lower right corner. The create a new account icon will redirect you to a screen to establish a New Email Account and changing an existing email account can be done by double clicking on a listed email account like the ones in the screen view above.

Note: Your Email preferences and account information can also be accessed from your main Email in Tradepoint. So, the setup through the Employee profile is usually done only when a new Email is created.

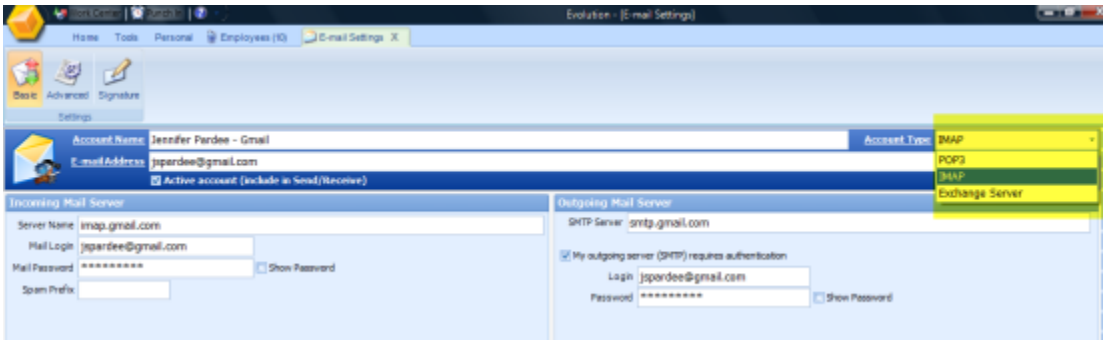
POP3, IMAP, Exchange Server Support

Creating a new Email account happens in the Email Settings screen. The highlighted 'New Account' icon will direct you to the detail screen for email settings.

A single Employee profile can have multiple email accounts and they are created the same way on this screen.



Your Email account SMTP Server Settings will be entered on the screen you see below to create a new Email account.



The Account Name needs to be your name and/or an identifying label for the specific email account it refers to.

If Darwin Productions is hosting your Email then the SMTP Server information will populate the incoming and Outgoing Mail Server Settings automatically. For other email types the rest of the Incoming and Outgoing Email Settings will need to be entered into the respective fields with any authentication (password) information if necessary.

For Outlook users this information will be found under your User Settings under the Tools Tab.

Setting up Multiple Accounts (Including Free Webmail Accounts)

Follow the steps for creating multiple email accounts within an Employee profile as many times as necessary. For free webmail accounts (Gmail, Yahoo, Hotmail, etc) be sure you have looked up the correct Incoming and Outgoing SMTP Server Settings.

Tradepoint will automatically search and attempt to validate Incoming/Outgoing Server Setting as well as any port settings as well on the Advanced Tab.

Any settings that Tradepoint finds in validating a new email address can be over written with other Server Settings easily.

Setting up POP3 or IMAP Email on an iPhone

Setting up POP3 or IMAP based email on an iPhone so that it will synchronize with an established email account that has been setup in Tradepoint is done by setting up the email account in Tradepoint initially and making sure that email is sending and receiving correctly and then setup POP3 or IMAP base Email in your iPhone using the same settings within Tradepoint.

From the main screen in an iPhone, click on the Settings icon to start a new email account. Follow the steps outlined below. ***It is not necessary to sign up for any of the iPhone email services to setup the same email account in an iPhone***.

1. After clicking on the Settings icon choose the Mail, Contacts, Calendar option.
2. On the next screen choose the 'Add Account' option.
3. Choose the 'Other' option unless the POP3 or IMAP Email you are setting up is a Gmail, Yahoo account or AOL email account.
4. Most accounts will be the 'Add Mail Account' option in an iPhone.
5. Fill in the information on the following screen: Name, Email Address, Password (which will be the same password used in Tradepoint), and a Description.
6. The iPhone will attempt to validate the email account. You will be prompted with any issues in the validation process.

Setting up Exchange Email on an iPhone

The outlined steps are for setting up an existing Microsoft Exchange Email account in an iPhone.

1. From the main screen in an iPhone click on the Settings icon.
2. On the next screen, choose the Mail, Contacts, Calendars option.
3. On the next screen, choose the Add Account Option.
4. On the following screen choose the Microsoft Exchange option at the top.
5. Enter in the Email address, username (which is the login in Tradepoint) and password.
6. The exchange email account will be validated in the iPhone (prompts will result if there are any issues).
7. The next option will be to select the info to synchronize using Exchange. Select email and then either contacts, calendars or both. The contact synch will synch with the preferences you have set in Tradepoint. ***This means if you are set to synch with only your own contacts in Tradepoint that is all that will synch in your iPhone. If you are set to synch with all contacts that will also push and/or pull into your iPhone (This means ALL contacts)***

Setting up POP3 or IMAP Email on a Smart Phone

Setting up a POP3 or IMAP based email in a Smart Phone can be done directly through the device you are using or can also be done through MS Synch if you are using this to synch a Smart Phone with a computer.

The setup is going to vary somewhat from device to device. The key information you will need to have include:

- Email Address
- Login/Username
- Password
- Incoming/Outgoing Servers
- Any Ports

Most Smartphones will validate email accounts when the basic settings are entered and you will be notified of any issues with information that has been entered.

If an Email account is being setup through Microsoft Synch instead of directly on the device then follow the prompts in MS Synch with the same information listed above.

Setting up Exchange Email on a Smart Phone

Setting up Exchange Email on a Smart Phone can also be done directly on the device or through Microsoft Synch. The settings you will need include:

- Email Address
- Domain Name (Optional)
- Server
- Username
- Password
- Description

When using Microsoft Synch to set up Exchange be sure to leave off any abbreviation for the Server. For example enter in mail.tradepoint360.com instead of http://mail.tradepoint360.com or http://www.mail.tradepoint360.com.

The remaining settings will be validated as soon as a synch happens between the computer with Microsoft Synch and a SmartPhone set to synch with a Microsoft Synch enabled computer. You will be prompted with any issues in the settings when the device synchs up with what has been entered in Microsoft Synch.

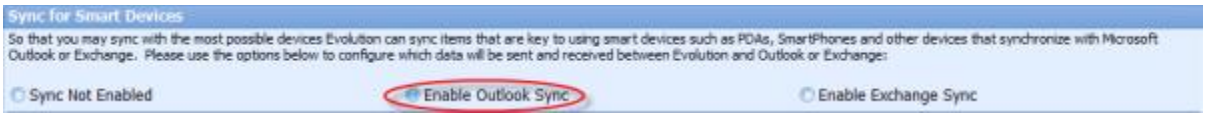
Synchronizing with Outlook

Synchronizing Email with Outlook is an option which is ideal if you want to receive your emails on another computer, or a computer away from work.

The Synchronize with Outlook option is ideal for IMAP and POP3 accounts to push email into Outlook in addition to having email in Tradepoint.

Account Settings for email can also be entered in to Outlook and Tradepoint simultaneously. Each one of these applications will prompt occasionally to be the primary application for email, when this occurs disable this prompt and you will be able to use either application for email as needed.

Synchronizing Outlook for Blackberries and SmartPhones is done through Employee preferences.

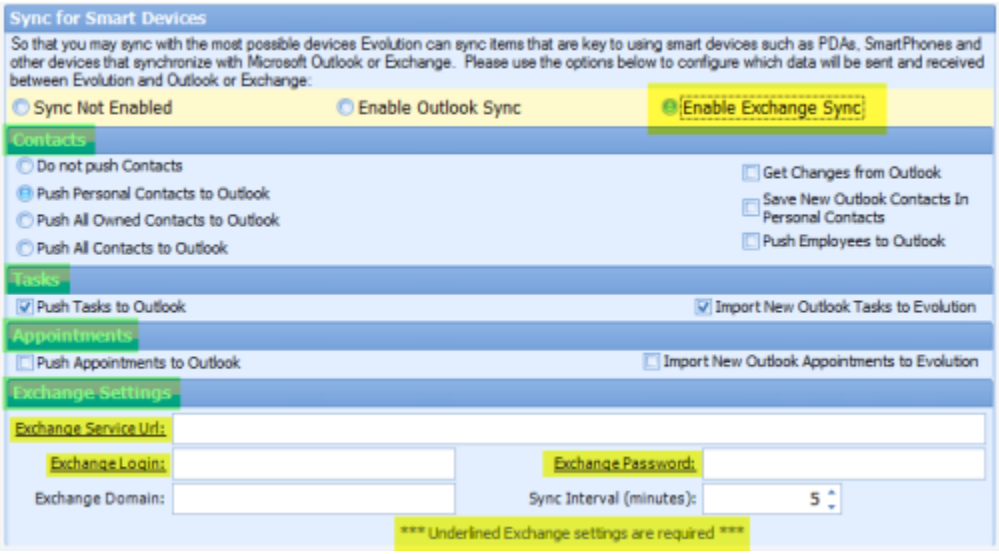


For companies who use Exchange Server the last option for Enabling Exchange Server Synch is what would be checked off to enable Exchange Synch for Blackberries and Smart Phones.

Synchronize Options for Exchange Server

Additional details for Exchange server synch preferences are also found in Preferences. Options to synchronize all or personal contacts, and calendar appointments going either to the device and also going back into the device are also in preferences.

The option to synch personal contact only will synch with the personal rolodex found under the Personal Tab in Tradepoint.

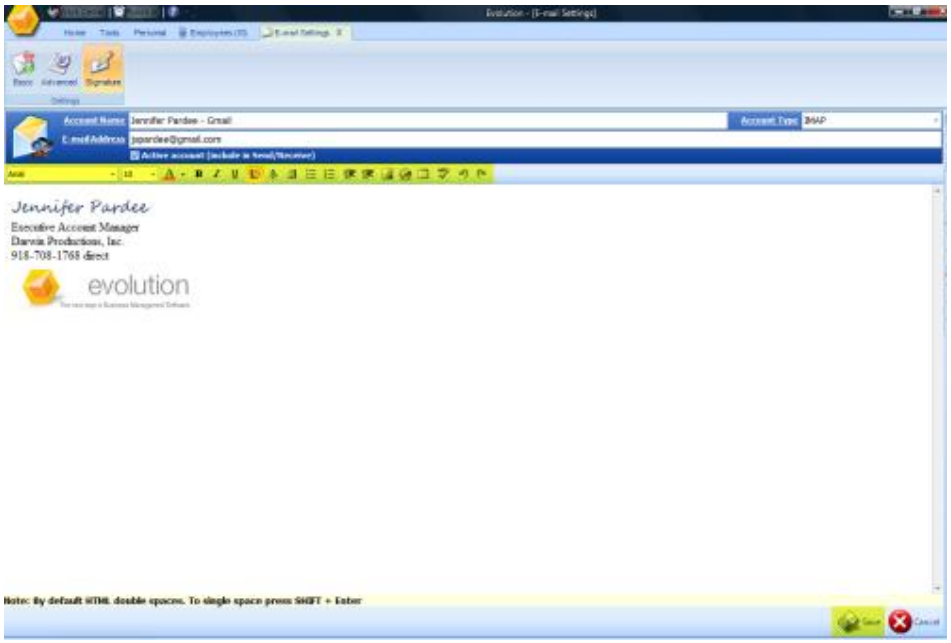


Outlook does not have to be setup with Email Settings for Exchange to be pushed to a SmartPhone, Blackberry or iPhone. Outlook can also be set up in addition to Tradepoint to have email on another computer that does not have Tradepoint.

Email Signatures

Tradepoint Email provides the ability for email signatures that include graphic elements, logos, and images as part of the signature. From the Email Settings Screen the icon labeled Email Signatures will direct you to the screen to create your signature.

Each Email address you have can have its own email signature and based on your preferences it will be added to the correct email address based on incoming and outgoing messages.

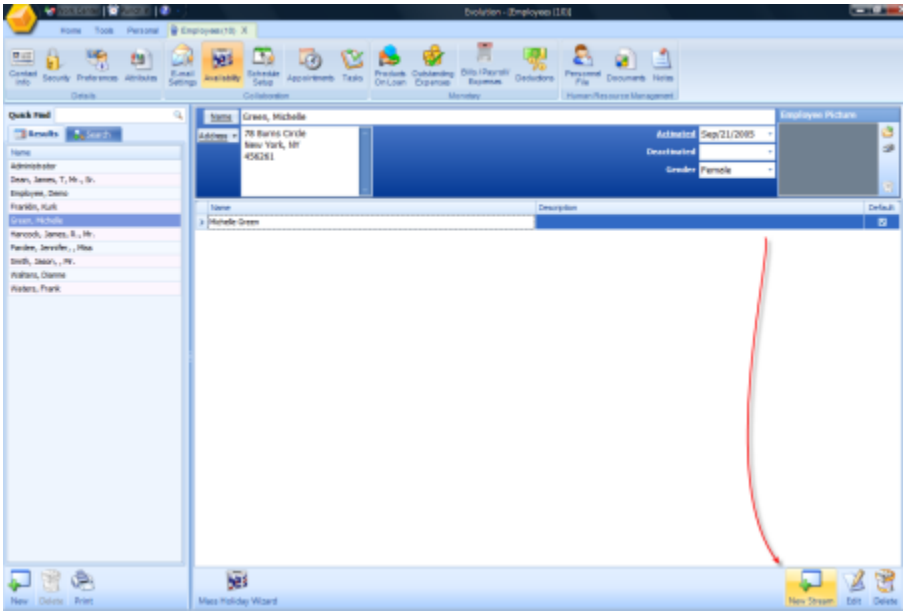


SCHEDULE AVAILABILITY

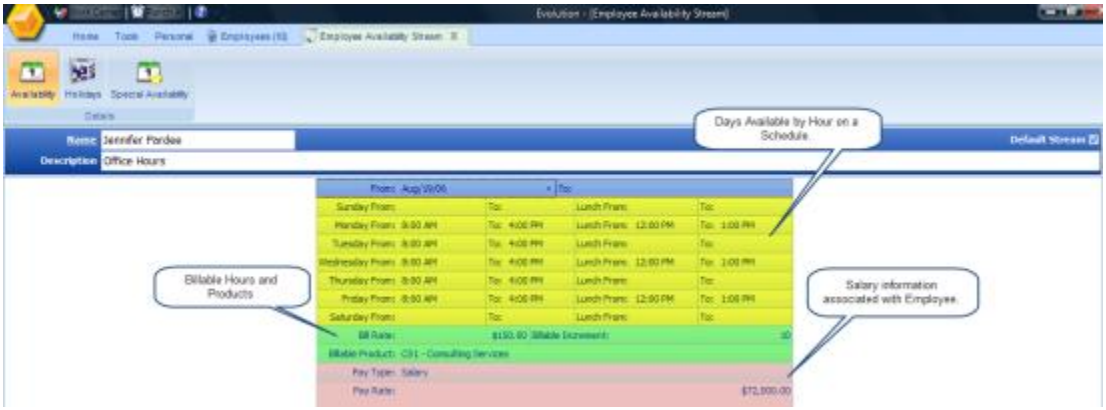
Under the availability icon within Employees is where an Employee profile is where the Schedule setup and preferences are established.

Once these parameters are setup most day-to-day functions will happen either from the main Schedule or the main Schedule in combination with the Work Center Dashboard and Flyout Panel for ongoing Appointment reminders and alerts.

Within the Employee profile you will need to establish the stream of time for your Schedule. Tradepoint allows you to establish multiple schedules as necessary. They will be displayed in this main section you see in the image below.



Once New Stream has been chosen the detailed Schedule preferences are setup in the following screen.



The top fields highlighted in blue have built in fields for entering in dates with drop down menus or the date information can be entered in directly.

Note: We recommend only setting up an opening Date in a Schedule. If an ending date is entered in then on that date the Schedule will no longer appear and will have to be re-enabled by removing the date from the 'To' field.

Hours available by week can be entered for all 7 days or only as many as you want to have available.

Any days that do not have hours will NOT appear in the Schedule as a default however, you will still be able to be included in Appointments on those days.

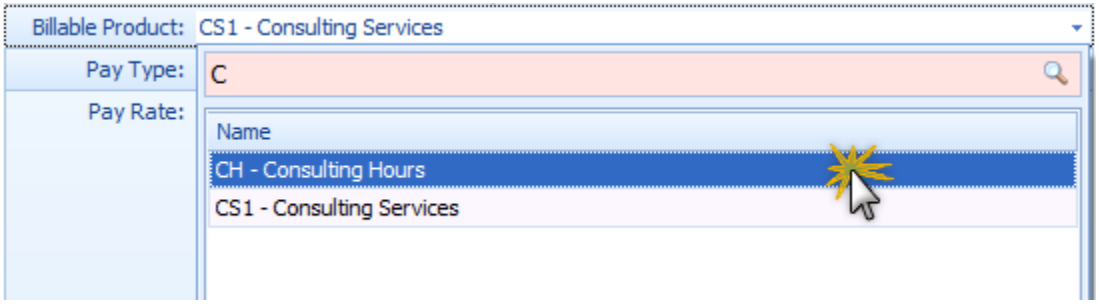
Entering in hours on Monday and clicking the Enter key will automatically enter in the same time through Friday.

Note: To clear any entered days simply highlight the field and use the 'Delete' key on your keyboard to clear out those days. Only days with hours entered here will display in the main Schedule.

Bill Rate – Corresponds with the Bill Rate for an Employee profile and will be taken into account automatically within Billable Hours for Projects or Invoiced time from the Schedule.

Billable Product – This will associate a specific product with an Employee profile and track to activities as they happen in Projects and through the Schedule similar to a Bill Rate.

