Product Manual & Usage Guide

2009

Tradepoint Product Manual & Usage Guide - Version 2.782

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All screenshots in the Product Manual and Usage Guide were taken from the North American version of Tradepoint Business Management Software,

Welcome! Introduction

The Product Manual and Usage Guide is designed to assist in self guided implementations as a self service based resource. Additional resources are found through our website in a web portal in our searchable knowledge base at www.darwinproductions.net/support

If you don't have a login one can be created by clicking on the new client icon. Fill out the registration form with a password and then you can login to access online resources.

The articles you see on the main page are the newest ones. Click on the description in each article to see the complete article.

A dynamic linked 'contents' is available for the most commonly requested topics. Accessing the contents is done by typing in 'contents' into the search tool and clicking the search icon. Each article can be accessed by the links found in the online contents.

Use the back button in your browser or click on the Support option in the top tool bar to be directed back to the main support page.

The online knowledge base includes expandable menus and a dynamic search tool. To find an article, simply type in a topic into the search field then click on the search icon to retrieve any articles with that topic in the name or content of the article. Links to related articles can be found within each article for easy navigation.

Getting Started: Installation

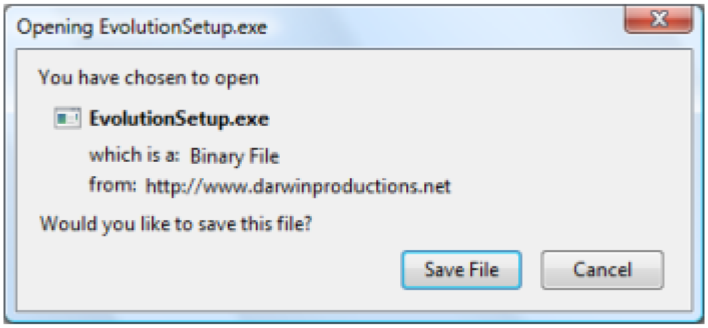
First Time Installation

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

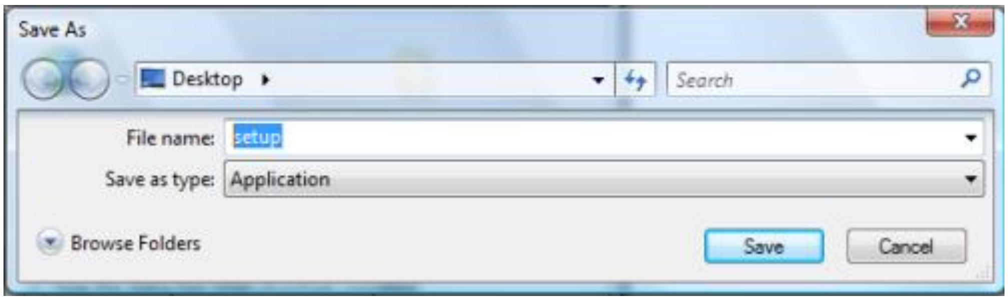
The installer link for Tradepoint is:

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

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

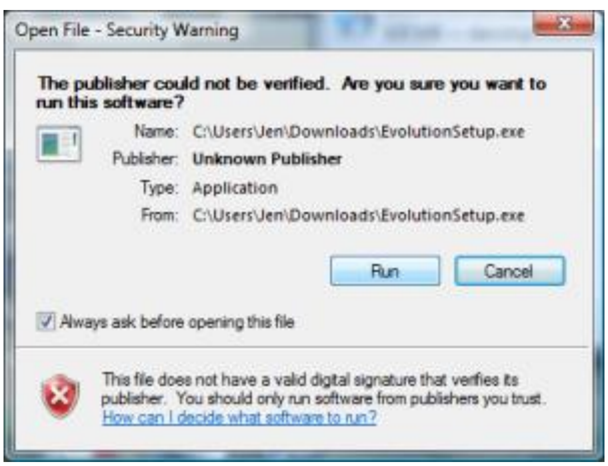


Choose 'Save File'. For companies loading Tradepoint onto multiple machines install this file on each machine that will have Tradepoint. The file size is 110mb and download time will vary depending on Internet connection. ***Wireless Internet connections can fluctuate therefore, we recommend a direct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

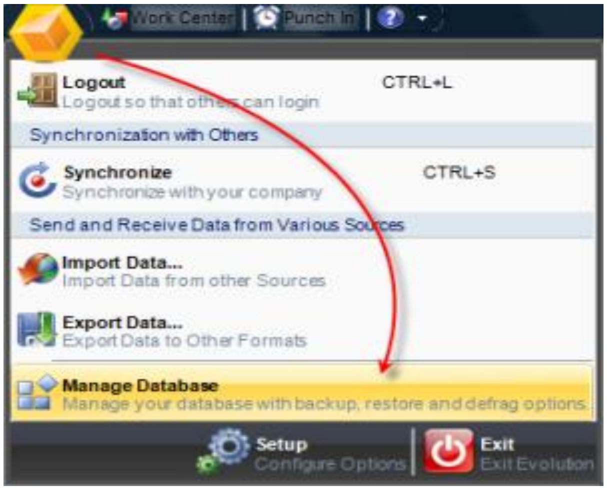
To restore or install Tradepoint on a new computer or additional computer the Installer file will be installed on the computer as well as a remote backup of your company's information.

Creating a Remote Backup of a Database

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.

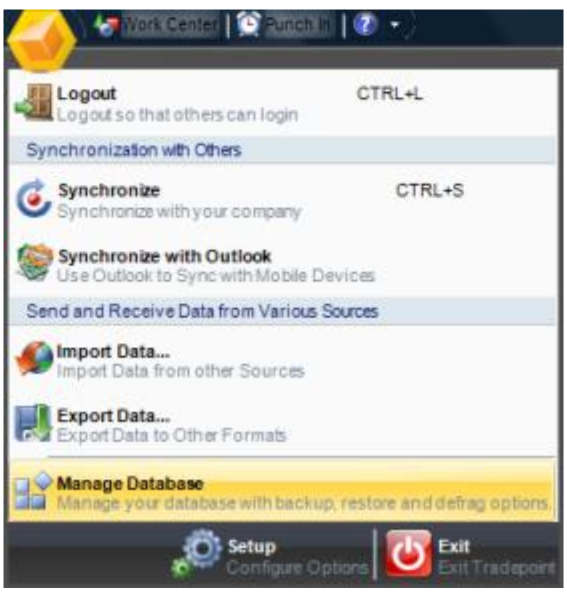
Once the file location has been chosen click the Save icon and the backup file will be created in that location.

Create a Database Backup - To Restore on Another Computer

To create a database backup for restoring Tradepoint onto another machine follow these steps:

1. The Database Management menu is found under the Management Menu icon. 

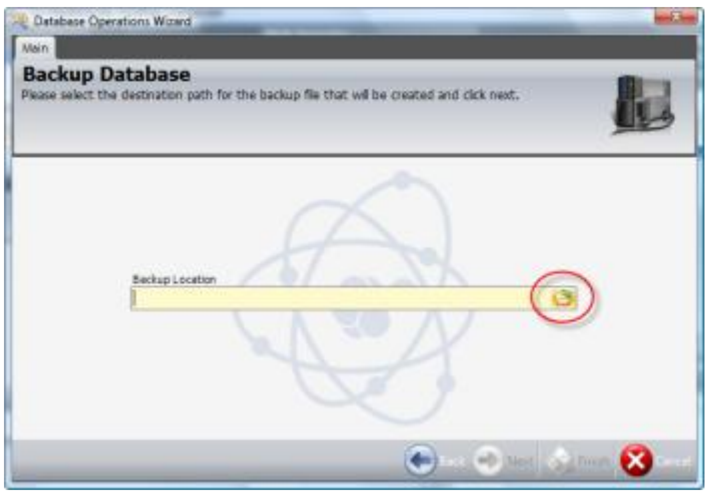
2. The option for creating a backup is the highlighted option in the Management Menu.



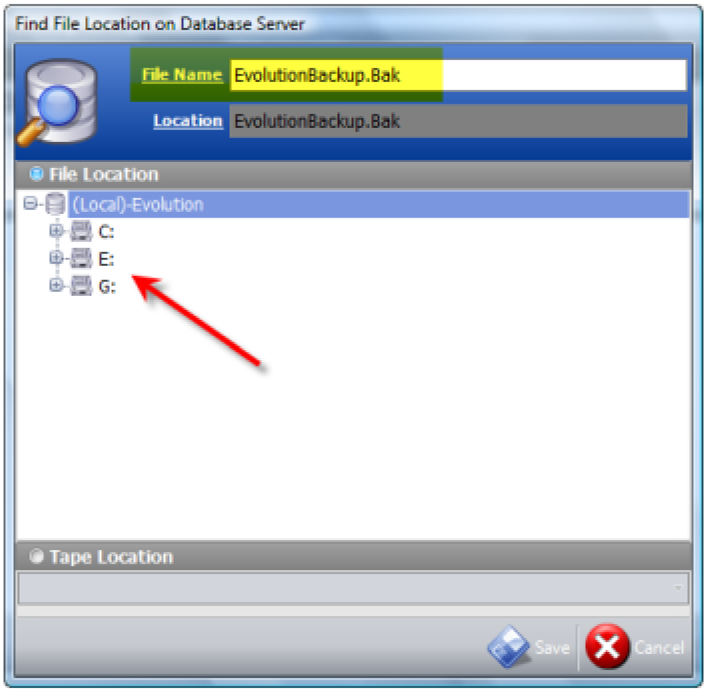
The next screen shows 4 different types of options.

3. Choose the highlighted option to create a backup to be restored on another machine as a remote or networked user.

4. The next step will be saving the backup to an accessible place through the file structure showing on the following screen.



Type in the file address or click the file on the right of the screen to browse for a location on your network or local machine to save the backup for.

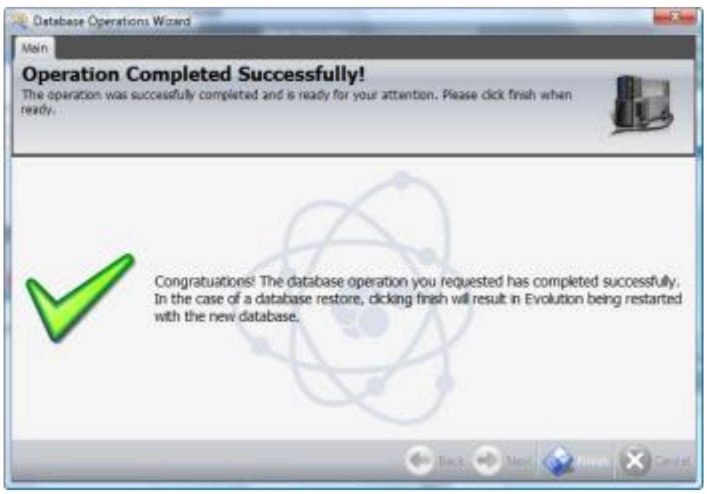


The File name field is editable. It is recommended to add the current date or company name for backups to the file name field (highlighted above).

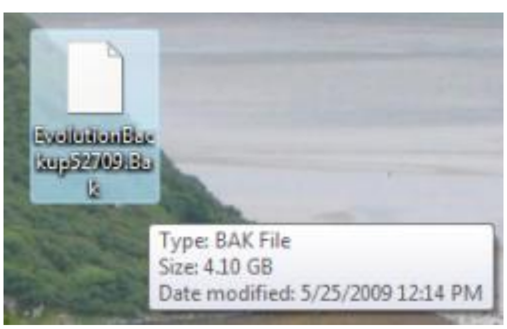
The location of the file will appear in the Backup Location field.

5. Click Next. A progress bar will show on the screen.

A prompt will appear letting you know when the backup has been created. (The longer Tradepoint has been in use the larger the database so, it may take a short while or w longer while to create a backup)



The backup will appear in the specified location as a ***.bak*** file. In this case it was saved to the desktop.

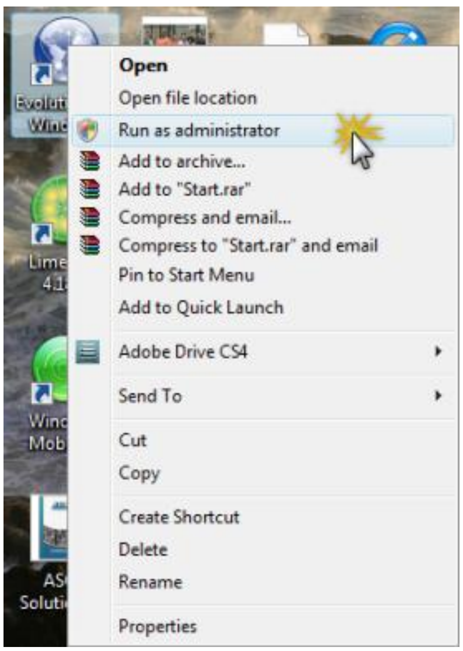


Restoring/Installing Tradepoint on another Computer

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.

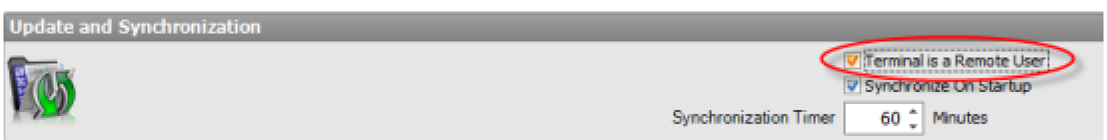
7. When finished you will be directed to the login screen for Tradepoint.

Change a Remote User to a Networked User

When a Remote user becomes a Networked user it does mean that a laptop will be in a fixed location and is a part of the network. *Once a laptop becomes a networked user it will no longer be able to synchronize if it is moved from that location.*

To change a Remote user into a Networked user click on the Terminal icon. 

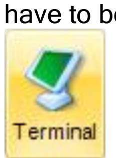
Then uncheck the checked option for 'Terminal is a Remote User'.



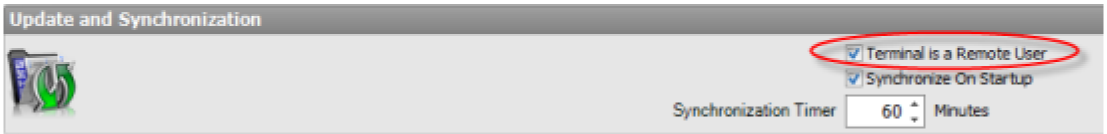
The synchronization options below will gray out and the computer will be a Networked user. The Synchronize option in the Management Menu will also be removed.

Change a Networked User into a Remote User

For customers who have computers set up as networked users on Tradepoint and one of those machines needs to become a remote user(this is usually a laptop that is in a fixed office location), follow these steps to change the type of user from a networked user to a remote user.

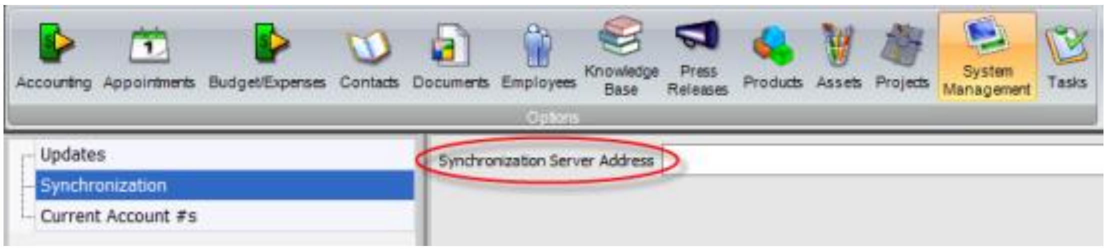
1. The terminal Settings will have to be adjusted from Network to Remote. To find the Terminal icon, click on the tools tab and then the Terminal icon. 

The option under Update and Synchronization for Remote user will need to be checked off. Save your changes.



2. Remote users will need a synchronization address. This will be the address of the database and will depend on where your main database is located. For companies hosting their database themselves or through an off site 3 rd party hosting services your network administrator will be able to provide you with the synchronization address.

The synchronization address will need to be entered in the Setup & Configure tool under the System Management icon.



Once these two items have been entered in then logging out and back in you will see the synchronization option in the Management Menu and the synch should occur Once you log in(provided the option for that has been checked off under Terminal Settings).

Company & Division Setup

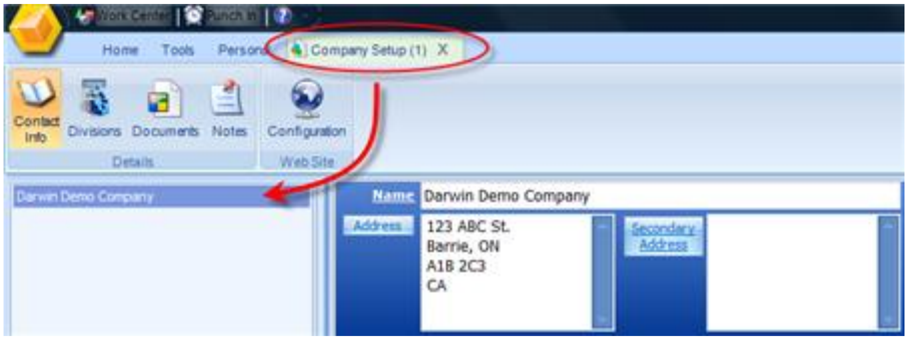
One Company with One Division

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

.

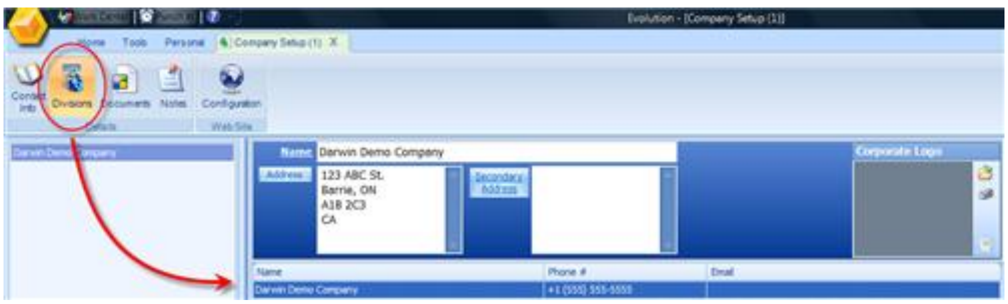
Within company settings screen is where you set up the main company. The contact information screen is where you will be directed initially. This example shows one company. When you login to Tradepoint for the first time to set up any remaining company settings your company settings will look similar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

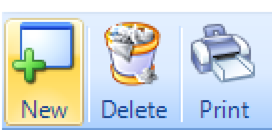
Accessing the details of a company is done by clicking on the Divisions tab next to the Company icon you see in the view above.

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.

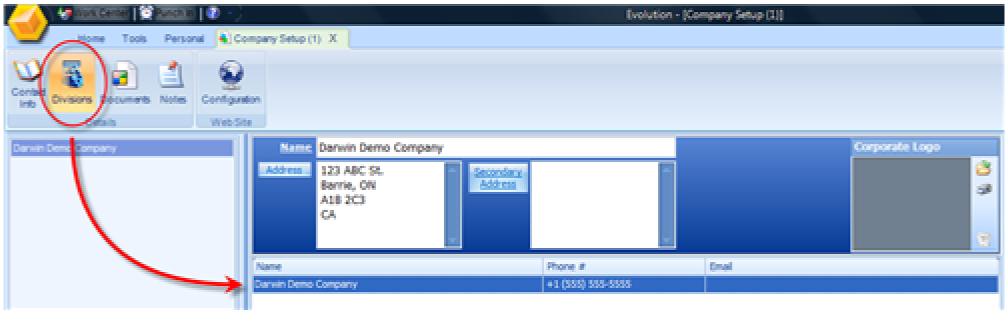
Within the Company Settings screen here there will be a 'New' icon in the lower left. This icon will create a New Company.



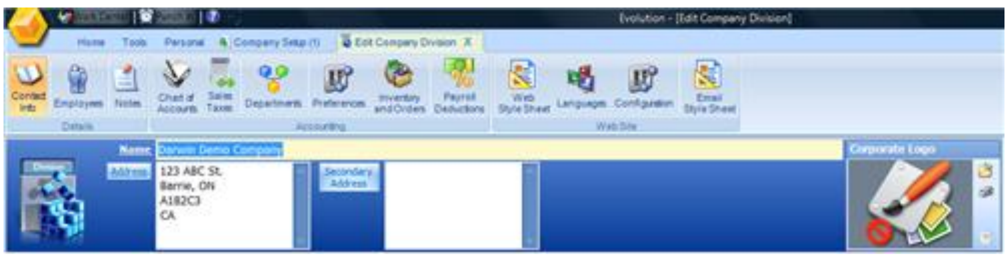
On the lower right there will be a 'New Division' icon. This icon will create a New Division within an existing Company.

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.

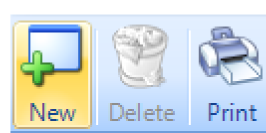
Multiple Companies

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

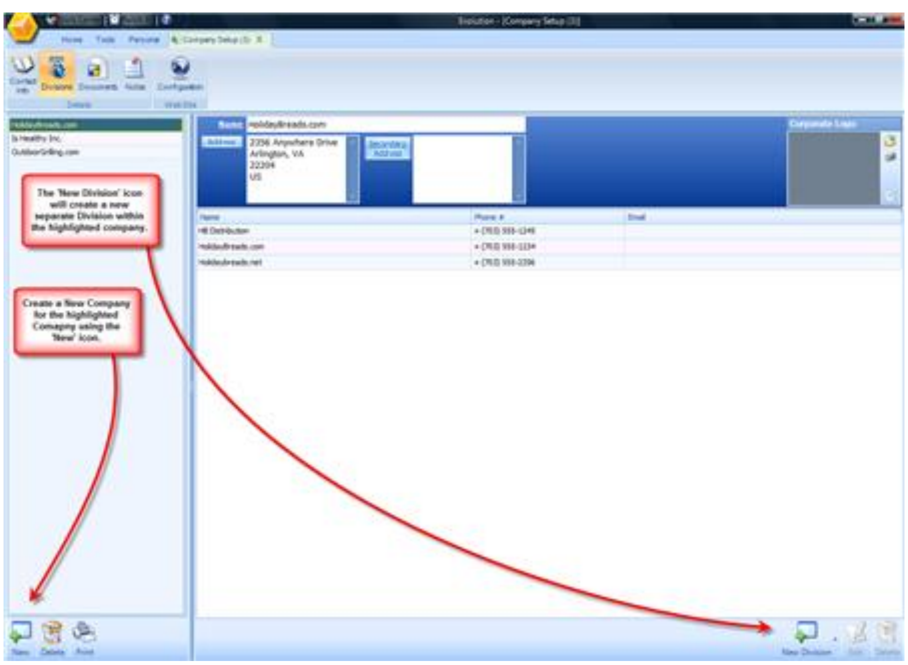
Multiple companies with multiple divisions structure provides the ability to have completely separate companies with each of those companies having more than one Division.

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

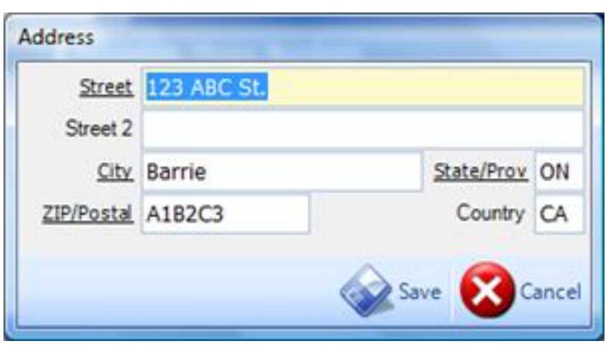
Within each Company and Division in Tradepoint the contact information acts as the anchor for all of your company and division details within Tradepoint.

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.

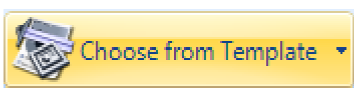
Using A Template

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.

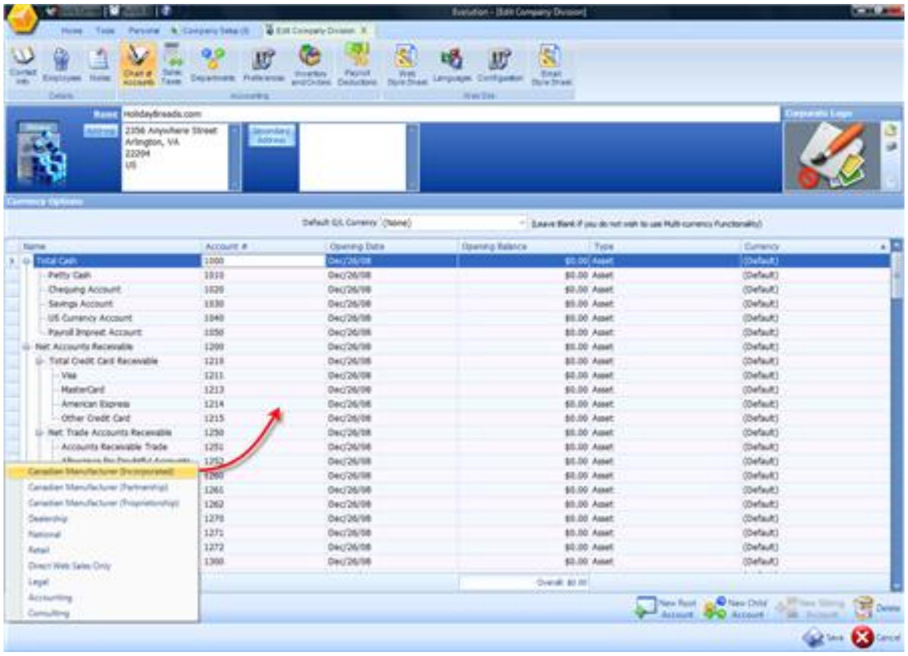


A pop-up menu is built in so you will see a number of choices to choose from.

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.

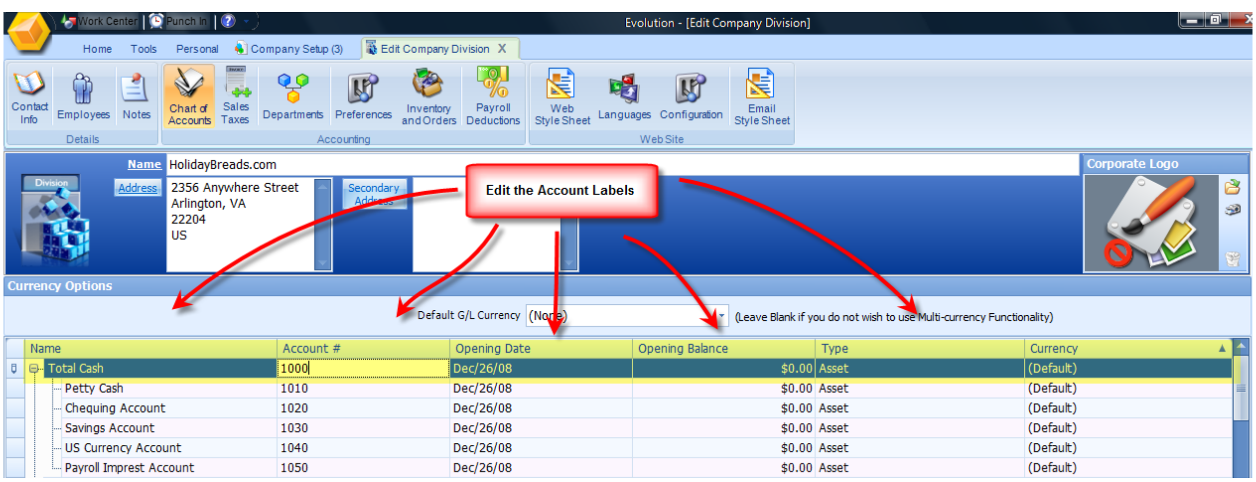
Templates can be adjusted easily to include additional accounts, delete accounts or change the names and types of accounts within each template.

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.

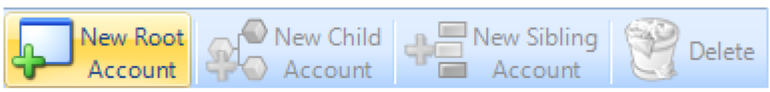
Manually Create a Chart of Accounts

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

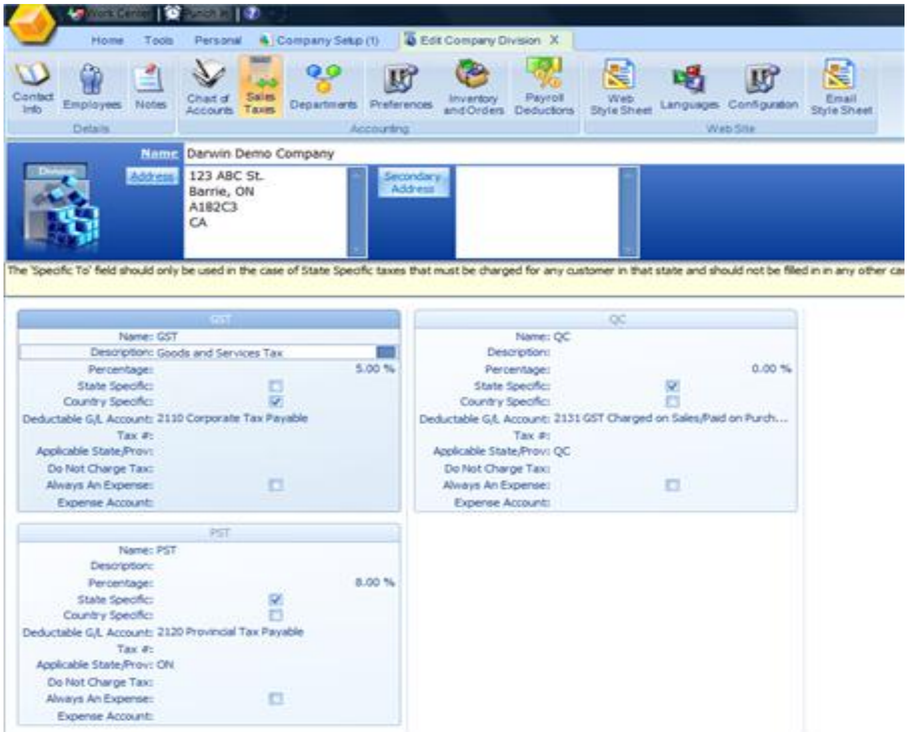
Sales Taxes attached to your Products

The Address and Zip Code of your Company has to be formatted using the Address wizard.

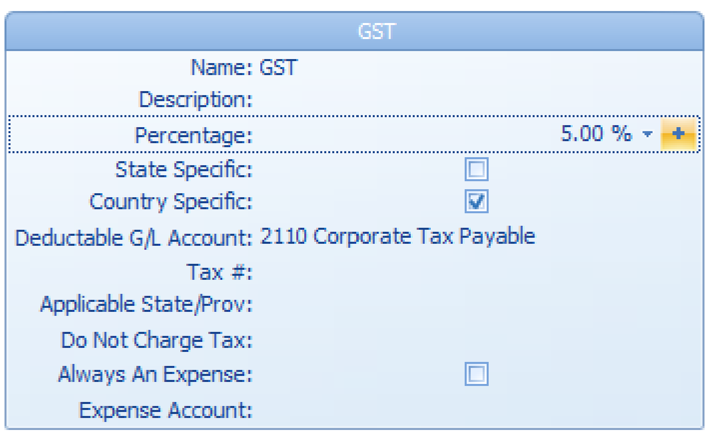
Companies based out of Canada will be able to create the GST, PST and respective HST or QC taxes depending on the location of the companies and the customers they serve.

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.

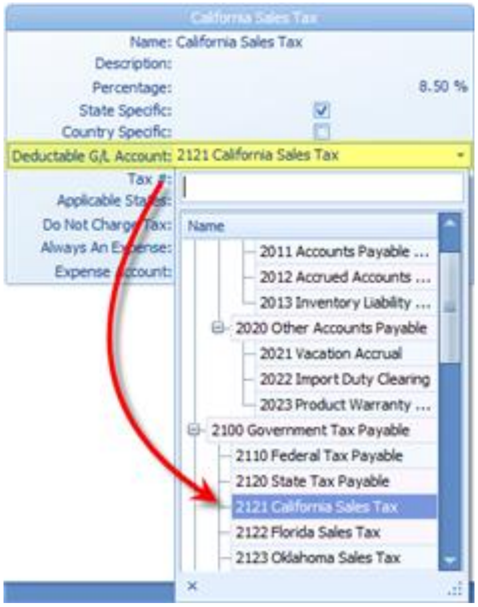
Since most companies will have at least one if not several sales taxes, Tradepoint supports an unlimited number of sales taxes and each of them will be displayed as a digital note card for easy viewing at a glance.



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.

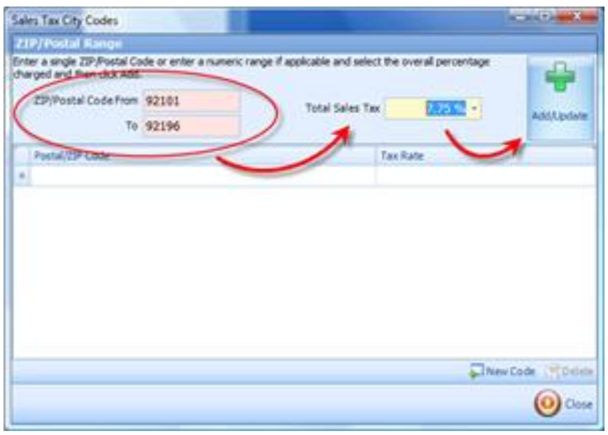
In this case we will illustrate how to setup zip code based sales tax rules including a zip code range for sales tax rules in San Diego to show how a range of zip codes can be entered and then adjusted if necessary.

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.



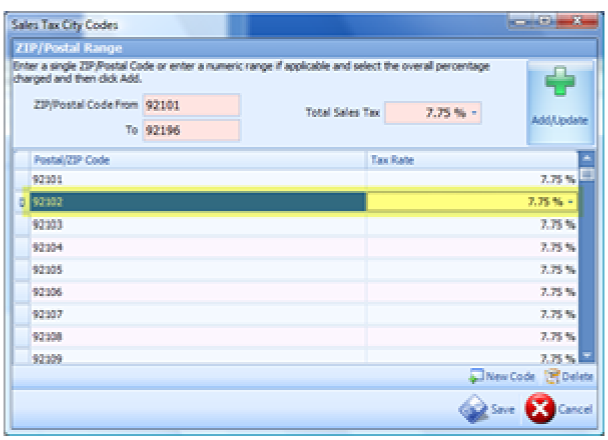
Enter in the Zip/Postal code range in the circled fields.

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.

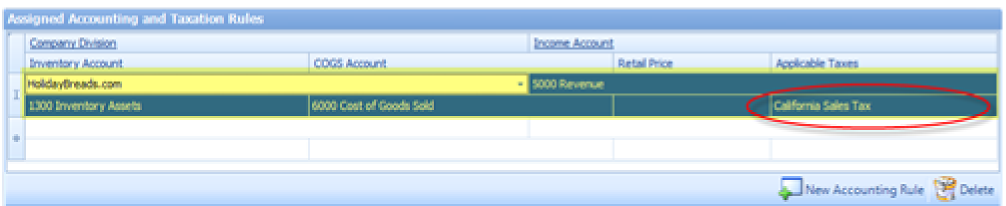
Each sales tax card in your company settings can have additional detail as shown in the example above or the main tax rate entered in on the 'Percentage' field will act as a default for that tax rule.

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

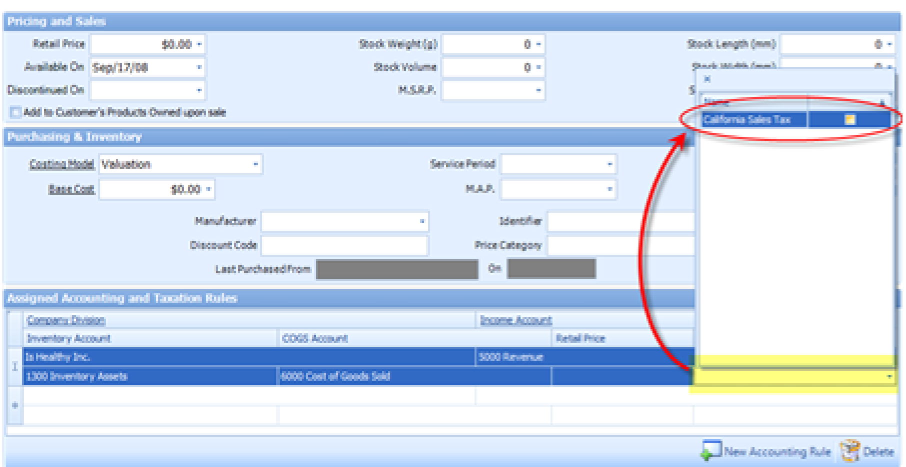
Applying Tax Rules to Products

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.

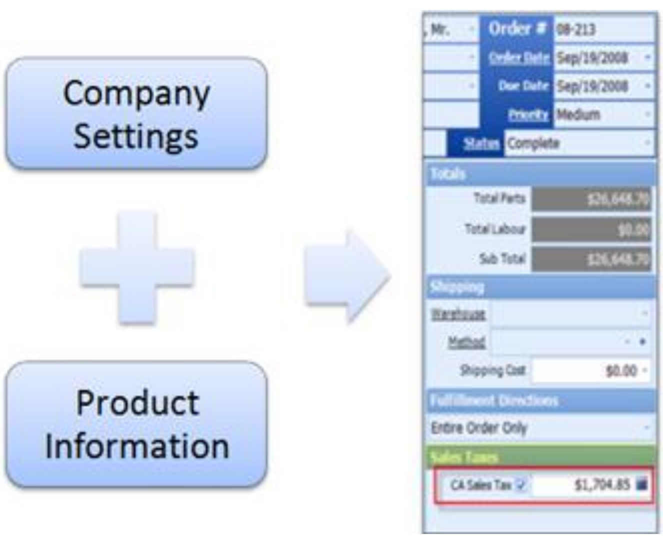
As for Sales Taxes this means that the main company contact information in your Company Settings is how Tradepoint knows to charge which Sales Taxes, for what Products in which locations.

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.

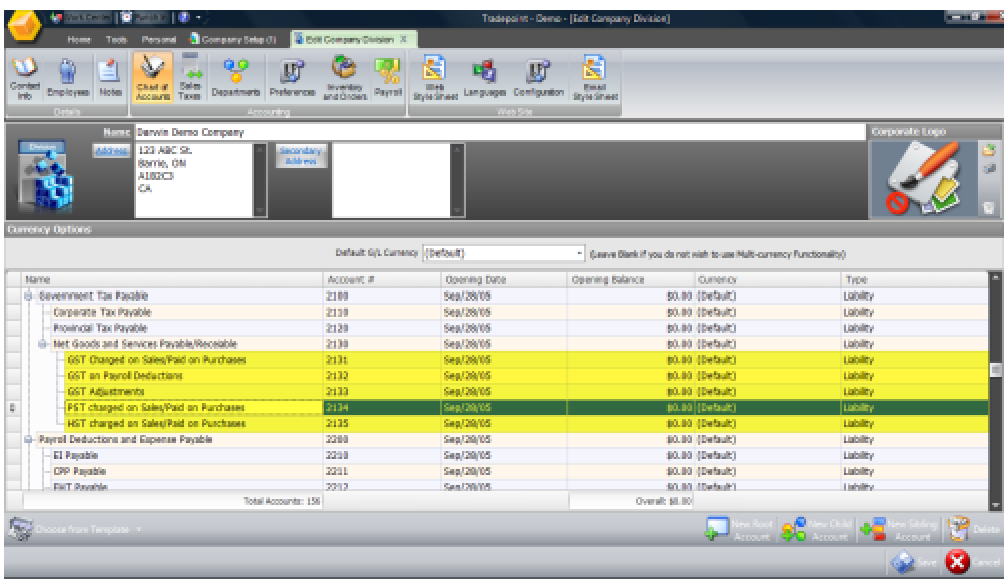
Departments

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.

Reporting on Sales Taxes

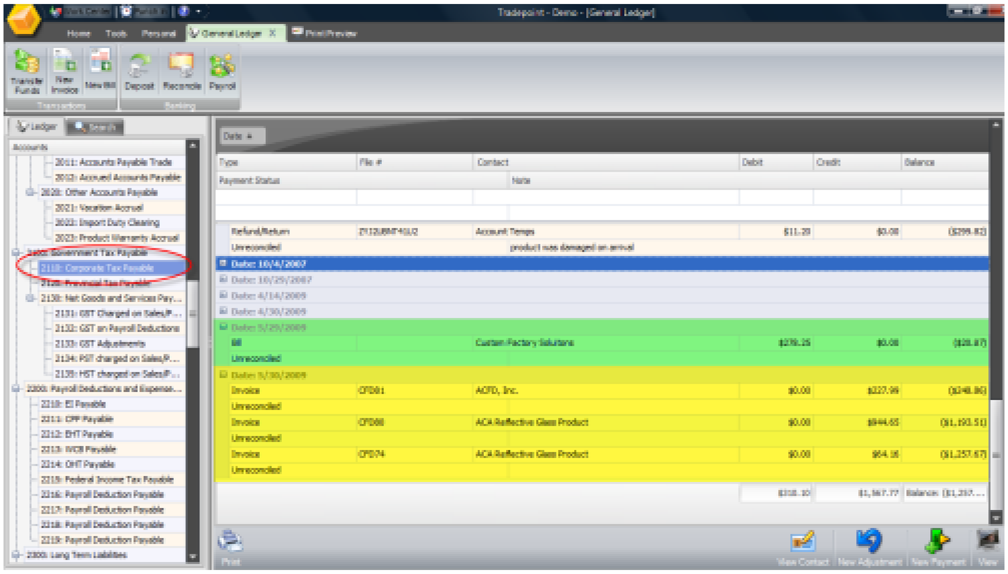
Reporting on Sales Tax activity varies depending on the country and state/province where business is done. Tradepoint sales tax reporting supports date ranges for monthly, quarterly and yearly.

We recommend having General ledger Accounts setup for each of the sales taxes whether national or provinicial (by state)a business has to collect and report on. An example of this within a General ledger will appear like the example shown below:

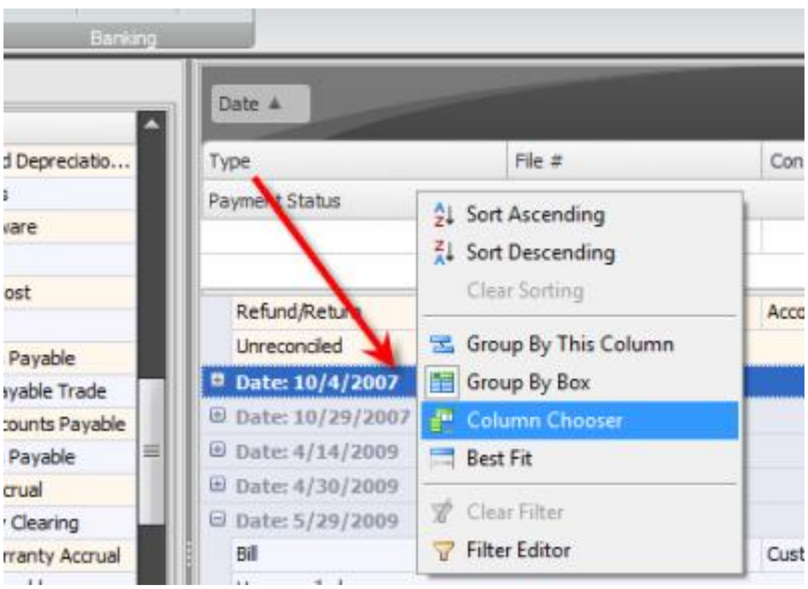


Once accounts are setup to parse the correct sales tax either by jurisdiction or based on country code(for national sales taxes) then a G/L search within those accounts for a date range will pull up all the sales tax activity and show how much sales tax has to be paid for a given date range.

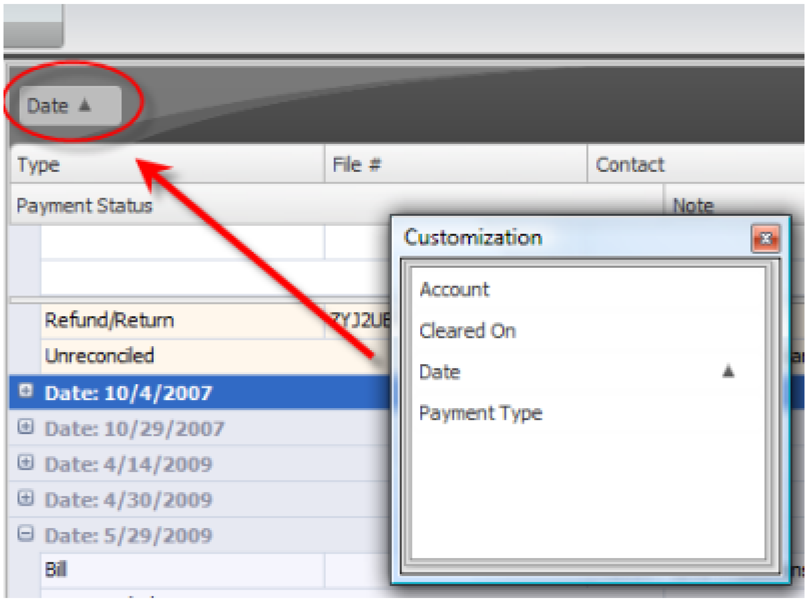
Within the G/L we will sort the transactions in the Corporate Sales tax account by date to isolate the sales tax allocated by date.



To sort by date, right click on the header field to drag the Date field from the fields in the Column Chooser into the header within the G/L.



The column Chooser holds additional options which can be dragged and dropped onto the header fields in the G/L to highlight how information is shown.



Fields within the header fields can be dropped back into the Column Chooser to simplify the appearance within the General Ledger.

How fields appear within the General Ledger will also be what appears in the print preview screen when a General Ledger account is printed out. An account print out can be modified to add company logo and contact information.

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.

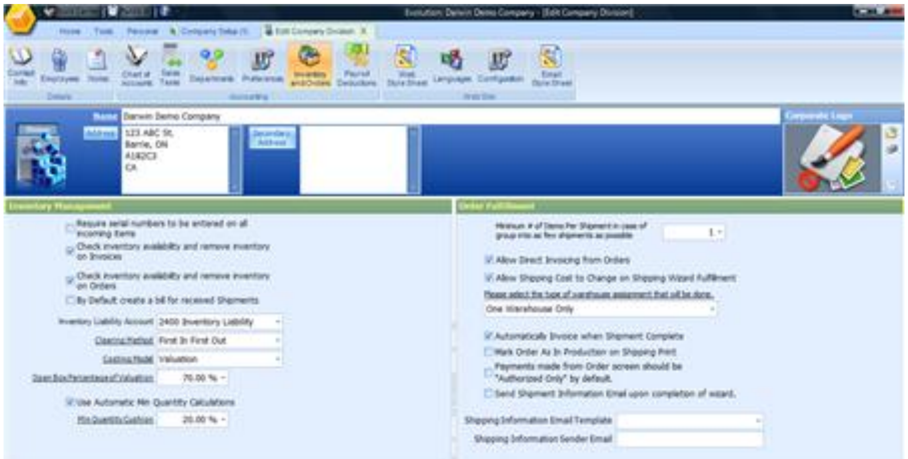
Invoicing: Check off the option to allow your Sales Taxes to be editable. This will allow sales taxes to be editable within all open Invoices.

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

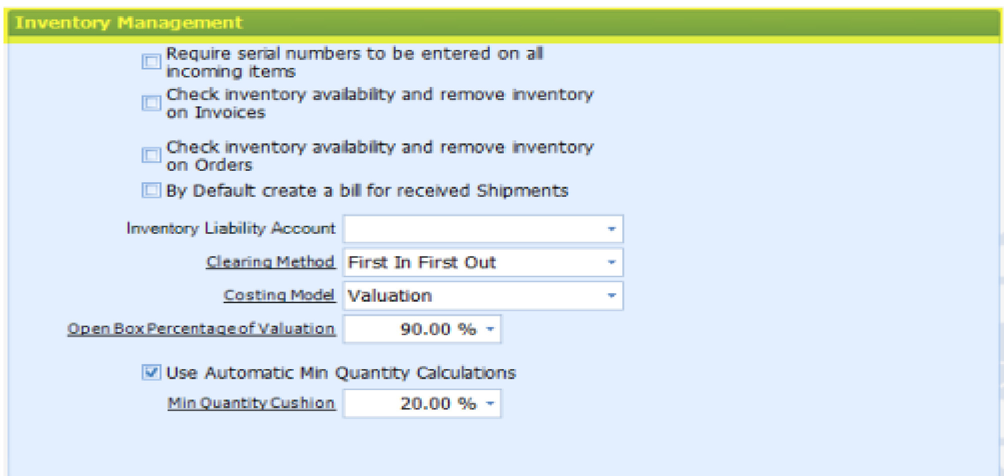
Note: All preferences will extend to your Ecommerce processes automatically when using one of our Ecommerce solutions or web services to manage your Ecommerce activity.

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.



<u>Inventory Management:</u> 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.***

<u>Note:</u> 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.

<u>Create a Bill for Incoming Shipments:</u> 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".

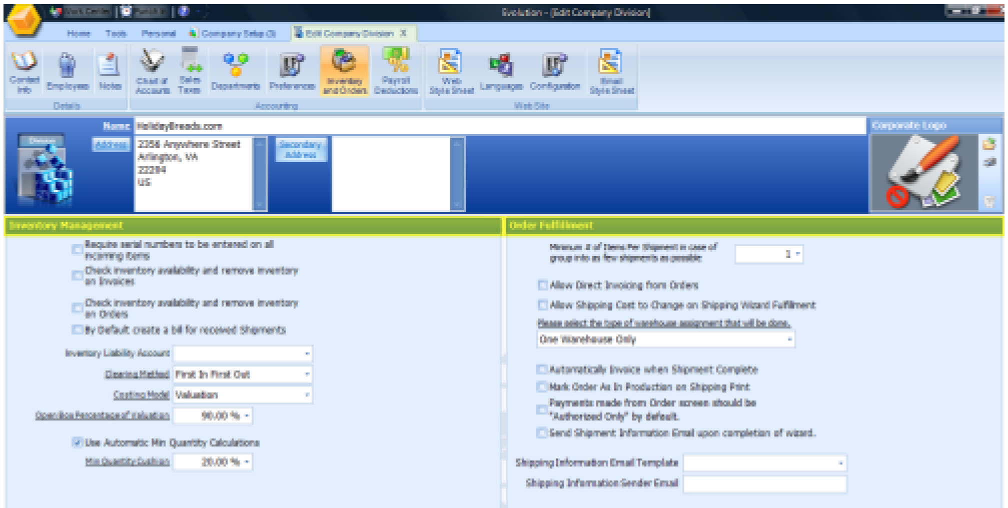
Damaged is written off at 100% of the original value and put in the damaged goods COGS account.

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.

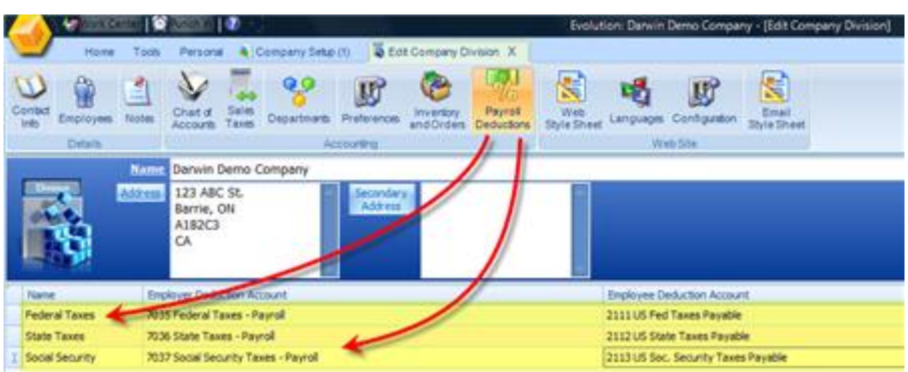
Note: If your company uses an external payroll company, Tradepoint also generated reports based on hours, salary or salary with commission which can be emailed in several different file formats.

Setting Up Payroll 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

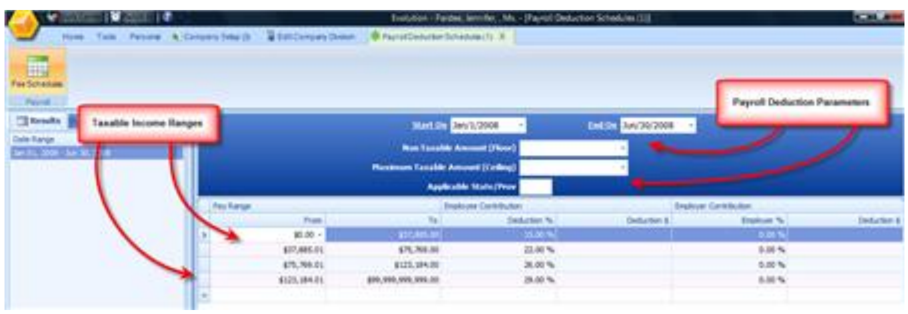
To create and/or access those fee schedules highlight one of the deductions and click the "Edit Fee Schedules' icon in the lower right of the screen.

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

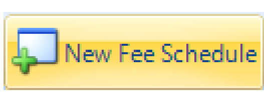
The next screen will have the fields for applicable parameters and for income ranges that percentages can be applied to. Each of the main fields in the top of the page is optional since multiple combinations of information may be the case.

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.

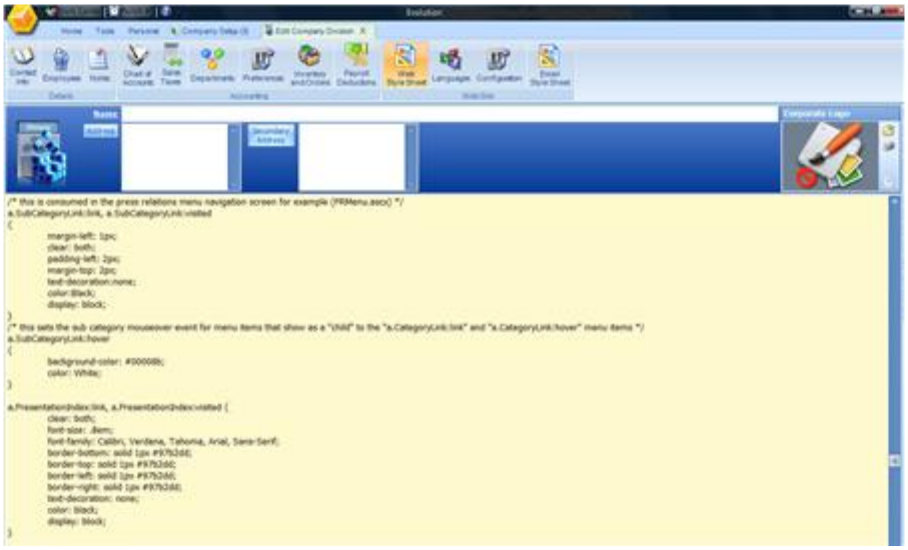
When all of your deductions have been set up save your changes. When Employee profiles with schedules are setup the second part of Payroll preferences will be explained as being specific to each Employee.

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.



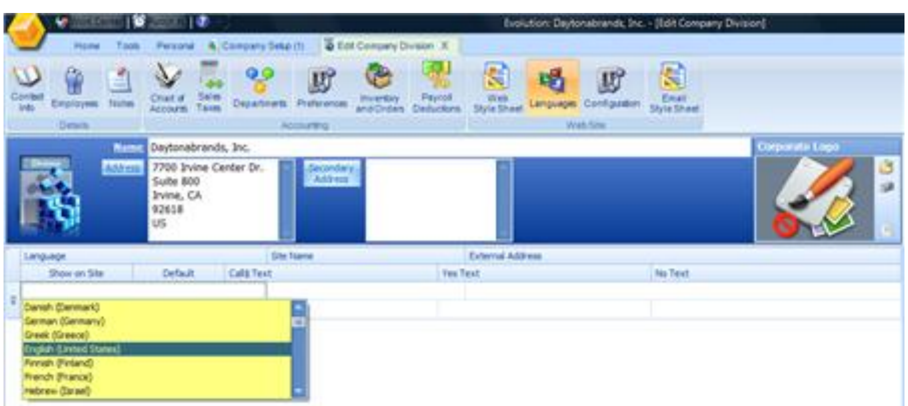
The CSS can be uploaded and edited from an editing program or the Photoshop file can be uploaded directly into the folder structure within your web hosting arena for your website.

Language Localization – Step One

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

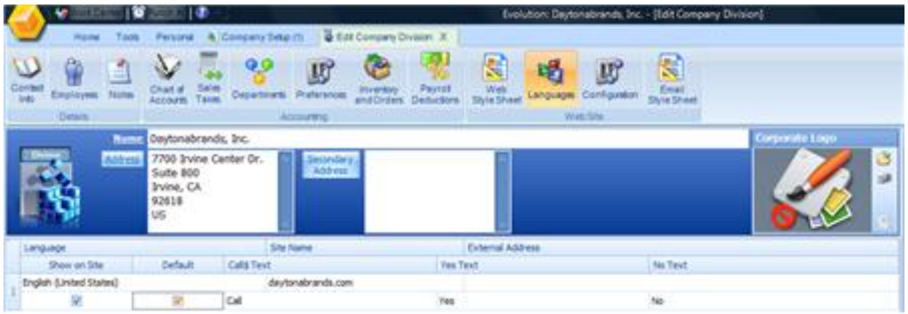
Note: The original website established within Company Settings will be the default website with localization preferences based on the type of shopping cart you are using (one language and currency or multiple languages and currencies). For companies using the multi-lingual ecommerce solution the language 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.



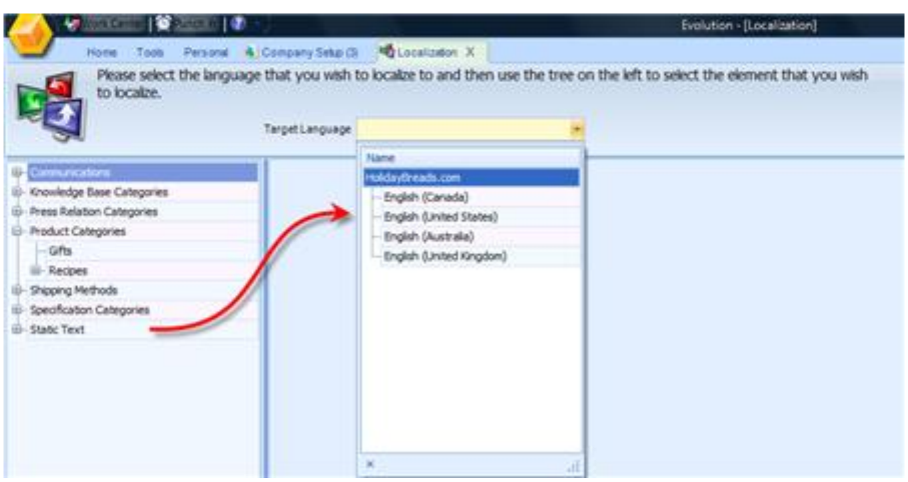
Language Localization – Step Two

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

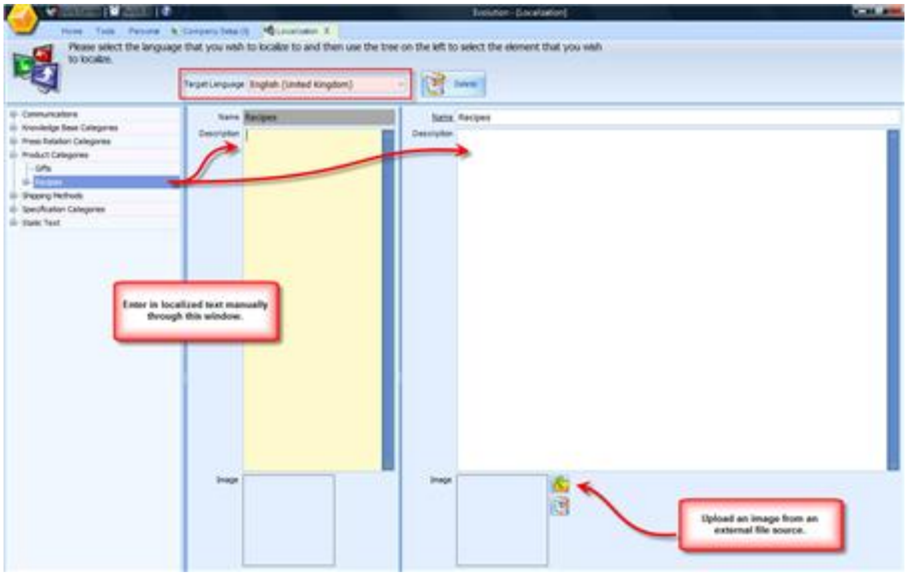
One or more languages can be setup through the Company Settings and then the actual content will need to be uploaded or created manually through the Localization settings found in the Tools tab.

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.



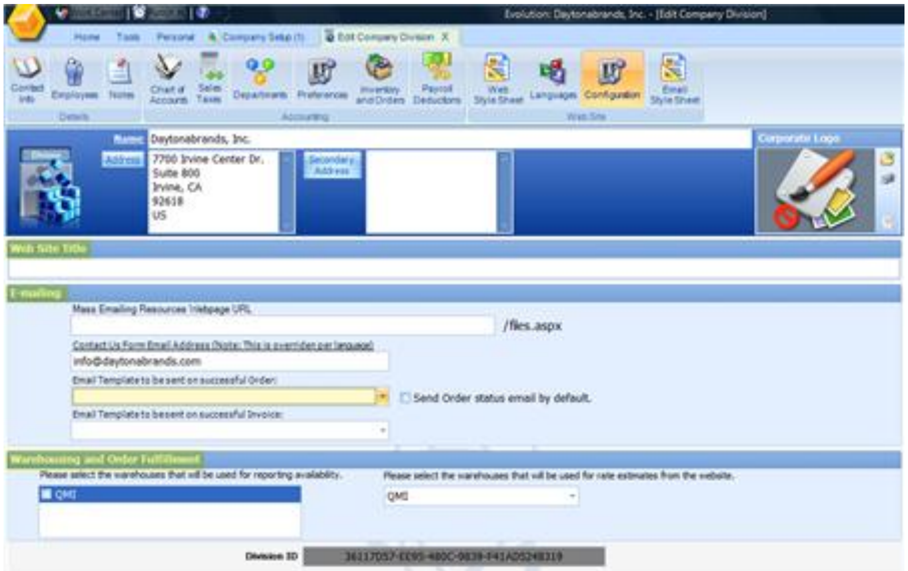
Content can be entered in manually on the right hand side, or copied from another source. An image can be uploaded into the content from the icons highlighted or added to the Static Text pages under the Tools tab.

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

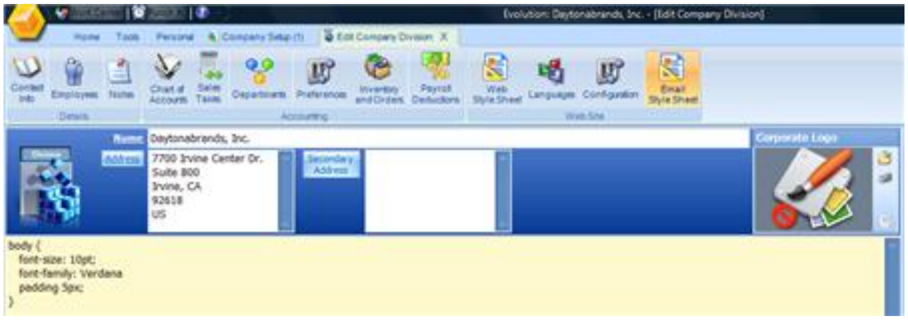
Email to be sent at the completion of a successful Invoice

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)

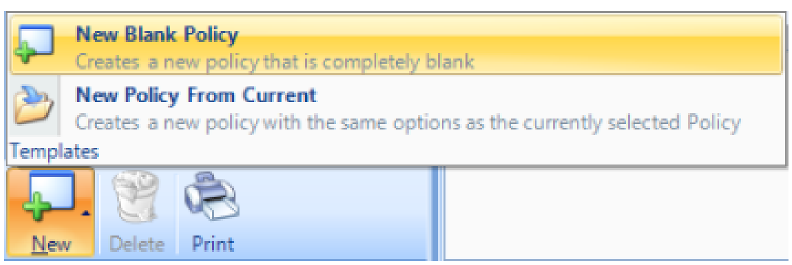
Additional permissions to information and functions can also be controlled through numerous options within Employee Settings for an Employee's profile for further shaping of a specific role or the ability to shape a unique profile.

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

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.).

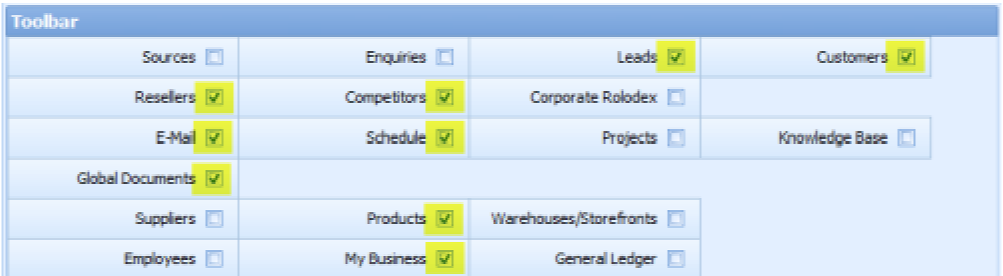
First, we will address enabling icons on each of the tool bars.

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:

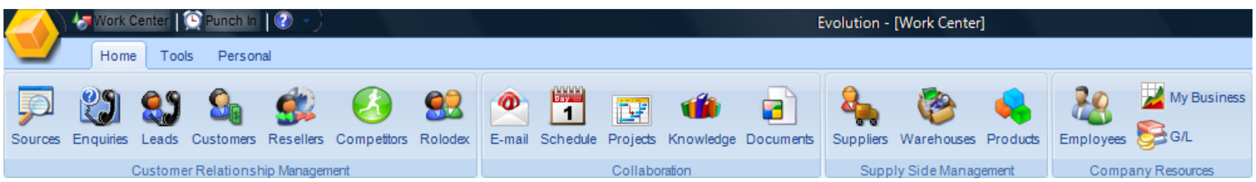
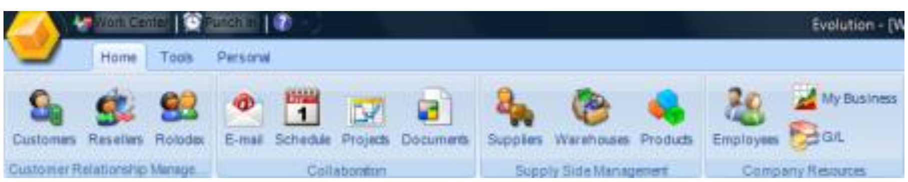
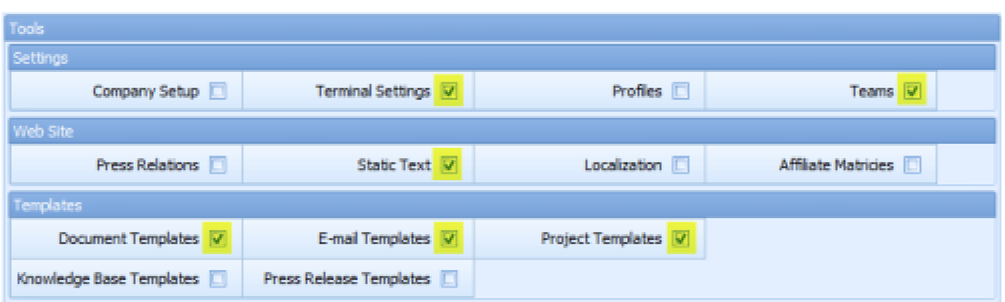


Image with specific access to show only icons checked off in Ex. A:



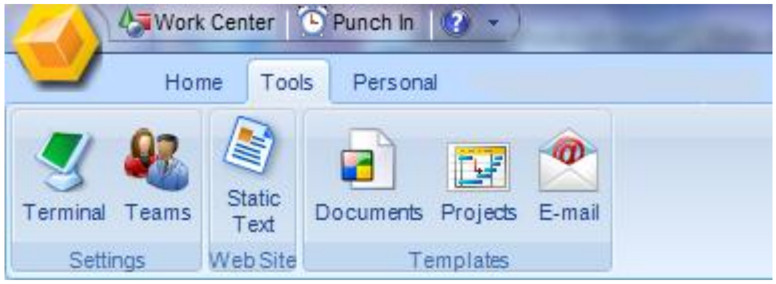
Icon visibility to the Tools tool bar will work in the same way:

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.:

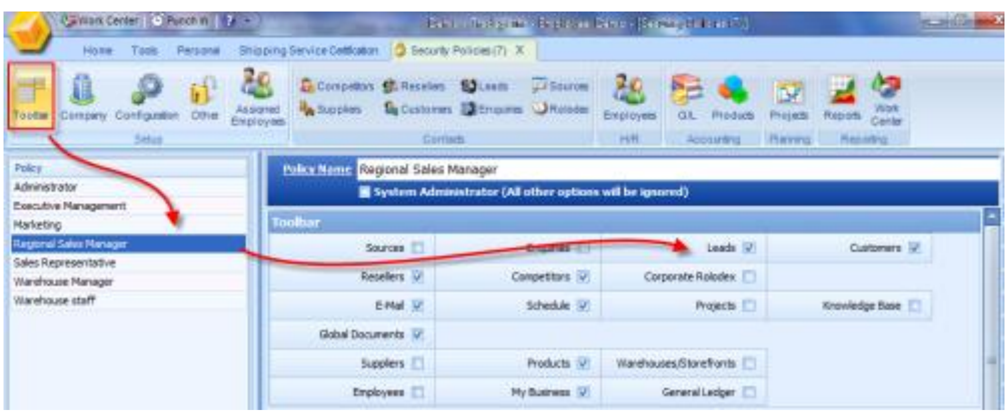


Each section within the security settings works in the same way.

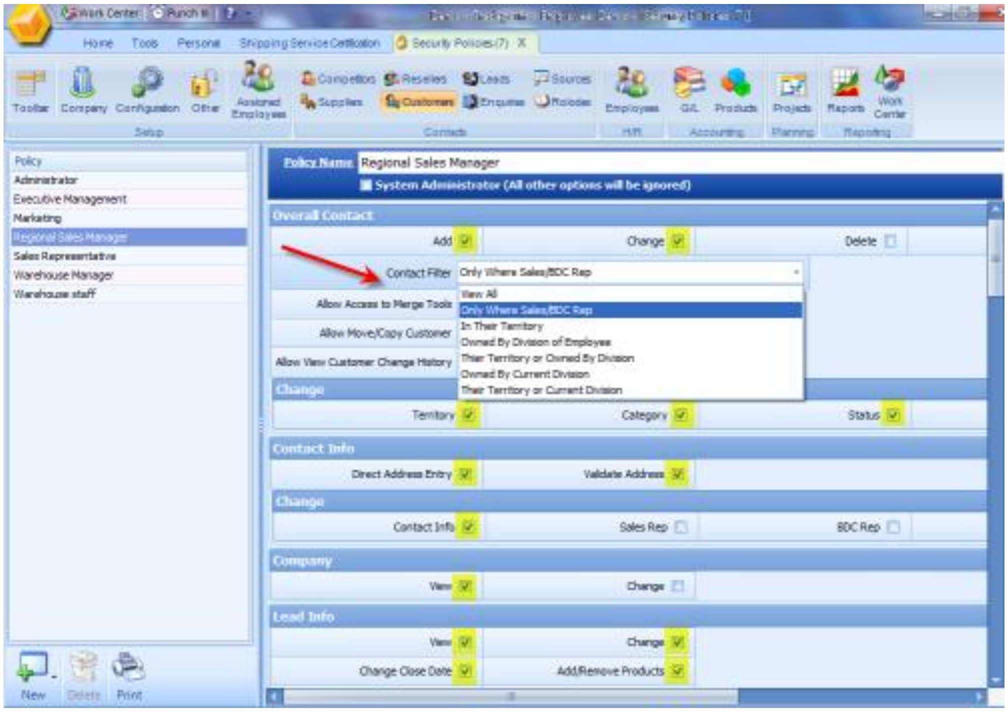
Note: Remember, any other access than Administrator will have to have each respective section Checked Off to have access enabled for your Employees. Administrator access is the only option that does NOT require options to be checked off and will over ride any other set preferences for full access to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

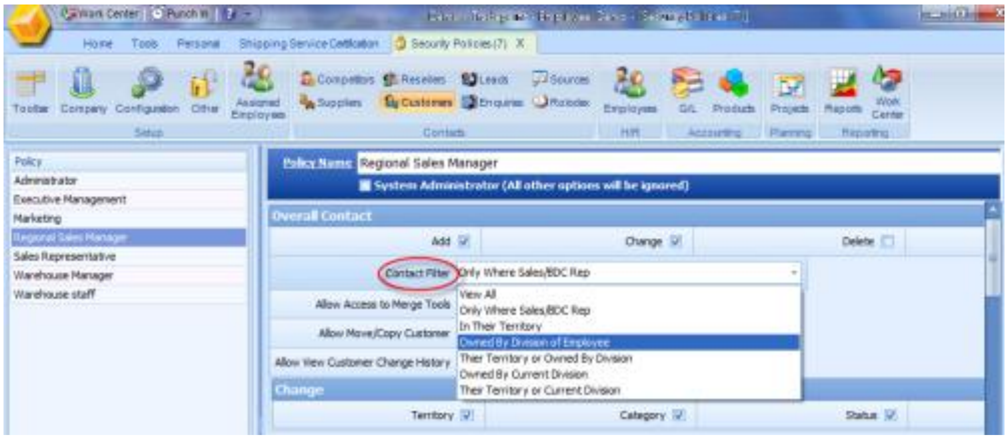
Resellers

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.

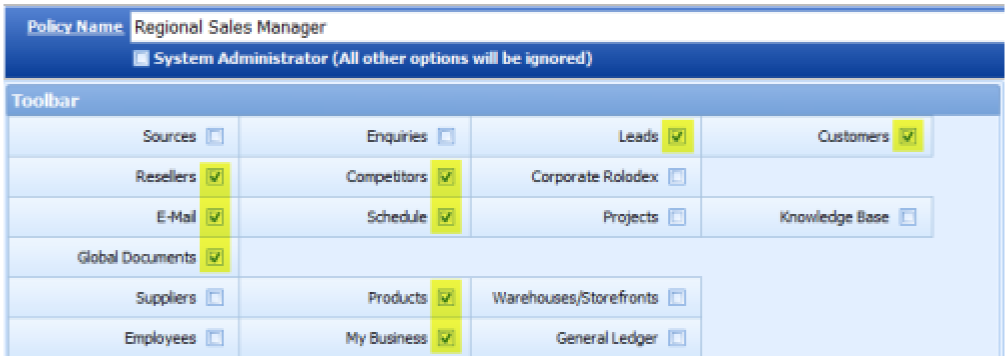
Owned by Current Division – This option will allow Customers to be accessible only by the assigned current Division of the Employee, overriding other options like territory.

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

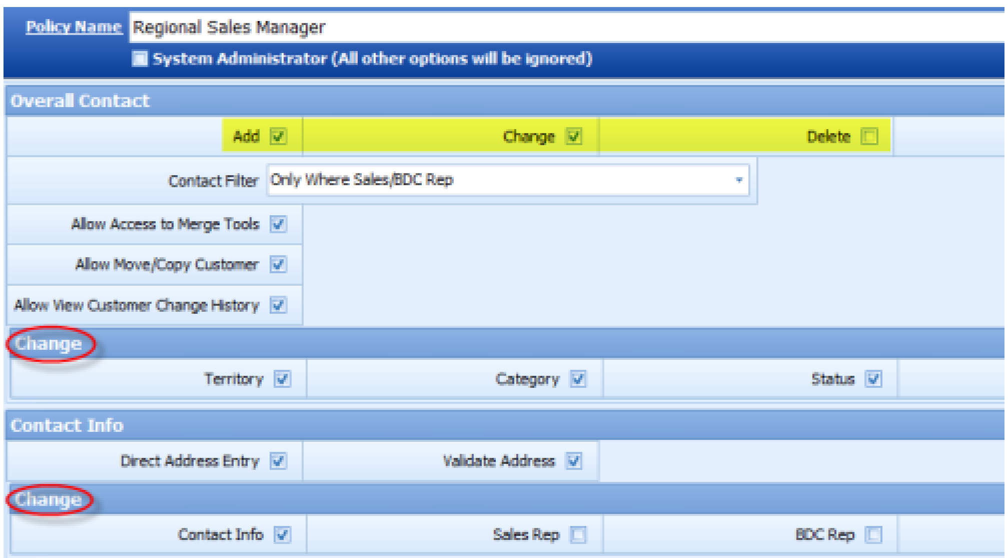
Functions – Options for Information

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

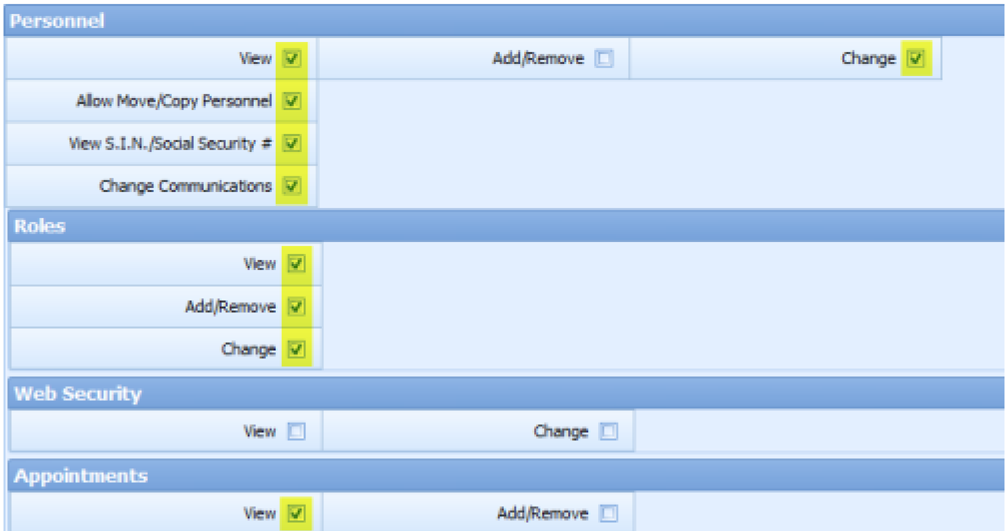
The ability to Add, Change, Delete, or Print out a Customer Contact.



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.

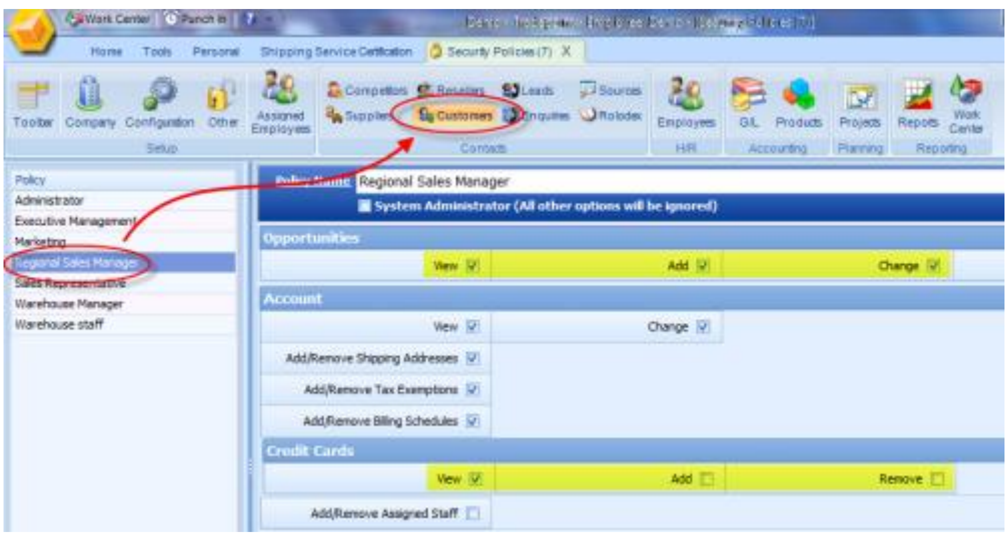


For personnel information within a business contact there is the ability to view, add, edit, change, and remove different items within personnel.



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

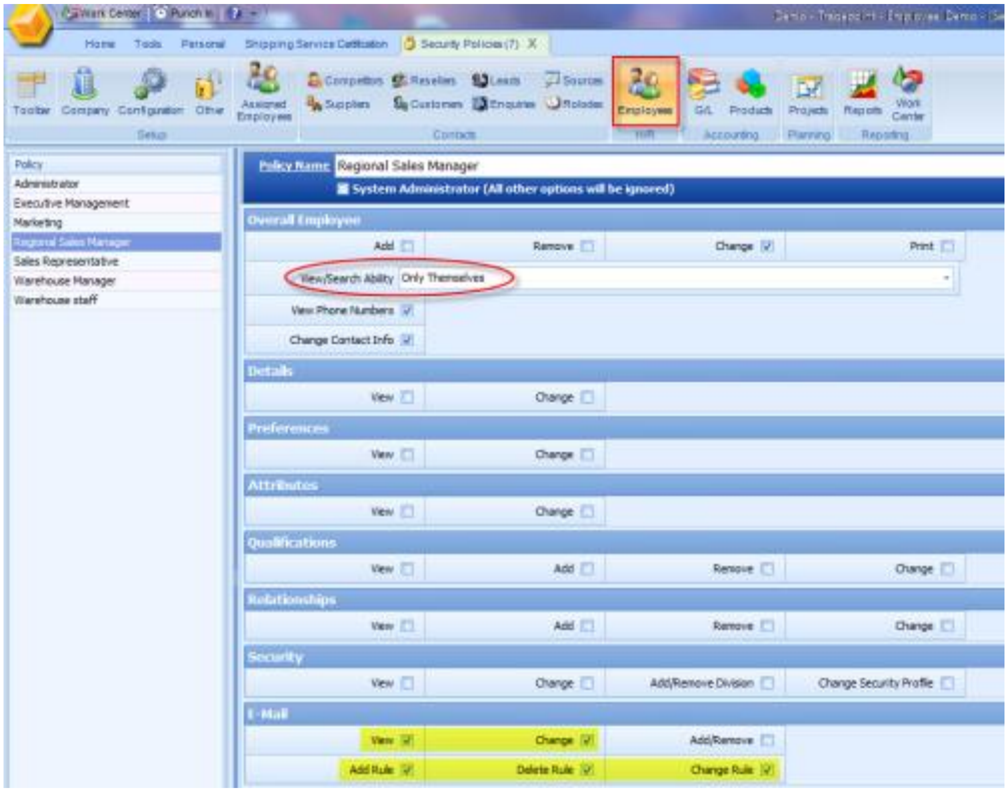
This is ideal to enable and separate out functions for different groups such as sales and customer service roles to be able to perform specific actions but also ideal for Accounting folks to be able to complete and edit items as necessary.



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.

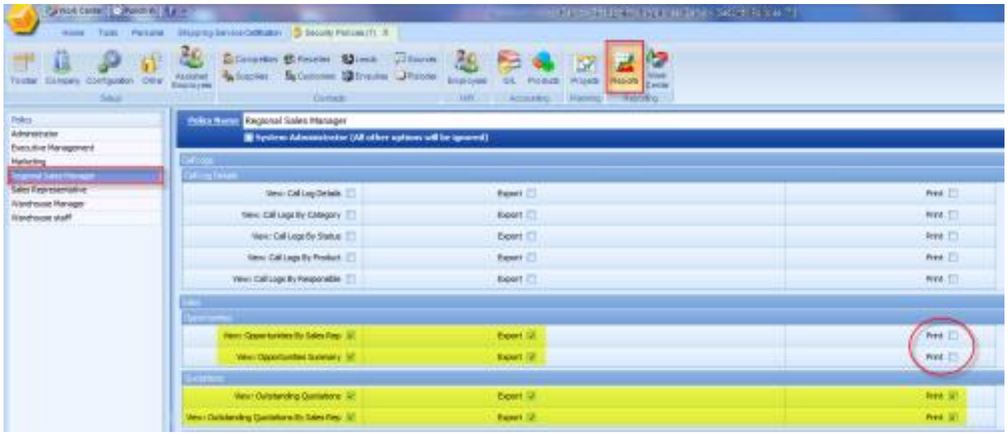
Employee Access – Reporting Options

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



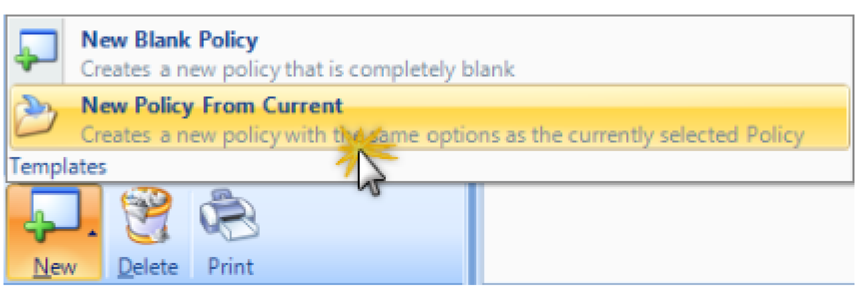
Enabling reports does entail going through each section of reports and checking off each option, at least one time for one profile. After one profile has been created the option for creating a new profile from an existing security profile will shorten the setup time considerably.

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.

Individual Specific Tools & Features

Personal Tab

Each profile within Tradepoint has its own set of tools specific to each profile. The Personal Tab is specific to each login within Tradepoint.

- Change a Password
- Rolodex
- Password Manager
- Preferences
- Time Sheet Tool
- Expense Report

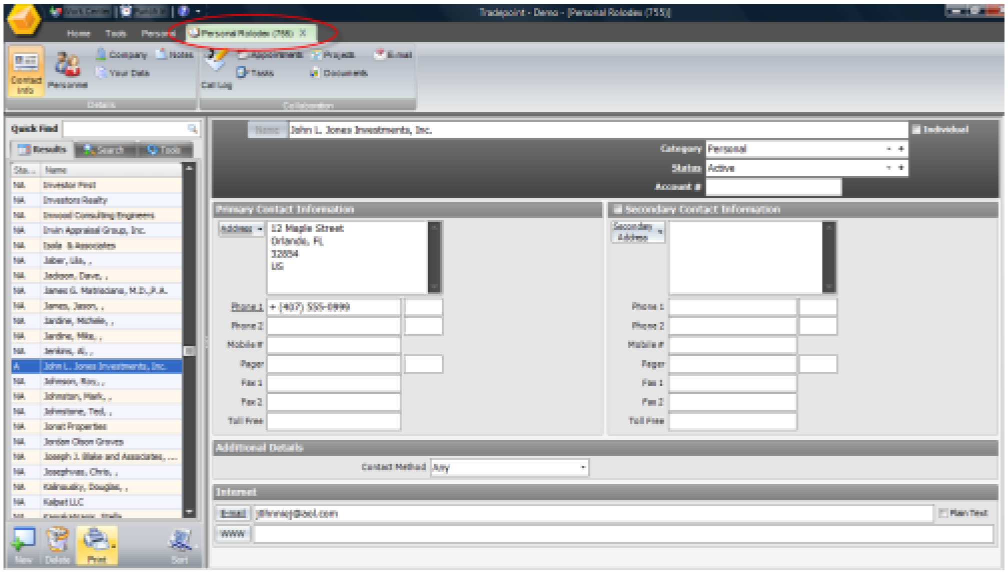
Change Password

Changing a password in Tradepoint is simple enough. The Change Password option brings up this screen to change an existing password.

Once the Save icon is clicked the new password will go into effect.

Personal Rolodex

The Personal Rolodex will have the same contact structure as any other Contact type within Tradepoint. The main difference is this will be specific to an individual and not accessible to other users within Tradepoint.



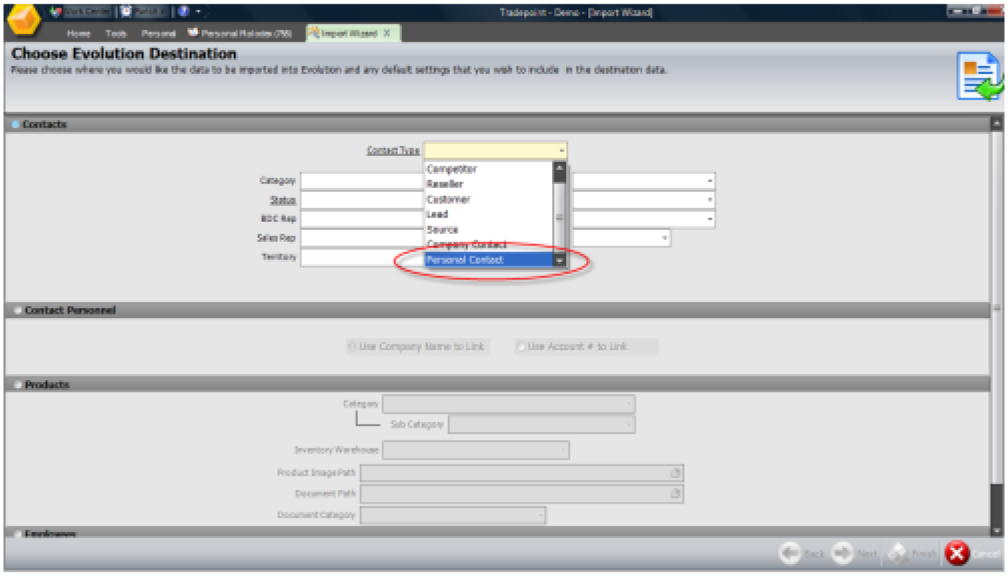
The Personal Rolodex has all of the CRM features which are available to other contact types in Tradepoint. Primary CRM functions include:

- Advanced Search Tool
- Mass Email Wizard
- Mail Merge Tool
- Move and Copy Tool
- Quick Report options for printing labels, envelopes and contact lists
- Support for B2B and B2C Contact structure
- The ability to push Personal Contacts to a Smart Phone, Blackberry or iPhone

Importing Contacts into the Personal Rolodex

Importing contacts into the Personal Rolodex follows the same steps as importing contacts into any other contact type in Tradepoint. ***The person doing the data importing must be logged in as that specific individual to access a particular Personal Rolodex for a data import.***

Once logged in under a specific profile for a data import the option to choose within the Data Import tool is on the screen shown below in the data import tool.

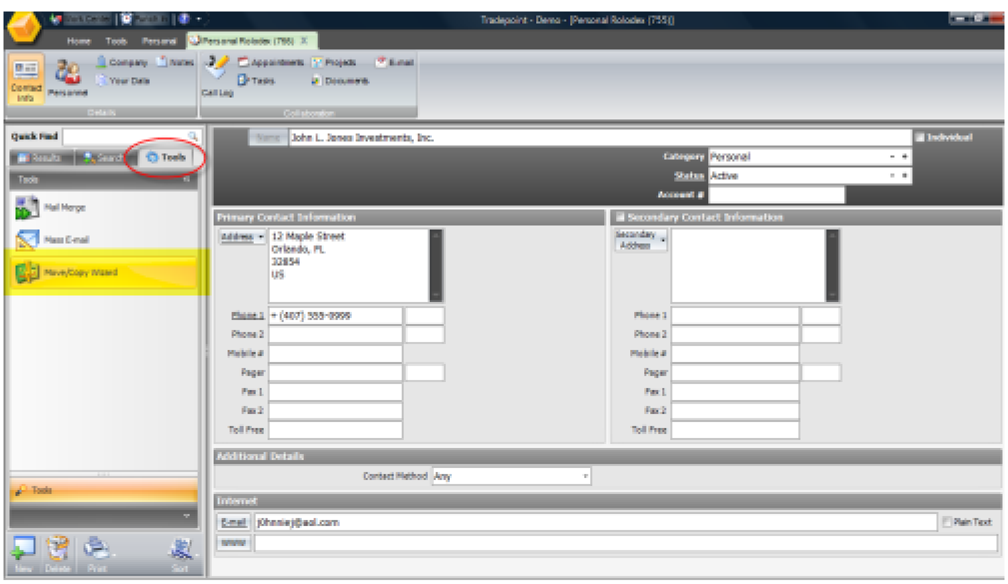


Once the option for Personal Contacts is chosen then specify any additional information such as category, statuses, shown in the fields behind the drop down menu and click the Next option when ready to map the fields from your file into the Personal Rolodex.

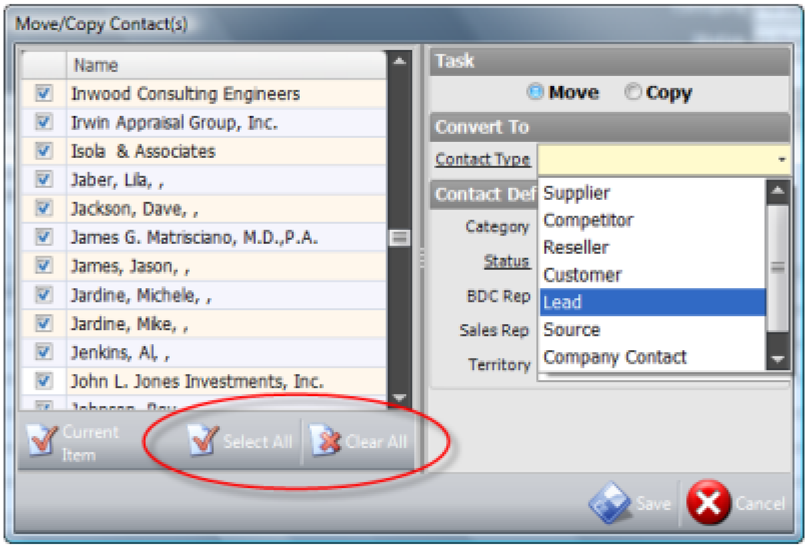
Once the mapping is done the Next option will import your contacts into the Personal Rolodex for a specific profile.

Moving Contacts out of the Personal Rolodex

Moving contacts out of the Personal Rolodex can be done with the Move and Copy Tool found under the Tools Tab within the Advanced Search Tool on the left of the Contact screen.



Clicking the Move and Copy Tool option will open the menu to choose which Personal Contacts you would like to move, where and how your contacts will be categorized.



Contacts on the left will be pulled from search results within the Personal Rolodex. So, if all the contacts were opened in the personal rolodex then all the contacts will show up in the left of the Move and Copy Tool. Narrowing down search results will also narrow down the contacts to be moved.

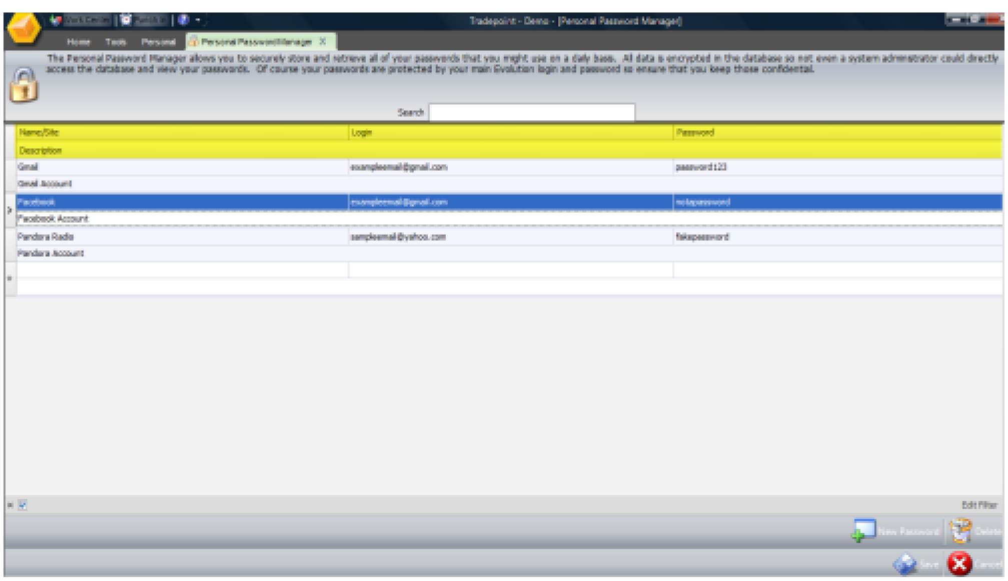
Options to Select All, Select specific contacts and Clear All are available.

Click the Save icon when finished to Move contacts.

Password Manager

Tradepoint includes its own Password Manager which is ideal for passwords of all kinds. Most people have at least handful if not dozens of passwords for many things:

- Websites
- Software Applications
- Multiple email addresses
- Smartphones, Blackberries and iPhones



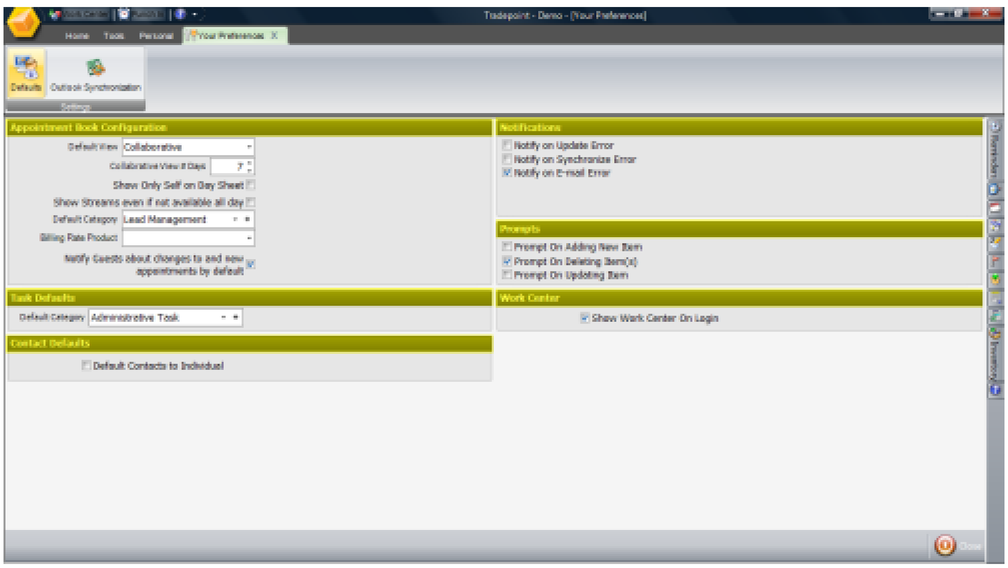
Tradepoint's password manager is ideal for all of these to have a secure place for multiple passwords. Any passwords stored here can *only* be viewed with a person's login.

User Preferences

User Preferences are available to modify individual usage settings within Tradepoint. Two sets of Preferences are available, defaults for general settings and Outlook Synchronization for different types of email and Exchange Server user preferences.

The Outlook Exchange Server settings only apply to companies actively using Exchange Server otherwise the Outlook Preferences would apply to most other users.

Defaults



Appointment Book Configuration

- Default View – This is the view visible when you check the schedule in Tradepoint
- Collaborative View # of Days – The default number of days visible in the Collaborative View
- Show only Self on Day sheet – View only your own schedule even if you can see others and vice-versa
- Show Streams even if not available all day – make sure others can see your schedule even if you have scheduled yourself to not be available or are scheduled to be on vacation
- Default Category – the default appointment category for each appointment started (ex. For sales people the default category could be 'sales Appt.')
- Billing Rate Product – This setting will add a Product/Service to any Invoices created from Appointments for a given profile. ***Different Employees can have different Products/Services set as default in the Schedule. Even though a specific product is set here any Invoices are editable once created.***
- Appointment Notifications – Automatically Notify Guests about new Appointments and changes to existing ones.

Task Defaults – This option will automatically set a default Task Category each time a Task is created and each time a Task is generated from an Email with the right-click option.

If this option is not set then Tasks won't be created from emails. ***A prompt will notify you of this from the right click option in Email if this is not setup for an Employee profile.***

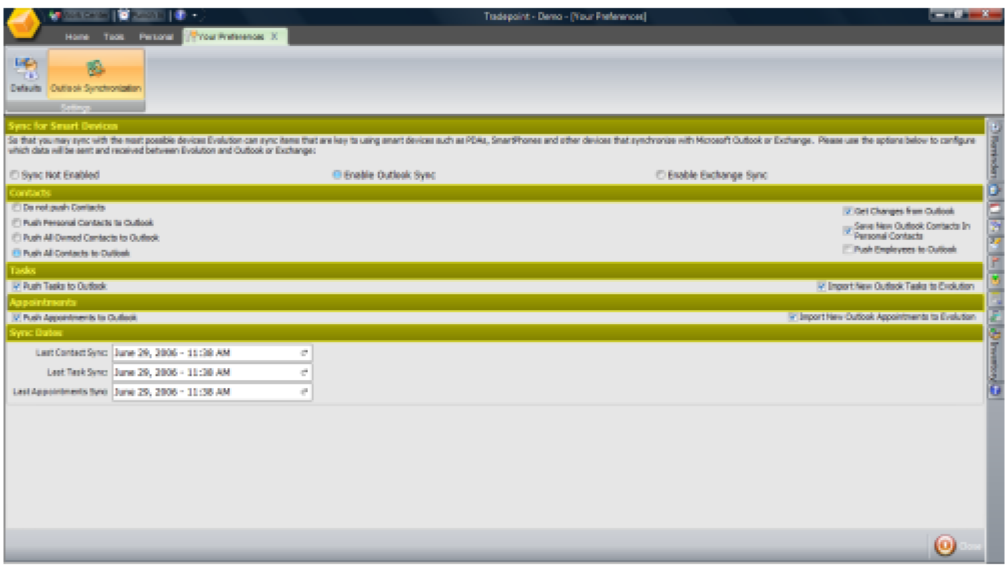
Contact Defaults – An option to make the default option in new contact to an individual rather than business contact. ***The default contact type in Tradepoint is a Business contact.***

Notifications – These notification will let you know if there are any errors for updates, email synchronization and downloads and notifications of synchronization errors. ***Most of the time the only notification necessary is the update error since an email error and synchronization error can be caused by internet time outs and network issues that do not have to do with Tradepoint's performance.***

Prompts – These preferences will pop up an alert when a new item (Product) is created, when a contact is updated and when a contact is deleted. ***In most cases the only relevant preference is upon deleting a Contact. Security profiles can also restrict editing and deleting for Products and Contact information.***

Work Center – This preference will automatically show the Work Center when a user logs into Tradepoint. ***If not set the Work Center icon in the upper left will have to be clicked to show the Work Center.***

Outlook Synchronization



Synch for Smart Devices – For people using SmartPhones, Blackberries and iPhones the option to synch email with Outlook is available for IMAP as well as Exchange Server. The option to disable Outlook synch is also available. ***Make sure your email account settings are setup with the correct IMAP or Exchange Server information.***

Contacts – Contact options for people using SmartPhones, Blackberries and iPhones specify how contacts are pushed from a device into Tradepoint and vice-versa

Tasks – Push and/or pull tasks back and forth from a device into Tradepoint.

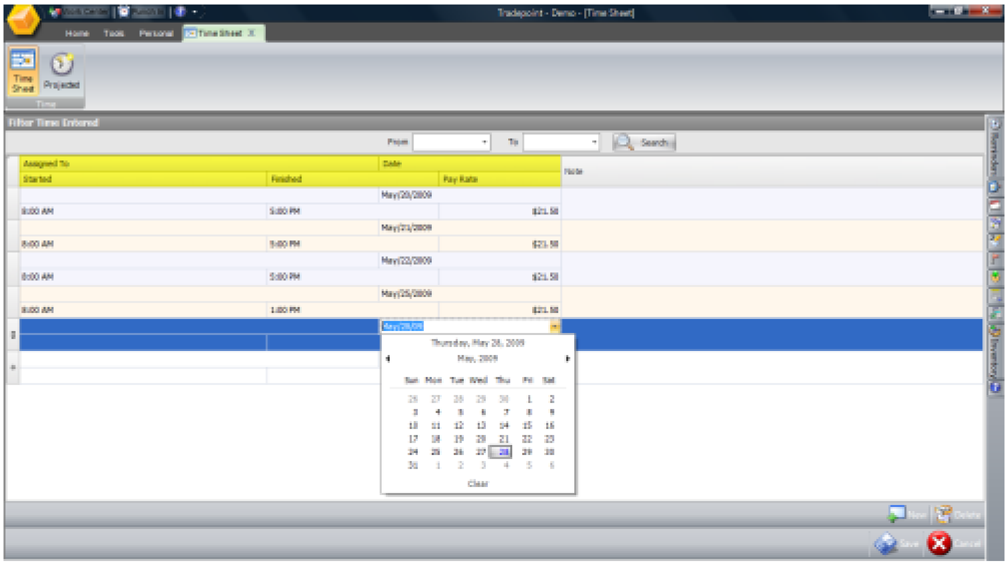
Appointments - Push and/or pull Appointments back and forth from a device into Tradepoint.

Synch Dates – These date fields will show the last dates when Tasks, Appointments and Contacts were synched with a device.

Time Sheets

Time sheets are preferences for users to add in time they have worked either in general or time worked on a specific project. Time sheets also allows users to track in hours they expect to work on projects but have not yet under the option for 'Projected' time.

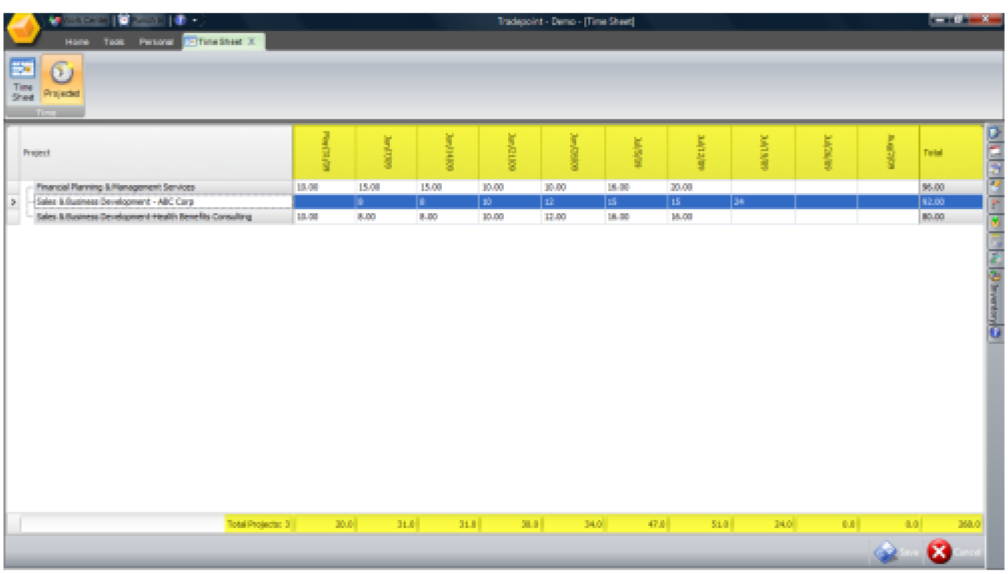
The main time sheets screen allows time to be entered in as it is worked by hand entering in the data and through the Punch Clock by punching In and Out. A project can be associated with any one set of hours worked through the "Assigned To' field in the time sheet.



A search tool exists for hours entered to be able to view hours entered that have been entered into Tradepoint.

Any hours entered and viewed in Tradepoint through the Time Sheets screen will be for the logged in user only. Hours entered in for other users can only be viewed through My Business Reporting.

Projected time is an option which will allow for planning when working on one or more projects over a time frame of approximately 30 days in advance.



The time entered in Projected time will appear within reports for projects which illustrates projected time versus actual time worked with respective dollars amounts based on the assigned value of the Employee's time within that project or overall. Projected time can be edited until the project is past due based on the due date of the project and the current date.

Projected time can only be entered in on projects that have current timelines or have not yet started. Any project with a due date past the current date cannot accept Projected time in this screen.

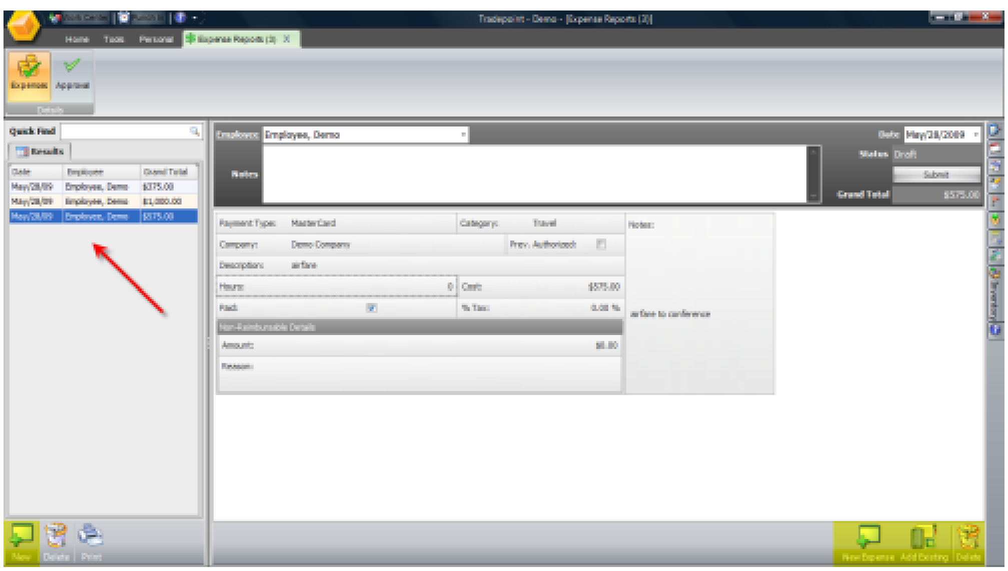
Expense Reports

Expense Reports is an option for Employees to enter in their Expenses based on what is accepted as legitimate Expenses within your organization. Expense Reports support entering in Expenses with details regarding:

- Payment method
- Expense amount
- Sales taxes
- Reason for expense
- Time involved
- Reasons for non-reimbursement of Expenses

The main screen for expenses under the Personal Tab will show all expenses that have been entered in through this login.

Existing expenses are listed off to the left with highlighted options at the bottom left for new expenses and editing current ones on the lower right.



To enter in a New Expense:

1. Click the new icon highlights in the lower left. A new expense will appear on the left of the screen.
2. The date will default to the current date in the upper right. Change it to accommodate a different date for an expense.
3. Click the New Expense icon on the lower right. The detailed screen will open for the details of the expense.
4. Click the 'Submit' icon in the upper right when finished.

Using Tradepoint

Management Menu

The Management Menu is found by clicking the cube icon in the upper left hand corner of your screen in Tradepoint. This contains the main tool for managing fundamental settings for synchronization, importing and exporting data database management and the setup & configure tool.

Like the rest of Tradepoint access to the management menu can be modified through security settings based on a person's role within your organization.

Each of the following sections will go through in detail the purpose and how each tool impacts your company's information.

Login/Logout

The Logout option is the option to logout of Tradepoint without shutting down entirely. This is ideal for logging into and out of more than one machine. This is also recommended for adding a new employee or changing settings within an employee profile for email and the schedule which does require you to login and logout for those changes to be acknowledged.

Synchronize

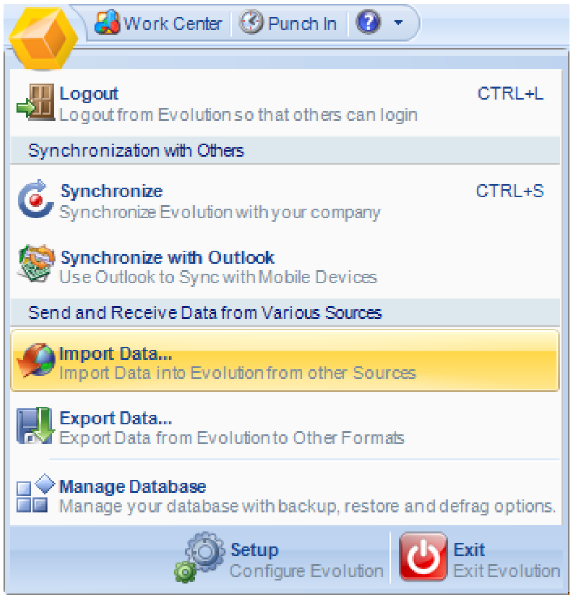
The Synchronize option can always be accessed through the management menu or by holding down the control key and hitting 'S' at the same time on your keyboard. This can be done at any time and is recommended if you have just uploaded documents or have made multiple changes that you would like your team to receive quickly.

Synchronize with Outlook

The Synchronize with Outlook option is for people who are using Outlook on a Blackberry or a Windows Mobile enabled device. Once the settings are established within your employee profile (within Tradepoint) and your settings are setup on your Blackberry or Windows Mobile device this option will synchronize with Outlook to push email through Tradepoint to your mobile device. More will be explained about this within email and the employees sections.

Import Data Tool

Importing your Data can be done using the Data Import tool found in the Management tool in the Upper left hand corner of your screen.



Tradepoint currently supports Data Imports in over 12 different file types including Quickbooks, Goldmine, Act, Peachtree, Excel and others.

The wizard built into the Data Import tool will walk you through the steps to Import your Data with each different file type you are able to Import. Prepare your Data file before you attempt to Import it. A few tips of how to look out for in preparing your data includes:

- leave no spaces between Rows or Columns of data
- clearly label header fields
- do any clean up for your data ahead of time(spelling errors, formatting, etc.)

We do caution clients who may not have a full time IT professional assisting with their IT structure or who manages their corporate information simply because sometimes data may contain corrupt files or may not Import as cleanly as originally thought.

When you follow the prompts a wizard will load that walks you through what type of data you would like to import and where you would like to put that information into Tradepoint. Depending on the import Tradepoint may ask you to "map" your old data fields into your new Tradepoint system.

Tradepoint can Import over a dozen types of data including:

- Act 2006 or Later
- Tradepoint Email Backup
- Fox Pro/dBase (DBF)
- CWR Electronics Data
- Goldmine 4.0 or Later
- MS Access
- MS Excel
- MS Outlook Email
- MS SQL Server
- ODBC Data Source
- Oracle (Experimental)
- Peachtree
- Quickbook Lists

- Text Files

If you do not see a specific data type mentioned in the "Import Data" list Tradepoint will most likely be able to import the data already. Most applications allow export to "comma delimited" "tab delimited" or even Access and Excel files.

Tradepoint can import data from any of these file formats an bring validated information directly into the software. If for some reason the old software application you used to use does not allow any of these export types, our development teams have most likely already created a plug in that can import your specific data.

Importing your General Ledger into Tradepoint

Importing your existing General Ledger structure into Tradepoint will depend primarily on what Accounting software you are currently using. Some Accounting/ERP applications will not allow you to export your data. For example, Simply Accounting is one that does not permit access to your G/L file.

If you have been using Quickbooks we do have a tool built into Tradepoint that will enable you to Import your existing General Ledger structure into Tradepoint through the Import Tool found in the Management Menu.

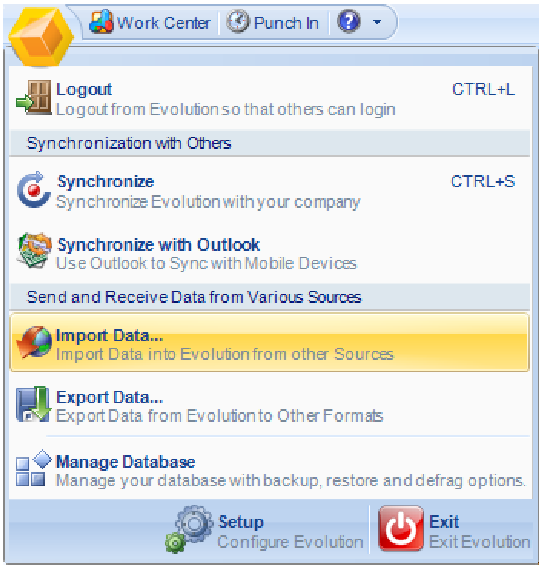
There are a few things to remember about Importing an existing General Ledger from another software application:

1. We recommend you consult and IT professional or one of our Programmers about the application you are using and the condition of the data before any Import is done.
2. Even with a clean data set there may still be minor errors in the Import process so be sure to check your General Ledger structure after the Import has been completed.
3. if you are looking to make any adjustments in your G/L structure this may be an ideal time to consider that. Please consult with your Accountant about this if you think adjustments should be made.
4. Be sure to have at least a minimal set of Categories and related Statuses set up in Tradepoint before you Import your data so that a destination with data preferences can be assigned instead of assigning the Category/Status manually to each file entry.

To Import your General Ledger from Quickbooks follow the steps outlined below.

1. Prepare your IIF file from within Quickbooks and save it in an easily accessible location on your computer.
2. From within Tradepoint click on the Management Menu (The icon in the upper left hand corner of your screen) and choose the Import Data option.
3. Follow the prompts on the screens and choose your file type. in case of the Quickbooks example choose the IIF file option.
4. Follow the next few screens to find your file and specify the destination, including the Warehouse (which you will need to have setup ahead of time.
5. Check your data after the Import and make any necessary adjustments to your G/L structure using the edit tools in the Company Settings accessible from the Tools tab.

First, if your company is currently using an Accounting Program then we would recommend using the Import Tool found in the management Menu of Tradepoint accessible through the icon in the Upper left hand corner of Tradepoint. Second, if you use an Accountant we do recommend consulting with your Accountant to ensure accuracy.



Tradepoint can import 14 different file types with the Data Import wizard including the following Accounting software file types:

- Goldmine 4.0 or later
- Peachtree
- Quickbooks IIF Files

Follow the prompts in the Data Import wizard and the structure and information for your General Ledger will be imported into Tradepoint.

Additional methods available for setting up your General Ledger include a customized data import which can be created specifically for your company or you may use the tools within the company resources to set up your General ledger directly in Tradepoint.

Importing ACT Data into Tradepoint

You will need the ACT database files, version 2006 or later, also the ACT2005 (demo version is fine) and the Act Import Plug-in. Some versions of ACT do not have the plug-in so check to be sure.

1. Load in the database in Act 2005 or later (it will convert old versions) by choosing open and choose the old database file (.dbf)
2. Once it's done converting, go to your Services and stop the MSSQLServer$ACT7 instance.
3. Copy out the database file
4. Attach it to your database server.
5. Attach client's Tradepoint database to your server.
6. Run Tradepoint
7. Select the ACT import and give it the place to find the ACT database and then choose the contact type (the two check boxes don't do anything)
8. Watch as it imports.
9. Clean up any duplicates if you can. I would create a script to allows you to move Support and Personnel from one contact to another to clean up the duplicates.

What files make up the ACT database: http://itdomino.act.com/act.nsf/docid/2001626143542 (essentially any file with the same name as the .DBF file)

Exporting Data

Tradepoint has numerous built in tools for exporting data including reports, backup files and extracting data with the option to export a report as a number of different file types. These types include:

- PDF
- Excel
- HTML
- Plain Text
- CSV - Comma Separated Value
- RTF - Rich Text Format that can be opened with numerous Word based applications

Tradepoint has an option for exporting your email file into a compressed format that can be exported into other Email applications at a later date found under the Export Data option under the management Menu.

At any time we can also provide a CSV file or other file type of your entire data set upon request.

Manage Database

From the Management Menu is the 'Manage Database' option. This includes several options for you to manage your database with the database management tools. For companies who are using our hosting services regular backups are performed for you though you will still have the option of creating and storing your own backups as you feel necessary.

Tradepoint includes 4 different database operations that you can perform using this tool.

- Backup Database
- Create a New Remote User backup set
- Restore your Database
- Defragment a database

Follow the prompts on the screens to perform any of these functions to maximize your database performance.

The defragment option is similar to the defragment option you have on your PC. Choosing this option will compress and clean the data set you have residing on your machine. Depending on how much data you have will depend on how long this takes.

Setup & Configure Tool

Tradepoint provides you with one tool to be able to setup and configure all of your settings, categories, statuses, methods, services and system management tools from one interface.

Since your business needs the ability to change and grow the ability to adjust those settings on a case by case basis if necessary. Further, the Setup and Configure tool can be accessed through the main interface found within the management menu as shown in Image A below or it can be accessed through a number of access points found anywhere you see a blue plus button next to a field as shown in Image B.

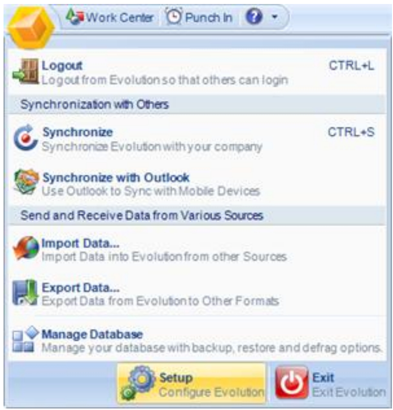


Image A.

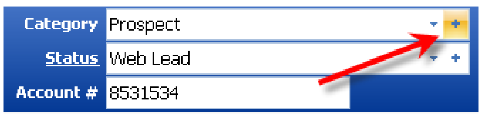


Image B.

The Setup and Configure Tool is managed by the Security Settings so, providing a safety net so your settings don't get deleted accidentally and to keep your process definition focused by allowing access to specific individuals within your business.

Prompts are built into the Setup and Configure Tool for making adjustments within a system that has been configured so you know what the consequences will be for the decisions you make before you make them. Just a few of those scenarios include:

- Consequences to deleting a Category when there are Contacts assigned to it.
- The option to reassign existing Contacts to another Category before the category is deleted.
- A prompt to inform you that you are about to delete or change a Category before it is deleted.

Some of the most frequently used functionality that can be customized using the Setup and configure tool includes:

- Categories
- Statuses
- Order, Invoice, and Purchase Order Numbers
- Shipping Methods
- Shipping Services (relevant if you use real time shipping modules from a carrier)
- Shipping Rate Tables (an offline alternative to real time shipping rates)
- Payment Methods
- Payment Services (relevant if you use payment services through your website i.e. Authorize.net)
- Refund Types
- Custom Data Fields
- Geographic Sales Territories
- Communications (Newsletters, Promotional Materials, etc.)
- Event Management (Automated Tasks, Emails, etc. based on your workflow needs)

General navigation tools available within the Setup and Configure Tool will be consistent within each section of the tool as shown below in Image C.

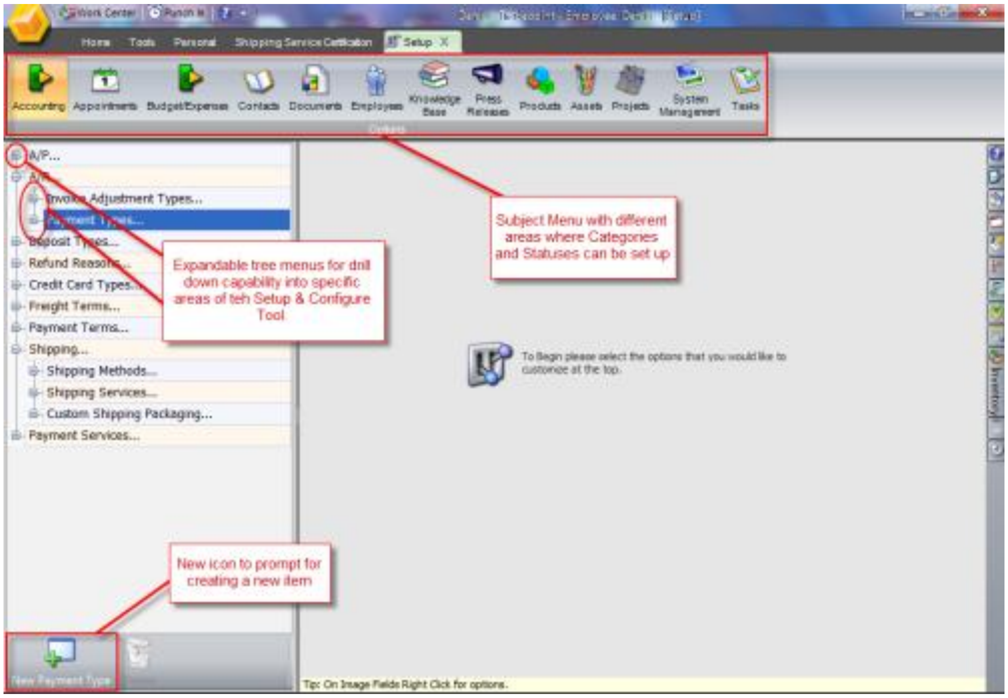


Image C.

Each screen will reflect the layout and navigational tools. Further, as you open each window any additional fields necessary to fill out will open as you progress through the Setup and Configure Tool.

The Setup and Configure chapters of the Product Manual will explain in detail each section within Tradepoint that can be customized using the Setup and Configure Tool and what information is necessary within each section.

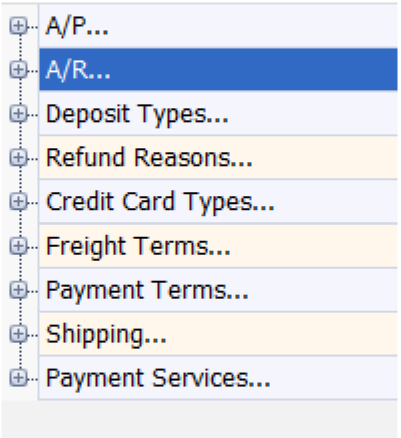
Accounting

Accounting Configuration tools encompass Categories related to transaction types, setup for automated processes including payment and Shipping Services and additional tools. This chapter will address each of the Setup and Configure tools in detail.

The accounting preferences are located within the first icon on your screen from left to right. Within the Accounting section you have the tools to add and customizes preferences including:

- Payment and Deposit Types
- Credit Card and additional Payment preferences
- Shipping Methods and Services
- Payment Services including Ecommerce payments systems
- Categories and Preferences for Accounts Receivable and Accounts Payable

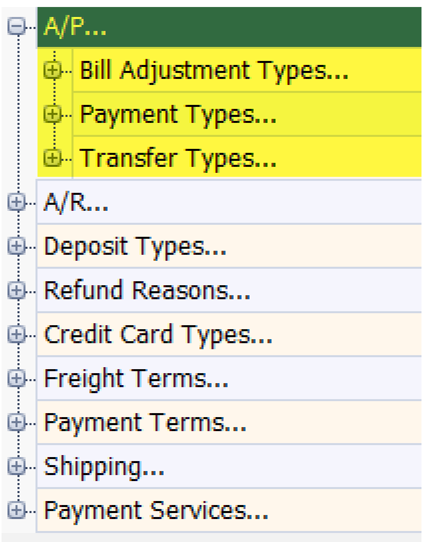
Accounting includes a number of sections that will need to be Setup for you to use Tradepoint to its fullest capacity. The image below shows the areas within Accounting that will require configuration.



Once the Setup and Configuration for your Accounting processes has been Setup you will have your transactions happen automatically as you run your business.

Accounts Payable

The Accounts Payable setup and configure tools are illustrated below.



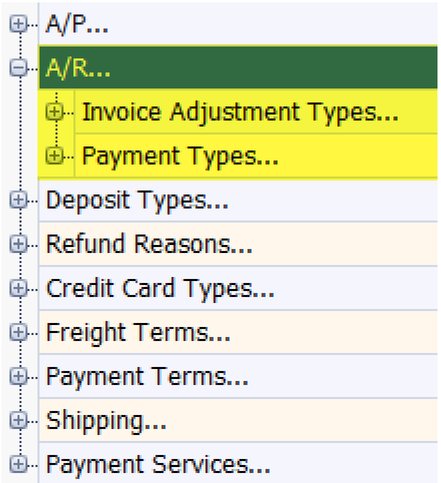
Bill Adjustment Types - Bill adjustment types will enable Categories within the drop down tab of the field for Bill Adjustments. Each Bill Adjustment Type you create here will then appear within the drop down field for Bill Adjustments.

Payment Types - Payment Types will pre-populate the drop down menu for the screen for Payments on Invoices and Orders.

Transfer Types - Transfer Types will pre-populate the screen for Transfers within your General Ledger. When a Transfer is chosen you will have different types of Transfer entries that you be able to make within the General Ledger based on the Transfer types you create within the Setup and Configure Tool.

Accounts Receivable

Accounts Receivable Configuration is illustrated in the example below.



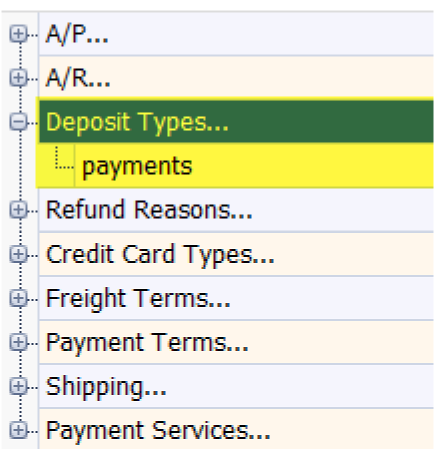
Invoice Adjustment Types - The Invoice adjustment types option will show up within Invoices for the drop down menu for Adjustments.

Payment Types - Your Orders and Invoices will bring up the options you setup for Payment types within the Setup and Configure tool.

Note: Even if you setup all of your preference within the Setup and Configure Tool directly here you will have the option of adding to any field where you see the Blue Plus.

Deposit Types

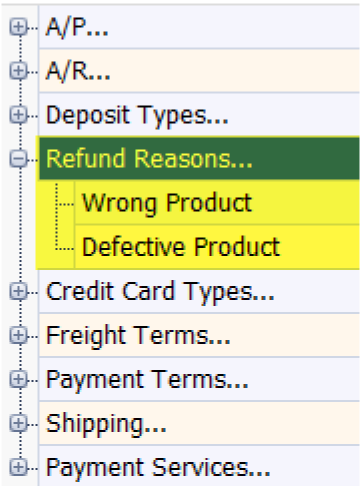
Deposit Types are accessible through a drop down tool each time a Deposit is made through the General Ledger.



The example image above shows 1 example of different deposit types. A Deposit Type will be selected for each Deposit. Creating a new Deposit Type can be done through the new icon in the lower left corner of the Setup and Configure Tool or through the Blue Plus in the Deposit type field within your General Ledger.

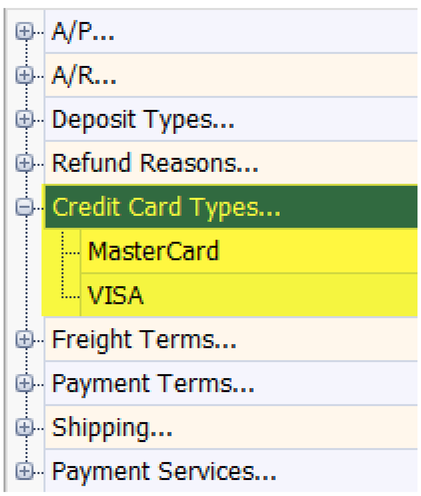
Refund Reasons

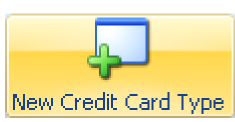
Refund Reasons defines the type of Refund you will need to account for within any RMA processes you may have in. The image below shows a few examples of Refund Types. The Setup and Configure Tool will allow you to add numerous types of Refund reasons if need be.



Credit Card Types

Credit card types allow you to add new credit card types which will flow through to Invoice and Order payment options within the drop down menu of the payment screen or either of those functions.

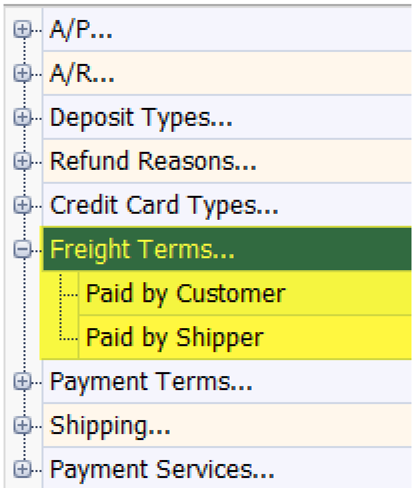


Clicking the new Credit Card Type icon 

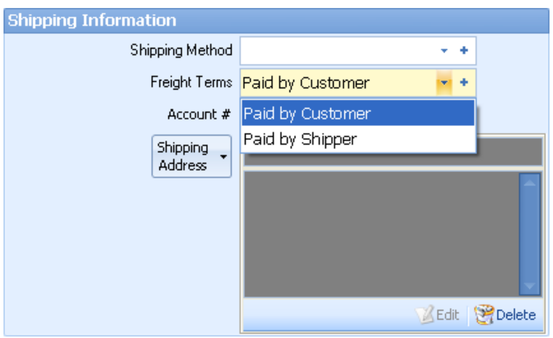
in the lower left corner will open the window to specify the Type of Card, number of Digits on the card and the number of digits for the Security Code on the back of the card.

Freight Terms

Settings for Freight Terms are established within this section of the Setup and Configure Tool. Two examples of freight terms are shown below.

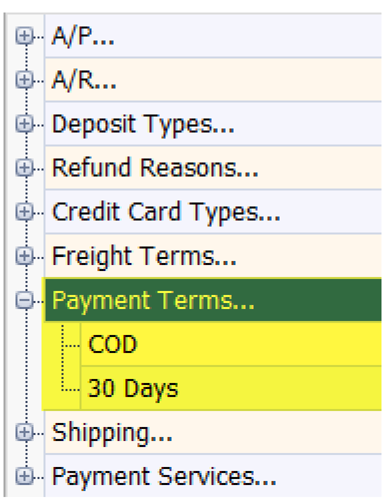


Freight Terms will show up as drop down menu items for fields located within the Account section of a Customer, Reseller, or Supplier as an Account preference within a Customer, Reseller, or Supplier.

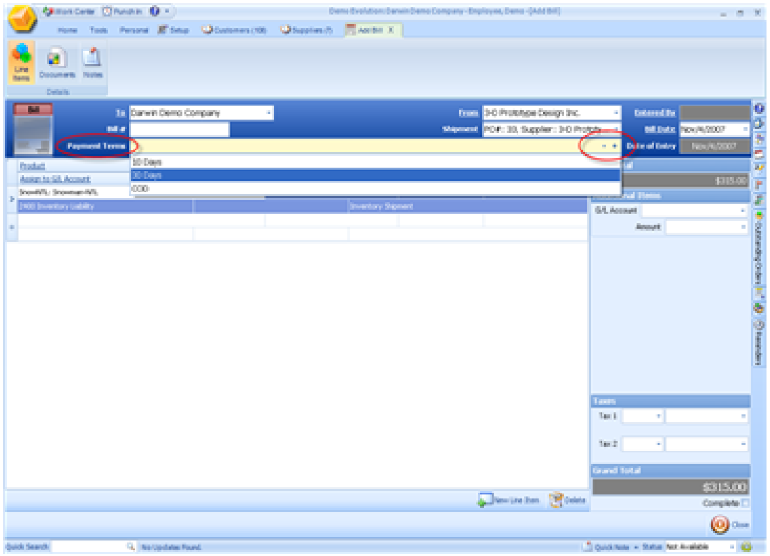


Payment Terms

Payment terms is the preference that is setup in this section which in turn will become a drop down menu option within Bills. This option is customizable through the Setup and Configure tool directly or through the blue plus found within the Bill window.



The view of Payment terms in the drop down menu shown in a Bill below.

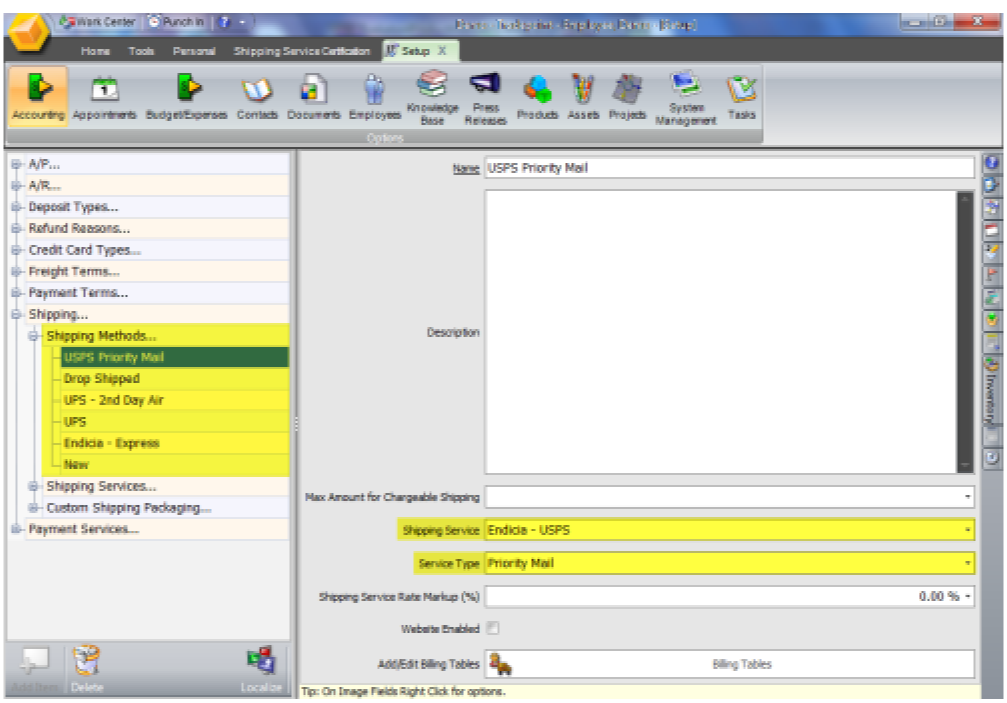


Shipping

The Setup and Configure Tool includes preferences for live shipping modules and related preferences as well as shipping tables for shipping rates that can be created should you lose your Internet connection for any length of time.

The Shipping sub-section of the Setup and Configure Tool includes two sections to be configured to setup your shipping methods and shipping services.

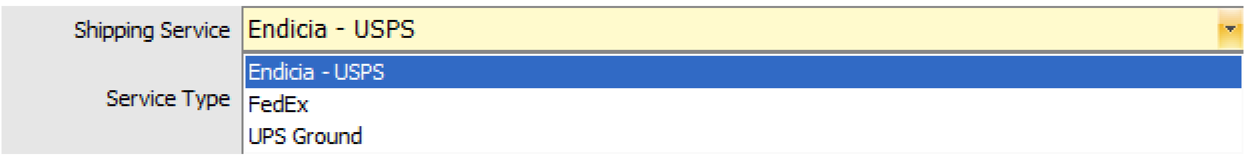
Shipping Methods: This will allow you to configure a live shipping module as well as related preferences. Shipping Services will need to be setup before corresponding Shipping methods can be enabled.



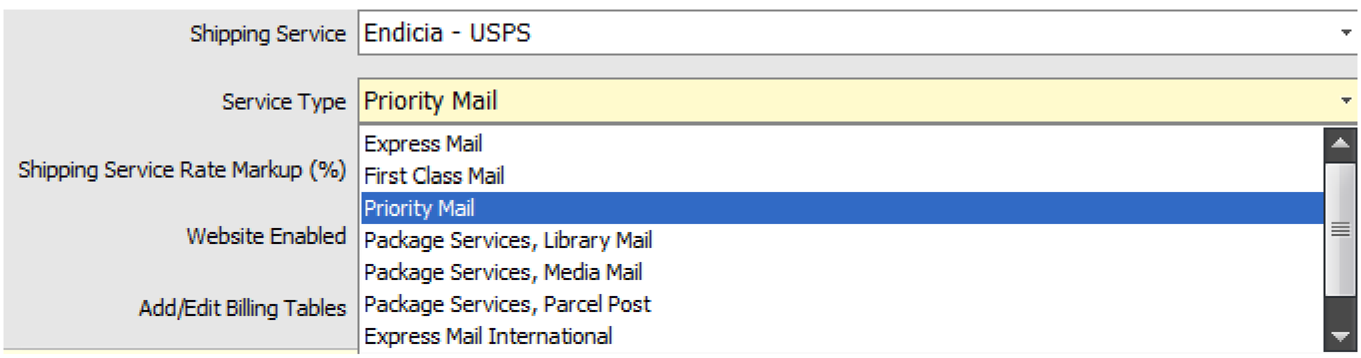
This example shows several existing shipping methods and individual preferences related to your shipping method on the right of the screen view.

Max Amount for Chargeable Shipping - The max amount for chargeable shipping Preference allows you to provide free shipping for Orders higher than a specific amount. The example above shows that all orders up to $350 will be charged shipping and anything above that amount will be Free Shipping. When this preference is set all Orders past that amount will not be charged Shipping. This setting will have to be set with all shipping carriers you have setup within your Tradepoint.

Shipping Service - This is the live shipping service you have set up within your Shipping Services. When you setup your Account information for the live shipping service (with your login and password) the live shipping Service will pull the live shipping data specific to your Account into each Order and/or Invoice. The drop down menu here will show the live shipping modules available within Tradepoint. Choose the one that corresponds to this Shipping Method you have created.



Service Type - The service type include a drop down menu of all of the service types provided by that carrier. Choose one for this Shipping Method that you have created. In the case shown below multiple shipping services are available to you.



If you use multiple shipping services for one carrier you will need to setup and configure each shipping service within a shipping method. In the case shown above all the available shipping services offered by UPS are available within this drop down menu shown in the image above.

<u>Note</u>*: If you use UPS Overnight Air, Two Day and Three Day Service you will need to have a shipping method configured for each of those Services. The result will be seen in Orders where the customer preference will be picked up automatically within their Orders if the preferred shipping has been specified within their Account or when if they became a customer through the web portal.*

Shipping Service Rate Markup - This is a markup that can beaded to your shipping to cover and handling fees. If there is any percentage specified within this field then all Orders for this Shipping Method will automatically have the increase in price added to the overall shipping cost.

Add/Edit Shipping Billing Tables - Should you lose your Internet connection and are unable to receive live shipping data you have shipping billing tables that can be added to provide shipping rates based on weight and destination. Most commercial carriers provide online shipping tables for each of the services they offer. The example shown below is an example to illustrate the functionality of the shipping billing tables.

Name	Location	Weight Min	Weight Max	Cost	Customer Cost
0-3 lbs.	Country	0	48	$0.00	$8.20
3-5 lbs.	Country	49	80	$0.00	$12.55
5-7 lbs.	Country	81	112	$0.00	$16.89
7-9 lbs.	Country	113	144	$0.00	$21.55
9-11 lbs.	Country	145	176	$0.00	$25.59
11-13 lbs.	Country	177	208	$0.00	$29.25
13-15 lbs.	Country	209	240	$0.00	$36.20
15-17 lbs.	Country	241	272	$0.00	$42.40
17-19 lbs.	Country	273	304	$0.00	$49.10

This table has to be manually entered based on information available from the different carriers. A few things to remember about this table structure:

- The name field designates the weight range. This can be different from a table provided by your shipper for smaller (and as a result more accurate weight ranges) weight ranges. If you choose a different weight range than what your carrier provides you will have to calculate the Min and Max weight.
- The Location field provides options for destination. The other choices include City, Province/State and International. If the carrier uses ranges (most do) then choose the National setting and one of the higher ranges for more accurate approximation for your tables.
- Weight Min/Weight Max will be the increment of weight for the range in a field. The example above shows Pounds and the Weight Min/Weight Max broken down into ounces for more accuracy. These fields have built in calculators that will allow you to use the mouse or the keypad on a keyboard to perform calculations.
- The Cost (to you) field in most cases will be blank since shipping is something that is paid for after the fact.
- The Customer Cost field will be the cost to the customer. This will pre-populate in the Order or Invoice based on the weights attached to your Products from your Inventory and will be generated automatically should you not have an Internet connection for live shipping data.

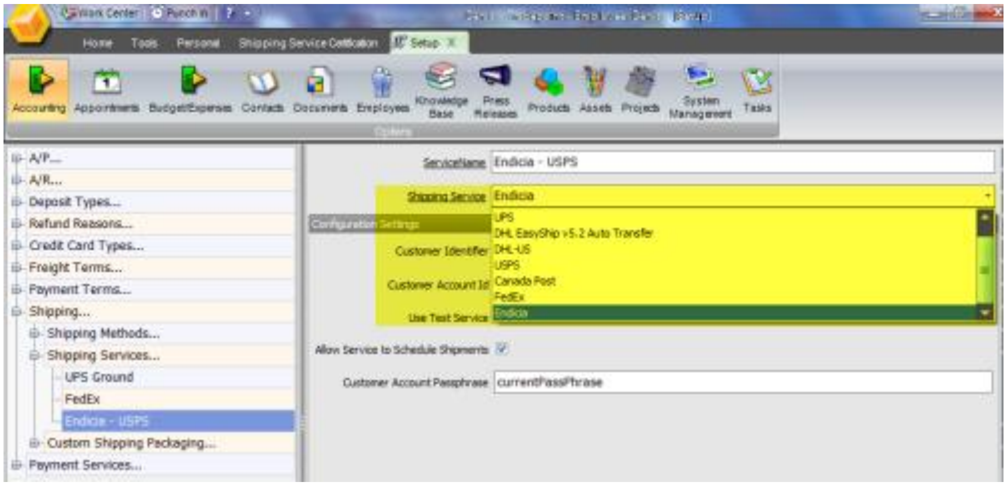
Save your changes when you are done. Otherwise all the data that was just entered will be lost and have to be re-entered again.

***Note* - Shipping billing tables are OPTIONAL and not required. It is designed to be a fail safe for automated live Shipping tools or is designed to be a manual shipping process for businesses that are service oriented or who do very little shipping.**

Shipping Services

Shipping services works in conjunction with Shipping Methods. The shipping Services will specify the details of the electronic Shipping Services you require while the Shipping method will include details about your overall Shipping needs and not just the configuration for the electronic component for the live shipping.

The image below shows an example of one automatic shipping option. Depending on the requirements of the carrier the fields may vary somewhat.



The Carrier's Server information will be pre-configured into some of the fields and you will have to enter in any login and password information necessary to access your specific shipping information for that carrier.

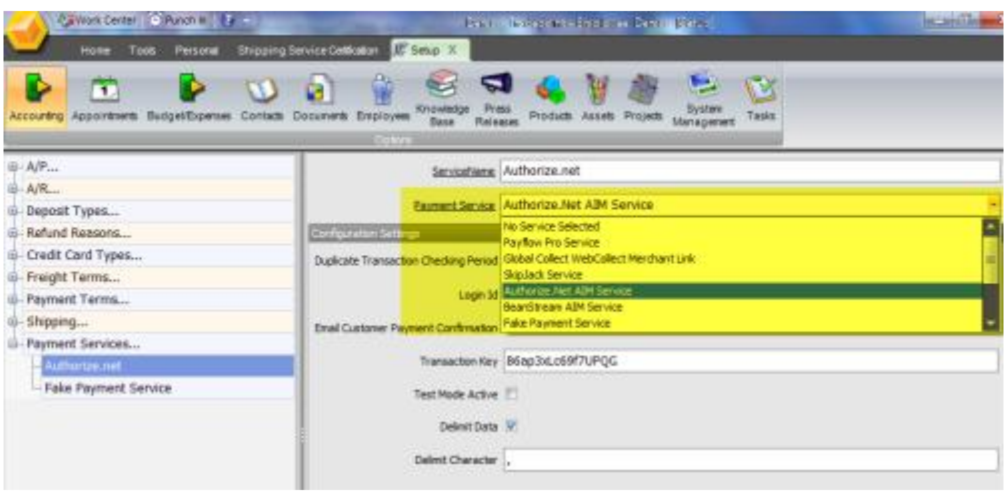
When you have entered your Account login information your changes will be saved automatically. Now whenever this shipper is specified or if this Shipper is the default then the rate will be generated automatically based on your preferences setup within the Setup and Configure Tool.

When you close the Setup and Configure window your changes will be automatically saved.

Payment Services

This is where your settings (login information, etc.) for your electronic or web payments are entered into Tradepoint. Once this is entered here then electronic payments are processed based on the preferences set within the Setup and Configure Tool.

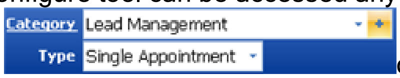
Your established preferences will flow through to the respective screens for web and phone based Orders, and the result will be the functionality for your electronic payments will become active.



The example above shows a basic field set for Authorize.net. This structure allows for a test mode to test out your payment system before you go live and will also be controlled by security settings for after you go live.

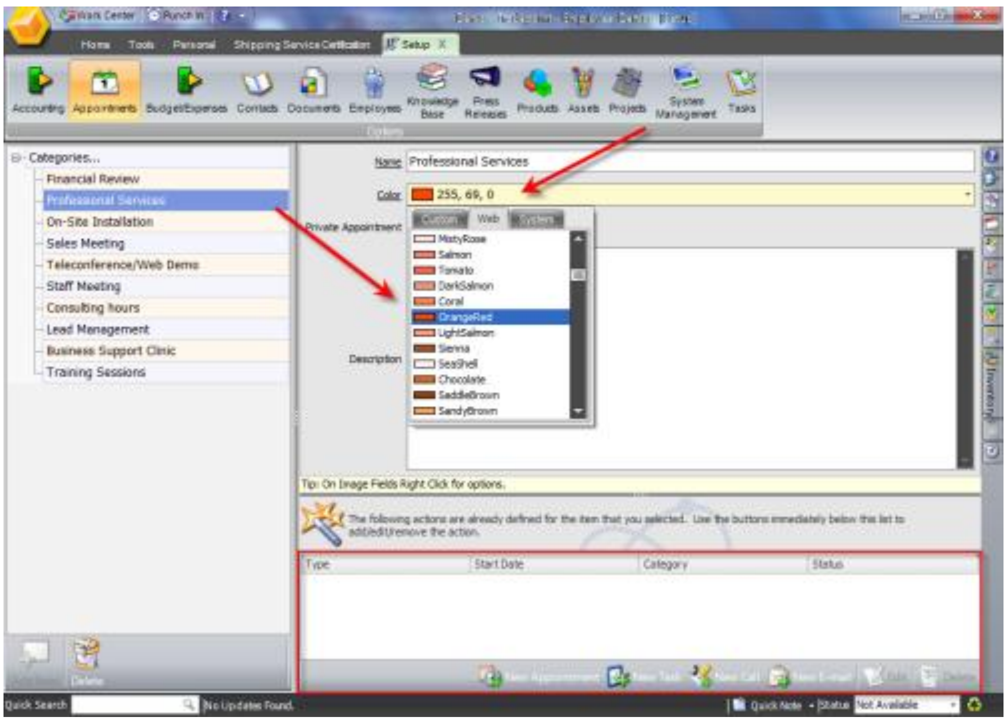
When all of your payment services have been established you will have these options show up within the Payment Information section within Orders as a part of the drop down menus available for taking orders and will also appear automatically within your Ecommerce module for any online transactions.

Appointments

Appointments within the Setup & Configure tool can be accessed anywhere within the Appointment screen you see the blue plus next to the Category field 

or directly through the Setup & Configure tool found under the Management Menu.

The main screen when the Setup & Configure tool is accessed to add or edit Appointment Categories is shown below.



- Existing categories are listed on the left section of the screen. Clicking on any one of them will open the details screen with the name color and any Event Management actions that may be associated with that Category (example shown above).
- Creating a New Category can be done by clicking the 'New' icon in the lower left hand corner.
- The color menu has three different menus attached to it with scroll bars for easy searching within the drop down menus. The color attached to each Appointment will flow through to your Appointments in the Schedule or within Projects.
- The option for a Private Appointment will set a Category that will then show up only in the Category you created (provided you have the security access to establish Appointment Categories) therefore that Private Appointment will be visible to your login profile.
- Event Management actions can be attached to any Category you create with the highlighted icons in the lower right section of the screen.
- Event Management actions will happen automatically by clicking any one of the Appointment, Task, Call Log, or Email icons you see. Fill out the preferences on the template including any content for any of the items and timeline preferences.
- For example, if your company has an Appointment Category for Sales Presentations you can setup an email to be automatically generated for the same day or the following day thanking them for their time, and a Call Log setup to

automatically be assigned for two days after the sales presentation for the sales representative to follow up with that prospect.

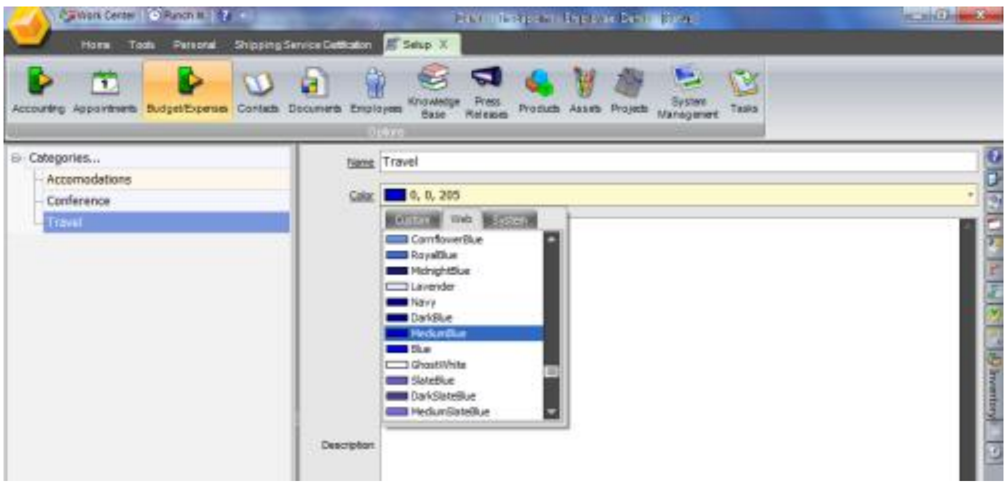
- Any changes made within the Setup & Configure tool will be automatically saved.

Each Appointment category will have the tools available to it so, your Appointments for Projects, Sales, Customer Management, etc. will all be able to have automated Events related to each of the Categories if your work flow process necessitates it.

Budget & Expenses

Categories for Budget and Expense items are setup through this section.

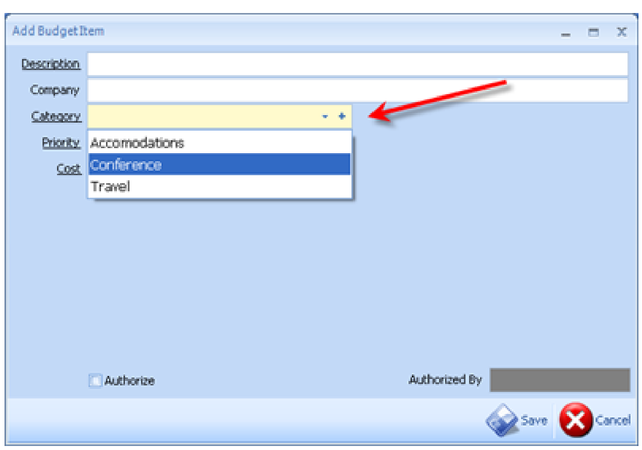
The main Setup screen for Budget and Expense Categories is shown below.



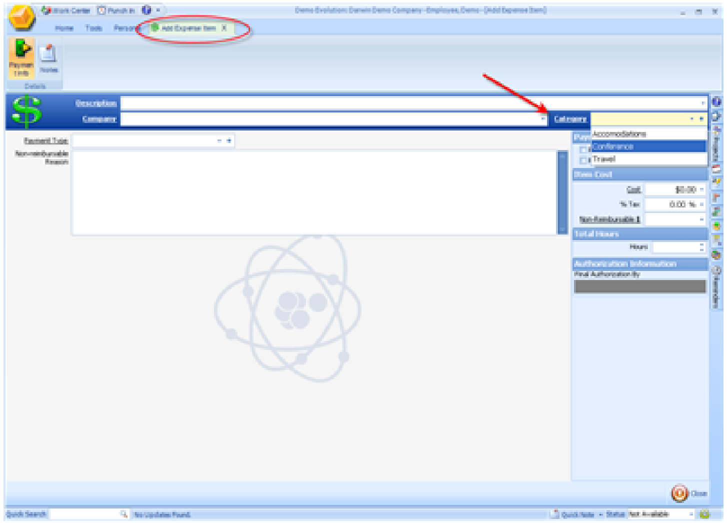
A color is associated with each Category and can be chosen using the same color menu tools as found within Appointment and Task Categories.

The Budget and Expenses Categories that are established in the Setup & Configure Tool will pre-populate within Budget and Expenses in Projects and through the Personal Tab for each Employee profile you have for when they add Expenses related to their activity.

The screen for a budget item within Projects is shown below, with the Categories visible in a drop down menu.



The view from the personal tab for individual expenses is shown in the image below. Keep in mind that expenses will show up in the reports and within each Employee profile under the Expenses tab.

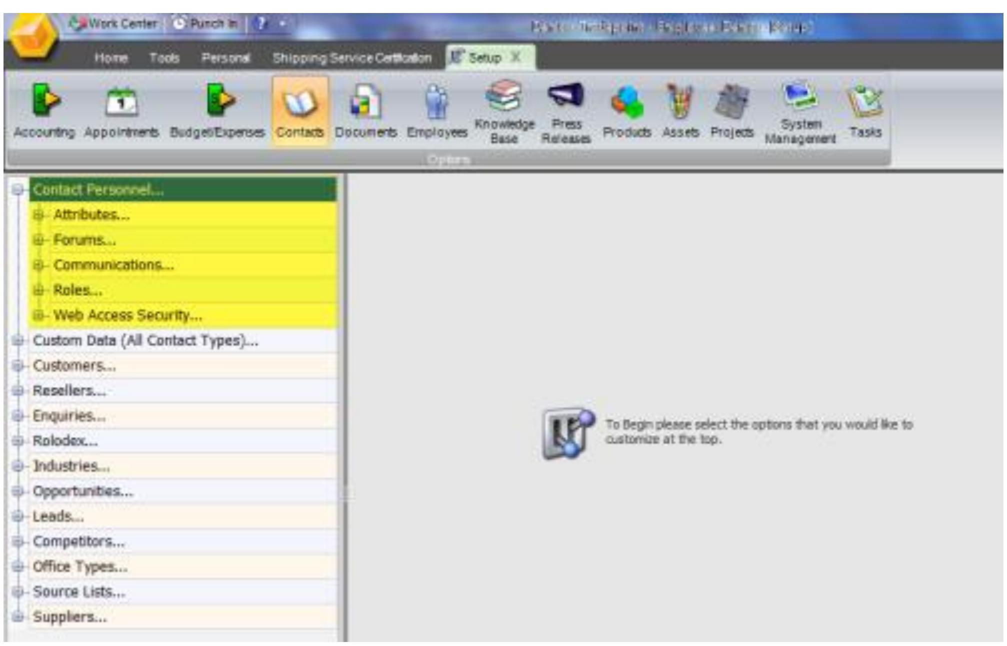


Within a Project, budget items can be an overall item where expenses are in relation to a Budget or they can be stand alone budget items. Expenses operate in the same way they can be in relation to a Budget or stand alone expenses that will need to be submitted in a report.

Contacts

Within the Setup & Configure tool the Contact section will provide access to numerous Categories and Statuses within the CRM component of Tradepoint. Each of these specific Categories and statuses can all be accessed through the blue plus found next to fields throughout the CRM component of Tradepoint.

An overview of the Contacts section of the Setup & Configure Tool is shown below with all of the Contact types that can be created through this part of the Setup & Configure tool.



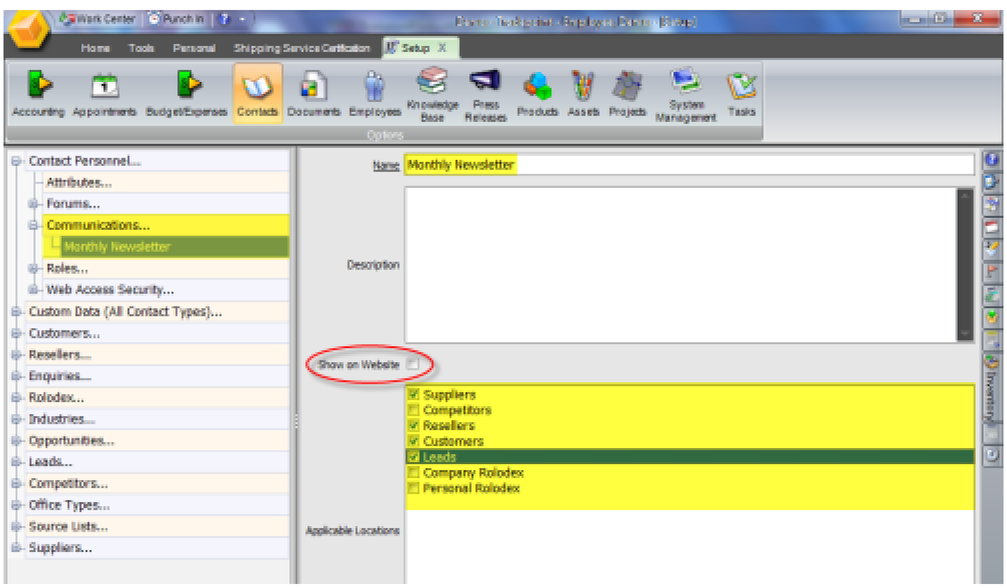
Clicking on any one of the Contact Categories on the left will open another menu with the detailed screens within any listed section you see to create or edit any related Categories and Statuses.

We will go through each section to outline the relating Categories and Statuses.

Contact Personnel- This subsection within Contact related to the contact within each Business to Business Lead, Customer, Reseller or Supplier. Creating or adding any Categories for this subsection will be available within the drop down menus for any contact personnel within those four sections of contacts.

Attributes - This corresponds to custom fields within a personnel contact. The icon is also labeled 'Attributes' within the top toolbar of contact personnel.
Communications – Define different types of communications for your contacts such as newsletters and sales promotions.
See Communications image A below for more detail.

Communications Image A.



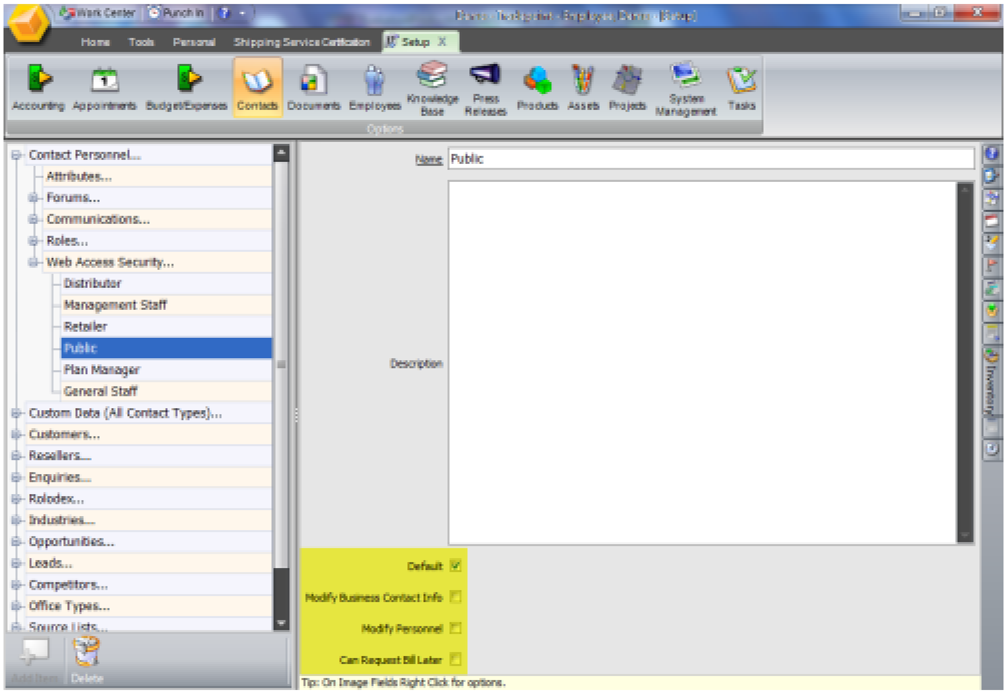
Each listed Communication is highlighted on the left. The highlighted options within the red box shows the contacts that your communication will be available to if you click on their box.

You also have the option to show this communication on the website with the 'Show on Website' option at the top of the Applicable Locations. When the 'Show on Website' is clicked you will have this as an option within the Customer are to be able to sign up to receive that communication.

Roles - A role corresponds to the job type within each Contact personnel. Each added item will show up in a drop down menu to choose from after the fact.

Web Access Security - Web access security allows security profiles and define what type of functions they can perform within their customer login section through your website.

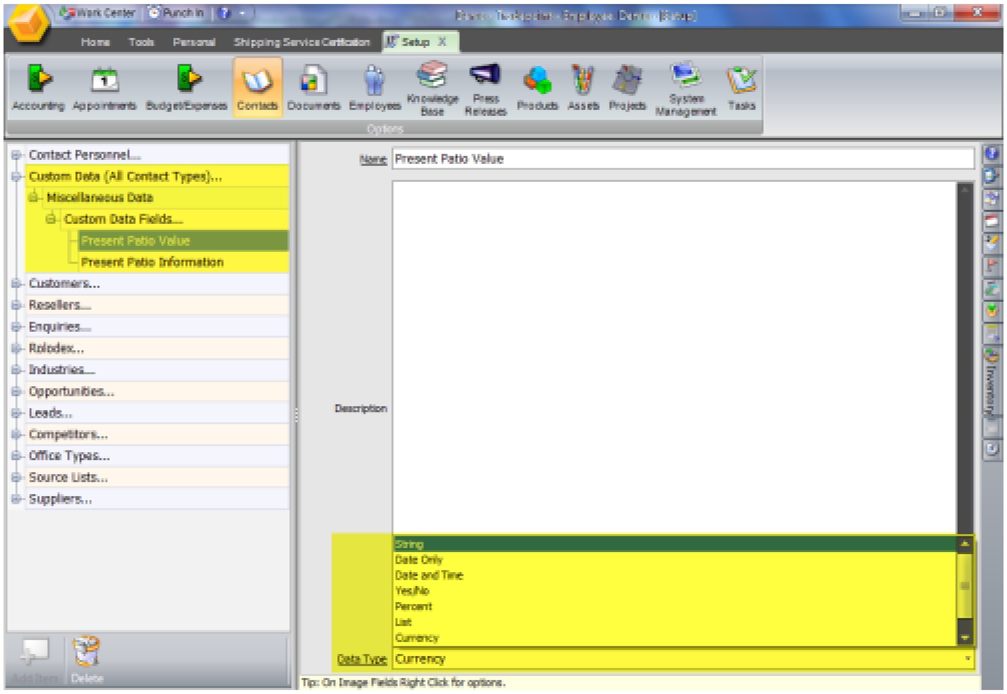
Each existing profile has options attached to it. The image below illustrates the functions for the type of security profile by the boxes that are checked off. *If no boxes are checked off then the contact will have view only access through the website.*



Custom Data - The next Contact type within Contacts of the Setup & Configure Tool is custom data. This field can be accessed through any icon within the CRM section of Tradepoint labeled Your Data.

There are two levels to creating custom data fields through the Setup & Configure Tool. The custom data label will be set up first followed by the actual field and the type of data the field will be holding.

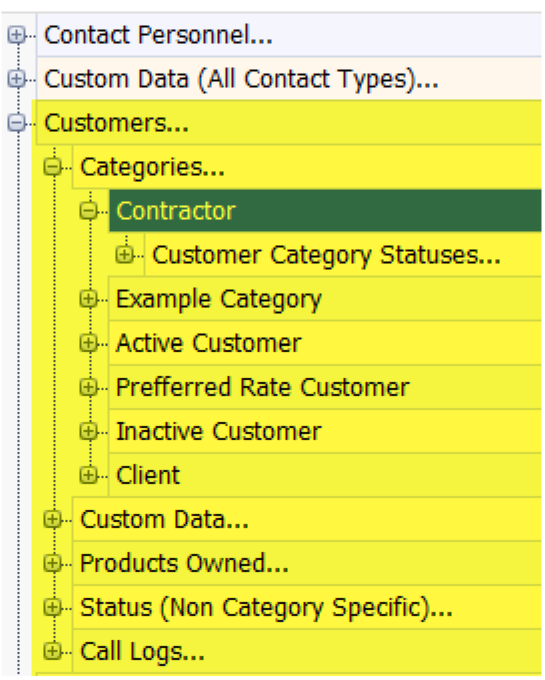
So, the first screen you will see will be to establish the header field for the type of Custom fields you are creating. The second screen you will see is shown below where you will establish the custom data field and what type of data it will hold.



The header field for the type of custom data is highlighted in red. The type of field is what is being created and the arrow indicated what type of data can be held within this particular field.

One thing to keep in mind about creating custom data field within the Setup & Configure tool. *Any custom data fields set up within the Setup & Configure tool will pre-populate to all contact types within Tradepoint. However, any Custom Data fields setup within a specific contact type(such as Resellers) will apply to only that contact type.*

Customers - The Image below shows which types of data that can be modified within Customers.



Categories- This field refers to the general Categories for each Customer contact easily visible from the main contact information screen.

Custom Data – Create and edit custom data fields specific to Customers through the 'Your Data' icon in the Customers tool bar.

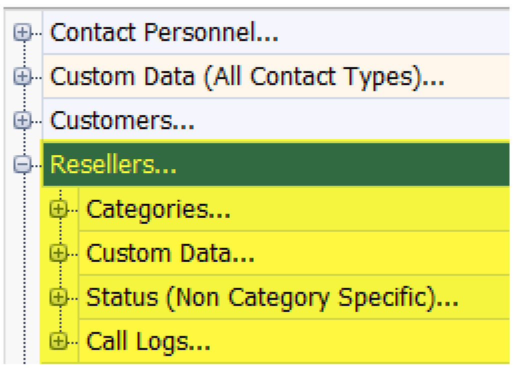
Products Owned - Create Categories for the purchase histories of your Customers. Categories such as Products and Services will enable you to distinguish the types of Products and Services you are selling at a glance.

Status - This relates to each of the Categories you set up. Each of your categories can have a Status such as 'Active' and 'Inactive'.

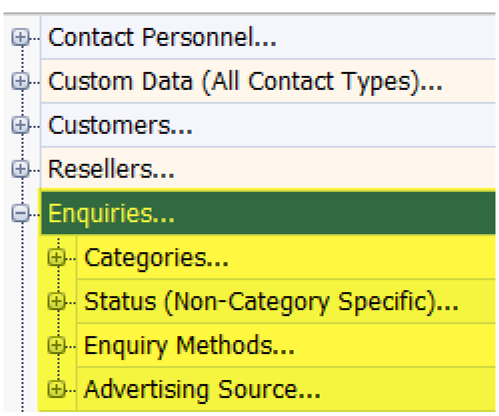
Call Logs - Your call logs have several types of data that can be modified within this sub-section of the Setup & Configure Tool.

- Support Statuses - Support statuses will pertain to the activity of your Call Logs and can have events attached to them to ensure Reminders, Tasks, Emails and additional Call Logs setup to ensure follow up in you Customer Management work flow.
- Categories- These categories will pertain to the Category chosen when an incoming or outgoing call is made. Event Management tools are available for automated processes related to incoming and outgoing Call Logs.
- Custom Data - These are Custom Data fields that are specific to Call Logs. Any Custom Data fields established here will pre-populate within Call Logs only.

Resellers - The same Categories available for Customers also are true for Resellers. The image below will show the same fields available for customizing. The structure and functions will be identical and any changes will apply to Resellers.



Enquiries - Managing your Enquiries will include several fields to track general information, advertising and marketing efforts.



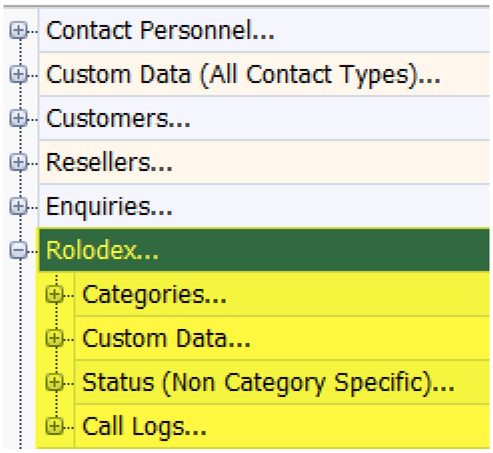
Categories - Pertains to the Category of Enquiry and can be adjusted as needed through the blue plus on the main contact information screen within Enquiries.

Status - Making their purchase within 1 week, 30 days, 3 months are some examples of Statuses that can be set up within Enquiries. Statuses here are non-Category specific therefore they will stand alone in their function.

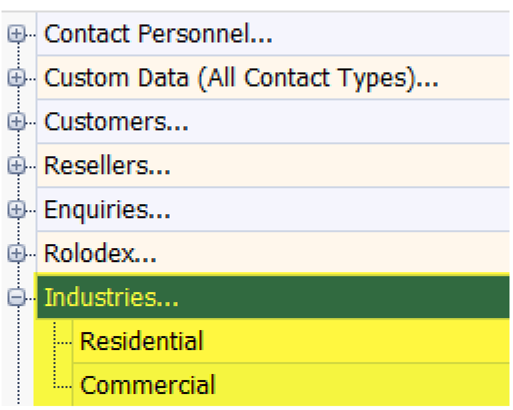
Enquiry Methods - How did this prospect find us? Walk-in, Phone, website, or referral. These are just a few examples of Enquiry Methods that can be setup to track your marketing/Advertising efforts.

Advertising Source - Track your Advertising efforts by creating Advertising Source categories for each of your advertising venues. Web based, print, TV and other advertising types can easily be tracked with this tool.

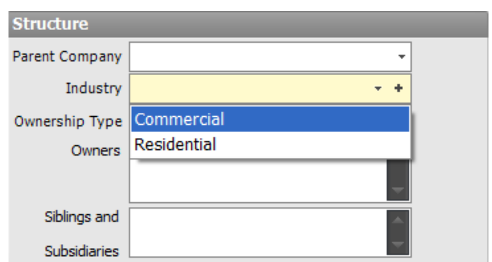
Rolodex- Your Rolodex will be structured similarly to Leads with data and communication tools and no financial transaction tools. The image below shows which fields can be customized.



Industries - Industries will pre-populate within the Industry Type field that can be found under the Company icon from any section within the CRM section of Tradepoint. Below is an example of Industries.

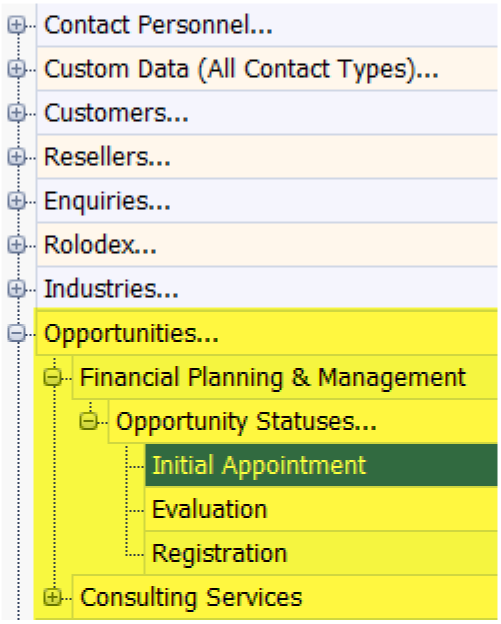


Under the Company icon you will see a section of fields that will have a drop down menu with the list of Industries you have setup within it.

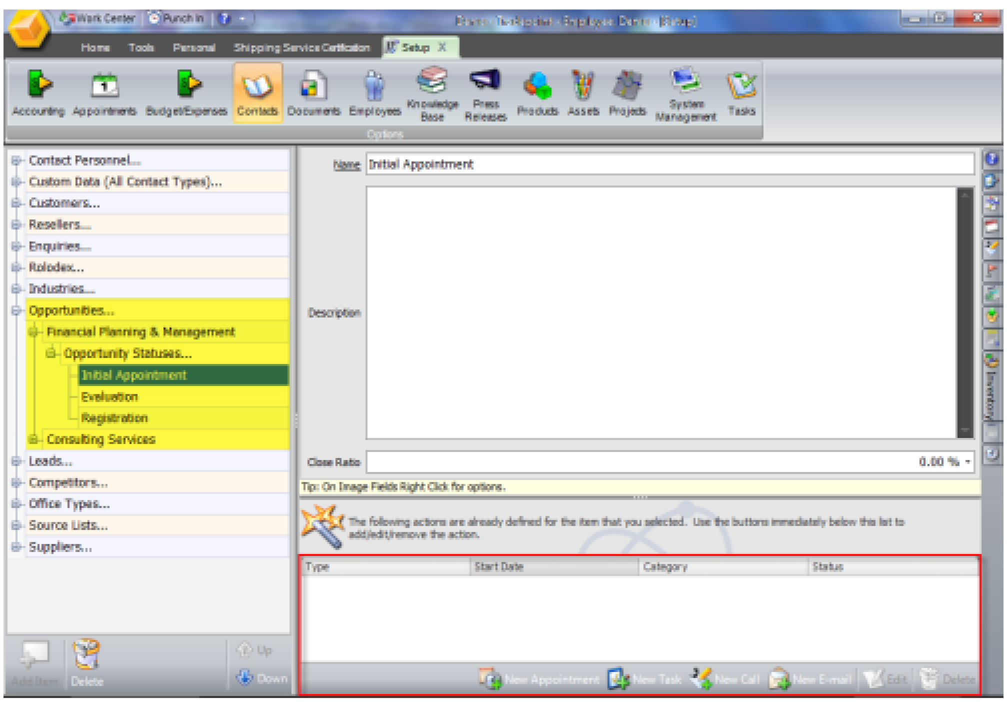


Opportunities - Opportunities is important to an automated sales process because your sales process can be defined and automated by the tools within opportunities. The Category and Status structure is enabled with complete event management so each step of your sales process can have the built in actions ensuring closure for sales efforts.