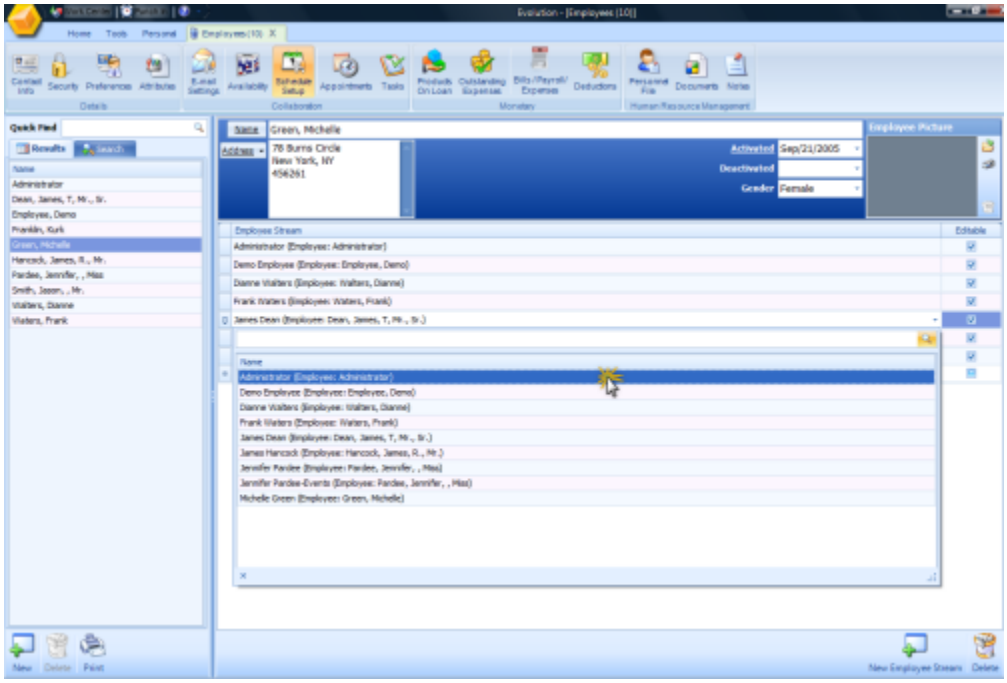
This is a searchable field that will draw on information within the products section of Tradepoint. Products supports any item your company charges money for therefore services and non-inventoried items are supported as well as inventoried items.



Pay Type and Pay Rate correspond to the Payroll within Tradepoint and will track to the Schedule based on these preferences. Commissions, hourly and salary are supported with Tradepoint.

Schedule Setup (Sharing Schedules)

Schedule setup allows you to share your schedule with others on the main Schedule. The screen structure for this is simple with the ability to choose from all Employees listed in Tradepoint.



Be sure to add yourself to this screen for your own profile to be visible on the main Schedule. The search tool will show the first 8-10 search results so, for organizations with more than 8-10 users type in all or part of a name to bring up additional results when setting up shared schedules.

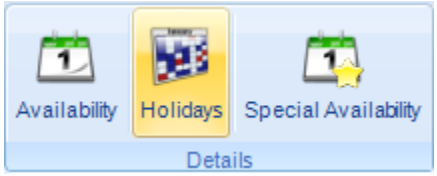
Log out of Tradepoint and log back in to have the changes become visible in the main schedule in Tradepoint.

Holidays & Time Off

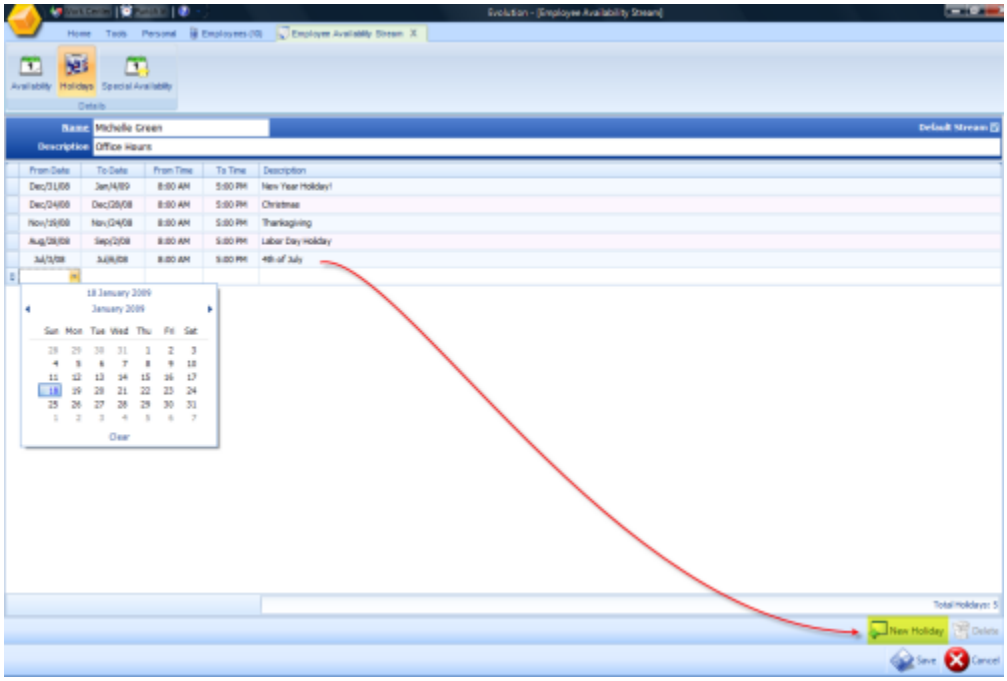
Scheduled Holidays and scheduled time off can be applied to a single Employee or to groups within your organization.

Single Employee Application

From the main Schedule Setup screen within an Employee profile click the Holidays icon.



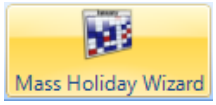
The screen listed will show fields to apply as many holidays for a given Employee which include a date range.



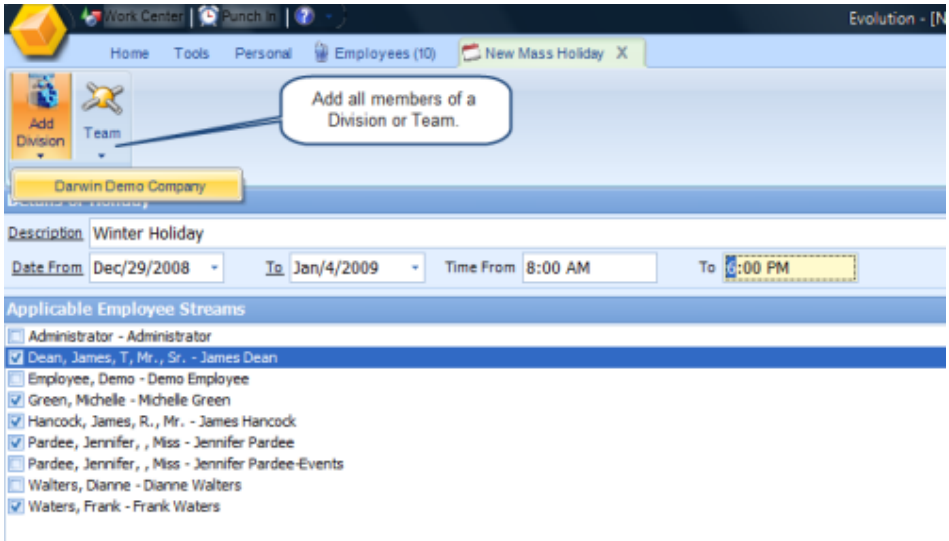
Dates and times can be entered as well as a Description which will show up in the main schedule. After all holidays have been created save your changes.

Mass Holiday Wizard

For larger organizations it will likely be easier to create holidays for a group of Employees. In this case the Mass Holiday Wizard is the best tool to apply multiple holidays to multiple employee profiles quickly.

From the Availability screen within Employees is an icon for the Mass Holiday Wizard. 

Clicking on this will direct you to the screen with all the Employees listed and fields to create a holiday where details can be applied to all or as few Employees as necessary.



Save the changes when you are finished and the details will be applied to each Employee for this holiday. Multiple holidays can be done by repeating this process as necessary.

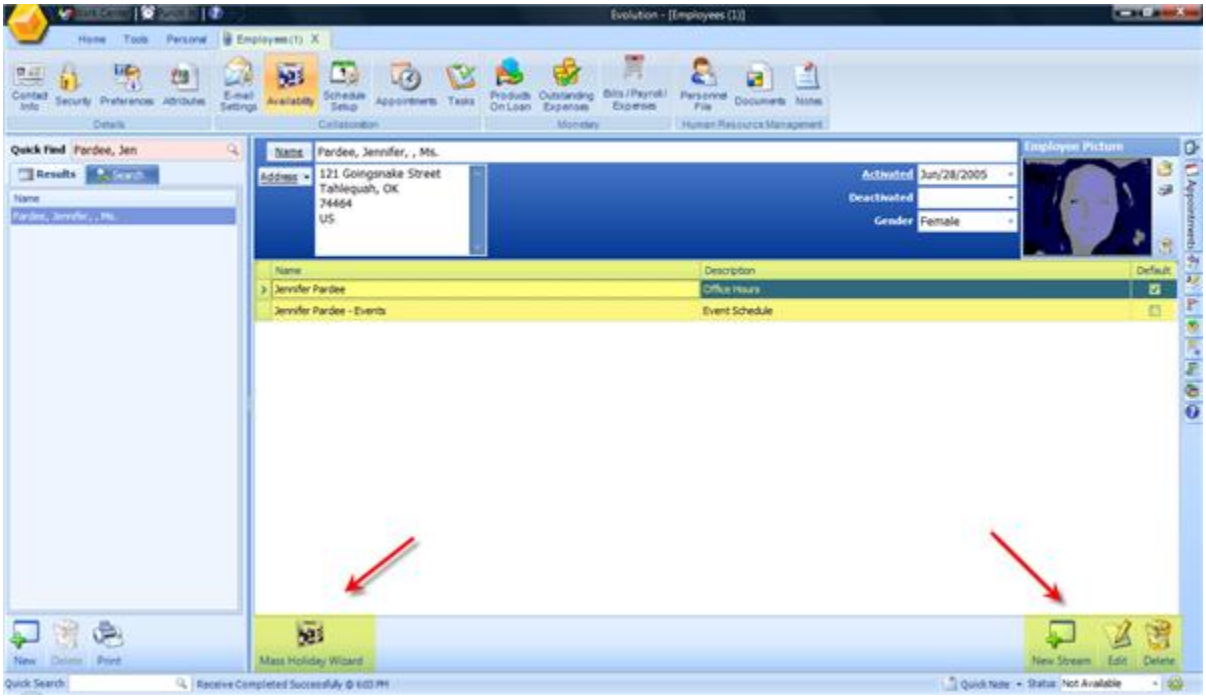
SCHEDULE

PROFILE & SCHEDULE SETUP

Tradepoint's Schedule works with the Email and CRM tools as time management and scheduling are often the next most important feature in business to email. What happens with your time and being able to schedule people often happens hand in hand with communications.

An Employee profile is where the schedule setup and preferences are established. From there most day-to-day functions will happen from the main Schedule in combination with the Work Center Dashboard and Flyout panel for ongoing Appointment reminders and alerts.

Within the Employee profile you will need to establish the stream of time for your Schedule. We call this a new stream. Tradepoint allows you to establish multiple schedules as necessary. They will be displayed in this main section you see in the image below.



This example shows two Schedules listed. Double clicking on one will open the stream to be able to;

- Change the hours available
- Add preferences for payroll (type of compensation and hourly or salaried rates)

The mass holiday wizard is highlighted in the lower left corner to apply specific holidays to everyone's Schedule as necessary. You will be able to:

- Choose which people the holiday will apply to
- Enter in the name of the holiday(this will show up in the Schedule of each person chosen)
- Specify the date and time range
- Enter in a holiday name that will show up in the dates of the holiday

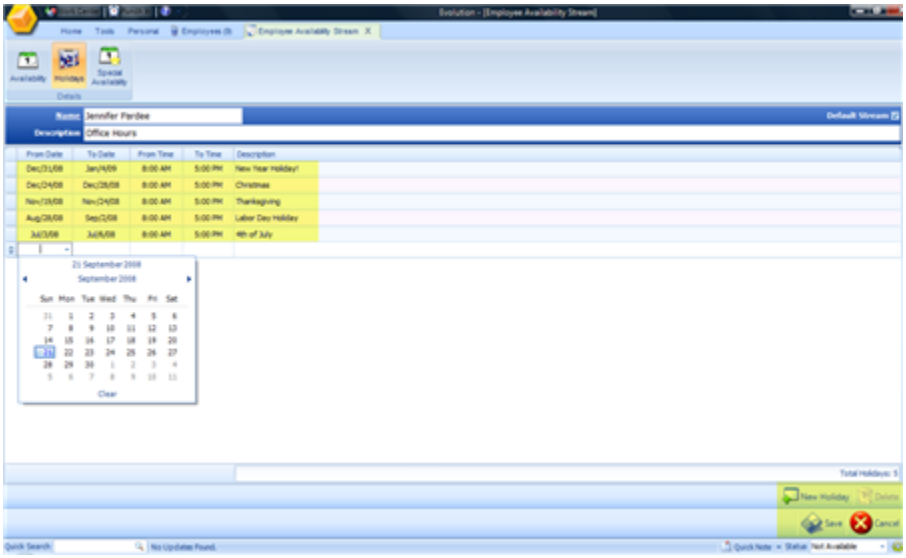
Sharing a Schedule with other Employees is done by setting other people's Schedule to your Schedule under the Schedule Setup icon.

Be sure to add yourself to your own Schedule so it is visible in the main Schedule. You will also be able to add others to your Schedule by clicking on the field under Employee Stream icon in the lower right corner. The search icon on the right of the field will open to the list of Employees and you can type in a name for specific results to share a Schedule with.

Any changes to a Schedule or Email account will take effect when you log out and log back into Tradepoint.

Holidays & Scheduled Time Off

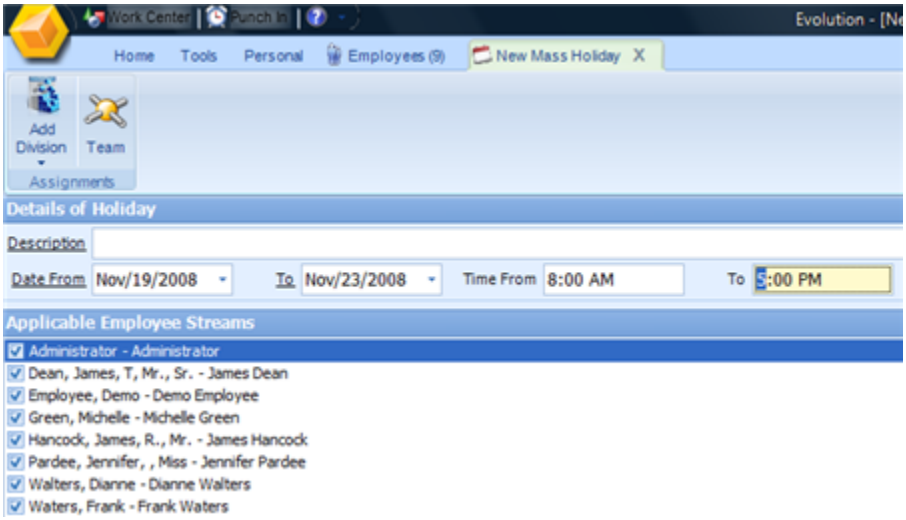
From your Employee profile within the Availability screen click on the Holidays icon to be able to enter in your Holidays.



Each Date field will have drop down calendar for choosing dates for your Holidays.

Typing in hours will display the Holidays in the schedule for yourself and others you are sharing your schedule with. If you do not type in the hours then your schedule will simply not show for that date range.

The mass holiday wizard is often used to enter in Holidays on a Schedule for multiple people at a time. By clicking on the Mass Holiday Wizard icon from the Availability screen you will be directed to this screen to enter in Holidays for your staff.

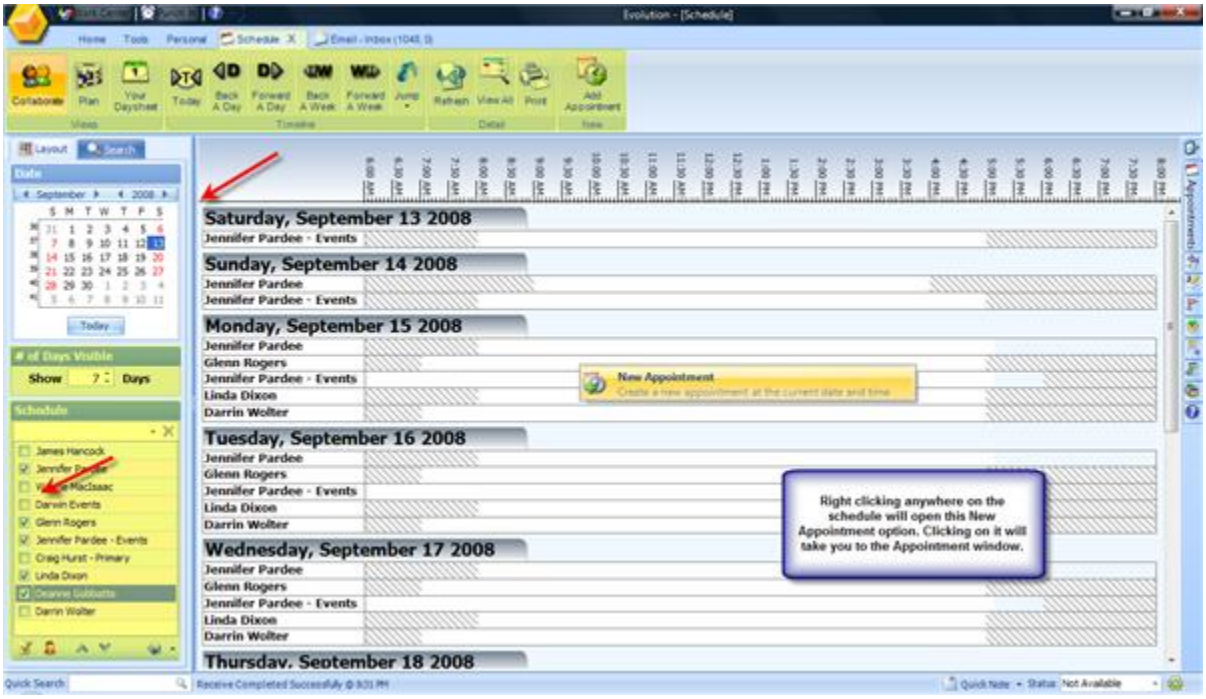


This tool also allows you to set Holidays for different Teams and Divisions. (if applicable)

Creating Appointments

Creating Appointments can be done in just a few clicks or done directly from an email as described in the email Collaborative Tools section.

The default view for the Schedule is the collaborative view shown below. From this view you can right click on your own or other people's schedule to create appointments. Right clicking on the collaborative view will bring up the new appointment icon.