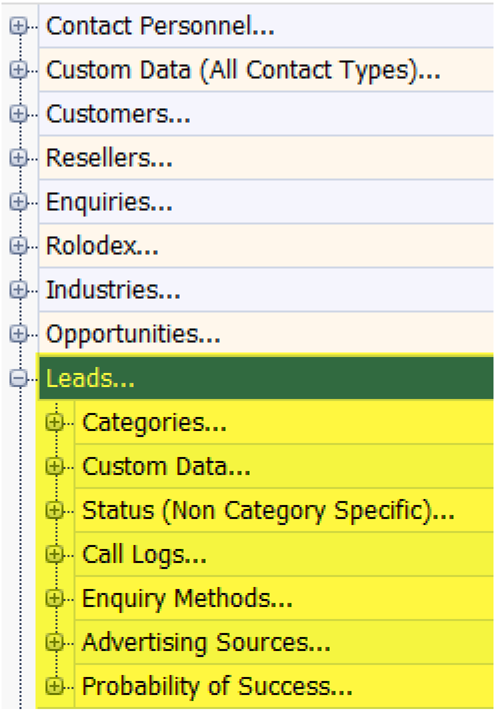
The initial screen will be for defining the Category structure (as shown below).



Click on an existing Category or for a new configuration click the 'New Category' icon in the lower left to open the screen shown in the image below. When you create a New Status you will see the Event Management Tools at the bottom of the Status screen to define your automated sales process. Clicking on one or more (in the order you want the events to happen) will create an automated set of steps that will follow your Sales Opportunities.

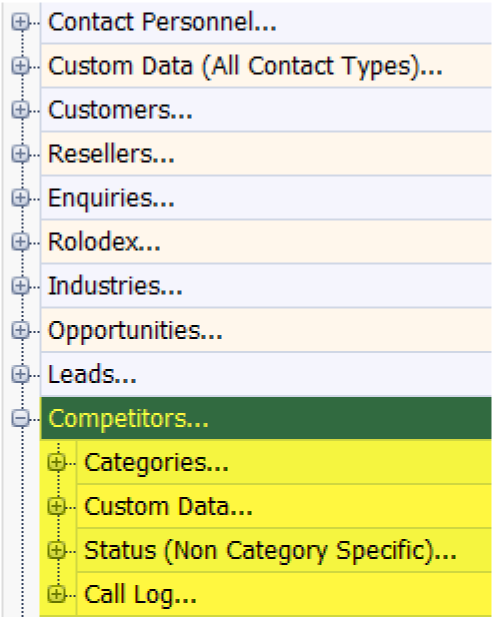


Leads - All of the fields that can be customized are shown in the Image below. The functionality will be consistent with the rest of the Setup & Configure Tool.

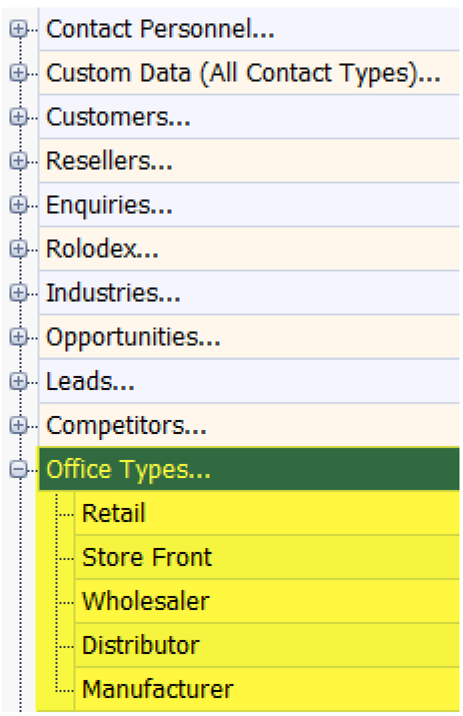


- Categories – This will define the Categories of your Lead contacts. Categories is enabled with Event management Tools to automate your Sales Process.
- Custom Data- Define specific fields relevant to your Leads that will pre-populate within the 'Your Data' section of Leads. Fields added here will only apply to Leads.
- Status – You can have Statuses attached to each or only some Lead contacts. Within Leads a Status does *not* have to related to a Category. This section is enabled with Event Management.
- Call Logs-Your Categories and Custom Data fields within Lead Call Logs can be defined here. Categories are enabled with Statuses and full Event Management to automate any Lead follow up process.
- Enquiry Methods-Track how your prospects find you by adding in types of Enquiry methods by which people find you. Enquiry Methods is enabled with Event Management to automate a follow up process for prospects.
- Advertising Sources-Track all of the advertising sources that you use to determine which one are the most effective. You can have a general structure or a very detailed one with this section. Event Management is attached to Advertising sources to create an automated follow up structure.
- Probability of Success-If you rate the closing probability of your Leads you can define that scale within this section in the same way you would setup a Category or Status.

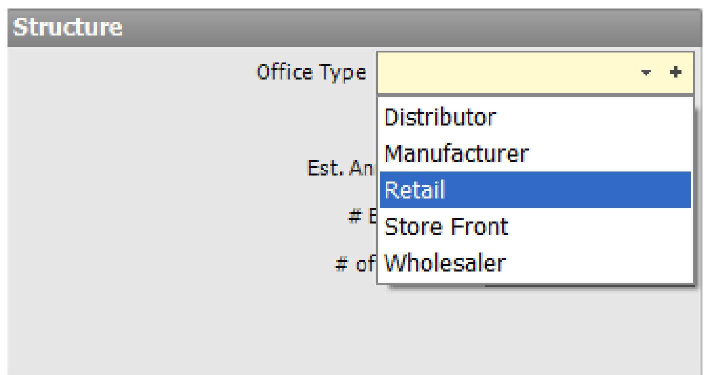
Competitors- The fields available for customization within Competitors are identical to Customers, and Resellers. The image below will show the same fields available for customizing. The structure and functions will be identical and any changes will apply to Competitors.



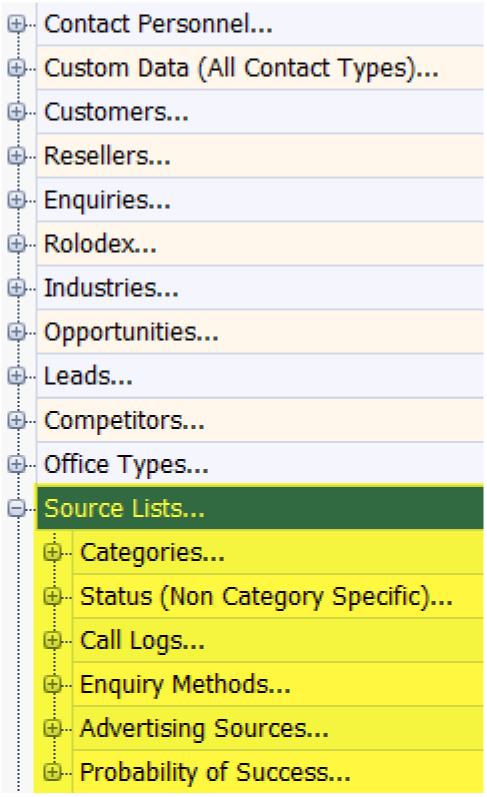
Office Types- This is one more customizable type within the Company icon found in every contact section within Tradepoint.



Creating Office Types will pre-populate within the Company data section show below.

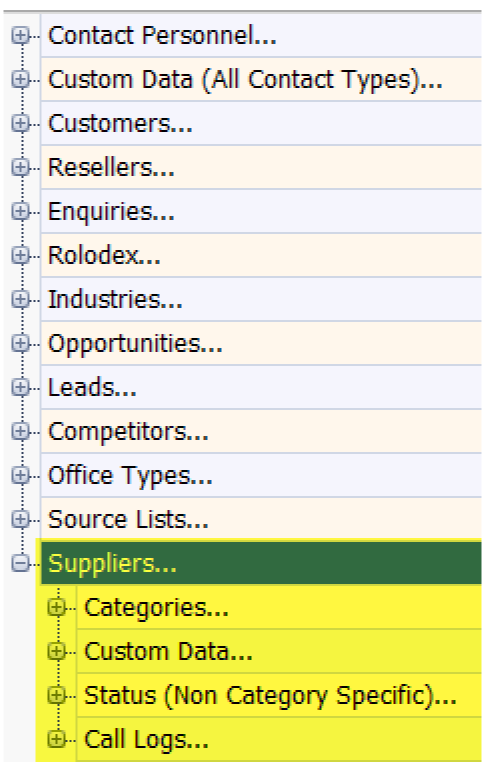


Source Lists - The fields available for customization within Source Lists allow for additional lead and sales tracking capability. Functionality available within each of the field types will be identical to the functionality found in other sections of the CRM within Tradepoint.

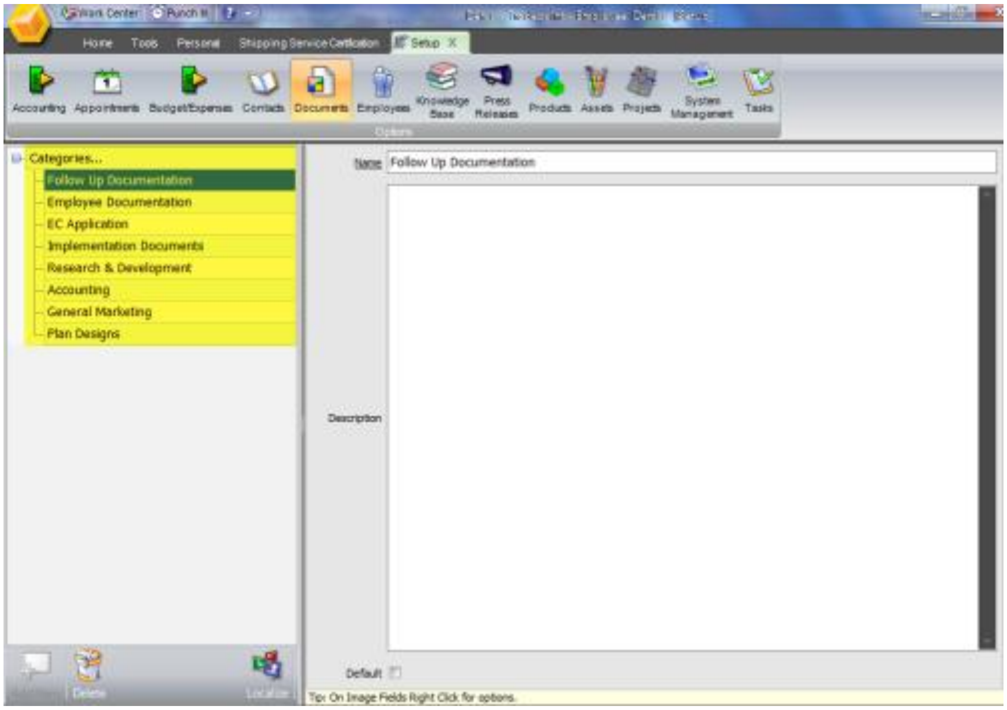


Each of these field types is enabled with Event Management for an automated lead tracking process, with the exception of the 'Probability of Success field which is an information field only that will allow you to create a drop down field within that field for multiple choices.

Suppliers - Fields that can be customized are very similar to those found on other CRM sections of Tradepoint. An image below shows which fields can be customized.

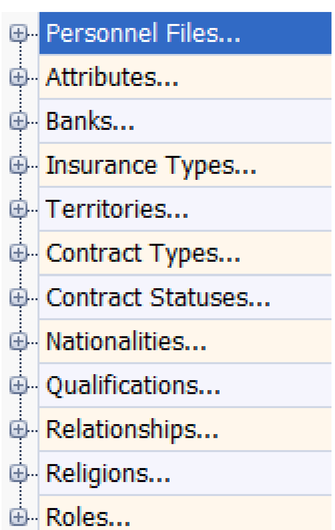


Documents - Categories created within this section will pre-populate to Contacts, Tasks, Appointments, Products, Projects, Knowledge Base articles and Employees. The format is straight forward with just the name and the option to set a Category as a default.

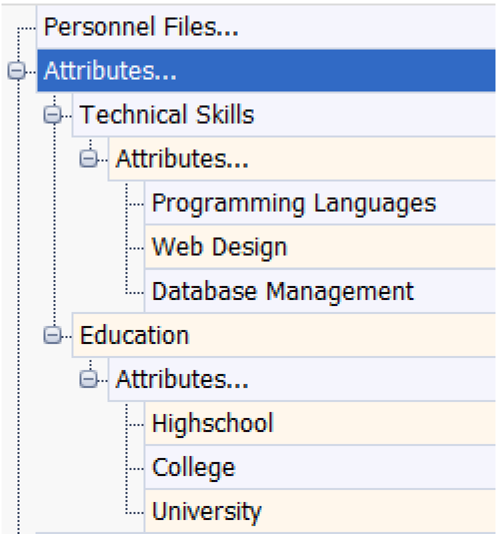


If you choose to have a Category as a default then every time you go to add, scan or create a document the default category be pre-populated in the category field and you would have to choose another Category if necessary.

Employees - Fields specific to Employees include the Attributes section and Territories.

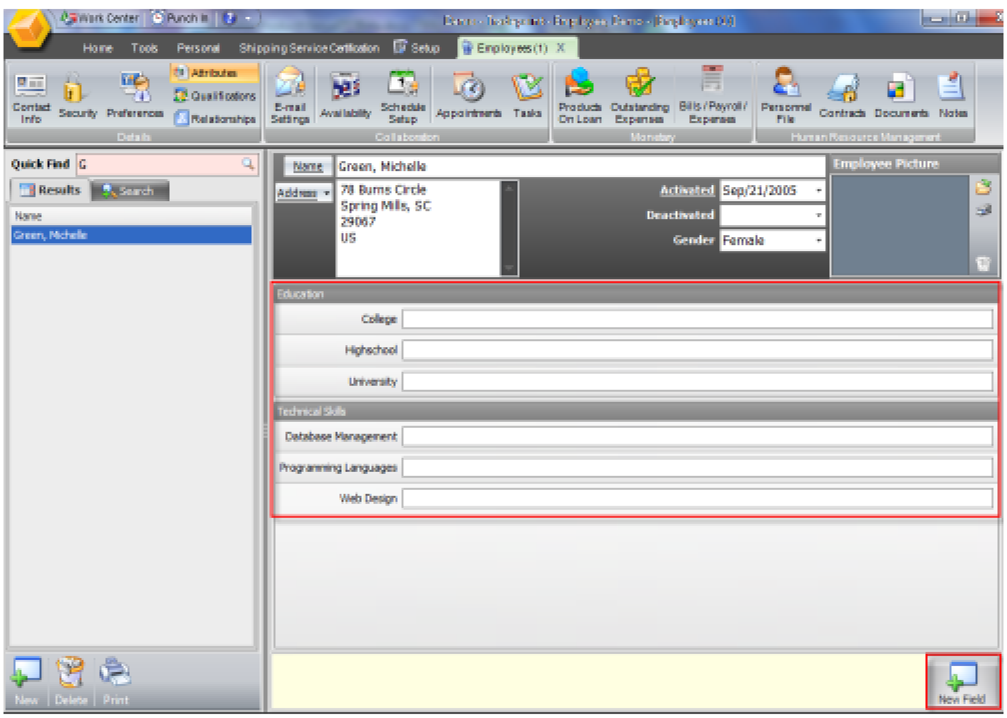


Attributes is a custom data section specific to Employees.

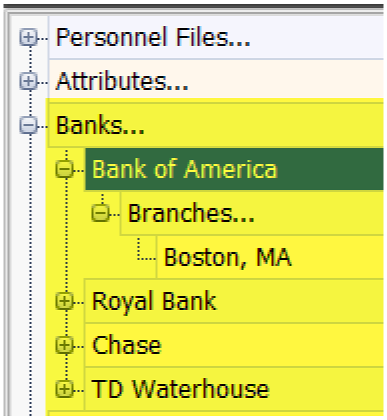


Attributes are broken down into two different sections within Employees, Technical Skills and Education. This way most company preferences can be either or a combination of both educational requirements and technical skills.

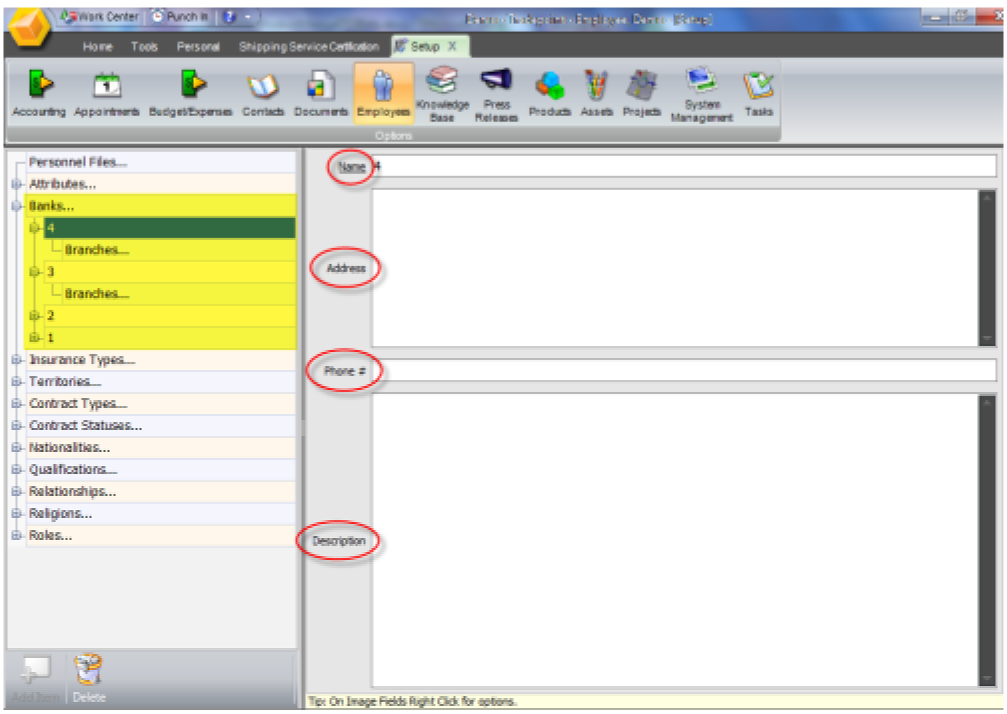
The view of these fields once they are created is shown below. The "New Field' icon in the lower right is the tool to adjust an existing field or create a new one.



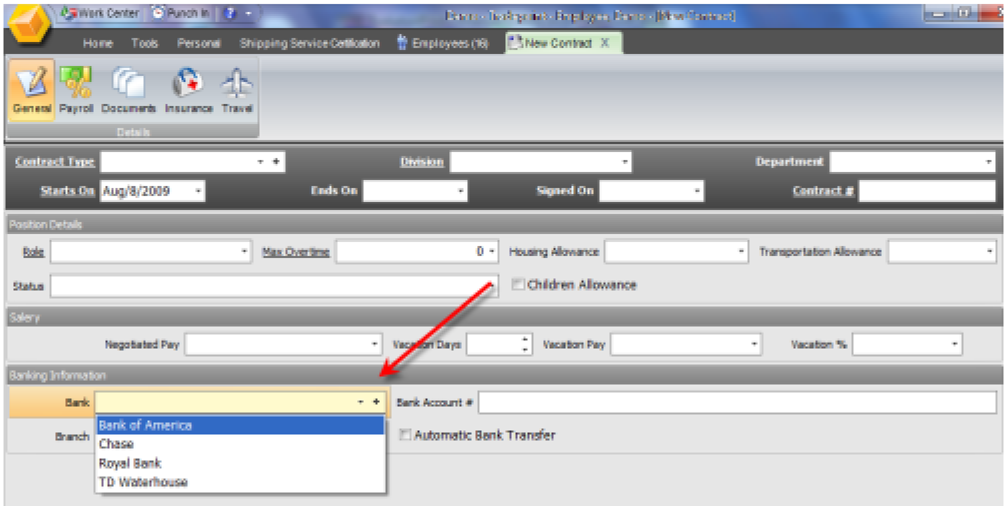
Banks – This section is intended to hold bank data for contract or temporary Employees for payroll, re-imbursements and any expenses that may be paid out.



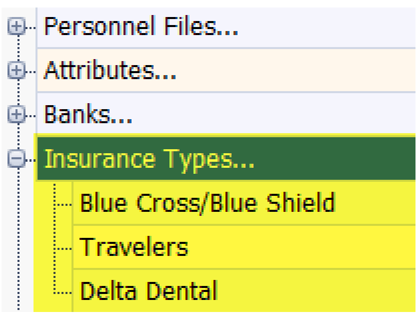
Setting up detailed information such as Branch and contact information within each Bank Category is done by clicking on the branch. In this example clicking on Boston, MA would open the screen in the Setup & Configure Tool for those branch details.



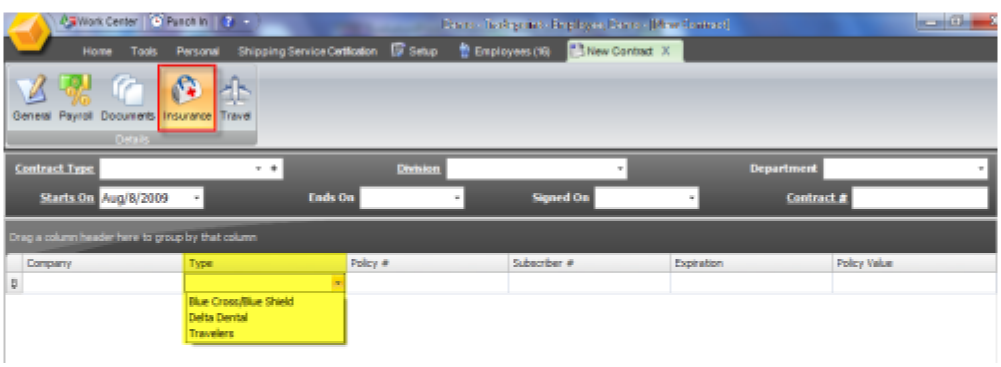
Once branch details have been entered they will appear within the Contract section of Employees in Tradepoint.



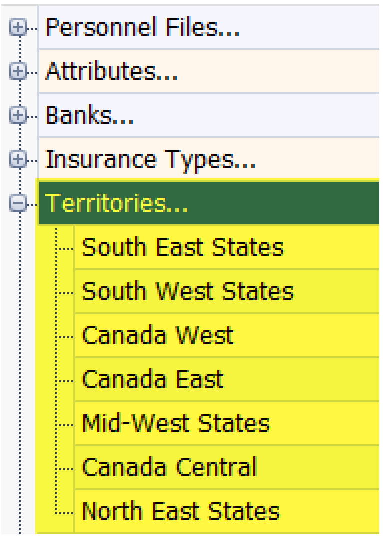
Insurance Types - Each Employee profile can have different Insurance Types within separate contracts by using this option in the Setup & Configure Tool.



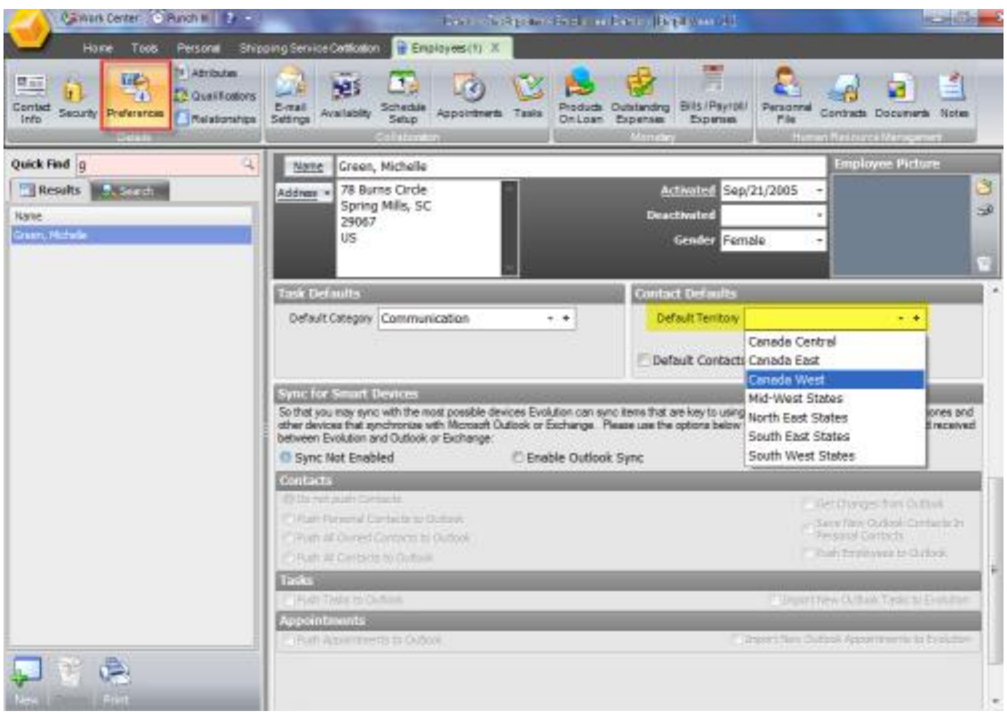
After Insurance Types are setup they will appear within contract options as part of the drop down menu under the insurance icon.



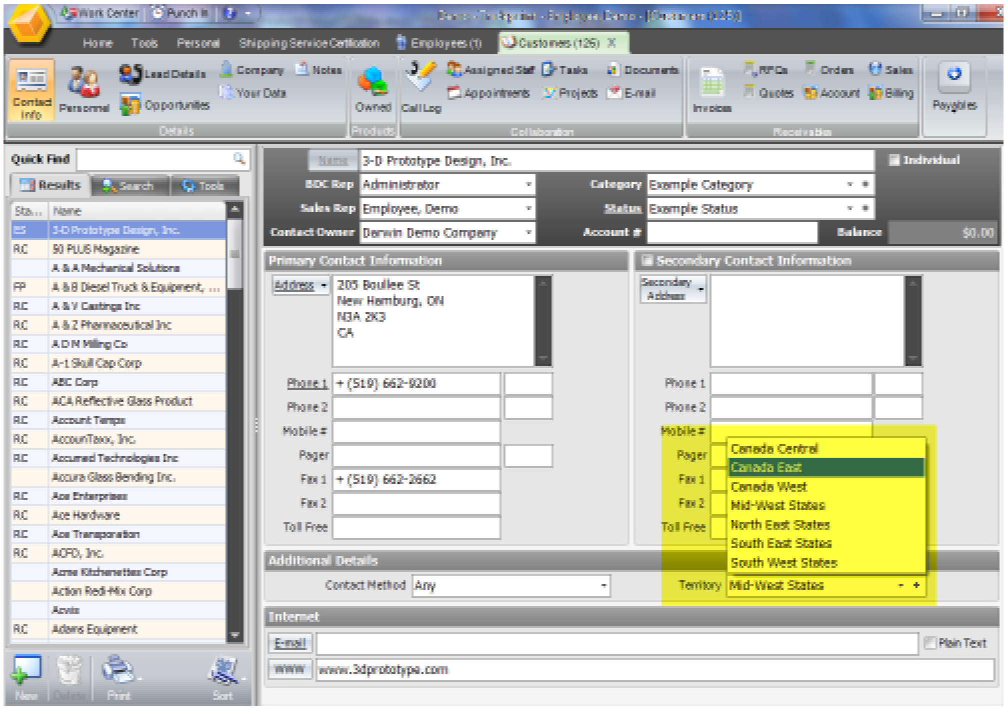
Territories - Sales Territories are setup within the Setup & Configure Tool and then can be associated with one or more Employees. When they are associated with subsequent contacts and the security profiles are linked to territory then sales representatives will only see contacts within their give territory.



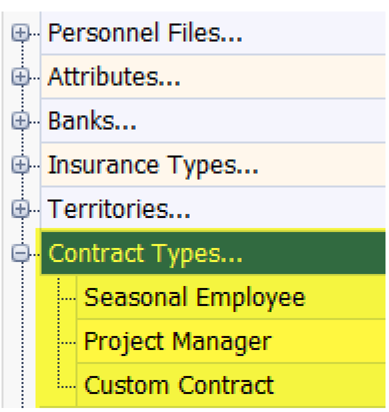
When an Employee is assigned a territory the option is found on the Preferences screen.



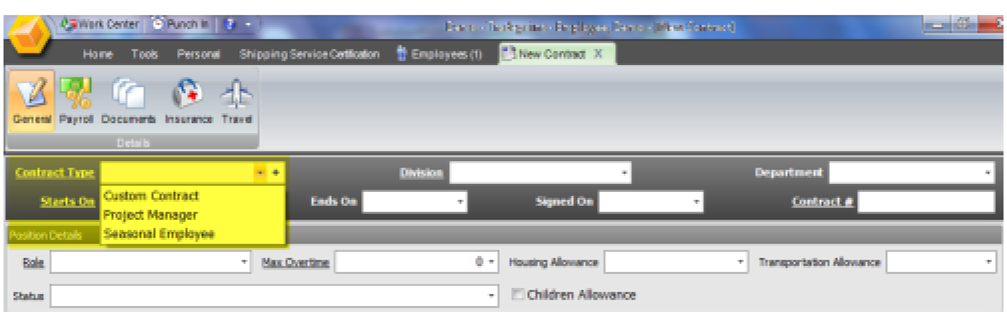
On the contact screen territory is found on the main contact information screen:



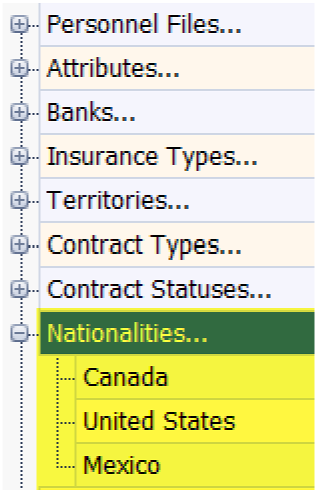
Contract Types - For different Types of contracts to classify any temporary employees, Contract Types will allow different Types of contracts to be set as specific contracts are created.



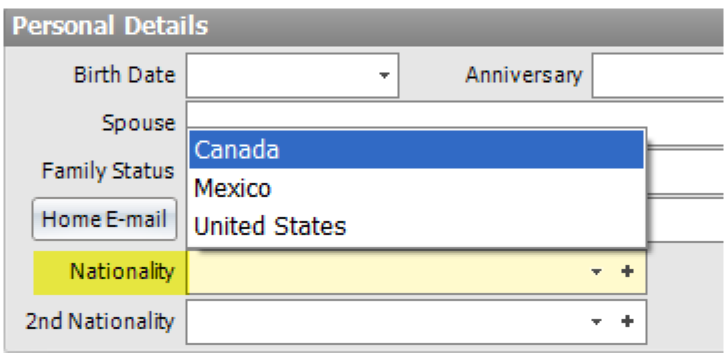
When Contract Types are established they will appear within Employees under Contracts within the New Contract screen in a drop down menu.



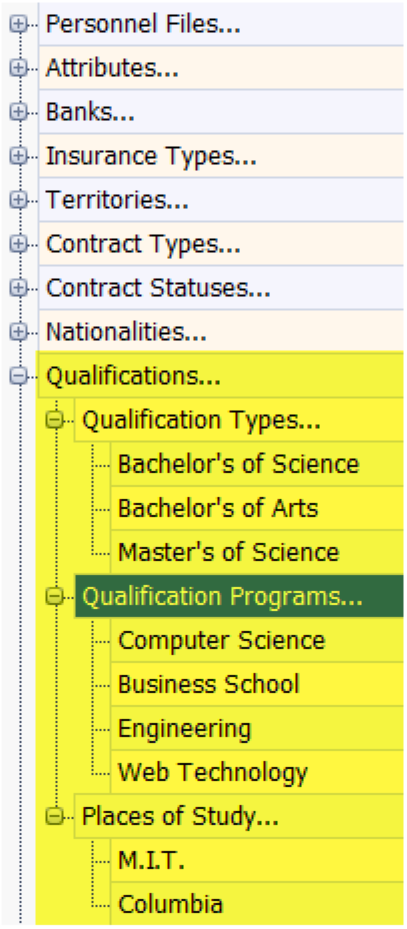
Nationality - The nationality field allows drop down menus to be created for both nationality and a 2nd Nationality.



When Nationalities are setup they will be accessible through the Nationality and the 2nd Nationality fields found on the Contact Info screen for an Employee profile.



Qualifications - Qualifications can be established per Employee. Qualifications includes educational degrees, levels of educational degrees, where a person studied and eve what school was attended.



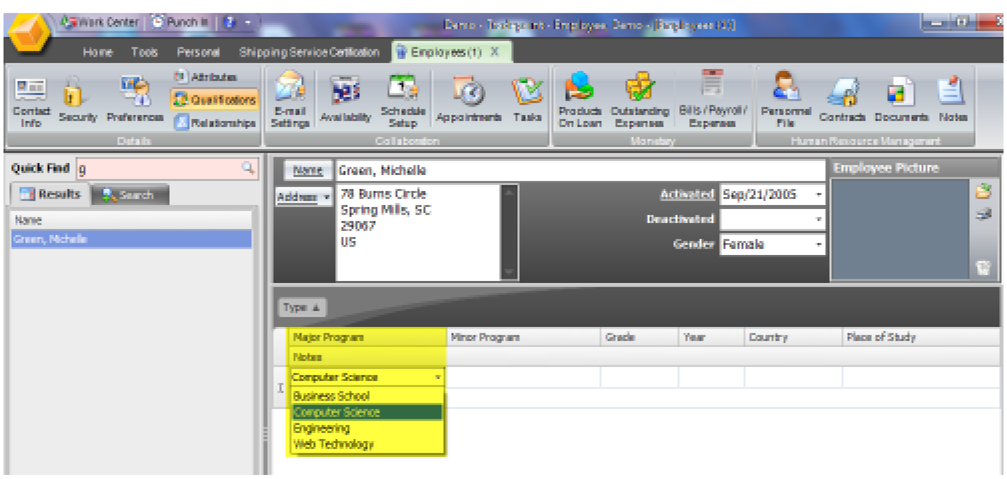
All of the customizable information under Qualifications is displayed on the left. In this example Qualification Types indicate the Type of degree.

Qualification Programs indicates the area of study in an educational program.

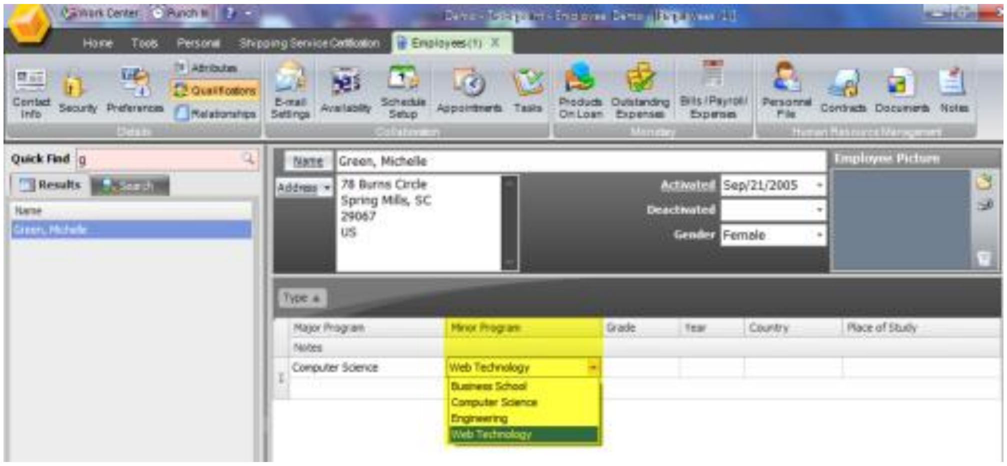
Places of Study indicates the location of study.

When Qualifications are setup they will be accessible in drop down menus within Employee profiles under the Qualifications icon.

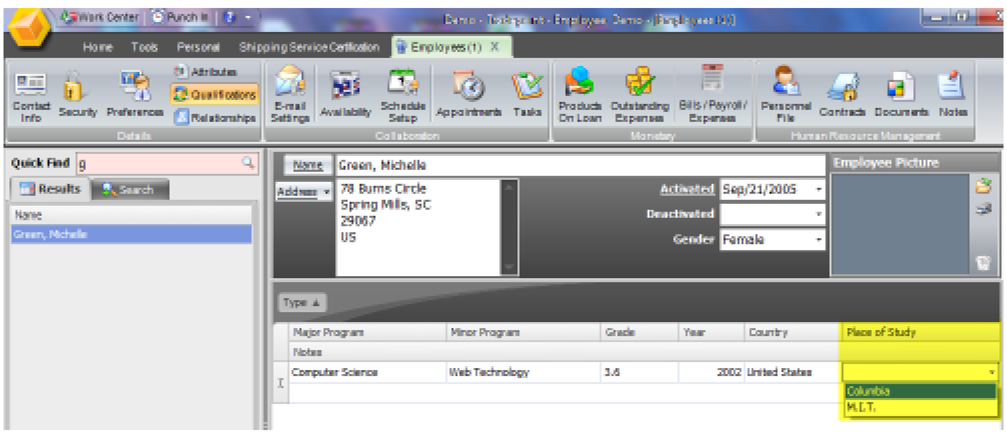
Accessing the customizations is done through drop down menus. Major Programs draw on the customizations from Qualification Types.



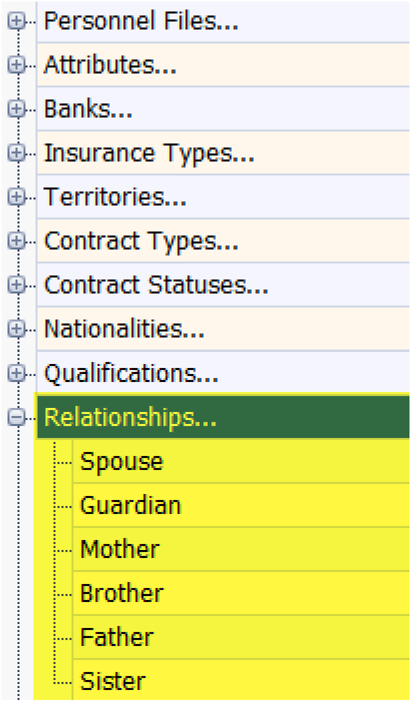
Minor Programs draw on Qualification Programs that have been setup in the Setup & Configure Tool.



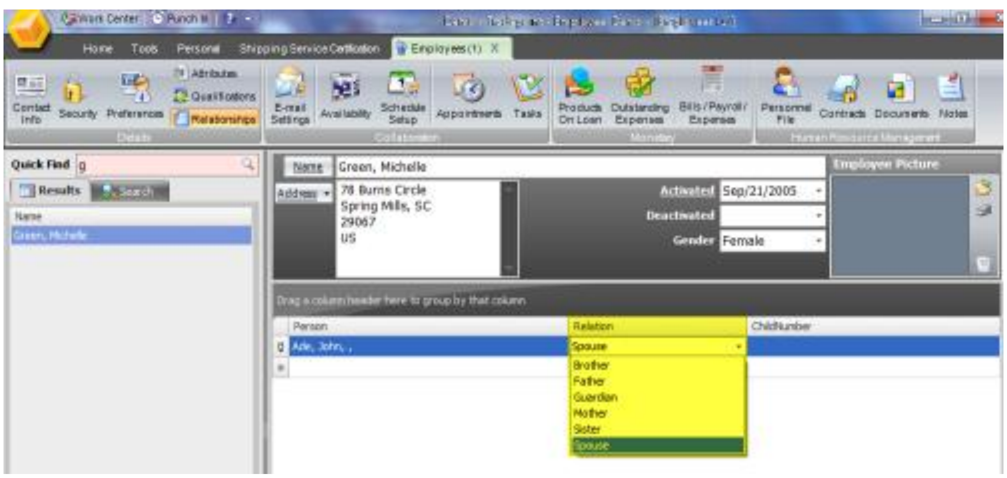
Places of Study will draw on the institutions that have been setup under Places of Study in the Setup & Configure Tool.



Relationships - Relationships enables customizations for personal and family contacts.

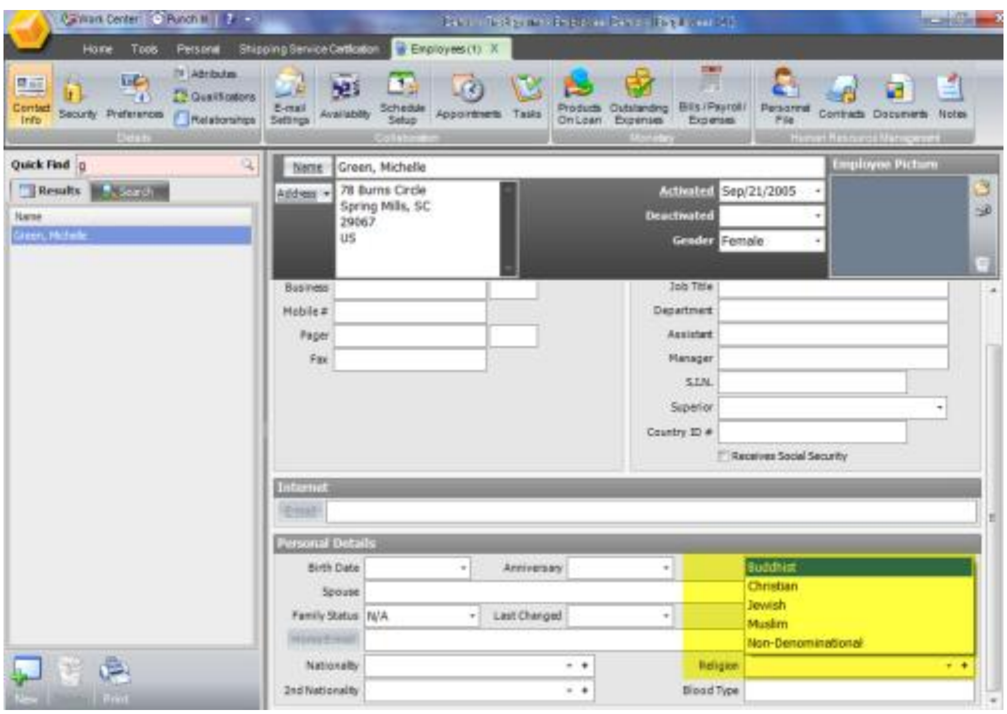


Once the relationships are setup they can be associated with additional contacts in an Employee profile.

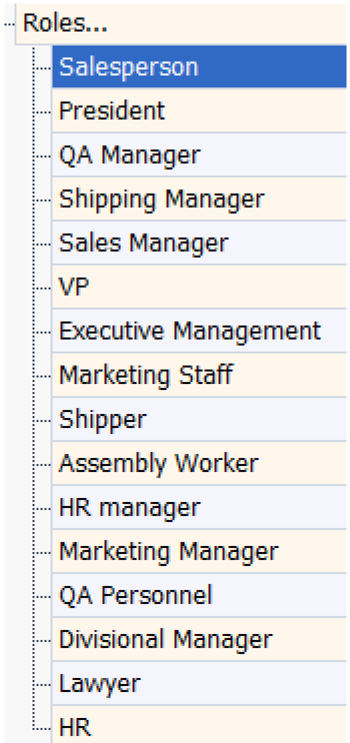


Religion - To setup preferences for different religions to be associated with Employees use the Religions options in the Setup & Configure Tool.

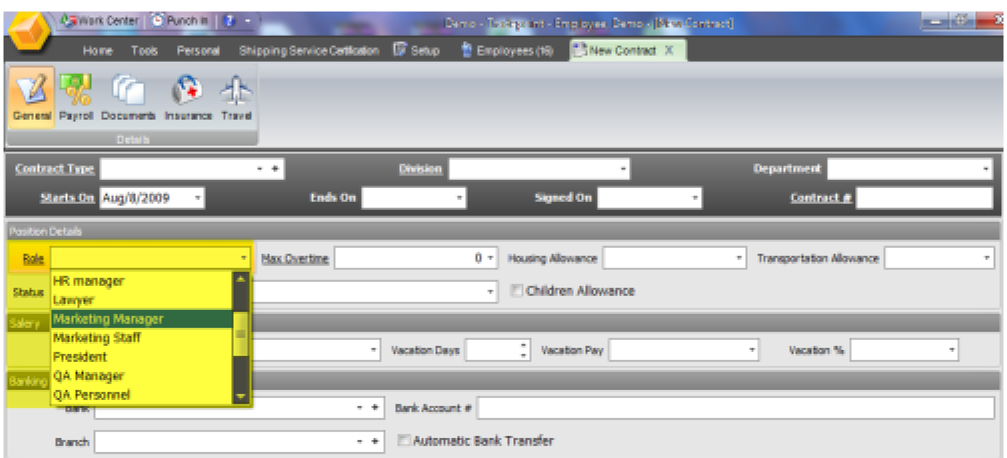
Once these options are setup they can be accessed through the drop down menu in an Employee's profile on the main contact page.



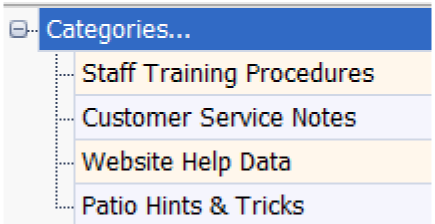
Roles - For use in Contract Employees, Roles is a customizable field to define the role that a contract or Temporary work will fulfill for an give contract.



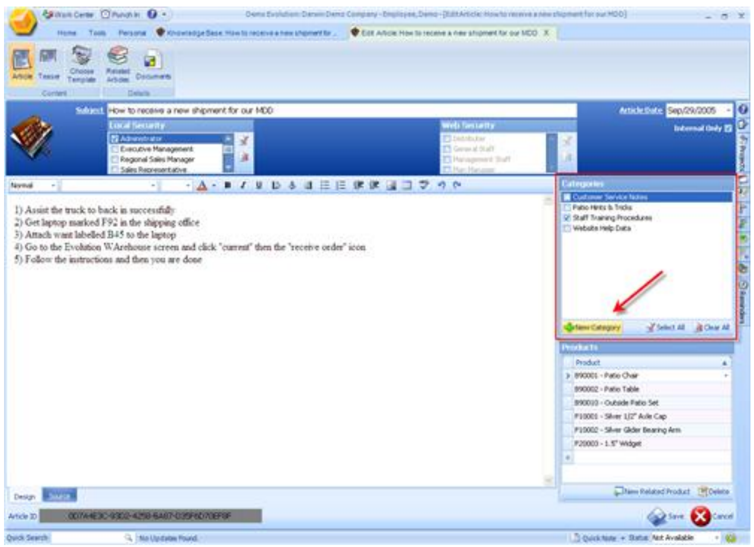
Once roles have been defined in the Setup & Configure tool they can be accessed within a drop down menu in the new contract screen within an Employee profile.



Knowledge Base - Knowledge base categories can be set up for each type of article directly through the Setup & Configure Tool.

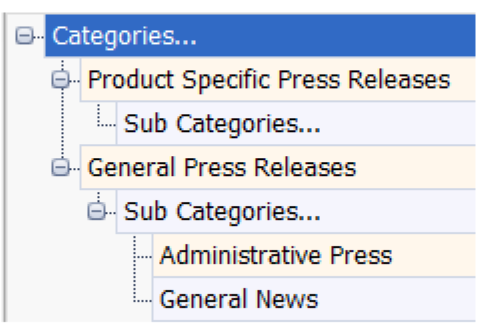


Each Category that is setup up will be visible through the main page within the Knowledge Base shown below. The highlighted section on the right will list each available Category with check boxes to associate specific articles with specific categories.

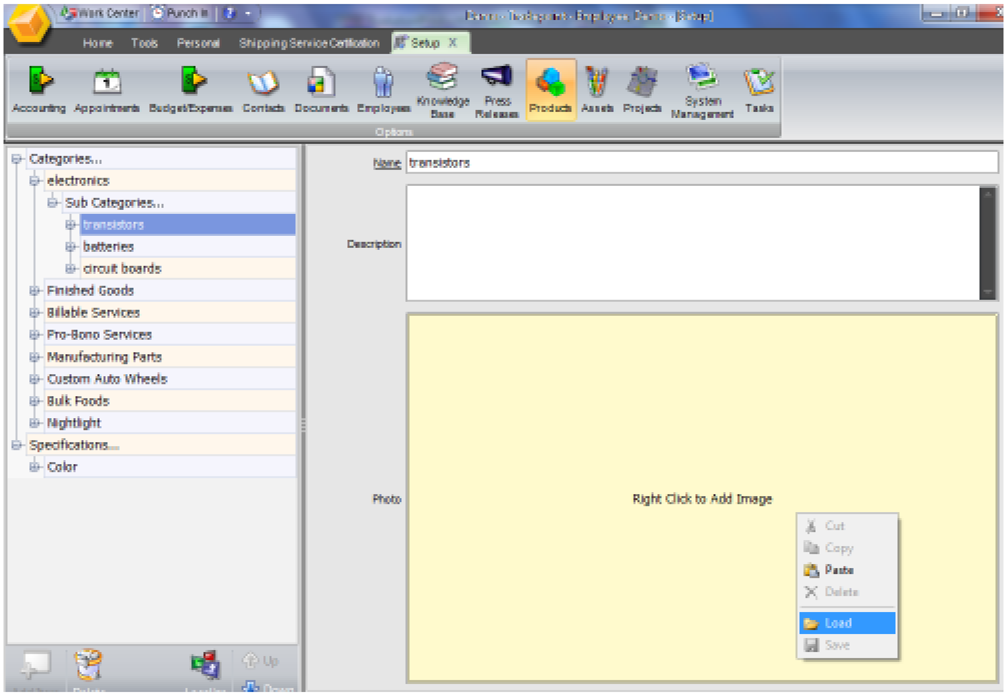


The New Category icon gives easy access to creating a New Category easily within your Knowledge Base articles.

Press Releases - Press Release Categories are similar to Knowledge base articles with the ability to have sub-categories related to a Category. Categories and sub-Categories can be setup through the Setup and Configure Tool or through the Press Release window directly. There is no limit to the amount of Categories and subcategories that can be created.



Products - Product fields open for customization include Categories and Sub-Categories. Setting up these fields is largely the same as setting up Categories and Sub-Categories with additional functionality built into Sub-Categories for Product listings that will be listed through your website of you are using one of our Ecommerce solutions.

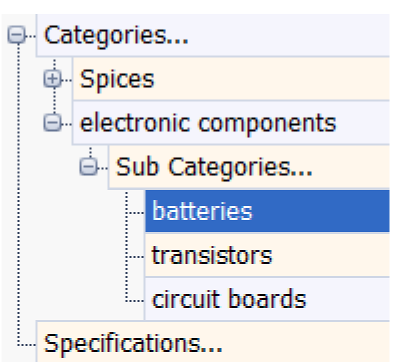


Product Categories and Sub-Categories will have the option to add an Image to the specific Sub-Category, add a page ranking and also have options to localize that particular Category with the Localize icon highlighted in the lower left corner.

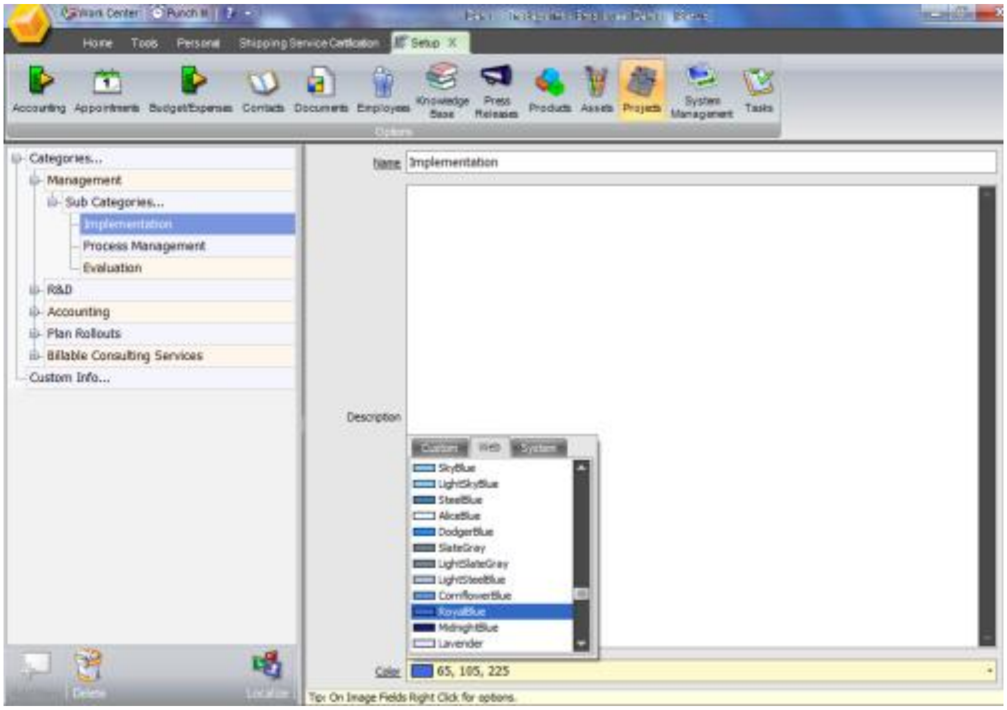
Follow the prompts on the screen to add Images for your Product listings. The right click menu is shown in the example above. Prompts for localization instructions are available when you highlight a Sub-Category and click the Localize icon. So follow the prompts and depending on what markets you are localized for you will have those options available within your Localization tool.

Assets - Assets is the section of Tradepoint that will hold any of your raw materials or items that you use in bulk and that will be used within the Assembly functionality.

Assets will have Categories, Sub-Categories and Specifications (Custom Data) that will have the basic functionality for establishing Categories and Sub-Categories. The image below shows the main screen for creating a Category and related Sub-Category.



Projects - Within Projects you can customize Categories, Sub-Categories and Custom Data fields specific to your Project work flow needs. Each of your Project Categories and related Sub-Categories will also have a Color Assigned to them.



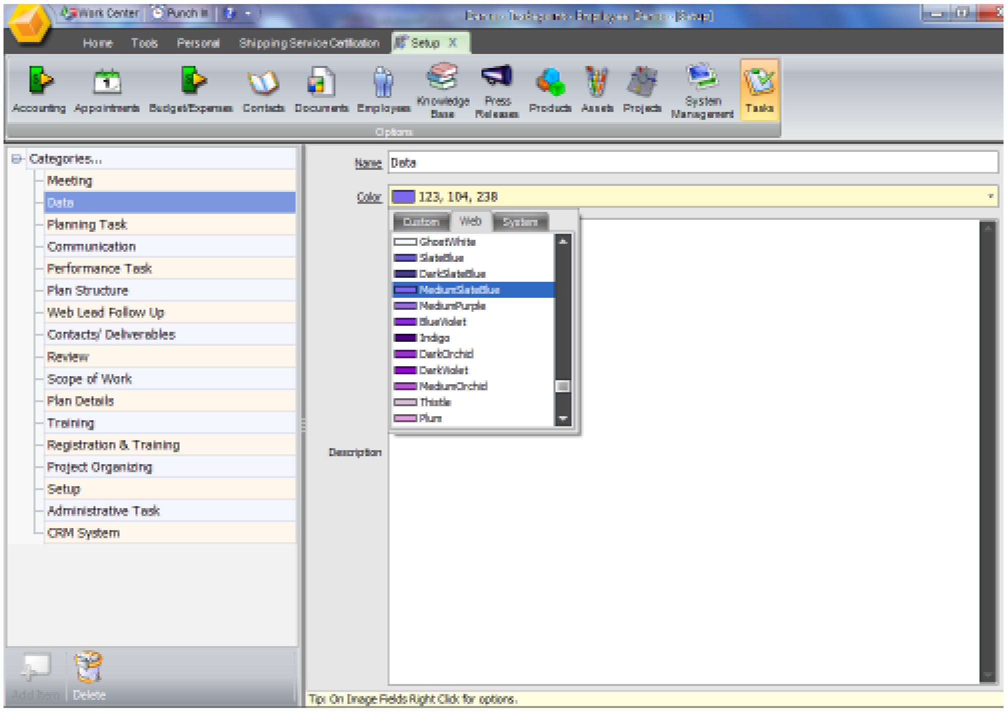
The different color menus are built into the color option field as shown above. Changes will be saved automatically.

System Management - The system management option in the Setup & Configure tool is meant to store information regarding your updates, synchronization point, and your Account Numbers.

- Updates - This will often be pre-configured for your when Tradepoint is installed to be able to receive updates directly from Darwin Productions. If you are hosting your own Database or website you will see a Server address in the top field shown in the image above.
- Synchronization - This field will show the address of the Server that your synchronization point will be located at. This could be within your own network our be within a Darwin Productions facility.
- Contact Accounts Numbers - These fields allow you to adjust the Contact Account Numbers to start on a particular number and you can add a prefix to your Account numbers. The numbers that can be customized with this tool include: Invoices, Quotes, Orders, and Purchase Orders. The bottom field will allow you to add a prefix to any one of those numbers.

  This option also supports delineation of Orders using Types (Parts, Service and Equipment). Either the Database Prefix or the Types Prefix can be used.

Tasks - Categories and their respective colors that are setup within the Setup & Configure Tool will pre-populate to Tasks generally as well as the task structure within Projects.



To add a new Category Click the ‘New Category’ icon, add the name and choose the color associated with the Category. Your changes will be saved automatically and will be pre-populated within Tasks as a whole and within your Projects.

Work Center – Dash Board Controls

Setup & Configure

The Work Center is a customizable dashboard tool built into Tradepoint for both convenience in functionality for business environments to provide optimal performance and to track any and all activity with Customers. The Work Center is role based and can be pre-configured based on your roles (ideal for Sales Force Automation and Management) within your company.

If your Work Center dashboard is enabled, within your Employee profile it will be visible immediately on the main window when you login to Tradepoint.

The Work Center must be activated within the Preferences section of an Employees file to open automatically when a User Logs into Tradepoint.

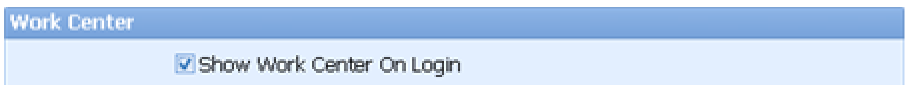
There are two ways to access the Preferences for an Employee profile.

1. Directly through the Employee profile within the Employees section.

2. Through the Personal Tab at the top of your screen next to the Tools Tab.

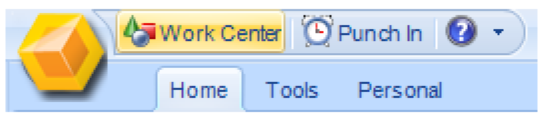
From the Personal Tab(shown below) click on the Preferences icon and you will see several windows including a Work Center window.

Be sure to check off the box you see below to activate the Work Center.

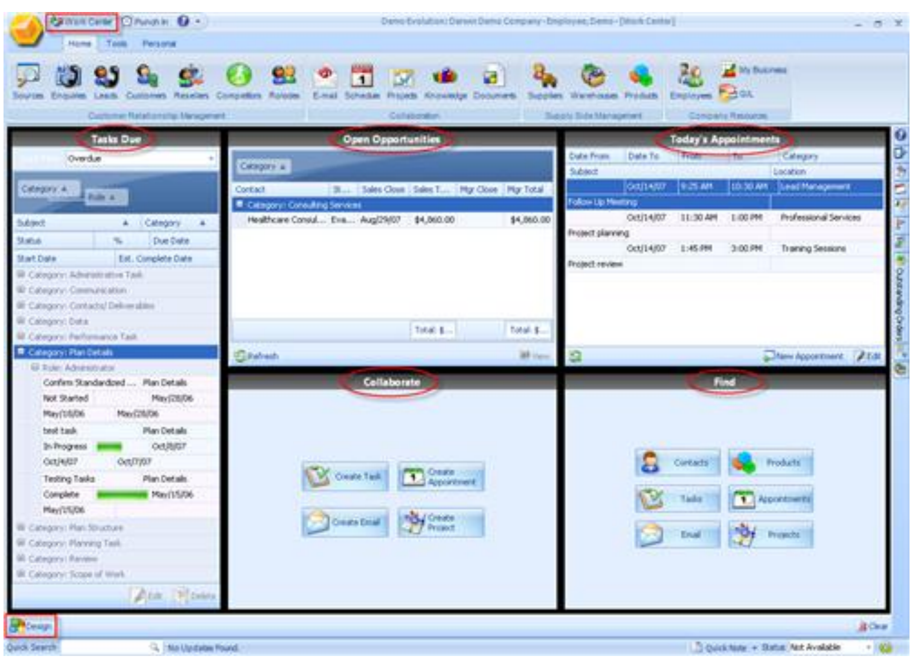


When the circled box above is checked then the Work Center will be enabled. When the user logs in the Work Center will be the first thing shown on the screen.

The Work Center can be accessed at any time by clicking the Work Center icon visible at the top of your window.



The Work Center dashboard has built in drag and drop functionality for easy configuration. The type of configuration can be determined by your company. Below is an example of an active and configured Work Center.



If your Work Center has not already been configured for you then configuring your Work Center can be done easily through drag and drop functionality built into the interface.

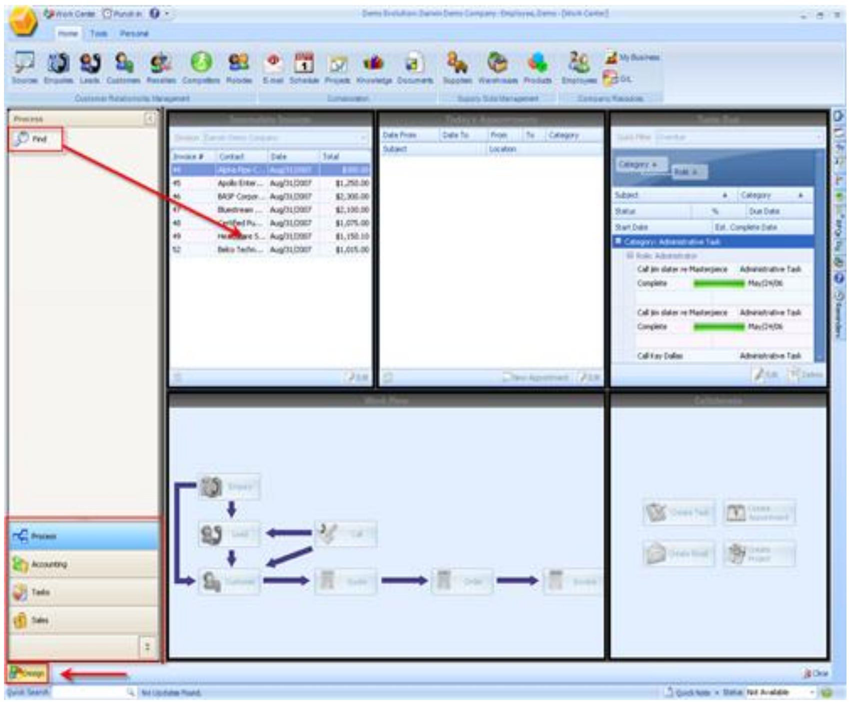
The screen view below illustrates the Work Center in design mode when it has not been configured.

Insert screen view here

To access the Design Mode click the design icon 

found in the lower left hand corner of the main window you see when you log in to Tradepoint.

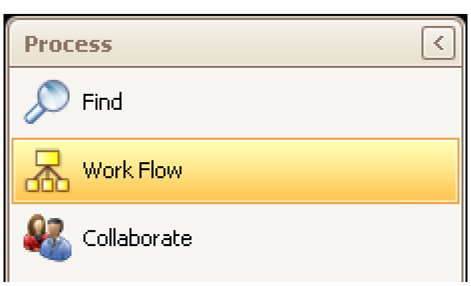
A menu will appear on the left hand side of the screen with drag and Drop controls for you to choose from. Each type of Drag and Drop tool will be listed under the main icons you see below on the lower left of the screen.



Each of the icons labeled Process, Tasks, and Sales have different controls within that group that you can choose to be in your Work Center by dragging them onto the grayed out screen and dropping them where you would like them to be.

Process - Process includes three sets of functions grouped together. They are shown in the example above. 'Find' includes all the searching tools you need to search for anything in Tradepoint. Work Flow is a series of tools allowing you to generate open orders, Quotes, Invoices, Call Logs which you then assign contact information to after the fact and tools to generate new contacts.

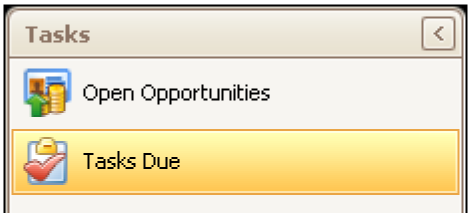
For example, if you are in a Call Center, the Call Center icon will open a new unassigned Call Log for you automatically. You can assign the Call Log to an existing Customer or create a new Customer file after the fact. In the case of Orders and/or Invoices an open order or Invoice will be generated where you can create a new contact after the fact or assign existing contact information after the Order or Invoice has been created.



Tasks - Tasks includes a set of functions that can be dragged and dropped onto the grayed out part of the window. The icons included under the Tasks icon will be shown in the left side of the screen the same way the Process icons are shown in the example above. Open opportunities can also be utilized and is an ideal tool for sales force automation and management.

For example, a Sales Manager would be able to view all of the Open Opportunities to any sales people assigned to him and a CEO would be able to view any Open Opportunities within the entire company.

Any Open opportunities would be listed here in the format shown in the example above. Double clicking on any listed Opportunity would open the details screen allowing you to drill down into the details including any attached Tasks, Documents, Appointments and Past Forecasts associated with a specific Open Opportunity.

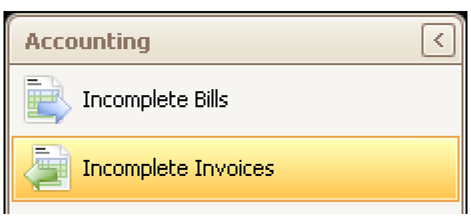


Sales - The Sales icon includes Sales Forecasts and built into the group of drag and drop controls. This is a graphic visual of the Open opportunities tool ideal for Sales Managers or CEO's looking to have an over view of all sales activity.

Projected Sales is the graphic view of Open opportunities that will show all Open Opportunities in a bar graph form for all sales profiles within your organization. This is an ideal tool for executives and Sales Managers looking for an over view of all activity by Sales Rep.

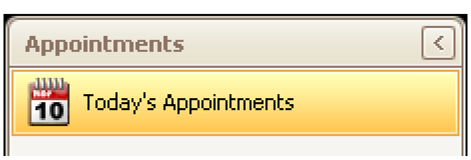
Accounting - View any incomplete Invoices or Bills as the occur within your Company. Go directly to that Bill or Invoice by clicking on any one that is listed in this section of your Work Center dashboard.

Ideal for Accountants and managers to ensure that every transaction is Invoiced and that all Bills get completed and processed in a timely manner without slipping through the cracks.



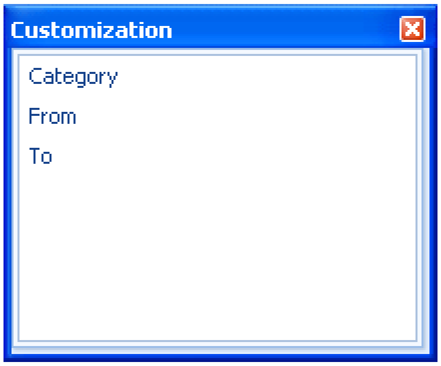
Appointments - Your Daily appointments can be viewed here at a glance. New Appointments can also be created directly from your Work Center dashboard.

Keep track of daily Appointments at your finger tips. This function will update any changes in your schedule when you click on the update icon in the lower left of the Appointments section of your Work Center.



Once you have configured your Work Center you can redesign your Work Center can be adjusted or redesigned by clicking the Design icon to access Design mode. When you are in Design mode icons and groups of icons can be dragged from the main window back into the tool bar on the left of the window so you can start again. They will automatically be associated with the correct group of icons so you can adjust or start over and redesign the controls of your Work Center.

Some of the tools such as Appointments will have fields that you can adjust or remove within the tool. Simply right click on that section to open the Column Chooser. Drag and Drop any of the fields from the tool into the Column Chooser or vice-versa.



Closing the Column Chooser will save your changes automatically.

Most of the tools within the Work Center are dynamic and will update your information. The image below shows Appointments and the update icon in the lower left hand corner of the window. Clicking on that icon will automatically update your Work Center with the most current synchronized information in your Tradepoint. Logging in and out of Tradepoint will also update your Work Center. For the tools that do not show the update icon they will update as Tradepoint synchronizes.

Tools & Usage

Flyout Panel

Setup & Configure

Each Panel within the Flyout Panel has built in field that can be dragged and dropped to show exactly the information you want to within your Company. If your Flyout Panel has not been setup to date you won't receive any Reminders for Appointments, Call Logs or Tasks or any other updates concerning Outstanding orders or Inventory warnings, for example.

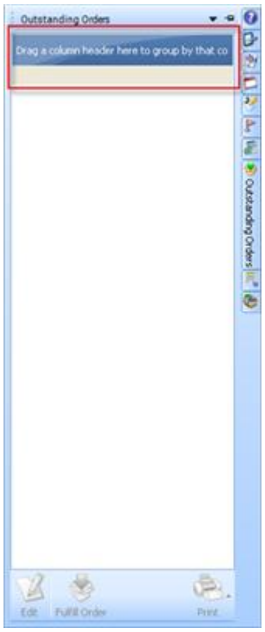
Configuring or setting up your Flyout Panel is a straightforward process that can easily be repeated within each section of the Flyout panel.

Below is and example of a Flyout Panel that has not been configured.

This is the section which will show any outstanding orders as they come due throughout the day. By right clicking on the grey field you will have two options. Choose the 'Column Chooser Option to be able to choose which fields you want displayed in your Flyout panel Options.

The box shown below will open when you click the 'Column Chooser' Option. Clicking on any of the options and dragging it to the top of the Flyout Panel will create the structure necessary to receive live information about your outstanding orders.

If you have orders within your system and are configuring the Flyout panel for the first time you will see the outstanding order information come into your Flyout Panel as you configure it.



After you have specified which fields you would like to display within your Flyout Panel you will see an image similar to the example below should you have existing Orders within your Tradepoint.

The example you see here shows the fields configured for Outstanding Orders. The status field has been dragged and dropped into the Header field. This will create a expandable menu for Different Statuses pertinent to your Outstanding orders.

Any one of the orders can be fulfilled by highlighting that Outstanding Order and then clicking on the Fulfill order icon to start the Fulfillment Wizard for orders.

Email

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.

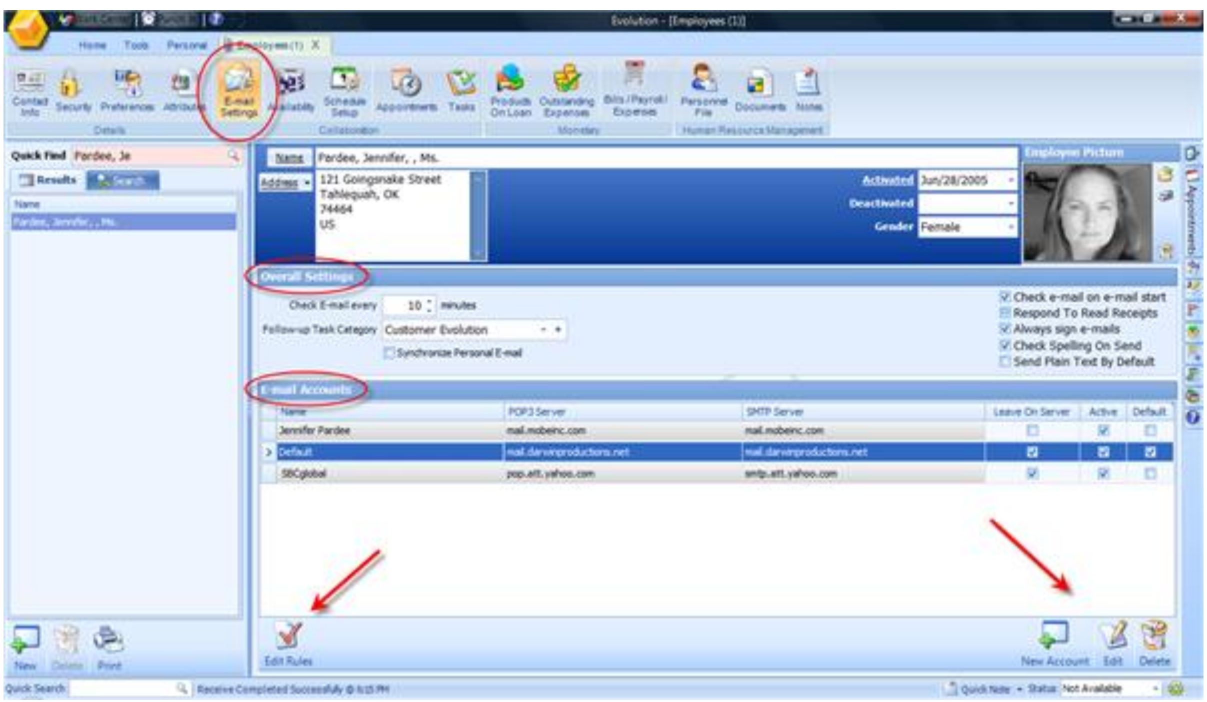
Employee Email Profile Setup

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.

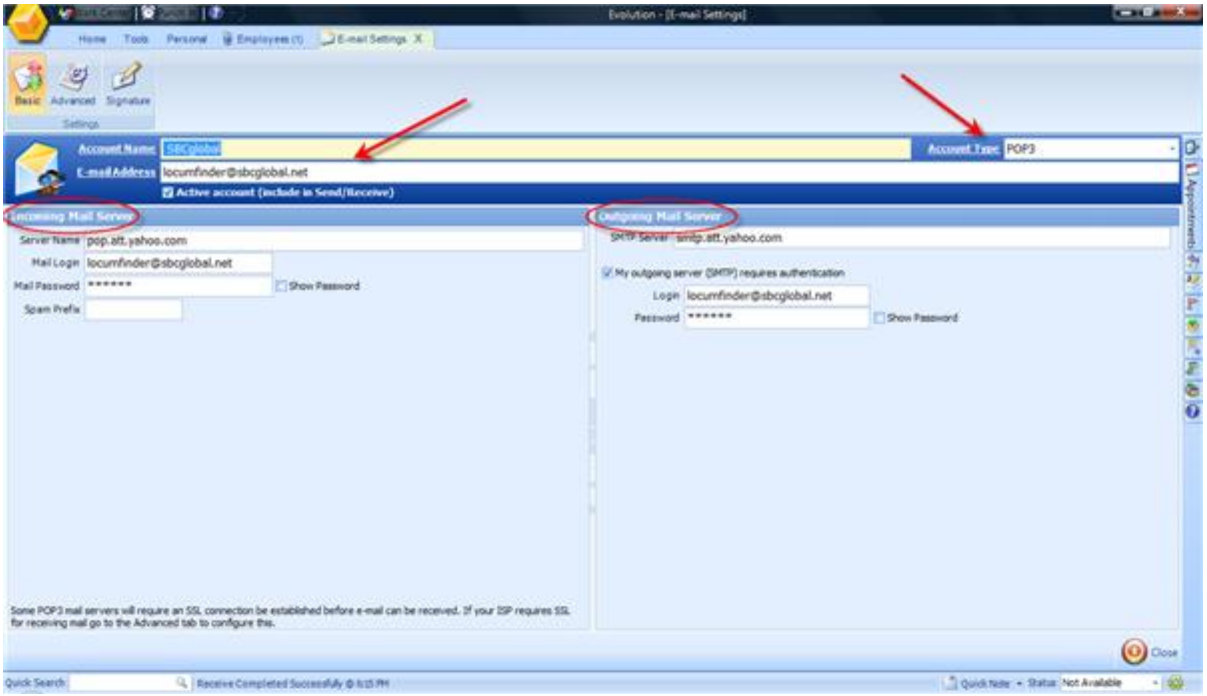
When you click on the Email Settings icon you will be directed to a screen like the one you see below.



Icons for *Creating a New Email Account* or *Editing an Existing Email Account* are found in the lower right corner. The 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.

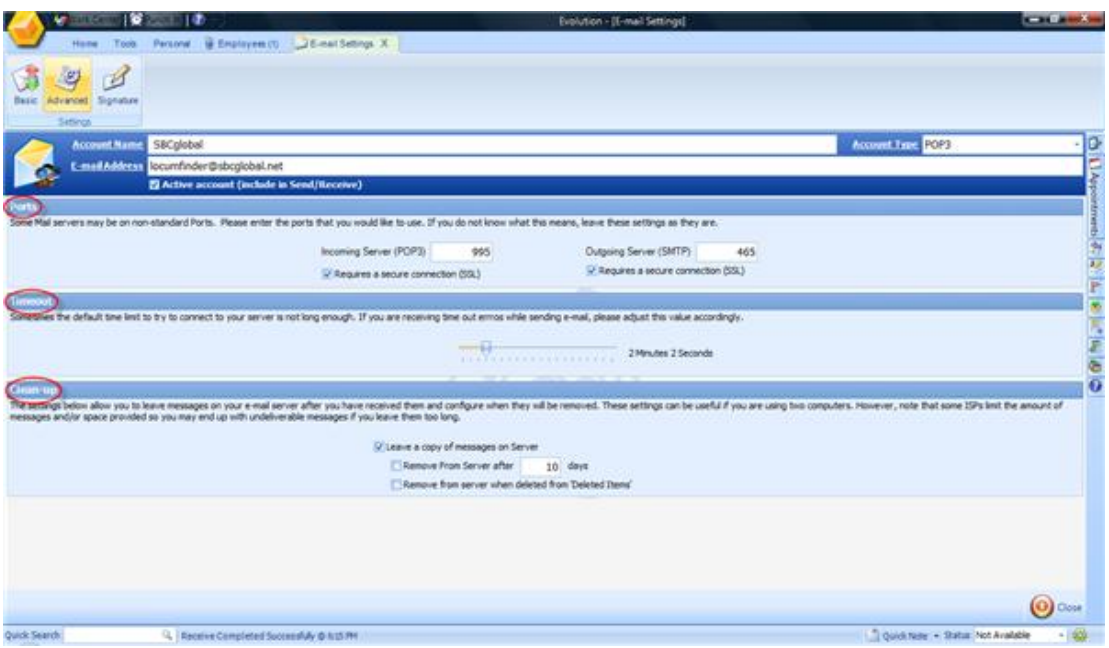
Your Email SMTP Server Settings will be entered on the screen you see below to create a new Email account.



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 external email settings, Tradepoint will search for Incoming and Outgoing Server settings and populate the fields with data that has been retrieved. Double check your settings.

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



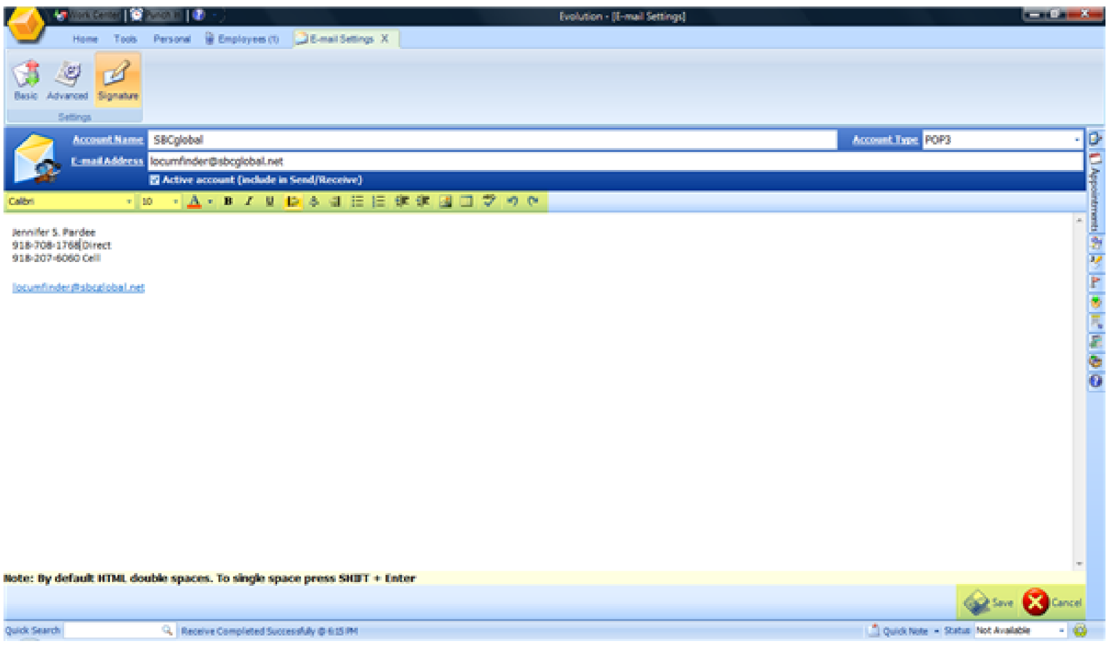
The screen for detailed email port settings is shown above. When your SMTP information has been entered the more detailed settings should populate if you are connected with the Internet when you set up your Email account.

If you are not connected to the Internet at the time your Email account is established, then the next time you login to Tradepoint and to a "Send/Receive" from the main Email then you should start downloading your Email automatically.

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.



Email signatures have a built in tool bar at the top of the screen (highlighted in this image) to format your signature and add in your logo or image as necessary. Click the Save icon in the lower right when you are finished.

Email Functions

So much in business starts with Email and ends with Email. As a result, Tradepoint Email includes a set of Collaborative tools designed to transition from Email to actions. At the top of your Email window you will have icons to create a new Task, Call Log or send an Email to a contact from your Inbox.

Tradepoint's Email Client contains many of the basic features that come in an email client. Most of the email tools can be found in the top tool bar as well as the folder functions along the side and lower left of your screen.

Features include:

- The ability to create, edit and re-arrange folders
- Print, print preview, reply, forward, send, and receive messages

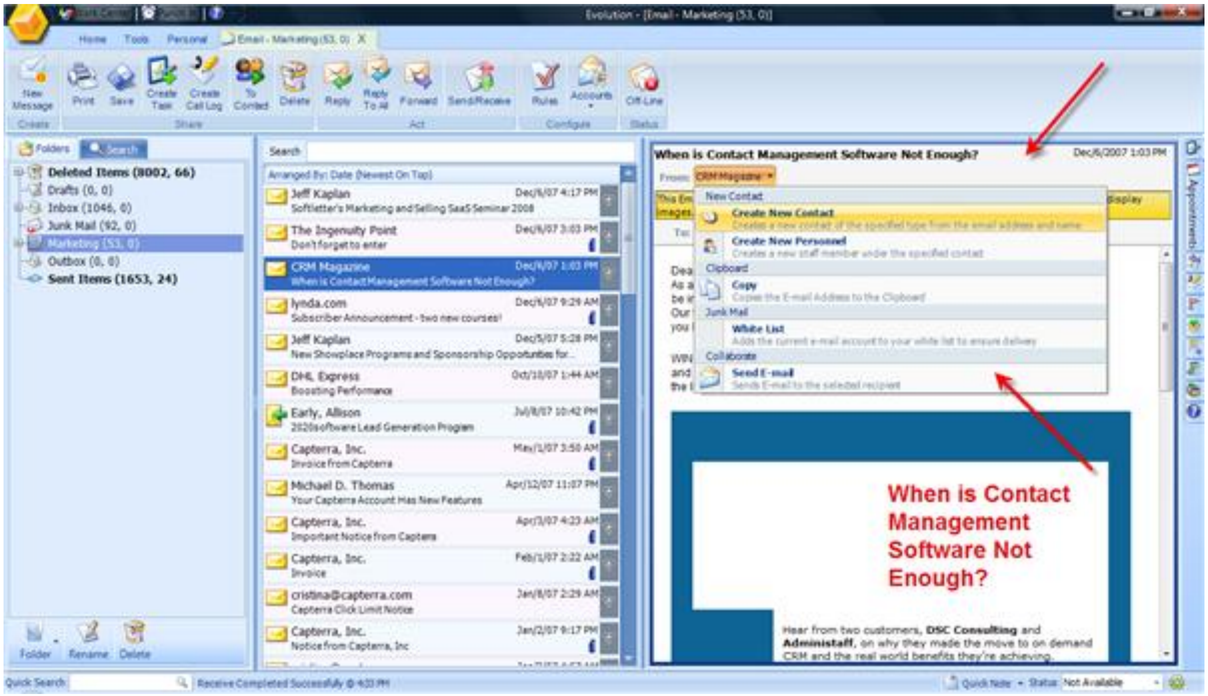
- Access email rules from main Email screen
- Access any of your Email Account Settings
- Search tool at the top of emails to search on Inbox messages with keywords
- Collaborative Tools for actions performed directly from Emails
- Detailed Search Tool under Search tab for detailed searches on all emails

Most of your tools are highlighted in the tool bar and the folder structure is on the left of your screen. Icons to create and Edit your Folder structure are on the lower left.

Creating a Contact from Incoming Messages

Create contacts from incoming email messages by using the drop down menus seen in the incoming message screen.

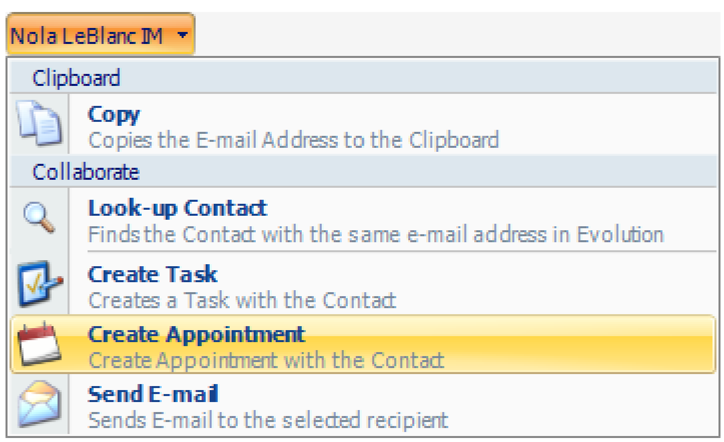
Each message will have a menu attached to both the Sender and Recipient on each incoming message. If you do not already have the Sender's email in your contacts you will have the menu you see in the image below as an option.



Each one of these options will redirect you to the necessary screen to:

- Create a New Contact; so you can enter in any other information on the contact screen.
- Create a New Personnel Contact; you will be able to enter in any additional information on the screen.
- Copy the email address; for use in another document or program.
- White List this email address so it won't be directed to SPAM.
- Send an Email; this will open new email window with this email address in the Send To field.

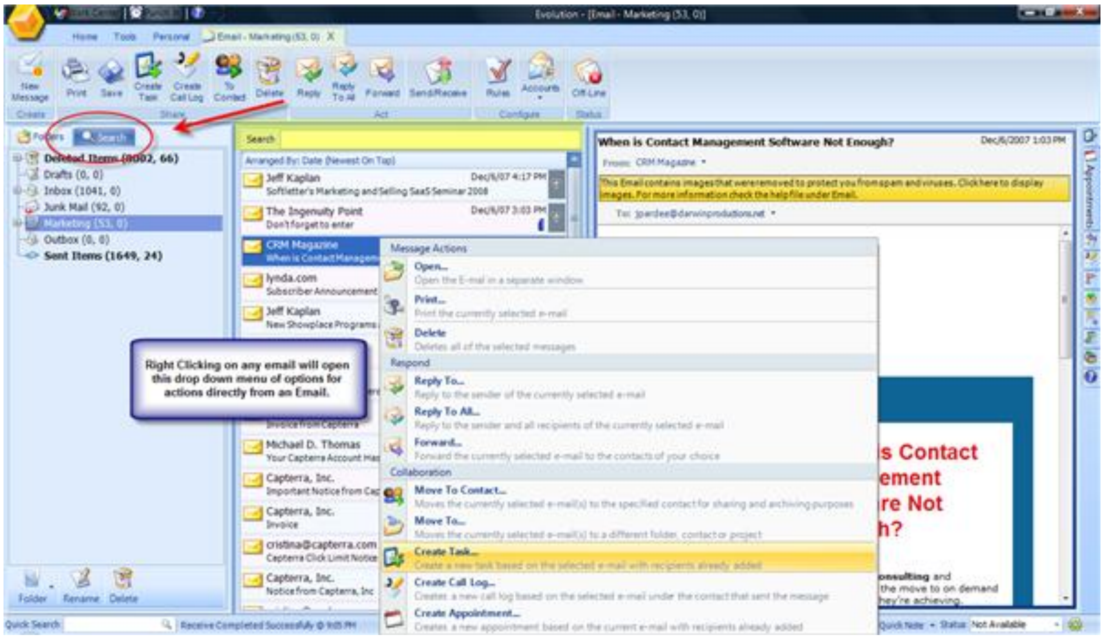
If you already have a contact in Tradepoint then the drop down menu that appears in an incoming message will be what you see in the example below.



This is an abbreviated version of the larger right click menu functions from any listed message in a folder. These options will take you to the resulting action and the message information and any attached documents will also follow into the Task, Appointment, or Email.

Create a Task from an Incoming Email

Right clicking on any Email will open the menu you see in the image below for easy access to different collaborative tools. To create a task from an incoming email choose the third option from the bottom in the menu below.



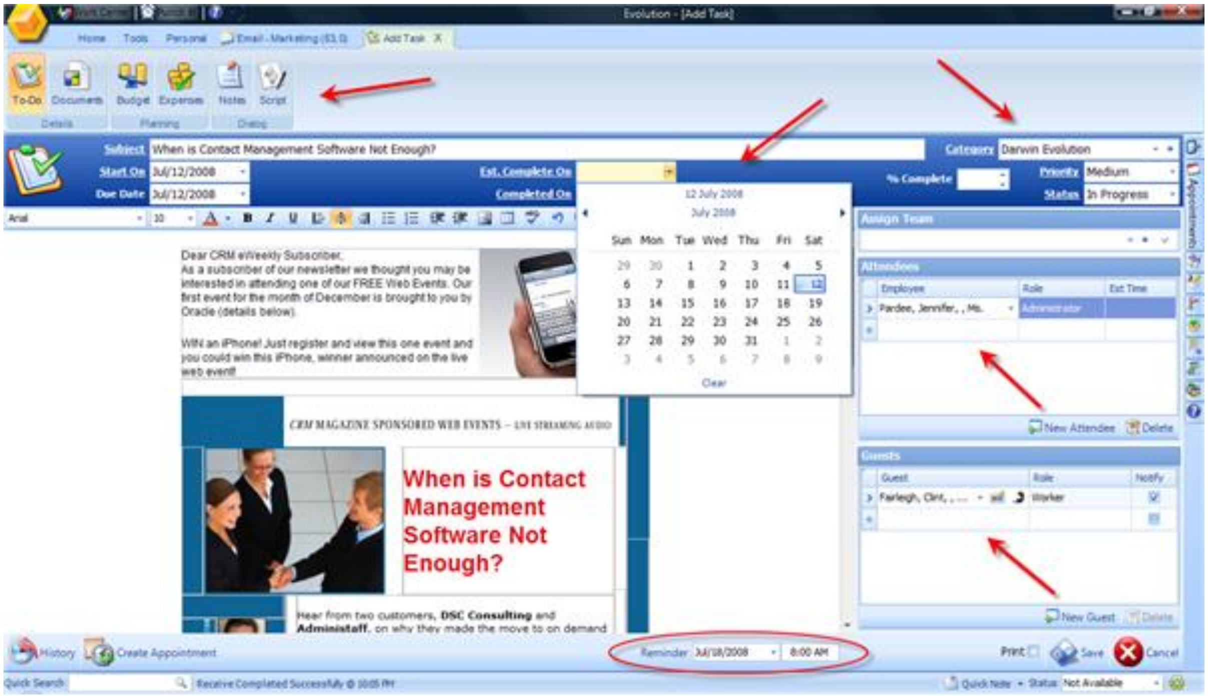
Each of these menu options will redirect you to the necessary screens to complete the actions.

Creating a Task from an Email that is highlighted above will automatically do the following:

- Bring in any Documents into the Task that were attached to the Task.
- Add any contacts from the Email into the Task(if they are already in your contacts)
- Bring in the message content (including images) into the main information screen for the Task.

All you will need to do to complete the Task will be to:

- Add the date with the dynamic calendars
- Choose a Category
- Add any other Employees or Guests
- Add a Reminder if necessary



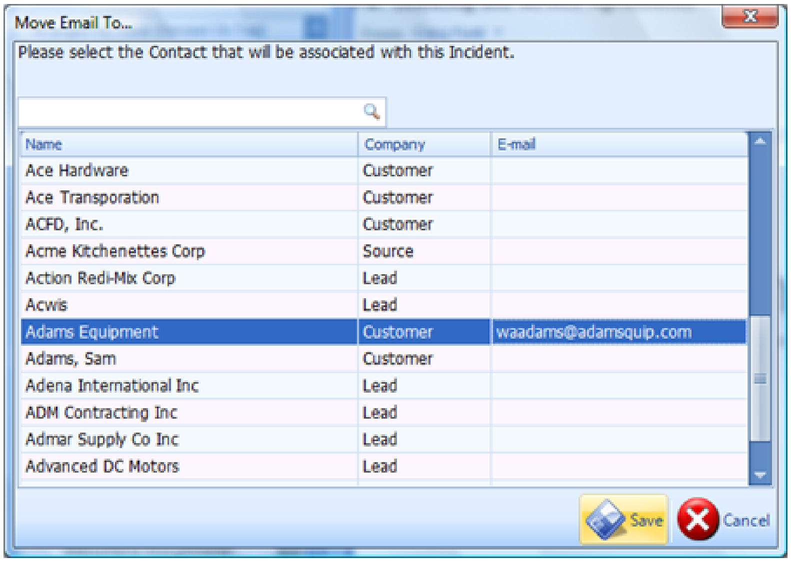
To create a Task or Call Log the process is the same. Simply right click on an existing message and choose the Create and Appointment or Create a Call Log option and fill in the remaining information on that screen.

Create a Call Log from an incoming Email

The one right click tools from Email will also create a call log from an incoming email just as easily as a Task. A Call Log from an email is designed to create easier work flow patterns for:

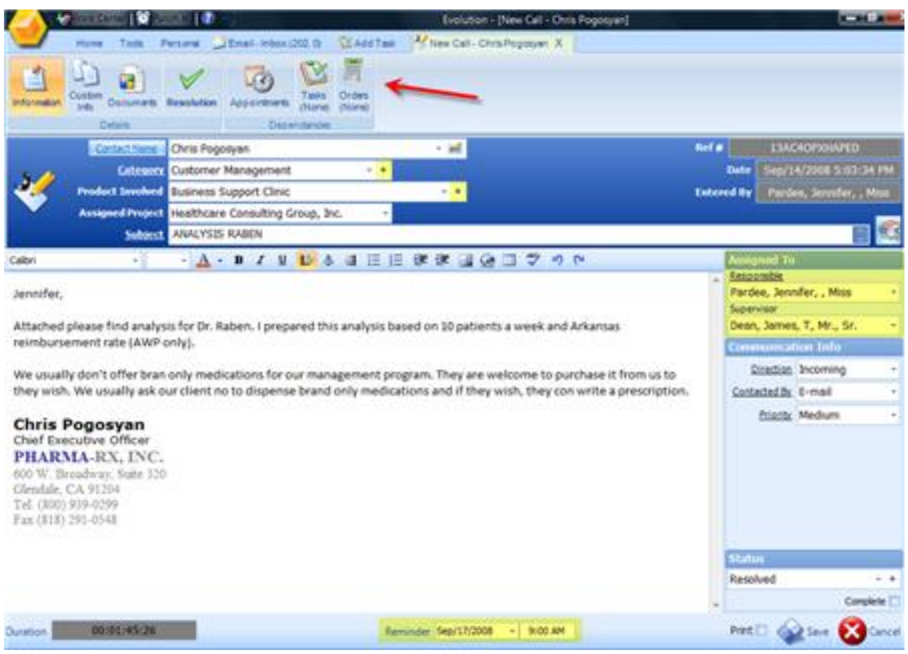
- Customer service: from an email or web request
- Follow up on Service Requests for existing equipment or existing orders
- Email based service calls for warranty work on any existing products

Right clicking on an email will prompt you to choose a contact or Project to associate your Call Log with. The more detailed information you enter here the more specific your results will be.



Double click on the highlighted option to associate the Call Log with the contact/project of your choice.

Similar to Tasks right clicking on the create a call log option will pull in the recipients(as Attendees) to the email, contacts(as Guests), attached documents(will be posted under documents), and content of the email within the main Notes section.



When a Call Log is generated from an email the following options will be available:

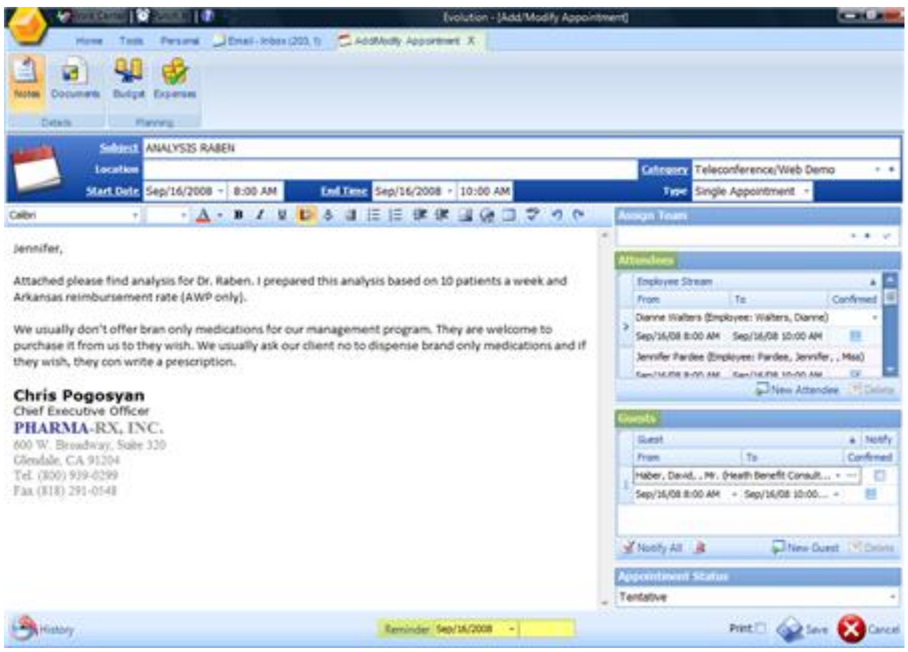
- Category - The drop down menu will show your specified options. The Blue plus will allow you to create Categories on the fly (if your security permissions permit).
- Products Involved - This will draw from the items within this Customers Products Owned purchase history.
- Assigned project - If relevant associate the Call Log with a specific project
- Assigned To: This will notify the Employee in the 'Responsible' field that they have a new Call Log to complete.
- Supervisor - This will notify the Employee's Manager about the Call Log.
- Direction, Contacted By, Priority - These will have drop down options detailing the status of the Call Logs.
- Status-A Required field to choose from the options before you Save the Call Log. This typically will contain Statuses that indicate the Resolution type of a Call.

Any documents you had attached to a Call log will be attached to the Call log for easy access by all who are related to a Call Log.

Create an Appointment from an Incoming Email

The create an appointment from an incoming email allows you to create Appointments directly from an Email. This is the most popular tool since much email traffic revolves around scheduling various events.

With the Create Appointment tool you will be able to add the recipients, guests and attachments in just a few clicks to your schedule. Anyone you are sharing your schedule with will be able to view the appointment as soon as it is created.

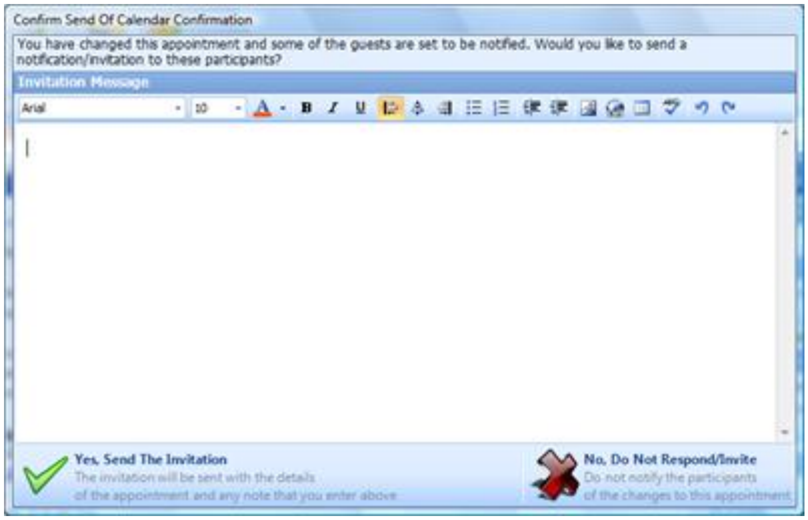


Similarly to Tasks and Call Logs if there are any email attachments you will be prompted to add them to the Appointment.

Any Employees that are added to the Appointment will be notified through alerts and through the Flyout Panel as Tradepoint synchronizes.

The reminders screen pops-up when the Appointment is saved. The content you see in the Appointment above will appear in addition to anything that is typed into the notification screen.

Easy Use Tip #4: *When an Appointment is edited the notification screen pops-up each time a chance is made to an appointment. Within your email notifications (in your employee profile) you can set an option to turn off these notifications.*



Email Notifications will be sent to the email of the contact you have on file. If there is a contact but no email then the email notification will still come up but no email will be sent.

Attachments being added to an Appointment will appear under the documents icon in an Appointment.

Any Employees added to this Appointment will have access to the attached documents.

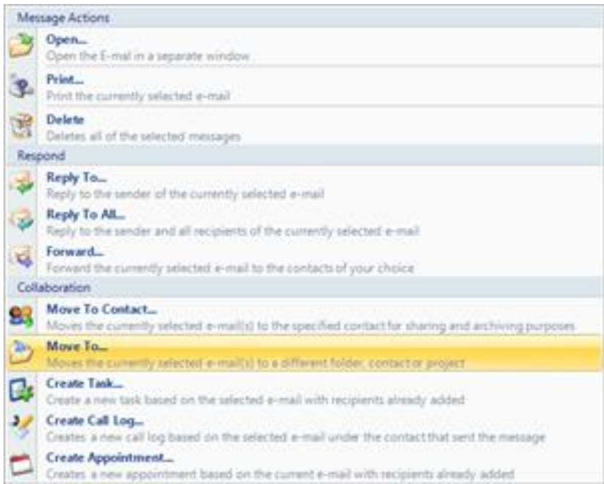
***Easy Use Tip #5:** Anyone you are sharing your calendar with will also have access to the Appointment and its contents unless the Category has been set to 'Private Appointment' status. This is set on a category through the blue plus next to the Appointment category by checking off the 'Private Category' box.*

Move an Email to a Folder, Contact, or Project

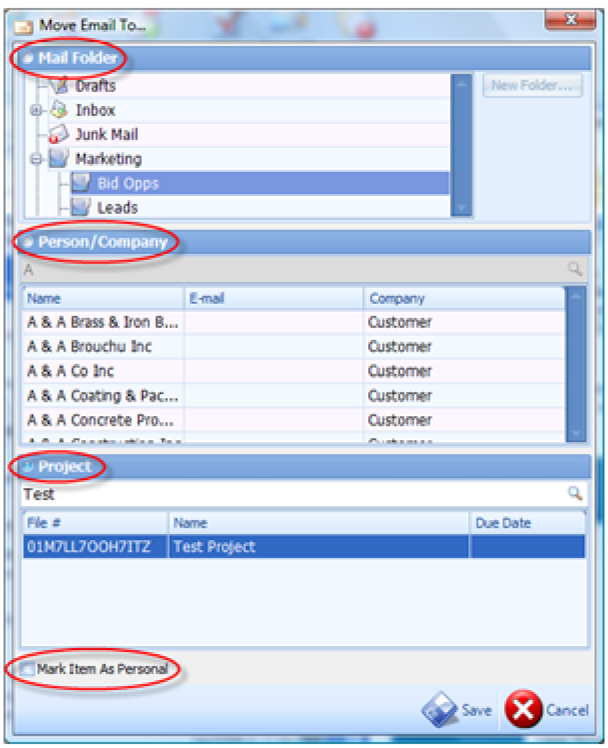
To move an email to a contact or project, using the move email option follow these next steps:

1. Right click on an Email message to bring up the following menu:

2. Choose the 'Move to Contact' or 'Move To' option. Move to Contact will direct you to choose a contact to send the email to and move to will open another screen to choose from a Folder, Contact ort Project.



The image below shows the 'Move to' options for you to move emails to various locations within Tradepoint.



There are three options for moving emails:

- A different Mail Folder
- To a Person/Company Contact
- To a Project

The Contact and Project option has a search tool for Keywords or names to select a more specific option.

Each contact will show an existing email address and Contact Type for specific options.

The Folder option has a scroll bar on the right to see the entire folder structure available.

The 'Mark item as Personal' option will make an email only visible to yourself as the person who has moved the email from your inbox to another location in Tradepoint.

To move multiple emails at a time you have two options.

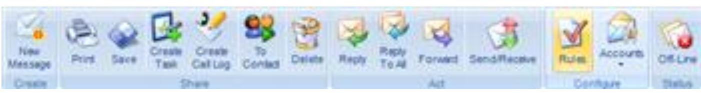
1. Go through the email folder and hold down the Control key while choosing select emails with your mouse. From there choose the option necessary to move to a folder, contact or project.
2. To remove or move multiple emails in a large group hold down the Shift key and scroll to the necessary location and click on the last email you would like removed. All of the chosen emails will be highlighted and can then be deleted or moved to the preferred folder, contact or project.

Email Rules: Tools to Manage your Email

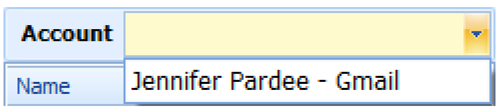
For people who have needs for different types of Automation Tradepoint allows you to create email rules which apply to incoming messages.

This is designed to assist those who have large amounts of email in managing the resulting actions prompted by those emails. For example, web based sales orders, returns and refunds are just a few examples of how the Email Rules can assist in managing your incoming email traffic.

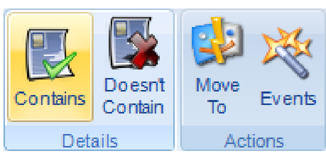
From your Email Account the Rules icon is highlighted and found in the main tool bar.



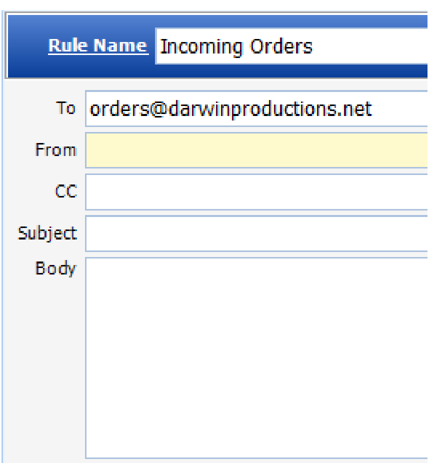
To create a Rule, choose the Email Account your Email rule will be associated with:



From there you will see several icons at the top of the page. Each one will provide options concerning your Email rule.



Each of these icons will let you define specific terms for each of your Email rules. The highlighted 'Contains' icon will direct you to a screen where you can define what the incoming email contains.



Each field shows options for how an Email rule can be defined for incoming messages.

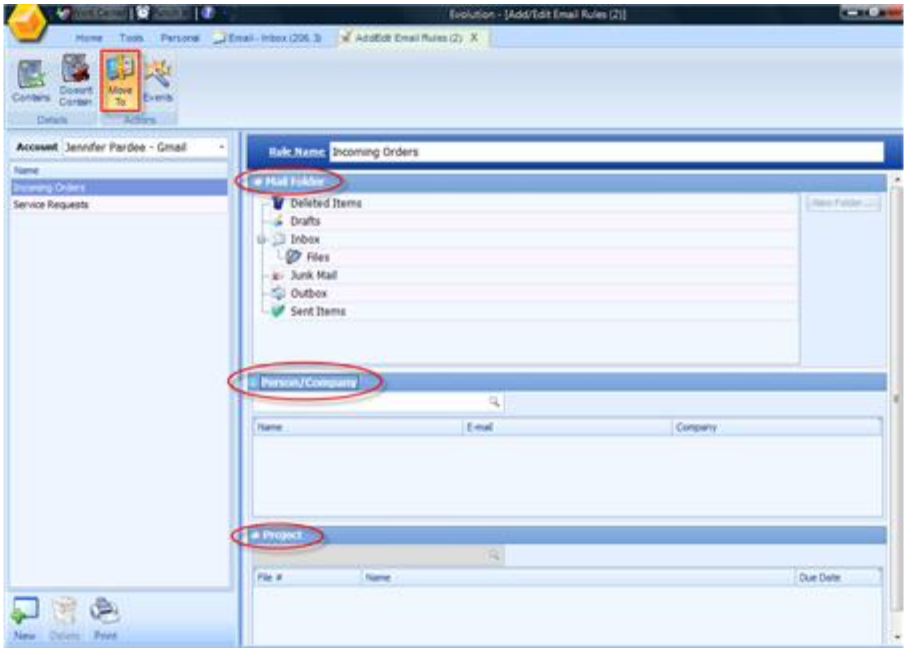
An example would be all orders, sales, service requests or even returns can be parsed to a specific person/contact, project, or email folder (which can then be accessed by multiple parties if using Exchange Server for Email) to be processed through your day .

This way any regular email traffic won't get lost in a higher volume of emails and any orders, sales, service requests or returns won't be over looked either.

Just as an incoming email can be defined by what it contains, it can also be defined by what it doesn't contain.

The 'Doesn't Contain' icon will direct you to a screen that looks just like the 'Contains' however, an email will be parsed out based on what it does not contain rather than what it does.

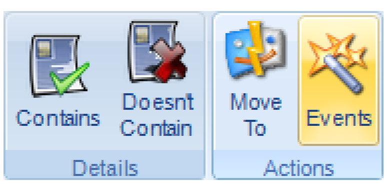
After an Email Rule has been defined by the properties of what it does or does not contain as an incoming message the next step is to define what happens to that message after it has been defined. The 'Move To' option will direct you to a screen where you determine the action that happens next.



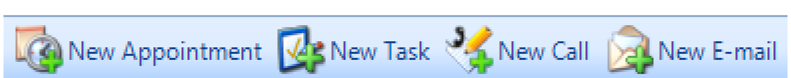
An incoming message can be moved to a Folder, Contact File or Project. (You also have the option of creating a New Folder from this window). From this window, click on the round button and then specify the folder, or search for and specify the contact or project.

Tradepoint also provides tools to prompt events (that have been defined by the user) based on these email rules.

The events icon will direct you to a screen where you can prompt a Task, Call Log, Appointment or Email as a part of an Email Rule.



You see the rule name showing at the top and the bottom of the screen will show the icons to create and specify Events for that rule.



Each email rule can have multiple Events if that is necessary.

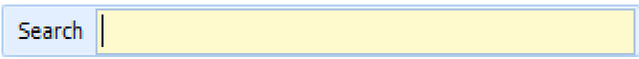
For example, in the case of a service call you may want to define a 'New Email' plus a 'New Call' that will happen when an incoming email comes in. This will provide a seamless experience for the person emailing you through your website as well as internal alerts and notifications for specific individuals as to the events they have to complete or follow up on.

Your Email Rule will be saved when you close the window.

Email Quick Search

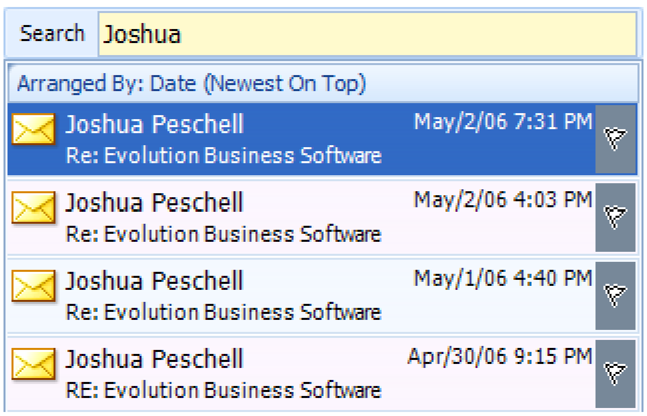
Tradepoint Email contains an email quick search and a detailed search feature. For folks who end up with hundreds if not thousands of messages looking for one specific one can be time consuming especially if the message in question was from months ago.

The Quick Search feature is one field from the main email box.



Here you can type all or part of a word, name email address or any search term and results will filter out as you type. This function will apply to the folder you are viewing (which will be the Inbox as default) the Quick Search tool will apply to any folder you click on for quick searching. So, if you have a search term in the Quick Search field and switch folders the search tool will search within the folder you switch to.

Quick Search results will look like the example below.



Email Advanced Search

Advanced Search options are found under the Search Tab next to Folders on the left of your screen.

The email advanced search tool will allow you to set very general or specific criteria and will also search within the entire database for files and not just your email box. This means that any emails that have been sent to contact or project files are also search able using this tool

Example:

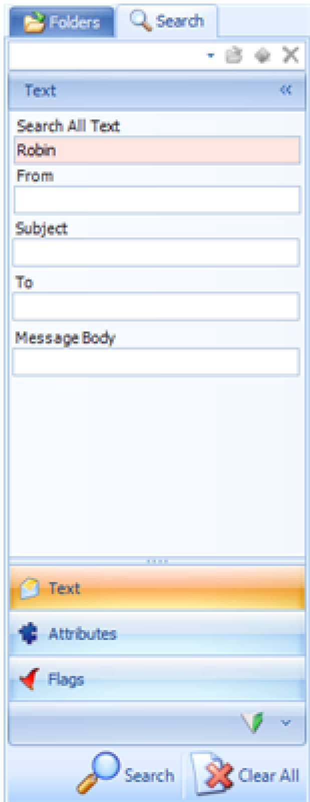
The Advanced Email Search tool will also allow you to have multiple criteria such as an email sent from between July 1, 2008 to August 1, 2008 from a specific contact that had an attachment but… I cannot remember her name.

So, I would do a specific search and enter in her name under the **Text** option and then click on **Attributes** and check off the Attachments box and enter in the date range.

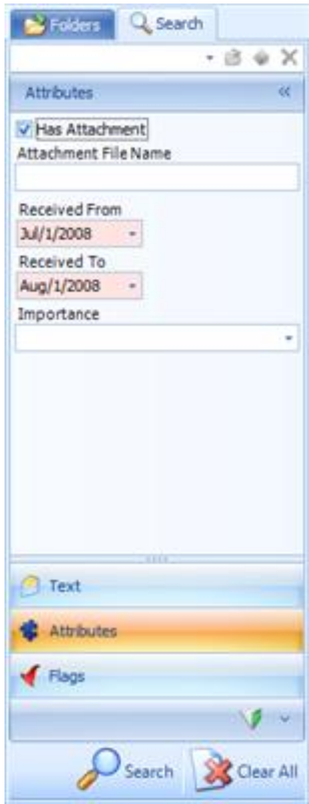
The last criteria would be under **Folders** and since I don't know where the email is I will search **'All of Tradepoint'** instead of choosing a specific folder by checking off the Folder options.

I would then click the search icon at the bottom and wait for the results to come back. Depending on the volume of emails within your database and email box will have a direct effect on how fast your results are returned.

The following slides depict each step of the example above:

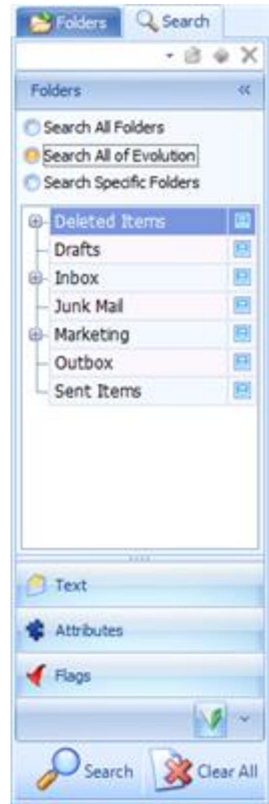


1.



2.

3.



4.

The contact's name is entered into the "Search All Text Field". If other information was available it could be added as well or instead of just the name.

The next steps show the check box for 'Has Attachments' checked off and the date range entered in the date fields.

Since there are no flags on the message we can skip this option.

The options here allow you to search All Folders, All of Tradepoint, or specific folders. Only the 'Search Specific Folders' option will require you to check off which folders you want searched.

The folder structure within your email account that you are searching in will be reflected in the search tool.

When you have specified where you want to look then click the Search icon. Your results will appear when the search is complete.

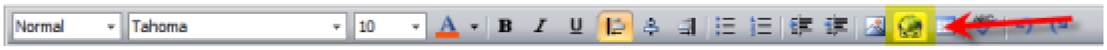
Add a Hyperlink to Emails & Publications

Inserting hyper links can be done using the hyper link tool into numerous locations within Tradepoint.

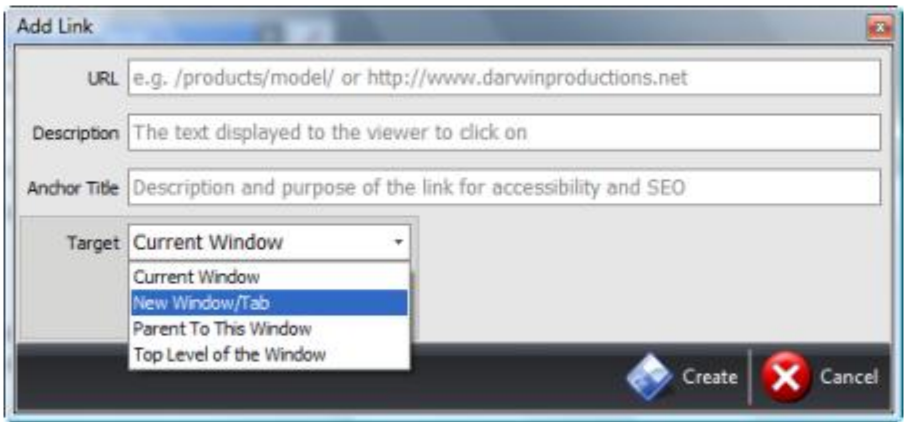
- Emails
- Email Templates
- Knowledge Base articles
- Teaser and Overview Descriptions for Products

- Press Releases
- Mass Email Tool

Each one of these uses the same tool to enter in a hyper link to any one of the listed publications. The hyper link icon appears in the tool box at the top of the content screen in each of these locations.



Clicking the icon opens a menu to create a direct link and modify its appearance for the recipients.



URL - The actual URL address of the web link or link to download a resource(document).

Description - The hyper linked text you want displayed in your email or article.

Anchor Title - Any SEO keywords and description of link to enhance search ability on the web.

Target - Options for how the link will be opened within the recipient's browser window.

Once preferences are set click the Save icon and the hyper link will appear. To adjust the settings of the hyper link click the hyper link once and then click on the hyper link icon to adjust existing settings.

Adding an Image to an Email

Employee Profile & Setup

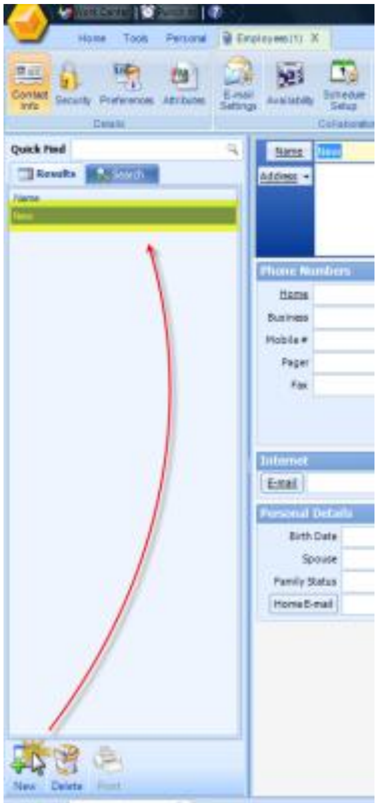
Providing access to Tradepoint is done by creating an Employee profile in the Employees section of Tradepoint. Once an Employee profile is created and a Login/Password established an Employee will be able to login on their machine directly or any other computer in a company with Tradepoint.

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.



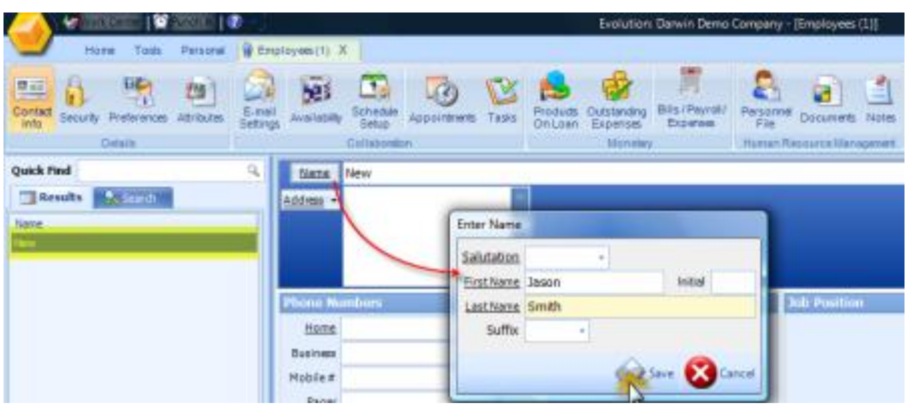
The only required fields on the Employee Contact Information page are Name, Address, and Home Phone Number.

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

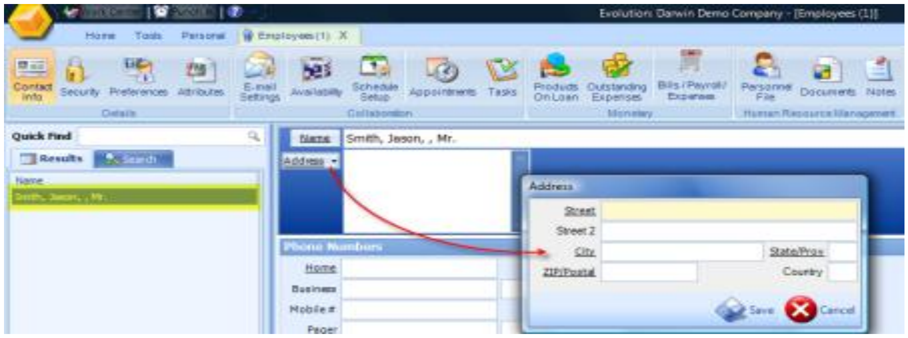
Note: Clicking the 'Escape' key on your keyboard will stop the new Employee account and take you back to the previous screen you were working on.

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.

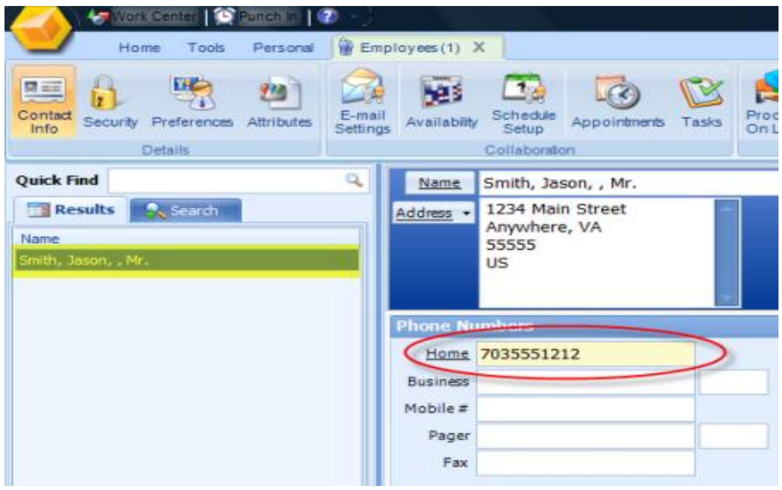
Employee Name (This only has to be entered once)



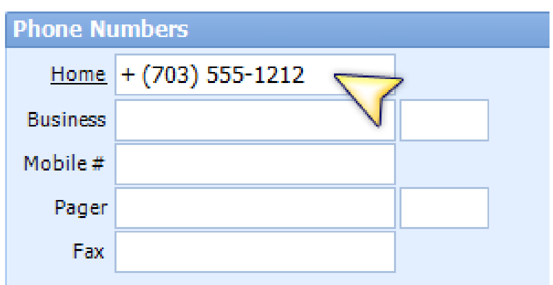
Employee Address (This only has to be entered once when the wizard or address format is used)



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



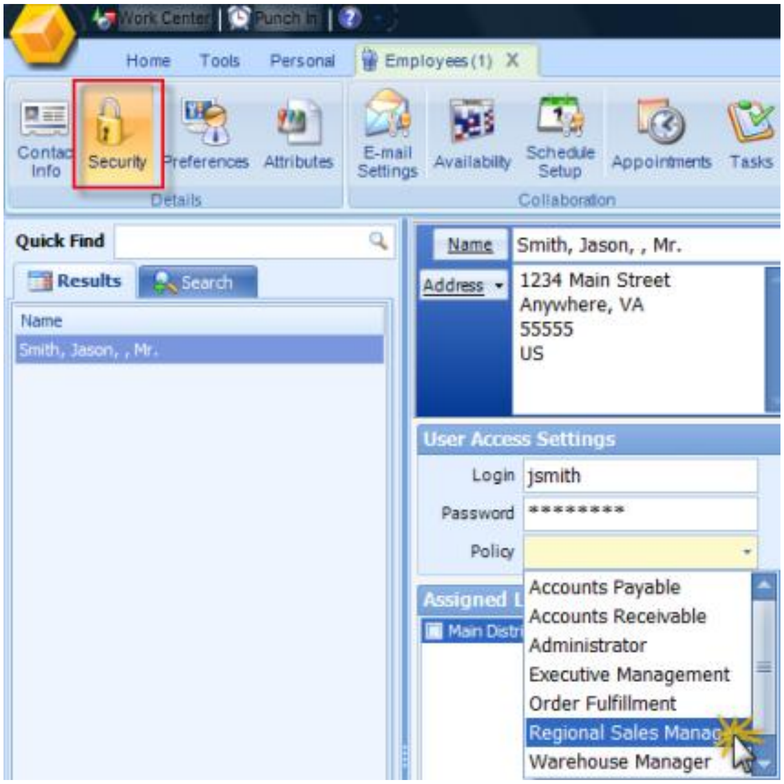
Phone number formatting will be consistent throughout Tradepoint with numbers being formatted automatically throughout all contacts.



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.

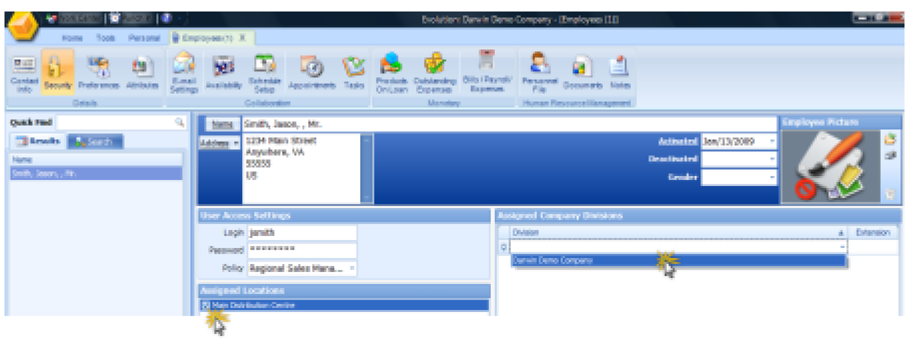
The password field will be coded so it will not be visible.

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.

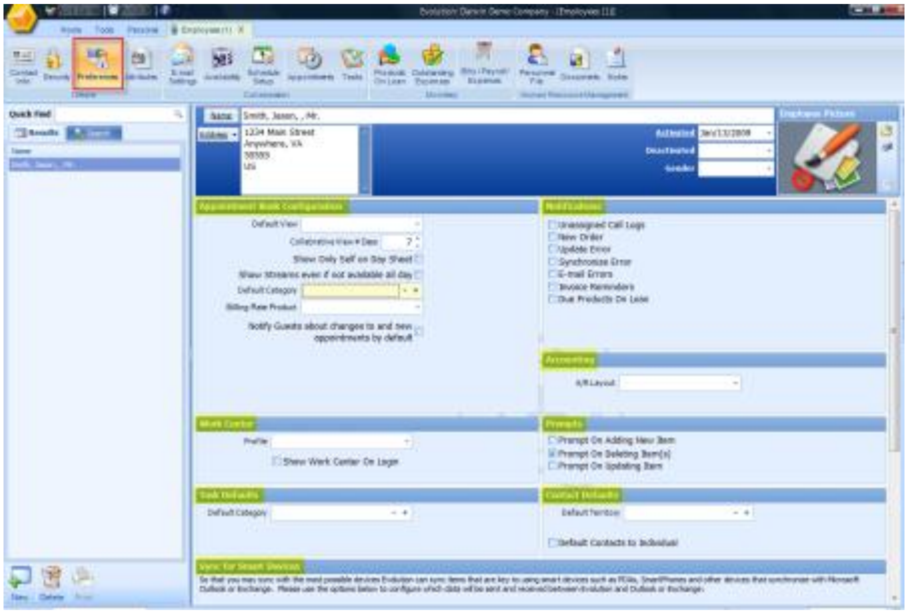


Employee Preferences – Define the User Experience

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.

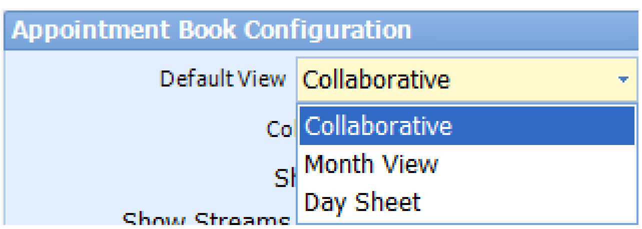
Preferences are on one screen within Employees.

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



Appointment Book Configuration

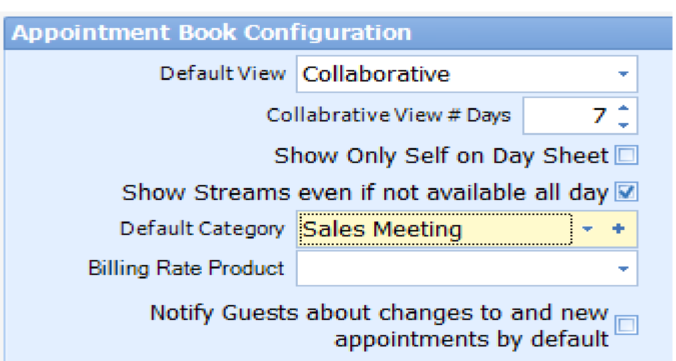
Appointment book configuration preferences shape how your Schedule looks as default settings. *Tradepoint does have Schedule settings that allow you to change your Schedule appearance as necessary.*



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

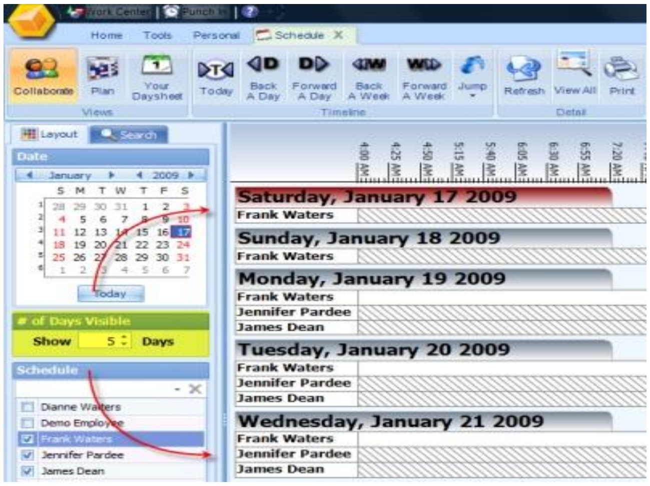
Month View – Shows a monthly view of the Schedule

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:

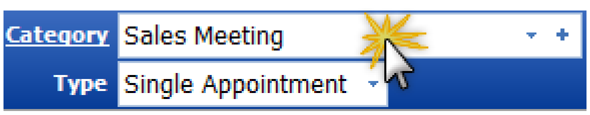
Collective View # Days - This will show as many or as few days as set of a Schedule (Applies Only to Collaborative View)



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)

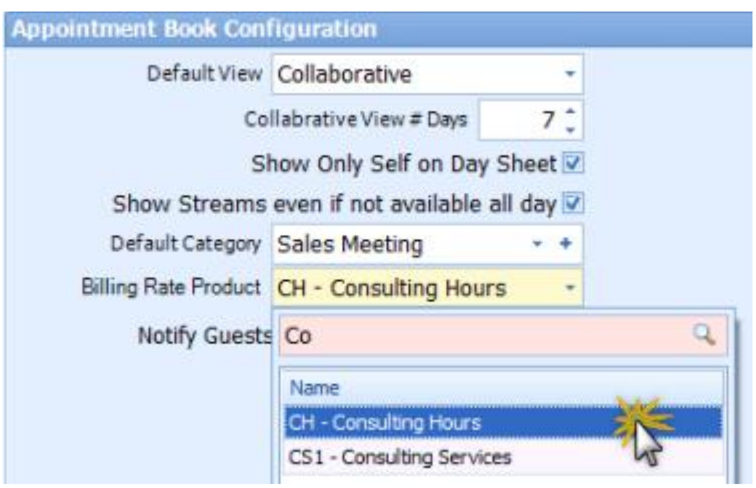
Show Streams even if not available all day - Will show a user's Schedule even if they are not available or scheduled for Holidays

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

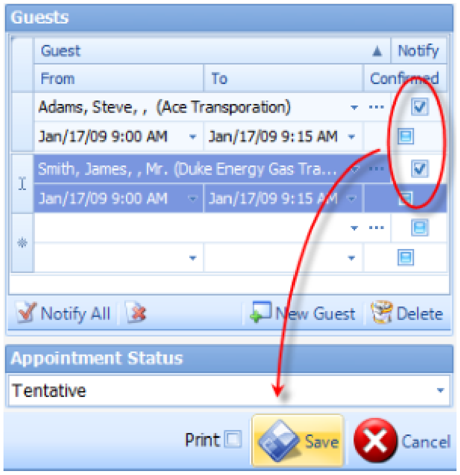


Billing Rate Product - Assign a Product which can then be invoiced against time scheduled by user (Applies to individual user profile only)

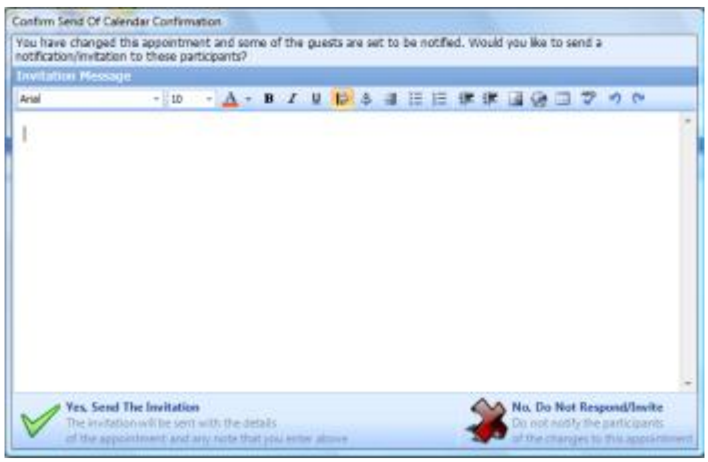
This will access the Products that have been setup within Tradepoint.



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.



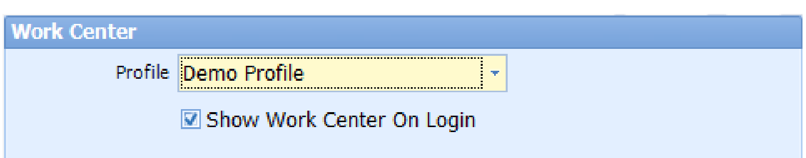
The email notification screen will then appear to send out a new appointment or any changes to an existing appointment.



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

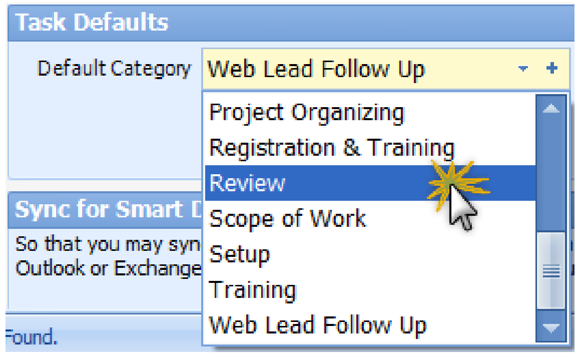
Set the Work Center profile and default to automatically show the Work Center when you login. Work Center profiles must be set up within Security Setting profiles.



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.

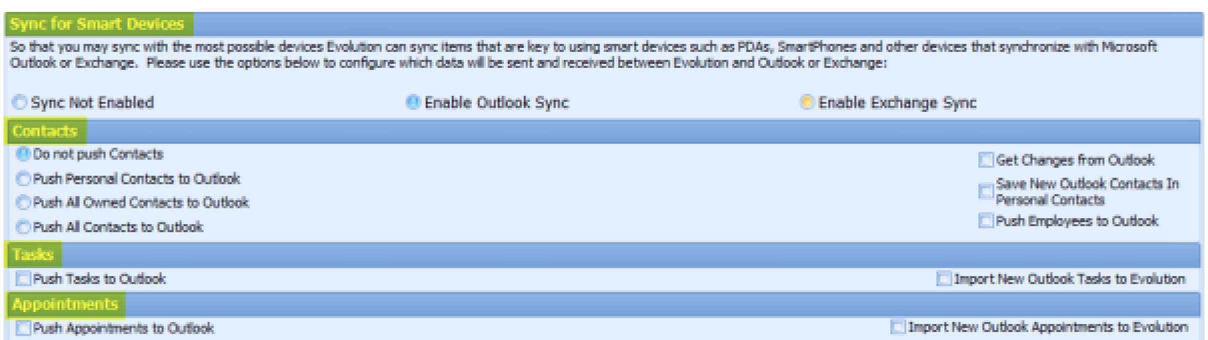


Synch for Blackberries & Smart Devices

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.

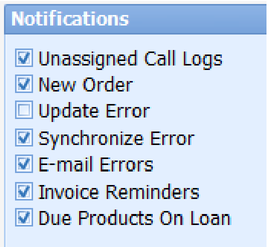


Be sure your settings are active on your Blackberry or SmartPhone are active for email.

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.

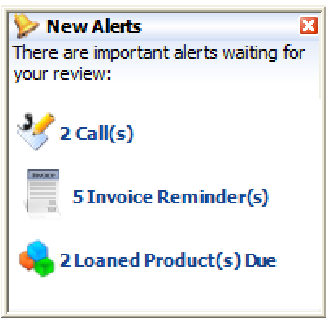
Notifications

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.



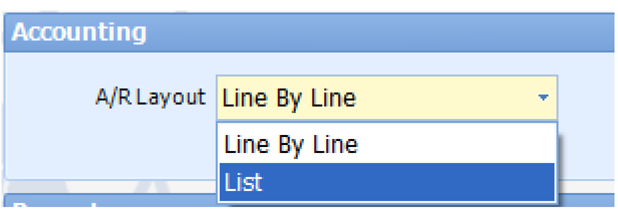
Update Errors and Synchronize Errors notify you of any errors in the updating or synchronization (this can also be affected by periodic Internet connection problems or any time outs in an Internet connection).

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)



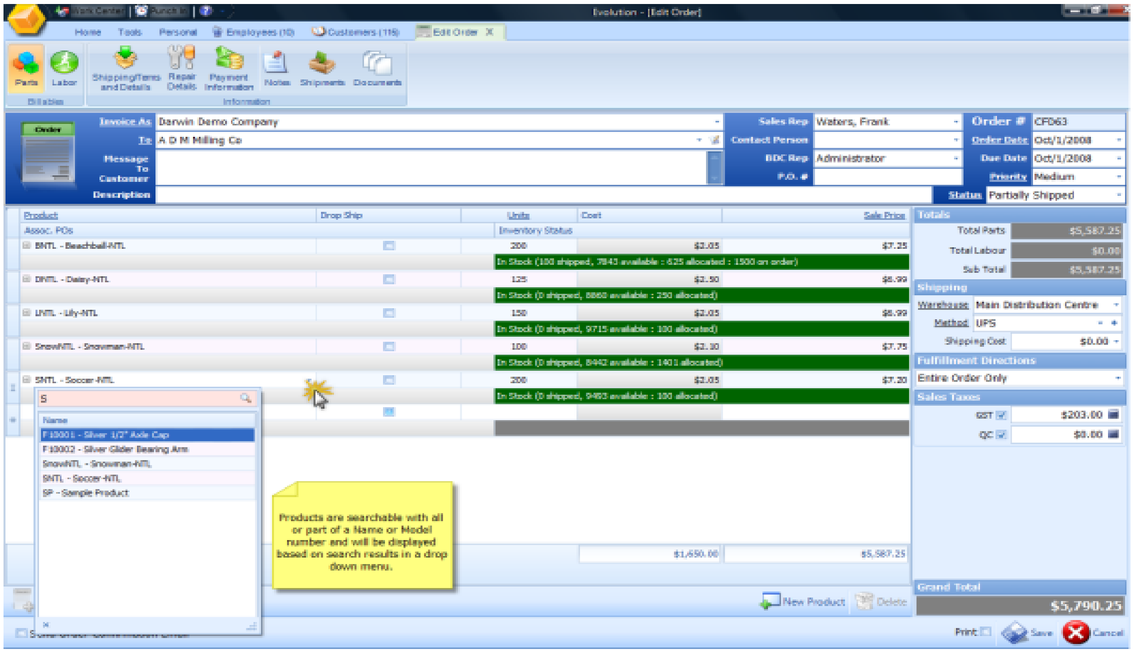
Accounting Views

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.

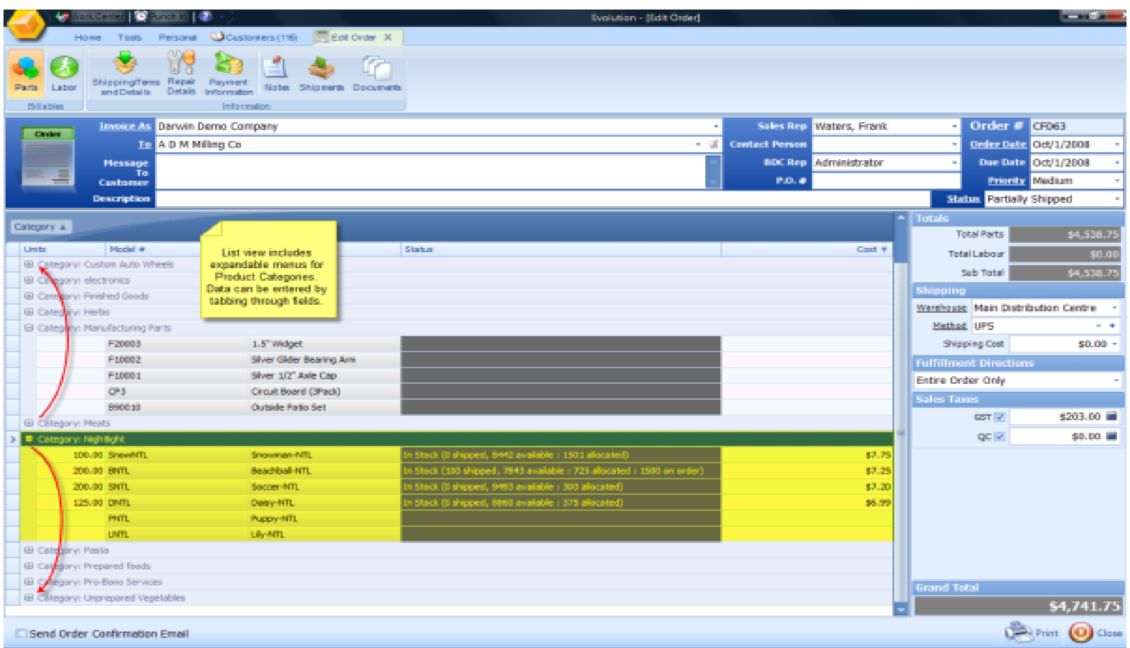


An Example of the Line by Line view is below. This view is ideal when there are more than a few dozen products within Tradepoint.

Line by Line View ex.

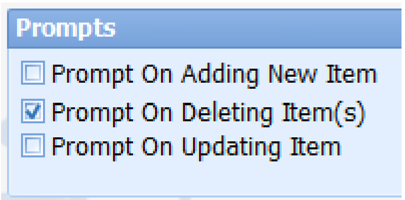


List View example.



Action Prompts

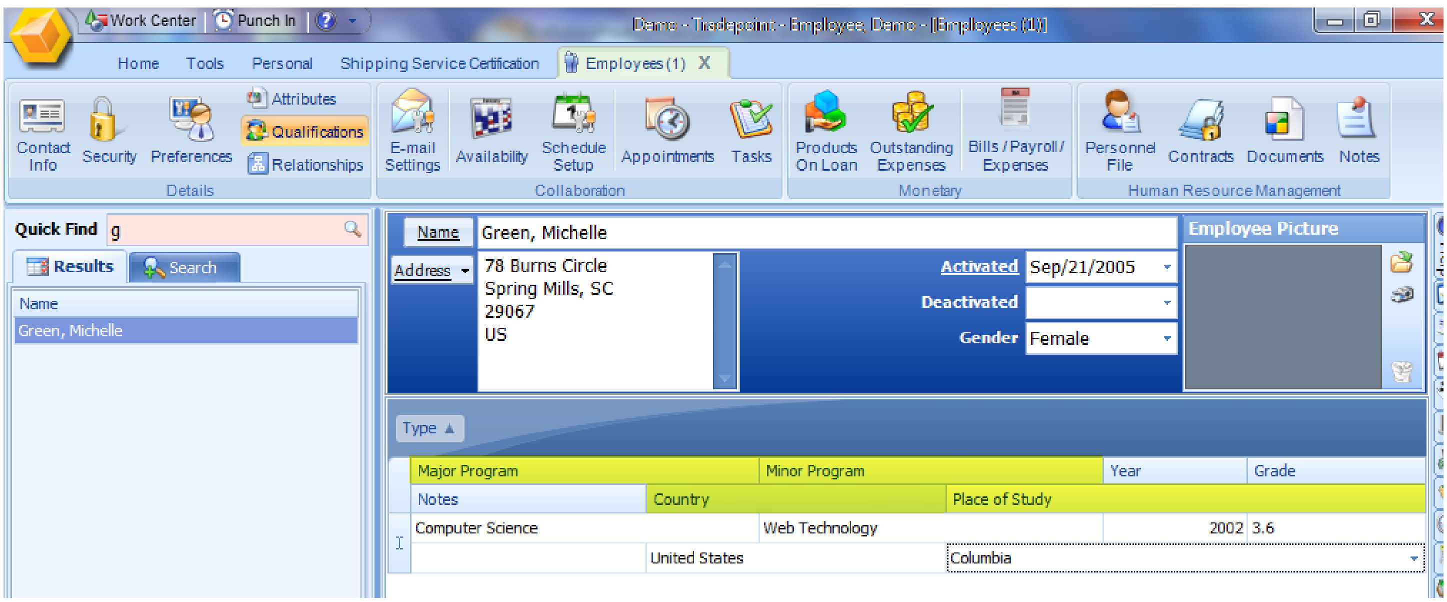
Action prompts can be set which will prompt you every time an action has been precipitated in Tradepoint. The default prompt in Tradepoint is for deleting items which will prompt you that an items is about to be deleted and will allow you to stop before it is deleted.



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

Qualifications

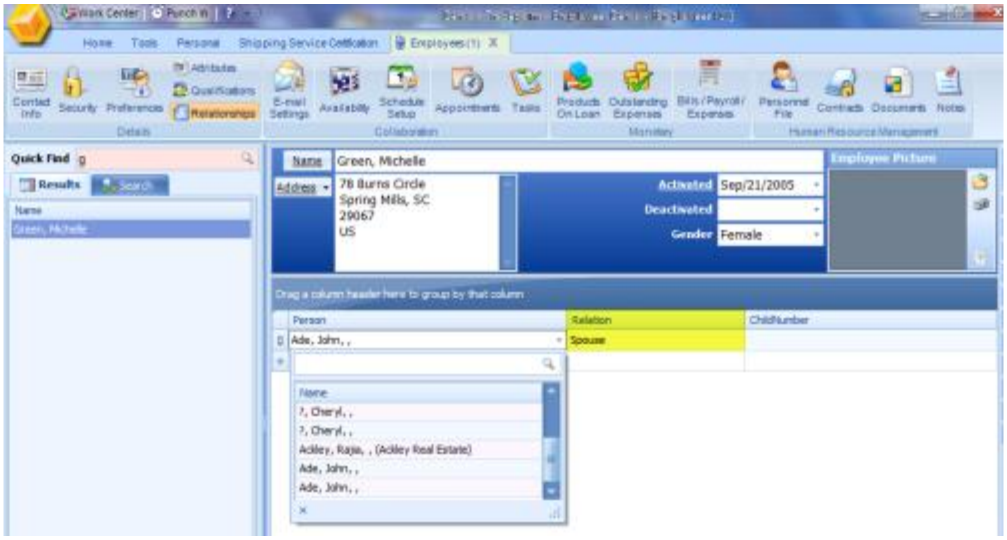
For Employee profiles Qualifications is intended to hold detailed information about each Employee and their qualifications. The fields highlighted in the example below have drop down menus built in which will have to be setup in the Setup & Configure Tool ahead of time.



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.

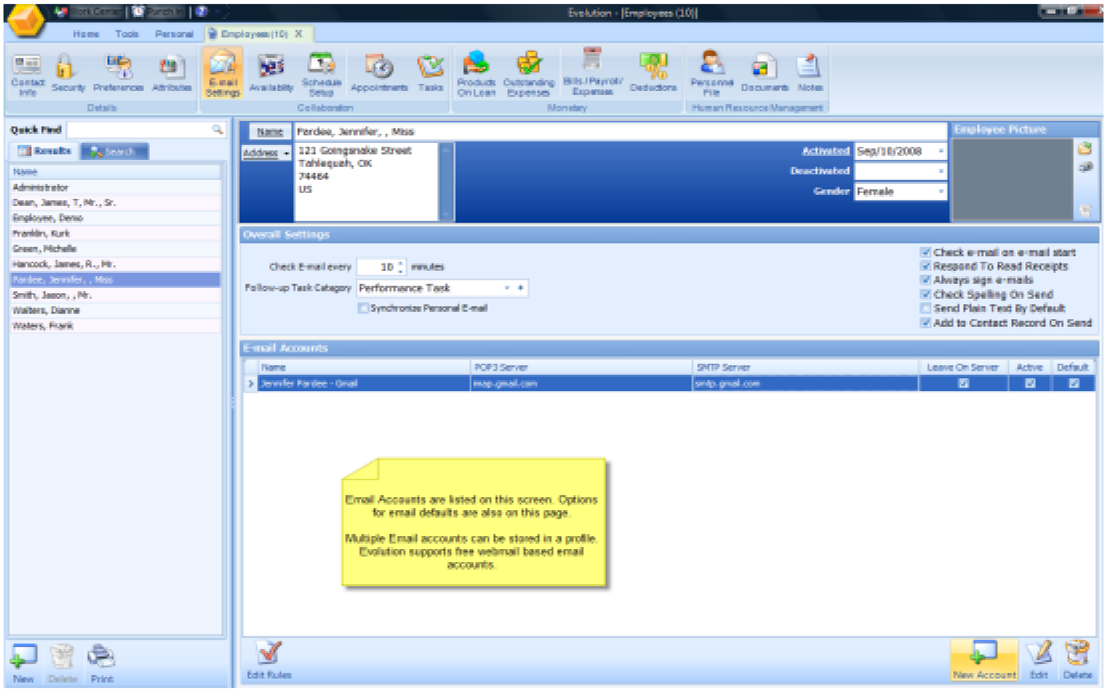
Icons for ***Creating a New Email Account*** or ***Editing an Existing Email Account*** are found in the lower right corner. The create a new account icon will redirect you to a screen to establish a New Email Account and changing an existing email account can be done by double clicking on a listed email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

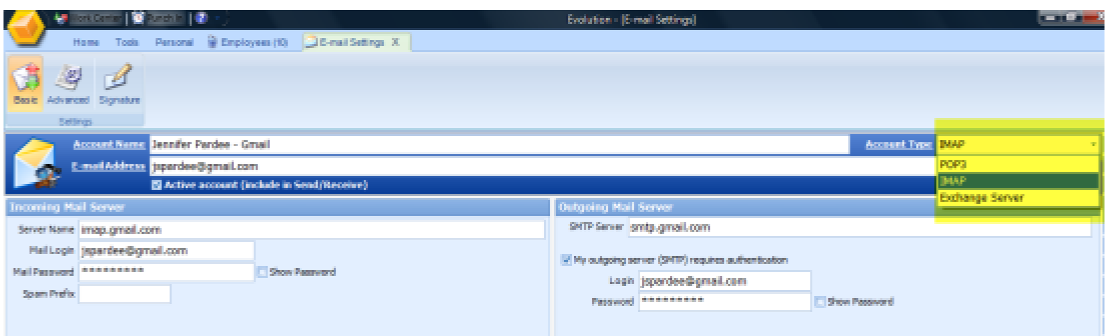
POP3, IMAP, Exchange Server Support

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.

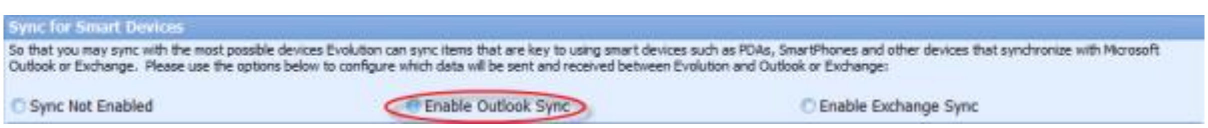
Synchronizing with Outlook

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.

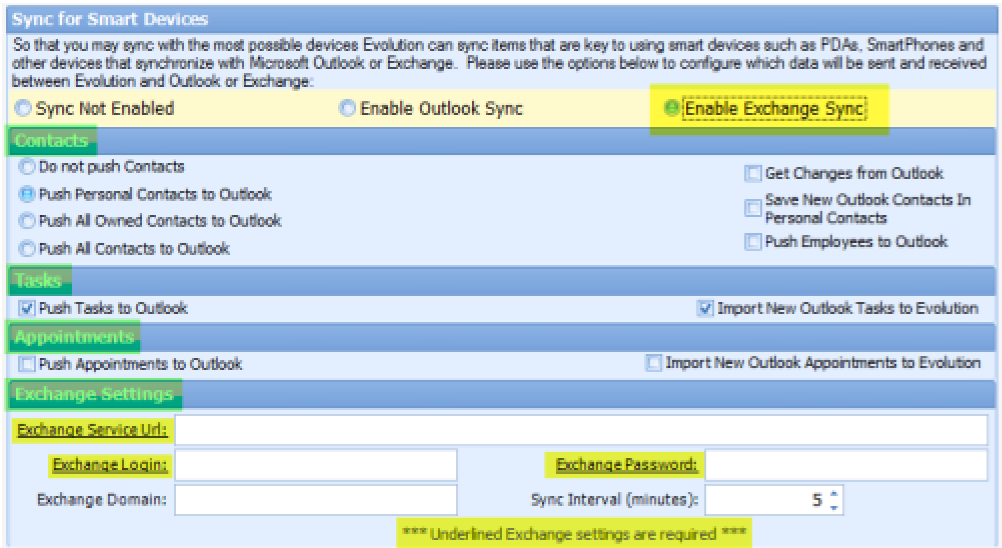


For companies who use Exchange Server the last option for Enabling Exchange Server Synch is what would be checked off to enable Exchange Synch for Blackberries and Smart Phones.

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.

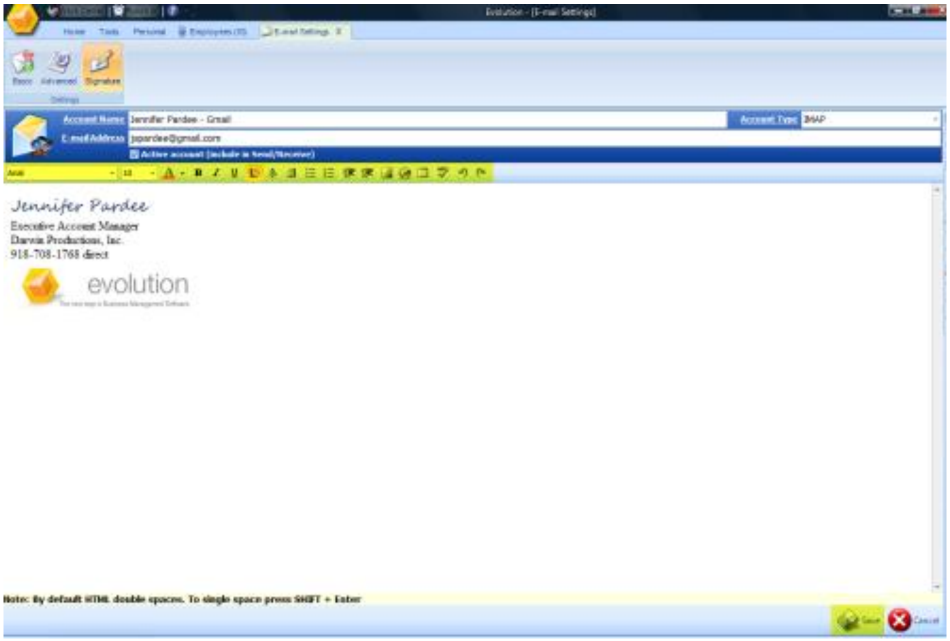


Outlook does not have to be setup with Email Settings for Exchange to be pushed to a SmartPhone, Blackberry or iPhone. Outlook can also be set up in addition to Tradepoint to have email on another computer that does not have Tradepoint.

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.

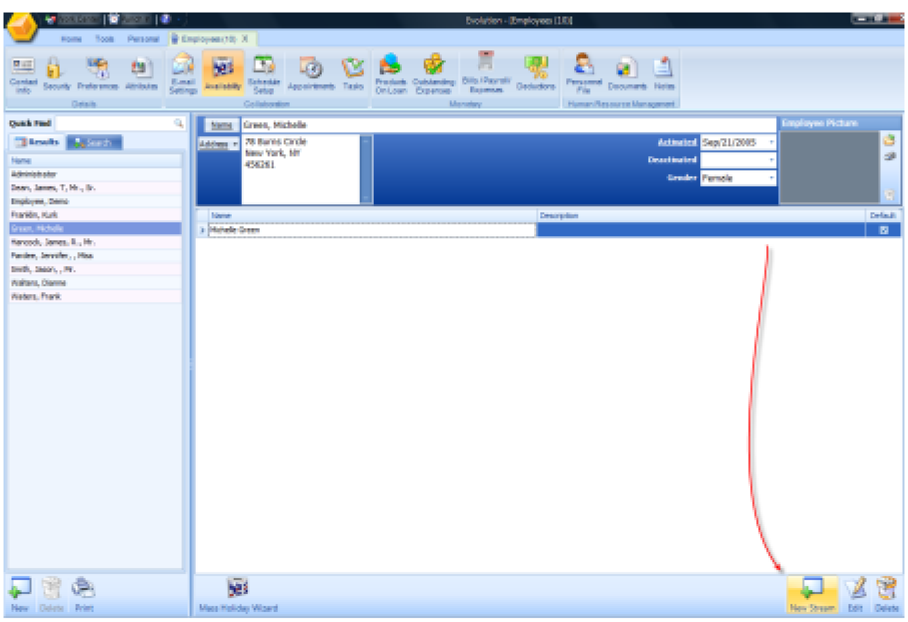


Schedule Availability

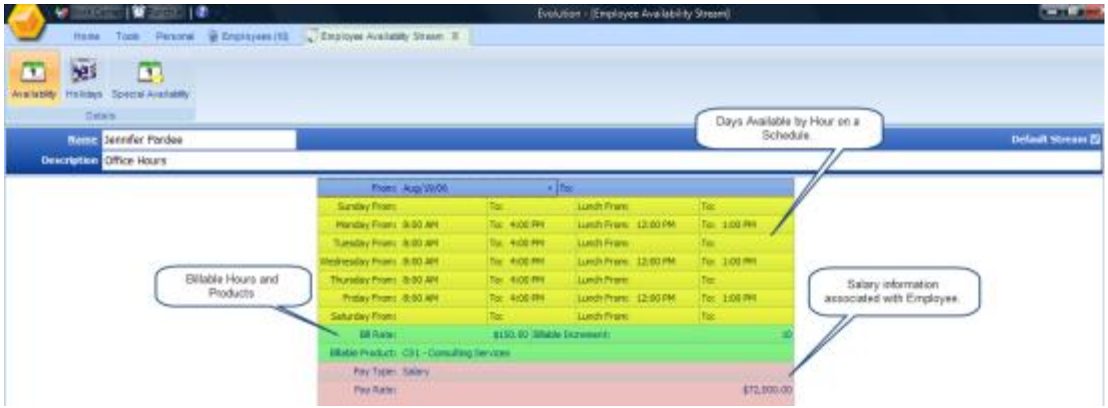
Under the availability icon within Employees is where an Employee profile is where the Schedule setup and preferences are established.

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.

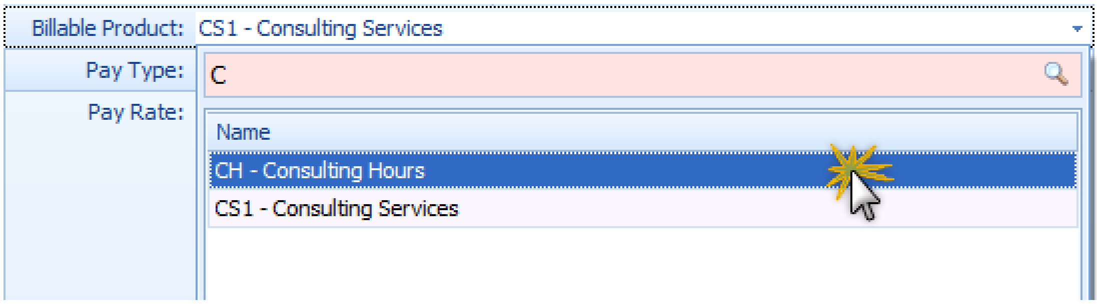
Entering in hours on Monday and clicking the Enter key will automatically enter in the same time through Friday.

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.

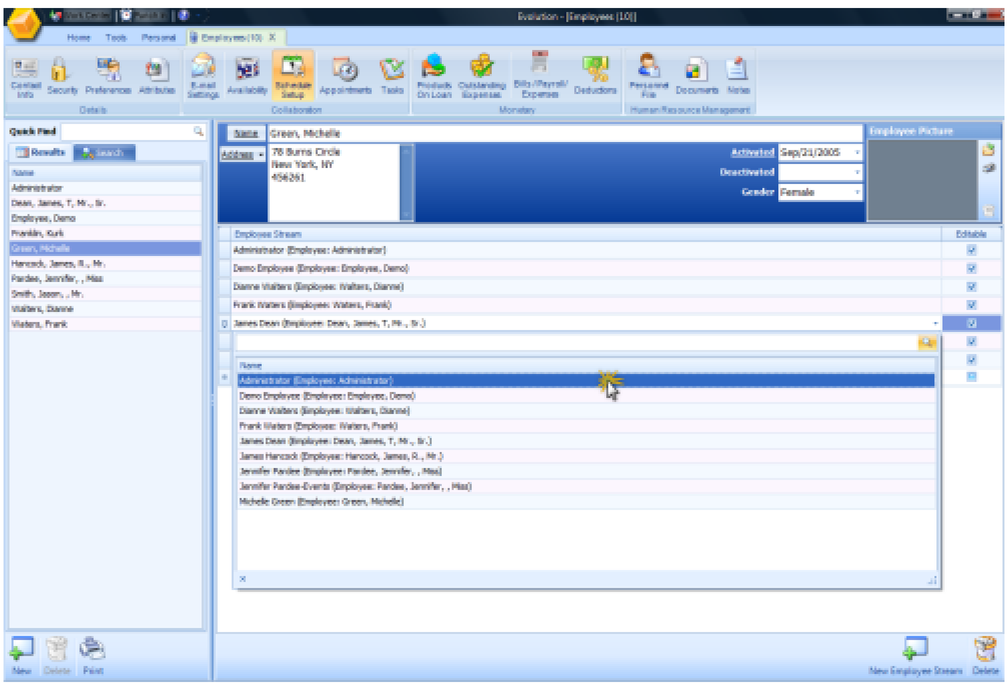
This is a searchable field that will draw on information within the products section of Tradepoint. Products supports any item your company charges money for therefore services and non-inventoried items are supported as well as inventoried items.



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.

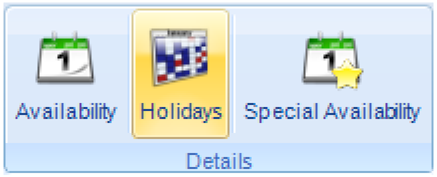
Log out of Tradepoint and log back in to have the changes become visible in the main schedule in Tradepoint.

Holidays & Time Off

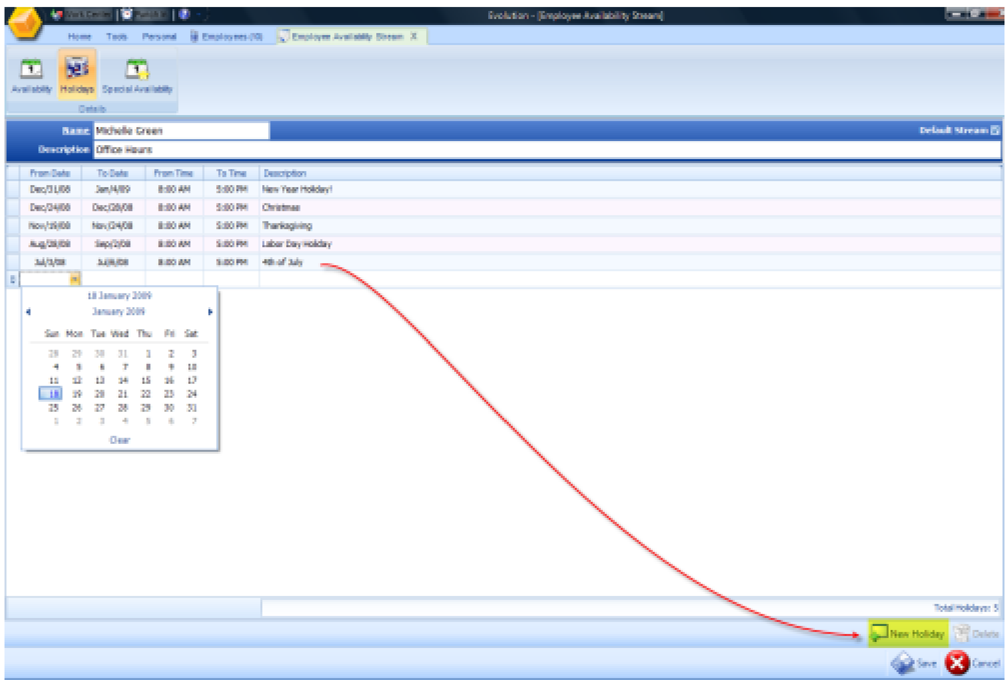
Scheduled Holidays and scheduled time off can be applied to a single Employee or to groups within your organization.

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.

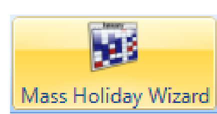


Dates and times can be entered as well as a Description which will show up in the main schedule. After all holidays have been created save your changes.

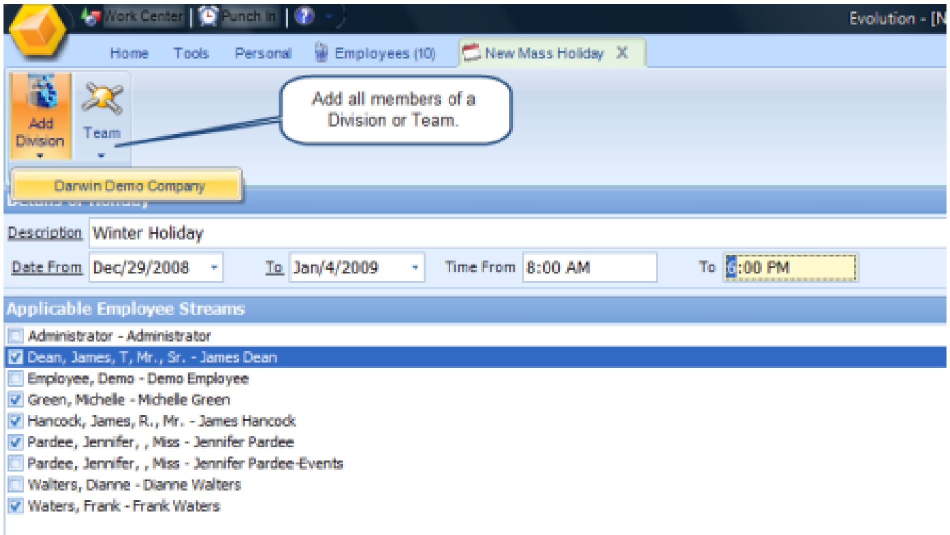
Mass Holiday Wizard

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.

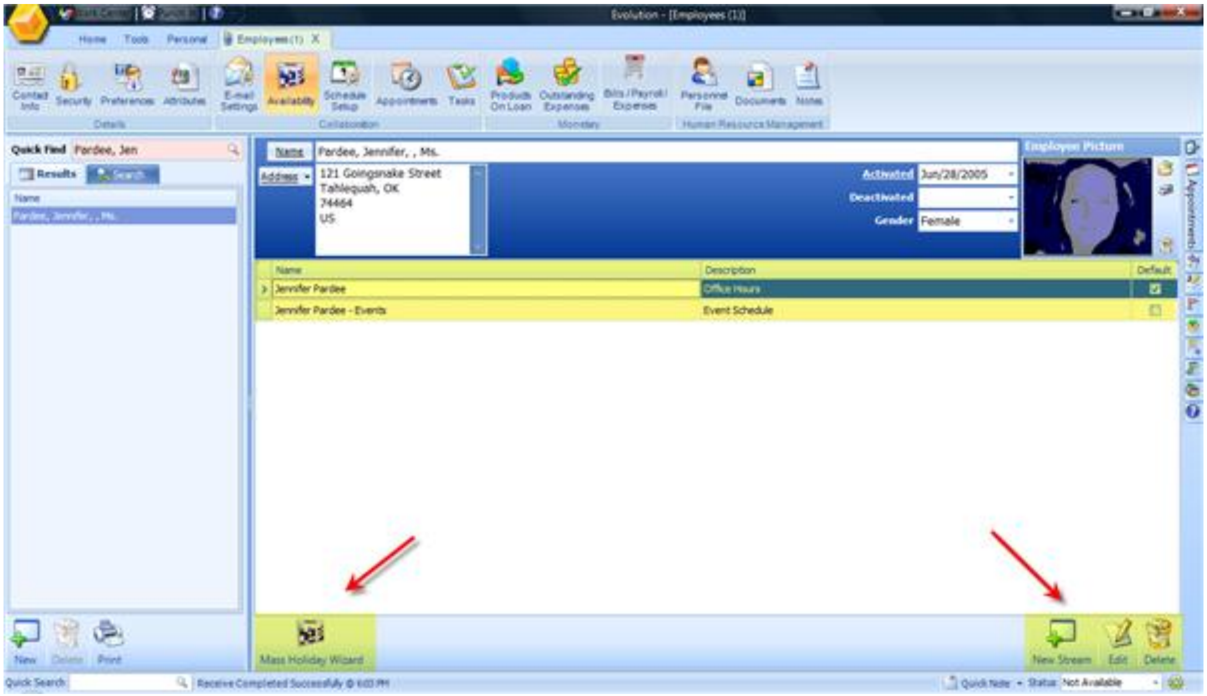
Schedule

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

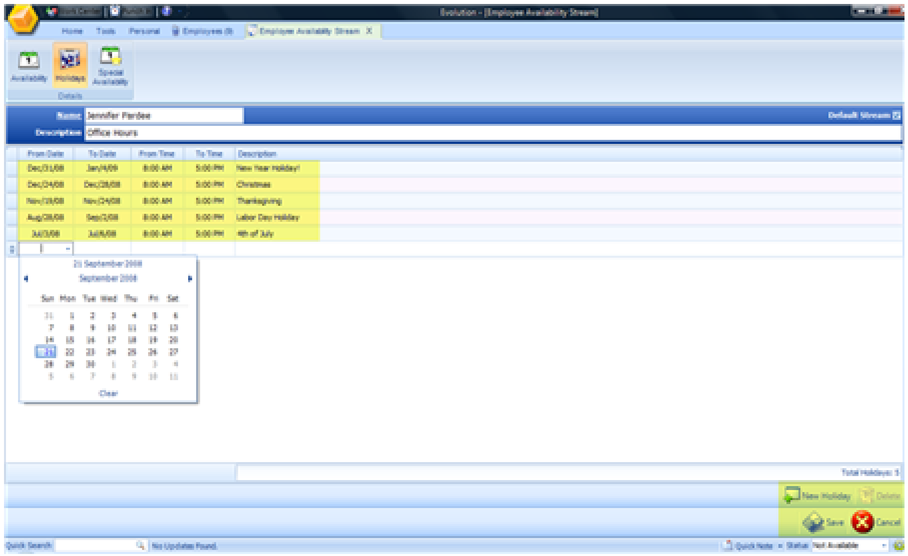
Sharing a Schedule with other Employees is done by setting other people's Schedule to your Schedule under the Schedule Setup icon.

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

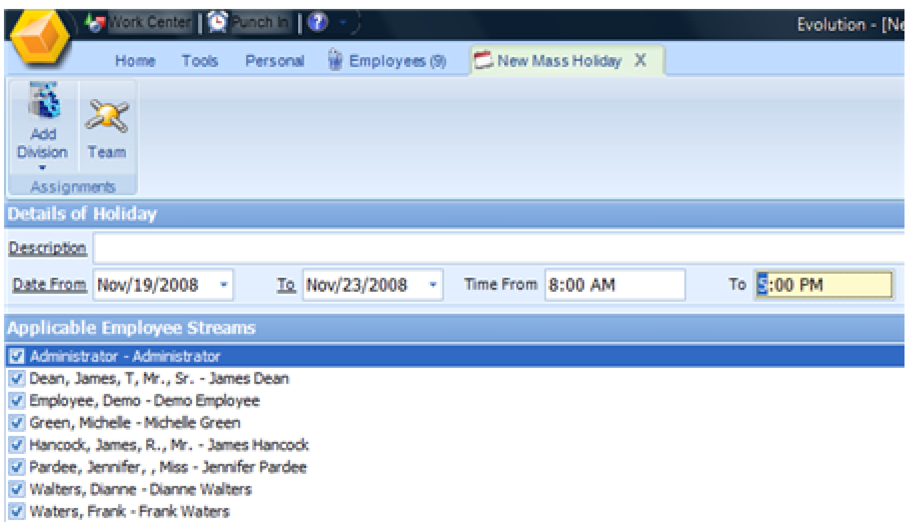
From your Employee profile within the Availability screen click on the Holidays icon to be able to enter in your Holidays.



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.

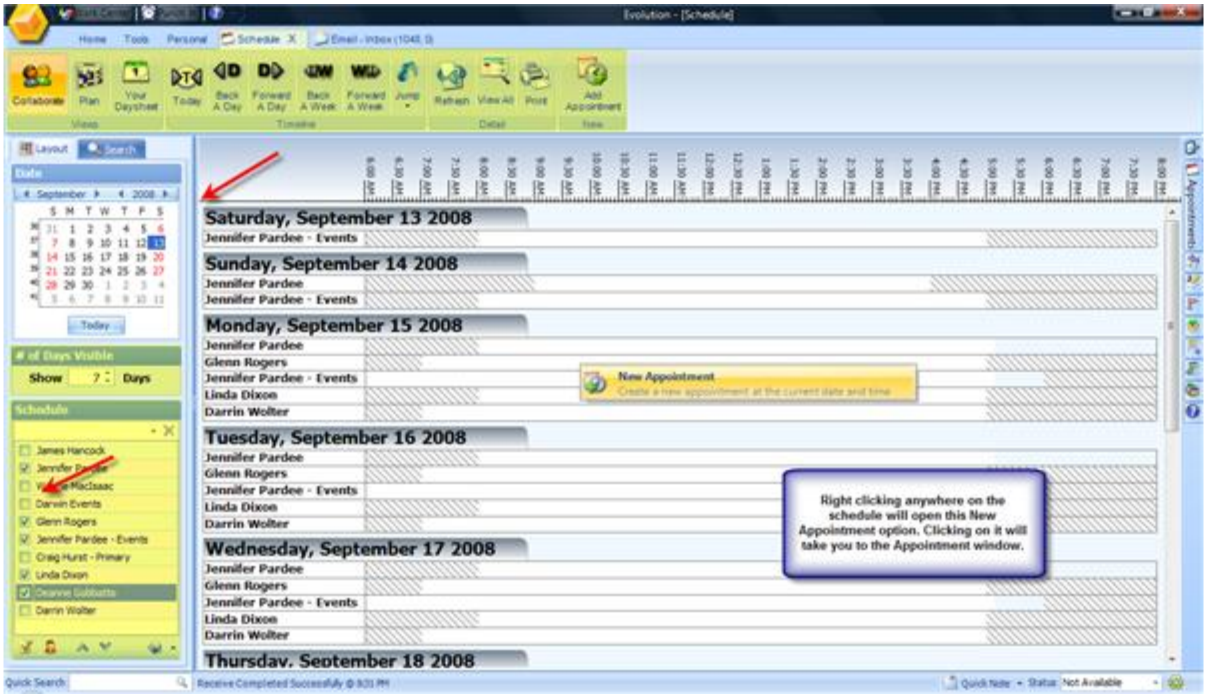


This tool also allows you to set Holidays for different Teams and Divisions. (if applicable)

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.