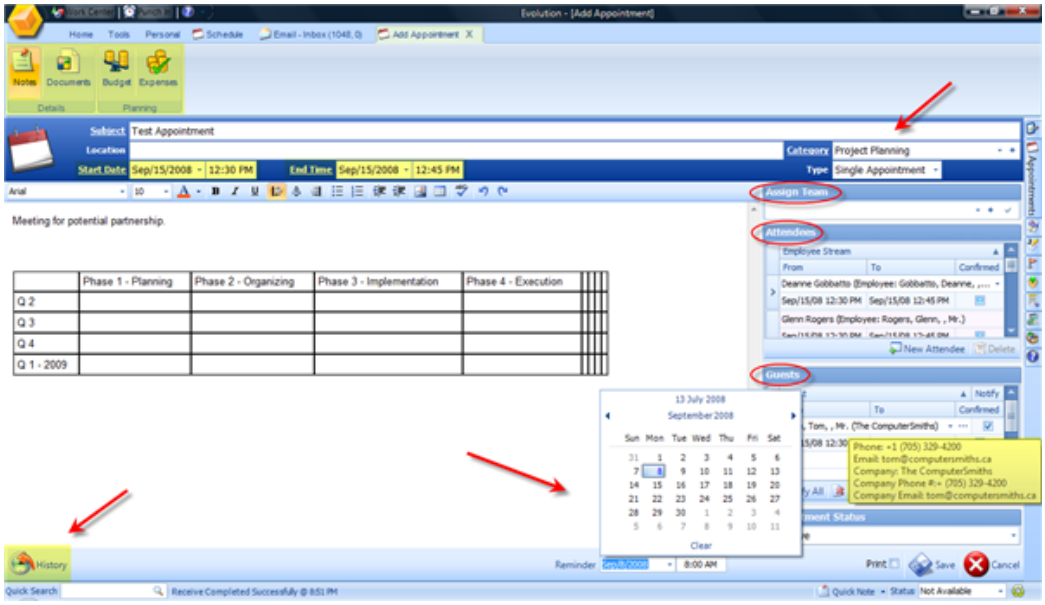


Tools available to you within this view include:

- Top tool bar to change your view.
- Standard Schedule tools to jump ahead or back within you schedule.
- Refresh your screen, Print and a New Appointment icon.
- A dynamic calendar that will allow you to jump ahead by day, month or year.
- Options to show more or less days in your Schedule using the '# of Days Visible' tool.
- Show more or less people on your schedule by checking off names as necessary.

A detailed view of the new appointment screen shows the details of the new appointment. From here you can:

- Specify the dates and times of the Appointment
- Add Employees or Guests to the Appointment
- Select a Category for the type of Appointment (Categories correspond to the colors of the Appointments that show up in the main Schedule)
- Add Documents(that will be visible to Employees that have been added to the Appointment
- Choose a recurring Appointment (daily, weekly, monthly, etc) with the drop down options in the Type field
- Add a team to an Appointment (this option does have to be setup using the Teams option from the Tools tab)
- Add or Copy content and details of the Appointment within the main notes screen (note the editing tool bar at the top of the screen with formatting tools)
- Add Reminders for Employees
- Send Notifications to Guests that have been added to the Appointment
- Check the History of the Appointment (how many times it has changed and who has changed it)



All of your date fields including setting the Reminder/Alert are dynamic so clicking on the dates, month, or year will take you to that date. Hovering your mouse over any Guests in the appointment will show all of their contact information for easy access without having to click any further.

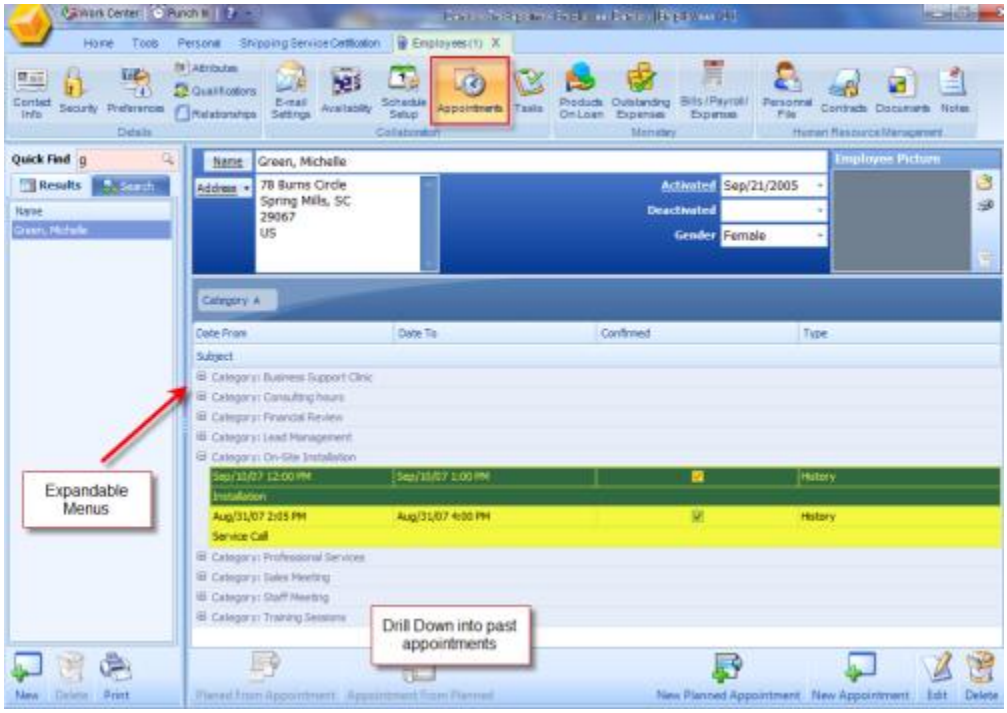
Any Guests will receive an invitation provided there is an email address on file within their contact. The invitation window will pop up at the time you Save the Appointment.

The email invitation will include any details about the Appointment you have entered in here as well as anything else you type into the invitation. *So, in this case the recipient will receive the Notes including the table you see above plus the information in the invitation window below.*

If you do not want to send the Invite then choose the 'Do not Respond/invite option. Also, if you make any changes to an Appointment you will be prompted to resend the invitation as well so, clicking no will close this window and not send the Invitation.

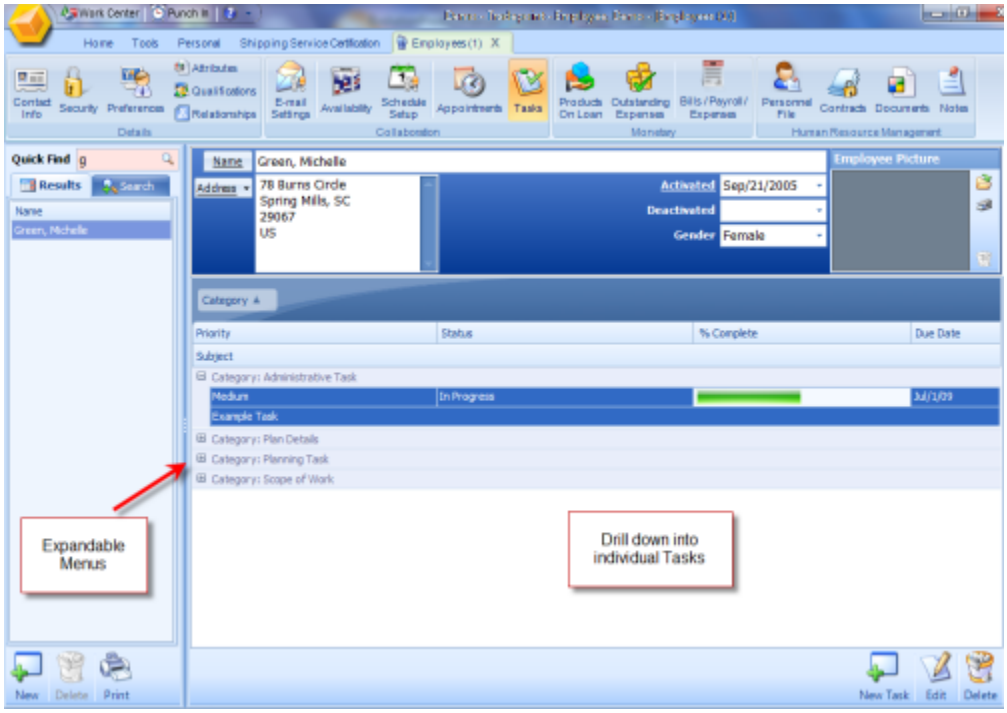
APPOINTMENTS & TASKS: EMPLOYEE HISTORY

Tradepoint keeps an active record of all Tasks and Appointments an Employee has either created or been added to within their Employee Profile.



Tools for creating a new appointment drilling down into historical appointments are also available through this screen. Appointment activity will be automatically attached to the Employee account as it happens.

Task History operates much the same way as Appointments. Found under the Tasks icon an entire history of Tasks that an Employee has created or has been added to throughout the time an Employee has had access to Tradepoint.



Expandable menus for existing historical Tasks, drill down tools and the ability to create new Tasks within an Employee account exists on this history screen.

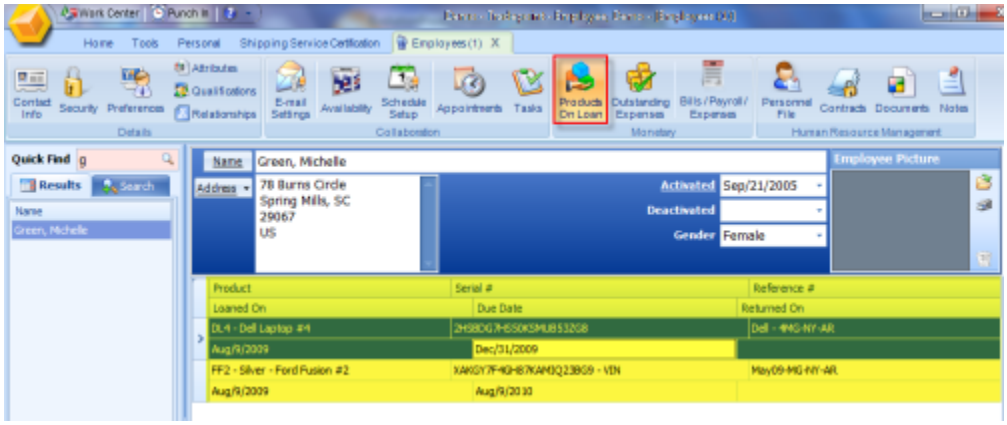
Tasks will be added to this screen automatically as they are created.

Products on Loan: Managing Assets provided to Employees

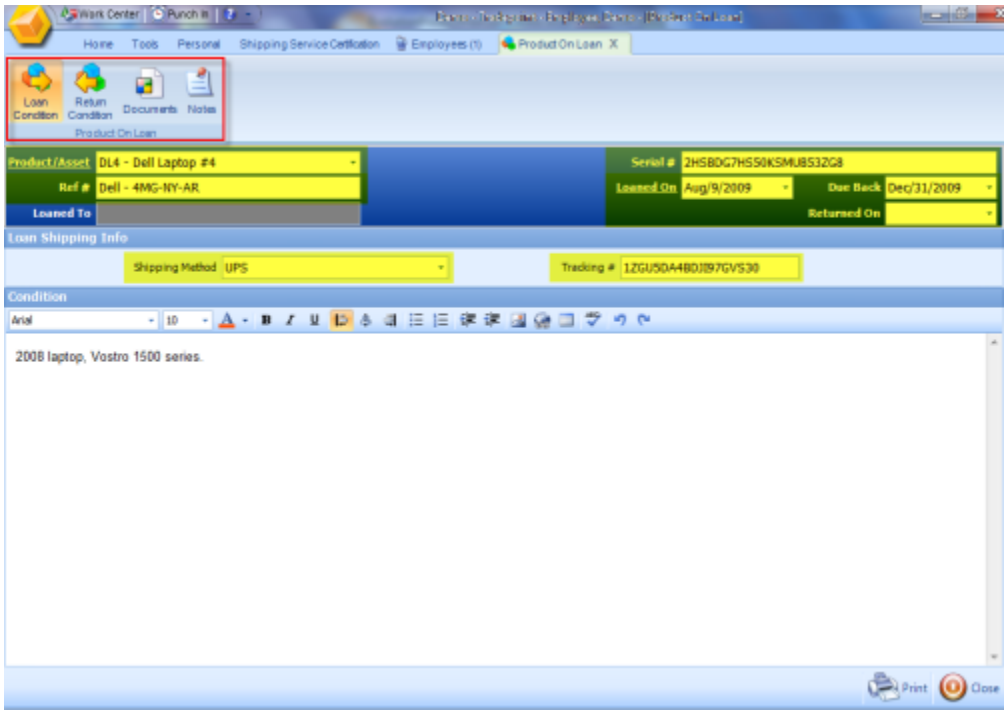
Products on Loan is a tool designed to keep track of the resources that have been given to Employees as part of their job. A typical application of this includes providing laptops, cell phones, and/or company vehicles for an outside sales force.

Tradepoint has built in tools to handle every aspect of this right down to the shipping methods used to send resources to Employees.

Within an Employee profile is the history of what has been loaned to an Employee.



Drilling down into one of these listed items give a more detailed view of options within each instance of loaning an Employee a Product/Asset.



Icons in the top left corner show tools for an item going out, an item being received back in, the ability to attach, scan or upload related documents and a notes screen for any details outside of this workflow.

Product/Asset – This field will draw on both products and assets. Both of these sections will need to have information in them to track anything that is being lent out to Employees.

Ref # - This is an open field to create your own reference number specific to this item. This field in not required to complete a Product on Loan.

Serial Number – In this example a serial number is the serial number of the laptop that has been loaned out to this Employee. For cars the VIN number would go here and cell phones the ESN or Product number associated with the phone is recommended for this field.

Loaned On and Due Back – These are the dates when an item goes out and when an item comes back in. Typically both the Loaned On field and the Due back will need a date when an item is loaned to an Employee unless the due date is open for an item.

Returned On – This is when an item is actually returned from an Employee.

Shipping Method – If anything has to be shipped out then this field will choose from established Shipping methods within Tradepoint. The Shipping methods must be setup for this option to work.

Tracking Number – The tracking number from the Shipper once it has been shipped out can be entered here.

Condition – The condition of an item when it is lent out to an Employee is entered here. In the case above the condition is just the year and model of laptop. This can be as detailed or as simple as necessary per

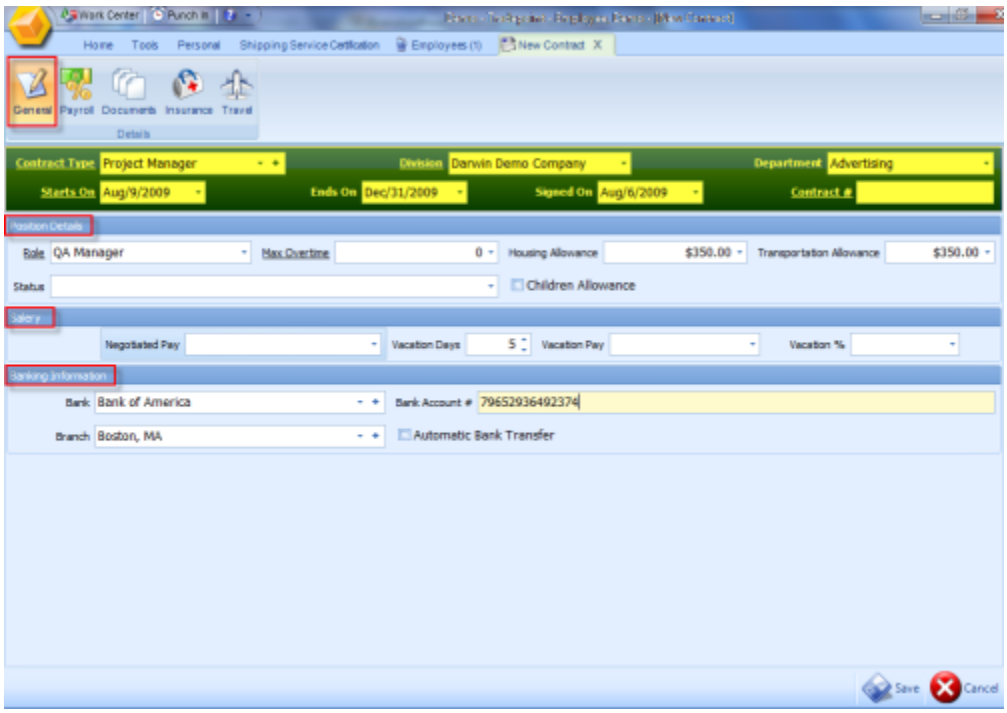
item. For example, for vehicles and existing damage, dents or scratches can be documented as a vehicle goes out to be compared to the condition it is in when it is returned.

Products on loan is also available for all contacts within Tradepoint as long as those items are first applied to an Employee. The rationale for this is there is someone within a company who ultimately keeps track of any samples or items sent to any contacts. In some cases a generic Employee profile is setup where all items are stored especially in the case of library based resources such as books, videos and periodicals that may be lent out to contacts.

Contracts – For Contract based or Temporary Employees

Any company using temporary Employees for seasonal work, or specific projects would find Contract able to support tracking information for Employees.

Contracts will also keep a history if the same person has been a contract Employee repeatedly.



The general information screen of contracts holds most of the primary parameters for a temporary Employee.

Main information including dates of contracts, contract type, division and department are highlighted in the example above.

Contract Type - this is a drop down menu that has to have preferences setup under the Setup & Configure Tool

Division - This field will pull from the Divisions setup under Company Settings.

Department – This field will draw information setup in Company Settings for the Division chosen. So, if different departments are setup for different divisions then the departments will follow the respective division.

Starts On & Ends On – The dates for when the contract is active and the Employee will be working.

Signed On – The date the temporary contract was signed.

Contract # - The number of a contract (if there is one)

Position Details

Role – This field has a drop down menu built in that does have to be setup through the Setup & Configure field first.

Max Overtime – A numerical field for any amount of overtime for this contract (if relevant).

Housing Allowance – Enter in any housing allowance for the term of the contract.

Transportation Allowance – Enter in any transportation allowance for the span of the contract.