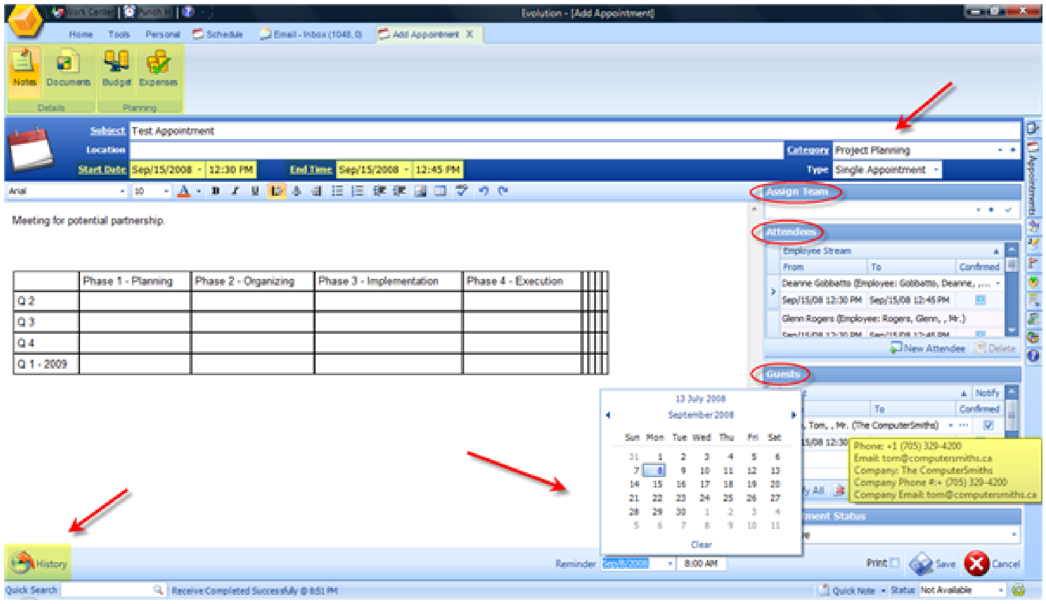


Tools available to you within this view include:

- 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:

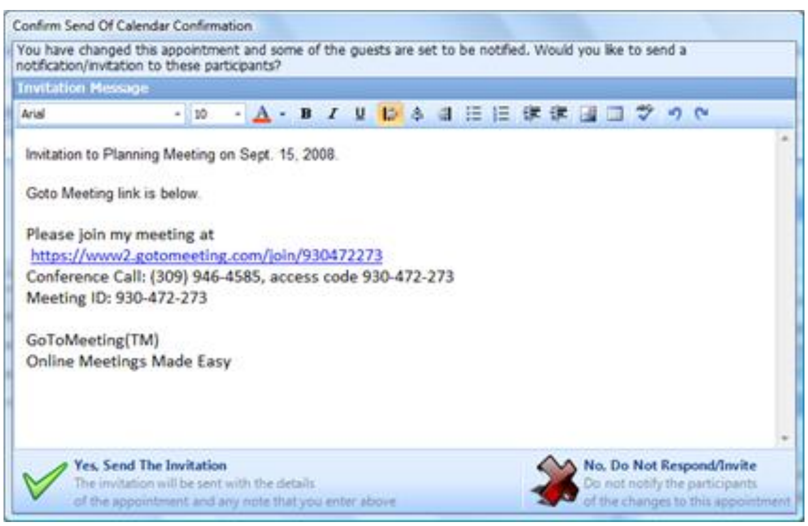
- Specify the dates and times of the Appointment
- Add Employees or Guests to the Appointment
- Select a Category for the type of Appointment (Categories correspond to the colors of the Appointments that show up in the main Schedule)
- Add Documents(that will be visible to Employees that have been added 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.

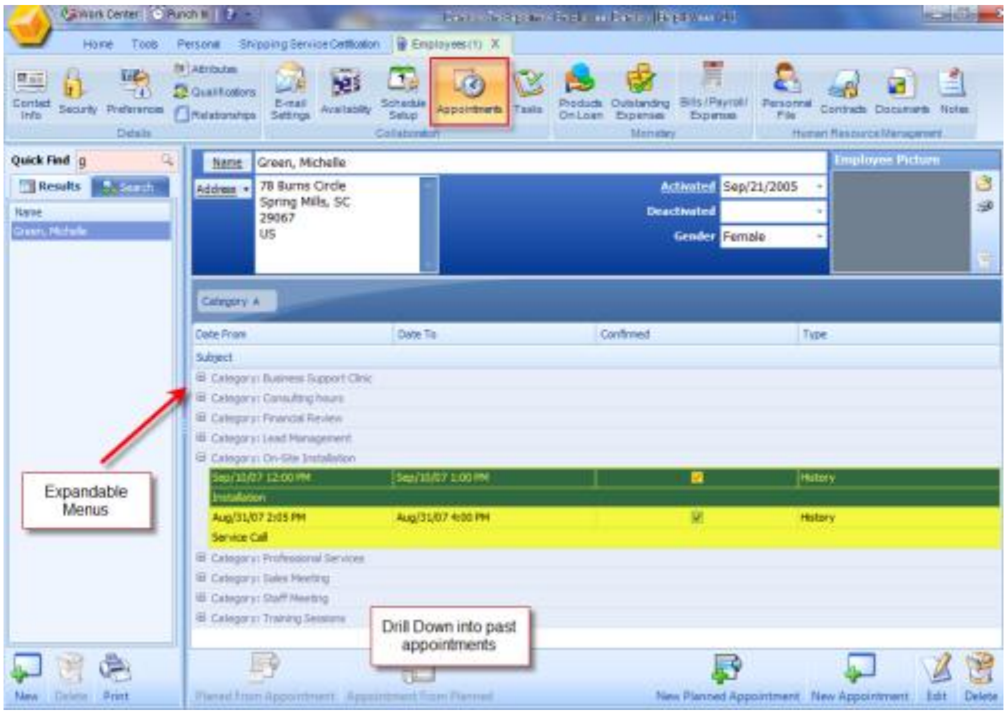
The email invitation will include any details about the Appointment you have entered in here as well as anything else you type into the invitation. *So, in this case the recipient will receive the Notes including the table you see above plus the information in the invitation window below.*



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.

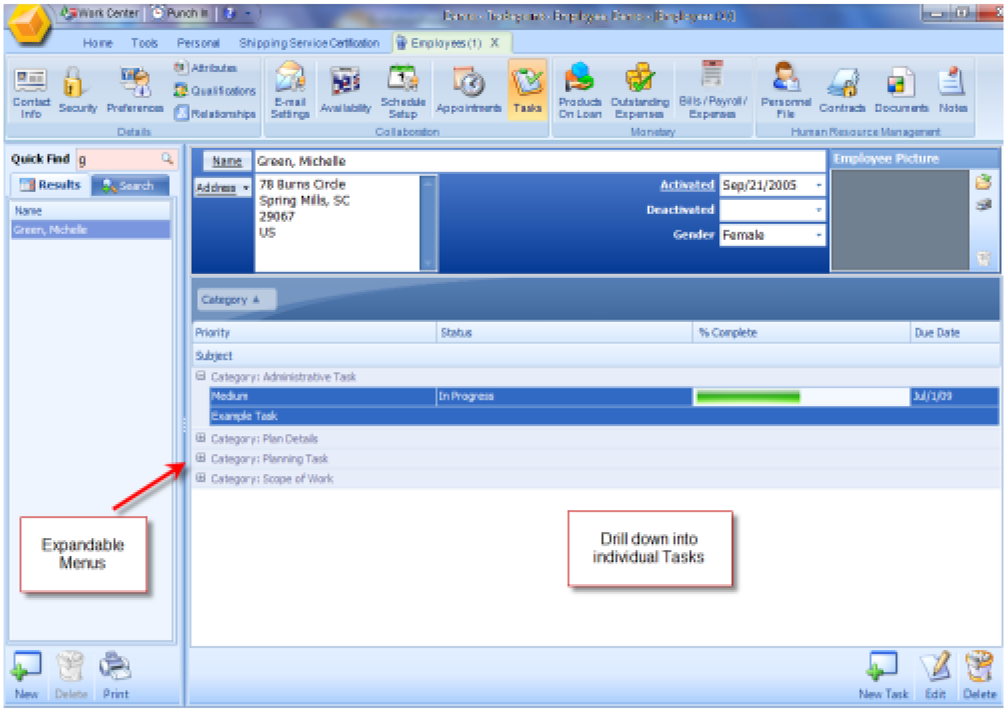
Appointments & Tasks: Employee History

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.

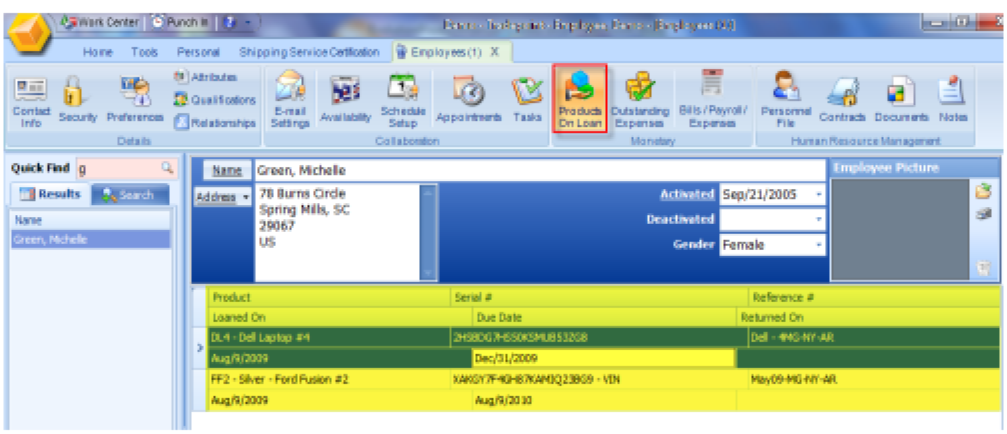
Tasks will be added to this screen automatically as they are created.

Products on Loan: Managing Assets provided to Employees

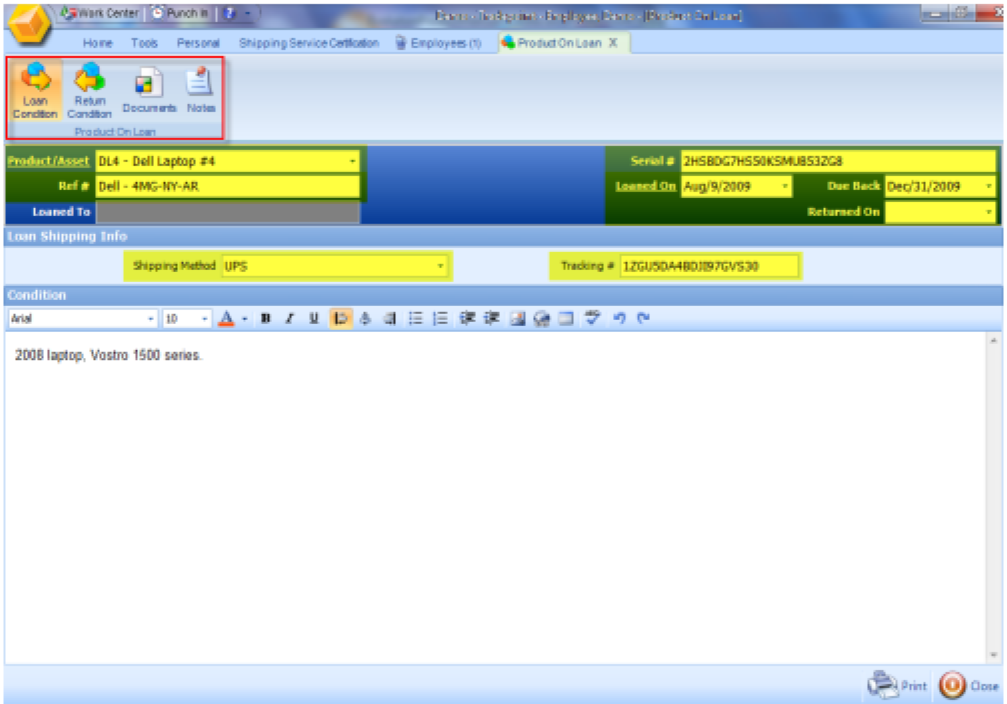
Products on Loan is a tool designed to keep track of the resources that have been given to Employees as part of their job. A typical application of this includes providing laptops, cell phones, and/or company vehicles for an outside sales force.

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.

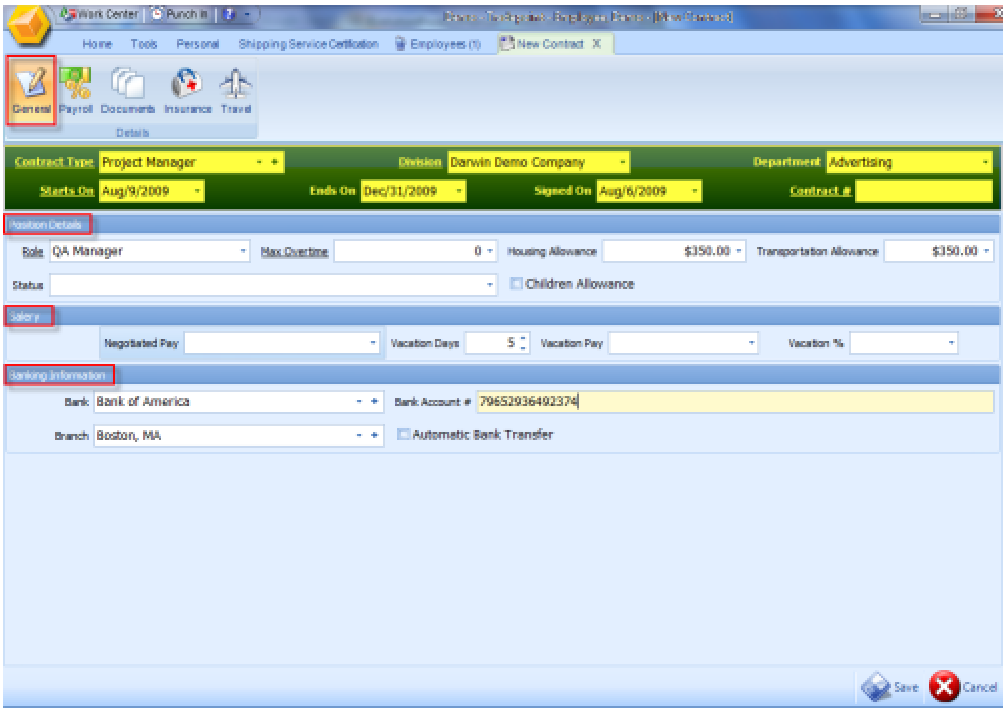
Condition – The condition of an item when it is lent out to an Employee is entered here. In the case above the condition is just the year and model of laptop. This can be as detailed or as simple as necessary per item. For example, for vehicles and existing damage, dents or scratches can be documented 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)

<u>Position Details</u>

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

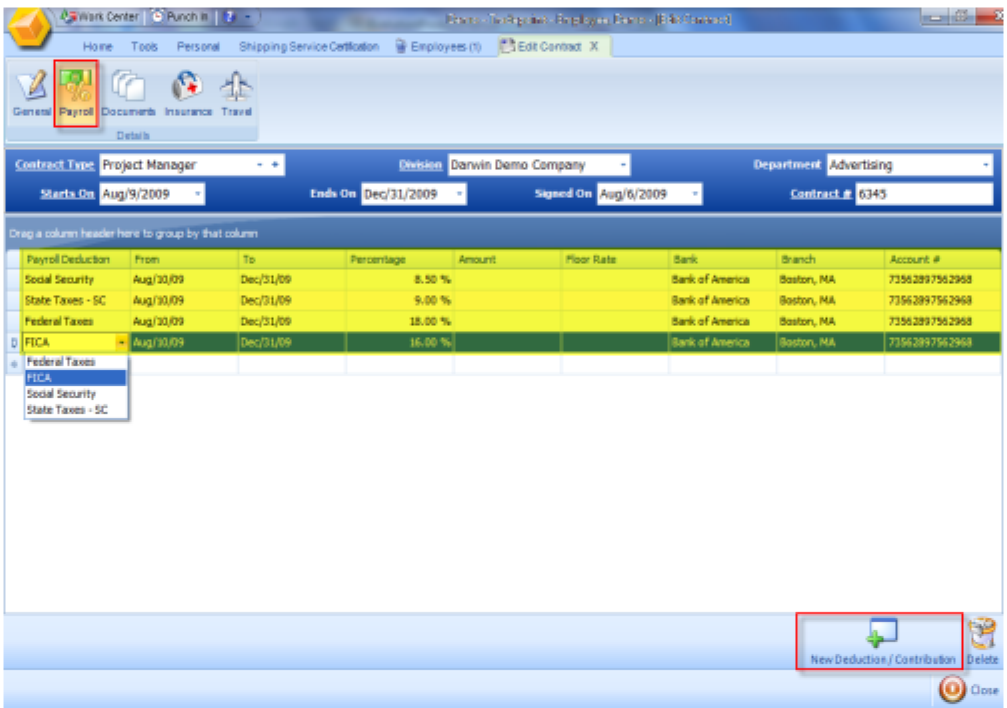
Bank – A drop down menu customizable through the Setup & Configure field.

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.

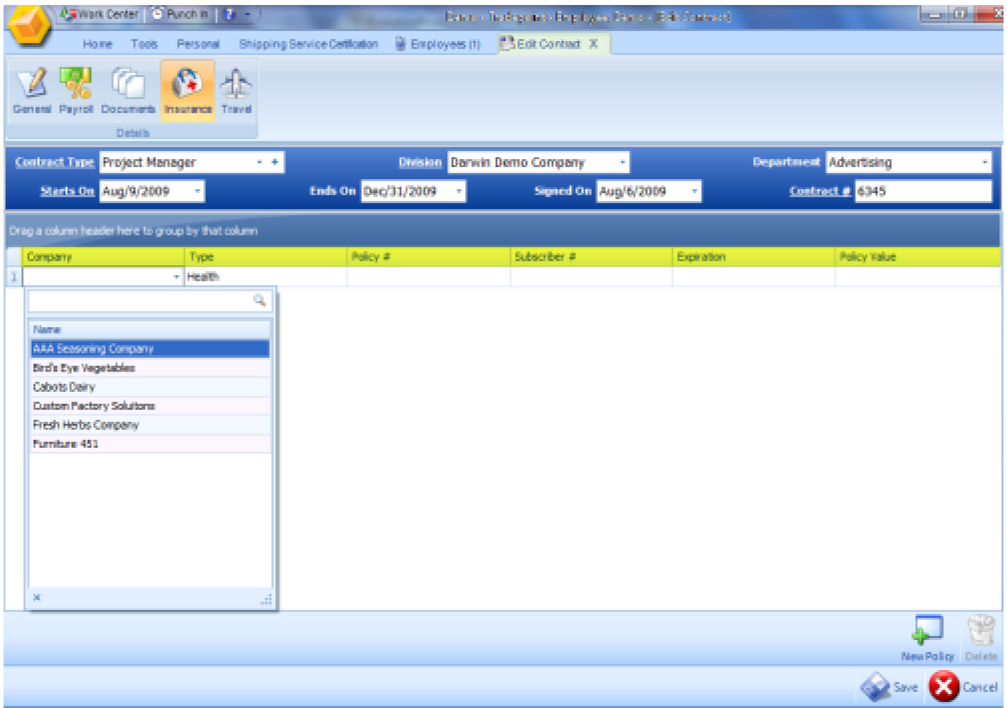
The Bank and branch fields draw information that has been setup in the Setup & Configure tool for Banks and related branch information.

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.

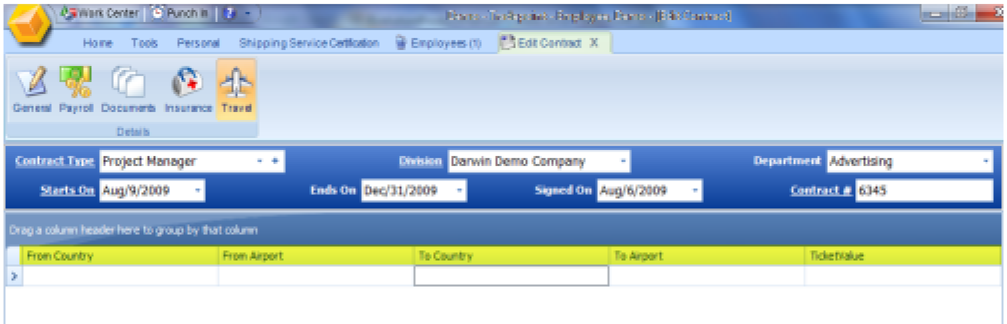
Subscriber # – An open field referring to any relevant Subscriber numbers related to any policies for a contract Employee.

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



Home Tab

Sources

If your company owns lists like "The Harris Directory" "The Scott's Directory" or any other industry specific directory that would offer thousands or hundreds of thousands of entries, you can directly import them into Tradepoint, in the sources.

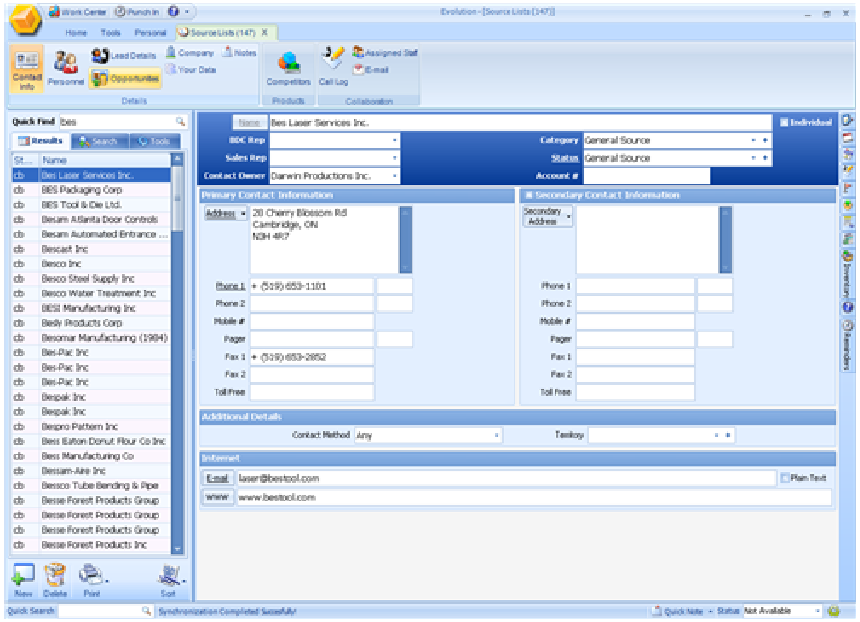
Within Tradepoint your basic screen layout is going to be what you see below. This window theme is the most used theme template in Tradepoint. If you learn how to use this window effectively, you have already learned over 90% of the software's design (feel free to open customer, dealers and warehouse windows to prove the point).

However, Throughout Tradepoint the functionality that is accessible within a particular section will be different in the tool bar at the top of the screen. The tool bar shows what collaborative functionality is available for a particular section within any given section of Tradepoint.

For example in our International Holdings Database, you can easily print out every company whose name starts with the letter "A" that resides in the state of Pennsylvania. Cold calls, mass mailings and more can be done from this list, this feature makes lead generation possibilities almost endless.

Most companies that use such databases use the manufacturer's GUI to manage their leads or, export the source items into an Access file to be queried by administrators.

This Access file or manufacture's GUI solution causes major headaches because both systems do not communicate directly with the lead management side of the business. Double entry or other middle ware headaches become an issue. Also, creating lists in Tradepoint requires no knowledge of working a database. Many company admins are forced to learn direct database commands like: SELECT Northeast.* FROM Northeast WHERE (((Northeast.State)="PA") AND ((Northeast.[employee count])>"20")); in order to create a simple list. Tradepoint simplifies the process by having users fill in simple fields, and Tradepoint takes care of the rest.

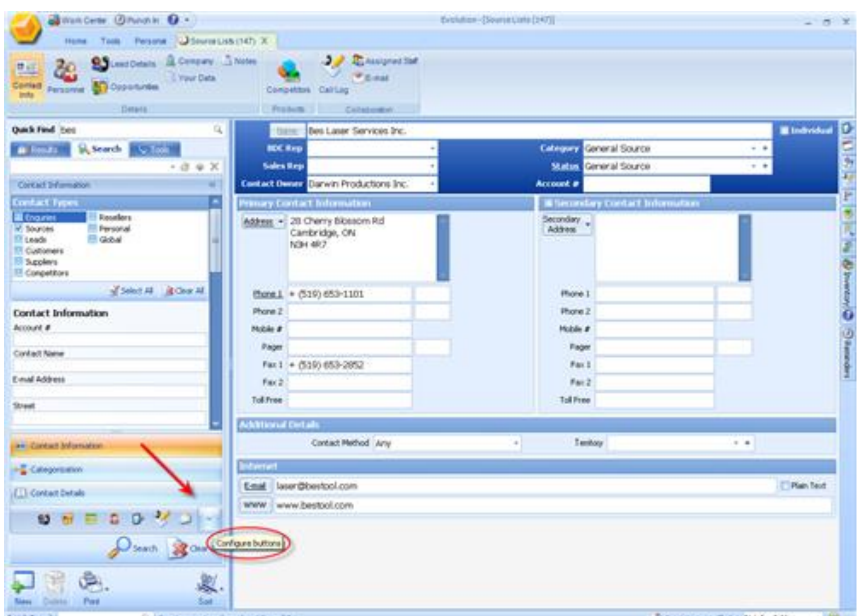


This layout now allows you to query (through Tradepoint) your source list and handle entries like any internal account. Keep notes, move to clients leads or customers, store documents, keep track of multiple statuses etc.

The tool bar at the top of the screen shows the collaborative functionality available within Sources. The 'Quick Find' field provide an Advanced Search Tool allowing you to pull up all organizations starting with the letters 'Bes'(as shown here). Within the Search section directly below the quick find tool lists can be filtered by SIC code, NAICS codes, geo / metro codes, staffing levels, annual revenue levels, county, status, phone numbers and more.

Below illustrates the advanced search tool and sort features available in Tradepoint. The window divider is movable allowing you to see as many of the search icons as you wish at the bottom of the screen.

You also have the option of showing or hiding specific search icons in the Advanced Search Tool by pulling up the window as shown below.



It is important to note that when going into a new window you do not have to close out the current window you are using. Simply click on the 'Home' icon and you can then access all other sections of Tradepoint while keeping the sections you are working in open. The tabs at the top of the tool bar will show which screens you still have open.

Out of the box, Tradepoint's interface has three main tabs; ***Home***, ***Tools*** and ***Personal***. These next sections will explain the functionality available within each tab.

Sources: Tools for Marketing Efforts

The tool bar in sources shows all of the specific tools available for each contact in Sources. Each icon in the tool bar will be illustrated in the Usage Manual. Since many of the functions are available in each CRM section of Tradepoint each function will be illustrated once and you can navigate to previous CRM sections to review specific functionality for each section in Tradepoint CRM.

The functions that will be reviewed within Sources are:

- Contact Info
- Personnel
- Lead Details
- Opportunities
- Company
- Your Data
- Notes
- Competitors
- Call Logs
- Assigned Staff
- Email

Additional tools are also available within each section of Tradepoint CRM will also be illustrated once even though the functions are available throughout Tradepoint. They include:

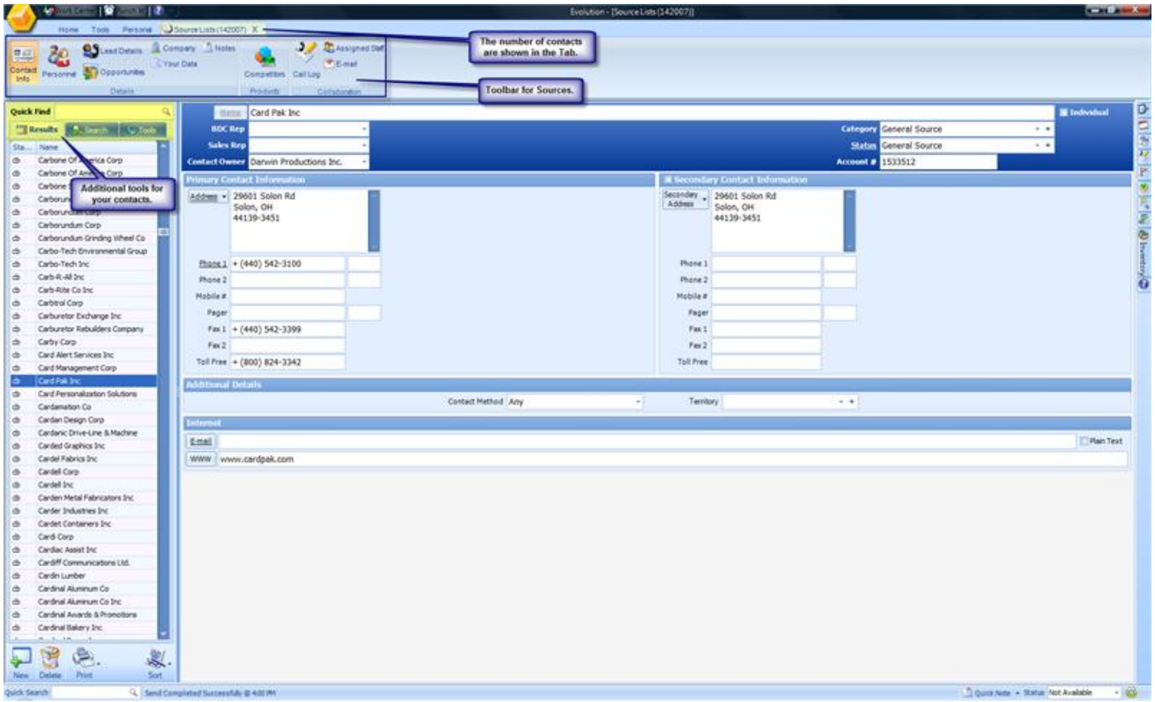
- Advanced Search Tool
- Mail Merge Tool
- Mass Email Tool
- Move and Copy Tool

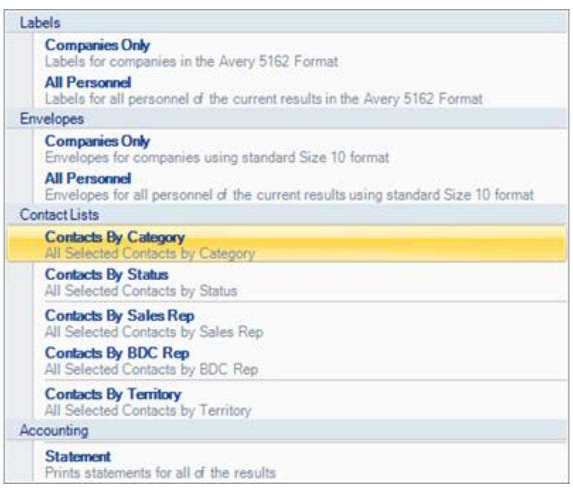
This part of the manual will walk you through the additional tools listed directly above plus the functions available within Sources.

Sources is the first option within the CRM tools in Tradepoint. Sources is designed for a company to be able to source any outbound sales and marketing efforts from a list of contacts. The screen is designed to view each contact at a time or to scroll through a list on the left.

Searches can be performed based on various criteria (such as location, zip code, type of industry, etc.). Search results can then be allocated or assigned to other CRM tools such as Leads and Customers.

Tools found on each CRM page are highlighted in the image below of Sources. These tools will be available within each section of Tradepoint's CRM. The images below show the tools you will find within each section of Tradepoint's CRM.



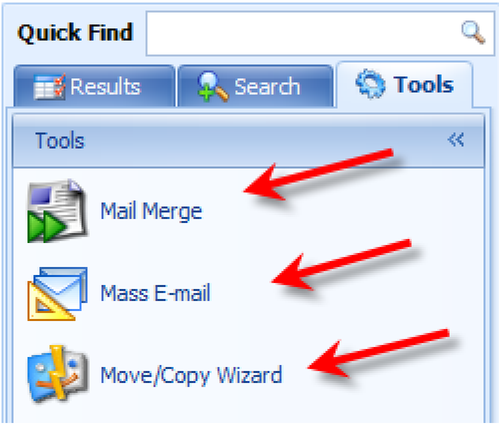


The Print icon 

found on the lower left corner of each section of the CRM includes the menu you see to your left allowing you to generate Quick Reports at a moment's notice. This is ideal for sales efforts and for printing out quick lists for labels and letters for mailings.

The Sort icon 

has the menu of options you see to your left. This allows you to sort your search results by different types of information at a moment's notice. Your results in a given screen (Sources, Leads, Customers, etc.) will be resorted based on the preference you choose in the pop up.



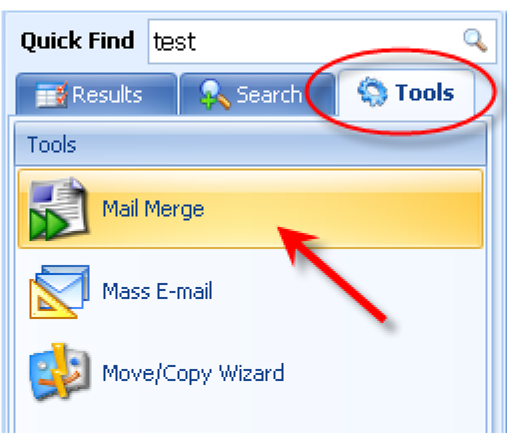
The Tools tab within the Advanced Search bar on the left side of your screen has three tools for Mail Merge, Mass Email Tool and a Move and Copy tool to move and/or copy contact to different areas within Tradepoint. These tools will be found within each CRM section of Tradepoint.

Mail Merge Tool

Tradepoint has a built in mail merge tool allows you to perform mail merges against Microsoft Word 2003 or later. To do so requires that you setup your document template within Word 2003 or 2007 which will then be referenced within the Mail Merge Tool in Tradepoint.

To simplify the process Tradepoint does not use the Word Mail Merge process so that you do not need to know anything about databases etc. This tutorial walks you through generating the template using the merge fields available in Tradepoint.

Since you will have to perform a search to generate a list of people to send your document to the Mail Merge tool is located within the Advanced Search Tool on the left hand side of the Tradepoint Interface.



The Mail Merge tool will open a wizard that will interact with the version of Microsoft Office you have on your computer.

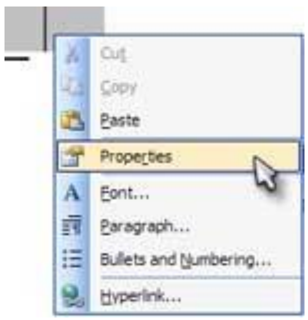
Mail Merge Part 1 - Create a Mail Merge Document Template from Word 2003

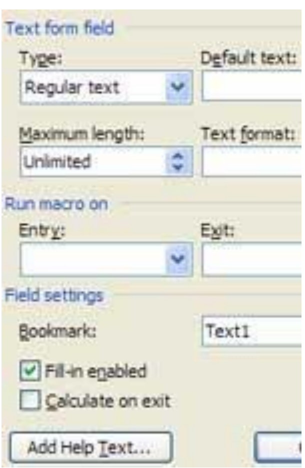
Tradepoint uses the Form Fields functionality of Microsoft Word to provide Mail Merge Functionality. Each of the tags below can be put into your Word document as Text Labels using the Form Fields tool bar.

You can show the Forms tool bar by going to the View menu and choose the tool bars menu and clicking on "Forms" The items with check boxes beside them are currently visible.

To use a tag simply add a new Text Field (ab|) to your document. Once you have the text field you will see a gray area. Simply right click on it and choose Properties. (To the right)

Once you are in the properties window you need to fill in the default text section.





Simply enter the tag name into the Default Text field. Capitalization does not matter, simply make sure that you don't have any spaces. Once you have done so, click OK. You can now format the field however you wish, put it in styles or whatever else you wish to do. When you create a new document based on the template the information will automatically be filled in for you.

Mail Merge Part 1 - Create a Mail Merge Document Template from Word 2007

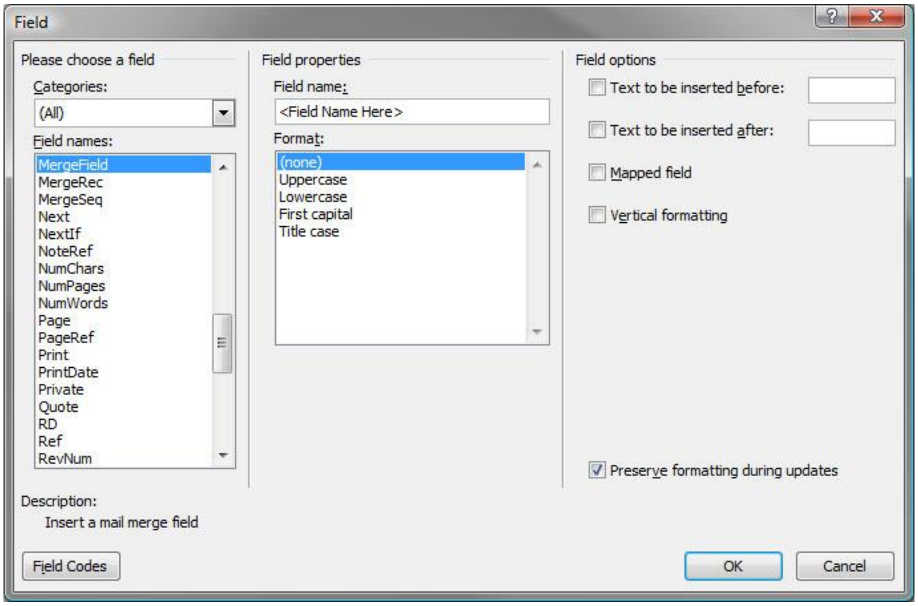
Using the Mail Merge tool in Tradepoint is a 2 step process. This article focuses on the first step is creating the documents used in Mail Merges with Word 2007.

There is no real limit of the type of Word Documents that can be used in a Mail Merge within Tradepoint. The only two tools necessary to use a Word 2007 document in the Mail Merge Tool in Tradepoint are:

1. Any merge fields have to be set up within a document. Available Merge Field names for CRM information within Tradepoint can be found in this chart below. ***Word 2007 recommends the double brackets << >> to be used with the Mail***

Merge feature within Word. Within Tradepoint the single brackets < > will pick up the respective Mail Merge information options.

With Word 2007 everything has gotten easier and harder all at the same time. To add a merge field click on the Insert tab in Word and then click on "Quick Parts" as shown to the right and then click "Field...".



After clicking "Field..." you will be presented with the following screen:

Note that under Field names we have chosen "MergeField". It is very important that you choose this option as you will not get the option to enter the field name as noted above. After choosing "MergeField" from the Field Names list, type in the field name that you wish to have merged into the Field Properties section.

The list of available mail merge fields are provided below for your convenience.

After clicking OK you will have a merge field added to the document that you are working on. Once you have added all of the fields that you wish to have in the document, save it and you are ready to do your first mail merge. (If you didn't create the Document Template from inside Tradepoint to start with, you will need to go to the Tools tab, then click on "Documents" under the template section and add the template using the import functionality before you can start your mail merge process.)

Available Merge Fields

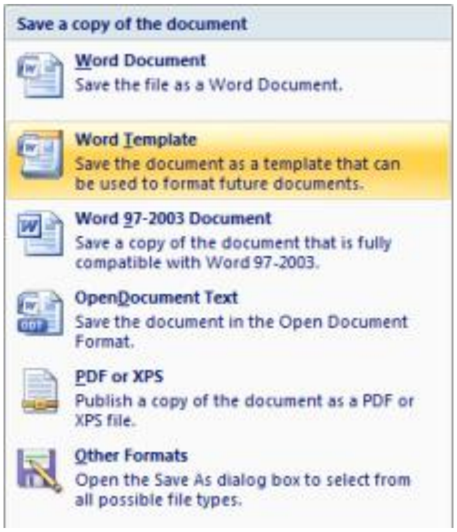
Below is a list of the standard mail merge fields that can be used in a Mail Merge. This is not a complete list of the available fields, those that are most often required when doing a mail merge. If you require a field that is not listed below, check the Knowledge Base section of the Darwin Productions website or contact technical support for assistance.

Tag	Description
<CompanyName> or <Name>	The name of the contact or Company.
<Title> or <Salutation>	The title of the individual contact or staff member of the company.
<Firstname>	The first name of the individual contact or staff member of the company.
<Initial>	The middle initial of the individual contact or staff member of the company.
<Lastname>	The last name of the individual contact or staff member of the company.
<Address>	The Address of the Contact formatted Correctly.
<Street1> or <StreetName1>	The first street in the contact's address.
<Street2> or <StreetName2>	The second street (if any) in the contact's address.

<City>	The City in the contact's address.
<Prov> or <Province> or <State>	The Province or State of the contact's address.
<Postal> or <Zip> or <PostalCode>	The Postal Code/Zip Code of the contact's address.
<Country>	The Country (if it exists) of the contact's address.
<Phone1>	Primary Phone number of the Contact.
<Phone1Ext>	Primary Phone's Extension.
<Phone2>	Secondary Phone number of the Contact.
<Phone2Ext>	Secondary Phone's Extension.
<Fax1>	Primary Fax number of the Contact.
<Fax2>	Secondary Fax number of the Contact.
<Cell>	Mobile Phone number of the Contact.
<Pager>	Pager number of the Contact.
<PagerExt>	Pager's Extension (if any).
<TollFree>	Toll Free Phone number of the Contact.
<SiteURL>	Contact's Web address.
<Email>	Contact's Email address.
<SecondaryAddress>	Secondary Address of the Contact formatted Correctly.
<SecondaryPhone1>	Secondary Phone #.
<SecondaryPhone1Ext>	Secondary Phone Extension.
<SecondaryPhone2>	Secondary Phone 2 #.
<SecondaryPhone2Ext>	Secondary Phone 2 Extension.
<SecondaryFax1>	Secondary Fax.
<SecondaryFax2>	Secondary Fax #2.
<SecondaryCell>	Secondary Mobile Phone #.
<SecondaryPager>	Secondary Pager #.
<SecondaryPagerExt>	Secondary Pager Extension.
<SecondaryTollFree>	Secondary Toll Free #.
<OpenDate>	The Opening Date of the Contact.
<CloseDate>	The Closing Date (if any) of the Contact.
<DateOfEntry>	Date that the Contact was entered into the System.
<Alias>	Other name of the contact or company.
<Birthday>	The Birth Day of the contact if it is an individual.
<Anniversary>	The Anniversary of the contact if it is an individual.
<Manager>	The individual's manager.
<Assistant>	The individual's assistant.
<UserName> or <WebLogin>	The web site login for the personnel.
<Password> or <WebPassword>	The web site password for the personnel.
<Notes>	Any Notes you have on the Contact. (be careful with this one for obvious reasons!)
<ReferralCompanyName>	The name of the referrer.

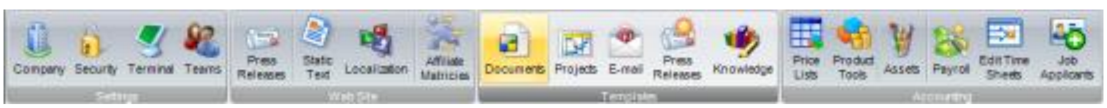
<ReferralStreet1>	Street 1 of the referrer's address.
<ReferralStreet2>	Street 2 of the referrer's address.
<ReferralCity>	The City of the referrer's address.
<ReferralPostal>	The Postal Code/Zip of the referrer's address.
<ReferralCountry>	The Country of the referrer's address.
<ReferralPhone1>	The Primary Phone number of the referrer.
<ReferralPhone1Ext>	The Primary Phone number's Extension of the referrer.
<ReferralPhone2>	The Secondary Phone number of the referrer.
<ReferralPhone2Ext>	Secondary Phone's Extension.
<ReferralFax1>	Primary Fax number of the referrer.
<ReferralFax2>	Secondary Fax number of the referrer.
<ReferralCell>	Mobile Phone number of the referrer.
<ReferralPager>	Pager number of the referrer.
<ReferralPagerExt>	Pager's Extension (if any).
<ReferralTollFree>	Toll Free Phone number of the referrer.
<ReferralSiteURL>	Contact's Web address.
<ReferralEmail>	Contact's Email address.
<ReferralSecondaryAddress>	Secondary Address of the referrer formatted Correctly.
<ReferralSecondaryPhone1>	Secondary Phone #.
<ReferralSecondaryPhone1Ext>	Secondary Phone Extension.
<ReferralSecondaryPhone2>	Secondary Phone 2 #.
<ReferralSecondaryPhone2Ext>	Secondary Phone 2 Extension.
<ReferralSecondaryFax1>	Secondary Fax.
<ReferralSecondaryFax2>	Secondary Fax #2.
<ReferralSecondaryCell>	Secondary Mobile Phone #.
<ReferralSecondaryPager>	Secondary Pager #.
<ReferralSecondaryPagerExt>	Secondary Pager Extension.
<ReferralSecondaryTollFree>	Secondary Toll Free #.

2. The document has to be saved as a Word template. This option is found in the Save As options within Word 2007.

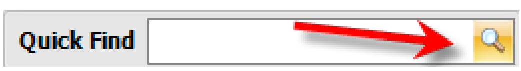


Once a Word 2007 document has been saved with the respective mail merge fields as a Word template (file extension *.dotx*) the Document template can then be set up within Tradepoint.

3. From the Tools Tab click on the Documents icon under Templates. This is where any Document Templates for use in the Mail Merge Tool will be set up.

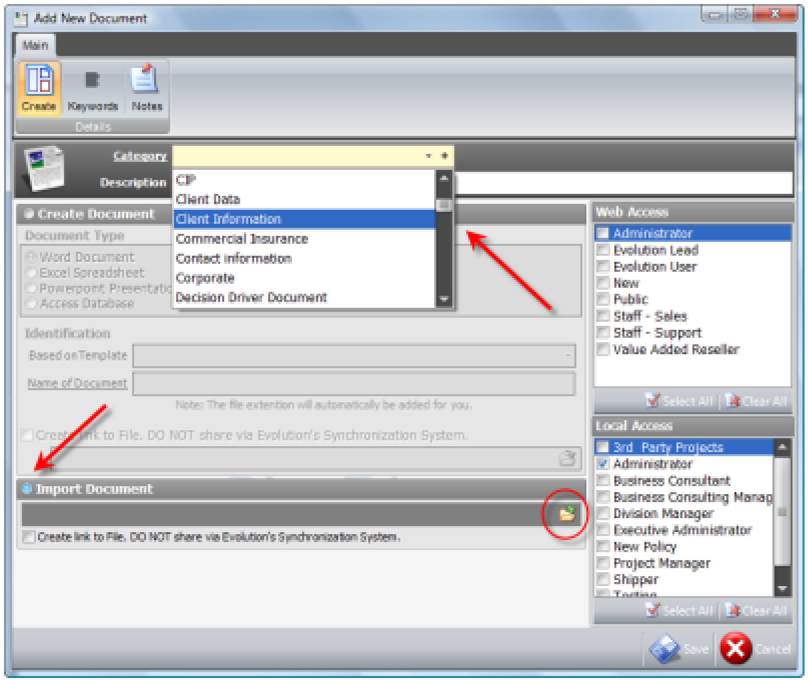


The initial screen shown will look blank. If there are no document templates then click the 'New' icon in the lower left corner. If there are document templates already set up then click the search icon to show them.

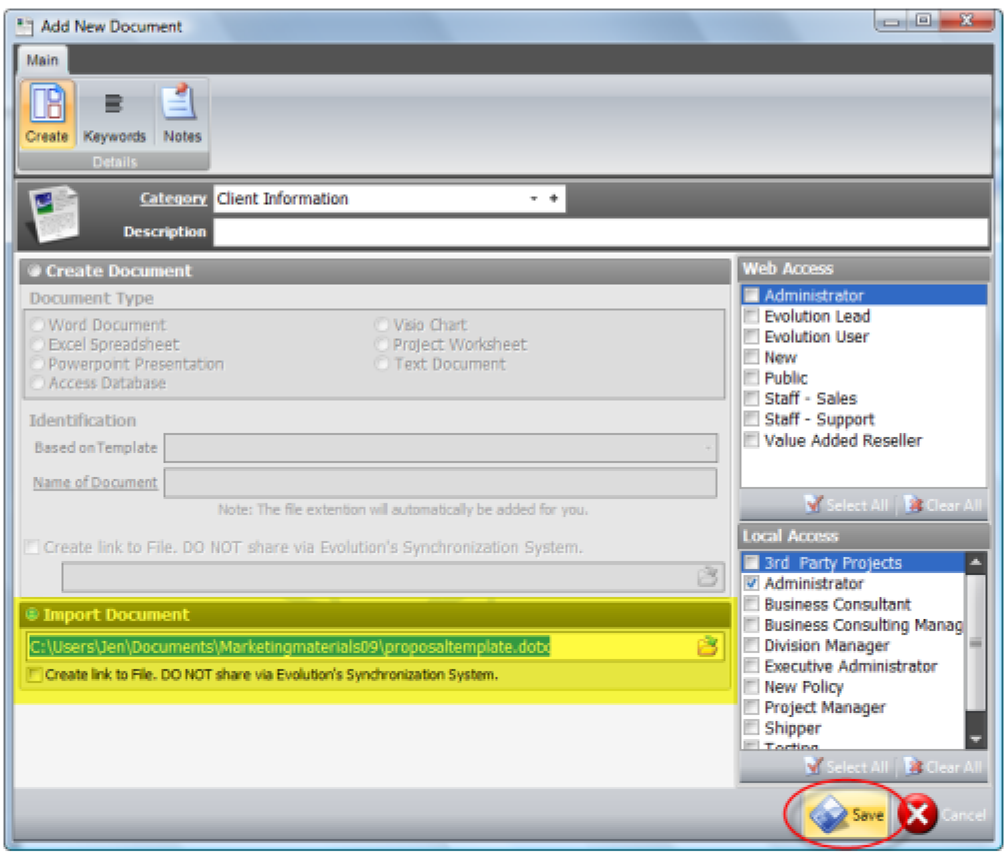


Click the 'New' icon to create a New document template. Choose the following options once the window opens:

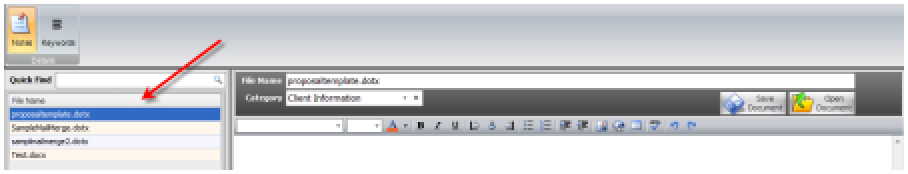
a. Document Category from the drop down menu
b. Import Document - To Import your Document from an external source
c. Browse for the Word Template location



Once the location of the file is found it will appear in the Import Document field.



Once the Save button is clicked the new Document Template will appear within the list of templates on the left.



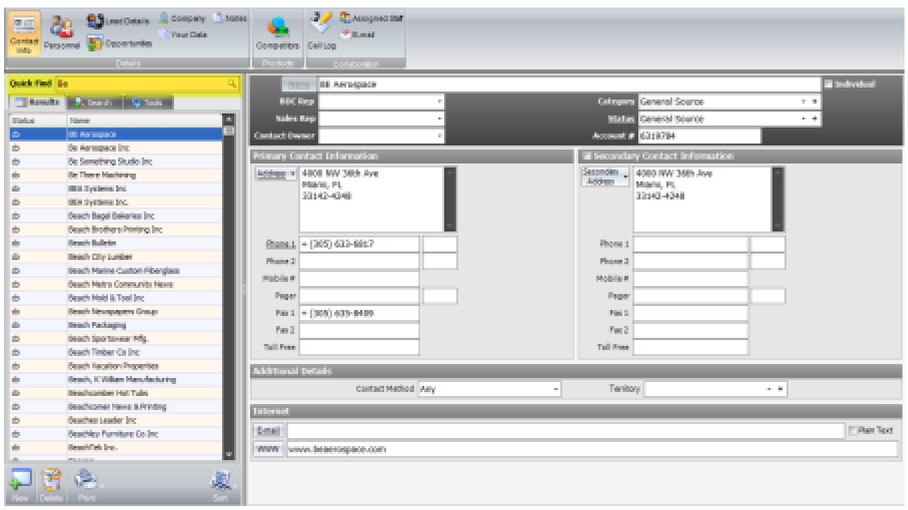
Now the Document Template is ready to be used within the Mail Merge Tool.

Mail Merge Part 2 - Using the Mail Merge Tool

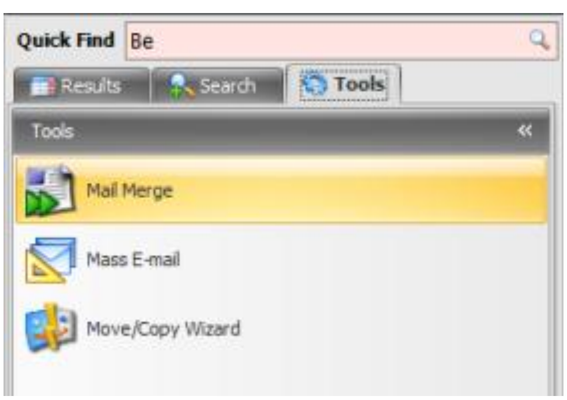
Follow these steps to create Mail Merge documents with Tradepoints Mail Merge Tool. ***The document template used in this example was created with Word 2007.***

First a contact search has to be done for the selected recipients.

1. Choose the section of contacts that a search will be generated from. ***This example brings up search results from Sources using a general search with the starting letters being 'Be'.***

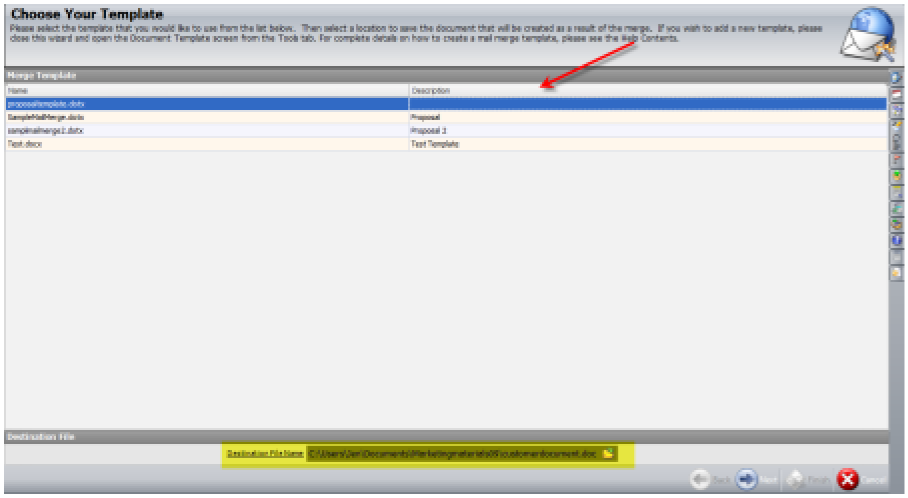


These Search results will then be brought into the Mail Merge Tool.

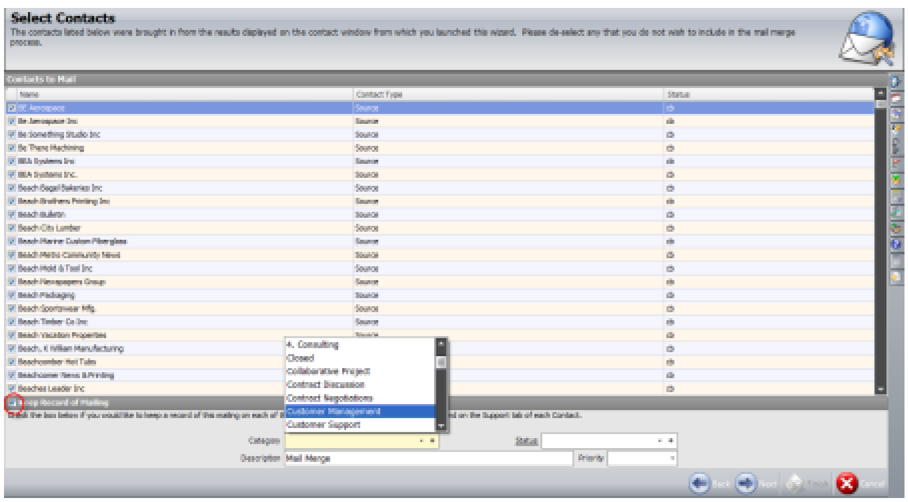


The first screen in the Mail Merge Tool introduces a wizard to walk through the steps of putting together a Merged Document. The second screen will show the options available from the Document Templates. ***(This is where any Word templates with the merge fields created and saved under Document Templates can be used)***

Available Document templates will be visible listed at the top of the screen. A field to browse and determine where what the resulting document will be located and named is highlighted.



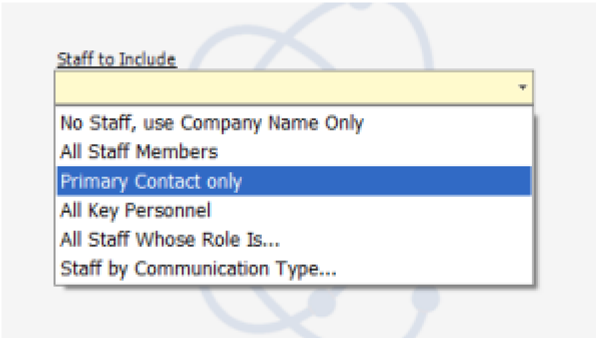
Click Next once the resulting merge document has been named and a location has been specified.



The search results specified at the very beginning will appear here.

1. Search results can be unchecked at this point.
2. An option can be set for the Mail Merge document to be saved as a Call Log to track who was included in the Mail Merge. Any results will be track able through the contacts information under Call Logs.

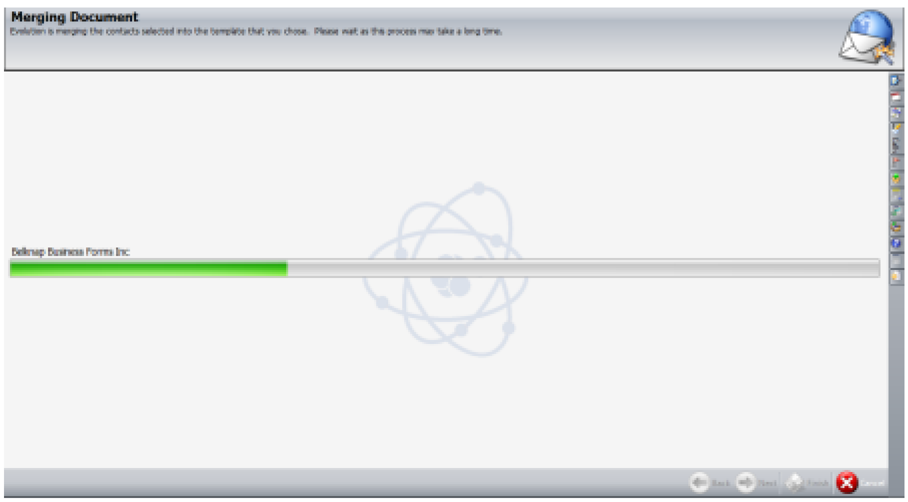
Click Next when ready.



The next option will ask to specify which contacts within your search results. If you are not sure then choose from either 'All Staff Members' or 'Primary Contact Only'.

This option allows for specific contacts within B2B contacts to be chosen. For groups using the B2C contact option 'All Staff Members' will automatically bring in each contact's information into Mail Merge.

Clicking next will give a screen showing a progress bar across the page. Depending on how many contacts are in the mail merge will depend on how long this takes.

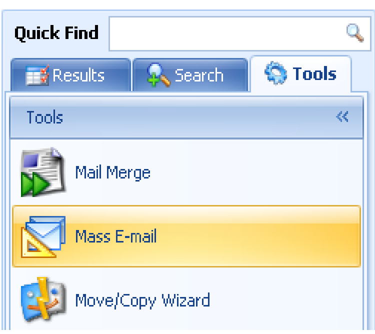


When finished the results page will appear. An option to Save the Mail Merge Document as a Document accessible to everyone under the Home tab is on the lower left.

To view the Mail Merged document click the icon in the middle of the screen.

Mass Email Tool

The mass email tool can be accessed anywhere you can access the Advanced Search Tool.

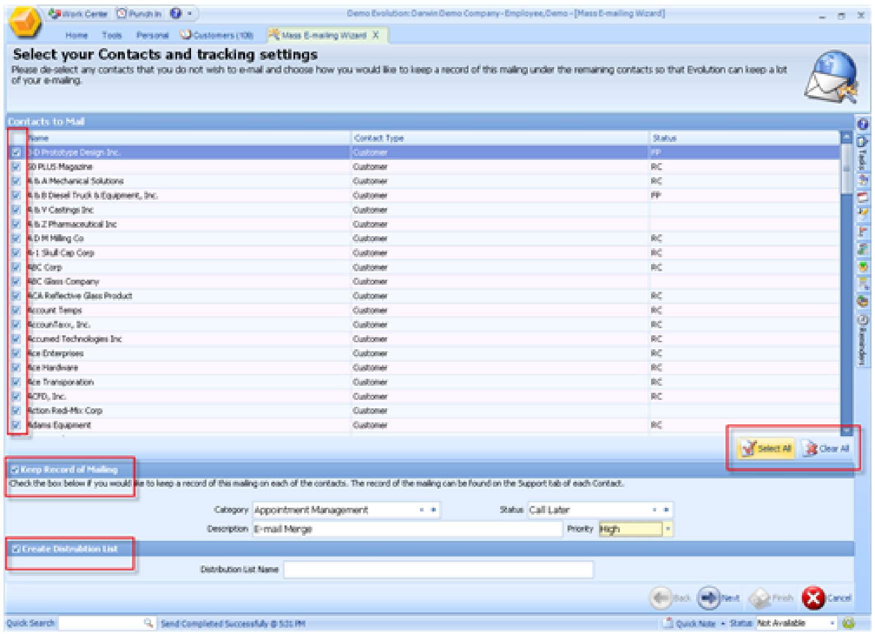


The mass email wizard will take you through the steps of creating your own mass email based on any of your search results you perform within Tradepoint.

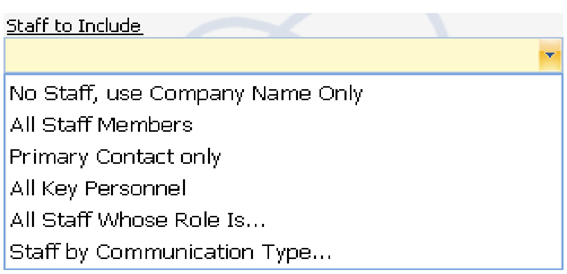
There are a few things to remember about Mass Emailing in general:

- Most ISPs will place restrictions on anyone sending out large amounts of email unless they are licensed and bonded so use this tool to send out very small groups of email in groups of 5 messages or less over a specified period of time.
- Your Email will be based on your search results within the Advanced Search Tool so search for the group of contacts you are looking to email first.
- You can create the email within the wizard or have an Email prepared through Email templates ahead of time that you can then edit as necessary.
- Attachments can be added to your mass Email and the wizard will walk you through this.

The first screen you will see in the Mass Email Tool will be the screen that will determine the main list of contacts that your email will be sent to. ***You will have an option later in the Mass Email Tool where you can specify exactly who within your contacts receives the email.***



Your search results will appear within the Mass Email Wizard with the option to Keep a record of the Mailing and create a Mailing List based on these search results. You also have the option of editing your mass Email list be Selecting all or by checking or un-checking specific contacts that are listed on this screen. Click the 'Next' icon when you are finished.



The next screen will include options to include additional individuals from your search results. Clicking on any one of these will also include any contacts within any of the classifications shown below in additional to the main email address of a contact. This can expand the main contact list depending on the options you choose.

For example if you choose to send it to 'All Staff Members' then multiple contacts within one company can receive the email and not just the main email contact.

Which email Account you would like to send this from (if you have more than one established).

If you send out regular emails from a service@, info@, sales@ or other general mail box then you will need to have that email address established within your Employee profile to be able to send outgoing email messages with a generic return email address.

The next option is the group size and in what time intervals you want your messages sent out. The default group size is set to 20. If you are a licensed and bonded email agent then sending larger groups of emails can be done easily without being blacklisted with ISP's. For businesses who are not then we recommend you set smaller groups to email. Tradepoint will email them out in smaller groups based on your preferences.

Track Statistics including who reads the email and who downloads any resources you have attached to the email.

A check box for enabling the Mail Merge fields with the same contact information you used for this Mass Email.

The next step will be attaching any resources to the Email. Resources would be any documents such as brochures, instructions or media you want to send to your contacts. A hyper link to your resources will be added to the body of the email for easy downloading. Click the 'Next' icon on the lower right when finished or to bypass this step.

The next and final screen for the Mass Email Tool is the body of the Email which can be composed directly or an Email Template can be used (as in the example of a Newsletter).

Be sure to proof your email since this is the last step of the Mass Email Tool.

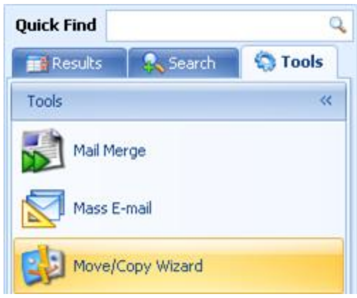
When you click the 'Next' icon here your Mass Email will be processed and sent out based on your search criteria and preferences set within the wizard.

Move and Copy Tool

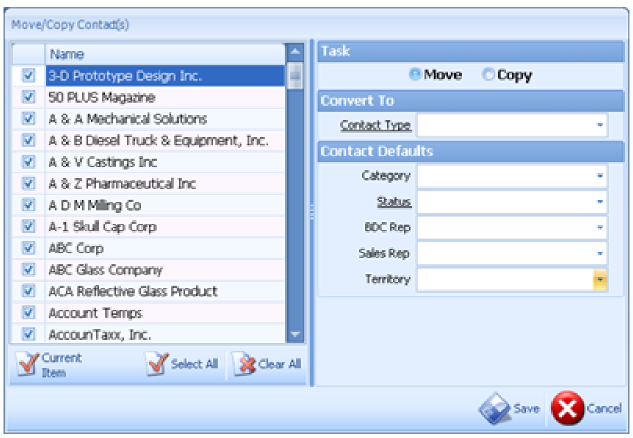
Located under the Tools tab in each section of Tradepoint's CRM the move and copy tool will be the tool that allows you to move your contact to the necessary section within Tradepoint reflecting your sales process.

This is necessary for managing your customer relationships in giving you the flexibility to change the type of contact when and how you need to. In relation to Sources the Move and Copy tool will also you to Source out your contacts based on different marketing and prospecting initiatives. Contacts can be moved to Leads easily and even assigned to specific sales people from the Move and Copy tool.

From the Tools Tab select the highlighted option for Move and Copy Tool.



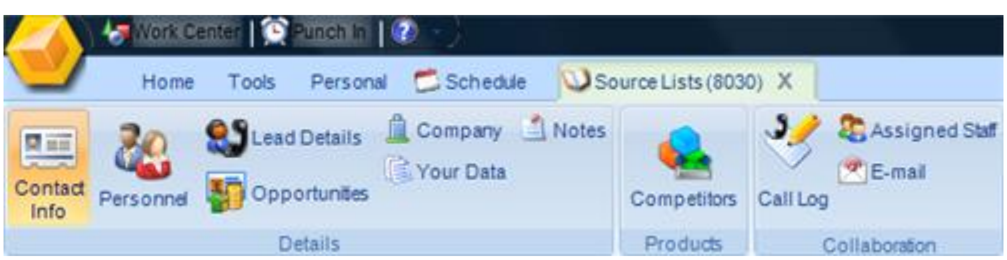
From there a smaller inset window will open with a number of options available. You will have the option of editing your search criteria and then selecting the type of Contact and related information that will be associated with the contacts you have selected.



The options for editing your search criteria are on the left and the options to either Move or Copy the contact to another contact type within Tradepoint are on the right. You will also have the options to select the Category, Status, BDC Rep, Sales Rep and Territory for your contacts.

Sources

The tool bar within Sources holds the tools that you will be able to use within each contact. Since the search results are listed out you will be able to jump from contact to contact and add/edit information as necessary. The tool bar below illustrates the functionality available for your Sources.



The functionality we will be reviewing in this section is outlined within each icon you see above. Each one of those icons hold functionality designed to maximize your CRM process when you use Sources as a part of your CRM.

The other sections of Tradepoint CRM include these functionality groups and either more functionality or less depending on the type of contact.

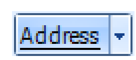
Below are the functionality groups in Sources:

- Contact Info
- Personnel
- Lead Details
- Opportunities
- Company
- Your Data
- Notes
- Competitors
- Call Logs
- Assigned Staff
- Email

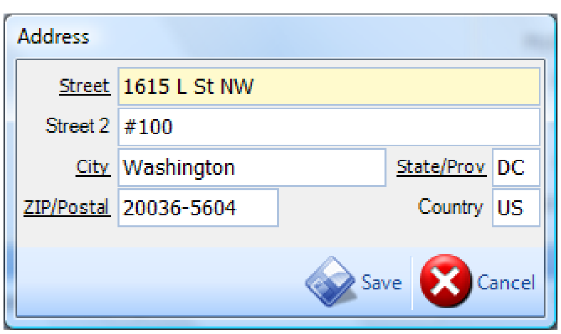
Contact Info is the first icon on the tool bar and the default screen you see when you open contacts in Sources as well as any CRM section of Tradepoint.

Contact Info

Contact Info holds the basic contact information and preferences for each contact. Automatic formatting for addresses and phone numbers exists for your information. Use the TAB key to jump from field to field and easily enter in contact information one field at a time

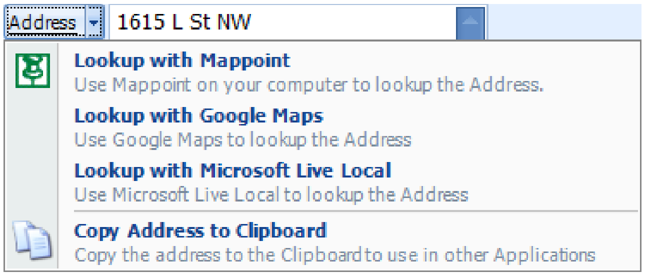
Various icons hold tools for formatting so you only have to enter the information once. Use the address icon 

to enter in your contact's address, if you are doing this manually.



Use this tool and you won't have to repeat any data entry within Tradepoint. All the activities for this contact will be entered in automatically.

Use the small arrow on the right of the address icon to open additional built in tools for mapping out the physical locations of your contacts automatically. This is ideal for an outside sales force or service representatives that have to make on site visits with clients. The customer lookup option supports the ability to use Mappoint, Google Maps, or Microsoft Live local directly on the computer with Tradepoint. An Internet connection is required for Google Maps or Microsoft Live Local.



If you have an internet connection on the computer at the time this will open the web based applications for Google Maps and Microsoft Live Local. Otherwise, Tradepoint will open up Microsoft Mappoint to use as a desktop application to map out the locations of your contacts.

Both the Primary and the Secondary contact in the Contact Info section have the mapping tools that will automatically map out the respective contact information in that address section.

Other screen tools:

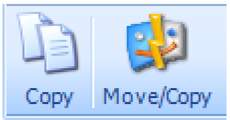
- The email icon is live and will look to send an email to any email address you have in the email screen.
- The www icon will open any web address you have listed in the www field. Of course, if there is nothing listed then no web page will open.
- At the top of the Contact info window is the individual option for business to consumer contact. Checking this option will automatically format your contact from the default of business to business to business to consumer.
- What is important to remember about this feature is business to consumer contacts often have multiple individuals listed under the one contact. Should you change the contact to an individual those contacts will be deleted. Yes, you will be prompted and notified to this effect when you choose this option.
- The contact name will also need to be formatted using the name icon so any activity associated with this contact will follow accurately.

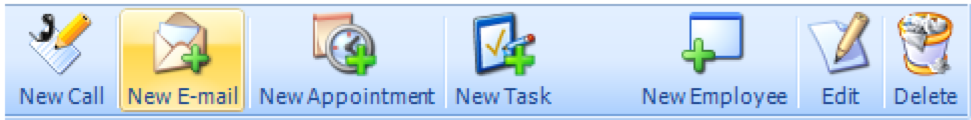
Personnel

For business to business contacts, the ability to keep multiple Personnel within one contact is necessary and you will have that ability with this section. Clicking on the Personnel icon will show any Personnel listed within a given contact.

From the main Personnel screen you will see several icons at the bottom of the screen that will indicate functions that can be performed in just a few clicks with any highlighted Personnel.

Personnel contacts will be listed based on hierarchy with the email address and the phone number visible on the main screen. Tools for each personnel contact are shown in the tool bars at the bottom of the screen.





Each tool here indicates the action that can be performed when a contact is highlighted.

Copy – The copy tool allows you to copy the contact to another location including outside file types such as Word documents.

Move/Copy – Move or Copy your contact to different contact within Tradepoint CRM. You will be prompted with a screen to help you move and copy your contact to another contact within Tradepoint.

New Call – Generate a New Call Log by highlighting a Personnel Contact and choosing this option. The New Call log will open with the contact's information in the appropriate locations so you can complete the call logs with the relevant details.

New Appointment – Create a new appointment with the Personnel contact's information pre-populated into the Appointment window. Simply fill in any Notes, set any reminders and send out invitations and you are done.

New Task – Similar to new Appointment, create a new Task with the Personnel contact's information already populated in the correct fields within the Task window. Set reminders, add other attendees you want to be notified and attach any Documents as necessary.

New Employee – Create a New Personnel Contact by using this option. The window will open with the ability to fill in additional information, multiple phone numbers and email addresses.

Further activity in an Employee file can also be tracked including:

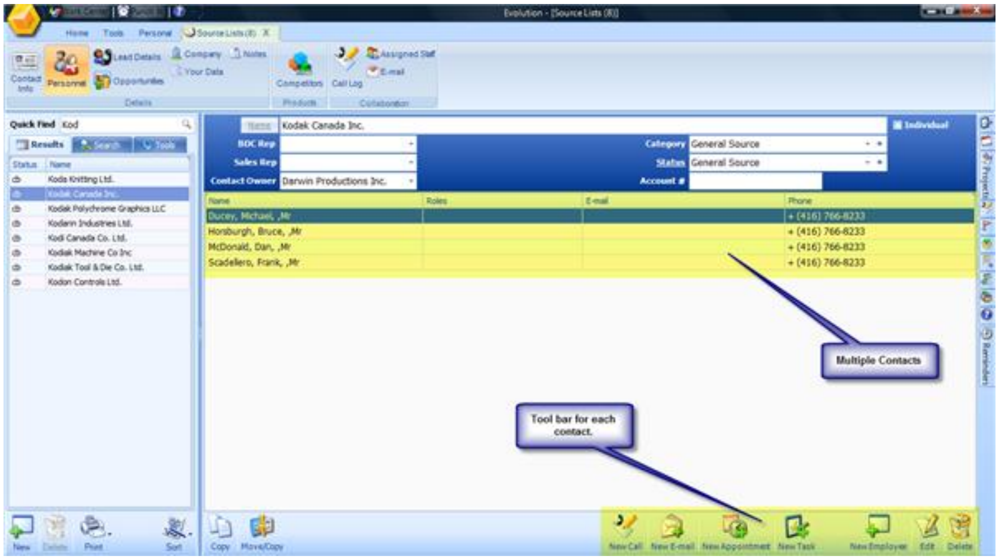
- Tasks
- Appointments
- Custom fields to suit your work flow
- Products on Loan – ideal for trials of different types of equipment before purchasing or for loaner pieces if you provide any service to your clients on products
- Documents
- Security logins for your website
- The history of logins to your website
- The history of downloads to your website

Use the Address wizards within the New Employee icon to have additional activity follow this Personnel contact properly.

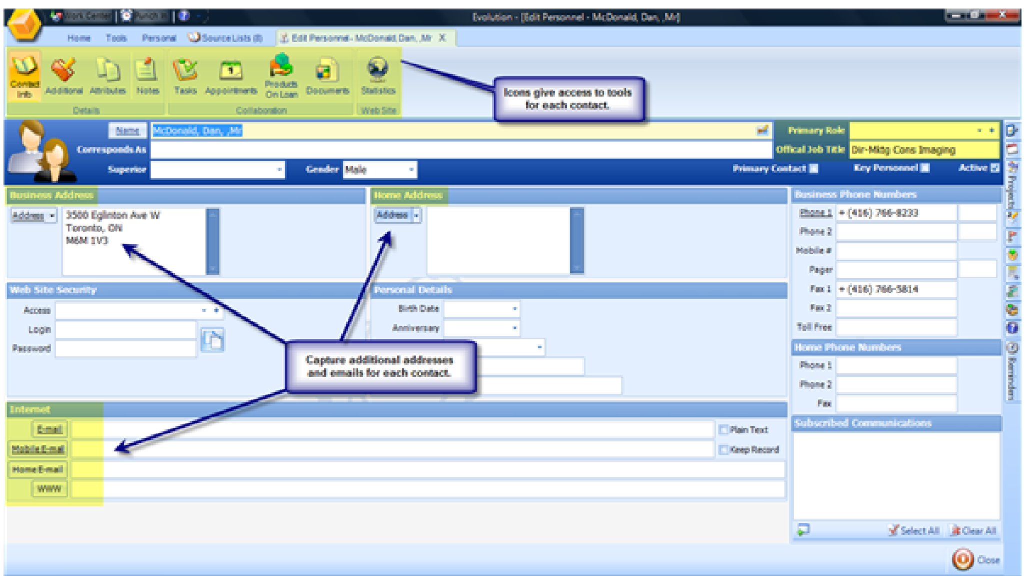
Edit – Highlight an existing Personnel contact and click on this icon to open it and edit the information as necessary.

Delete – Highlight a Personnel contact and click the Delete icon to Delete it from your contacts. ***This function can be controlled by security settings on a profile by profile basis.***

Each Employee within a business to business contact will have multiple tools available for taking actions and tracking information. The main screen for contacts within a business to business contact will appear like the screen you see below when there is more than one contact.



The main Personnel screen will have a tool bar at the top that will enable you to take actions in relation to specific Personnel contacts. The view below shows the main personnel screen when you add an Employee/Personnel contact to a business to business contact.

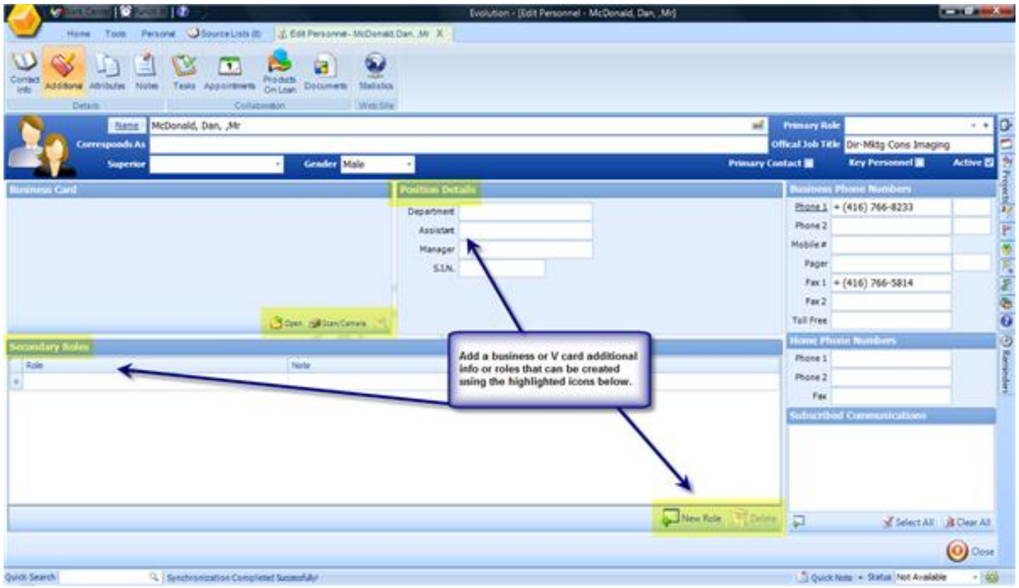


Main contact information will be added to contacts automatically so additional information including multiple emails and contact numbers can be added as necessary. The address icons include the wizards for accurate data entry and the email icons are live for easy emailing from this screen.

Contacts that are imported will be imported into this section. The Data Import wizard will walk you through the steps of importing personnel contacts in relation to your business contacts.

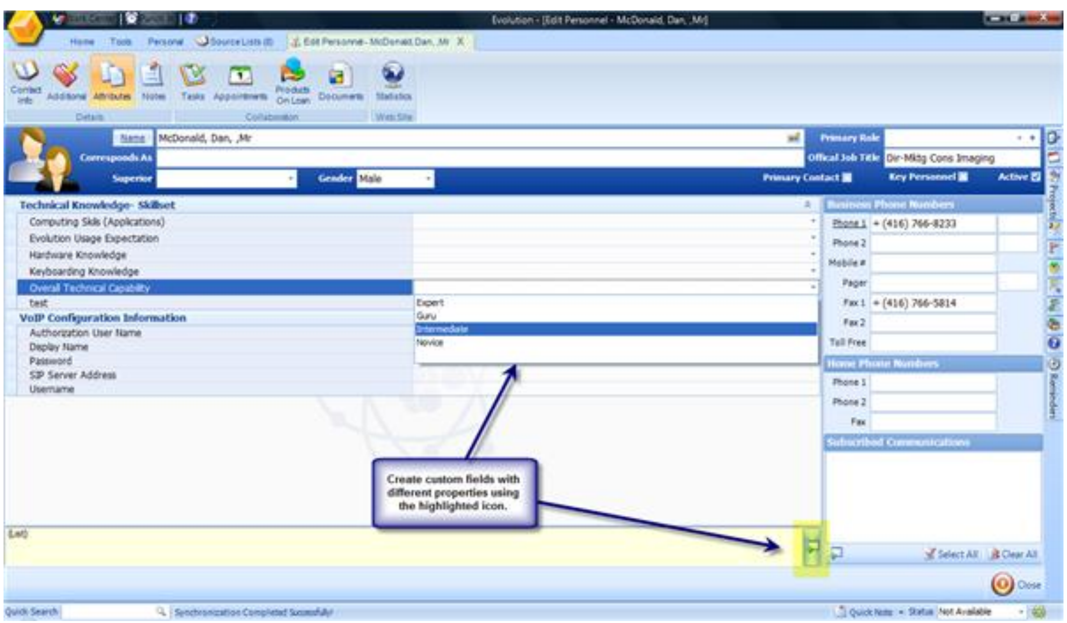
The icons at the top of the image above illustrate the tools available for each contact. The following images and examples will show what you can do with this.

Additional Information holds exactly what it describes. Information can also be imported into these fields as well.



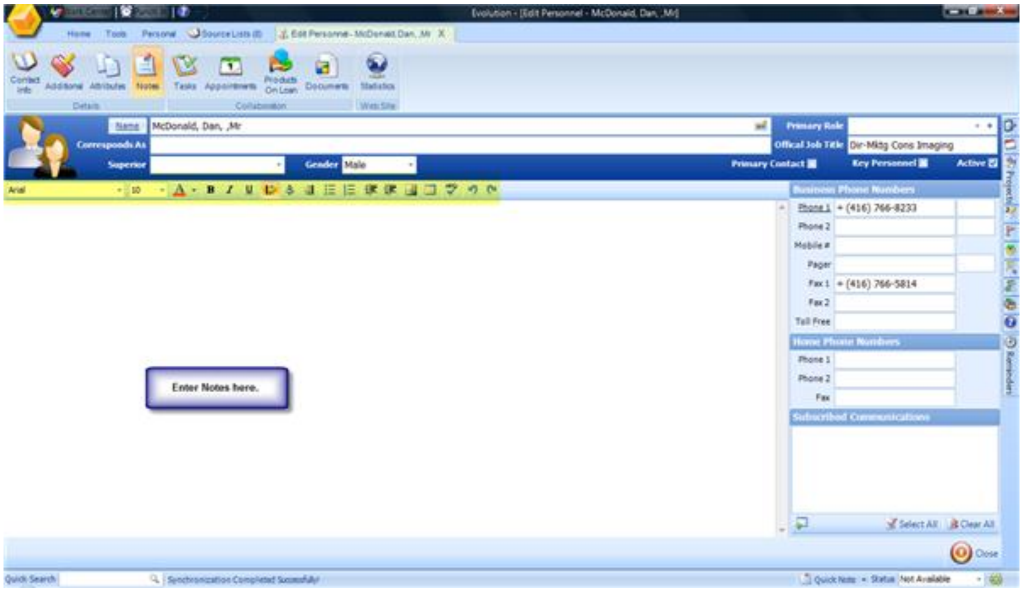
Electronic business cards (or Vcards) can be entered here. There is a right click option to add a business card directly from the email that it was sent on for convenience.

Attributes will allow you to create custom fields as necessary. The example below shows custom fields for proficiency within the IT industry.

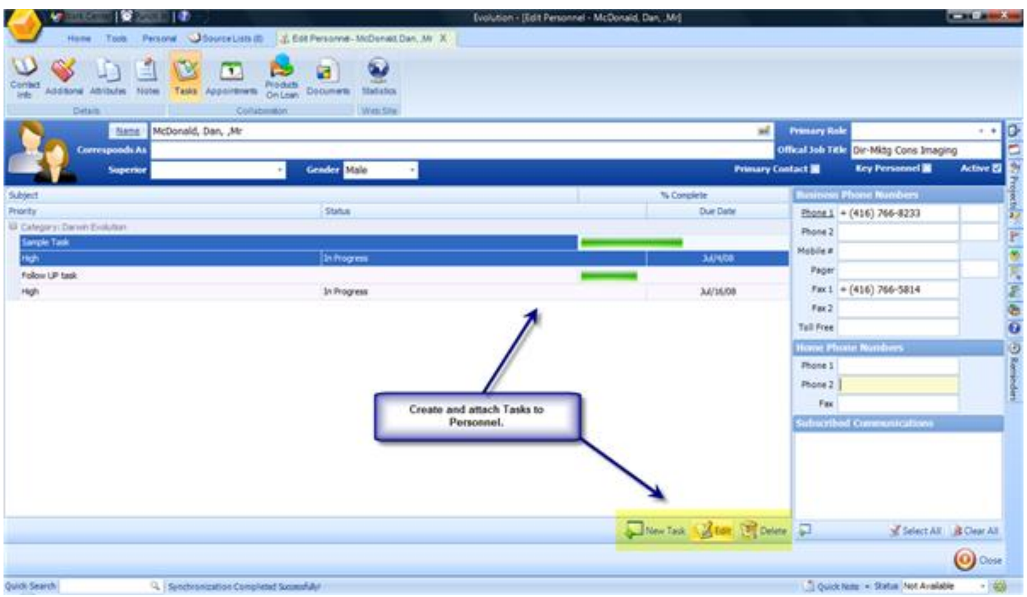


The highlighted icon opens to a screen that will allow you to create and assign properties to a given field so it can be a drop down menu, check box, a list(as shown above), open field, time/date stamp, or numeric calculations to name a few.

Each Personnel will have an open Notes field for information that can be stored in a open format. This Notes section has editing tools that are highlighted at the top of the screen.

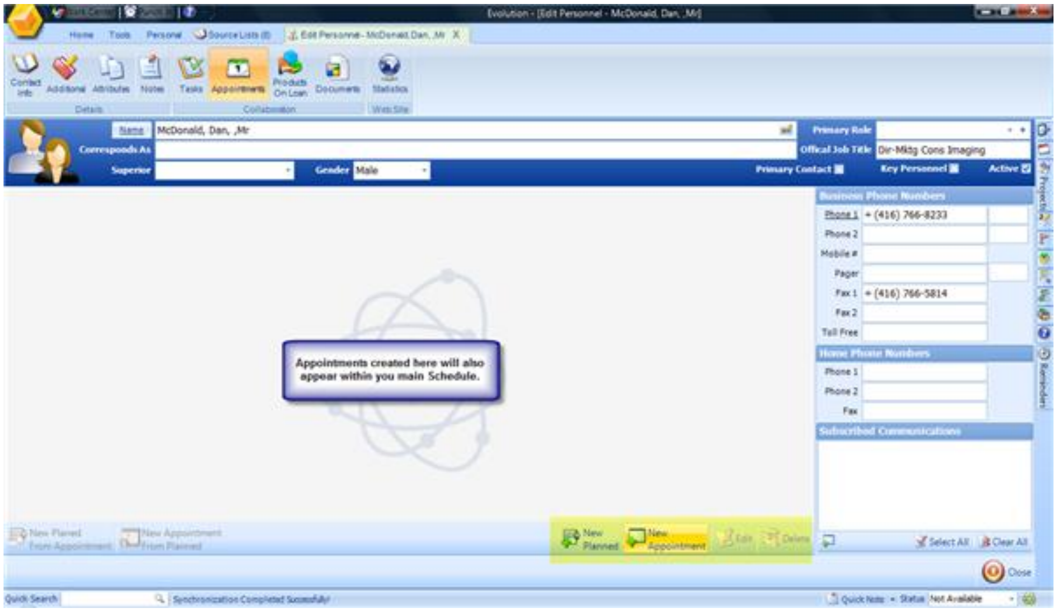


Tasks can also be created from this section of a contact. When you create a Task from here this contact will automatically be added to the Task. ***When a Task is created from a client account it will also be visible from the main account screen under the Tasks icon.***



Tasks will show any partial completion with the green bar and the main details are visible. Drilling down into a Task can be done by double clicking any listed Task.