Banking Information

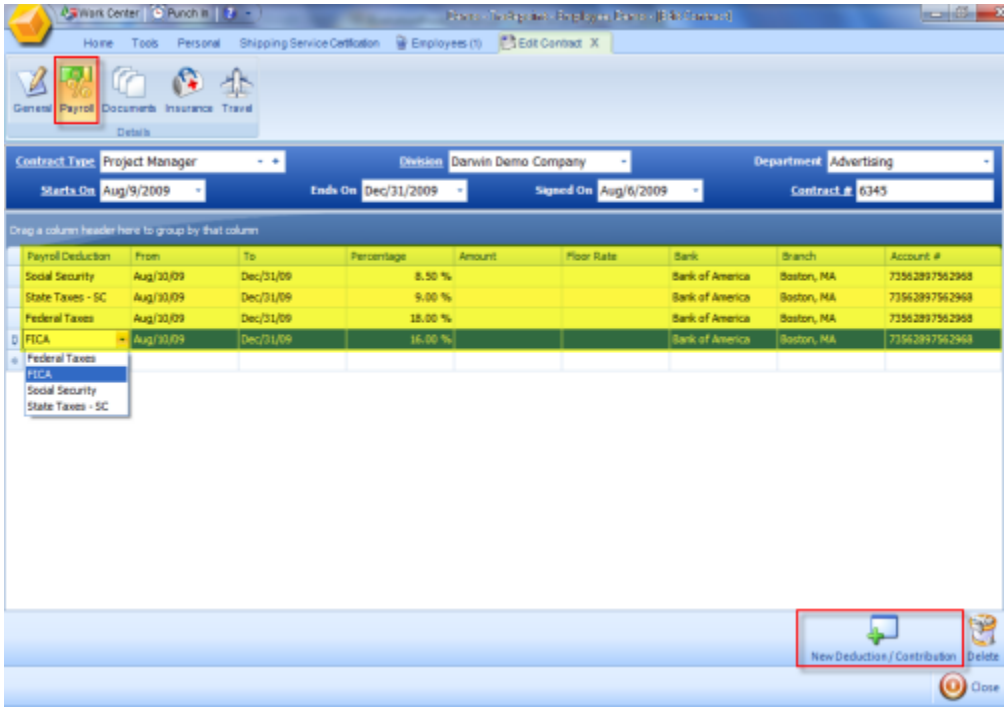
Bank – A drop down menu customizable through the Setup & Configure field.

Branch – A drop down field also customizable through the Setup & Configure Tool.

Bank Account Number – Any bank account numbers for payment to Contract Employee.

The last option is a check box if this contract Employee is paid electronically.

Payroll information is the next screen in Contracts. This is designed as an integrated part of Tradepoint's payroll so if the payroll system is being used then the settings here will be pulled into payroll each time payroll is processed.



The header information will follow through to payroll. The details of multiple deductions are supported in the payroll section so additional deductions can be added to standard ones. This example shows a US based payroll example (payroll deductions shown here are not necessarily accurate since tax rates vary based on location and job being performed).

Payroll Deductions shown here draw from existing payroll information established in Tradepoint (accessed through the Payroll options setup under Company Settings).

The date ranges and deductible amounts are date and numerical fields respectively.

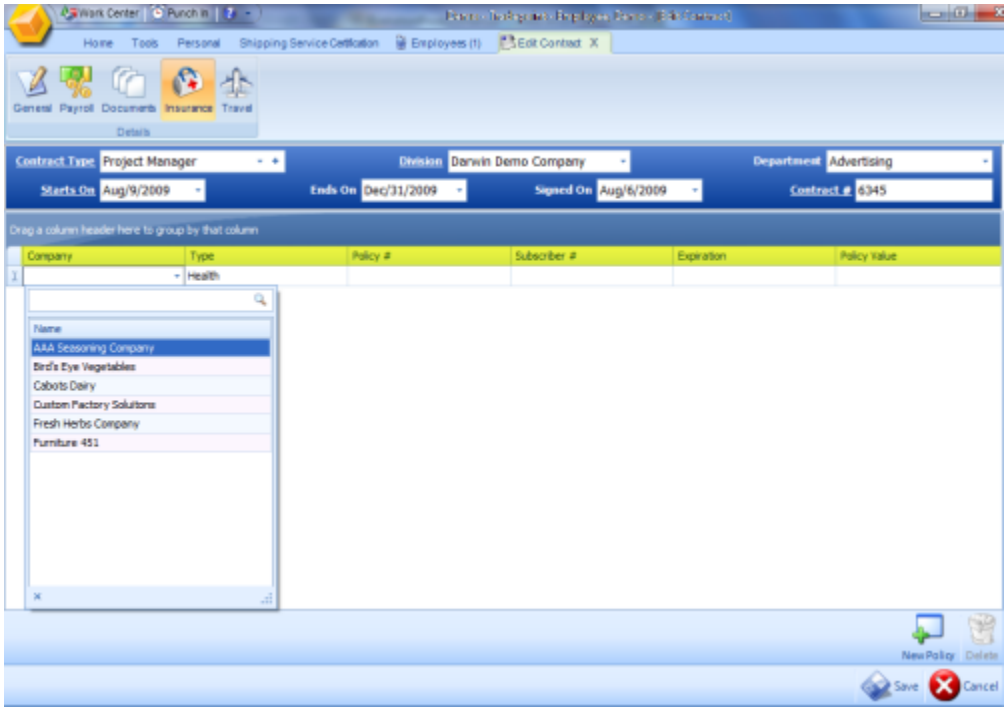
The Bank and branch fields draw information that has been setup in the Setup & Configure tool for Banks and related branch information.

The Account number is an open field to enter or copy/paste a bank account number.

The documents icon allows documents to be:

- Created based on existing templates in Tradepoint.
- Uploaded from an external source.
- Scanned in from an external source.

Insurance information can also be tracker per contract, if its relevant and will be provided to the Employee under contract.



Company – Refers to the Company providing the insurance and will pull information under Suppliers

Type – Is a drop down menu that can be setup under the Setup & Configure Tool referring to the Type of Insurance being provided.

Policy # – An open field for any policy numbers related to the Insurance being provided for an Employee.

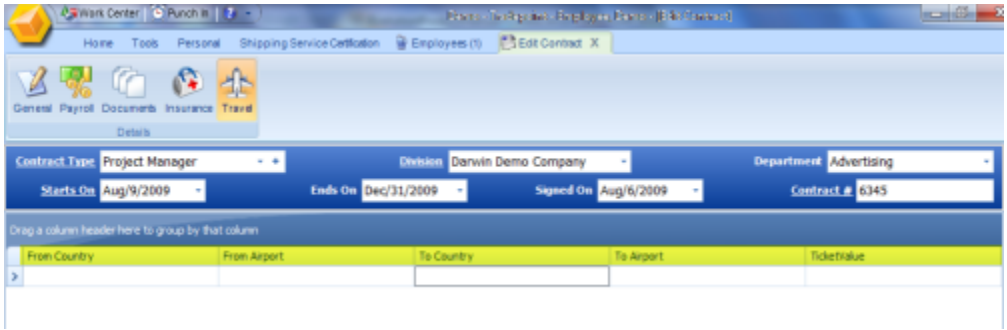
Subscriber # - An open field referring to any relevant Subscriber numbers related to any policies for a contract Employee.

Expiration – An open field for any expiration date for any insurance policy being provided for an Employee.

Policy Value – An open field for entering any policy value.

Travel information can also be held within contracts. All of the fields shown below are open fields to enter in relevant travel information for any contract Employees.

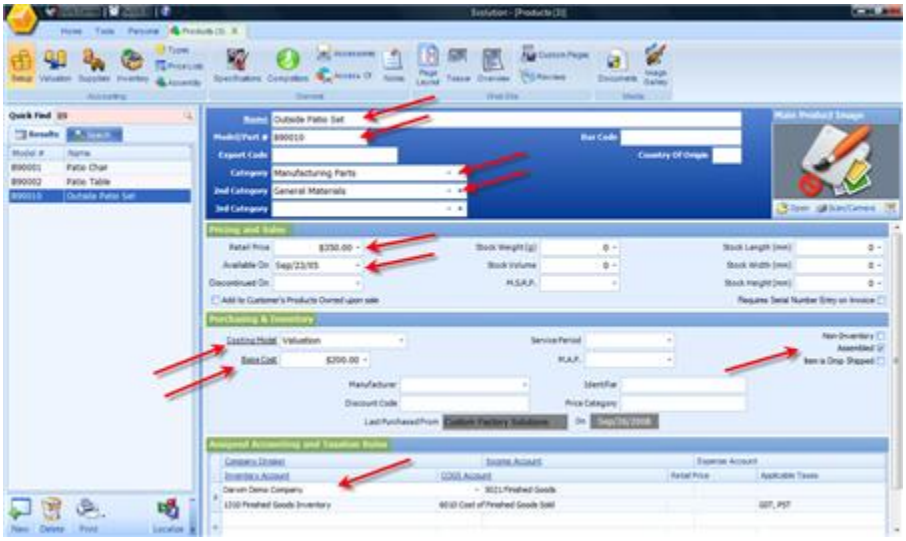
1. From Country
2. From Airport
3. To Country
4. To Airport
5. Ticket Value



PRODUCT SETUP

SINGLE PRODUCT SETUP

Setting up a single Product (that will not be visible on the website) for the first time involves entering some basic data about the Product.



The fields highlighted are the fields you will need to fill in as basic setup for a single product. They are also listed below:

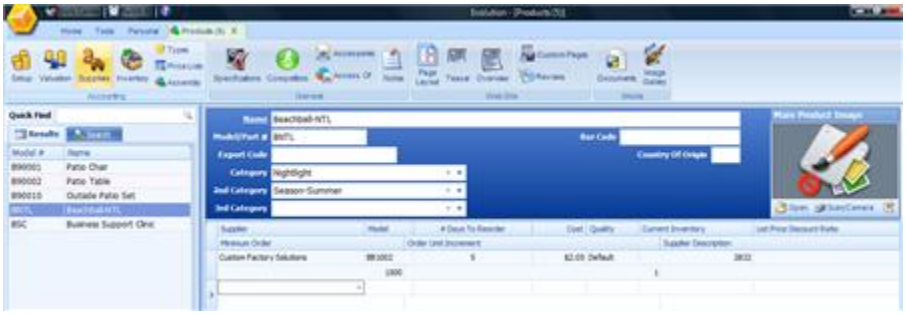
- Name – This is the Product name that can also include a description up to 350 characters.
- Model/Part # - Any Model or Part Number you assign a Product needs to be entered here. This can be any alpha-numeric combination you assign to a Product.
- Category – Choose at least one Product Category. The Blue Plus icon will allow you to set up Categories on the fly as you need them.
- 2nd Category – This is optional but will be in relation to the first Category you set up. The blue Plus icon will allow you to set up 2nd Categories in relation to the main Category as you need to.
- Retail Price – This is the price you sell your Product/Service to you customers for. (This can be edited as needed within each Order or Invoice generated.

- Available On – This will default to the date you create the Product but can also be set to be available at a later date using the calendar embedded in this field. The arrow in the far right of the field will open the calendar.
- Costing Model – Three options are available in this field.
  1. Valuation – This is the model that most businesses use that will allow you to factor other costs into the base cost of your Product.
  2. Average – Allows you to manage varying costs when purchasing Products.
  3. Per Purchase Order – This is for Products whose purchase price can vary each time it is bought and will allow a Products cost to vary on each Purchase Order.
- Base Cost – This is the base cost that you pay for the Product before it is available to your customers.
- Product Preferences – Check off the relevant boxes for a Product's preferences. (Non-Inventoried, Assembled, or Item is Drop Shipped) Each of these items will enable different options that will be active during the Ordering process. For example, the 'Item is Drop Shipped' option will enable an automatic tool to create a PO when an Order is set to 'In Production' and Saved.
- Assigned Accounting and Taxation Rules – These will pre-populate for each product if they have been setup within your Company Settings. If not you can choose each default account that will then follow the activity with a Product.

For your valuations if you choose the valuation model you will need to create at least one valuation for that product (even if the values set are all zero). A valuation is typically an additional cost that would not otherwise be accounted for within the cost of a product.

Some examples of valuations include:

- Additional shipping costs (especially overseas freight)
- Additional Handling fees per Product
- Printing costs per product
- Packaging costs



Clicking the Start Date field will create a valuation with a zero value. This will allow full Product functionality even if you don't have any additional costs for your Products.

<u>Please Note:</u> If your Products are not Inventoried items, or they are services, or drop shipped you will not need to have any Valuations. Once the check box for those preferences is checked off then you will NOT be prompted to create a valuation.

For the valuation option of 'Per Purchase Order' and 'Average' the valuation option is NOT required.

Discontinued Products

Price Lists

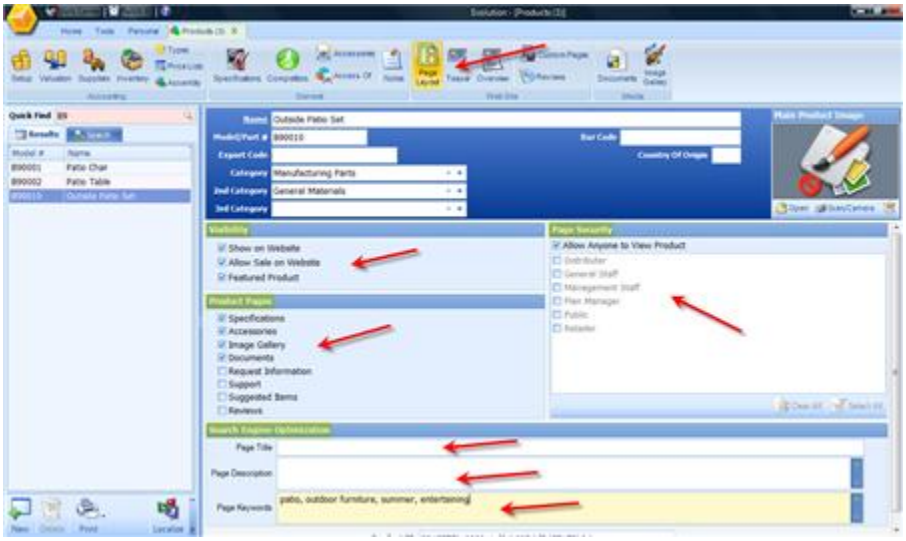
Product Matrices

Quantity Price Breaks

Product Setup for Ecommerce

To setup your website listings for your Products the additional steps outlined will also need to be followed in addition to the basic product setup outlined above.

After your Costing Model, and Valuations and at least one Accounting Rule is setup you can list the Product on your website with specified preferences on the 'Page Layout' screen.



Once these Preferences for your Product Listing have been enabled here the Product will appear on your website within a few minutes as Tradepoint synchronizes to your website.

The page layout screen shows numerous options that can be enabled at the time a Product is set up or one at a time as you bring on new Products.

Product Visibility Options include:

- Show on Website – Click this to make your Product visible on your website

- Allow Sale on Website – This option will enable the shopping cart and 'Add to Cart Option allowing the sale of your products on your website.
- Featured Product – This option will make your Product a Featured product on the main page of your website. It will appear with the guidelines established by your Cascading Style Sheets (CSS) in your website design.

Product Page Security Options include:

- Allow Anyone to View your Product – This option will have a Product listing be visible to everyone who visits your website.
- Any other security profiles you have set up will also be options if you do NOT want anyone to view the Product on the website. This option is used often in cases where there are products available for wholesale (as an example) or are only meant for specific types of customers.

Product Page Options include:

- Specifications – Enable the Specification you have set up to be visible for each Product on the web. This is ideal for electronics or Products that have details relevant to their purchase.
- Accessories – This option will enable the up-selling tools within Accessories. If you have any items enabled in this section then they will be activated within your Product listing with the option to purchase the Accessory when this item is checked off.
- Image Gallery – For Products with multiple images in addition to the Main Product Image they will be enabled when this options is checked off. Images may need to be sized to the desired size (i.e. thumbnail size 125 X 225 pixels) to appear correctly on your website
- Documents – If you would like your viewers to be able to download resources from your Product listings then check off this option.
- Request Information – This feature enables the email message option on your website for information about a specific Product.
- Support – This feature enables the ability to email you for Support on a particular Product directly from the Product listing on the web.
- Related Items – This option will enable the up-selling tool for Related Items on your website. Any Products you have enabled within the 'Accessories Of' section will be visible with the option to purchase Related Items directly from the product listing.
- Reviews – Enable the Product Review section for any given Product by checking off this option.

Search Engine Optimization:

- Page Title – Enter in the Page Title to be a part of the searchable tags within each product page.
- Page Description – Any Page Description you want to be on your product Pages enter that information here. It will automatically be a part of the meta tags on your Product Pages.
- Page Keywords – Enter in your keywords for each Product Page. Each Product Page is its own web page so each product page can have its own keywords that are unique to each Product.

Note: *Once these options are checked off you will have to have content in each of the respective sections for the Product to have a complete listing on your website. Most content for your Product listings can be imported in using the Data Import Tool and others can be specified by each section.*

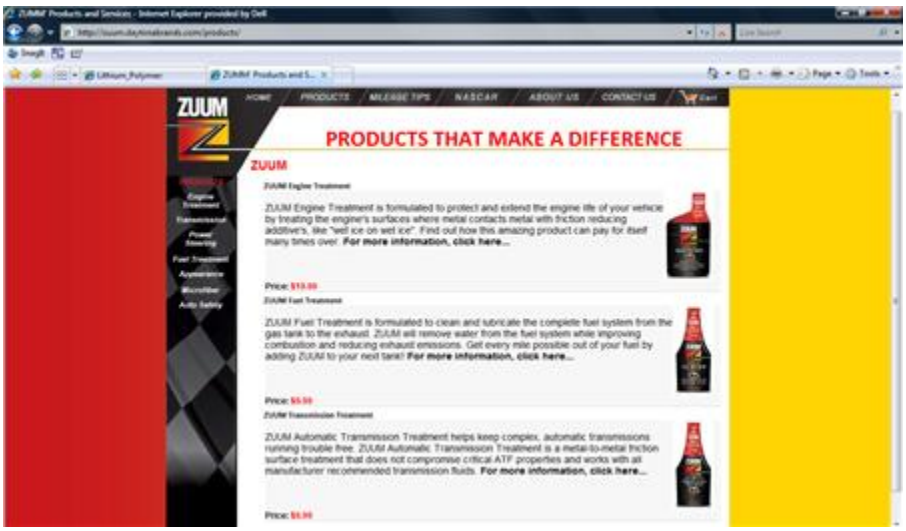
Teaser

The Teaser is often a short description of a Product that is linked to a page with the Over view or longer description. Teaser pages often will be linked to the Overview Page.

This example shows content in the Teaser section for a Product listing.

Please remember that internally the Teaser function and the Overview function will look the same within Tradepoint but will appear differently on your website.

The example below is a good example of the Teaser Page function.