Appointments created here will populate into the main schedule for everyone associated with an Appointment. Creating an Appointment from a Personnel screen will automatically add the Personnel contact to the appointment.



The main difference between a planned appointment and a New Appointment is the time within a New Appointment has been confirmed and a Planned Appointment has not been confirmed. The screens reflect this and you will not see the time fields within the Planned Appointment screen.

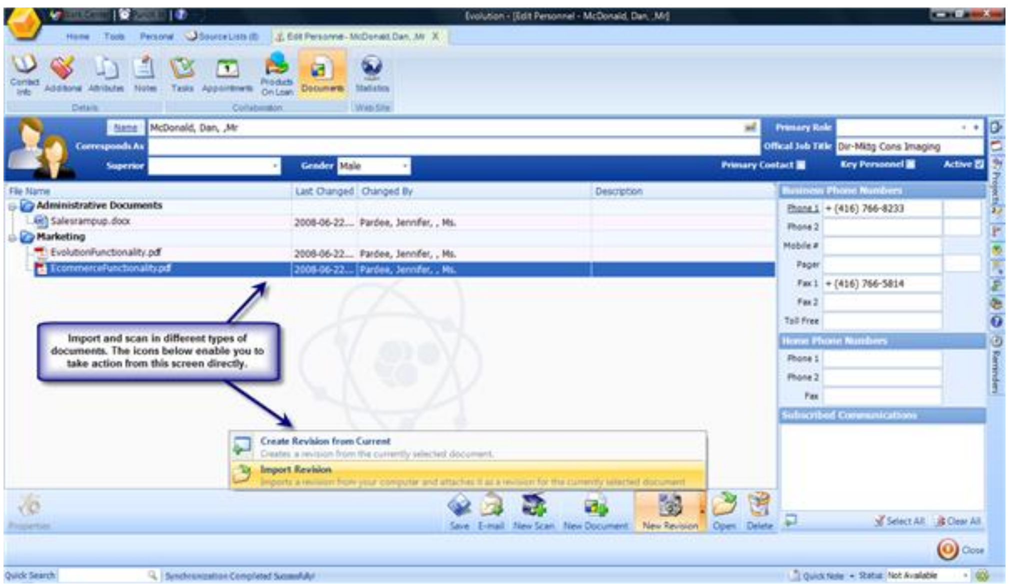
Products On Loan is a tool for companies that will allow you to track Products that you have given to a specific contact. Some examples where Products on Loan may be relevant include:

- Sample or test products
- Loaner products/equipment for warranty service
- A trial period for a Product

Products On Loan functionality is also available for the main Employees section as well.

Tradepoint allows you to attach or scan in Documents all throughout the system. The core Document Management functionality is consistent throughout Tradepoint. Some areas where you will be able to use the Document Management functions include:

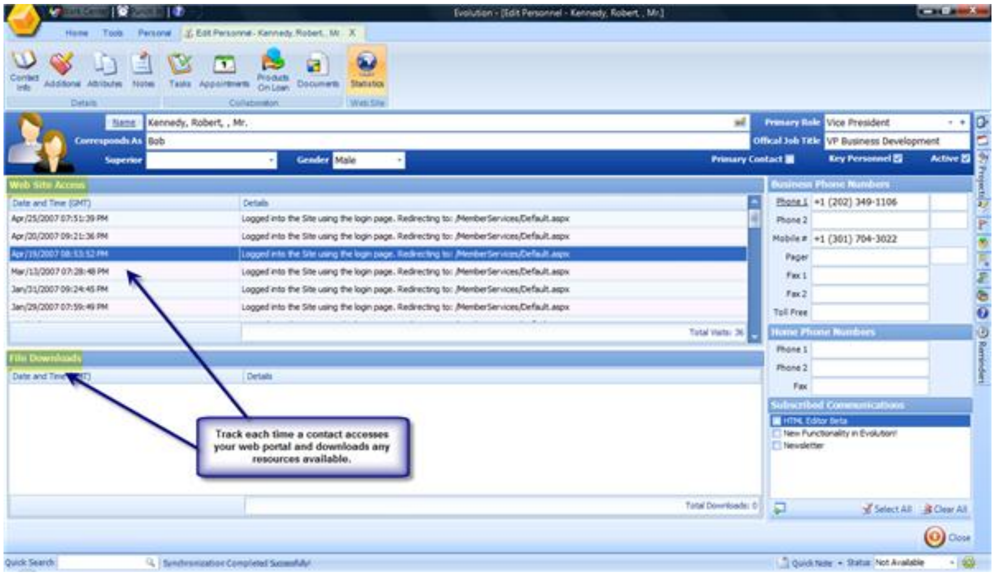
- Contacts
- Contact personnel
- Employees
- Products
- Tasks
- Appointments
- Projects
- Knowledge Base Articles
- Press Releases



Full functionality for Document Management will be available anywhere in Tradepoint you can scan in or Import a Document.

For companies using any one of our Ecommerce solutions the Web Statistics section for Personnel is relevant for tracking anytime someone logs into your web portal or downloads and resources. A resource can be a document or a link to a video for example.

Each time someone accesses your web portal or downloads a resource it will be time and date stamped and show the path they took within your portal for each time that person accesses your web portal through your website.

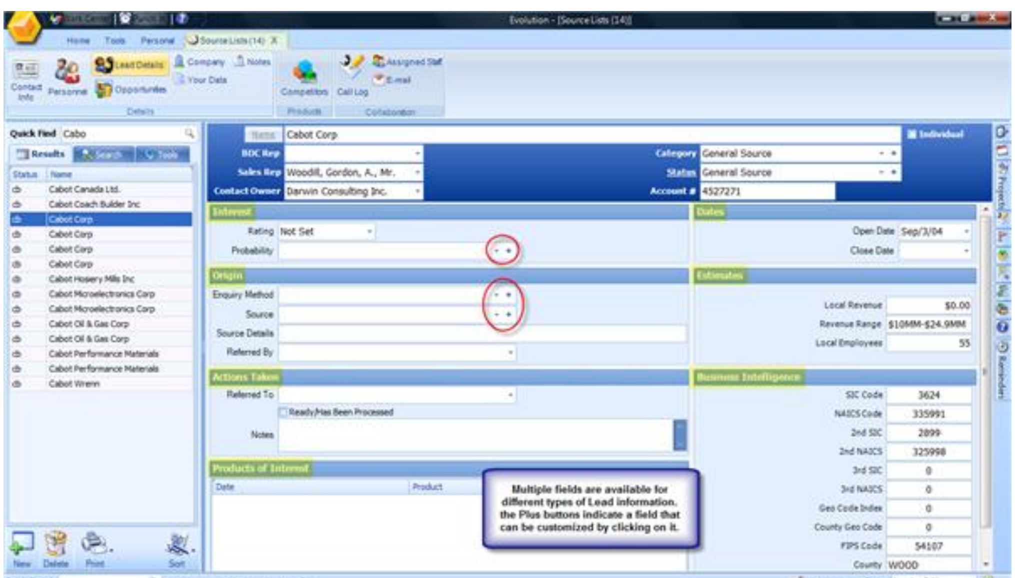


This example shows multiple logins to the web portal but no downloads. The path on your website is detailed in the field next to the time and date stamp and keeps track of the total for how many times someone has accessed your web portal.

Lead Details

Each contact in Tradepoint will allow you to store different types of related lead details. The Lead Info icon will direct you to a screen. On this screen your information can be:

- Imported through the Data Import Tool
- Directed from a specific web page (for web based referrals for companies using the Ecommerce solutions
- Fields with the plus next to it can be customized with expandable drop down menus

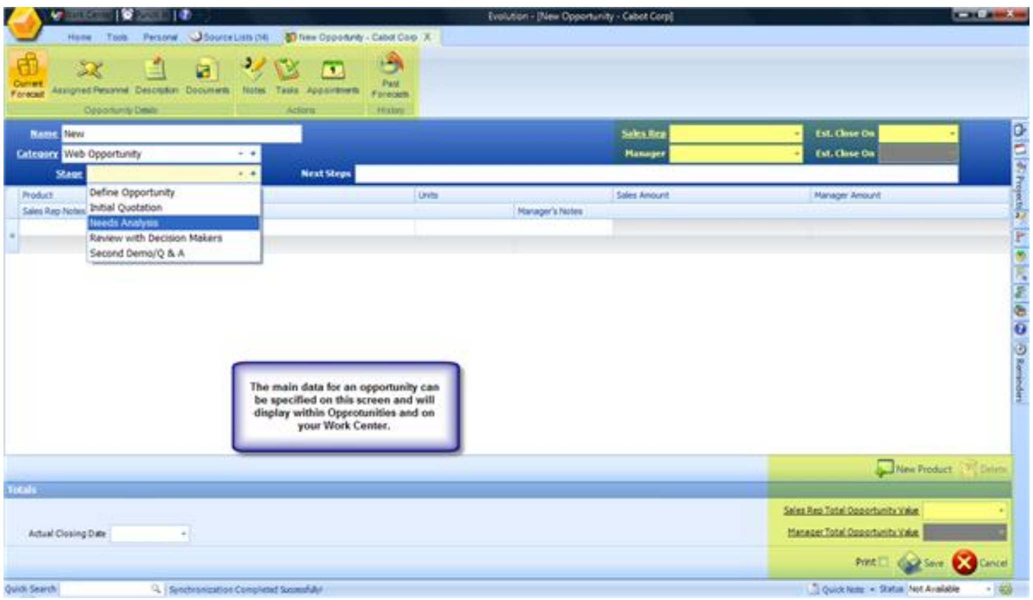


Opportunities

Recognizing that potential sales opportunities can happen with any type of contact, sales opportunities can be tracked within each type of Contact. Opportunities are ideal for a consultative sales process or any sales process that includes a proposal and assessment.

Your opportunity will show up within your contact account, My Business reporting and on your Work Center. The main screen is showing below.

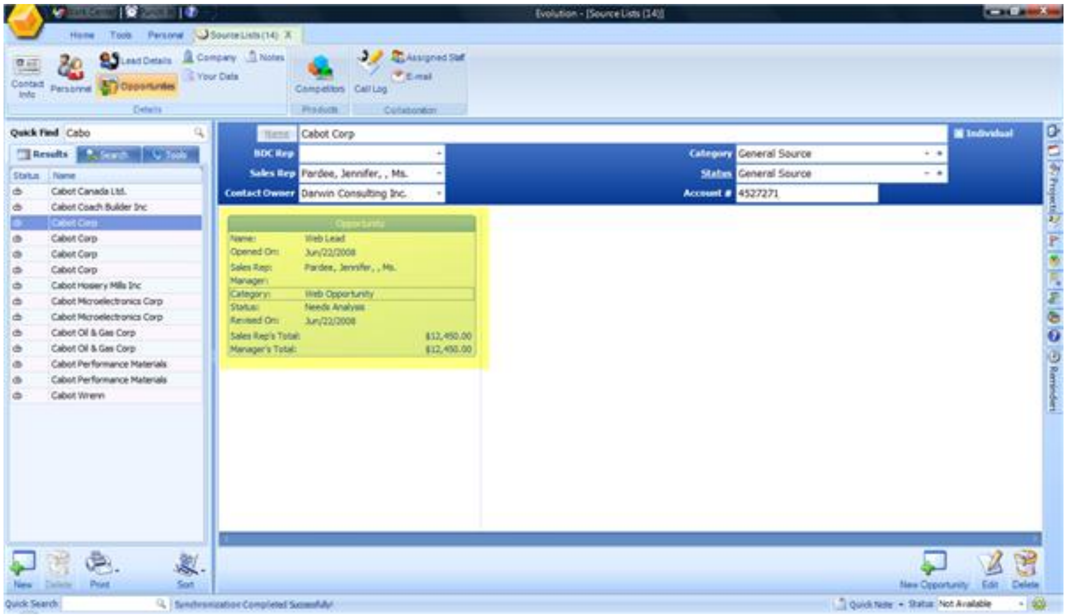
Icons at the top of the screen show actions that can be taken within a specific opportunity. Your Sales Cycle is determined by the Category and Status shown with the drop down menu.



Tradepoint's Opportunity structure includes a space for a sales rep value and for a manager. This will account for a change in the potential sale by a manager (this won't apply to all sales processes). If this does not apply to your sales process then simply leave these fields blank.

Opportunities will also appear within the Work Center dashboards and within any Opportunity reports that can be generated within My Business reporting.

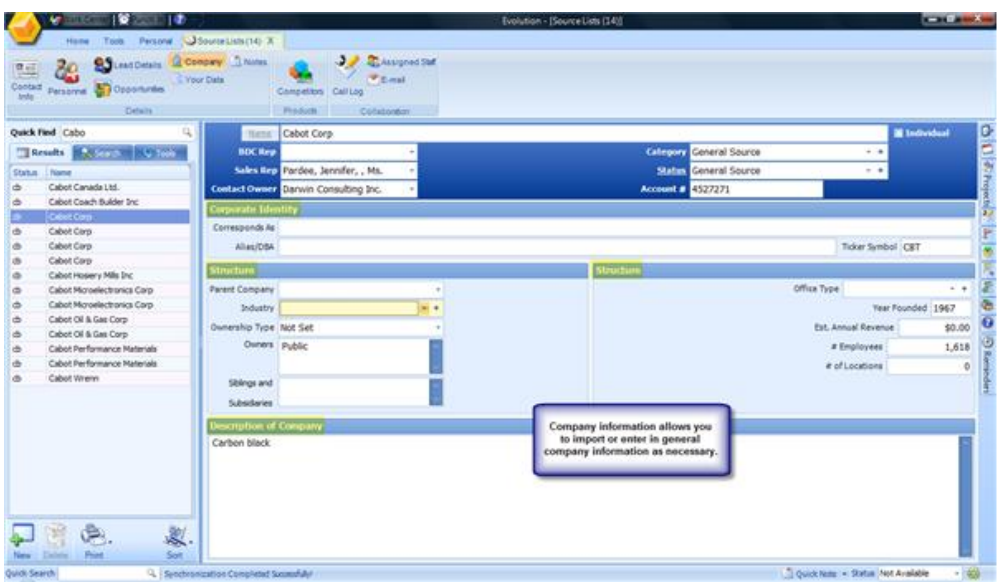
When your opportunities are completed they will be listed within each account shown in the example below.



As Opportunities are closed you can enter in the date within each Opportunity. The results will adjust automatically within the Work Center and within the My Business reporting.

Company

Keep track of company information and other general data about your contacts. Each of the fields will hold additional details and each field with the plus button can be used to create additional options within a drop down menu. The ‘Description of Company’ field is an open field for information/images that can be copied/pasted into.



The data import tool will allow you to import data into this section for contacts. So, any source list you use with general company information can be imported into this section.

Your Data

Since each business has specific information and processes often applicable to only that company, customizable fields are important for businesses. The structures of many software applications often do not allow for customizations without a great deal of expense creating a situation where a company has to squeeze itself into a software application to use it. As a result, internal processes often become more complex and employees end up spending more time working with the software rather than their actual job responsibilities.

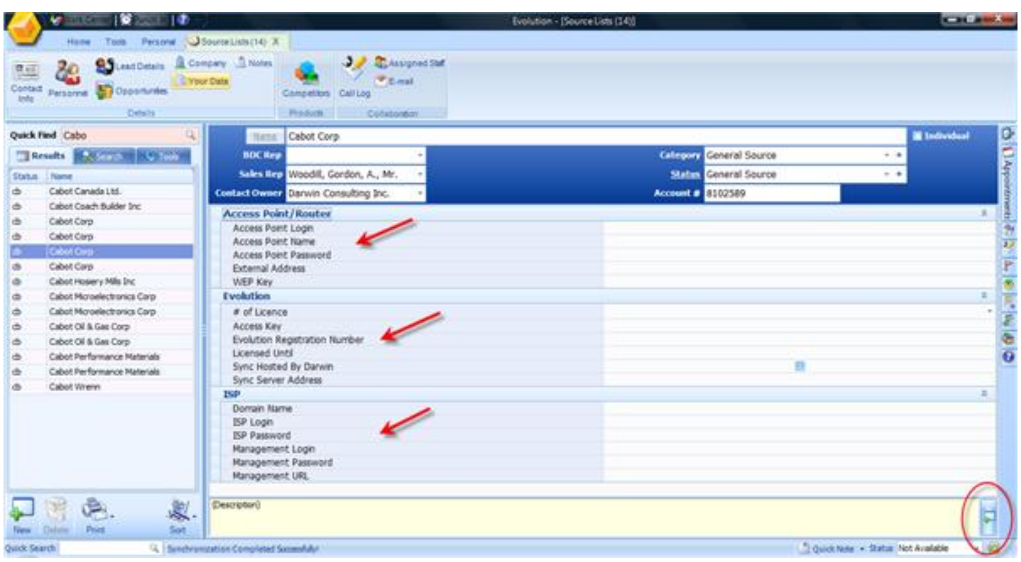
With Tradepoint there are several ways you can customize data to suit your specific needs. The first is User Access Settings. Profiles can be established to suit different roles and individuals can even change the look and feel with different colored interfaces. The second is our Plug-in system which is an affordable way to create and customize fields and tags(labels next to the fields) to your process specifically.

The third way can be seen within several places throughout Tradepoint in sections such as Your Data. In this section you have the option of creating groups and field within groups of data that is specific to your process. You specify the title and then the type of data that can be entered into that field. That data becomes part of your database and is completely search able.

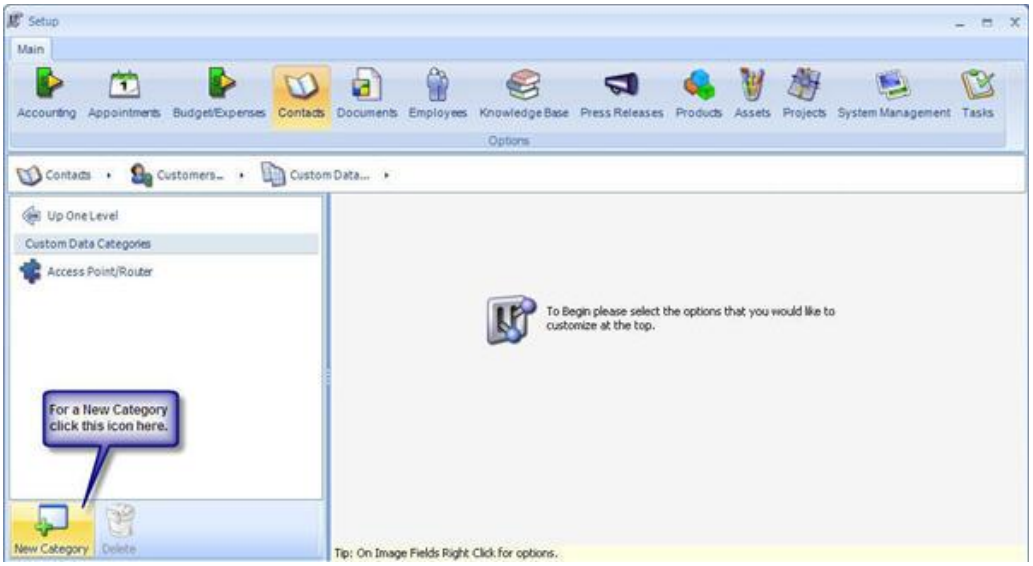
The Your Data screen allows you to store any information you would like that is not contained on any other screen by creating custom data fields. The really powerful part is that you can specify what kind of data is allowed to be stored in these fields so that you can force users to enter information in a structured way ensuring that you will be able to use the information in searches without having to guess which format it was entered in.

Examples include IT based information such as Computer and Network Requirements for an Installation, Specifications for Industries such as Building Construction, Architecture, Water and Soil testing, Accounting, Legal, and Patient work flows for Medical Practices in specialties such as Orthopedics.

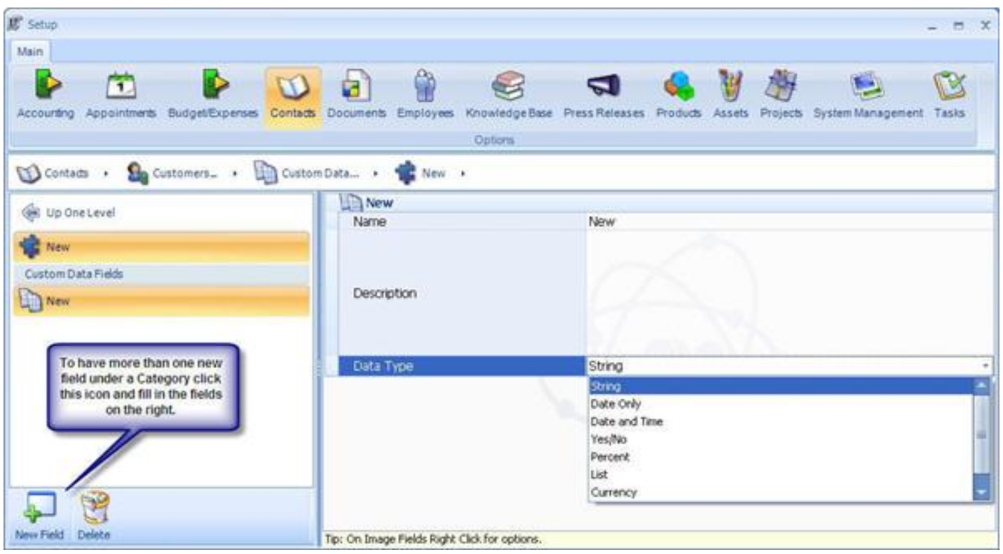
Below is a screen view of some established categories as an example.



The Setup & Configuration Tool will open once the New Custom Field Icon is clicked. The first screen you will see within the Setup & Configuration Tool will be within the Your Data section of Customers so you can create a New Field within the Your Data Section of Customers.



Click on the ‘New’ category icon if you are looking to create a New Category Field.

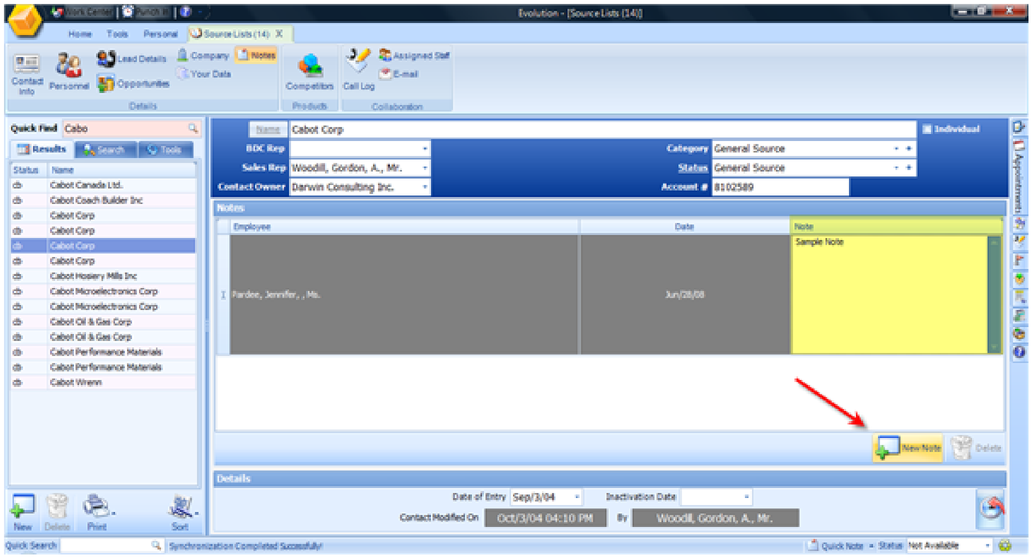


To create a New Field within an existing Category click on the New Field icon in the lower left corner. Multiple Fields can be within one category if it is necessary to track different types of information. Each specified field can hold different types of data as illustrated with the drop down menu. Simply choose which type for each field. When you are finished close the Setup and Configuration Tool by clicking the 'X' icon in the upper right hand corner of the Setup and Configuration Tool.

Custom Data fields can be added from the Options window as well as a specific section such as Customers and can be specific to a contact type or shared across all contact types.

Notes

Each Contact within Tradepoint will have a Notes section for any type of Notes. Each entry will be time and date stamped and stored in chronological order as they are created.

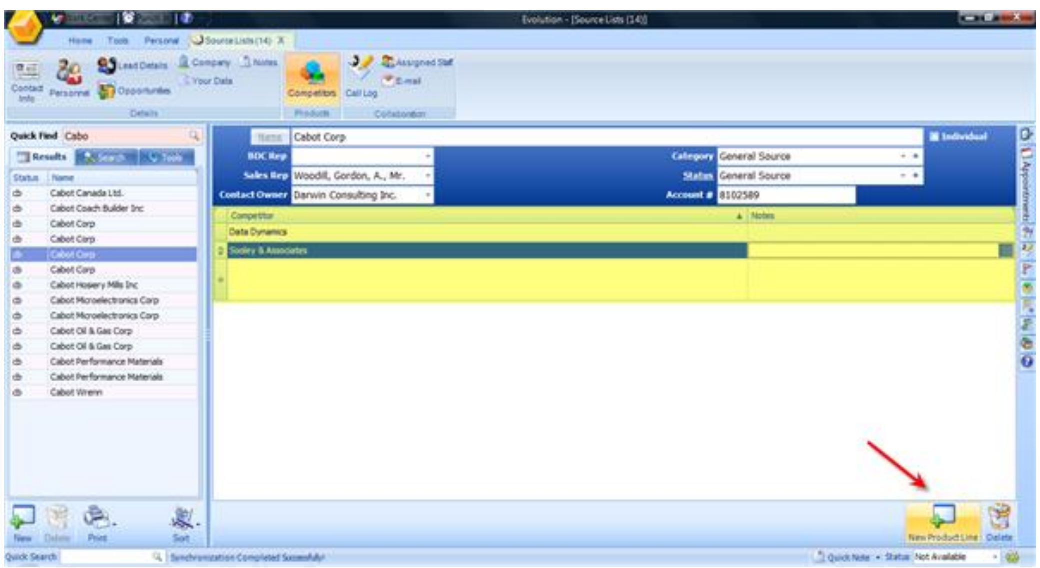


The Employee who created the Note as well as when the Note was created is easily visible from this screen. Creating a new Note can be done with the highlighted icon you see in the image above.

A scroll bar will appear as more Notes accumulate within your contacts. Notes will follow any contact is they are Moved or Copied to another section within Tradepoint.

Competitors

Each Contact has a section for Competitor information relevant to your contacts, called Competitors.



The Competitor fields will draw from your Contacts including Competitors (accessible from the Home Tab) and from your Suppliers as well.

The Notes field next to the Competitor field is there for any information you want to keep track of for a give competitor such as:

- Similar Product Lines

- Pricing
- Specials

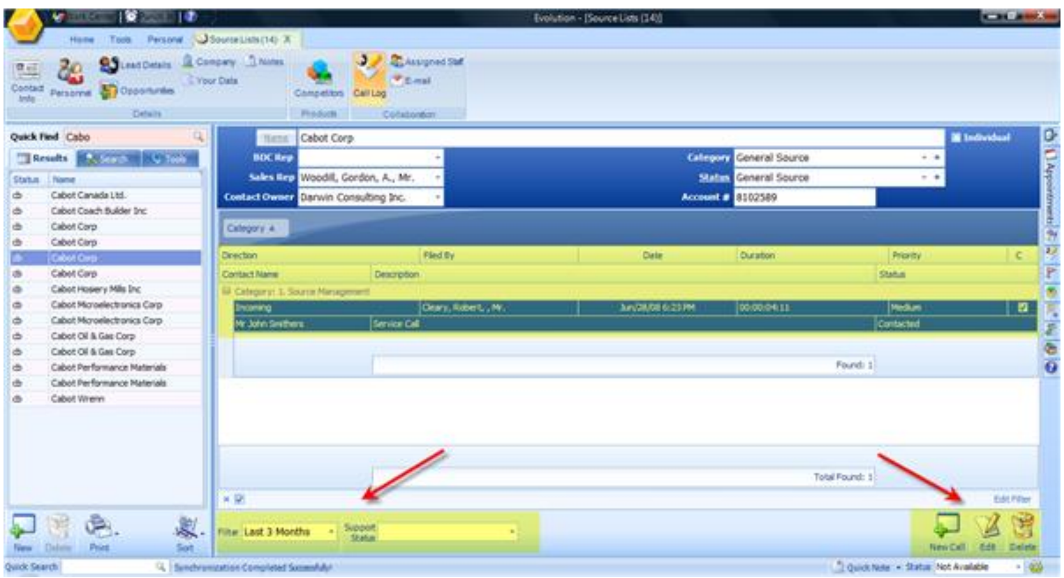
Additional Competitor tools within Product will allow you to track competitors for your website in relation to each of your Products.

Call Logs

For Companies providing direct support and service to your customers Call Logs is a built in functionality designed to track all incoming and outgoing phone activity in relation to your contacts. There are a few things to keep in mind about Call Logs:

- Tradepoint can integrated with most VOIP providers for a more seamless call center work flow.
- Call Logs do link in with Appointments, Tasks and Orders in relation to a contact.
- Activities resulting from a Call Logs will also display independently from a Call Log for easier searching and easy access to each activity through the Flyout Panel and Reminders.

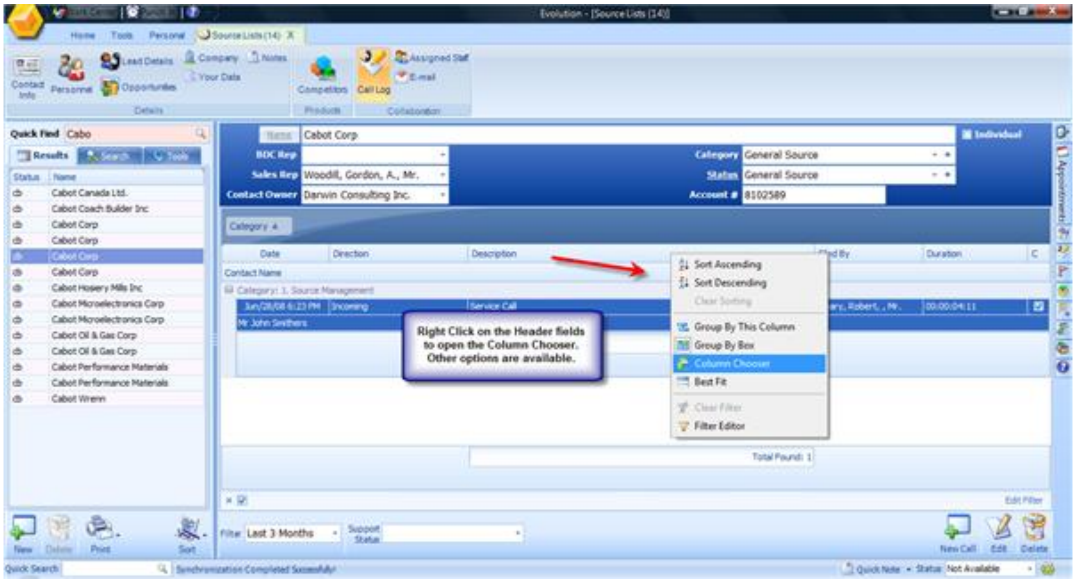
This is the main view of Call Logs as they will appear in relation to a contact.



Relevant details are shown in the fields above. History filters are highlighted in the lower corners for easy searching as you acquire Call logs for contacts over time. Editing tools are on the lower right.

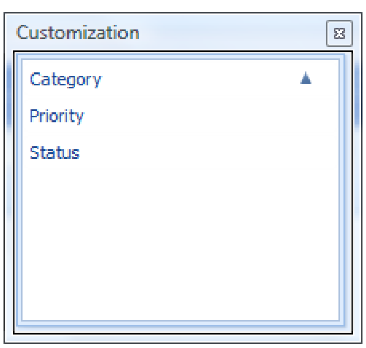
Your display for Call Logs is also editable. The header fields that show the titles of fields above the blue highlighted fields can be adjusted using the Column Chooser. Right clicking on any Header fields within and section of Tradepoint will open the column chooser for you to remove or add fields with data to be displayed.

You can see the Column Chooser below after it has been opened with a right click.



Other options for your header fields include:

- **Sort Ascending:** Sort existing entries by field in ascending Order. This means if you right click on the 'Date' field and you choose ascending then all of the Call Logs will be ordered by Date from most recent to the oldest in your system.
- **Sort Descending:** Sort existing entries by descending order. This means if you right click on the 'Date' field and choose Sort Descending then they will appear in order from oldest to newest on your main display.
- **Group By This Column:** Highlighting any Header field and choosing this option from the Column Chooser will automatically sort all Call Logs by this type of field. This means if Direction is right clicked and the Group By option is chosen then automatically all Call Logs will be sorted and displayed by Direction.
- **Group By Box:** This option will remove the top field where you see 'Category' and simply group each Call log by the header field box.
- **Column Chooser:** The Column Chooser will allow you to choose from other exiting options to drag into the Header fields and take away fields that are showing for a simpler look within your Header fields. Your Column Chooser will appear as you see below.



Simply click and drag any item showing from this box to where you would like it to display on your Header fields within Call Logs. Each Column Chooser in different parts of Tradepoint will display different option depending on where the Column Chooser is.

- **Best Fit:** the Best Fit Option will arrange your fields and Headers to optimize the appearance in size and layout on your screen. If you just want to tidy up the appearance of your fields use this option.

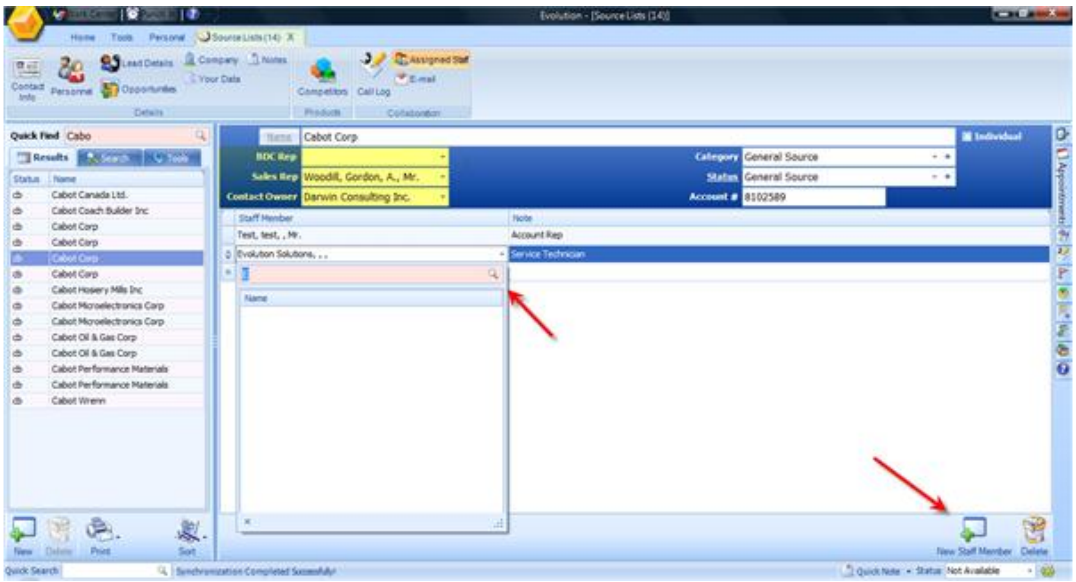
Each User will be able to control the appearance of their own information throughout Tradepoint using the column choosers. Changes within the column choosers do not apply system wide.

Assigned Staff

For companies that use a team approach in sales or who assign specific Employees to a contact Assigned Staff will be able to track who has been assigned to a specific account.

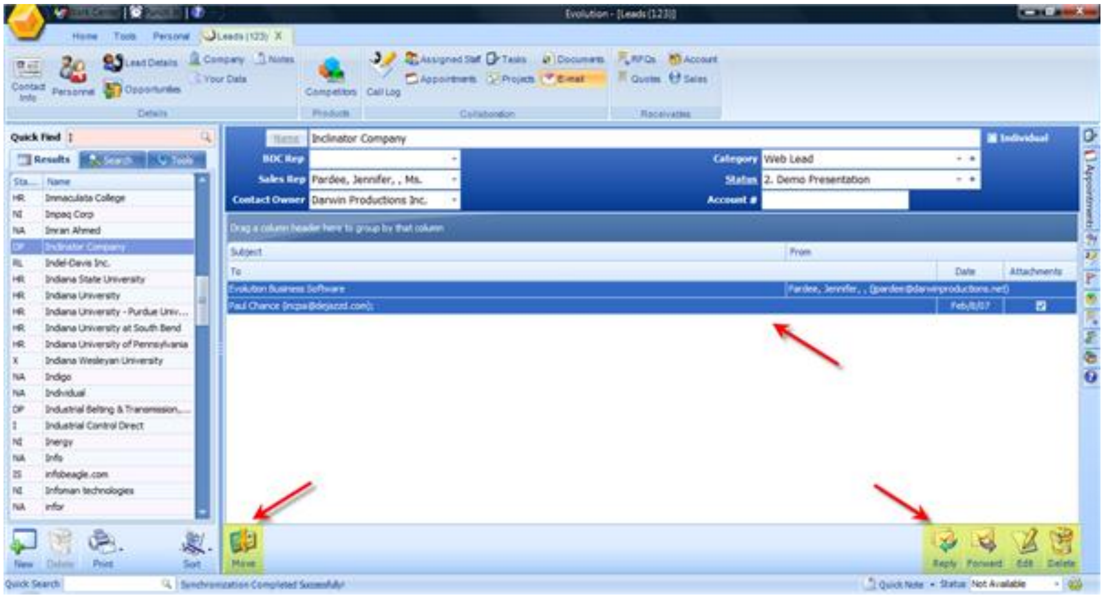
Each contact will have a Sales Rep field and a BDC Rep (Business Development Consultant) that can be assigned to each contact. Both fields are optional and open so you can assign each as necessary.

When multiple individuals work with a client you can keep track of them through the information on this screen.



Email

Each contact can hold emails within this section. Emails can be sent to a Contact, Project or folder from Tradepoint's Email client (More about this in the Email portion or the Product Manual).



When an email is imported into a contact is becomes part of the database so:

- Email will be compressed with the rest of the data at a 12:1 ratio
- Your emails are more secure than through an email client
- Based on your Security Settings you will be able to Reply, Forward, Edit or Delete existing Emails
- Emails can also be moved to another contact or location using the Move and Copy Tool
- Double clicking on a email will display the email in detail

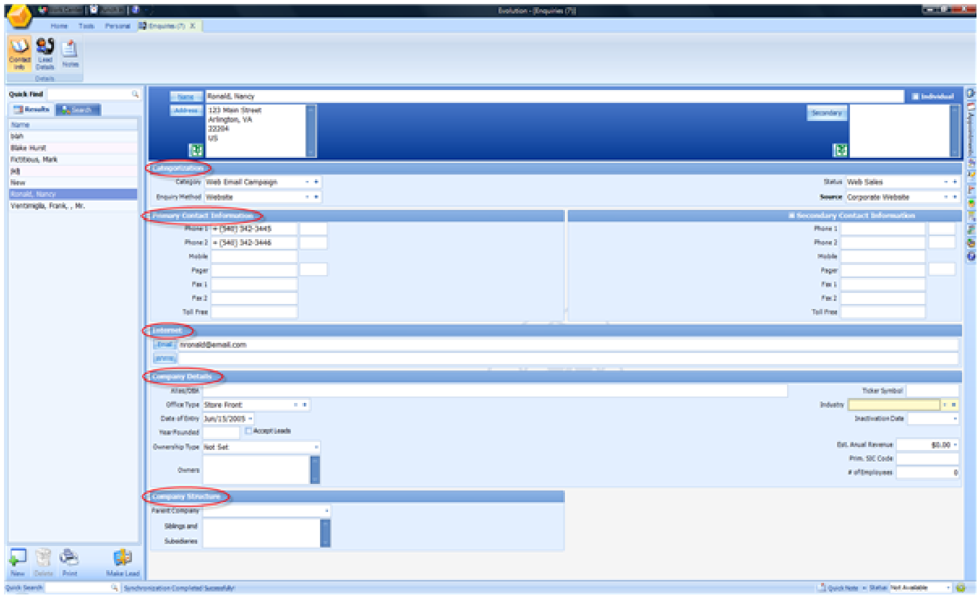
So, when you have your search results listed off to the left of your screen you will be able to click on each contact or use the arrow keys to scroll through the Emails within each contact.

Enquiries

Within Tradepoint Enquiries is designed to manage the different marketing efforts from any Sources that you use for outward marketing efforts.

Contact Info

The results of your Marketing efforts are Enquiries into your Products and Services. The Move and Copy Tool from Sources can parse out your Sources as you assign them to individual Sales Reps or to different contact types.

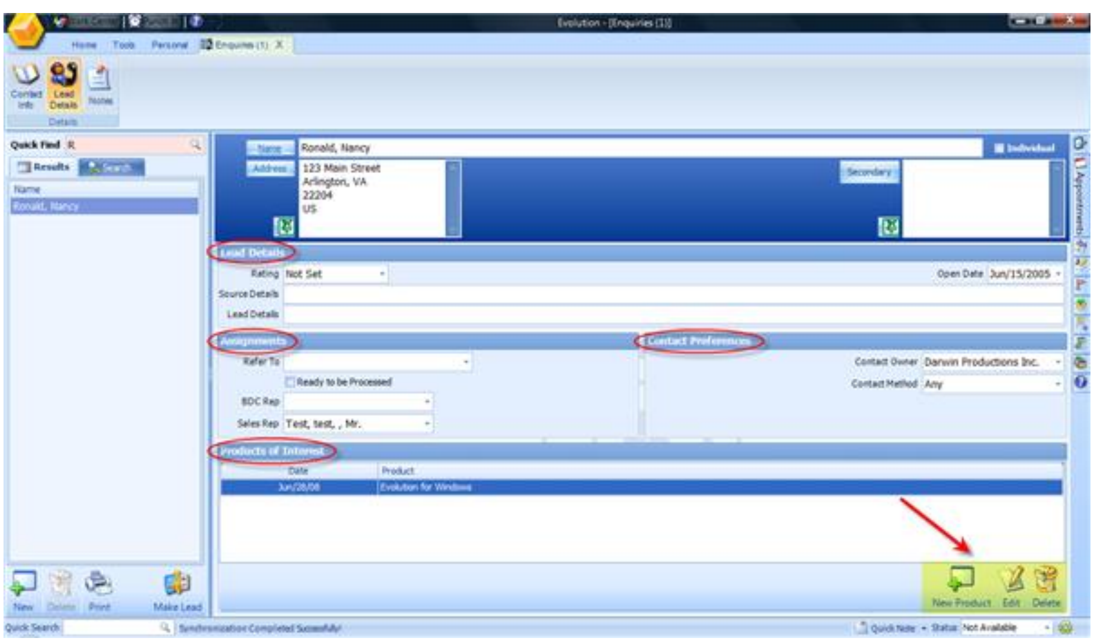


Information for your Enquiries is structured into the Following sections:

- Categories: Customizable fields (by the blue plus icon) to organize the results of your campaigns.
- Primary Contact Information: main contact information for your Enquiry
- Internet: email or website information
- Company Details: Any additional company information for your contact
- Company Structure: Parent or Subsidiary information for Business to Business Contacts

Lead Details

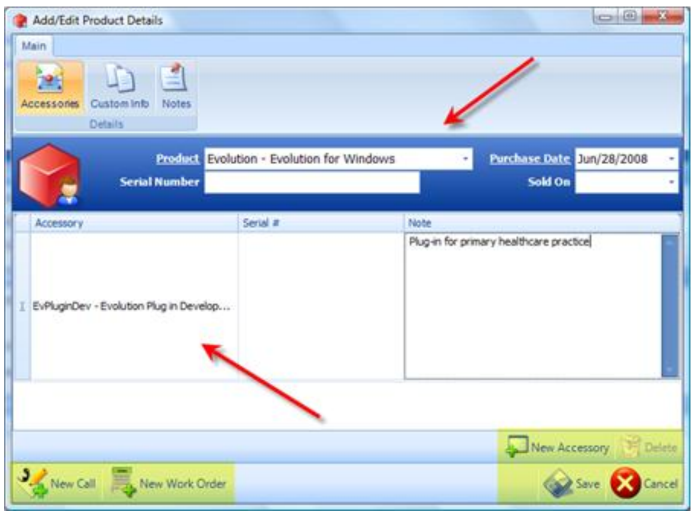
Further information about the results of marketing efforts is stored here.



Information can be entered manually or be set to automatically receive information through web forms or through a web page as enquiry results are generated.

- Lead Details: Include ratings, date information and any web page information for your Enquiry.
- Assignments: Any Sales or Support staff can be assigned through these fields. When Enquiries are moved into Leads or other contact sections in Tradepoint this information will follow.
- Contact Preferences: Store what Division (or website) and how an Enquiry wants to be contacted.
- Products of Interest: Any specific Products your Enquiry is interested in can be added here. This tool will also track as an Enquiry is moved to a different contact type and will follow into Call Logs and Tasks to track Products of Interest through your sales cycle with minimum clicks.

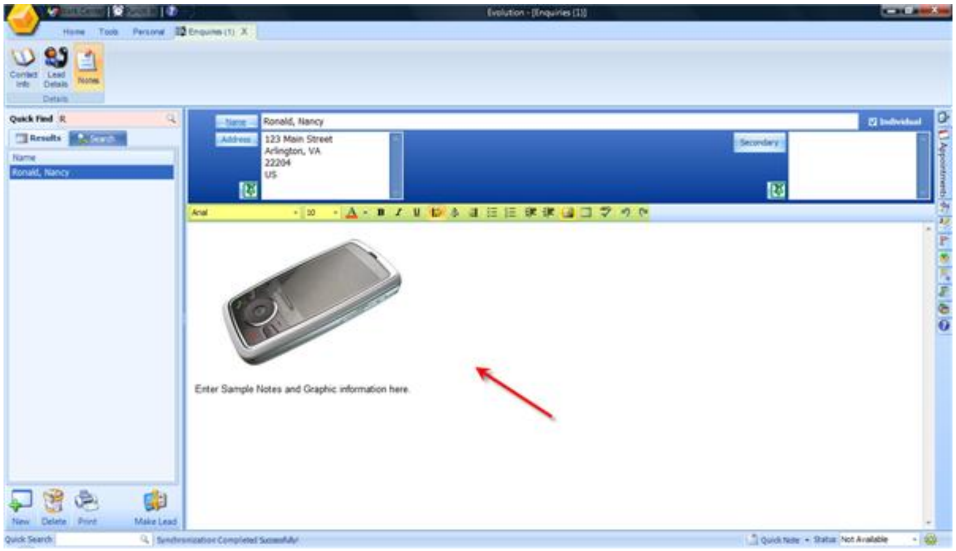
Adding a New Product of Interest will direct you to a new screen to add the details of the product, Notes and any relevant accessories as well.



Saving your Product Details will associate that information with that contact as it goes through your sales cycle without having to add that information multiple times.

Notes

Notes within Enquiries allows you to store graphic information as well as text.

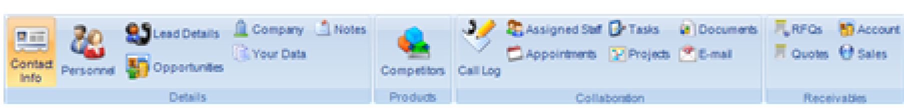


The highlighted tool bar allows you to bring in Images, create tables and format your text. This is an open field and a scroll bar will appear if you accumulate content.

Leads

Leads is a section for contacts that have expressed an interest but have not yet purchased any goods or services. This is reflected in the tool bar that contains all the tools within Sources plus the following:

- Appointments
- Tasks
- Projects
- Documents
- RFQs
- Quotes
- Account
- Sales

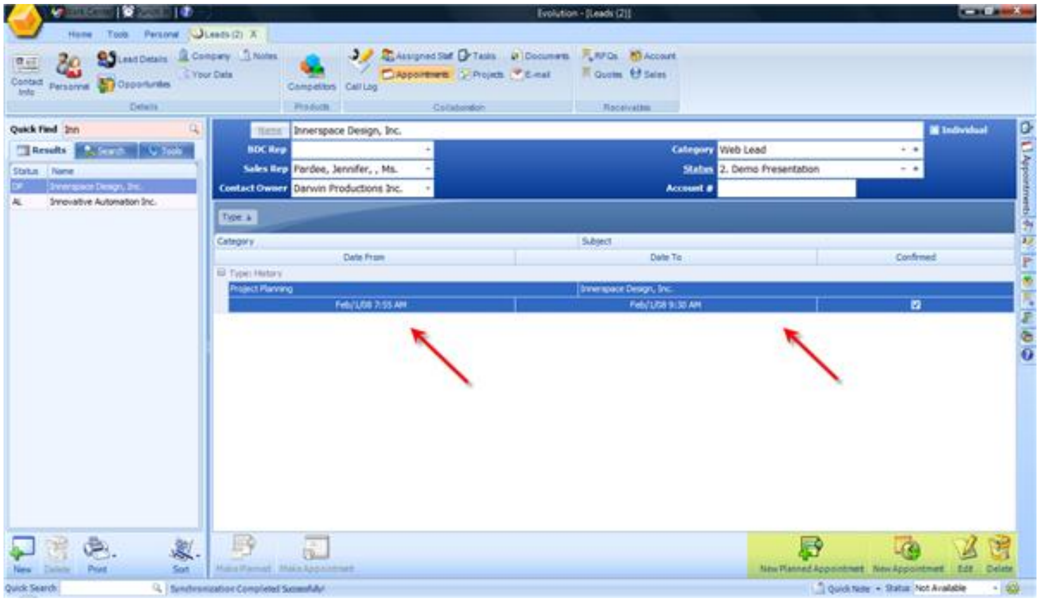


The tools described within Sources will also apply within Leads. The emphasis here will be on the new tools available for Lead management.

The Advanced Search Tool on the left contains several tools for Lead management including the search tool, the Mail Merge Tool and the Move and Copy tool for easy mobility of your contacts as they go through your sales cycle. The QuickReports, Sort Tool, and mapping options for contacts are also within leads in the Contact Info screen.

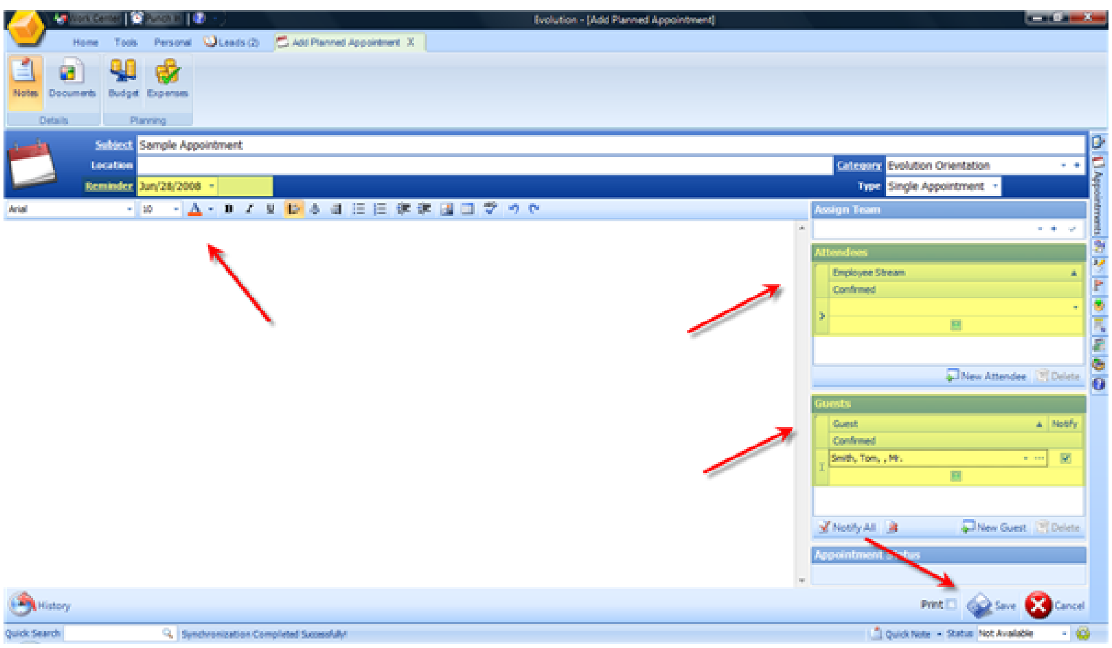
Appointments

Each type of contact will be able to store and create appointments for the contact in addition to the main Schedule. Any time a contact is added to an Appointment from the main schedule it will automatically track to the contact. Any Appointment history will be visible on the screen below.



Icons on the lower right are available for easy Appointment creation. Double clicking on any existing Appointment will open any listed Appointment.

Appointments can be either Planned or confirmed. Since so many Appointments are planned and then confirmed you have the option using the icons on the lower right.



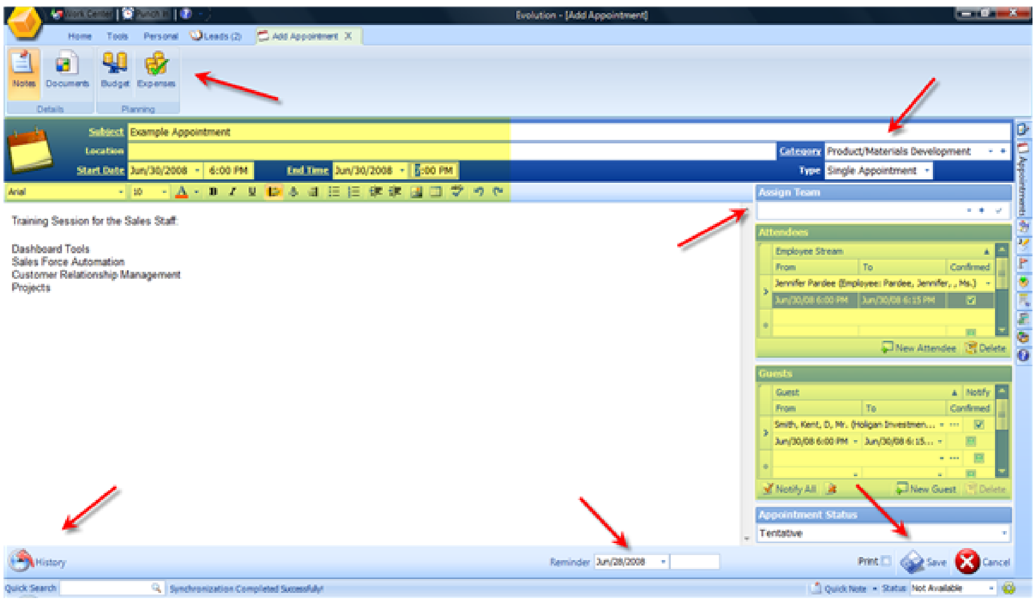
Appointment details can be entered or copied from another source

The distinction between the two is a Planned Appointment will need to have the status changed to confirmed from planned to show and be editable within the main schedule.

The view of the planned appointment screen will show only the date with one time field since it is a Planned Appointment. When the status is changed to Confirmed both the time and date fields will appear and you will have full editing capability for an Appointment.

Appointments that are confirmed from the onset include the time and date fields.

Appointments also include the ability to have Documents scanned, linked, or uploaded into a specific Appointment as well as Budget and Expense information. This information will be available to Employees that are attached to the Appointment and to any Guests (Contacts) who can login to your website through one of our Ecommerce solutions.

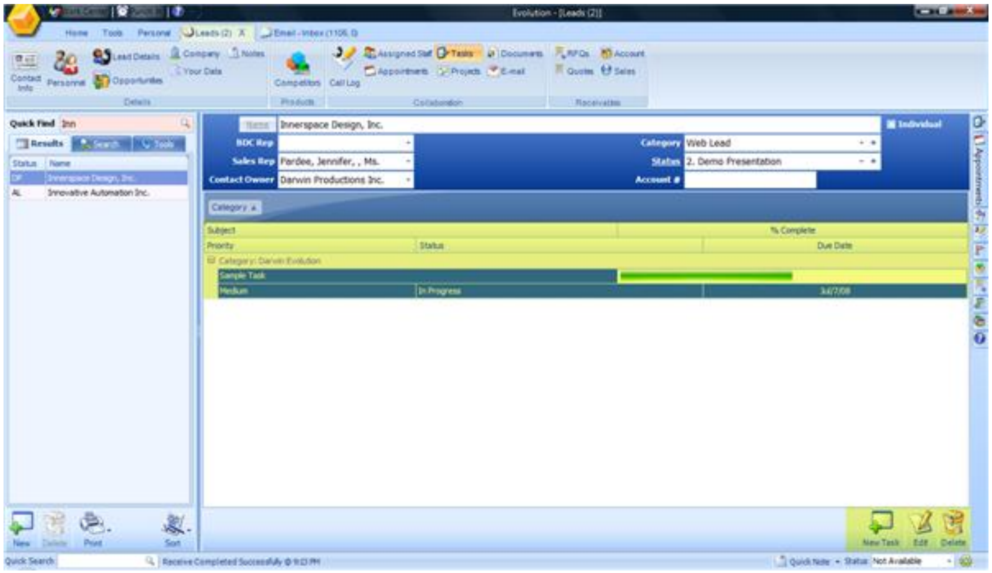


Additional tools available in the Appointments window include:

- Appointment Reminders: This will appear in all Attendees Flyout Panel
- Email Notifications: An email will be sent to any email address attached to any contacts that are attached to the Appointment
- Type: Recurring Appointments for daily, weekly, monthly, bi-monthly, semi-monthly, quarterly, twice a year, or annually.
- Assign a Team: If you use the Teams function you can assign a Team to an Appointment automatically using this feature.
- Print: Check off the 'Print' check box to print out the Appointment. *From the print preview screen you will be able to export it as one of a variety of file types or email it as a PDF directly from the Print Preview screen.*

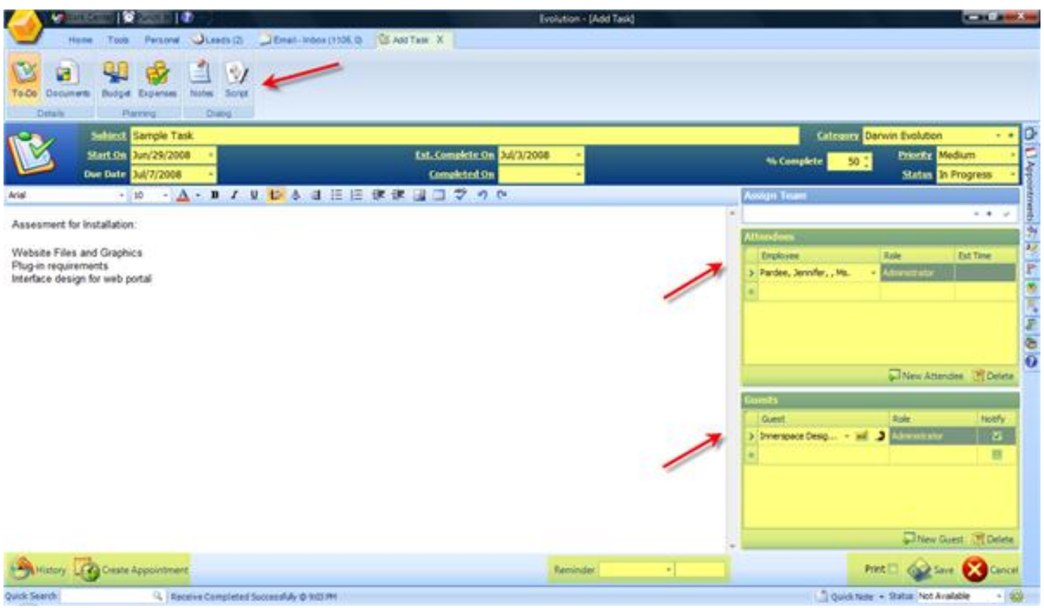
Tasks

Tasks can be independent or attached to a contact. In either case they will show up in your Flyout Panel as they come due and Reminders will also appear in your Flyout Panel as they come due.



Tasks will accumulate with each contact as they are created. Double clicking on any listed one will take you into the detailed screen to be edited or completed.

Tasks can be completed with a right click feature from the Flyout Panel for convenience. Any updates to a Task will automatically appear in a contact's file.

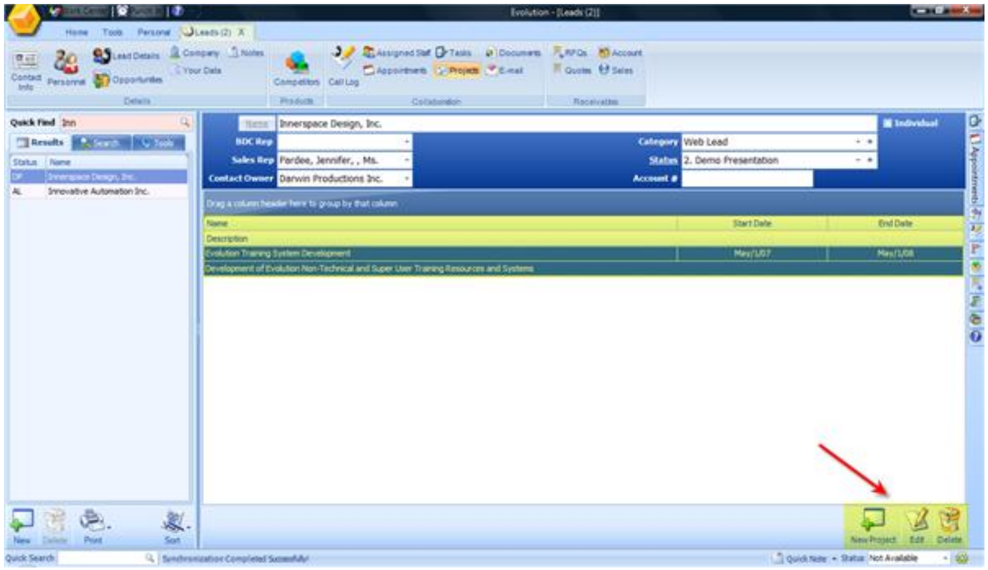


Similar to Appointments you have the ability to add Employees and Guests (contacts) to a Task as well as send notifications and set reminders.

Create an Appointment from an existing task and check the History (how many times and the details of any changes to an Appointment) of a task.

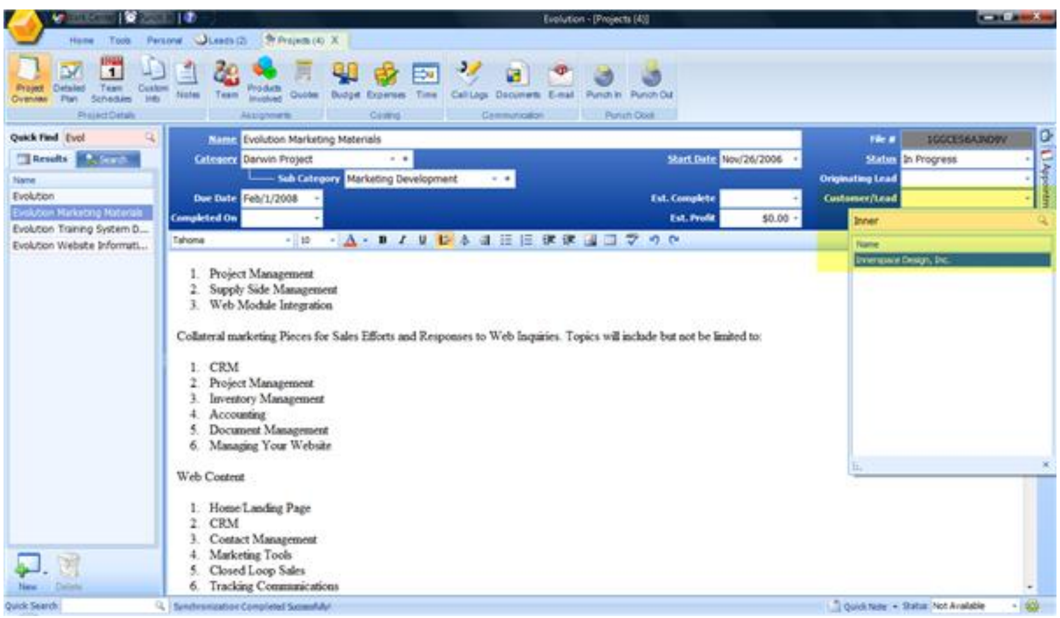
Projects

A Project can stand alone or be associated with a contact. This allows Projects to be tracked easily and also enables the Web Collaboration tools to share a Project with a contact through the web (more about this detail in the Web Tools section of the Manual).



Double clicking an existing Project will open that Project directly. Creating a New Project can also be done from a contact's account using the 'New Contact' icon in the lower right.

How a Project is associated with a contact is through adding that contact to the Project. Further functions available within projects will be addressed within the Projects chapter of the Product Manual.

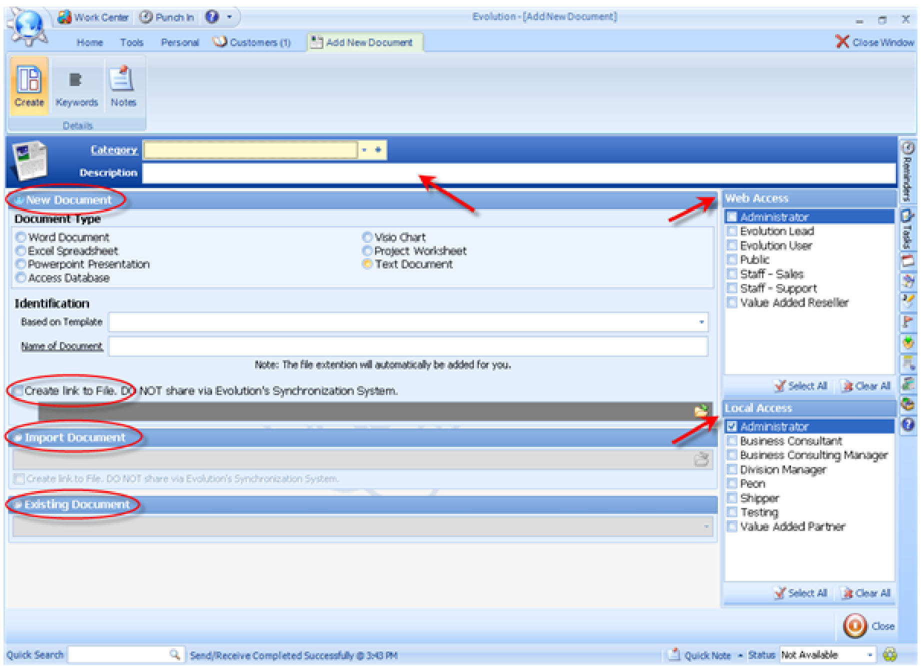


Documents

Clicking on the add new document icon 

in a contact, task, appointment, or Project will open the Add New Document window allows you to create a new blank document, create a document from a template, or import an existing document.

Within Tradepoint entering a document can be done in several ways through Tradepoint. The main screen to enter a document in is shown below.



Document categories are established at the top of the page. The blue plus button will open the Setup and Configuration tool enabling you to create detailed Categories.

Security Settings are available if you are using one of our Web Modules(labeled Web Access) and for the local application(labeled Local Access).

Tradepoint natively supports a large number of file formats for advanced functionality. For other document types you can import the documents and the system will automatically open and save them correctly into the database for you.

When creating a new document the file extension will be appended automatically for you. Also note that regardless of whether you are creating a new document or importing an existing one, it is advisable to enter a description and optionally a category in the bottom section of the window so you can easily locate the document once it has been saved into Tradepoint.

New Document

To create a new blank document, ensure that the New Document option is selected. Then select the type of document you would like to create and enter a filename in the Name of Document field (without the file extension). It is also advisable to enter a description and category. When this information has been entered, click the Save button and Tradepoint will launch the appropriate application with a new document.

When you save and close the document, Tradepoint will save the changes to the database.

Existing Document

To import a document from your computer, select the Existing Document option. Click the file folder icon to open a file browse window, and locate the document you wish to import. When you have selected the file, enter a description and category and click the Save button.

Document Web Access Settings

If you are using Tradepoint for Web, you can make these documents available online and control who can see which files simply by checking off the web access types that you wish to have access to the document. If you do not want the document to be available online, simply ensure that none of the check boxes are checked.

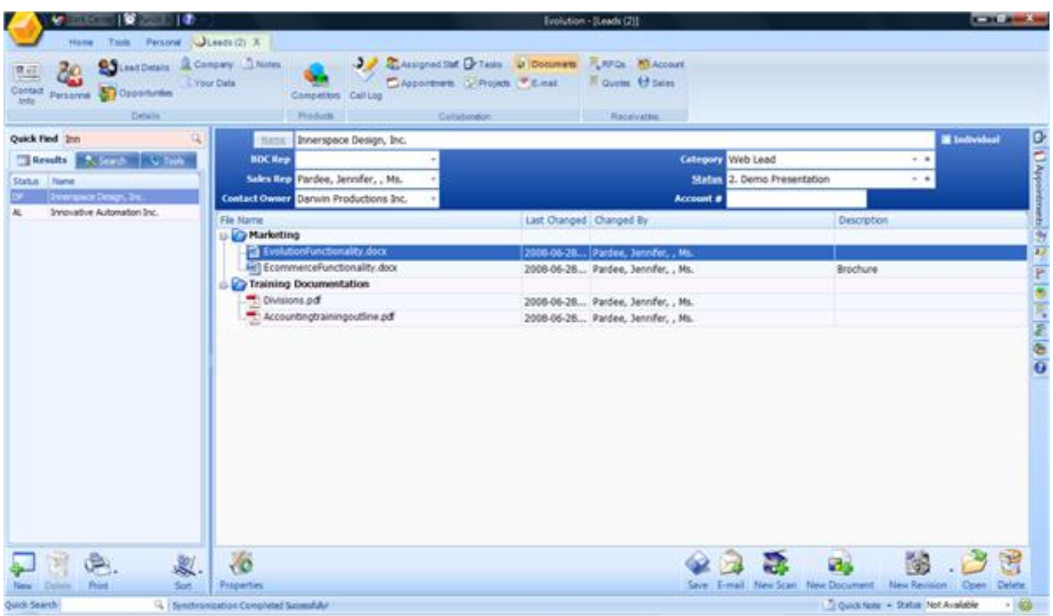
How Tradepoint maintains document files

Tradepoint opens documents automatically using the default application for whatever type of document you select to open. Once the document is opened, Tradepoint monitors the documents and waits for it to close. When the application that opened it is closed, Tradepoint will check to see if any changes were made and pull the updated document into the database.

While the system is monitoring the file that you have opened, you can freely open other documents, and use Tradepoint as you normally would. All monitoring happens in the background with no impact on you. If you have documents open when you close Tradepoint you will be prompted to save and close the documents before exiting Tradepoint to avoid loosing your changes.

Further Help Articles on each of these functions will walk you through each of these processes in detail.

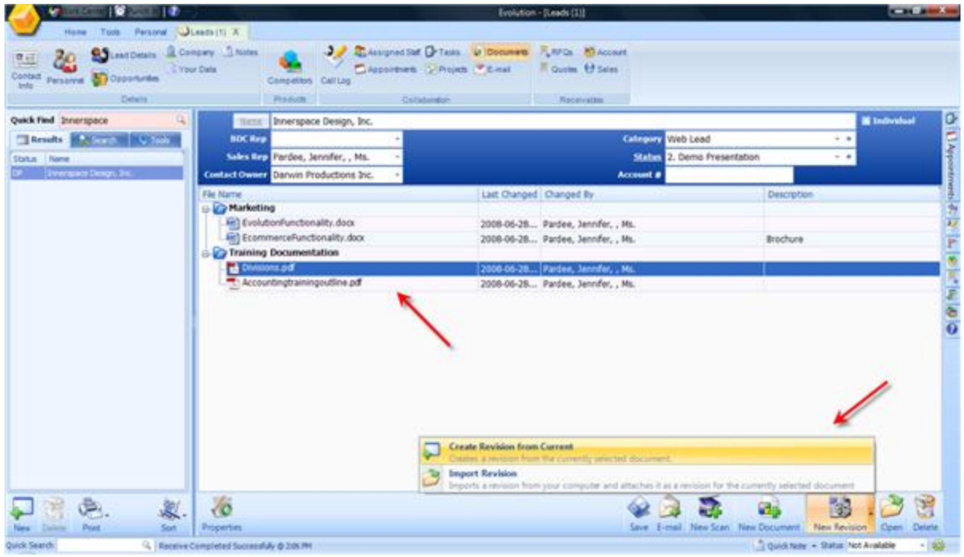
When documents have been entered into Tradepoint they will be structured by type within a given location in Tradepoint. Below is an example of a document structure attached to a contact (in this case a Customer) file.



These views will be consistent throughout Tradepoint when you open the documents whether it is through a Customer, Lead, Supplier, Project or attached to a Task or Appointment.

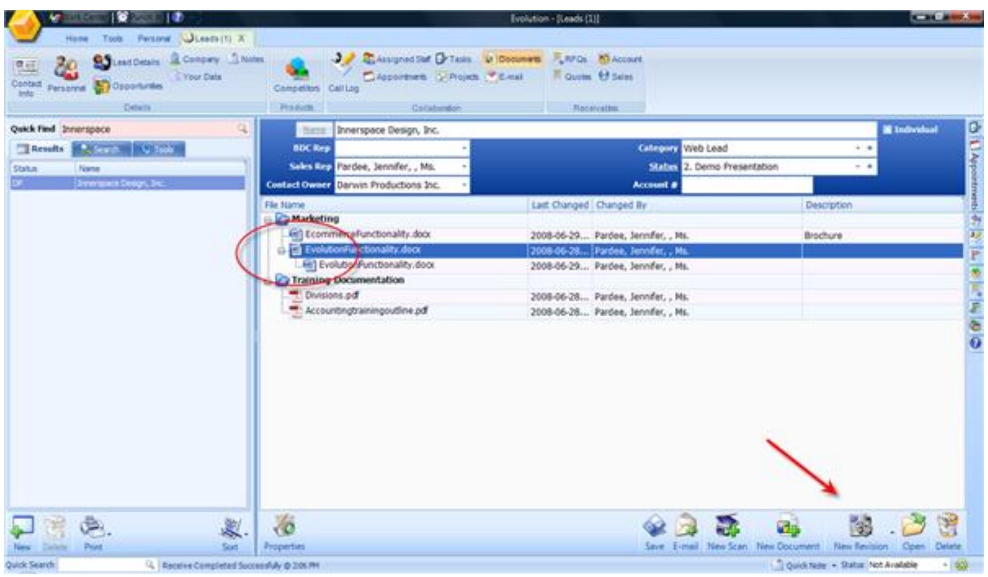
Document revisions are visible and tracked through this page with the User Access Settings of the individual. They will be listed in a stepped format in chronological order.

When a Document is highlighted the remaining icons will become live and you can then choose if you would like to open or create a revision from an Existing document.



When the 'Create Revision from Current' icon is chosen the highlighted document will open and you will be able to make the necessary changes to the specified document.

The Revised document will be attached to the original in a stacked format time and date stamped with the User Access Settings of the individual who made the changes. It will look like the circled area in the screen view below.



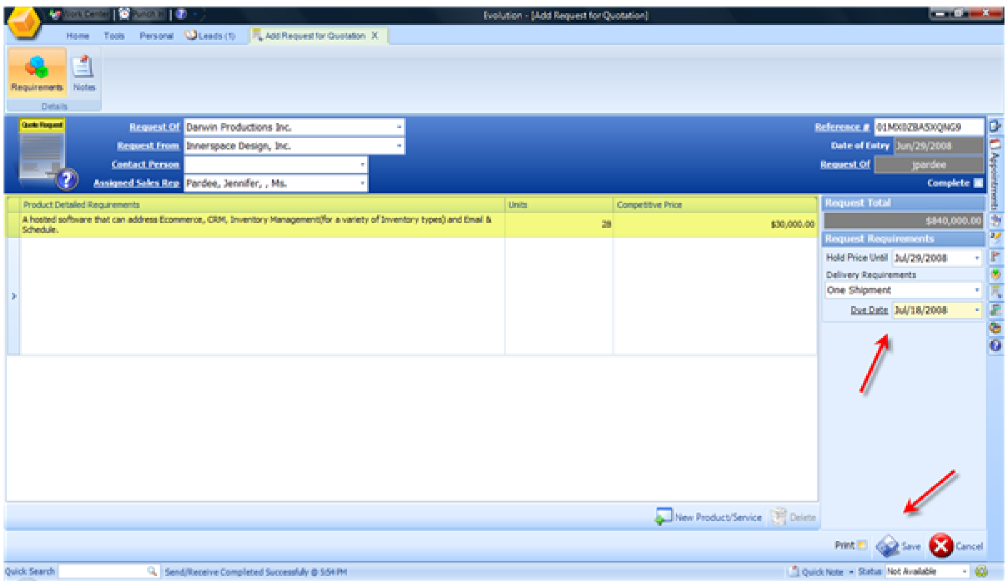
Since the use of Documents and shared files is so pervasive the document management functionality can be found in the following areas of Tradepoint:

- All CRM contact types and Suppliers
- Warehouses, Products
- Appointments, Tasks, Call Logs
- Orders, Invoices

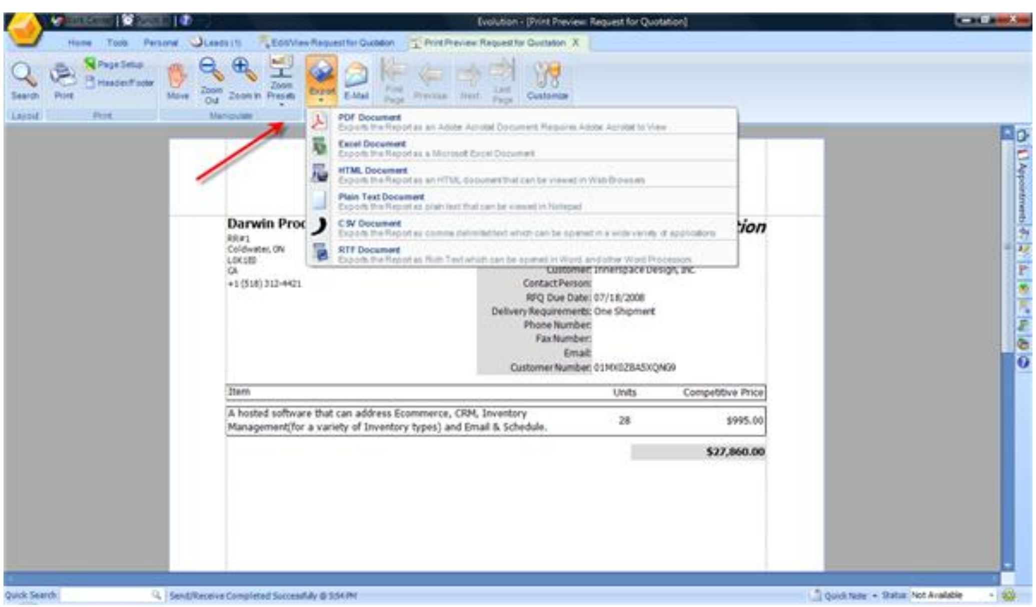
- Projects
- Knowledge Base Articles
- Press Releases

Request for Quotations or RFQs

A request for quotation is part of the receivables within the CRM component of Tradepoint. This allows your sales people to place a request for a quote with as much detailed information as necessary. The RFQ feature does not have any Accounting or direct product information so the fields are open (meaning you can type anything you need to in them) for easy data entry.



Enter in the details and specify the timeline for the RFQ. The users login information will be time stamped into the RFQ. Check the Print box and click the Save button to Save and Print out the RFQ.



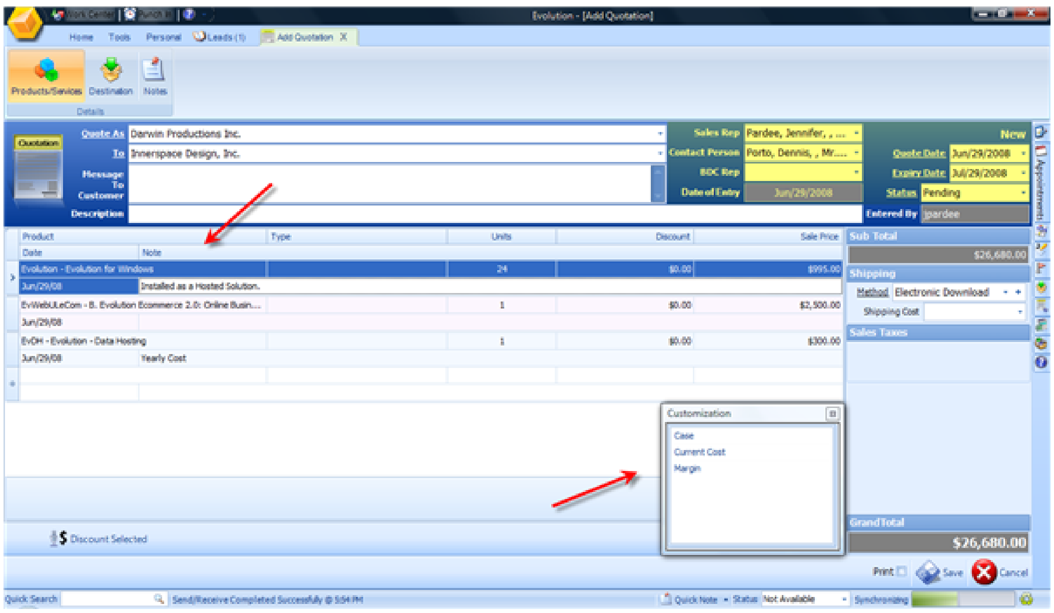
The Print preview screen for every screen includes a tool for easy export to multiple file types and the Email icon right next to the Export icon for easy emailing of any document as a PDF file. The Export feature will walk you through any additional steps necessary for each of the file types.

The Email icon will open the logged in users email account and attach the RFQ to the email. Simply add any additional message and the contacts to email it to and you are finished.

Quotes

A Quote is the next step after a RFQ or the first step in a sales process. The primary difference between a RFQ and a Quote is a Quote has Product and Pricing Information built into the Quote screen for accurate estimates.

The screen layout has the tools to click on fields to access tools and the Column Chooser to be able to arrange your screen to suit your preferences by right clicking on the light blue header fields.



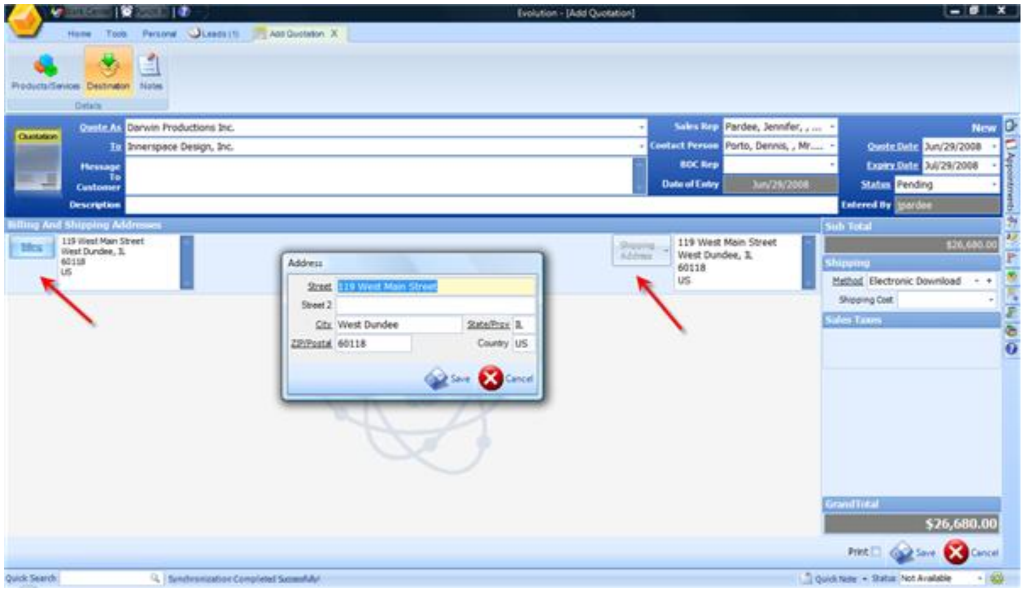
The sales rep information will appear in the upper right corner along with the dates that the Quote will be effective. When the products and quantity are chosen then the amounts will be calculated on each line item with the total appearing in the lower right.

Within a Quote you will also be able to:

- Associate a line item with a Case (this refers to a Project since you can generate Quotes directly form a Project) as shown in the Column Chooser. *This will not appear in the Printed Quote as a default item.*
- View the Cost of each item as well as the sale price (also referred to as the Retail Price or Retail Cost) within a Quote for each line item.
- View the profit margin for each line item (the overall profit margin will be shown at the bottom of the screen next to the Grand Total. *This will not be viewable within the Printed version of the Quote that you email or fax to your customers.*

The Save and Print feature is also available within Quotes for easy transmittal of your Quotes to your customers as shown in the lower right corner.

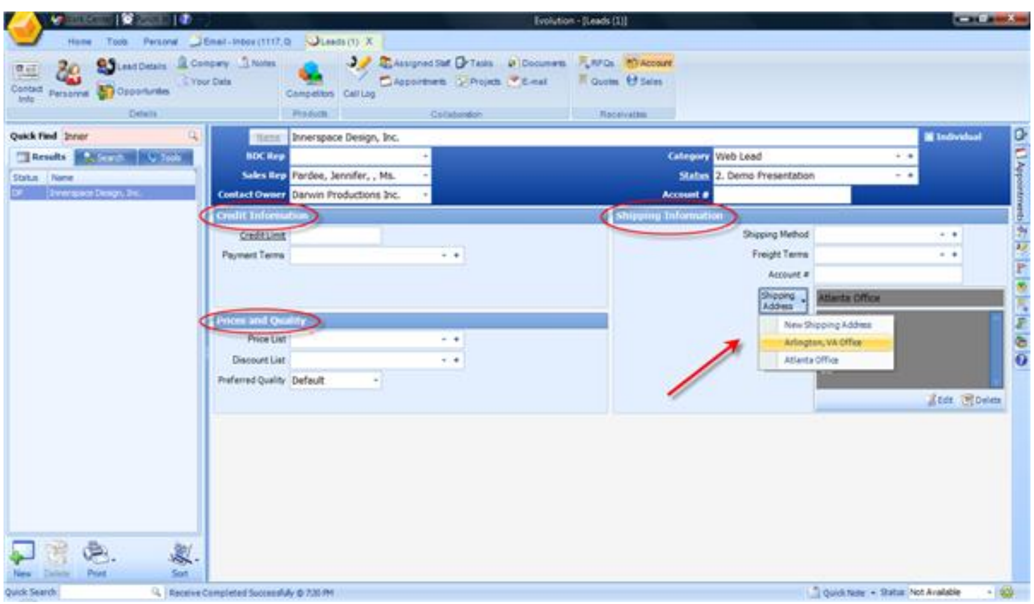
Each Quote will be listed on the main Quotes screen within a Lead, Customer, Reseller, or Supplier.



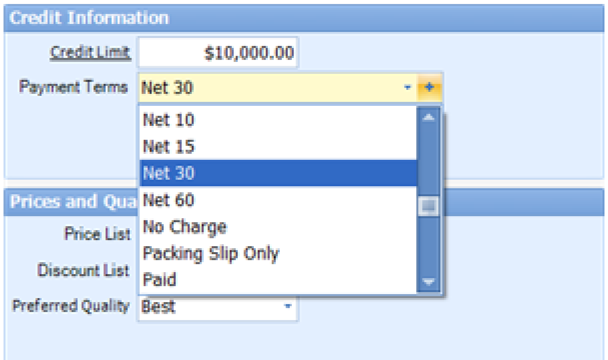
Note: *When Leads are moved into Customers, Resellers or Suppliers using the Move and Copy Tool, they will have full accounting functions available plus they will be able to add multiple shipping addresses through the Destination icon within a Quote.*

Account

The Account section within Tradepoint will hold Account based information that will show up in Quotes, Orders, and Invoices as they are produced.



A number of fields exist that can be customized with additional options through the setup and configure tool found in the blue plus icon next to each of the fields.