Each of these short descriptions link into a Page with the longer descriptions and other tool enabled.

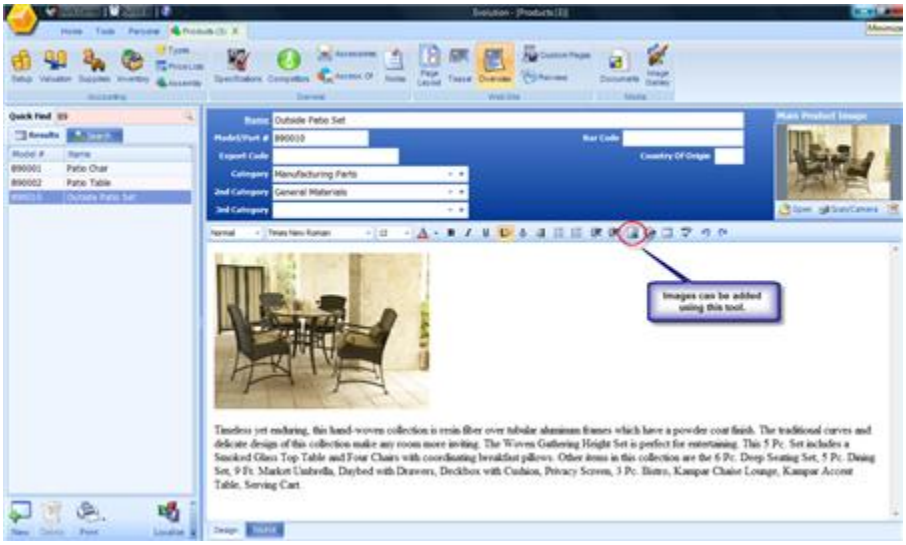
Overview

The Over view section of Tradepoint appears very much the same as the Teaser section however your CSS for Product Listings will determine the layout and appearance of your Product Listings on your website.

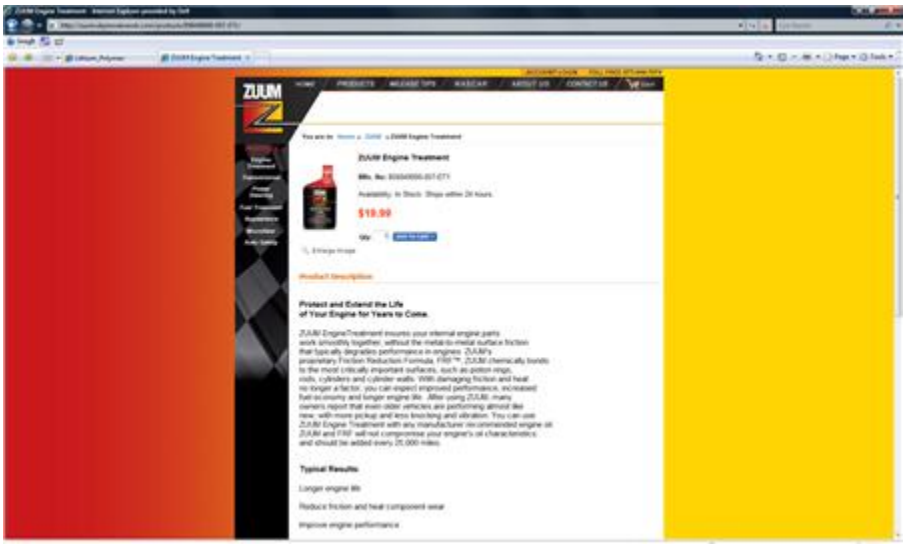
The top section of the content editor in both the Teaser and the Overview contains a tool bar for graphic elements. This will allow you to format the text as well as add images to your Product listings in just a few clicks.

The ability to add images to Teasers and Overviews and hyperlinks is also contained in this tool bar.

An example of an Overview with content is shown below.



Once this information is on the web it will be arranged base on your [references through the CSS in your website. Below is an example of a product Overview.

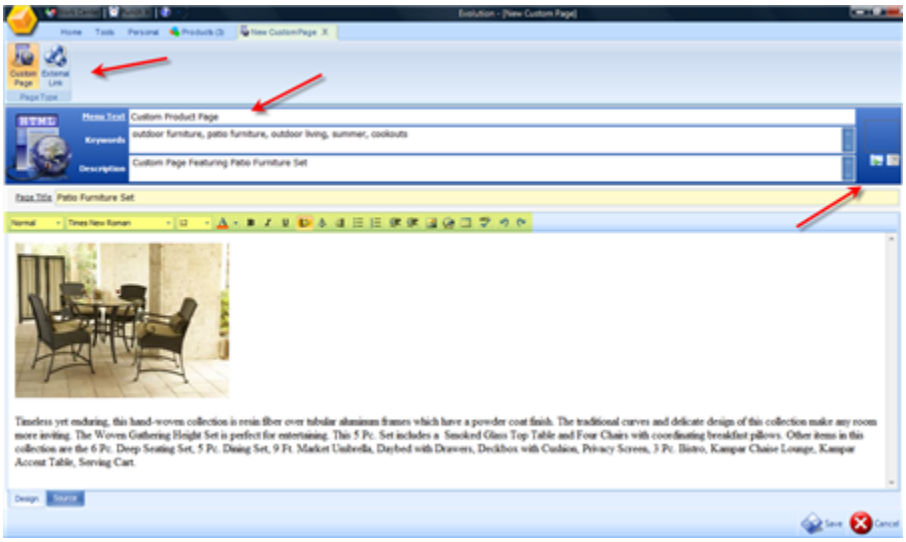


Any content and images that are edited through Tradepoint will also be posted on your website as soon as Tradepoint synchronizes.

Custom Pages:

The Custom Pages tool within Tradepoint will allow you to create an additional page of content for any of your Products right from Tradepoint.

Fill in the information on the screen and add your content. It can be the same or similar to your Product Pages (as shown in the example below or very different). This is an ideal tool to be able to show additional content for your products and still have the ability to purchase the products, essentially giving you additional exposure on the web for your Products.



Information to fill in includes:

- Menu Text
- Keywords – Keywords that will generate search results. These will be added to the tags on your custom page automatically.
- Page Description
- Page Title
- Main Image – Add a main Image with the tool in the upper right of the screen.
- External Link

Save your changes and the custom page will be listed as a part of your product listing.

Product Images

Product Images consist of a main product image and an image gallery for multiple images.

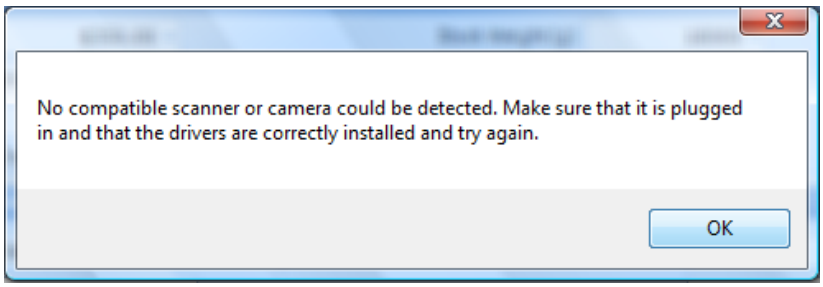
The main image in a product listing will be the default image in a product listing on a web site, while the image gallery can hold an unlimited number of images and the size and how they scale within your product listings are determined by the CSS in your Master pages.

A product main image is always visible in a product listing in the upper right corner and can be scanned or uploaded from the Main Product page with the tools highlighted in the image below.

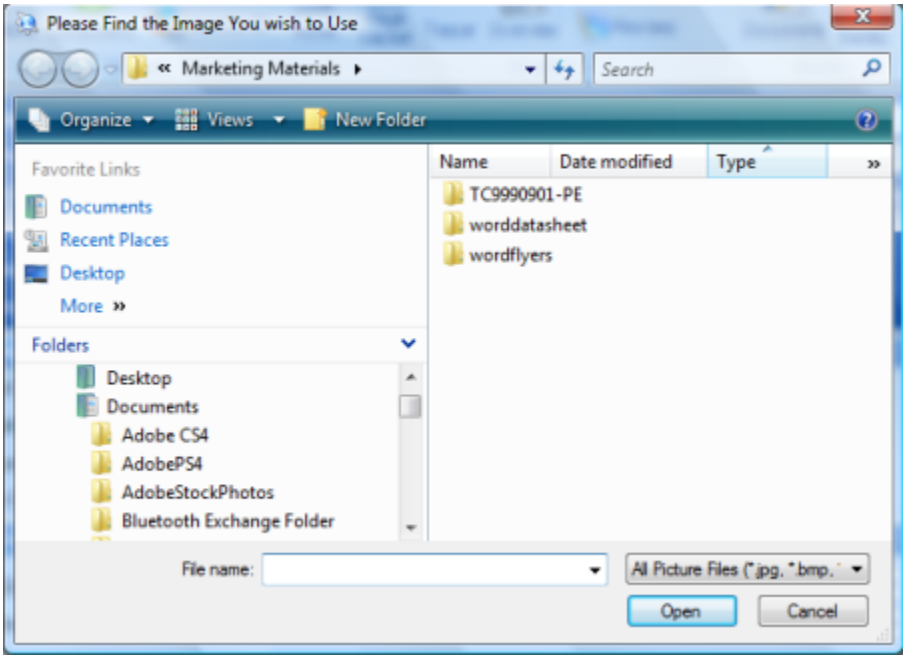
Hovering over highlighted options brings up live Help tips and explanations.

Image scanning options will search for any devices attached to the computer in use at the time.

No scanning device or if there are no drivers installed for a scanning device will result in a message shown to that effect.



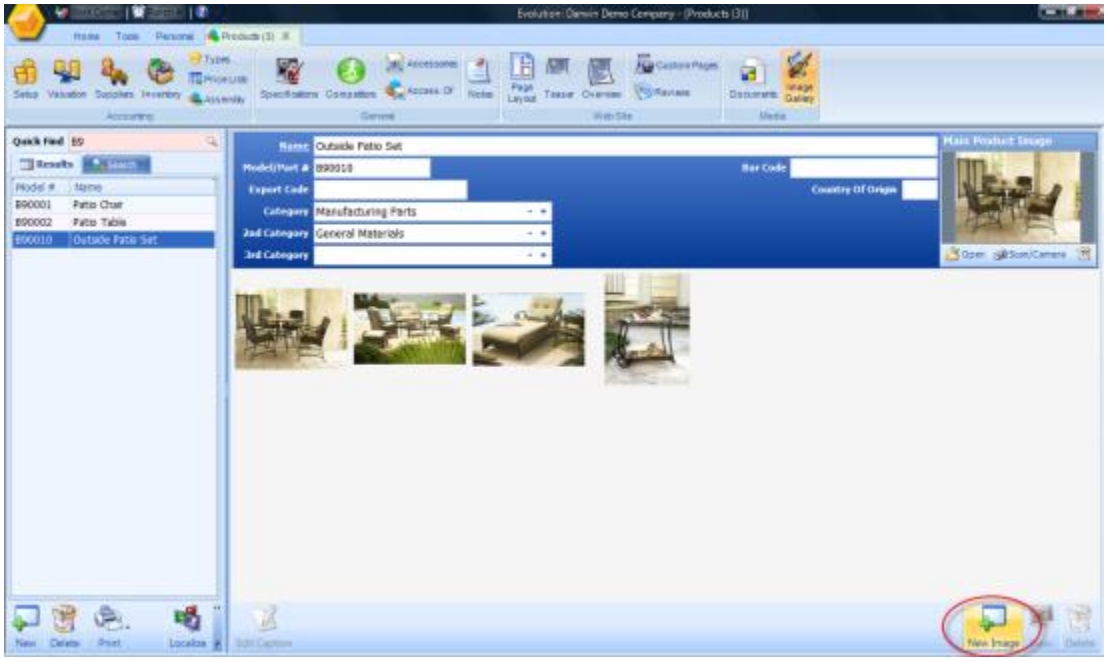
Uploading options will open options to search for and upload an image directly from the computer.



The recommended size ranges for Main Product Images is between 150 X 225 and 200 X 325 pixels. The CSS in the Master pages of your website will automatically scale the Main Image in your product listings on the web.

The image gallery supports an unlimited amount of images per product.

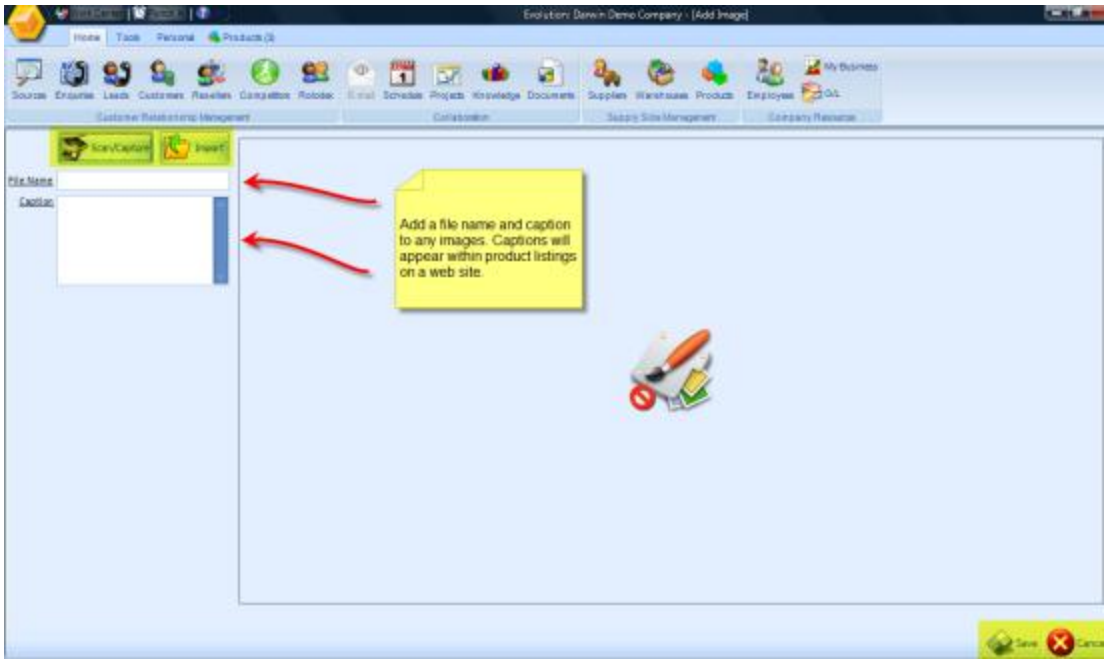
Multiple Images will appear as you see below in the Image Gallery of a product listing.



Images rotate on a web site based on the type of rotator that is embedded into the Master Pages of a web site. This means the maintenance of a website deals directly with Tradepoint's interface for uploading and scanning in new images rather than using a separate interface.

One click on any existing images activates the option to drill down or delete an image using the icon options in the lower right of the screen.

The New Image options open the following screen below to add new images.



Data import tools exist to import product images en masse with web addresses as links to avoid having to add Images one by one.

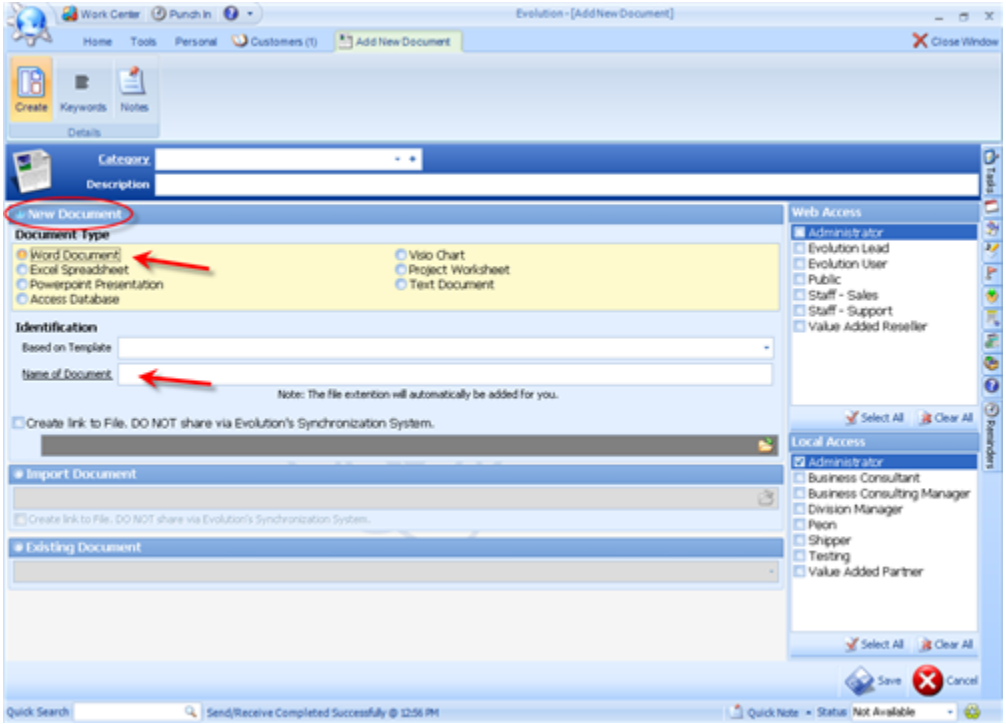
Documents – For Downloadable Resources in Product Listings

Creating A New Document in Tradepoint

Tradepoint is interfaced with Microsoft Office which means when you create a document within Tradepoint, the version of Microsoft Office you have on your computer will be opened and then will automatically be attached to the file within Tradepoint that you generated a New Document under when you save your changes within Tradepoint.

Tradepoint does not create documents in different file types. Tradepoint does look for the desktop application corresponding to the type of document you are looking to create and subsequently saves any resulting documents created within Tradepoint.

Creating a new document is done by checking the New Document circle and then specifying the type of document just below.



Specify and Security Settings for the Web or Internal use and name the document. From there Save your changes and the version of Microsoft Office you have on your computer will open for you to create your document.

When you save your changes the document will automatically be added to the file where you created the document within Tradepoint.

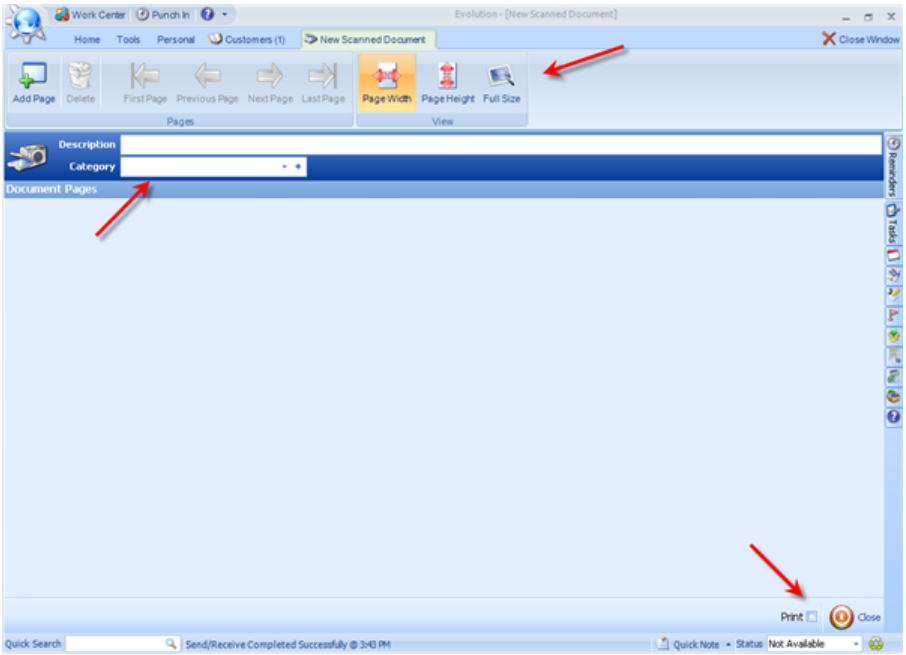
Scanning in a Document

Scanning in a document is done through the New Scanned Document icon from the Documents screen. 

This will open the wizard where you can scan in a document through the drivers of the scanning device attached to your computer. Tradepoint will automatically look for any device attached to your computer.

The wizard to Scan in a Document will look for any device attached to your computer.

Below is a view of the window where you will be able to scan in a document.

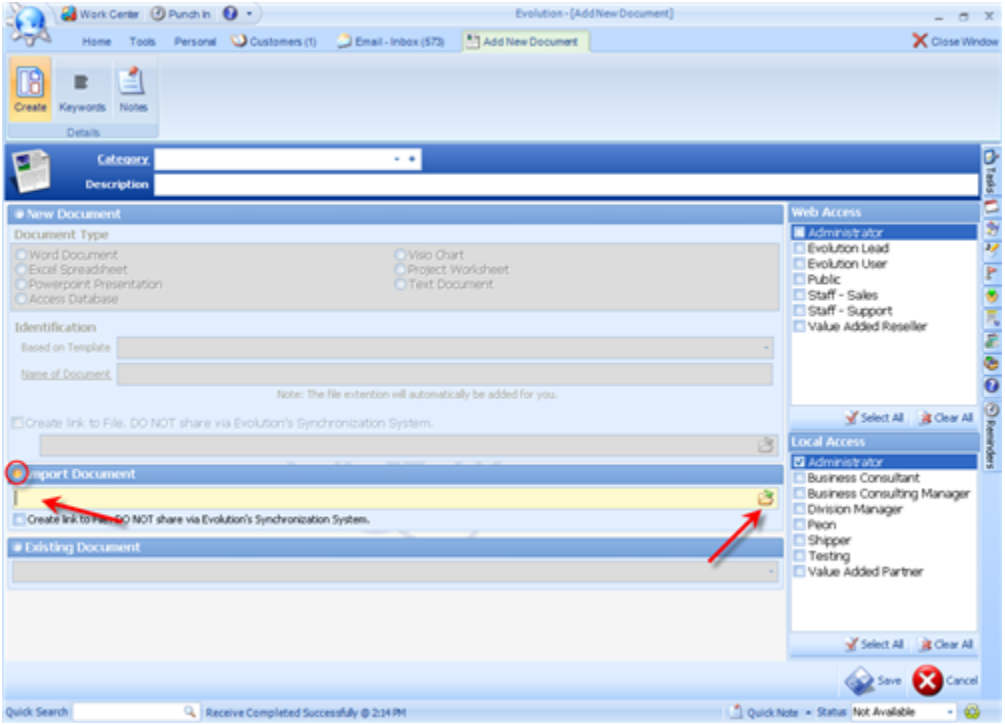


Scanning functionality is in the toolbar at the top of the page. A Document description and Category can be set towards the top of the page. When you have scanned in your document you will be prompted to Save it at the bottom of the page. You also have the option to Print a scanned document at the bottom of the page.

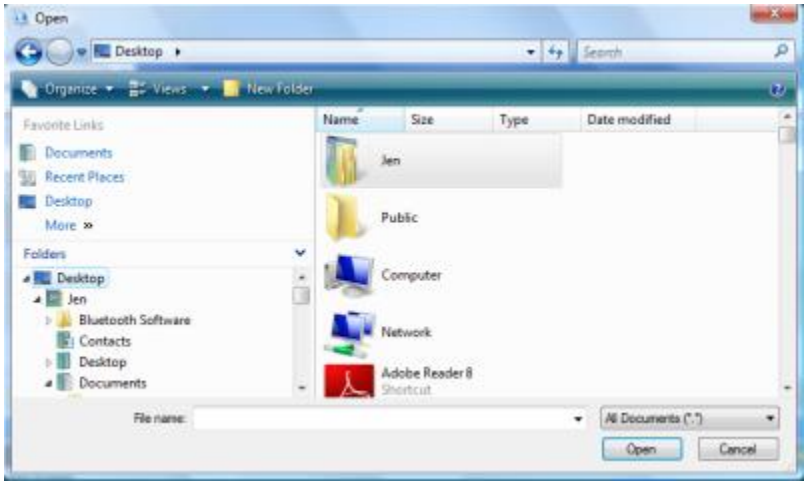
Uploading a Document

One of the most utilized features within Document management in Tradepoint is importing or upload an existing document from your hard drive or other location into Tradepoint to be attached to a contact's file.

Click on the 'Import a File' icon and then click on the file to the right of the field and search for the location of the file on your hard drive or device attached to your computer.



Tradepoint will redirect you to the search window to look for that document on the computer Tradepoint is installed on.



Choosing a document by double clicking on it from the search window will upload/import the document into Tradepoint.

Once a document is uploaded into Tradepoint any person accessing that document will have complete document revision control within Tradepoint of any changes made to a document.

As with other document functions set any Security Settings and Save your changes. The document you have chosen to Import will then be listed in the Categories of Documents on the main page within your contact file.

Knowledge Base

Tradepoint includes a knowledge base tool designed with flexibility in mind. The KB in Tradepoint can be used internally as well as create articles which can be posted to a website and be available publicly through a website.

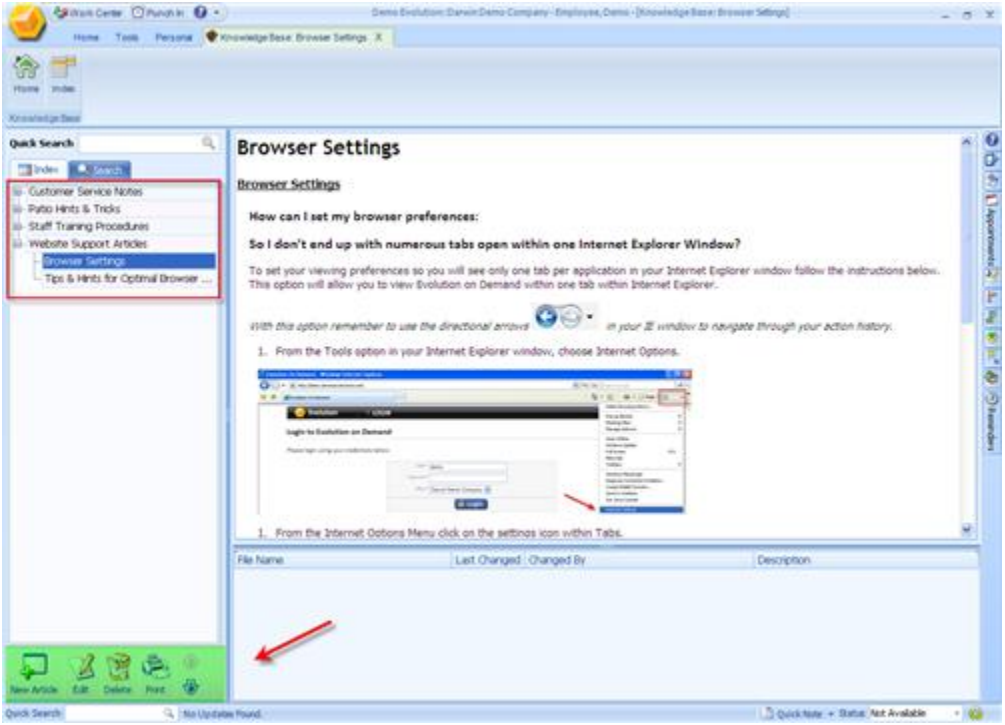
Article creation supports text as well as HTML graphics for the ability to setup articles with the look and feel reflective of your organization through the web.

The Knowledge Base in Tradepoint is fully SEO supported with tools to embed links into related articles and products automatically within each KB article.

Creating Knowledge Base Articles

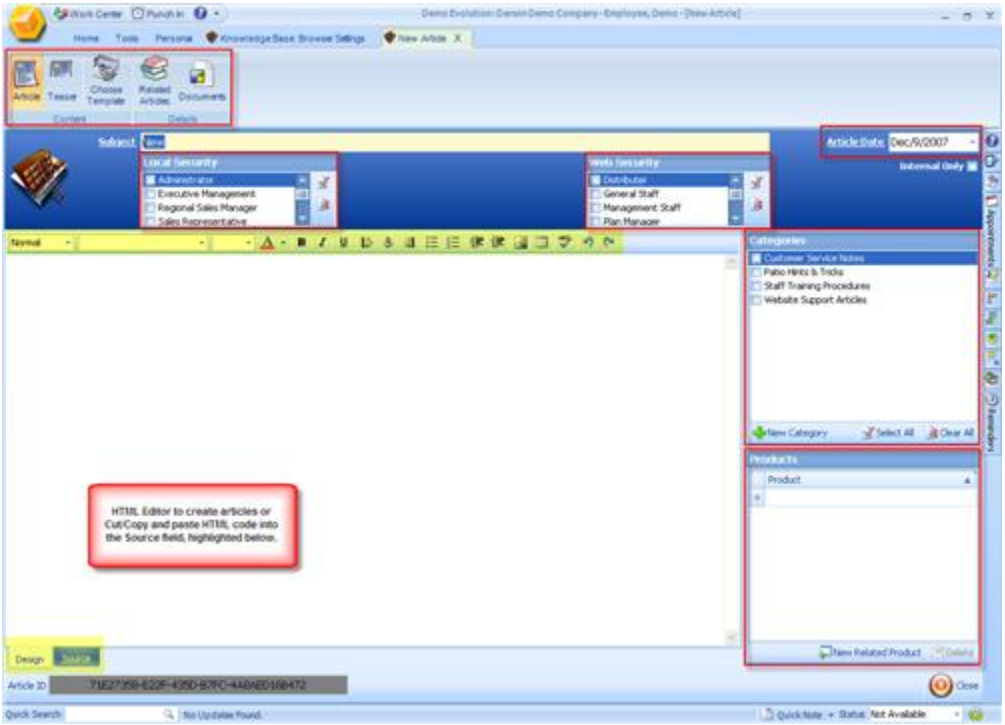
To create a new article within the Knowledge Base follow the following steps.

From the Home tab click on the knowledge icon. The next screen you will see will be the main menu within your knowledge base.



1. On the left side of the main screen you will see any existing Categories of Articles. (Categories can be added within a new article when none are present)
2. Highlight any existing article to view it on the right side as shown in the image above. (For new articles click the 'New Article' icon in the lower left)
3. Expandable menus will hold any articles under any of the main Categories. (No menus will be present when creating new articles)
4. Icons in the lower left of the screen will allow you to create a New Article, Edit, Delete or Print any existing articles.

Use the 'New Article' icon to create a new article. The main screen you will see is shown below. Screen elements are highlighted in the example below.



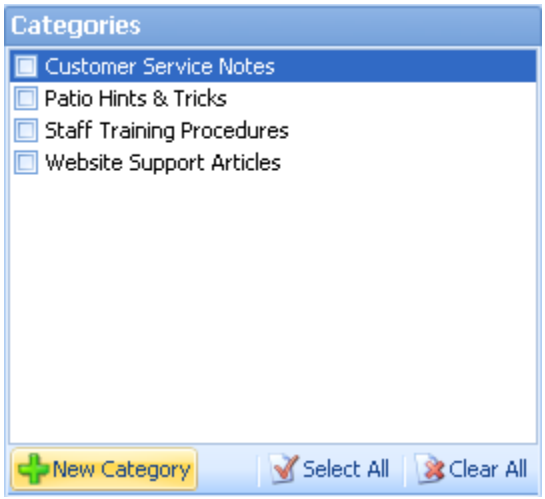
Highlighted tools include:

1. Tool bar at the top of the page for the New Article, Teaser page, tool to choose an Article Template, add related articles to one you are building and add Documents to any article you create.
2. Calendar for the date your article is created. Edit the date to show a different date posted in your article
3. Local Security Settings - Determine which User Access profiles within your organizations have access to this article. Check off which profiles for each article created.
4. Web Security Settings - Determine which user profiles through your web portal have access to any articles. Articles can be public or for specific partner or client profiles.
5. Categories - Create additional Categories by using the green plus button here. Assign an article to one or more articles by checking off one or more Categories for each article.
6. Products - Assign products to an article. For example, for a basic instructional guide you can assign Products to it so viewers know which Product is associated with this article. This can be used as an up-selling tool for educational articles.
7. Design and Source Tabs - Use the design tab to create your article using the tools in the tool bar highlighted at the top of the open field. Use the Source tab to Cut/Copy paste HTML from another source directly into the KB to create your article.

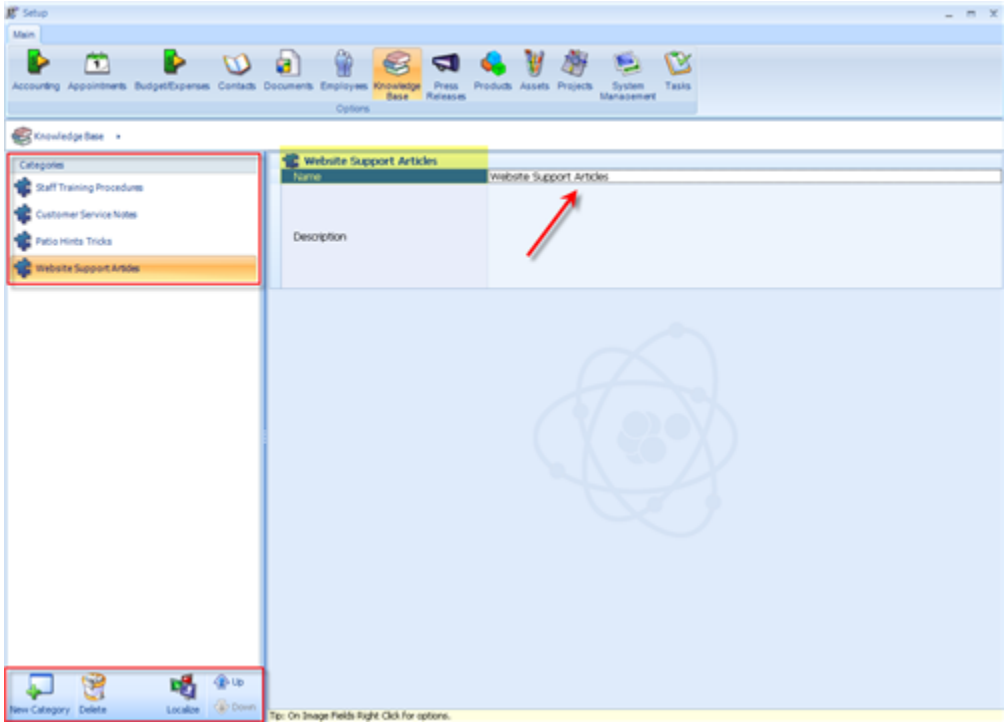
Creating Categories in the Knowledge base

To create the categories for your knowledge base articles follow these steps.

From the main window of a KB article click on the green plus in the Categories section.



The next screen that will open will be where you setup your knowledge base article Categories.

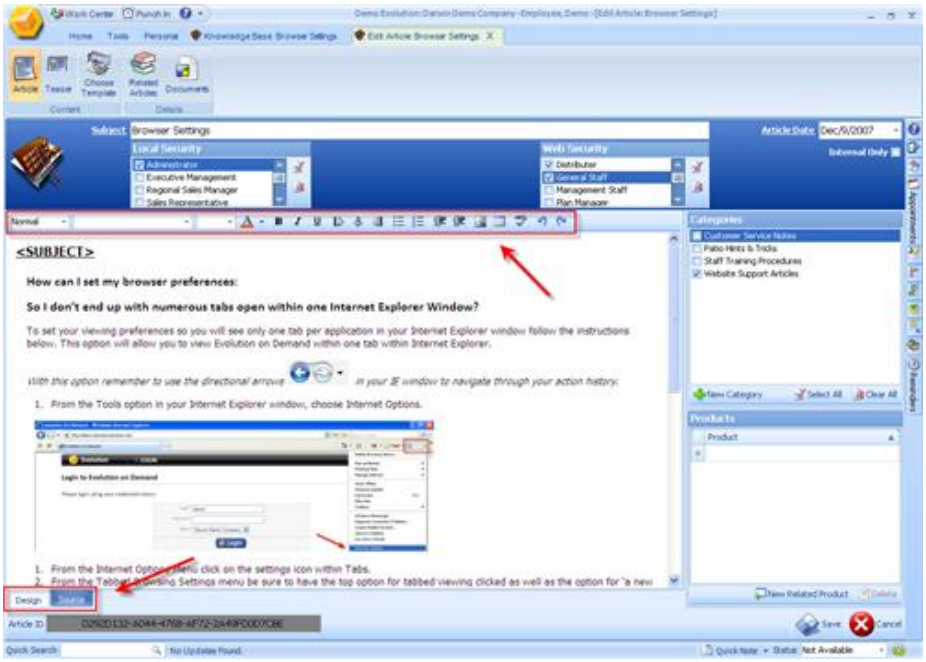


- The new Category icon in the lower left will open a screen similar to the one you see on the right.
- Type in the name of the New Category in the field next to the highlighted title.
- Your category will automatically be saved when you close the window by clicking the 'x' in the upper left corner.
- Your Categories need to have at least one article assigned to it before it will show in the main menu of your Knowledge Base.
- Categories with articles listed will automatically show on your Support (or similarly labeled) page on your website when you make them public.