This example already has numerous Payment Terms built into this field and you can see the blue plus highlighted. Clicking on that will direct you to a screen to add options for the Payment Terms within Account Information in a contact.

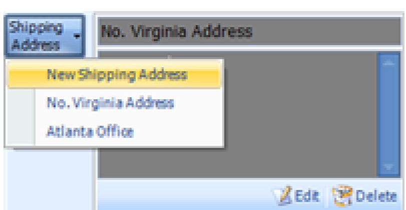
Credit Information - Keep credit information such credit limits and payment terms for your contacts here (if that applies to your company structure). Payment Terms are customizable through the blue plus icon at the right of the Payment Terms field.

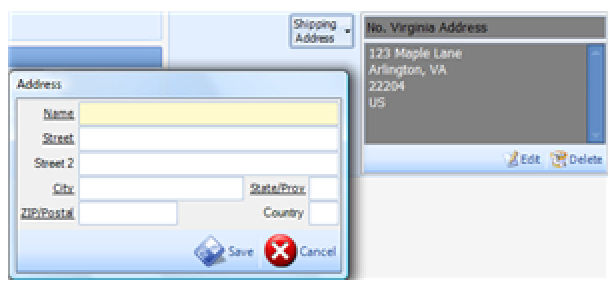
Prices & Quantity - Prices and Quantity is where you can have different pricing structures for your contacts act as defaults instead of the basic pricing structure you have entered as the default for your Products and Services.

For example, if you use Resellers for your Products and Services and they receive a 20% discount for their own use then setting the Price List will enable the Pricing structure within that list to be the defaults in any Orders, Invoices produced within those contacts.

Preferred Quality will generate a preference within and Purchase Orders Created when you either create a P.O. based on an order or generate P.O. based on Inventory Max/Min levels you have set in each of your Products under Suppliers.

Shipping Information - This section will hold and allow you to create multiple shipping addresses. Each address entered here will also show up within Quotes, Orders and Invoices. The drop down menu opens a widow for you to enter in a new shipping address. Choosing New Address will open the following window. Save your new address when finished.



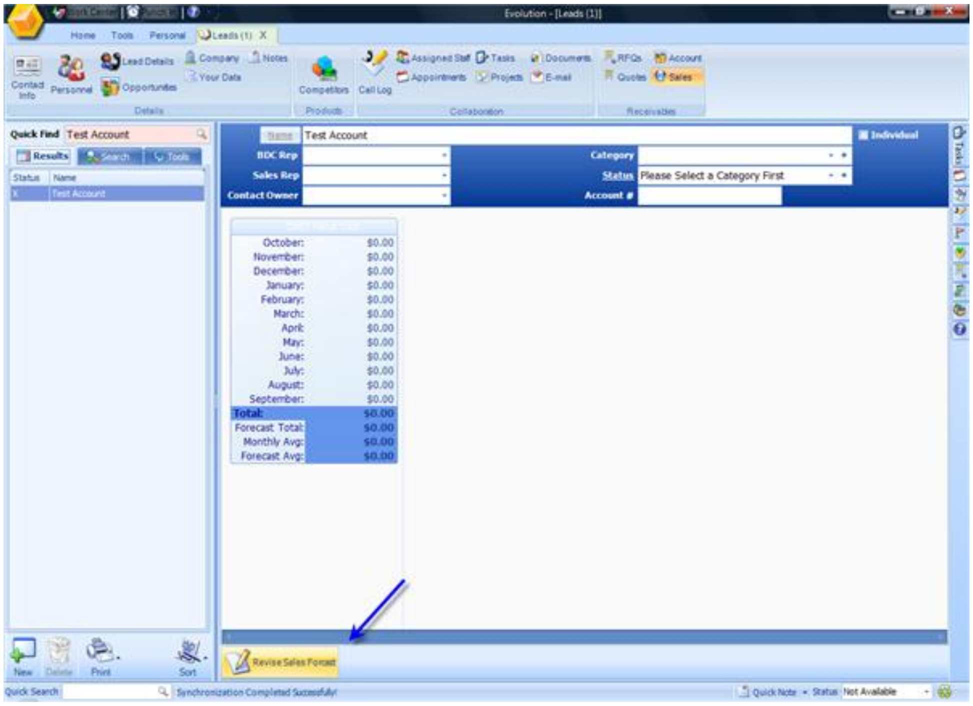


Please Note: Any additional shipping addresses can also be created within each of those documents that will push the information to this section for each of your contacts to avoid duplicity of data entry.

This means that you also have the ability of adding shipping information for multiple locations within your Quotes, Orders and Invoices and the new addresses will push to this section of a contact from the Quote, Order or Invoice being created.

Sales

Each of your contacts will also have a section for sales information. Within Leads the Sales section will appear as you see below with the ability to add a Sales forecast through the icon highlighted at the bottom of the screen in the view below.



The Sales section will store any forecasts you enter in and as Sales happen within the Customer (after you have moved the Lead into Customers the data you created will show in the correct fiscal year as shown in the example below.

	2007 Fiscal Year		2006 Fiscal Year		2005 Fiscal Year
October:	$0.00	October:	$4,402.58	October:	$0.00
November:	$0.00	November:	$0.00	November:	$3,324.97
December:	$0.00	December:	$4,304.60	December:	$0.00
January:	$0.00	January:	$0.00	January:	$1,500.00
February:	$0.00	February:	$0.00	February:	$1,806.50
March:	$0.00	March:	$0.00	March:	$4,575.00
April:	$0.00	April:	$0.00	April:	$0.00
May:	$0.00	May:	$0.00	May:	$750.00
June:	$0.00	June:	$0.00	June:	$0.00
July:	$0.00	July:	$0.00	July:	$0.00
August:	$0.00	August:	$0.00	August:	$0.00
September:	$0.00	September:	$0.00	September:	$750.00
Total:	$0.00	Total:	$8,707.18	Total:	$12,706.47
Forecast Total:	$0.00	Forecast Total:	$0.00	Forecast Total:	$0.00
Monthly Avg:	$0.00	Monthly Avg:	$725.60	Monthly Avg:	$1,058.87
Forecast Avg:	$0.00	Forecast Avg:	$0.00	Forecast Avg:	$0.00

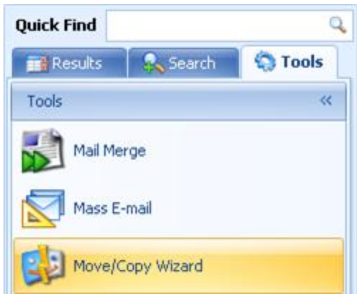
This is an example of a customer that was acquired in the 2005 fiscal year that has had activity every year up to the 2007 fiscal year. If you have recurring costs for Products and services on a yearly or monthly basis then the activity will track to the respective year and month when the transaction is completed.

Moving Leads to Customers

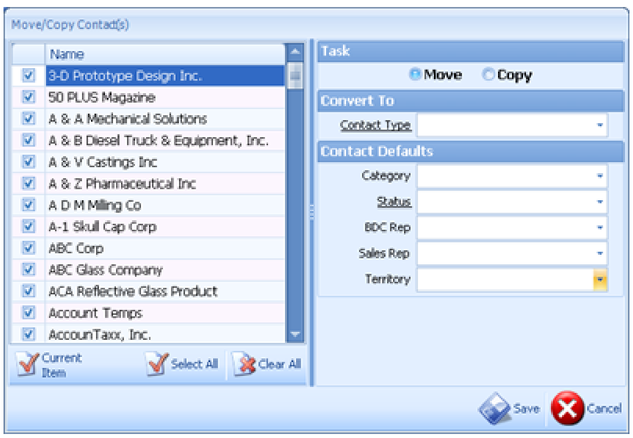
Moving Leads to Customers is done through the Move and Copy Tool found under the Tools tabs in the Advanced Search tool.

This provides the flexibility to change the type of contact when and how you need to. Contacts can be moved from Leads to Customers, resellers and other contact types easily and even assigned to specific sales people from the Move and Copy tool.

From the Tools Tab select the highlighted option for Move and Copy Tool.



From there a smaller inset window will open with a number of options available. You will have the option of editing your search criteria and then selecting the type of Contact and related information that will be associated with the contacts you have selected.



The options for editing your search criteria are on the left and the options to either Move or Copy the contact to another contact type within Tradepoint are on the right. You will also have the options to select the Category, Status, BDC Rep, Sales Rep and Territory for your contacts.

The Move and Copy Tool is embedded in each contact section throughout Tradepoint for flexibility with all contact types.

Customers

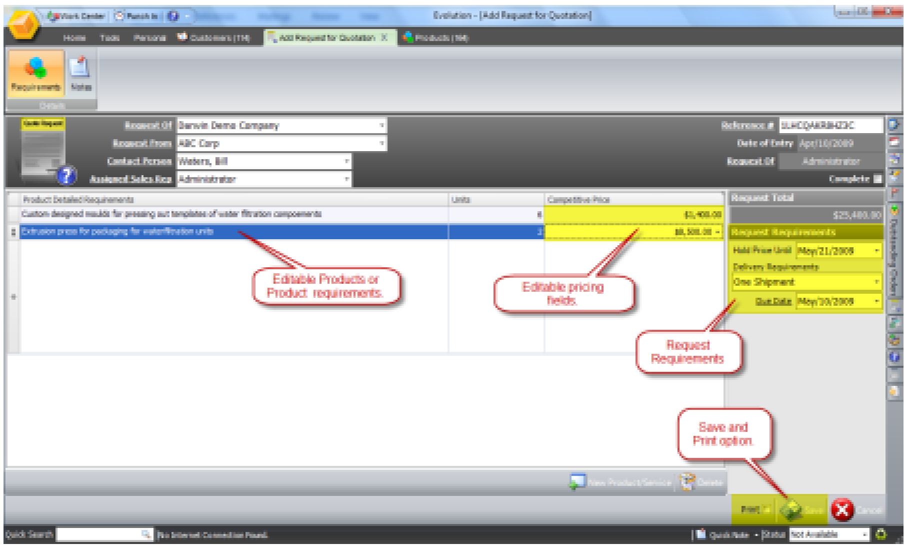
We have addressed each functionality tool within Leads that you will also find within Customers. We will be covering the additional sections for Receivable and Payables to round out this portion of the Instructions Manual. Going into the contact based accounting portion of Tradepoint's CRM will also address numerous accounting and security features tied to this functionality group within Tradepoint.

Additional Notes will be throughout these sections of Tradepoint explaining how the accounting process works while you are processing, fulfilling and Invoicing for orders.

RFQ's

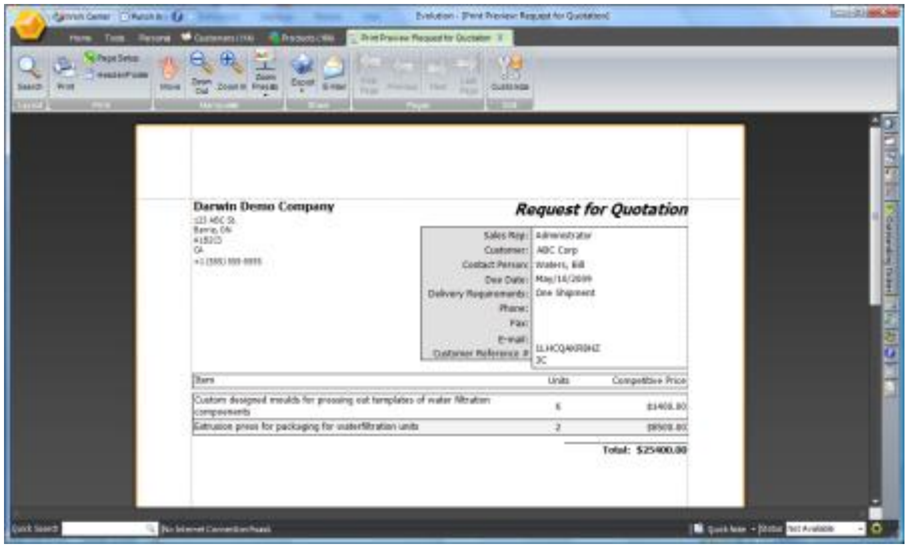
RFQ's or, a Request for Quotation is a tool designed to respond to a custom Quote request. Needs for a RFQ will vary depending on industry however, Tradepoint allows an RFQ to be created tailored very closely to a client request with an open pricing tool and the ability to email as a PDF or Save the RFQ as one of the following file types: RTF(Word), PDF, Excel, HTML, Plain Text, CSV(Comma Separated value).

The RFQ interface is shown below. Products and pricing information DO NOT pull from your existing Inventory therefore any information can be entered into those fields.

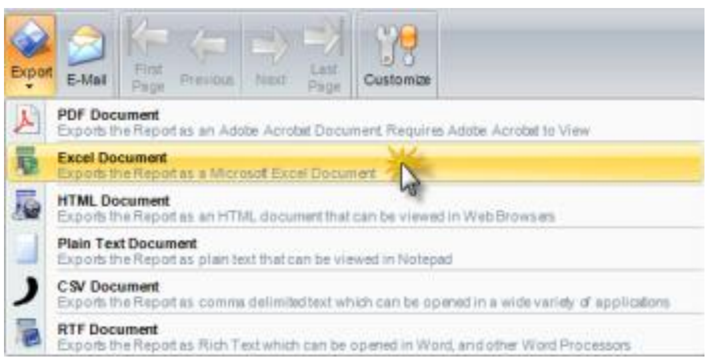


Clicking the Save and Print will open the Print preview screen with the options to either print , export to a different file type or email as a PDF.

The print preview screen for RFQs will start with a default template as shown in the image below:

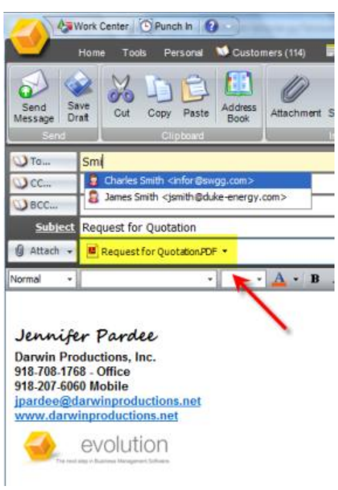


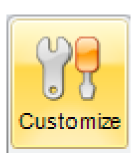
Main options include File Export:

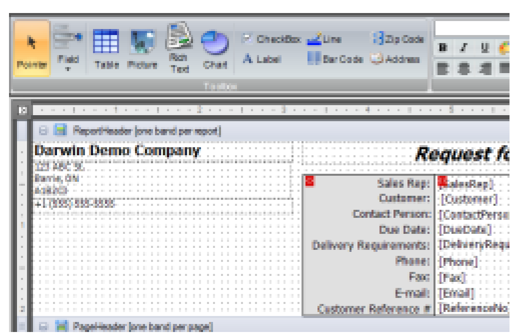


Email as a PDF:

And the Customize option to modify the RFQ template:



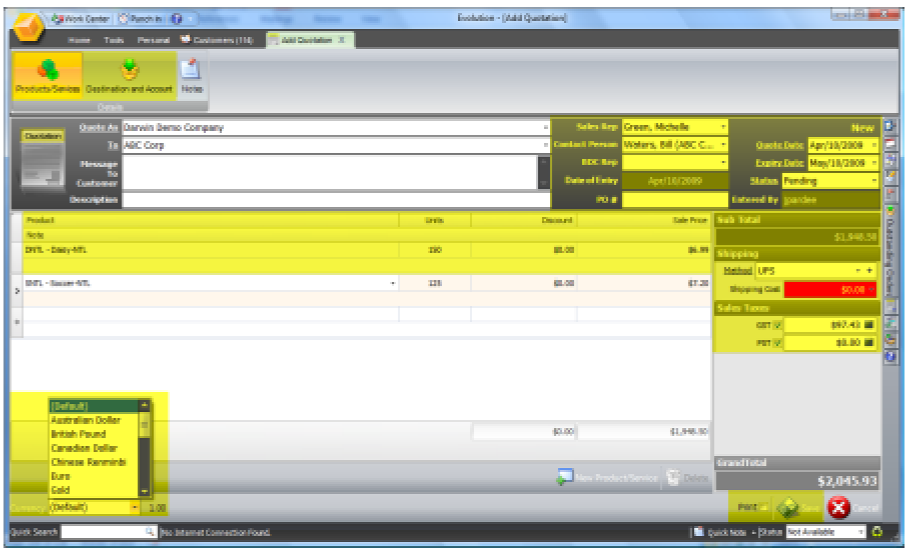




Quotes

Quotes will draw from any existing Products already within Tradepoint. The Quotes screen allows as many products as necessary with multiple options including:

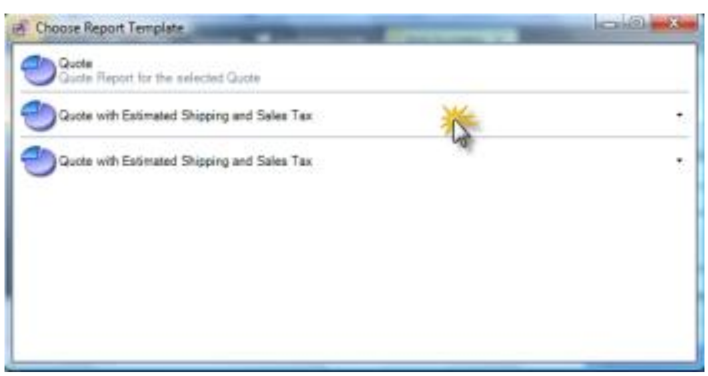
- The ability to edit pricing
- The ability to add a Product discount by percentage or amount
- Create a Quote in multiple currencies (Quotes DO NOT post to the General Ledger)
- Add a date range the Quote is valid for
- Add a Shipping Option with any anticipated shipping costs
- The Save As file type option
- Email as a PDF option from the print preview screen
- Add an alternate shipping address
- Calculate any sales taxes(based on country and postal code information)



Quotes are dynamic so any changes made to an existing Quote from this main screen will show any changes within the Print Preview screen. This makes updating a Quote easier through a sales process.

Multiple templates can be saved within Quotes for easy access once the Print/Save option has been chosen.

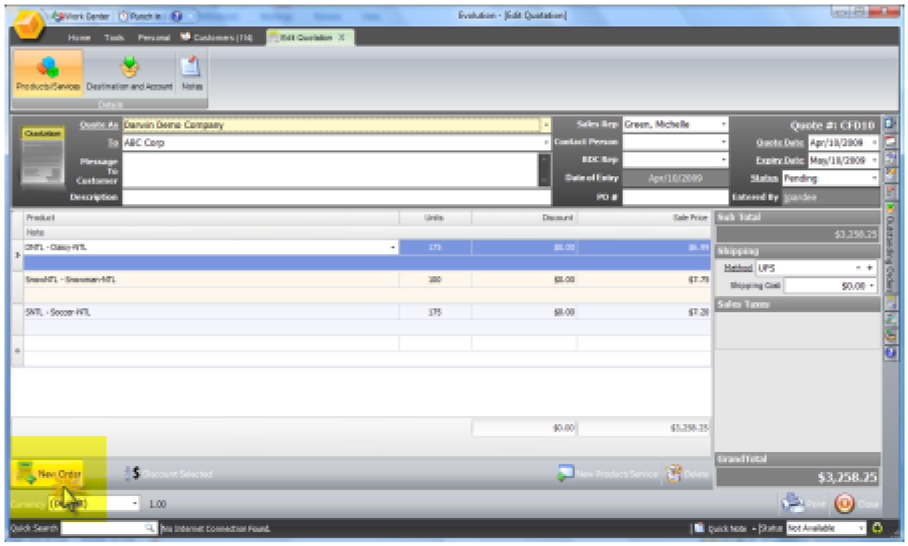
If multiple Quote templates are chosen, a prompt will pop-up when a Quote is Saved with the Print option.



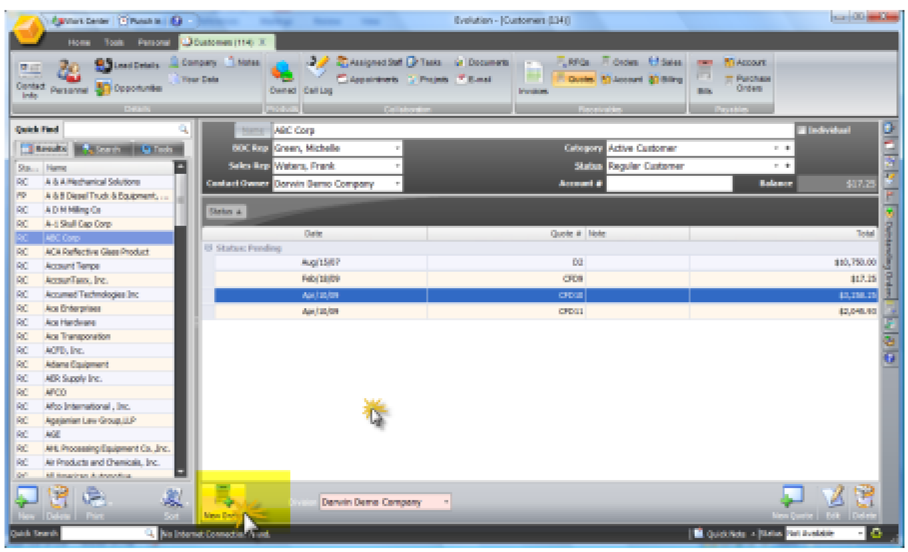
From Quotes to Orders

Quotes have a one-click option to turn a Quote into an Order easily. This can happen from 2 locations within Tradepoint.

1. From within an existing Quote. Note the highlighted option for a one click option to turn the Quote into an Order.



2. From the main Quotes screen, highlight a Quote and click the New Order icon highlighted in the lower left.



Once a Quote has been turned into an Order then adjusting the status to 'In Production' and saving the Order will direct into the fulfillment process for shipping or prompt for the Purchase Orders to be generated for any drop shipping needs.

Web Orders

Web Orders are Orders processed from a website that will show up in Tradepoint automatically after an order has been placed and payment has been processed through the website.

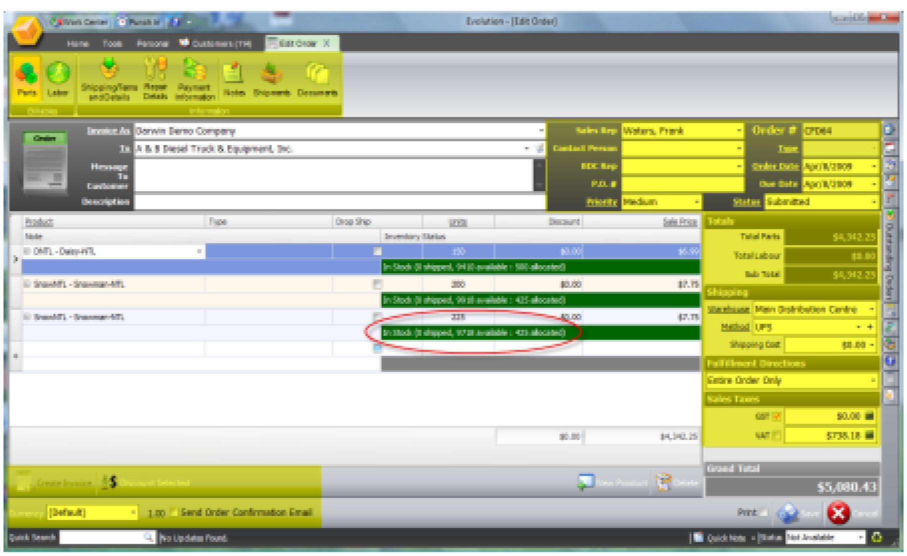
Web Orders can either be fulfilled directly or they can be drop shipped. Either way they will be pre-populated within Tradepoint and be visible through the contact that the Order was created under, through the ***Sales Report***(found in My Business and which is dynamic for click-throughs to a specific Order), or through the ***Flyout Panel*** providing reminders for all Orders with different statuses.

Key points within the website shopping cart will determine how Web orders are processed within Tradepoint.

1. Payment gateways with account preferences often determine of a payment is processed immediately upon completing a Web order or at the item an order is shipped.
2. For the second option, if the account is verified for the available balance to cover the order and then payment is deferred until that Order is actually shipped preferences will prompt events within Tradepoint each step of the Order process. Payment is actually processed on the account at the time the Order is shipped with this option.
3. Most payment gateways support both of these options.

When Orders are processed through the web, individuals with the option set in their profile to receive reminders about new Web Orders will receive those Orders through the Flyout Panel.

Below is an example of a directly fulfilled order with areas highlighted for detailed options and preferences. In the case of Web Orders, any preferences from the web order will already be entered in and the Status will be either ‘Credit Cleared’ or ‘In Production’.



The most convenient way to handle Order fulfillment is through the Flyout Panel with the option to fulfill an Order through the 'Fulfill Order' icon or through the main Orders screen within a contact.

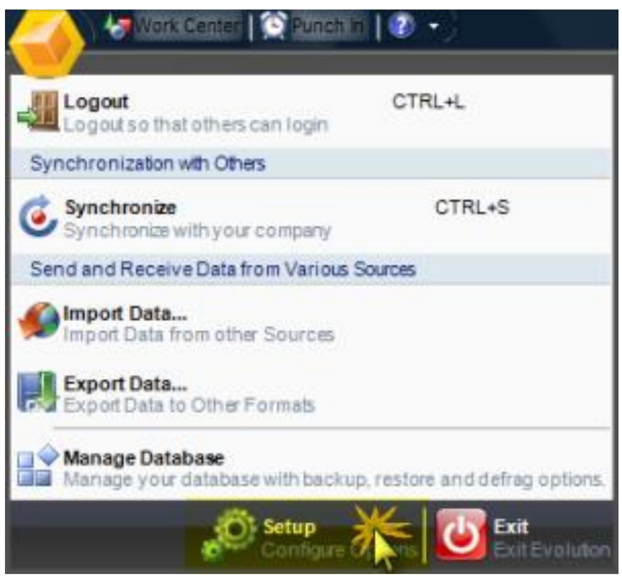
Payment Gateway Setup for Web Orders

A Payment Gateway is a service through which Web Orders can be processed. Payment gateways are not the same as merchant services though some merchant service providers do also provide payment gateways for processing Web Orders.

Payment gateways currently supported by Tradepoint include:

- Authorize.net
- Skipjack Financial Services
- Beanstream AIM
- Moneris eSelectPlus-Direct
- Protix Direct
- Google Checkout
- Paypal Pro
- LinkPoint Connect

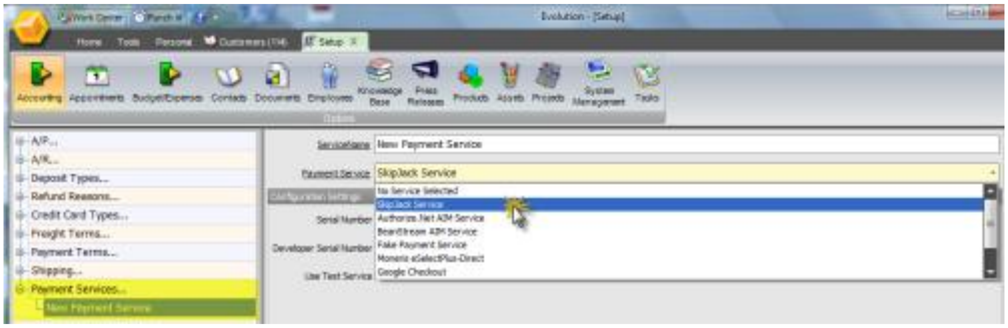
Payment gateway Setup happens through the Setup & Configure tool found in the Management Menu.

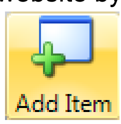


The next screen will bring up a series of options for items that can be customized throughout Tradepoint. The tool bar of icons across the top of the screen shows the sections within Tradepoint where various customizations can be made.

The expandable menu on the left of the screen lists specific areas within each section of Tradepoint to customize detailed areas.

For setting up payment gateways we will be looking at the 'Payment Services' section of Accounting.



Setup the payment gateway for a website by clicking the payment services field once and by clicking the Add Item icon to create a new payment Service. 

A list of the currently supported payment gateways will be in a drop down menu. With each service a different series of fields will pre-populate to complete the setup for the payment gateway. The fields for Google checkout will be different from Authorize.net, etc.

Fill in the fields with the necessary account information for the payment gateway and test out the service by going through the shopping cart on the website. A payment gateway will also support orders processed directly within Tradepoint as well.

Shipping Account Setup Integration for Web Orders

Setting up Shipping Accounts for use on a website and directly within Tradepoint can involve several steps.

1. The first step is to make sure your shipping account has been setup with permissions to process web orders through your carrier. This may mean a phone call to UPS, FedEx, etc. to make sure your account has that requirement supported through the carrier.
2. Next setup the shipping account within Tradepoint.

Shipping accounts are supported by both a Shipping Method and a Shipping Service.

A Shipping Method can stand on its own to provide manual shipping options with approximated shipping rates based on billing tables created within a Shipping Method.

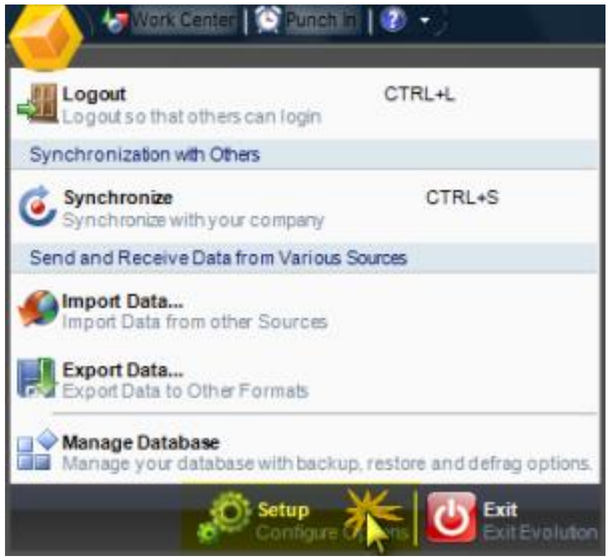
The second use for a Shipping Method is to be linked to a Shipping Service with the ability to add specific preferences to the Shipping Service on each Order including:

- Billing Tables based on weights to enable approximated shipping rates should an Internet connection be lost
- An increased for handling to be built into the shipping rate
- A ceiling price for shipping costs enabling free shipping on Orders over a certain dollar amount
- Specific Shipping Service types (Overnight, 2nd Day Air, Ground, etc.)

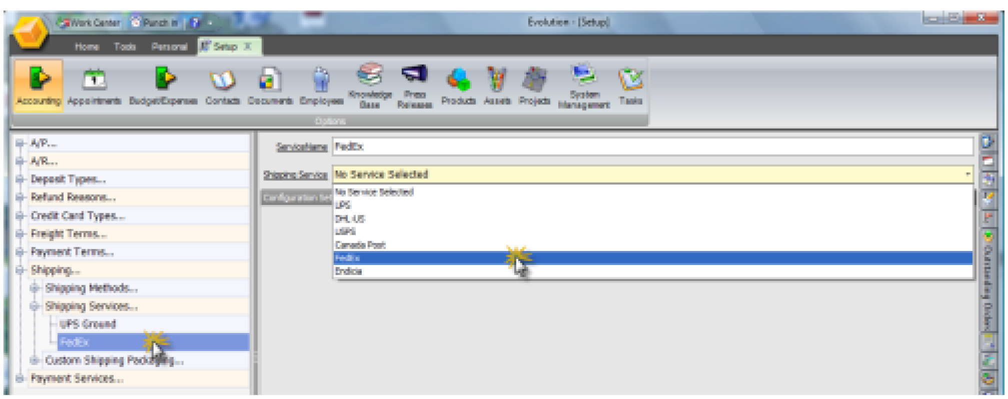
The most common setup is to have one Shipping Service setup in Tradepoint for each carrier which will communicate electronically with that carrier and multiple Shipping Methods setup in Tradepoint for the various types of Shipping Services supported on a website.

Setting up a Shipping Service is done through the following steps.

Access the Setup & Configure tool through the management menu.



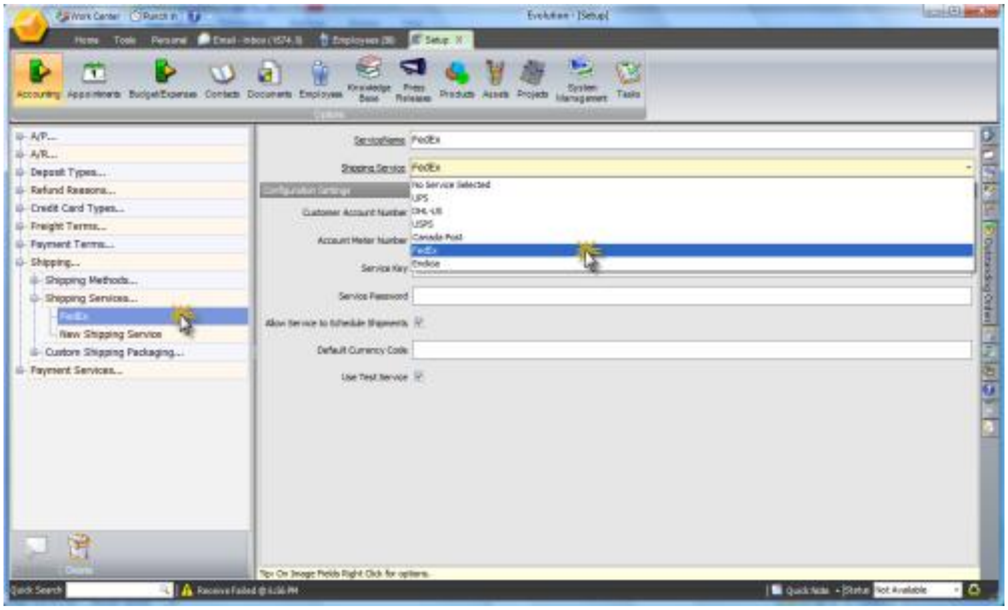
The first screen which will appear is the main screen with expandable menus listed on the left. Choose the Shipping Service options and then the 'Add Item' icon to create a new Shipping Service.



The next screen will show what information regarding the Shipping Service is relevant. This means the field for FedEx will be different from the UPS information and so on.

The current Shipping Service supported in Tradepoint will be listed in a drop down menu. They include:

- FedEx
- UPS
- DHL-US
- Canada Post
- Endicia
- USPS (Rate Enquiries Only)



Check off the necessary testing boxes to process tests with your shipping services before you go live to ensure that all relevant details are operating accurately through Tradepoint and on a website.

When the Shipping Service has been tested thoroughly then un-check the Shipping Services options in Tradepoint to use your Shipping Services live.

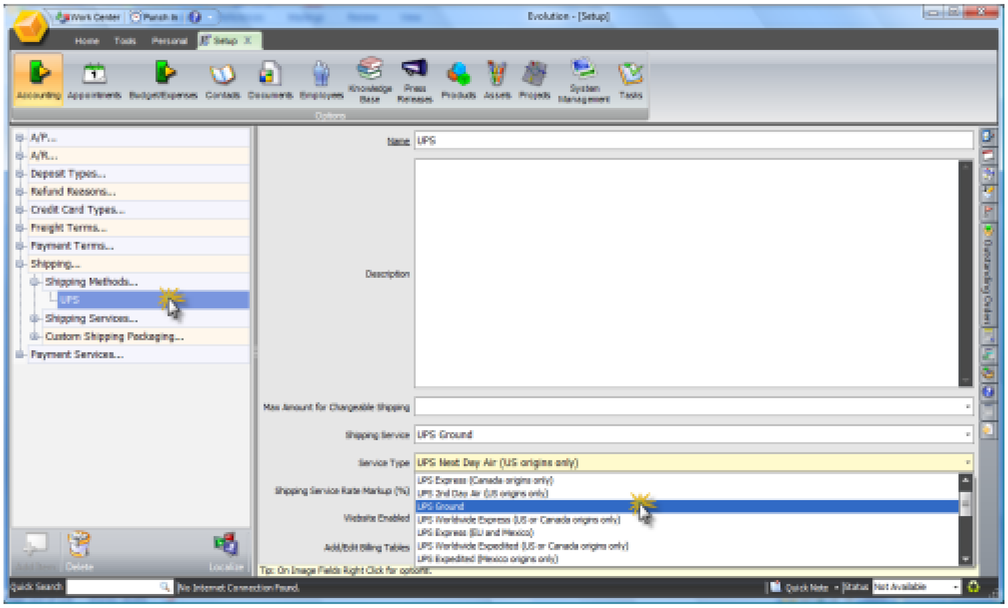
Associating a Shipping Service with a Shipping Method

The difference between a Shipping Service and a Shipping Method is while only a few shipping services will be necessary, many Shipping Methods may exist depending on the services you provide to your customers through commercial carriers.

This means if through the FedEx Shipping Service you provide Overnight, 2nd day Service and Ground shipping options for a website there will be only one Shipping Service for FedEx but 3 Shipping methods for each of those Shipping methods provided by FedEx. The same applies to each commercial carrier used.

The Shipping Methods established will be visible on the Orders and Invoices window through a drop down menu for processing directly through Tradepoint.

Any Shipping Methods that have been web enabled (check box option found in the Setup & Configure tool for Shipping Methods and Services) will also appear on your website within a drop down box in the shopping cart.



For each Shipping Method setup attaching the right Shipping Service is done after the Shipping Service is setup. Each Shipping Service setup will be accessible through a drop down menu within each Shipping method setup.

Once the Shipping Services have been setup and linked to the corresponding Shipping Methods your shipping is ready for certification.

Commercial Shipping Certification

Shipping certification is a process required by the main commercial shippers as a means to establish a path of communication between a website and a specific shipping account to ensure security for each commercial shipping account used through a website.

Please Note - Any commercial shipping account has to be enabled for website use before the shipping service can be certified. This has to be established with the commercial shipper. If an account is not enabled for web usage then an error will be generated when an attempt is made to certify the Shipping Service through Tradepoint.

Tradepoint has a built in certification process for UPS, FedEx, and Endicia (3rd party provider for USPS) built into the interface making it easy to complete the first part of the shipping certification process.

Once the necessary Shipping Services and Shipping Methods have been setup according to your account information then the Shipping Certification tools can be accessed through the Tools Tab.

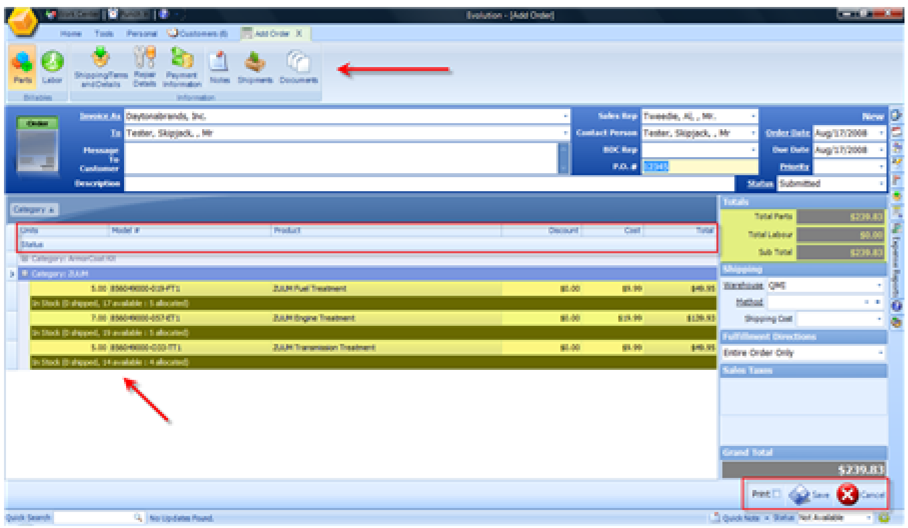
Each of the main shippers has a slightly different process for Shipping Certification. Each of the certification processes is guided through using a wizard with complete instructions necessary for each shipper.

Simply click on each icon for each service being certified and follow the steps outlined. Each one of these will have documents to send to the commercial shipper at the end of the process. Most shippers tale 3-5 business days however, occasionally can take longer once the certification process has been completed in Tradepoint.

Direct Orders

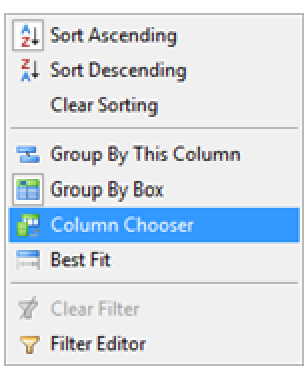
Within the customer section Orders has numerous features and two basic views for your products. *For companies using any of our Ecommerce solutions Orders is where you will see any web orders appear within each Customer file after they have been processed on the web.*

For companies that have a few products (being about 50 or less) the list view is ideal to be able to view all your products with the ability to Tab through each field to enter in quantities and information about your products for Orders. Below is an example of the List view.



The ability to customize how your fields are displayed is available through drag and drop options by hovering your mouse over any one of the light blue fields and dragging it to a different location in the header field at the top of the Order screen. Should the field you are dragging disappear then it has been placed in the column chooser. Access the Column Chooser by right clicking on the header field and choosing the column chooser option.

Additional options are available for sorting and grouping. If you click on any option and the appearance of your Order screen gets confusing simply close the Order and then re-open it to reset the appearance defaults.

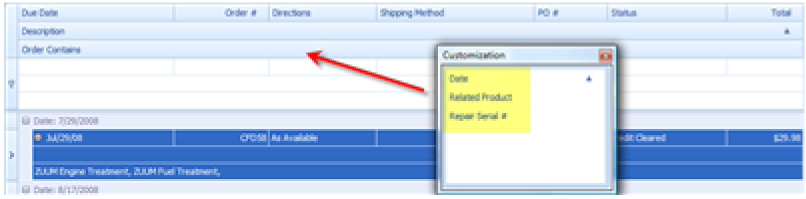


Your column chooser options can be seen in the example to the left.

Once you choose on the Column Chooser Option for Orders the remaining existing fields will appear for you to drag and drop within your Order.

Simply click on and drag any other option from the Column Chooser where you want that field to appear in your Order. If there is already information within those fields then will pre-populate as you arrange your fields.

Column Choosers are available throughout Tradepoint and they all function the same way. Your changes will be remembered as you make them. Should your changes not be remembered with the Column Choosers them please make sure you have received all of your Windows updates as this will affect that function.



The available items for an Order are listed out so you may easily tab through the fields to enter in data to process an order over the phone. Additional options shown at the top of the screen with the icons include:

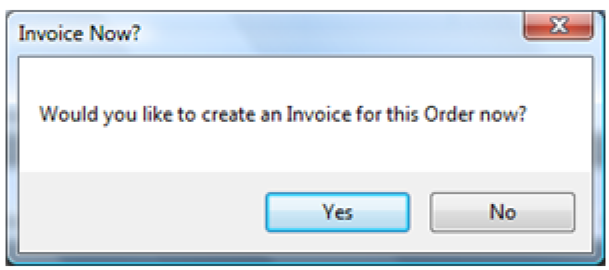
- Multiple shipping addresses
- Repair or warranty work options
- Payment processing
- History of shipments
- Documents you may need to attach to an Order

Clicking on any of those tabs will direct you to that screen for additional information about the order you see above.

The right hand side of the screen will show your subtotals, shipping options, fulfillment directions, any applicable sales taxes for each Order. A Status option at the top will show the status of an Order as it is created.

Most web based orders will default to a 'Complete' status when the orders are processed online. Once an order status changes from 'Submitted' to 'Complete' then you can be prompted to create an Invoice directly from that Order.

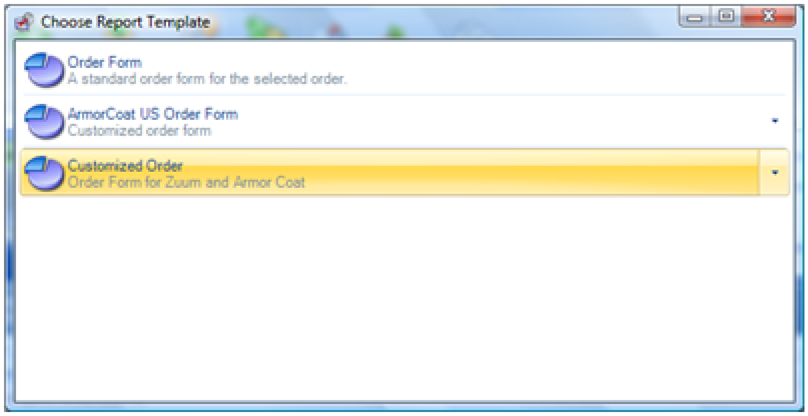
If you have set your options to prompt you to create an Invoice from a completed Order within the Company Settings then you will see this prompt when and Order is manually completed within Tradepoint.



Clicking 'Yes' will bring up the Invoice screen immediately and clicking 'No' will bypass this option.

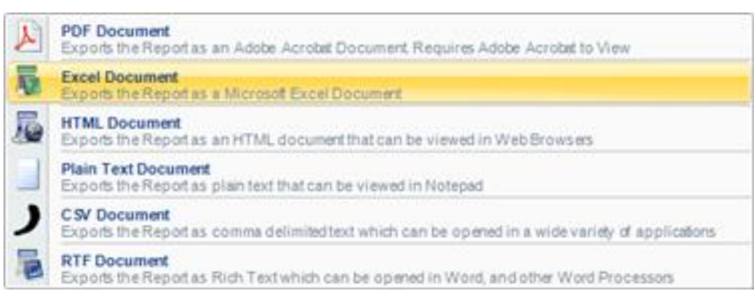
A print option is shown as a check box at the bottom of the screen. When this is checked off then you will be able to directly print off or email or export your Order in a number of file formats directly from the print preview screen.

In the example Order shown above there is more than one Order form that has been created so you will be directed to this option to be able to pick out the Order form necessary for this Order.



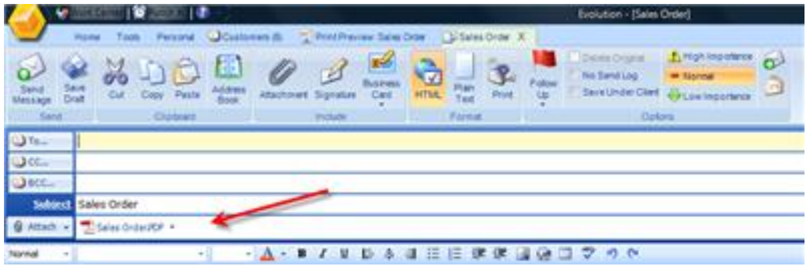
If there is only one form within an Order (the same will apply to Quotes, RFQs, Invoices, POs, and Packing Slips) then this screen will NOT pop up to prompt you for a choice of which form.

Your Print Preview has the standard print preview options plus the Export and Email function at the top of your screen. The export feature provides several options for file formats that you can export this order in.



Each of the export options will prompt you with options for saving and opening the Order as the file type is created. Not all file types have the same prompts so each file type will have a slightly different prompt.

The email option from the Print Preview screen will automatically generate an email from your profile. If you only have one email address set up under your Employee profile it will generate the email from that default email address.



The image above shows the email options from the Send Email screen.

The form file type is defaulted to a PDF file type. You can check off the 'Save under Client' option to save a record of this email to a client file automatically when this email is sent.

The Accounting defaults set up within your Company settings will automatically track the activity for Orders (and Invoices as well) as they happen so there is no need to general entries or entries per product in to a specific G/L account. Reporting tools and General Ledger functions for searching on specific items will allow you to generate various reports for different types of Accounting activity for your business as you process sales.

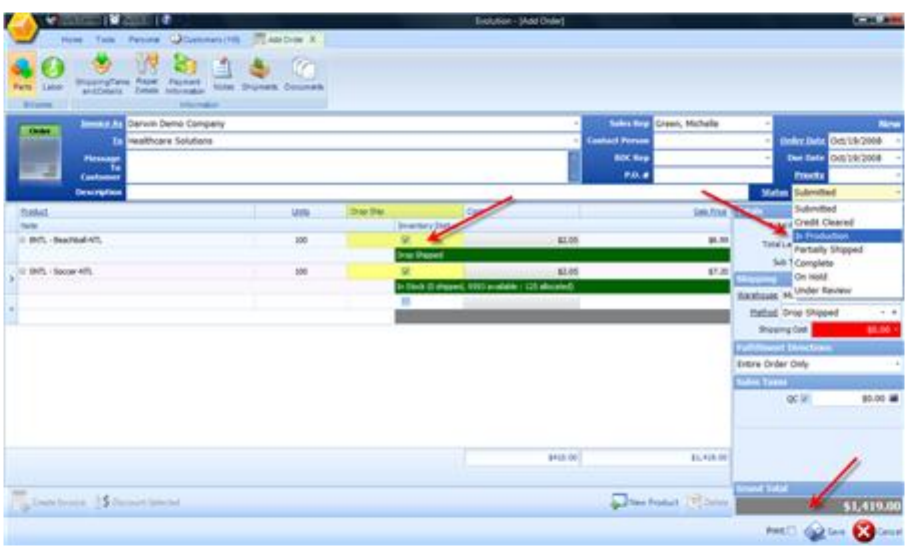
Order Processing for Drop Shipping

Processing a drop shipped Order can be handled in a few steps per Order.

<u>Note:</u> If you are using an Ecommerce solution note that web Orders will still be pushed into Tradepoint through your website. The corresponding Purchase Orders will have to be authorized with the auto-generate PO tool through each Order that comes in through the web.

From an Order screen to use the automatic PO tool use these steps.

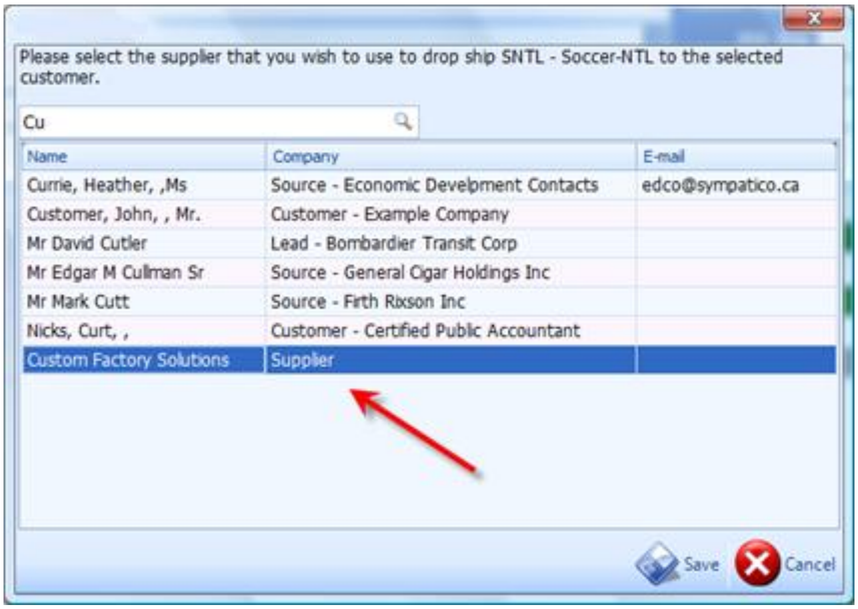
1. Check off the Drop Shipped box to enable the auto-generate Purchase Option.
2. Choose 'In Production' from the drop down Status option.
3. Save the Order.
4. Check off the Print option for an order (if desired).



Even if your Products are set to be Inventoried Items you can over ride that option for each item in a given Order. ***For items that are set to be non-inventoried and drop shipped this will NOT be an option within Orders.***

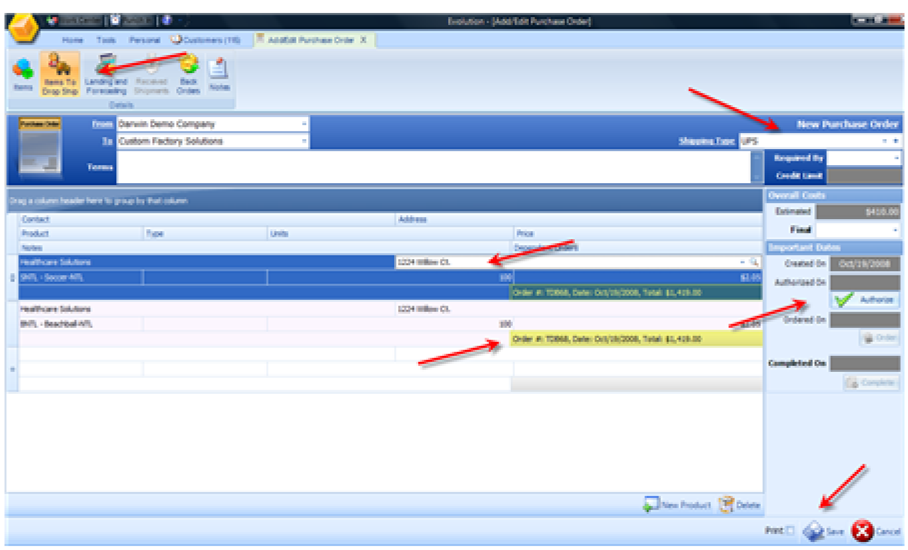
Once the Save icon is clicked if you have a Preferred Supplier set up for the Product then the Purchase Order will be automatically generated within that Preferred Supplier's account.

If there is not a Preferred Supplier set up then you will be prompted to choose a Supplier through the window you see below.



Simply type in all or part of a Supplier's name and a list with the search results will populate in the window. This example has a partial name, and you can see the results. You also can see the contact type. In this example only one Supplier was returned as a result of this search.

Highlighting the Supplier and clicking the Save icon will then generate the Purchase Order.

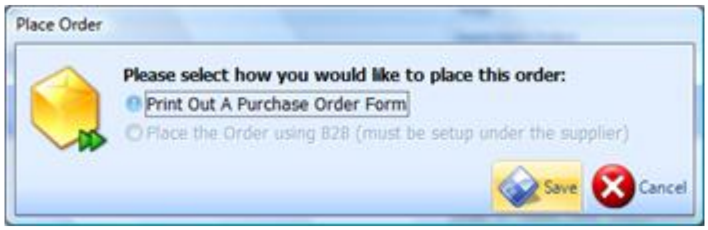


This Purchase Order has automatically been set up with several options already pre-selected.

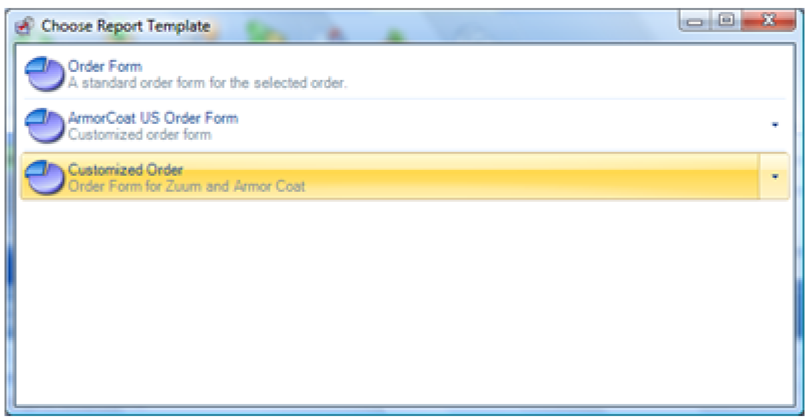
1. The Drop Ship icon in the tool bar is lit since the PO that will be printed out will be for Drop Shipping.
2. The default Shipping Address is chosen and can be seen in each line item of the PO.

Please Note: ***If there are multiple Shipping addresses you can specify one from the Search icon in the right side of the Address field. This can also be specified within the Order when it is created.***

3. The related order information is a part of each line item.
4. Specify the Shipper for this Order
5. Click the Authorize icon
6. If your User profile allows also click the order icon to print out the Purchase Order. The print Option screen shown below will appear.

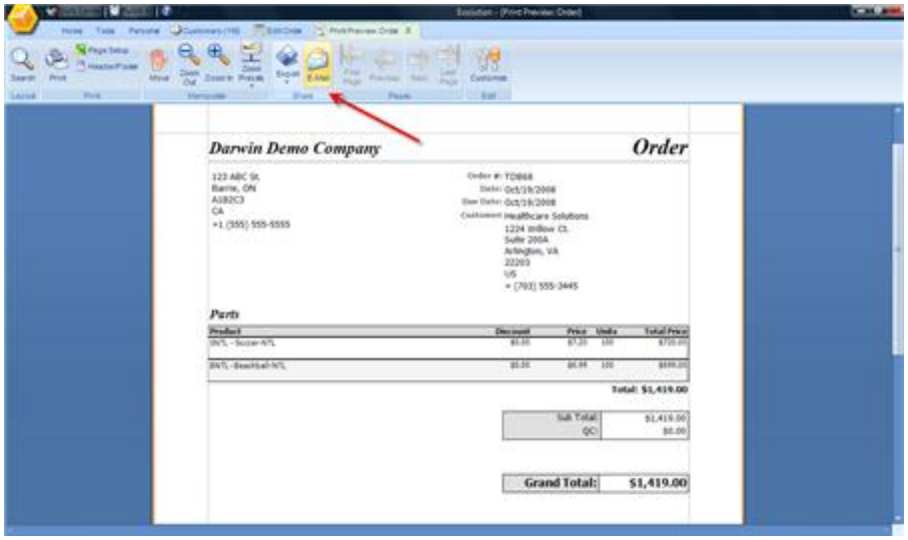


The following screen after the Print Out option is chosen will direct you to the Print preview screen for Purchase Orders.



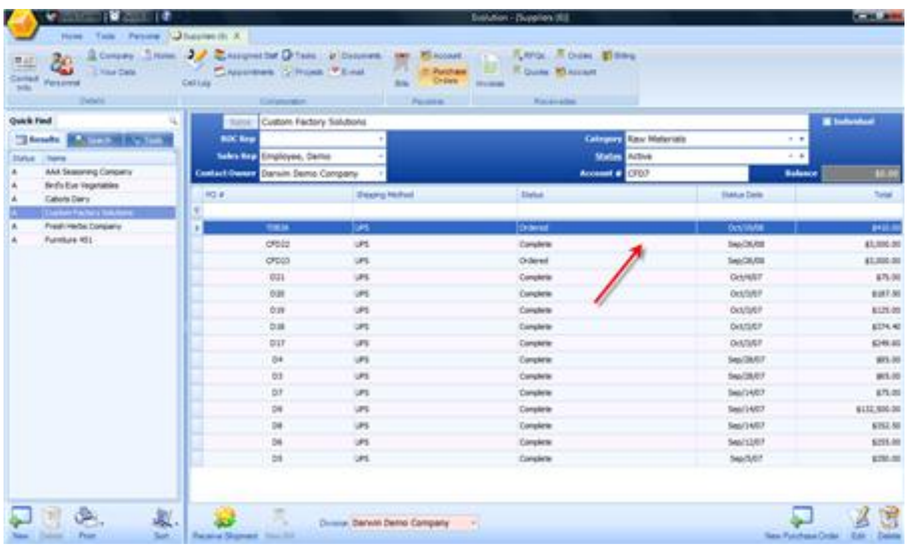
This option will be by-passed when you only have one Purchase Order form available. When multiple forms are available you will see this before the Print preview screen.

The next screen will direct you to the Print preview screen for the Purchase Order.



This example is a default report. The email and file export options above are the easiest way to send out Purchase Orders.

Once the Purchase Order has been Printed, Emailed, or Exported as a file the Purchase Order will be saved to that Supplier's account and listed similarly to the example below.

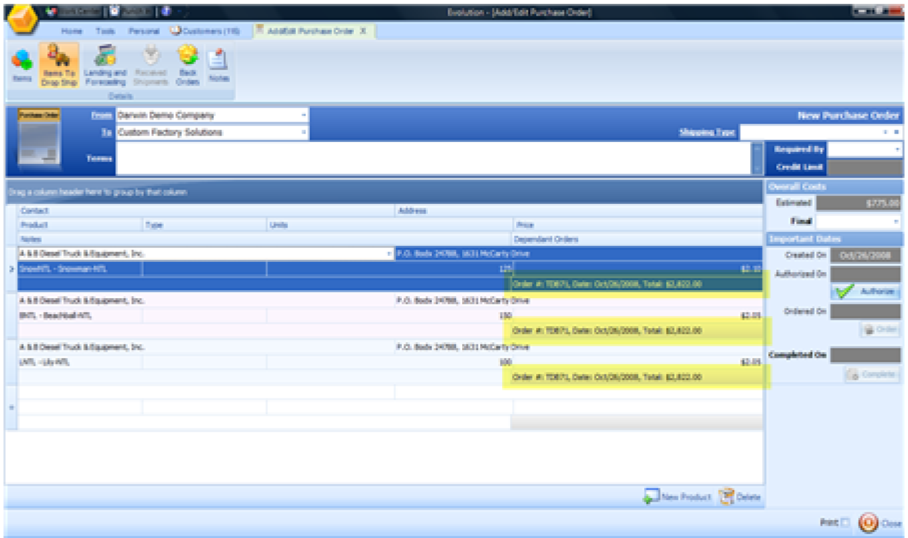


<u>Note:</u> For web Orders the process is the very much the same. Email notification will let you know how many orders have come in either overnight or when you are away from your computer. Search Tools and Reports can also be used to bring up all Orders that need to have Purchase Orders generated for Drop Shipping.

Orders – Tracking Tools for Drop Shipped Orders

Tradepoint supports order tracking for drop shipped orders. If you are using the auto create tool to generate Purchase Orders upon creating a drop shipped Order then the mechanism for tracking the related Purchase Order information within the Order is pushed back into an Order after the Purchase Order has been Ordered.

After a drop shipped Order has been created and then a Purchase Order pops up with the drop shipped items listed.

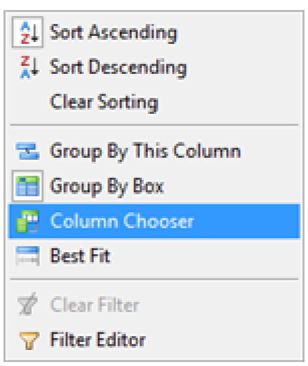


After the Order has been set to 'In production' the resulting Purchase Order pops up.

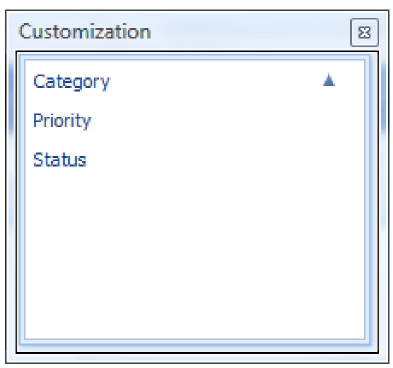
***Note:** Your Products will need to have a preferred Supplier set to each product for the Purchase Order screen to pop up without the prompt to search for a Supplier to assign the Purchase Order to. If you are prompted for a Supplier, then type in all or part of a name to bring up the preferred Supplier.*

After the Purchase Order has been generated once the items are Ordered then the corresponding Purchase Order information is pushed back into an Order for easy referencing.

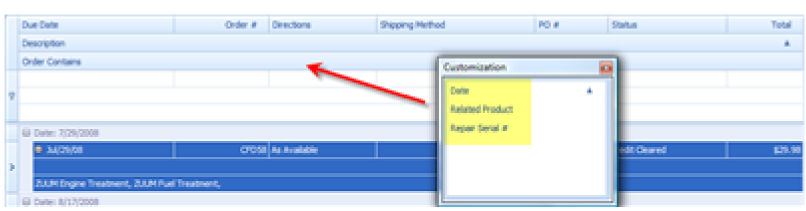
If the field (highlighted in the example below) does not show in your Order screen then right click on the header field to access the Column Chooser options for fields appearing in the Order screen.



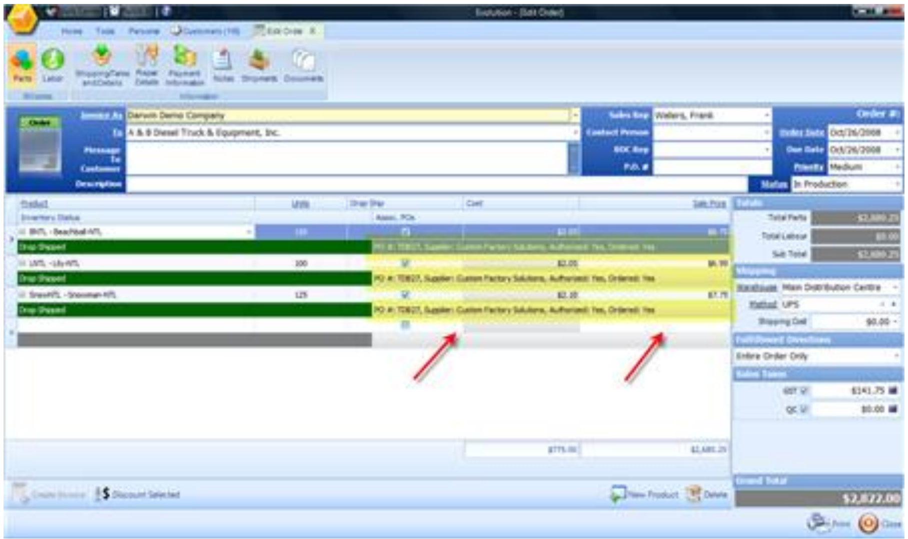
To:



and the next step is:



Once the Column Chooser appears the additional fields that can be dragged into the header fields of an Order that can be available



Once the PO information is brought into the Header Fields into an Order then the corresponding PO information will be available in all of your Drop Shipped Orders.

Invoices

Invoices will appear very similar to your Order screen with the same additional functions and settings. There are a few key differences between Orders and Invoices to be aware of.

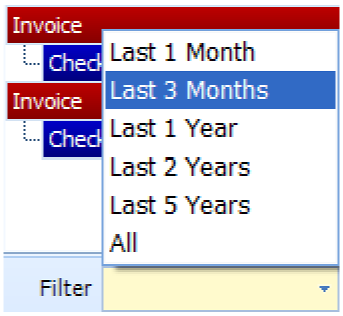
The screen below shows a main Invoices screen with activity. Each type of activity is color coded for easy recognition.

Items in Green are incomplete Invoices. This means that an Invoice has been generated but has NOT posted to the G/L Yet. Items in Red are completed Invoices that have posted to the G/L. Items in Blue are payments that have been applied to those invoices Items in Yellow are either Adjustments or Refunds that have been applied to an existing Payment on an Invoice.

Activity options are shown with the icons on the lower right of the screen. Please note that each type of item listed will highlight which different functions in the icons in the lower right of the screen. In this example a completed Invoiced has been highlighted so all icons in the lower right are highlighted as available functions.

Additional options are also available for viewing data including filter functions and the ability to view the same customer activity for more than one Division if that applies to your company. There are functions that are protected by security settings as well.

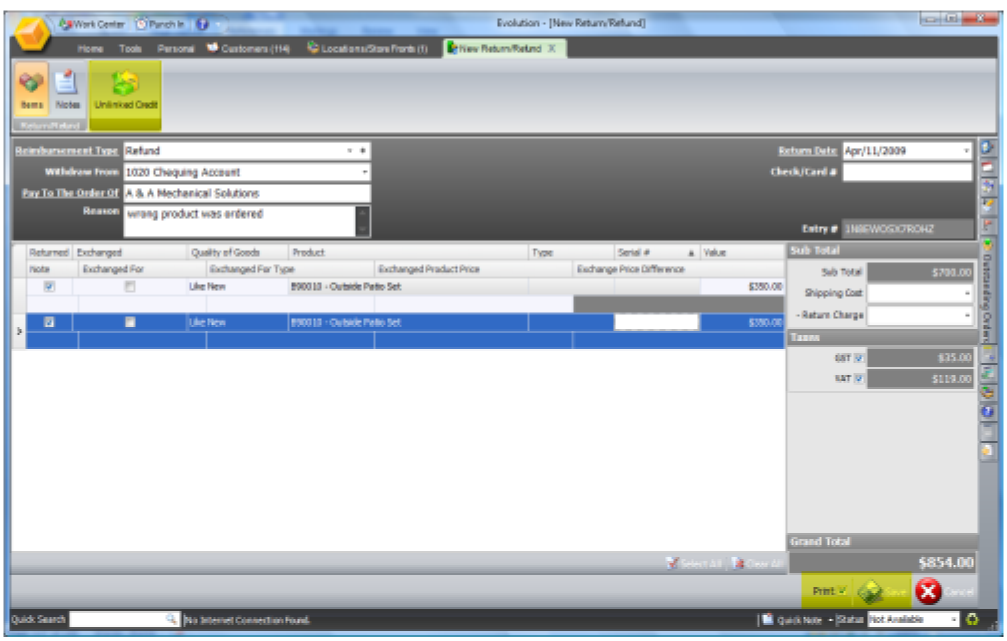
The invoice filter options are convenient the longer you use Tradepoint because your preference will be remembered and the more activity you accumulate the more activities for a specific period of time will be applicable.



Filters can also be found in a number of other places in Tradepoint including Orders, Bills and Purchase Orders.

RMAs -Returns & Refunds

Highlighting any Invoice will light up the Refunds icon for you to process a Return, Exchange or Refund within Tradepoint for a Completed Invoice. The screen you see below is an example of a Refund screen for an Invoice with multiple items on that Invoice. The option to choose specific items and whether or not they are exchanged or just returned is also available.

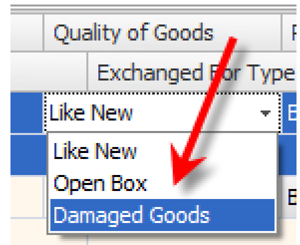


Check boxes and drop down menus are available to specify which items are being returned and in what condition. Your Reimbursement Type can be customized through the Blue Plus icon next to the field where you will be redirected to the exact field in the Setup and Configure Tool to add a new Refund Type.

Tradepoint supports manual Refunds where the details of the refunded items are processed within Tradepoint however any payment is processed through another interface.

RMAs and Refunds are processed on the payment screen of an Invoice that has been completed and payment has already been processed for.

Within a Refund product properties supported here include:

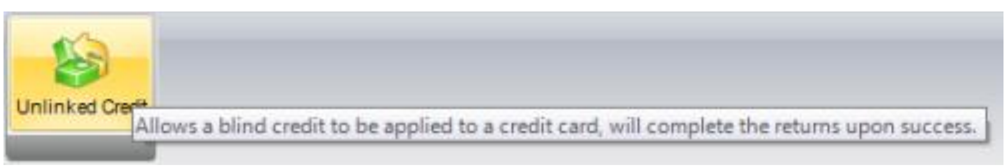


- Whether or not an item is being returned or exchanged. (check boxes on each item)
- Products with any Types(colors, sizes, etc) and serial numbers
- If a product is being Exchanged then for which one with any Types and serial numbers
- product price and exchanged item price
- Any additional Shipping Costs
- Any handling or restocking fees
- Any Sales Taxes
- The ability to Print out a receipt after a manual or unlinked Refund

Check based payments for manual refunds can be issued through Tradepoint by clicking the Print option when completing a manual refund.

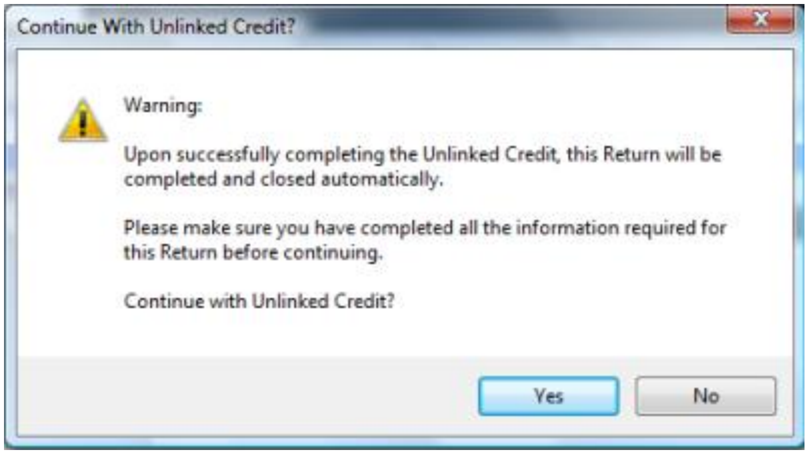
Unlinked or Electronic Refunds

Tradepoint also supports unlinked refunds which is an electronic refunds (which must be a feature supported by the payment gateway service being used such as Authorize.net) which will allow either an electronic refund to be completed through Tradepoint.

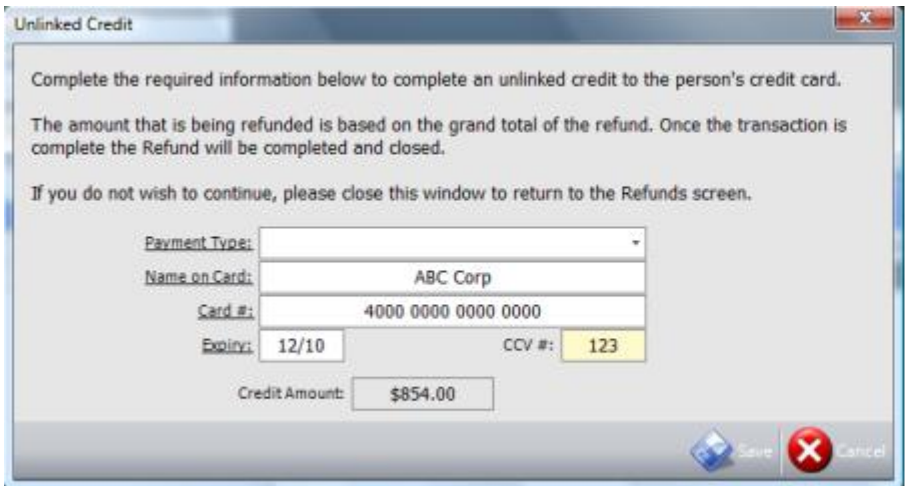


Unlinked Refunds can be processed to the original payment method used for the Order or be refunded to an alternate payment form.

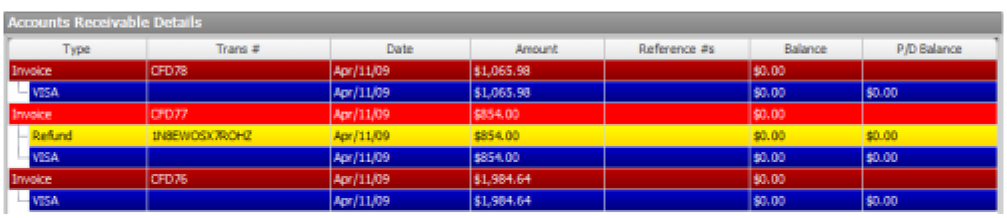
A prompt will pop up at the time an unlinked payment is attempted.



Clicking 'Yes' will direct the user to the screen to enter in the account information to receive the unlinked Refund.



Once the Refund has been completed it will appear on the Invoice screen attached to the Invoice and payment the Refund is related to.


Accounts Receivable Details

Type	Trans #	Date	Amount	Reference #s	Balance	P/D Balance
Invoice	CFD78	Apr/11/09	$1,065.98		$0.00	
VISA		Apr/11/09	$1,065.98		$0.00	$0.00
Invoice	CFD77	Apr/11/09	$854.00		$0.00	
Refund	1N8EWOSX7ROHZ	Apr/11/09	$854.00		$0.00	$0.00
VISA		Apr/11/09	$854.00		$0.00	$0.00
Invoice	CFD76	Apr/11/09	$1,984.64		$0.00	
VISA		Apr/11/09	$1,984.64		$0.00	$0.00

Tradepoint does not process Return and/or Refunds electronically out of the box. Your payment gateway account settings will determine whether or not you will be able to process unlinked Refunds electronically through Tradepoint without having to log into a secure website or portal to process a return after it has been processed in Tradepoint. Some providers currently support this feature such as Authorize.net

Each of the Merchant Service companies provides different tools for handling electronic Refund and Returns.

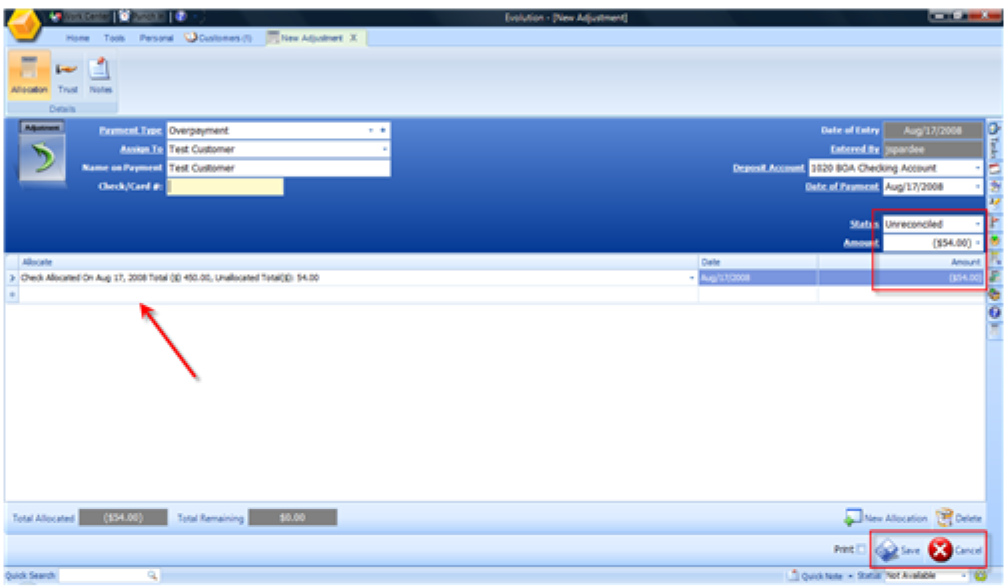
Payment gateways currently supported by Tradepoint include:

- Authorize.net
- Skipjack Financial Services
- Beanstream
- Moneris eSelect Plus Direct
- Google Checkout
- Protx
- Paypal Pro Service
- Link Point Connect

Adjustments

Adjustments can be added to an existing payment on an invoice. Highlighting a payment and clicking on the adjustment icon will open the screen you see below. A few options will be set as a default:

- The total of the payment will be in the highlighted screen. This is editable to match the amount of the Adjustment.
- The Deposit account will be set to the defaults you have in your company settings. This can be changed by clicking on this field and choosing a different account
- The date can also be edited by clicking on the field and using the dynamic calendar built into the field.



Changes that are saved will automatically be applied to the payment and show up in the Invoices screen as a Yellow item linked to a payment in the Invoices screen.

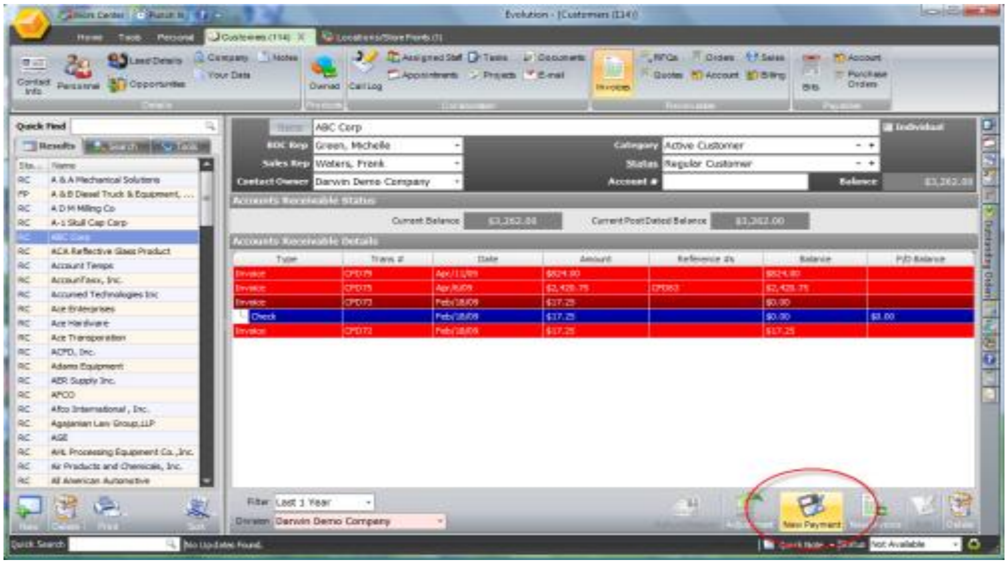
Each Customer, Reseller, and Supplier has the ability to process Invoices, Returns, refunds, Adjustments and Pre-Payments on a contact by contact basis.

From within the G/L directly you can create and process Invoices and as they are assigned to a contact they will also appear in the contact file under Invoices as they are processed within the General Ledger.

Applying one Payment to Multiple Invoices

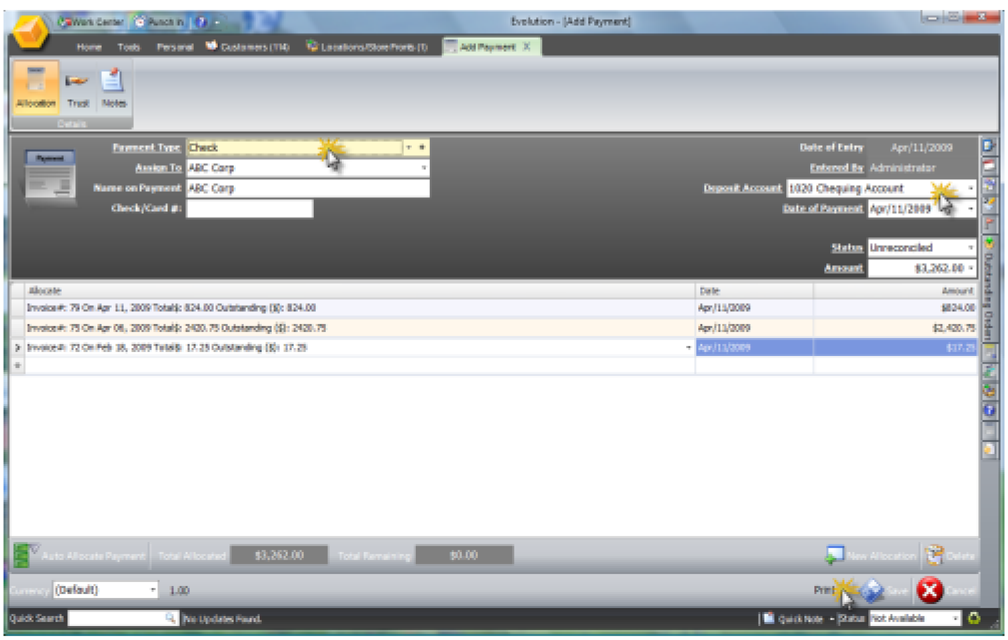
Applying a single payment to multiple Invoices can be done two ways.

1. From an Invoices screen highlight multiple Invoices by holding down the Control key and clicking on multiple Invoices.

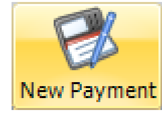


Click the New Payment icon. 

The payment screen will open with the items highlighted already entered into the line items so payment can be applied.

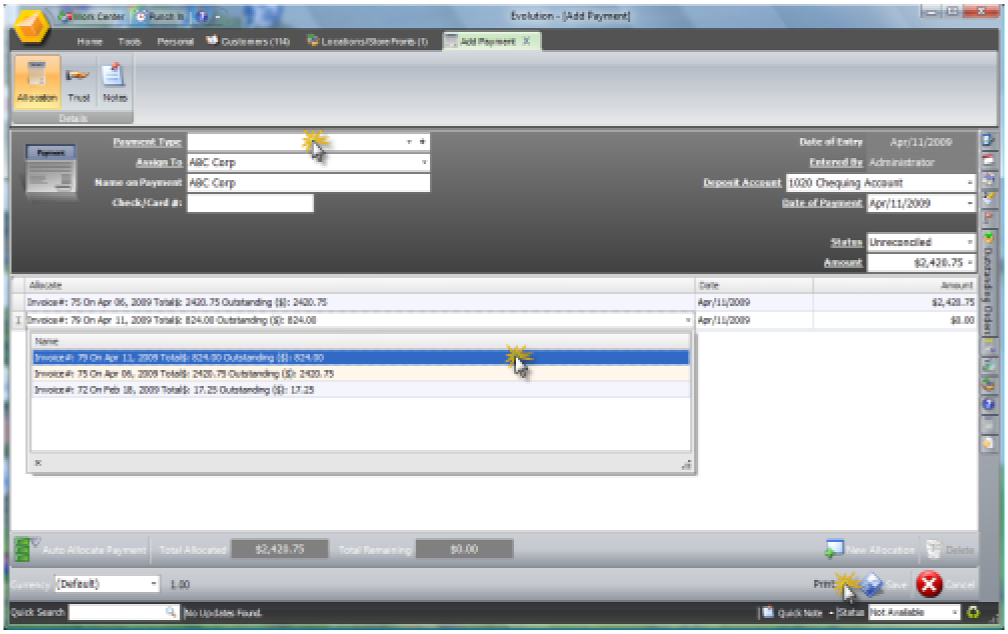


Choose the Payment Type (check, cash, VISA, MC, etc.). Verify the deposit account and adjust if necessary. Click the Save button and Print to Print out or email a receipt for payment.

2. The second option to apply one payment to multiple invoices is to click on the New Payment icon 

from the Invoices screen.

If any Invoices had been highlighted they will show up already pre-populated on the screen. If not Invoices which still need a payment applied will appear in the drop down menu in the payment screen.



Pick one or all existing Invoices for payment and Save/Print to apply payment and print out a receipt.

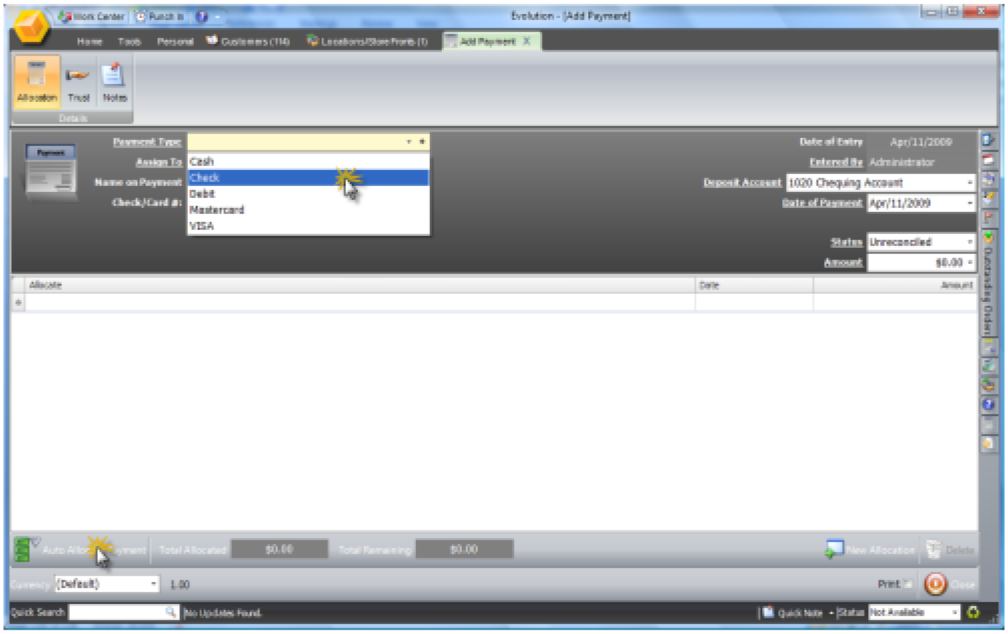
Deposits/Pre-Payments

Accepting a Deposit/Pre-Payment happens in the same way as taking a payment on an Invoice only the option to specify a payment as a Deposit/Pre-Payment versus a payment.

To be able to accept Deposits/Pre-payments a Trust Account will need to be setup in the General Ledger. A trust account is where all Deposits/Pre-payments will be allocated until a time as they are assigned to a particular Invoice as payment.

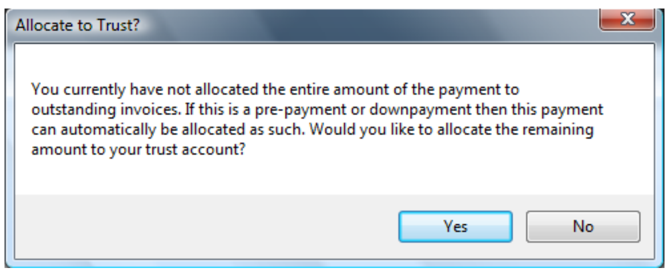
From an Invoice screen click on the New Payment icon 

On the payment screen be sure there are no allocated items listed.



Check off the payment type. Click the Save icon. Check off the print option if a receipt of Deposit needs to be emailed to the customer.

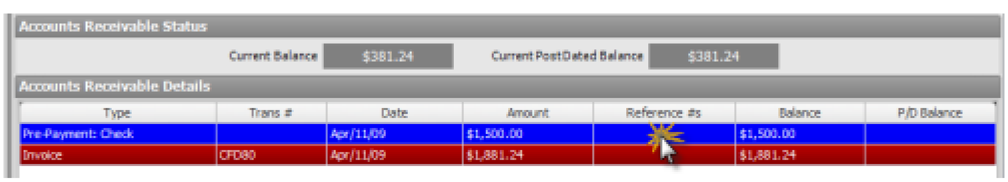
The following prompt will appear next.



Click Yes. The invoices screen will show the Deposit/Pre-payment as a listed item in that screen.