ARTICLE CONTENT

Article content can be either generated directly within the Design window of the main window in the knowledge base or HTML code can be Cut/Copy and pasted from another source directly into the Source window to pre-populate the design screen of your knowledge base article.

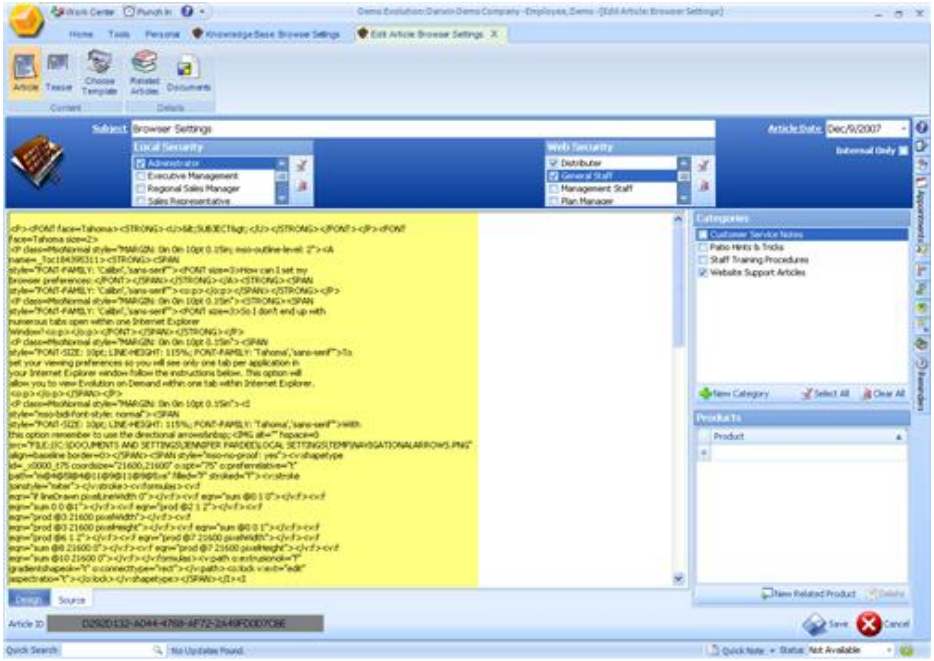
***Please Note**: For people copy/pasting from Word or another word processing program we recommend using Notepad to copy into and paste out of before content is pasted into Tradepoint's KB. Desktop Word applications often have additional formatting in them which can interfere with your preferences within the HTML Editor within Tradepoint.*



The example you see shows content that was developed through the design screen of the new article window. Editing tools are highlighted in the tool bar above.

Clicking the Source tab below shows the HTML code that is generated through the editor simultaneously to content being directly added within the Design screen in the knowledge base.

The Source tab allows you to edit your HTML Source code directly in addition to developing your content through the Design screen.

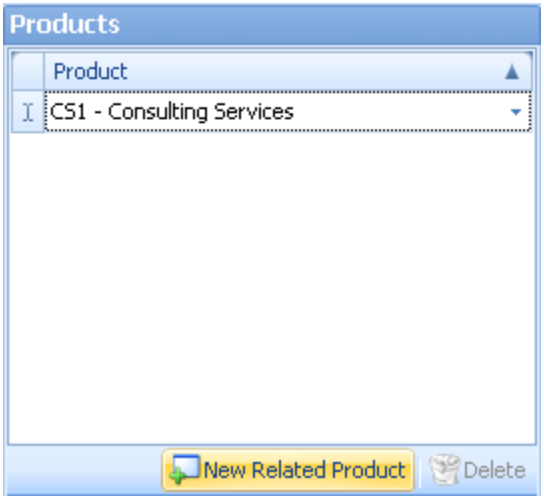


Whether you develop your content directly through the Design screen on the design tab or use the source tab you have a full range of tools available to create knowledge base articles with graphic and rich text capability for use internally and externally within your organization.

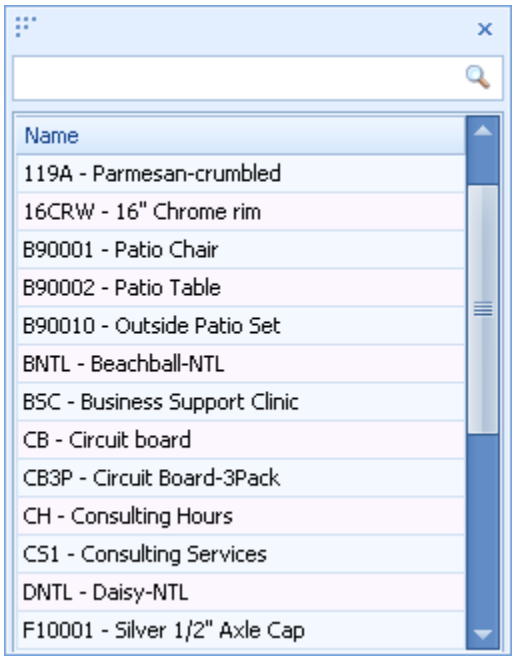
Product Links in Knowledge Base Articles

Use the Products tool to create a product link to link any products and services with any knowledge base articles. For companies using the web modules this is a great up-selling tool which will create a hyper link on the knowledge base article taking the viewer directly to the web listing for any products and services that have been linked to the article.

1. From the main knowledge base article window click on the 'New Related Product' icon in the Products section in the lower right of the main screen.



A menu will open allowing you to search for and choose a product or Service to associate with this article.



Search for a product through the scroll bar or type in all or part of a Product name.

Add multiple products to a knowledge base article if you like. All products linked to a Knowledge Base article will show up on the article page as a link.

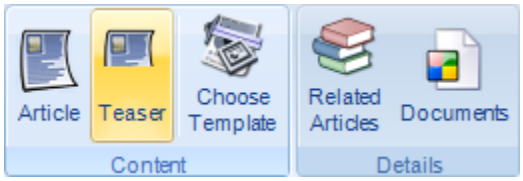
This is a great way to redirect traffic to your Product listings through specific articles.

Creating Teaser Pages

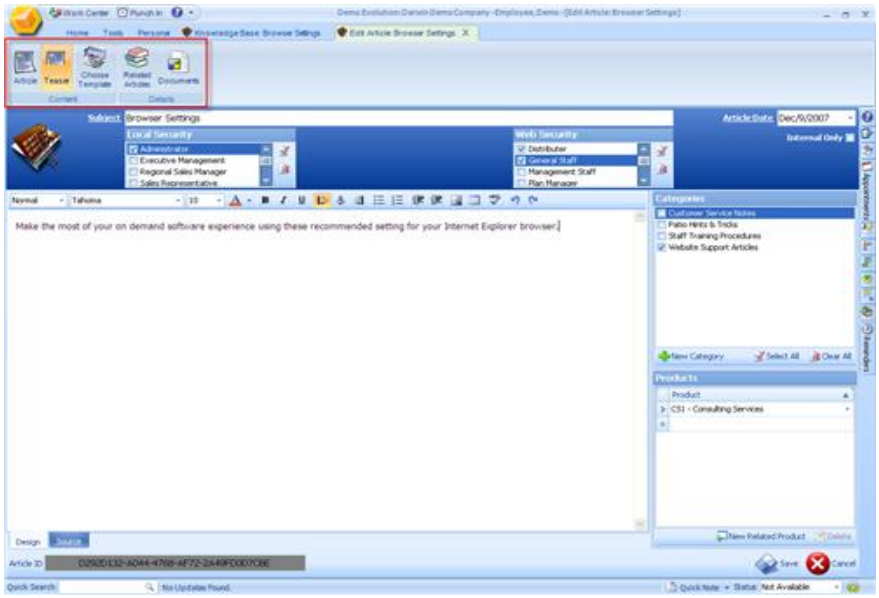
Teaser pages are available for the knowledge base for people using one of the Ecommerce solutions available. Teaser pages are linked to your articles and will be viewed as the Header within your website's Knowledge Base section.

Use them as a descriptive tool for the article you are creating. Teaser pages are also a great tool to optimize keyword usage for websites that have been key word indexed for optimal search engine performance.

The teaser page can be accessed from the tool bar at the top of the main knowledge base article window.



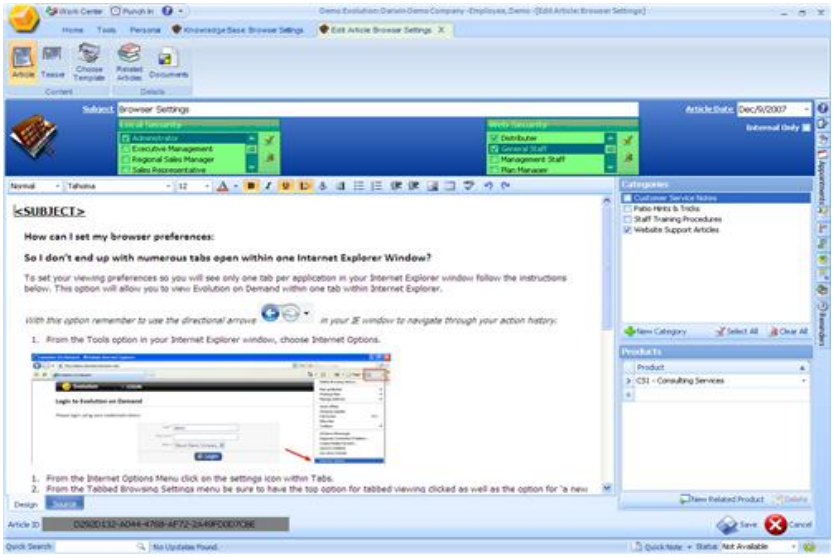
The Teaser window will look identical and have the same tools available to you for your teaser pages as the main article.



- For each article you generate you will need to create a brief Teaser page.
- Save your changes when you are done.
- For companies using our Ecommerce solutions these will appear automatically as Tradepoint synchronizes with your web servers and updates your website.

Managing Security Access

Security Settings for knowledge base articles apply to employees within your organization and viewers of your website are available with the two sections towards the top of the page. The image below shows these two examples highlighted.



- Local Security - This will list the security profiles you have created within Tradepoint for your staff. Check off the ones you wish to have access directly from Tradepoint.

- Web Security - This will list the profiles you have for your contacts (Leads, Customers, Resellers, Suppliers, etc.). Check off any profiles you want for various contacts to have access to this article through your website.

- Internal Only - If you want your article to be available internally within your organization then check off this box.

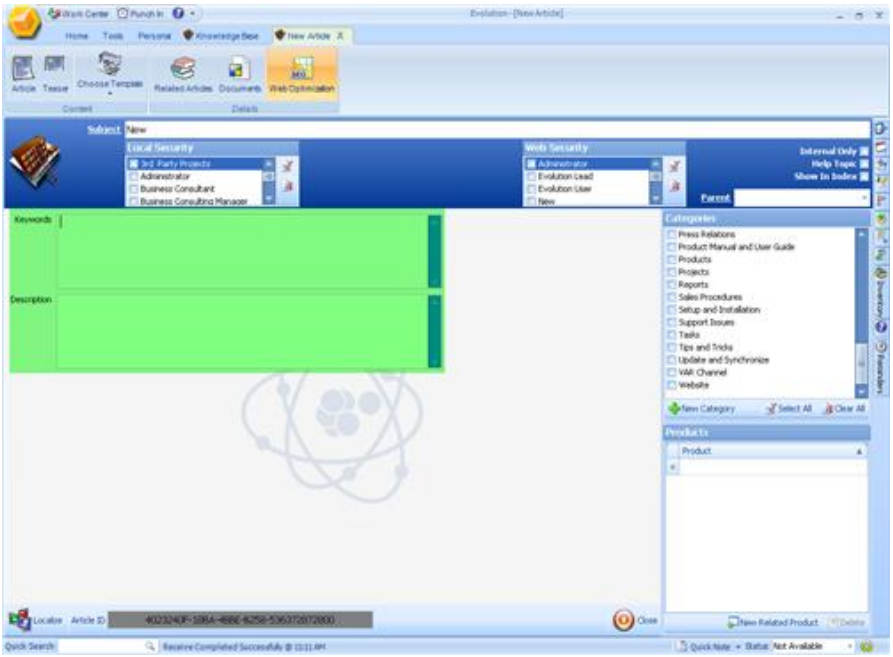
Save your changes when you are finished. When Tradepoint synchronizes, these changes will update to the web and internally.

SEARCH ENGINE OPTIMIZATION TOOLS

For businesses using one of our Ecommerce solutions in conjunction with Tradepoint for windows you have search engine optimization tools for those Knowledge Base articles that you are displaying in your website.

From the Home Tab click on the Knowledge Base icon and from there click on New Article in the lower left corner. In the tool bar in the new article window you will see the icon for Web Optimization.

This window has a section for adding keywords and a description of the page.



Type in or Copy/Paste keywords here in a comma separated format and any description for your Knowledge Base article.

If you are already using one of our Ecommerce Web modules then when you save your changes to the article the keywords will register in the HTML of your web page as keywords which can then be picked up

in the indexing process with the search engines for maximum exposure with the keywords you are already registered with.

TEMPLATES

Tradepoint provides template tools as a tool for efficiency and consistency for items that are used repeatedly within Tradepoint. Documents, Projects, Email templates, Press Release articles and Knowledge Base articles are all supported with templates.

Template tools in Tradepoint include elements to support graphical as well as functional aspects of activities related to content and actions resulting from using a template.

Graphical elements are related to supporting text or HTML content, support for images, hyperlinks and the ability to embed additional content through hyperlinks or through HTML.

Functional elements include the ability to control security settings, and to add other people to events within a template (Projects), add reminders and alerts for scheduled events in a timeline

DOCUMENT TEMPLATES

Creating a document template in Tradepoint is ideal for organizations who need to maintain exact revision controls and keep all document usage within an existing system without introducing documents that have been created outside an existing system.

If you are looking to use Document templates throughout your organization they are created through the Documents icon under Templates, found on the Tools Tab. Once Document templates are created they can be accessed anywhere a document can be added or uploaded.

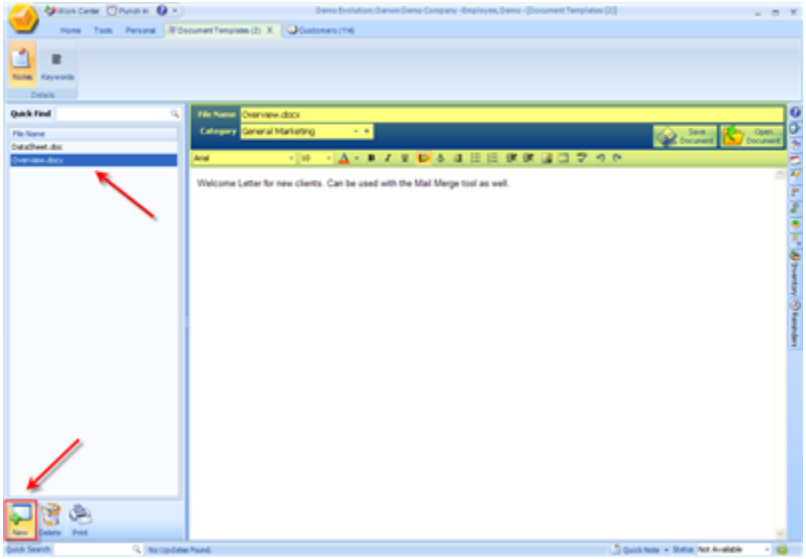
Document Templates can be created within Tradepoint using existing documents that may be adjusted depending on the client and the activity.

Document templates can be used on their own to generate action or contact specific documents such as sales forms, welcome letters, or any questionnaires that are relevant to your sales/service process.

Document templates can also be used in relation to create Mail Merge documents that will them pull in the relevant address and contact name information when you go to create a general mailing.

Below the steps to create a Document Template are illustrated.

From the Home Tab click the Tools Tab and under Templates click the Documents icon. You will come to the screen you see below. If there are no templates in Tradepoint then the screen will appear similar to the example you see below.

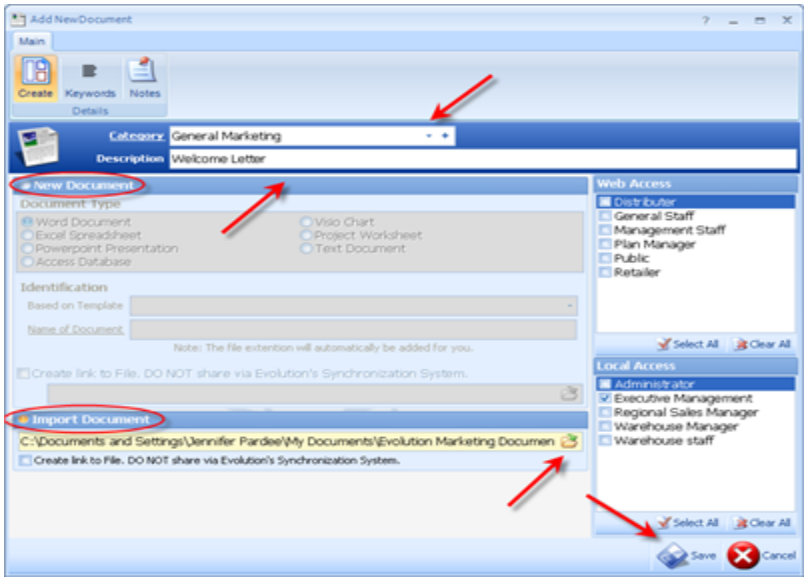


The arrows indicate the 'New' icon for creating a new document template. The arrow at the top of the document is where you will see any existing templates when you click the Search icon at the top of the screen (magnifying glass in the Quick Find tool).

Click the 'New' icon at the bottom of the screen to start a new document template. You will see the following image below where you can specify the following parameters for your document template:

- Whether you want to create a New document through Tradepoint or use and existing one
- If you are creating a new document what type (Tradepoint will open the correct Microsoft Office program to create the right type of document for your template
- The option to store the document through a link or file.
- When your Document template is created it can be used within Documents anywhere you can access document management functionality or within the Mail Merge Tool

The next window you will see the screen view below where you can specify the details for your document template.



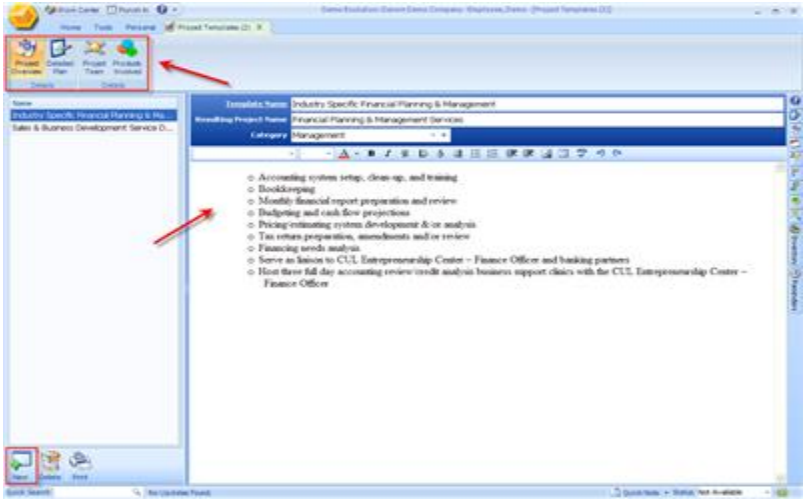
You can chose to create a New Document or use an existing one through the 'Import Tool'. If you use the 'Import Tool' you will be able to search for and specify the document you want to use as the basis of your Document Template.

Set your security settings by checking off the correct profiles for Local Access (people within your company) and for Web Access(clients, partners and suppliers you may be sharing your documents with) then save your changes when you are finished.

PROJECT TEMPLATES

For businesses that use the same or very similar Project structure repeatedly, Project templates is an ideal tool to be able to establish a Project structure in a fraction of the time it would take to build each Project manually.

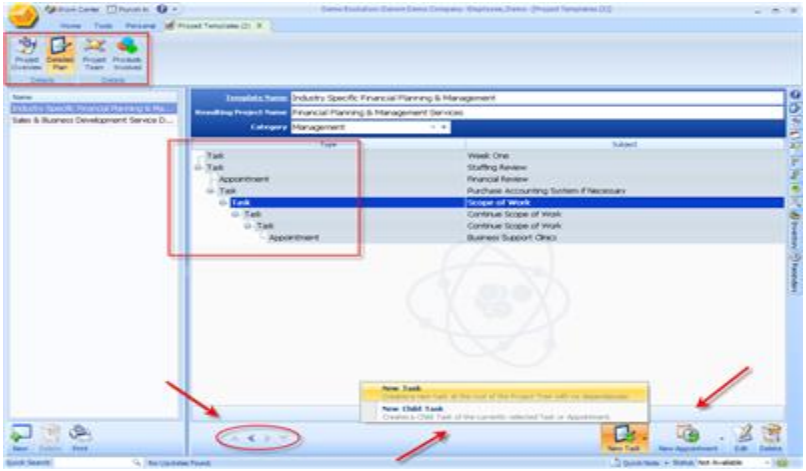
Under the Tools Tab you will see the icons for templates. Clicking on the Projects template icon will take you to the screen you see below where you can build the structure for your Project Template.



The icons in the upper left corner are the parts of the Project you can establish within your Template:

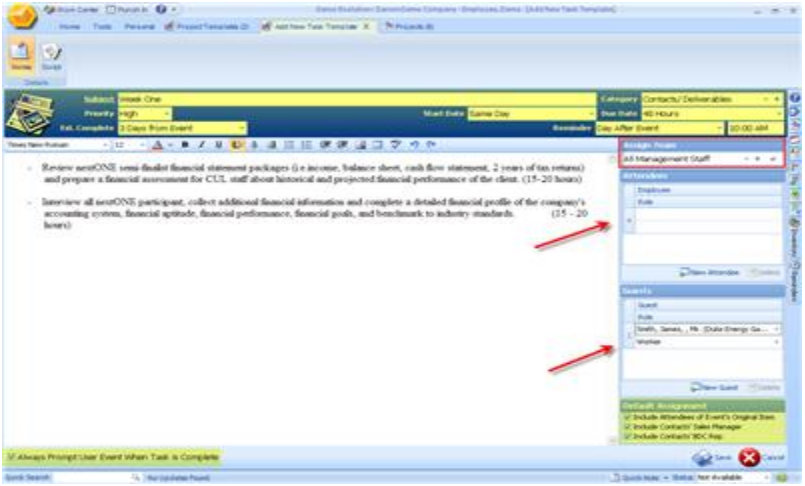
- Project Overview (Enter in any Notes and Outlines you would like to display here)
- Detailed Plan (Create the Appointments and Tasks, in the order they need to be in for the type of Project you are establishing)
- Project Team (Assign the team to your Project Template and each time the Template is used the same group of people will be notified with all related Tasks and Appointments relevant to that Project)
- Products Involved (Assign specific Products/Services to your Project automatically by assigning them to the Project Template)

Clicking on the Detailed Plan icon in the tool bar will take you to the following screen you see below where you can specify how many Tasks and Appointments you have and in what order they will be in when a new Project is setup.



Use the 'New Task' and 'New Appointment' icons to create Appointments and Tasks, or child Appointments or Tasks (also known as Predecessor Tasks or Appointments) in the order you want. ***You may change the order of existing Tasks and Appointments in a project by highlighting a Task or Appointment and using the blue arrows (circled in red) to change the order of them in a Template.***

Additional detail can be added to a Project Template within each charted Task and Appointment as well. The view below illustrates this using an example Task. the highlighted ares can be filled out ahead of time in your Template so that each time a Template is used the content is pre-filled in.



Setting up your internal Employees to be assigned to the Task can be done ahead of time and reminders can be setup for each charted Task and Appointment within Tradepoint as well.

The remaining tools for Assigning teams and Products Involved can also be created for each Template. Doing so will setup the same Products Involved and team Members for each Project that this Template is used for.

Assigning Teams-When you assign a Team to a Project Template that team will be added to each Appointment and Task that is a part of the Project. Any additional people will have to be added to either the Attendees(for Employees) or Guests(for clients or people outside of your organization)

Products Involved-When Products are added to a Template for Projects they will be a part of each Project that uses this template, any additional Products can be added to each Project as they are created.

When you use a Project Template each screen will pop up in the window for you to change any detail if necessary. These will happen in sequential order they were created in the Project Template and can be closed by clicking the close icon in the lower right corner as they pop open when you create the Project.

Each Task and Appointment can be altered to suit specific details should your Project be slightly different that the template is designed for. Adjustments can be made as each screen pops up when you create a Project using the Templates.

EMAIL TEMPLATES

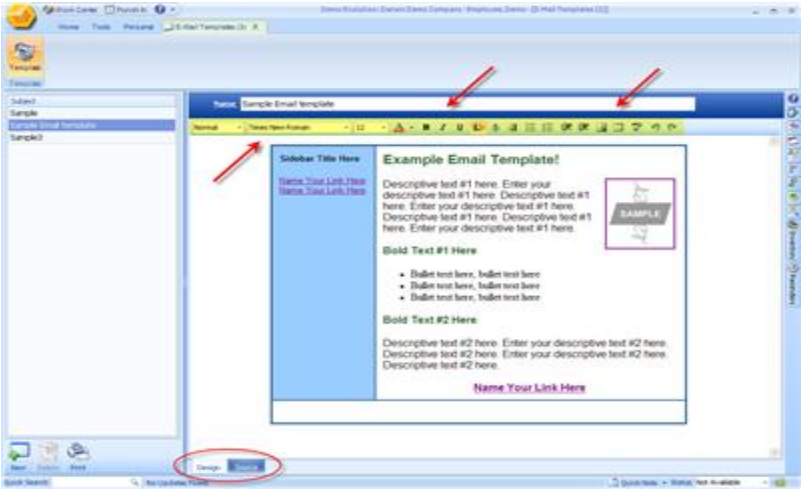
Tradepoint allows you to import from an external source or create your own email templates whether you use HTML or text based email templates. Email templates will be commonly used for:

- Sales
- Customer Communications/Service
- Event Notifications
- Newsletters
- Marketing to Leads

Emails can be created within the HTML editor in the Email Templates tool. You can also copy/paste HTML or text code into the Email template and the Email will be saved automatically. Any graphical elements within your Email templates that are in the HTML code that you Copy/Paste will automatically generate within the Email template you generate.

The email template window is very simple with the tool bar at the top to build your Email templates in a Word based format and the tabs at the bottom that will allow you to build your email templates using text or html language to do so.

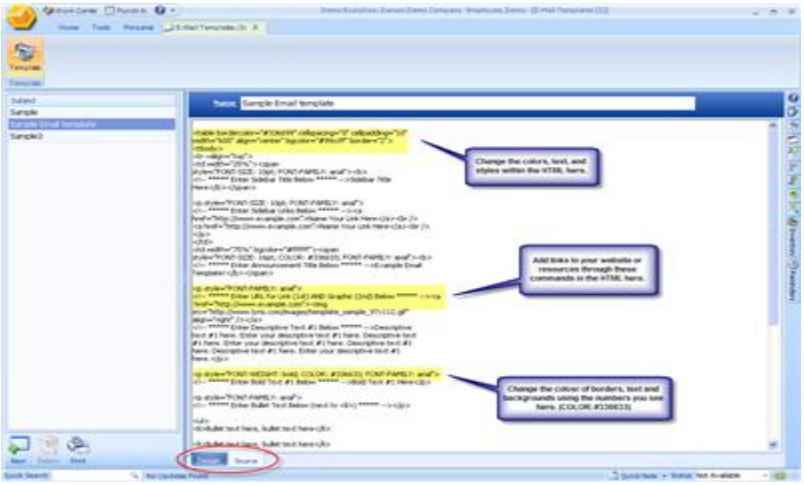
The image below shows an HTML Template that has been copied and pasted into the Email Template tool in Tradepoint.



The tool bar highlighted in the top of the image has tools for formatting and bringing in images into your Email templates. The Design and Source tabs are circled at the bottom of the window. The example shown here shows the Design view in this image.

Editing can happen in the ***Design*** view (what you are seeing) as well as in the Source view of the Email template. This is the easiest way to edit an update your Email templates.

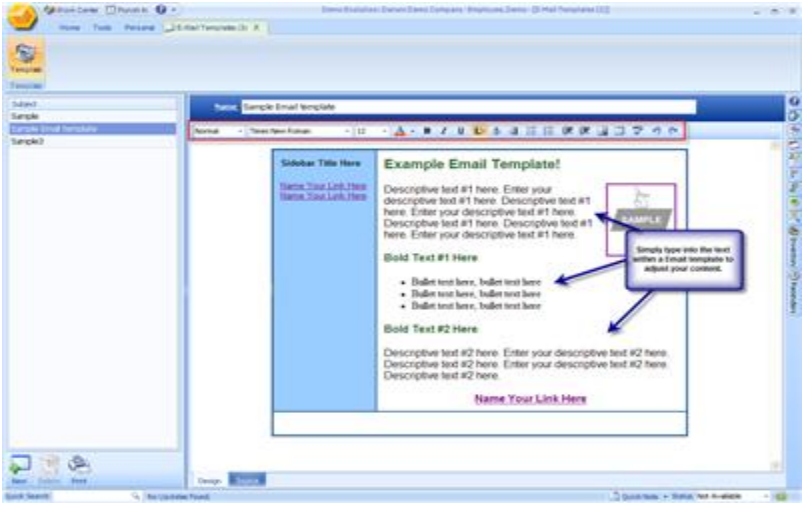
The window view below shows the ***Source*** tab. This view will show the HTML code for any email templates that are built. This is true, even if your emails will be text only. The Email template writer will build in any HTML code necessary for templates.



You can make edits directly within the HTML you see including things like:

- Changing color of text, borders and backgrounds
- Adding text and content
- Adding/Editing hyper links to resources or web pages

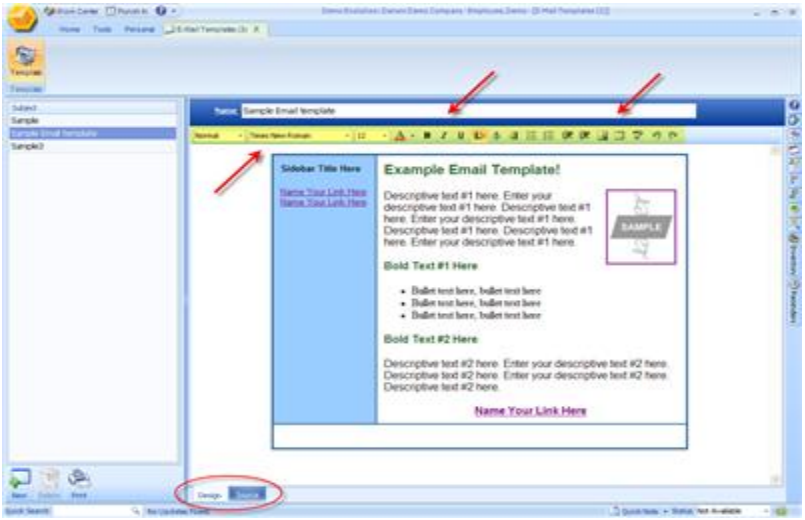
The Email template tool will allow you to build from scratch or copy/paste existing email templates easily. Full graphics capabilities exist as well as the ability to embed links to web pages, documents and other resources in your email templates.



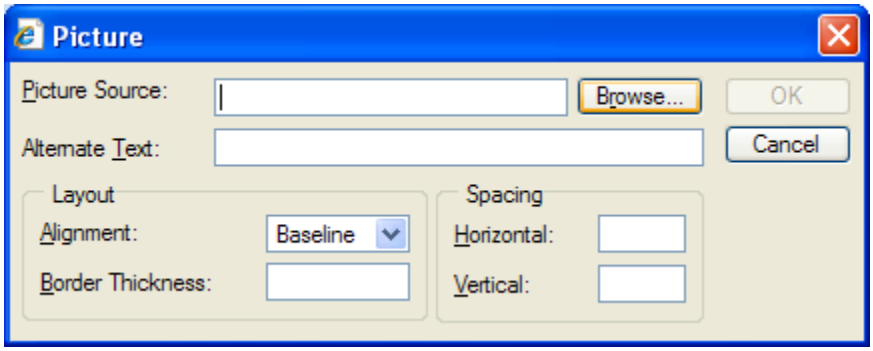
EMAIL TEMPLATES- SUPPORT FOR GRAPHIC ELEMENTS

The easiest way to add graphical element to your email templates is by using the ***Add Image Tool.***

The tool bar you see highlighted in the Image below shows the add Image tool. 



Clicking on the Add image tool will open this window you see below to locate the image you want to add to your Email template.



Click the Browse button to search for and find the image you want within your PC to add to your Email template. *The add image tool is also available within any window where you see the editing tool bar including:*

- *Emails*
- *Projects*
- *Templates*
- *Call logs*
- *Tasks*
- *Appointments*
- *Notes*
- *Knowledge Base*

Press Release Templates

Press Release templates will have the same editable and graphic capability as Email and Knowledge Base templates to give your Press Releases as much of a customized look as you would like.

The screen to create a Press Release is shown below.

This is the graphical view showing what would be displayed through your website. Your 'New' button is in the lower left to create a New template. Different press releases are listed in the upper left. The 'Design' and 'Source' tabs are at the bottom of the screen.

The Source tab will show the HTML code in the background of your Press Release. ***Whether you Copy and Paste the design content from another source or you build the content of the template within the Design screen the HTML will be built in the background and appear as you see in the view below.***

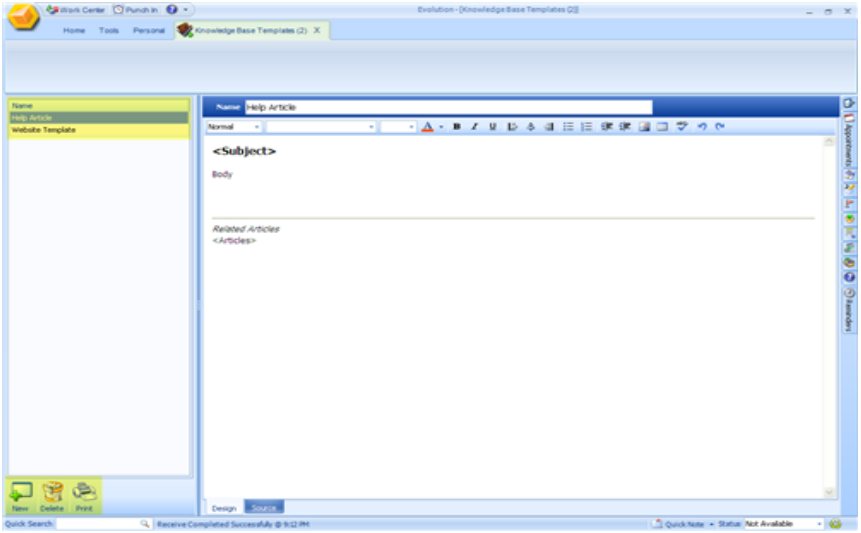
The HTML can be edited directly if you know how to build email templates in HTML or they can be edited to make small adjustments to existing templates within this screen.

Knowledge Base Templates

Templates are primarily used for formatting articles for consistent styling in text, graphics and overall appearance.

To establish a knowledge base template follow these steps.

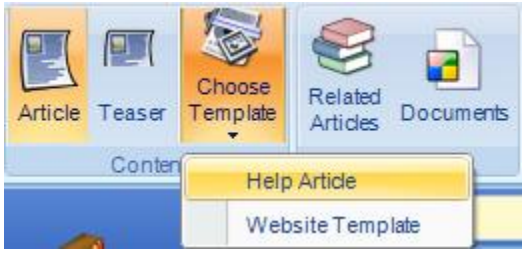
1. From the Home Tab click the Tools Tab.
2. From the Tools Tab click the Knowledge icon.
3. Click the New icon to create a New Template.



The example above is a basic formatting template for articles which will have the content generated directly within the knowledge base.

- The Subject header is at the top of the page and this will automatically generate the Subject of the article at the top of the article body. The text has already been established and will automatically come up as Tahoma 10 pt based on this example.A border will show at the bottom of each article as shown here.Any related articles will appear listed at the bottom of each article.

When a template has been created it will appear within a new article window under the template icon in the top tool bar.



Anytime a template is chosen it will pre-populate the article with any preferences built into the Template.

If you choose a Template after you have entered in your content the Template will over write any existing content.

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