Applying a Deposit/Pre-Payments to an Invoice

To apply a Deposit/Pre-Payment to an incoming Invoice go to the Invoices screen and double click on the Pre-Payment.



Accounts Receivable Status

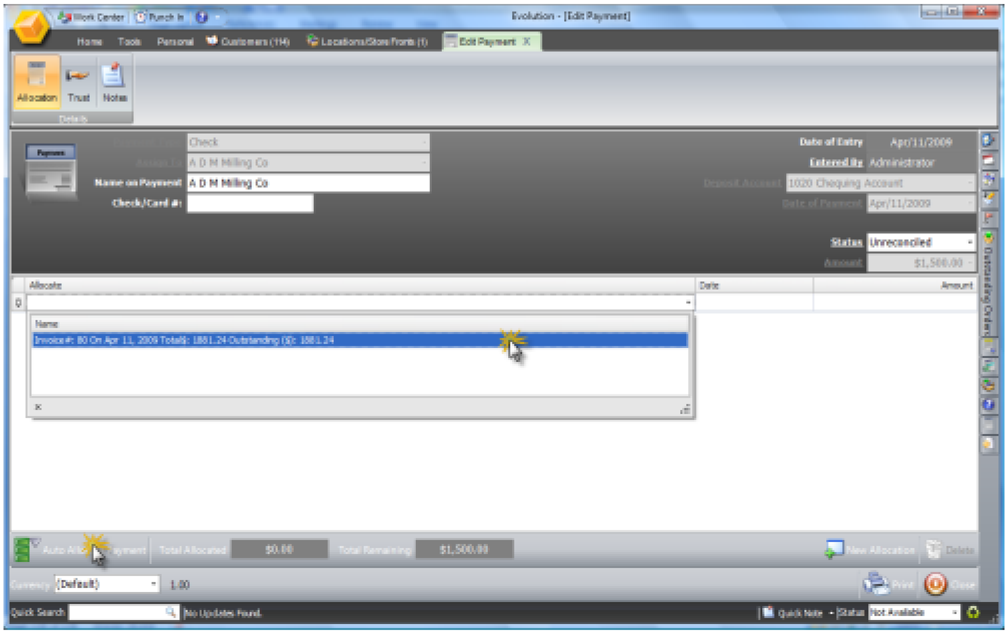
Current Balance $381.24 Current PostDated Balance $381.24

Accounts Receivable Details

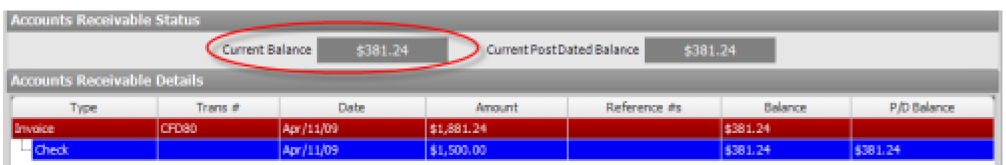
Type	Trans #	Date	Amount	Reference #s	Balance	P/D Balance
Pre-Payment: Check		Apr/11/09	$1,500.00		$1,500.00	
Invoice	CFD80	Apr/11/09	$1,881.24		$1,881.24	

The payments screen will open with the pre-payment information already populated in the fields.

Choose from the drop down menu the Invoice/s the Deposit/Pre-Payment will apply to and Click the Save/Print options to apply the Deposit/Pre-Payment to an Invoice.



The results will appear just like an Invoice with a payment applied. Any additional balance will appear in the top field in the invoices screen and in the P/D Balance column.



Accounts Receivable Status

Current Balance $381.24 Current Post Dated Balance $381.24

Accounts Receivable Details

Type	Trans #	Date	Amount	Reference #s	Balance	P/D Balance
Invoice	CFD80	Apr/11/09	$1,881.24		$381.24	
Check		Apr/11/09	$1,500.00		$381.24	$381.24

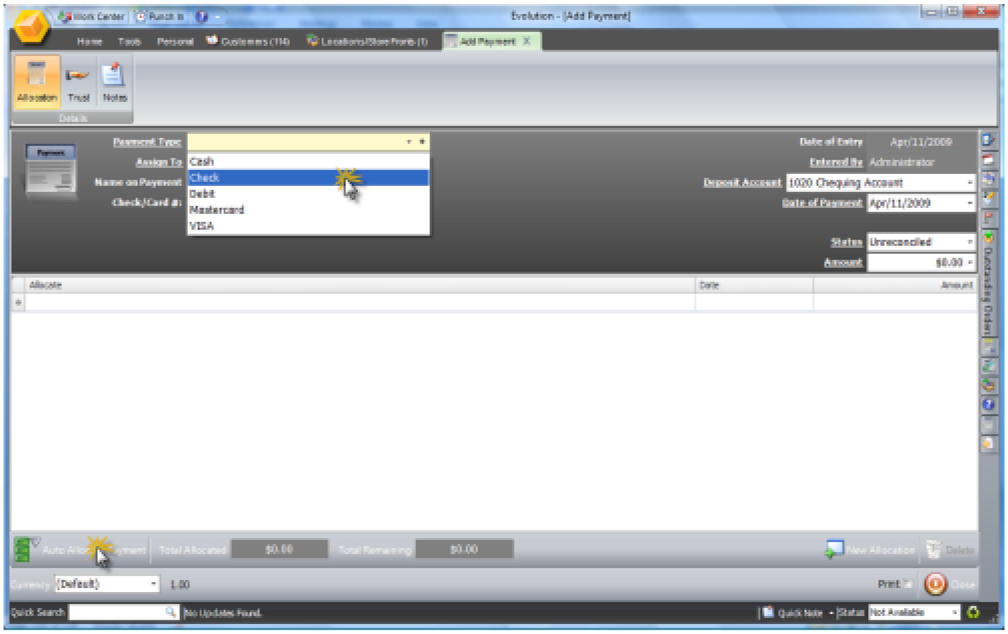
Credit Memos for Customers

Applying a Credit Memo to a customer account follows the same process as accepting a Deposit/Pre-Payment to a Customer account

To be able to apply a credit memo a Trust Account will need to be setup in the General Ledger. A trust account is where all credit memos, deposits, and pre-payments will be allocated until a time as they are assigned to a particular Invoice against a payment.

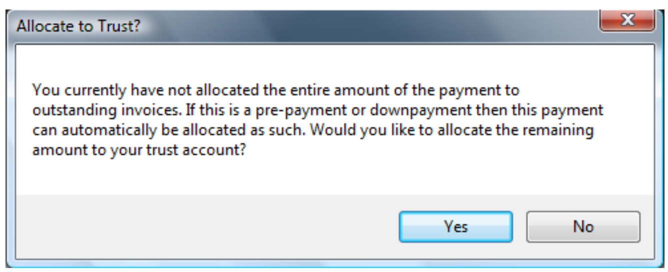
From an Invoice screen click on the New Payment icon 

On the payment screen be sure there are no allocated items listed.



Check off the payment type. Click the Save icon. Check off the print option if a receipt of Deposit needs to be emailed to the customer.

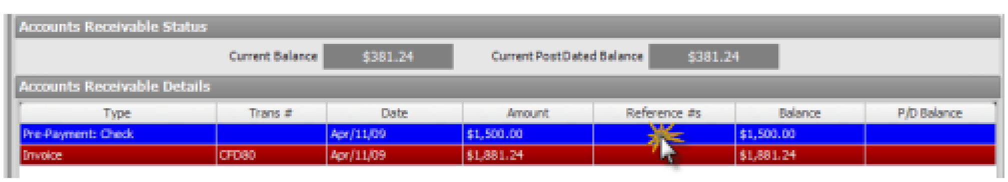
The following prompt will appear next.



Click Yes. The invoices screen will show the Deposit/Pre-payment as a listed item in that screen in blue.

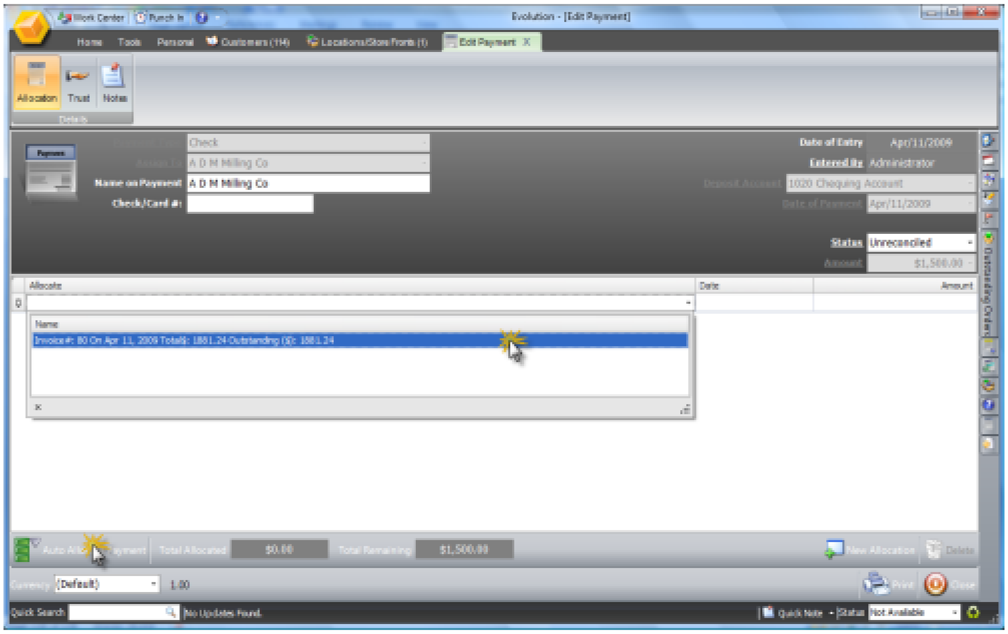
Apply a Credit Memo Against an Invoice

To apply a credit memo to an incoming Invoice go to the Invoices screen and double click on the Pre-Payment.

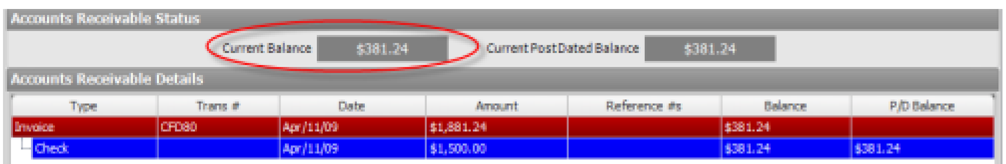


The payments screen will open with the pre-payment information already populated in the fields.

Choose from the drop down menu the Invoice/s the Deposit/Pre-Payment will apply to and Click the Save/Print options to apply the Deposit/Pre-Payment to an Invoice.



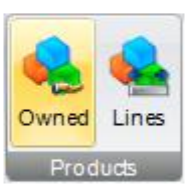
The results will appear just like an Invoice with a payment applied. Any additional balance will appear in the top field in the invoices screen and in the P/D Balance column.



Resellers

Resellers supports all the functionality available present within Customers as well as tools to support companies that use Resellers to distribute their products and services.

The main screen for Resellers will appear very much like Customers with and additional icon for Products Owned and Lines in the main tool bar.



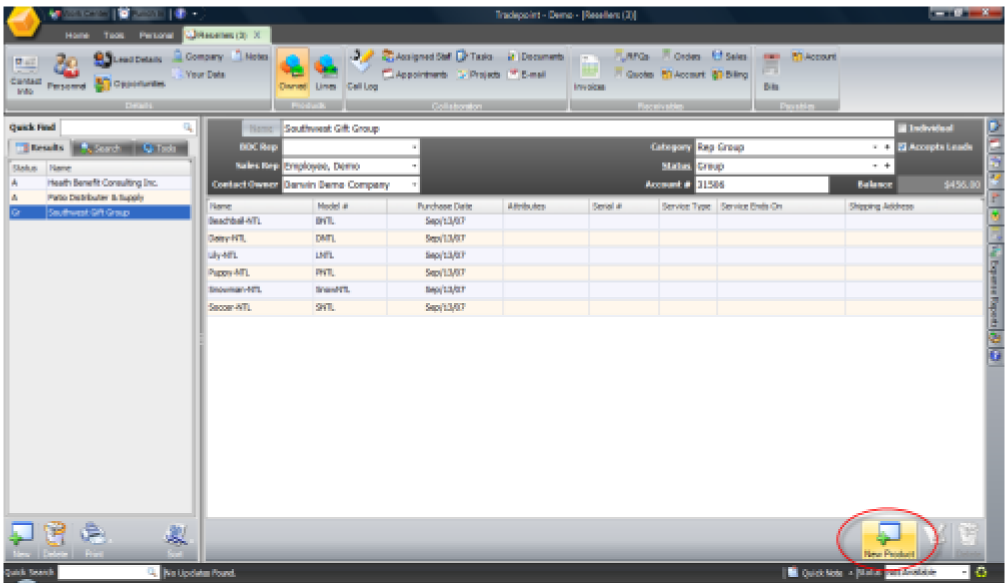
Within Customers the Products owned track each product that is sold to Customers. This is the same for Resellers with the ability to track the Name and contact information of that product if sold to a different contact. This feature is ideal for providing any warranty support for your Resellers.

Products Owned

Products Owned track the details of any products purchased by a Reseller. Product purchased will automatically be pushed into this section (based on the preference set on all Products). Products can also be added manually if necessary.

Product details can be edited after a Product has been sold. This supports tracking Reseller sales for each product. Additional information tracked within Products Owned includes:

- Product/Service Name & Model #
- Purchase Date
- Attributes (properties in custom specified fields)
- Serial Numbers(if applicable)
- Service Type/ Service Dates – This pulls from set Service attached to a product and any date that is related to the Service type (ex. 1 year warranty which expires one year from the purchase date)
- Shipping Address – Address of Reseller or contact Product was sold to through Reseller



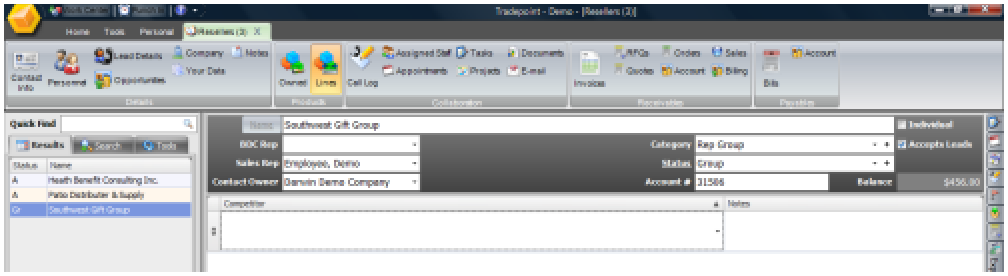
Clicking on any existing products Owned will open a details screen for that specific product to be able to provide additional detail and follow up activity on that product if necessary. This is ideal for providing support for Resellers for serialized products and any warranty support.

Actions that can be performed related to a specific Product Owned include:

- Track Sales Details and Accessories
- Create Custom Fields and Notes
- Create Call logs specific to the Product Owned
- Schedule Appointments for on-site visits with clients
- Create Work Orders within a Product Owned

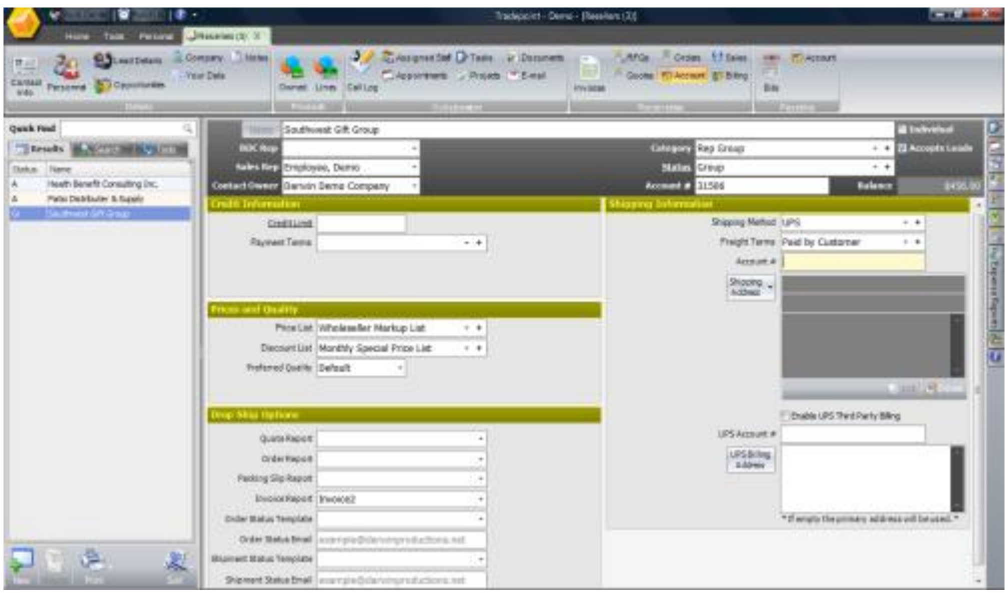
Product Lines

Product Lines support tracking other product lines that Resellers are also carrying in addition to the product and services they sell directly. A simple screen structure enables multiple products/services to be entered easily within each Reseller.



Account Information

Resellers support the ability to enable specific Account Settings which support ongoing communications and preferences related to shipping, shipping services, price lists and automatic triggers for email communications.



Credit Information for Resellers

- Credit Limit – Establish Credit Limit here. ***If this option is used then any Orders/Invoices placed that go over the limit with an unpaid balance will be prompted that the Credit Limit has been reached and the balance will need to be paid or a higher limit set.***
- Payment Terms – Payment terms specific for this Reseller.

Prices and Quality

- Price Lists – Set Reseller Price List. Any Price List set here will push pricing information into orders/Invoices and extend to the webs for use through the shopping cart.
- Discount List – This list will set a limit on the discount that can be set through orders/Invoices and through the web.

- Preferred Quality – Default, Best, Fastest, Cheapest – Product re-ordering for this Reseller will be defaulted by this preference in Purchase Orders. (This option is editable.)

Drop Ship Options for Resellers

- Quote Report – Automatically pulls up a Quotation for a particular Reseller when the print option is chosen within Quotes. ***This option requires more than one Quote template to be setup in Quotes.***
- Order Report – This option assigns a specific order template to a given Reseller and functions similarly to Quote Report. ***This function also requires more than one Order form to be set up to function.***
- Packing Slip Report – Automatically pull up a customized packing slip for a particular Reseller for drop shipping purposes. ***There must be more than one customized packing slip already set up within Packing Slips to function.***
- Invoice Report – Automatically generate invoices on behalf of your resellers when more than one customized Invoice is set up. Supports drop shipping for Resellers.
- Order Status Template - This option assigns a specific order template to a given Reseller and functions similarly to provide a status email for a specific order. ***This function also requires an email template to be set up.***
- Order Status Email - This option pulls an assigned email template for a status report for a specific order to a given Reseller and functions similarly to provide a status email for a specific order. ***This function also requires multiple email templates to be set up.***
- Shipment Status Template - This option pulls an assigned email template for a shipment status for a specific order that has been shipped to a given Reseller and functions similarly to provide a status email for a specific order. ***This function also requires multiple email templates to be set up.***
- Shipment Status Email - This option pulls an assigned email template for a shipment status report for a specific order that has already been shipped to a given Reseller. ***This function requires multiple email templates to be set up.***

Shipping Information

- Shipping Method – Preferred Shipping method for Reseller.
- Freight Terms – Preferred Freight terms for a given Reseller.
- Shipping Address – Store multiple Shipping addresses as needed.
- Enable UPS 3rd Party account shipping – For Resellers requiring this option. This must have the UPS Account information filled in to function.

Warehousing

Setting up a single warehouse location

Setting up a single Warehouse in Tradepoint is a easy to do process involving:

- Naming the Warehouse
- Adding Contact Information

Activity having to do with products, transfers, adding inventory and receiving items are processes which can be accessed through Warehouses or at different access point on the Supply Side in Tradepoint.

In Tradepoint starting from the Home tab, click on the Warehouse icon to create a single Warehouse. The 'New' icon in the lower left will open a New Warehouse.

Add the Name of the Warehouse and then the address along with any additional address and contact information. The single Warehouse has been setup.

From here the Warehouse will pop up as an option when:

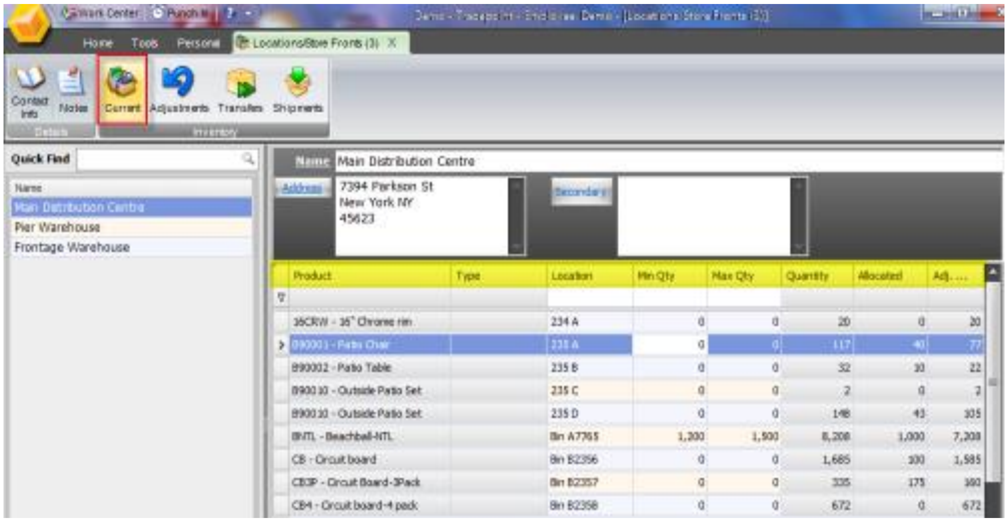
- Receiving Inventory
- Creating POs as an option to where the items will be received
- Inventory Adjustments
- Warehouse Transfers (requires more than one warehouse to be setup)

Setting up Multiple Warehouse locations

Setting up multiple locations is repeating the process for setting up a single warehouse location. When more than one location is setup in Tradepoint it will appear as shown below.

Warehouse Tools – Current

Within a Warehouse the Current icon will show the current product details including Inventory levels, what is allocated to open Orders, and where an item is in the Warehouse within a given location. Click once on any Warehouse and then click the Current icon on the top tool bar and the Current screen will open.

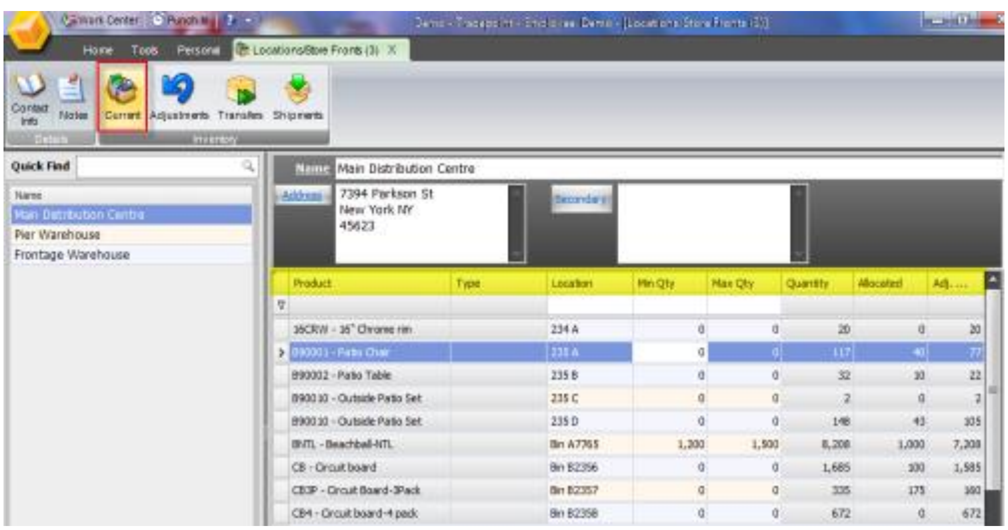


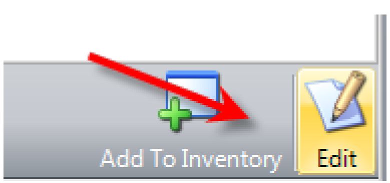
These numbers will update as orders are processed and products are received into the Warehouse so, these numbers will fluctuate throughout a given day.

Warehouse Tools – Inventory Adjustments

Adjustments on existing Inventory can be done through the Edit icon seen within Warehouses. If you have multiple Warehouses choose which one to adjust a specific item.

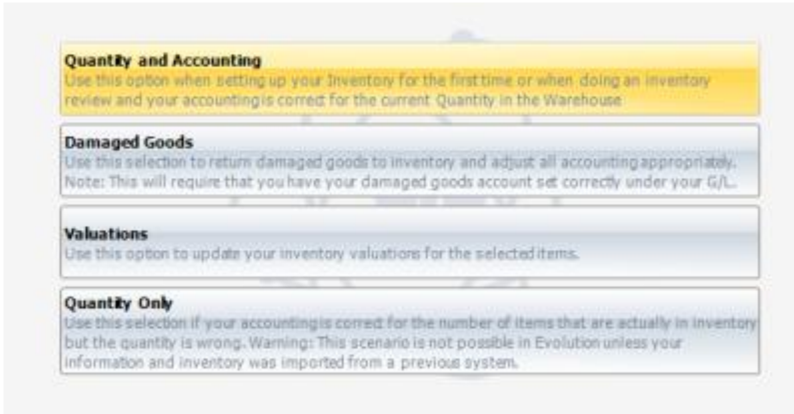
Highlight the item to adjust and click the ‘Edit’ icon in the lower right of the Warehouse screen.





The Inventory Adjustment wizard will open up and walk through a three step process to adjust an item.

The first screen will have 4 options for the inventory adjustment.



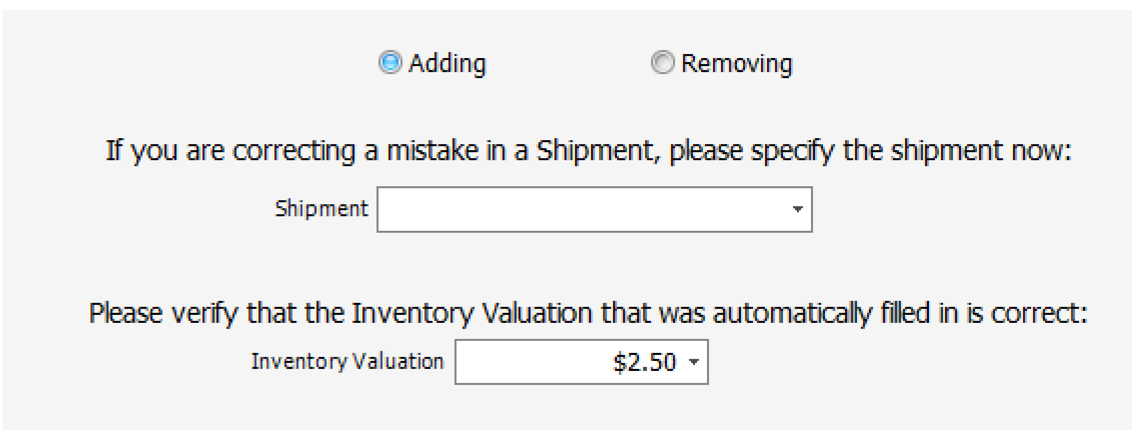
Quantity and Accounting – Use this option for setting up Inventory for the first time or when doing an inventory review (and adjustment) and accounting information on products is correct for the current quantity in the Warehouse.

Damaged Goods – Use this option to return damaged goods to inventory and to adjust all accounting appropriately. Please Note: This will require a Damaged Goods account be setup in the general ledger.

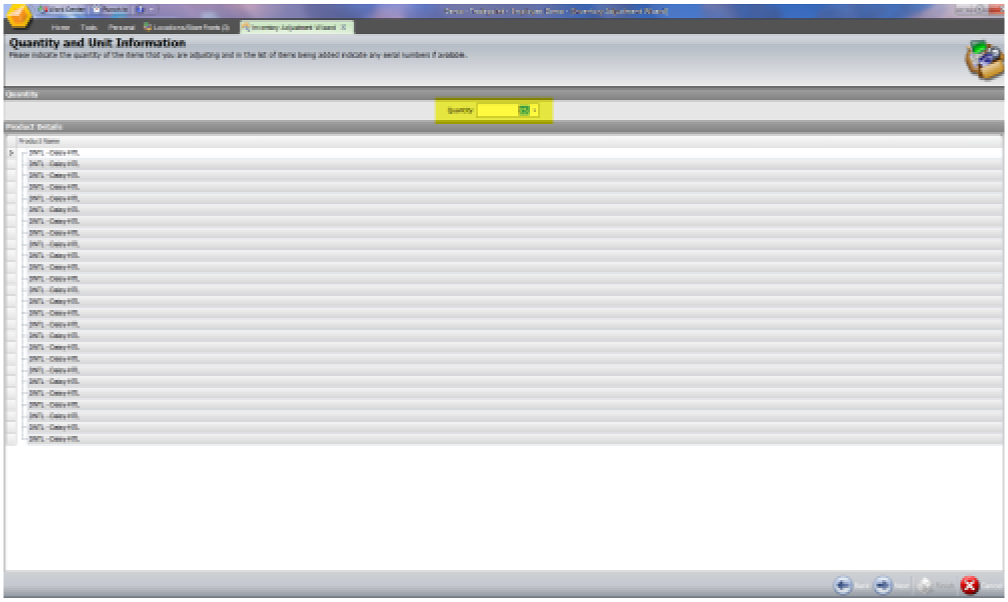
Valuations – Use this option to update your inventory valuations for the selected items.

Quantity Only - Use this option if the accounting information is correct for the number of items actually in inventory but the quantity is wrong. Please Note: This scenario is not possible within Tradepoint unless accounting information and inventory were imported from a different software system.

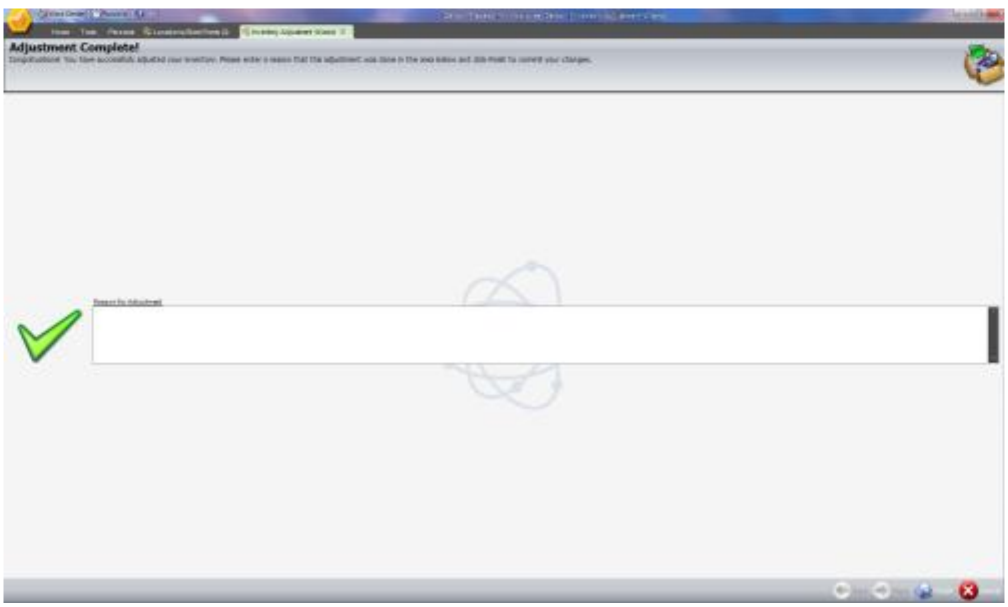
Once the correct option has been chosen (the majority of adjustments will be the top option in the menu shown above for quantity and accounting information) then the next screen will prompt for information about quantity of the product and whether or not those products are coming from a shipment or not.



If the inventory adjustment is not from a shipment then choose adding or removing and verify the valuation and click Next in the lower right corner to go to the next option.



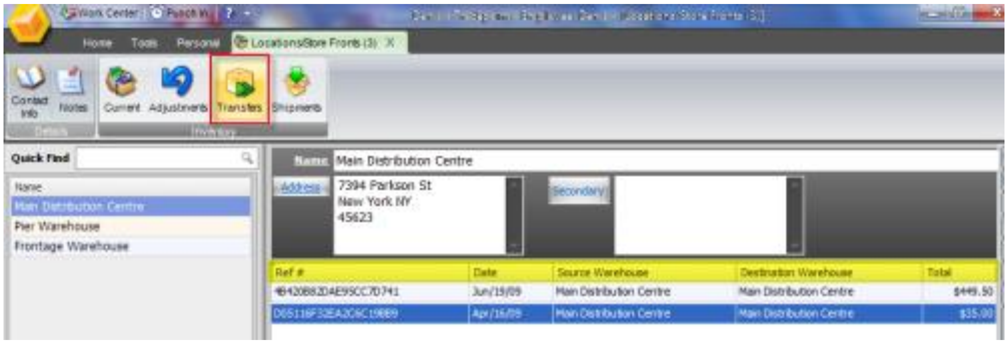
The quantity is highlighted at the top of the screen and each item is listed. Click the Next icon in the lower right to go to the last option to enter in a reason for the adjustment.



A reason is not mandatory, so clicking the Finish icon will close out the screen and update your product. The reason of adjustment will be visible from the adjustments screen giving you an overview of all adjustments in Tradepoint.

Transfers

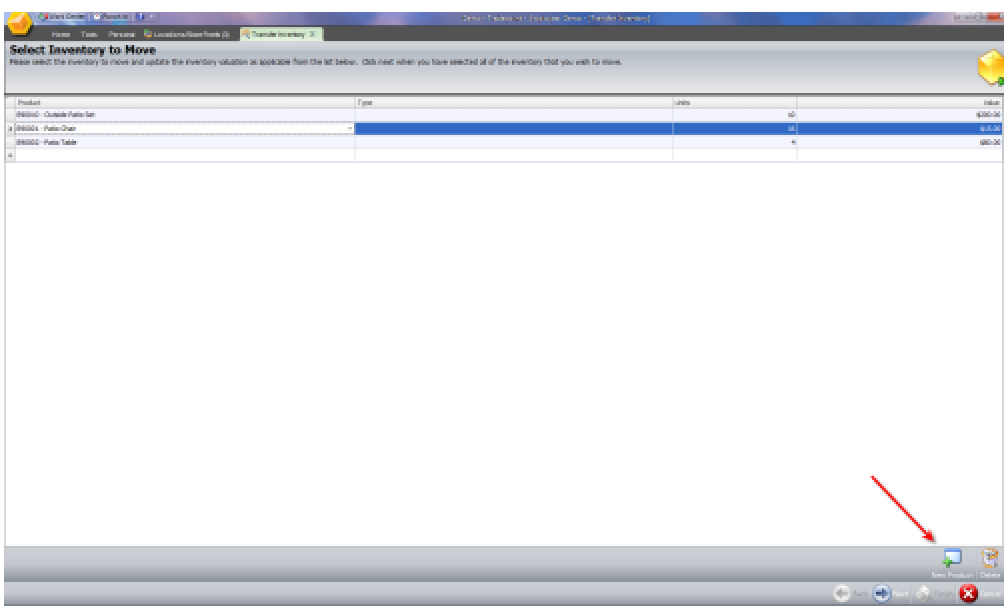
A transfer requires at least 2 warehouse locations to be present in Tradepoint.



Creating an Inventory Transfer is done by highlighting the warehouse the Inventory is coming from, clicking on the Transfers icon in the top toolbar and then clicking the 'New Transfer' icon in the lower right. A wizard will walk through a few questions about your products and where they are going to.

Next specify the destination Warehouse.

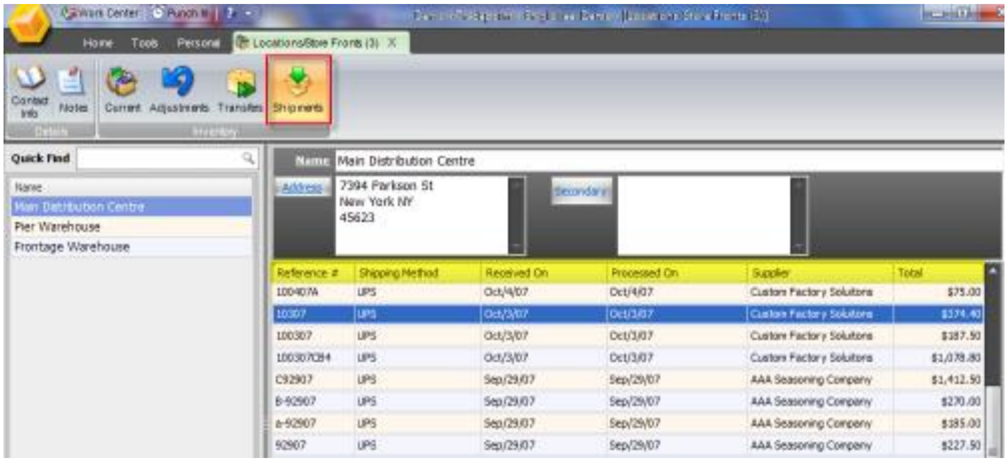
Then specify which products and how many of them on the next screen.



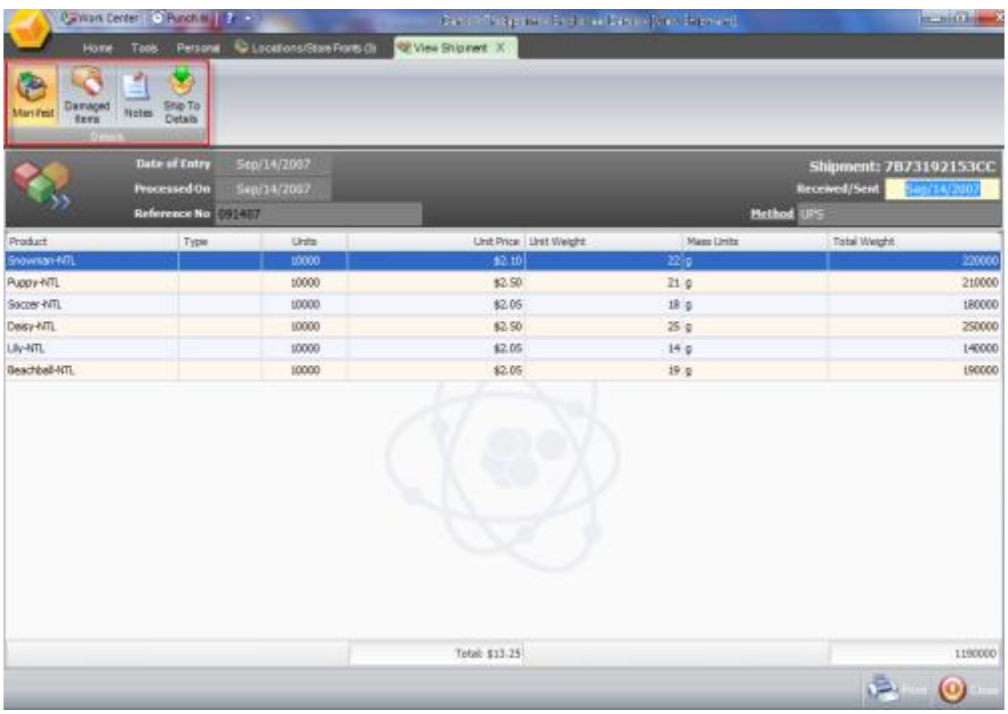
The next prompt will be to finish the transfer and then the products will be transferred to another warehouse.

Shipments

The shipments section of Warehouses holds a history of all incoming shipments into Tradepoint. This means as shipments are received the history posts to the Shipments section of Warehouses



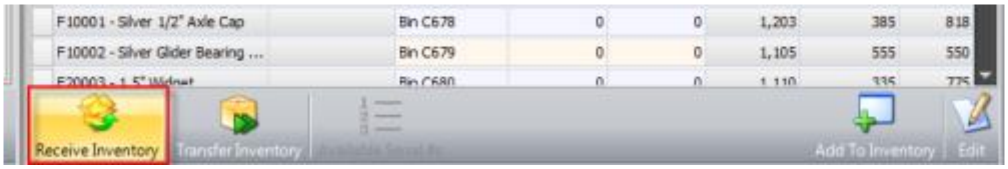
Double clicking on any one of the Shipments will open up the details of a shipment.



The main screen will be the manifest details and any damaged items, Notes and Ship To Details can also be accessed from this screen.

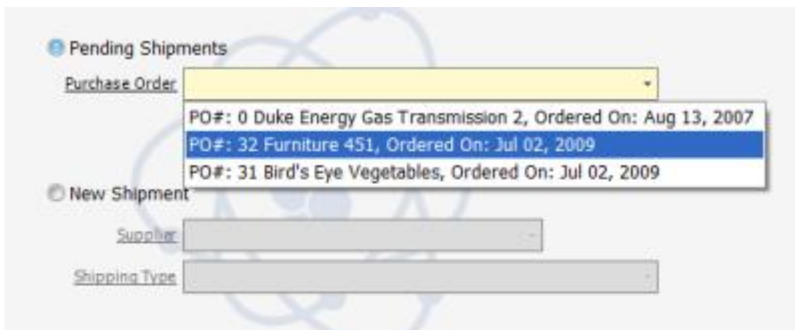
Receiving Inventory

Receiving products can also be accessed from the current screen in Warehouses. The 'Receive Inventory' icon in the lower part of the screen will open the receiving wizard (Items can also be received against a specific Purchase Order through the Purchase Order screen of a Supplier with a specific PO highlighted).

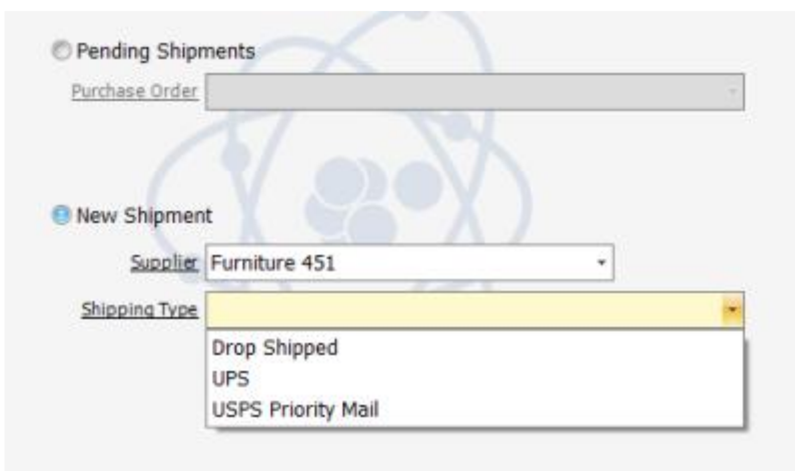


The receiving wizard walks through a few steps to bring in Inventory. There is also an option to create a PO on the fly for items that are being received but did not have a PO created.

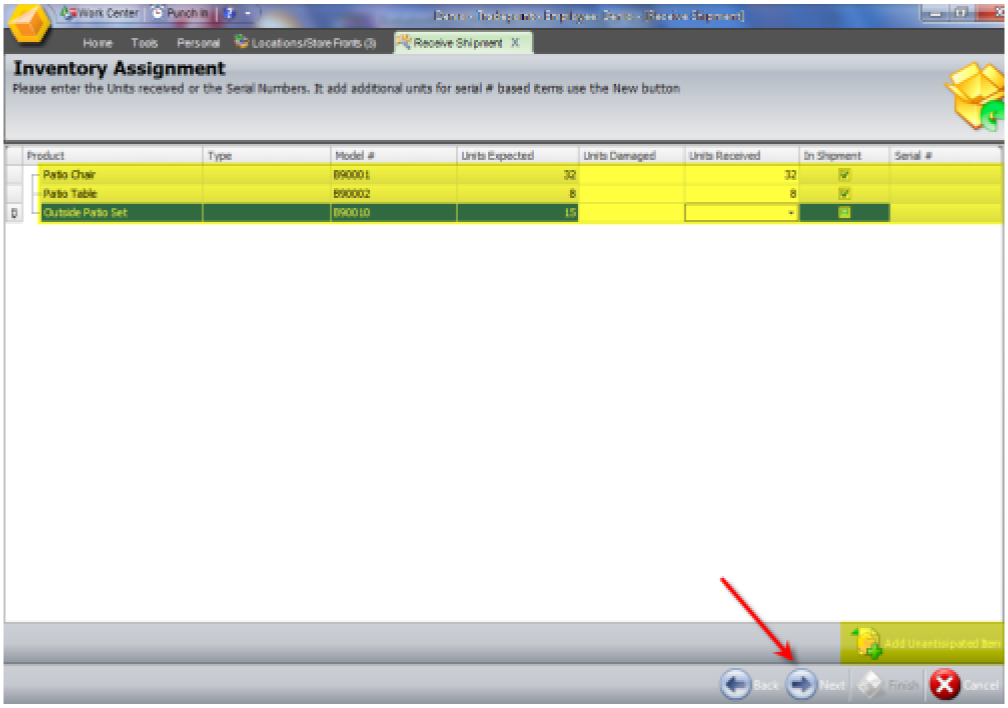
The first step in the receiving wizard will prompt an option to choose from an existing PO or to create a PO and link it to a Supplier.



To generate a PO use the option on the bottom.

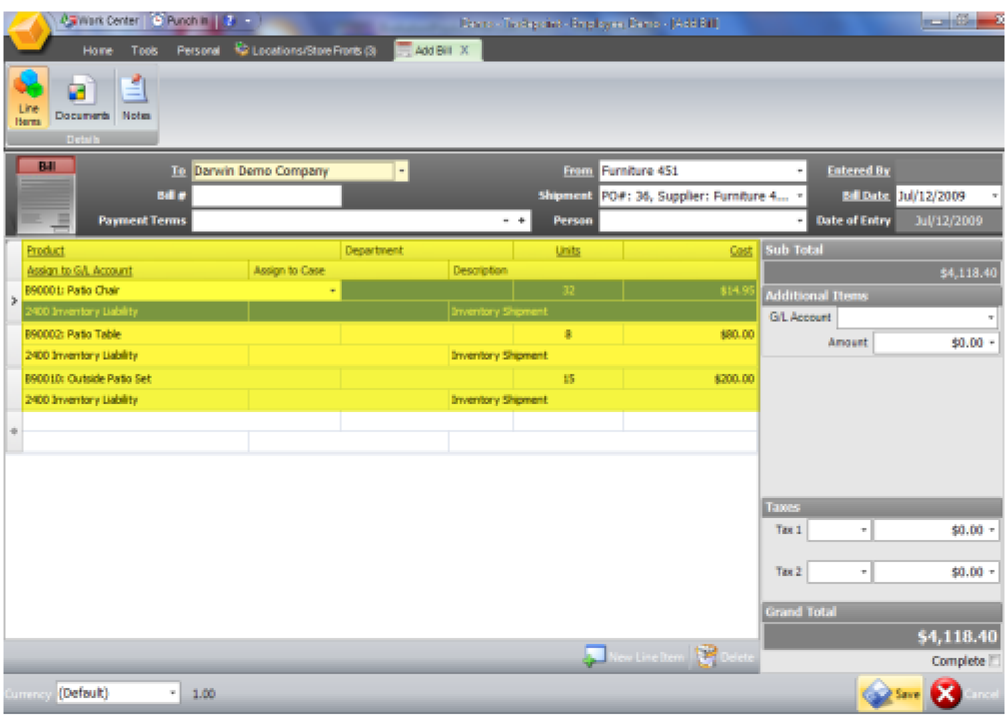


The next option will prompt for details about the products in a shipment, any unanticipated items that may have been shipped and any damaged items.



After any products, unanticipated items and damaged items have been entered the final screen will have an option to create a reference number and a check box option to automatically create a Bill based on what has been received.

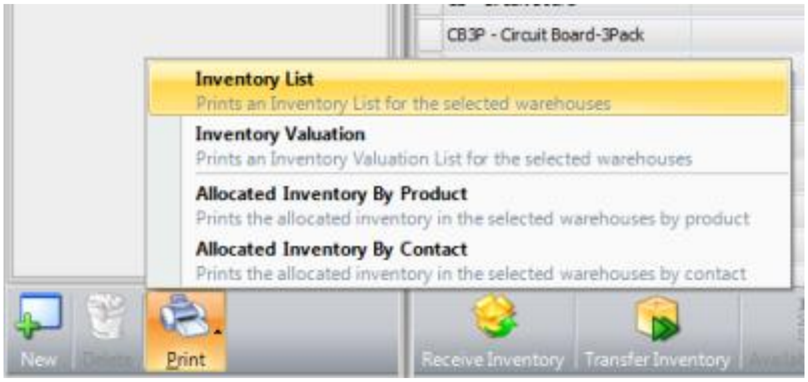
If this option is chosen once the Finish icon is clicked on the final screen then the next screen will be the Bill that has been created.



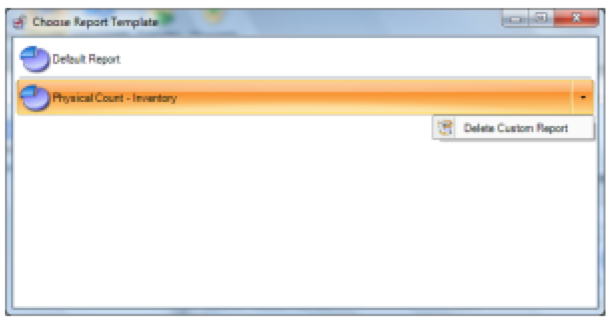
Click Save if you might add items to the Bill later, otherwise Complete the Bill and the screen will direct back to the Warehouse screen.

Inventory Reports

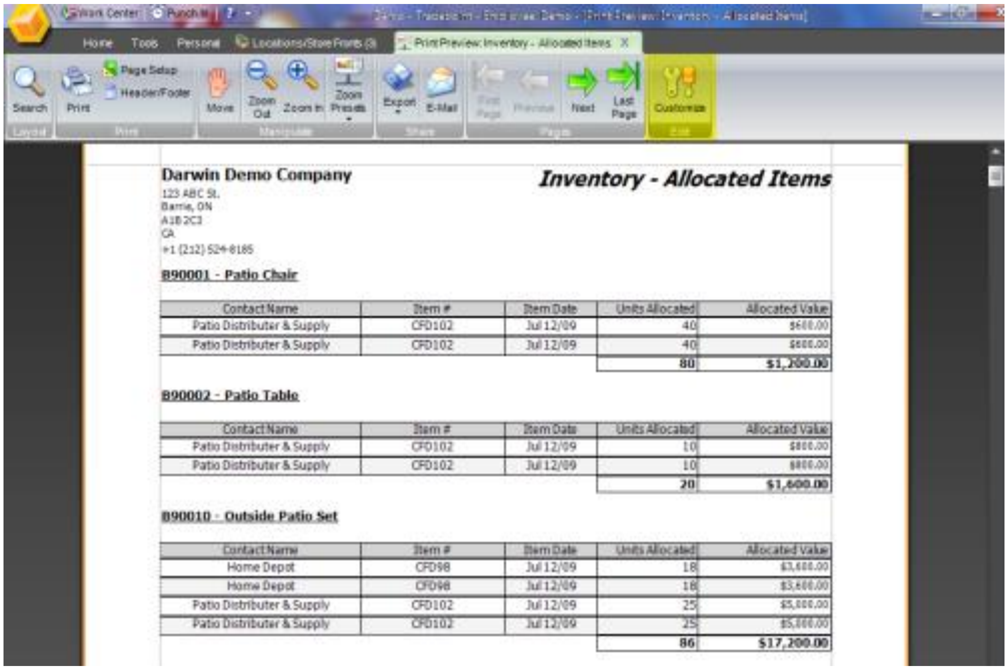
The Warehouses section includes 4 customizable reports for Inventory.



Since these are customizable different reports can exist. When more than one report has been setup the next prompt will show a menu with the different report options to choose from.



An option to Delete any additional reports other than the default template can be found by clicking on the right side of the reports,

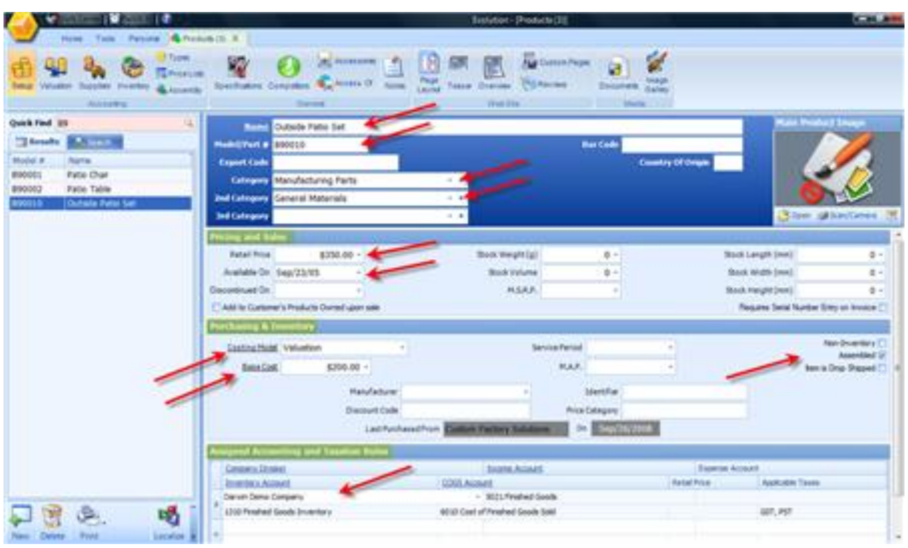


Use the Customize option highlighted in the top tool bar to add a logo or make other customizations to the report. Save your changes and the additional report will be in the menu when choosing the print option for Warehouse reports.

Products

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 Category. The Blue Plus icon will allow you to set up product categories on the fly as you need them.
- 2nd Category – Also called a product sub-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 Costing Model – Allows you to manage varying costs when purchasing Products.
  3. Per Purchase Order Costing Model – 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 product 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.

Sales Taxes

For sales taxes to be applied in each relevant Order/Invoice each sales tax your company collects is setup within Company Settings and also applied to each product and service that is taxable.

Generally Sales Taxes have to be collected based on the location of your company and where you sell to. Please check with your Accountant for what sales taxes will be applicable to your company.

For example, if your business is located in New York State you will have to have the sales tax for New York at the minimum established in your Company Settings and also have that tax applied to each Product and service you are selling to customers in New York.

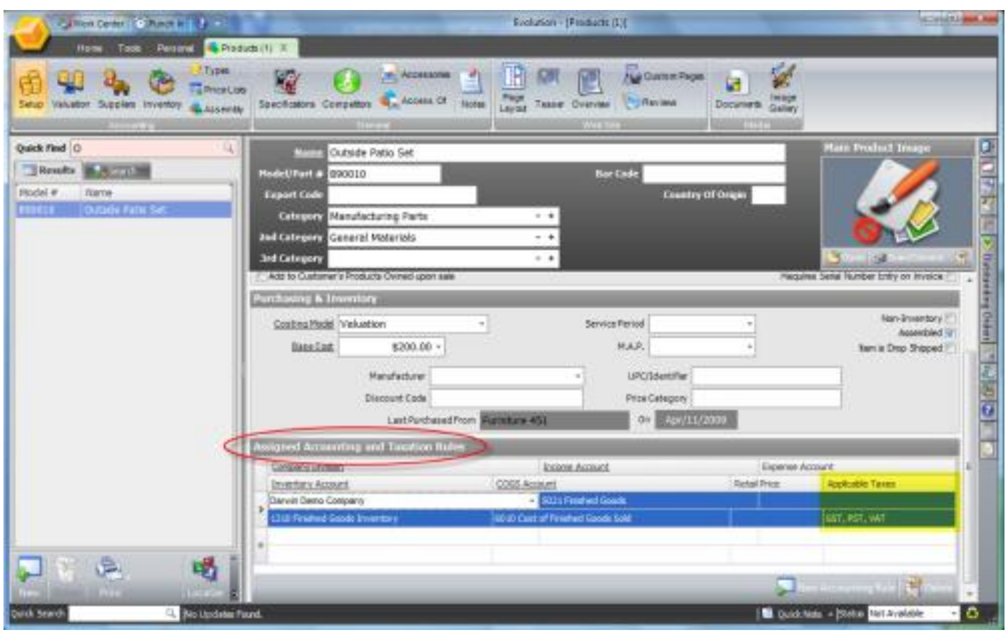
Getting to Sales Tax Settings within a company follows this path from the Home Tab.

Home-→ Tools tab-→ Company icon-→ Divisions-→ Double click on listed Division-→Sales Taxes

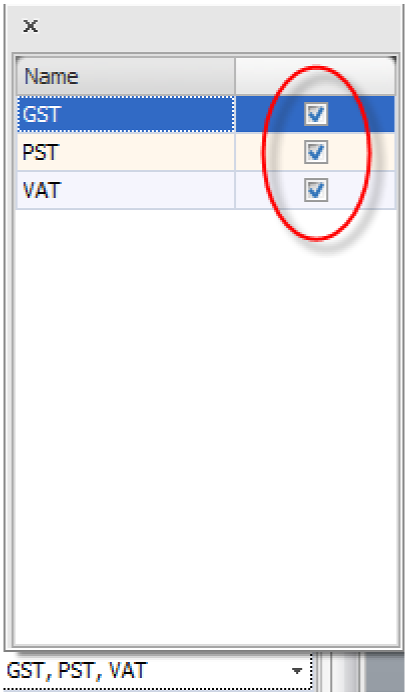
Once the Sales taxes are established in the Company Setting they will have to be attached to each product you have for sale in products.

This allows you to apply Sales Taxes to the Products which will have to have sales taxes collected on and allow others(usually non-Inventoried items and specific services depending on the industry) that may not require sales taxes to not have sales taxes or have only specific sales taxes applied to those Product and services.

Each product listed in Tradepoint can have one or more Accounting Rules and each Accounting rule will have Sales Taxes as a part of that rule.



This example shows only one Assigned Accounting and Taxation Rule present on the listed Product. Applying specific tax rules for a given Product can happen by clicking on the highlighted tax field to check off specific taxes.



Multiple sales taxes are supported within Tradepoint as well as the application to specific products and services.

Sales taxes will then be applied to only orders and invoices where the respective postal and country codes are present.

This allows companies who sell to more than one market to support VAT for the UK and Europe and GST for Canada as well as any relevant sales taxes for applicable states in the US.

As additional sales taxes are added to a Company they will also have to be added to each product to be calculated within orders and invoices.

If your sales taxes are not coming up in orders and invoices then check the following items;

- Make sure the Product has the Sales tax checked off in the accounting rule for the Product.
- Check the Sales Tax in the Company Information to make sure it has been marked as a national or provincial (state based) and has all the information as a part of the Sales Tax rule for the Company.
- Postal Codes check to make sure the zip/postal code is formatted correctly in both the company profile information and in the contact where an order or invoice is listed. ***If the zip/postal codes are not formatted correctly then sales taxes won't pick up properly in sales.***

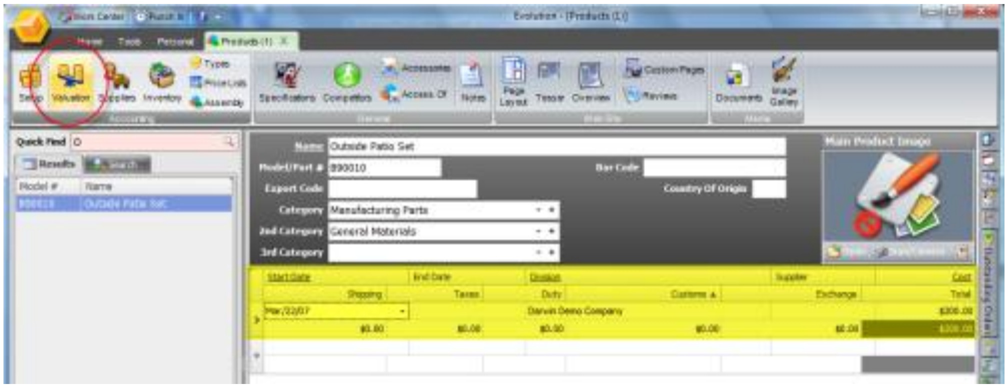
Product Valuations –Benefits and Why they are necessary?

Tradepoint uses product valuations to provide an accounting mechanism for Inventoried items to allow for any necessary depreciation over time and to track additional costs per item that otherwise would not be accounted for.

For example, if a company is selling a product that also comes with literature for instructions and specialized packaging similar to what is used for shipping computers and computer hardware any costs associated with literature, and packaging can also be associated with that main product.

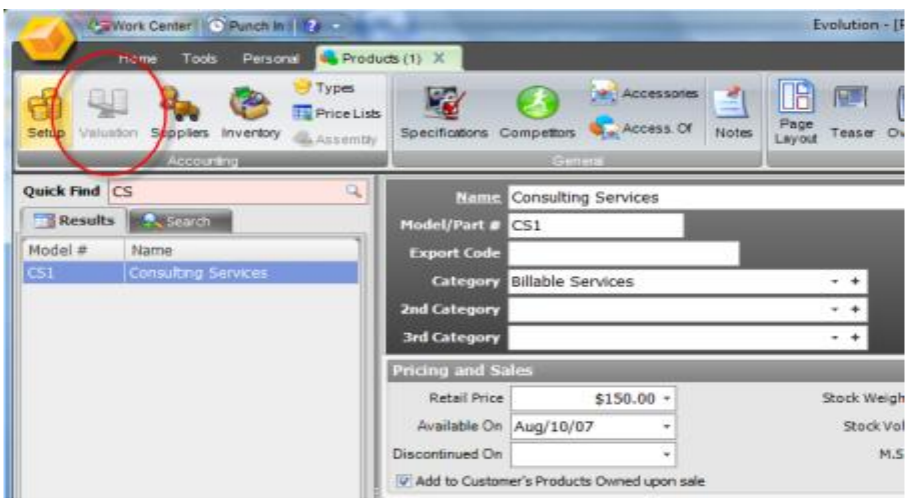
What this means is you have a more accurate picture of the actual costs and resulting profitability built into products instead of taking into account additional costs after the fact or dealing with unexpected losses because costs were not tracked at the level of detail necessary.

Not all companies may necessarily use product valuations however, it is recommended even on services to track costs over time and as sales happen.



Multiple product valuations are supported and can be added to a product using the New Valuation icon.

Product valuations are found in the Accounting settings of products and are required only on Inventoried products. When a product is marked as non-Inventoried the Valuations icon will be grayed out in the tool bar.



Costing Models – Options and Benefits

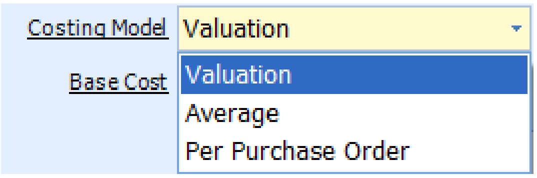
Tradepoint supports multiple costing methods for businesses with frequently fluctuating costs or who need to be able to adjust on a per purchase order basis the costs of the products they are ordering.

The three costing models Tradepoint supports are:

Valuations -

Per Purchase Order -

Average -

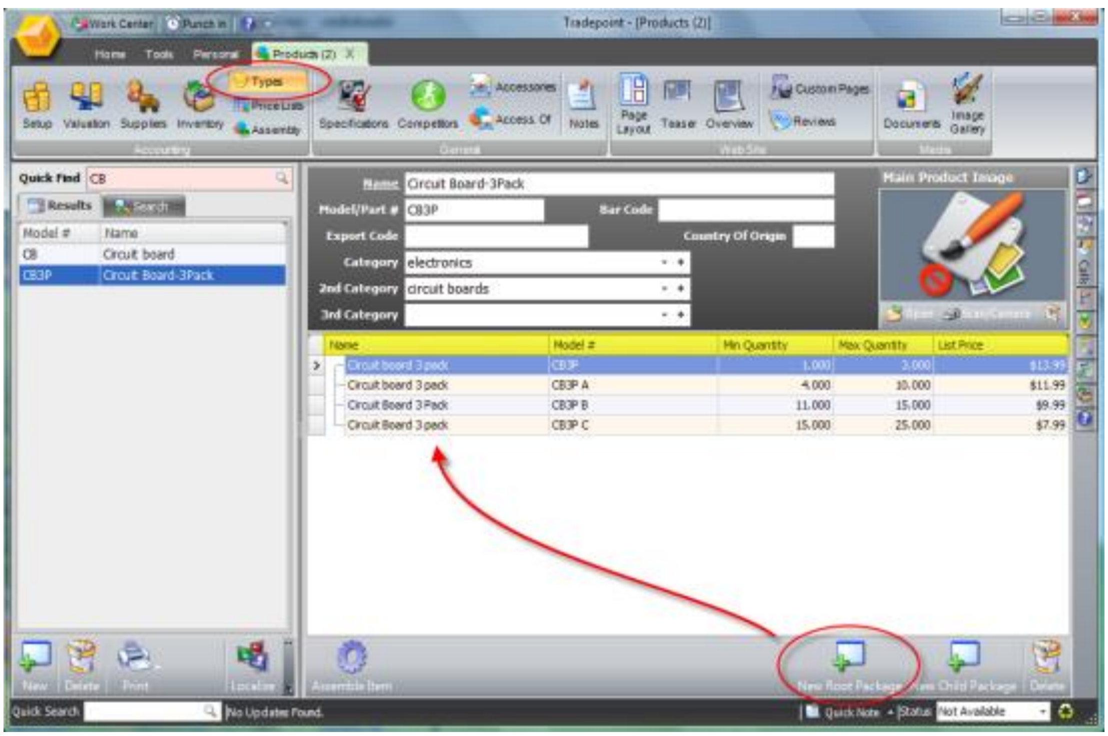


Quantity Price Discounts

Tradepoint supports quantity price discounts (also called 'price breaks') to provide an automatic discount for quantity purchases. When quantity price breaks are applied in Types they will automatically be triggered:

- When an order is created manually.
- When an invoice is created, or results from an order being completed.
- When a web order is being created if one of our Ecommerce solutions are being used.

A product price break in the types of a product will look like the image shown below.

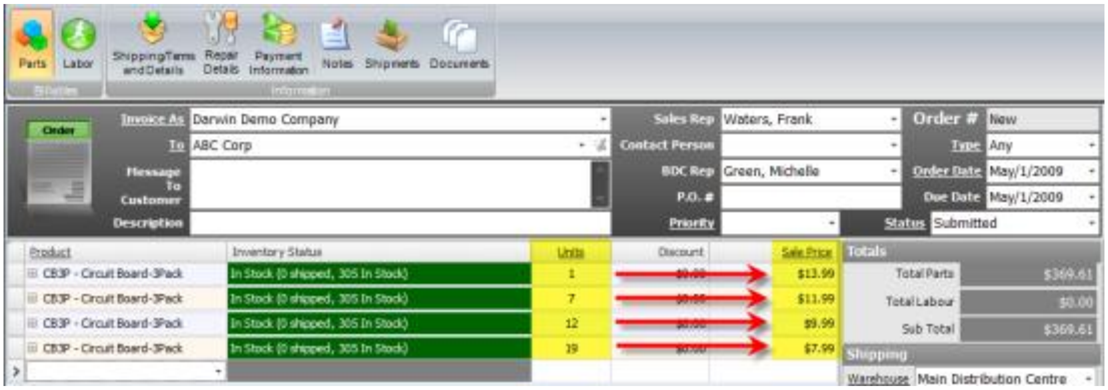


Types can also be used for product matrices and packaging configurations so, the icons are labeled New Root Package and New Child Package. For setting up quantity price breaks click on the New Root Package icon to open a new line.

1. Type in the name of the product and a model number (the model number here can be different that the main model number of the product).
2. Enter in the minimum and the maximum quantities for a given discount level. This means if one quantity price break of 15.99 applies to between an item being purchased at a quantity between 1 and 10, then the minimum quantity being entered should be 1 and the maximum entered should be 10.
3. Enter in the price for that quantity range.
4. Changes will be saved once the screen is refreshed.

Once price breaks are entered for products they will be picked up automatically through the ordering and invoicing process

Within an order the items will automatically pick up the price breaks.



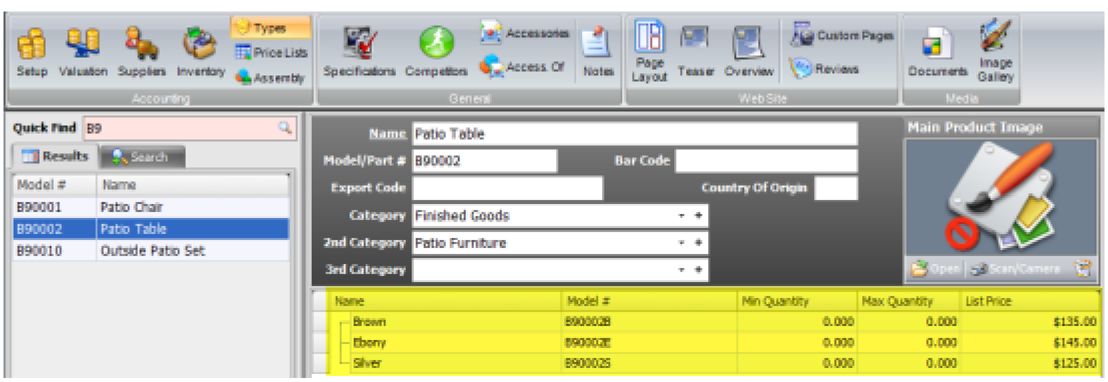
Each of the quantities correspond directly to a price created in types of a product listing. The quantities each reflect an amount within each of the price break discounts set in the product example above.

Quantity price breaks will apply automatically to Ecommerce product listings for display on a website using one of our Ecommerce solutions

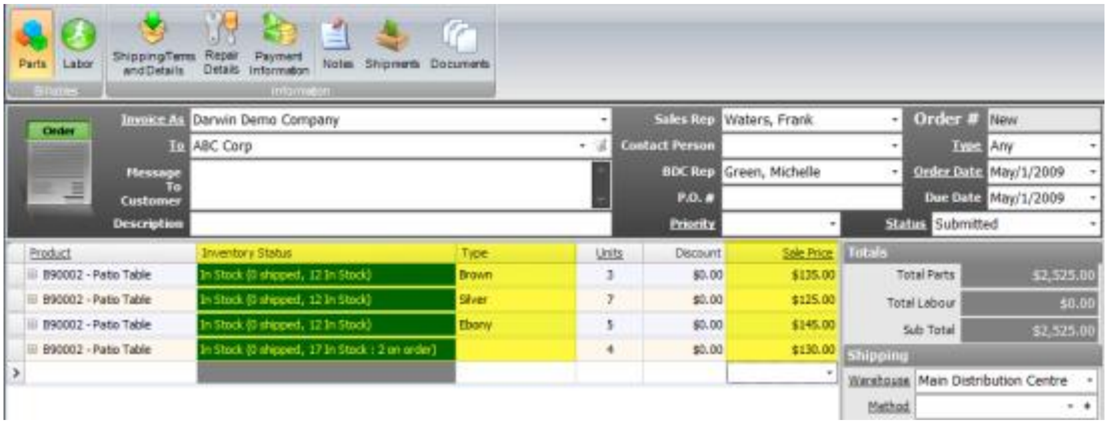
Types: Tools for Product Matrices

Product Matrices are supported through types in each product listing to extend multiple properties per product. This means a product can have different colors, sizes, properties and even prices per type.

Using types to support product matrices will look similar to the example shown below. In this case each product is listed out in types with the product property (in this case color and a price difference) being a part of the listed type.



Once the product matrices are added to types in a product listing they will be available to be added within orders and invoices.



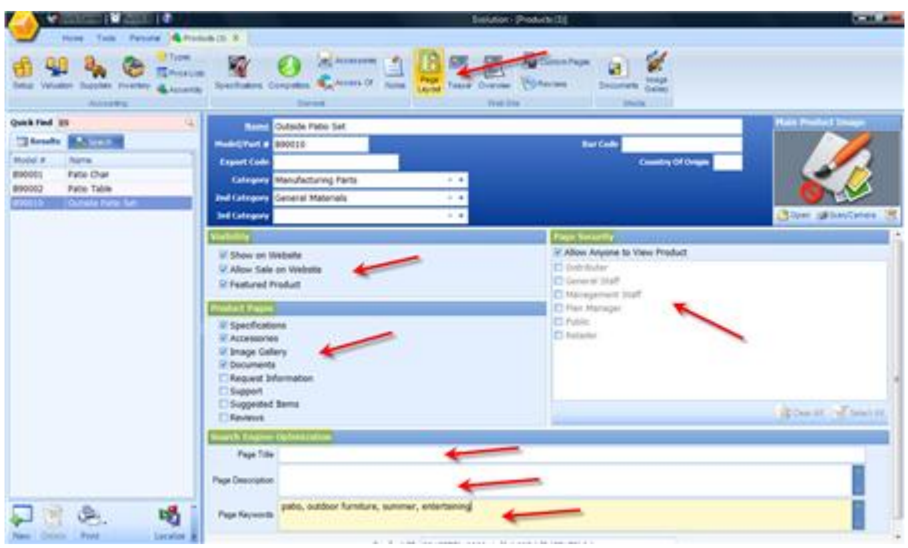
Different products are supported on separate product properties and reflected here within an order.

<u>Note</u>: When using types to support product matrices, remember when orders are being placed a type will be required for each product specified in an order or invoice. If a type is not specified you may see a red dot (hover over the red dot to see what is missing) or hear a sound. If the sound is present then hover the mouse over the header column and choose the column chooser to bring in the types field to the order or invoice

Ecommerce Tools for Product Setup

To setup your website product 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 at least one valuation and at least one product 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.

Your 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.

Your 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.

Your 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 any 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 Tools:

- 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.*

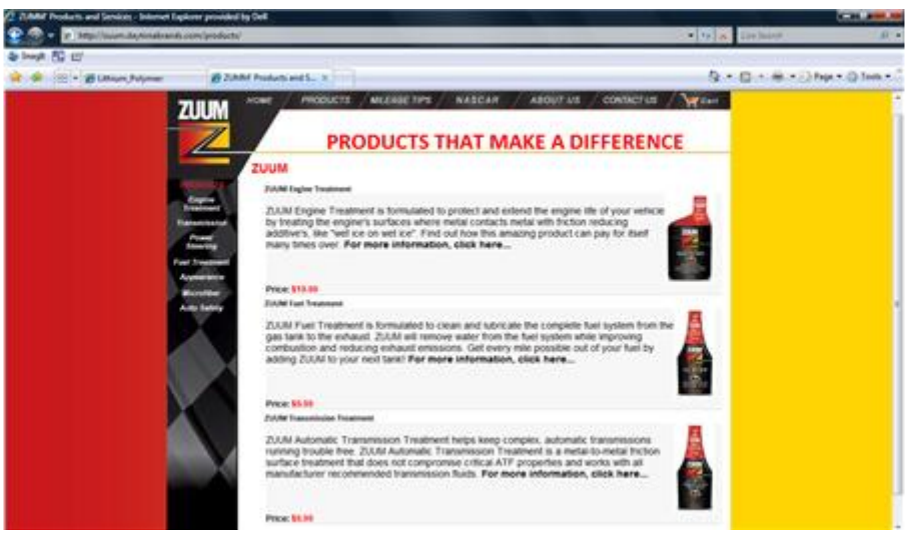
Teaser

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.

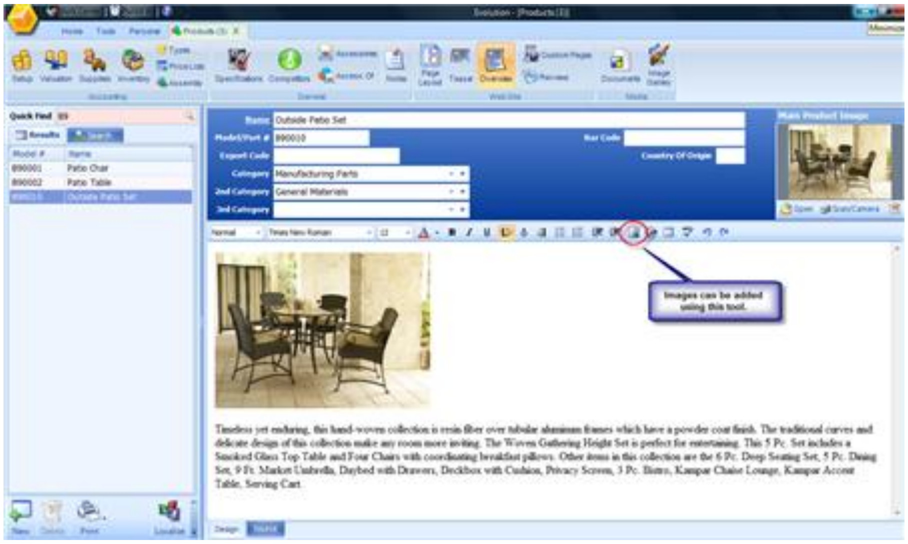
Overview

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.

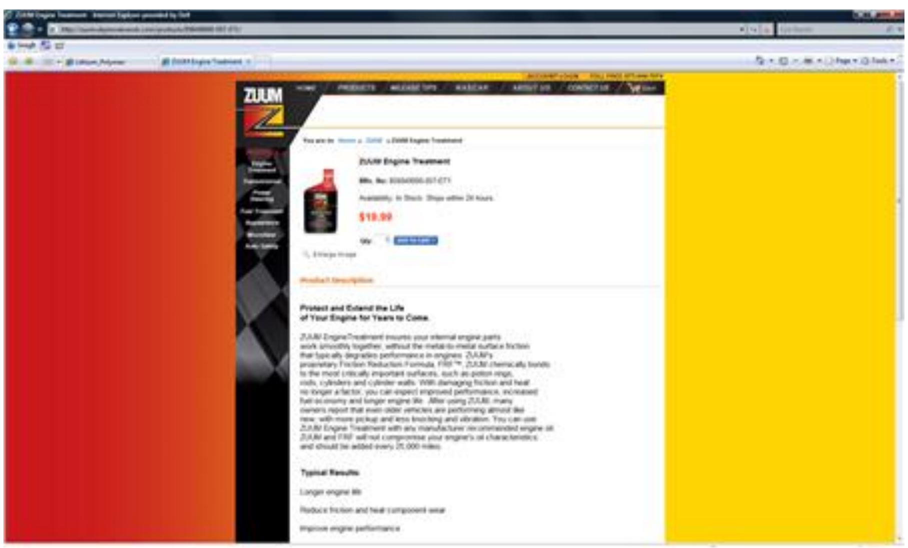
The top section of the editor in both the product teaser and the product overview contains a tool bar for graphic elements. This will allow you to format the text as well as add images to your Product listings in just a few clicks.

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.

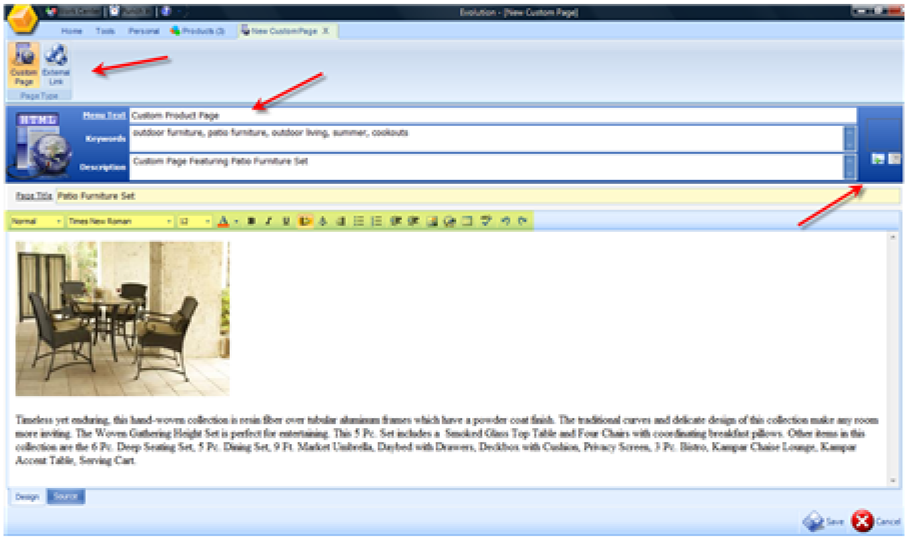


Any content and images that are edited through Tradepoint will also be posted on your website as soon as Tradepoint synchronizes.

Custom Pages:

The custom page 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 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.

Suppliers

Purchase Orders for inventoried Items

Ordering for Inventoried items can happen several ways:

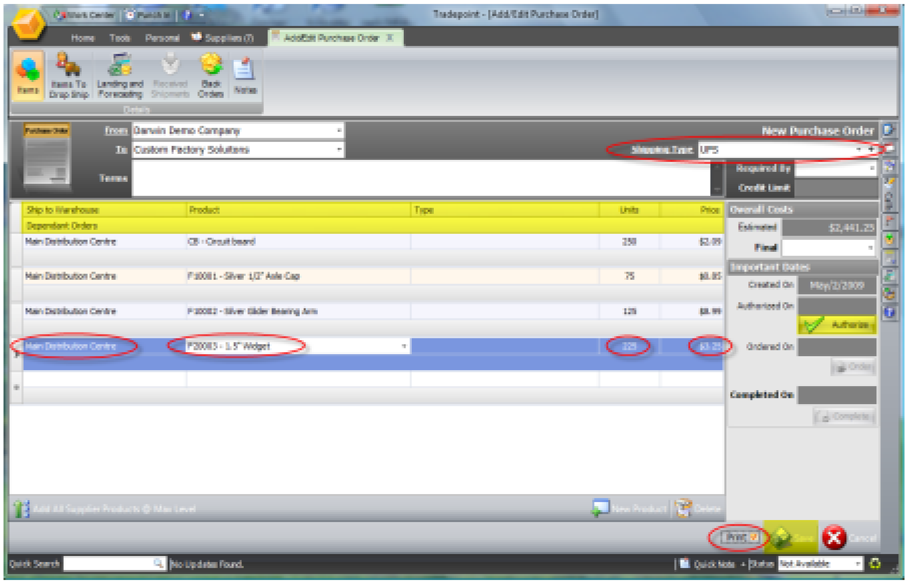
- Through manual creation of Purchase Orders
- Through reminders in the Flyout Panel based on Inventory minimum levels
- Within an Order directly, when more of an item has been ordered than is in Inventory

Manual Purchase Orders

Creating purchase orders directly through the Supplier account is the most direct way of re-ordering products.

Creating a purchase order can be done through any Customer, Reseller, or Supplier contact from the purchase order icon. Click the New Purchase Order icon in the lower left corner to open a new purchase order.

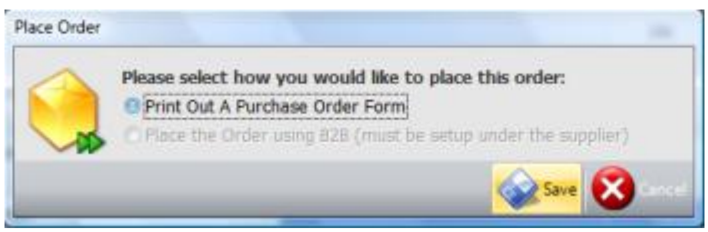
The purchase order screen is shown below and only a few required fields to be completed.



The required fields for a purchase order are:

- Shipping type
- Warehouse
- Products
- Quantity

Check off the Authorize and then an order authorization prompt will appear to print the purchase order.



When the Save option is clicked the print preview screen will pop-up with the option to print and email the PO. When the print option is chosen the PO will automatically be saved. When the PO is not printed at the time it is created then the PO will need to be saved independently.

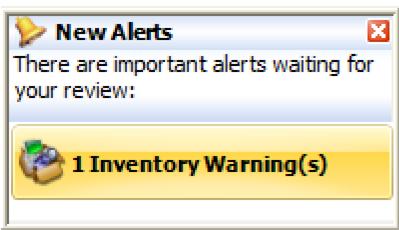
Purchase Orders Generated from Flyout Panel Reminders

The second way to generate POs for inventoried items is through reminders from the Flyout Panel based on minimum inventory levels set for products.

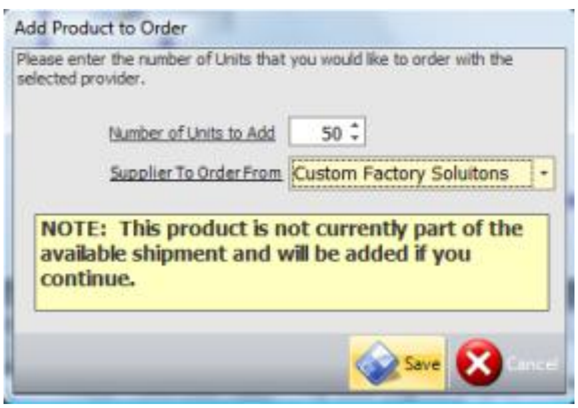
When Products have minimum inventory levels as part of the product listing, alerts for POs will be created in the Flyout Panel as those minimums are reached as orders are processed.

Product Max/Min levels are entered in a Product under the Inventory icon. Product Max/Min levels can be imported into products for convenience.

Once a Product's minimum level is achieved then an Inventory Warning will be generated within the Flyout Panel.



A pop up in the lower right of your screen in Tradepoint will pop-up. A prompt will pop-up to add the amount to be ordered and choose the Supplier (this will *NOT* pop-up if there is a preferred Supplier already setup under the Product).

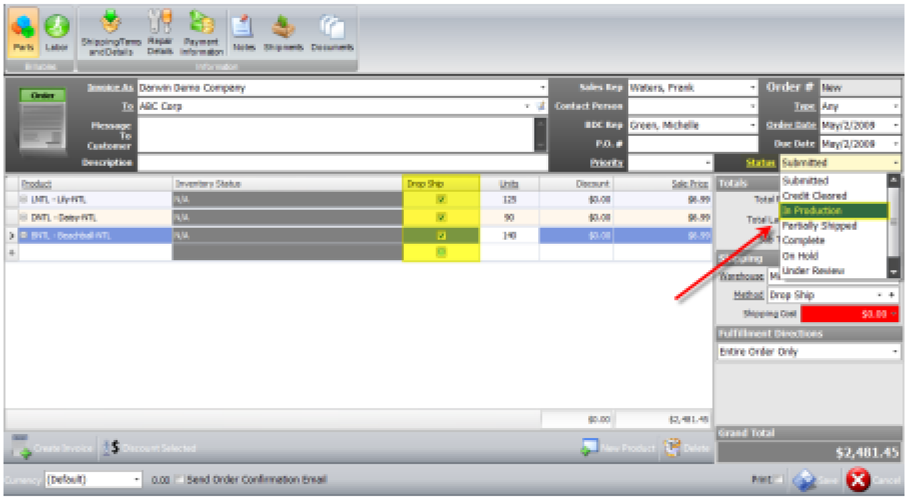


Click on the Save icon to create the PO. The PO will be generated under the Supplier account by date. The status will be 'Authorized' in the listed POs in the Supplier account.

Double click on the PO and then click the Print option to reach the print preview screen to email or print out the PO to send to the Supplier.

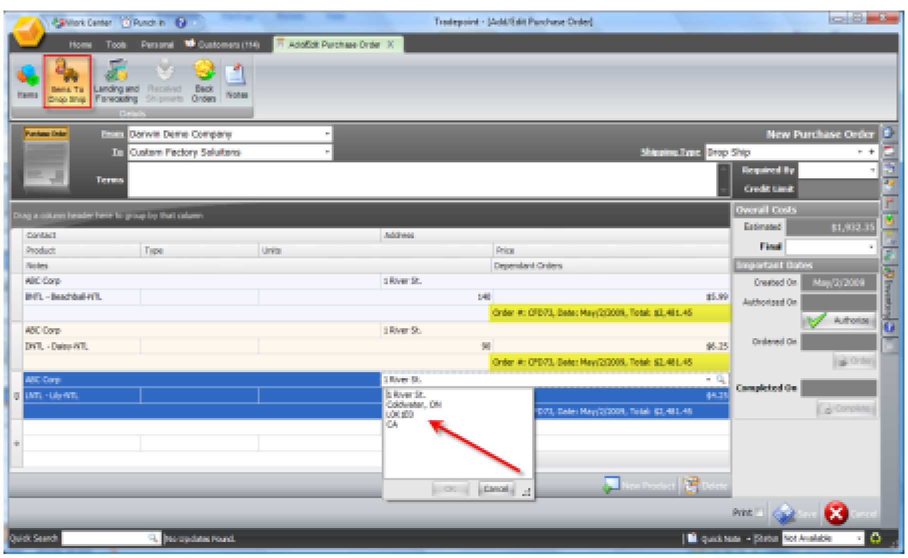
Purchase Orders for Drop Shipped Items

Products which are set as being drop shipped will have an option as part of an order for Drop Shipped items. When checked off in an Order this option will create a PO when an Order is saved as ***'In Production'*** or ***'Complete'*** at the time an Order is created.



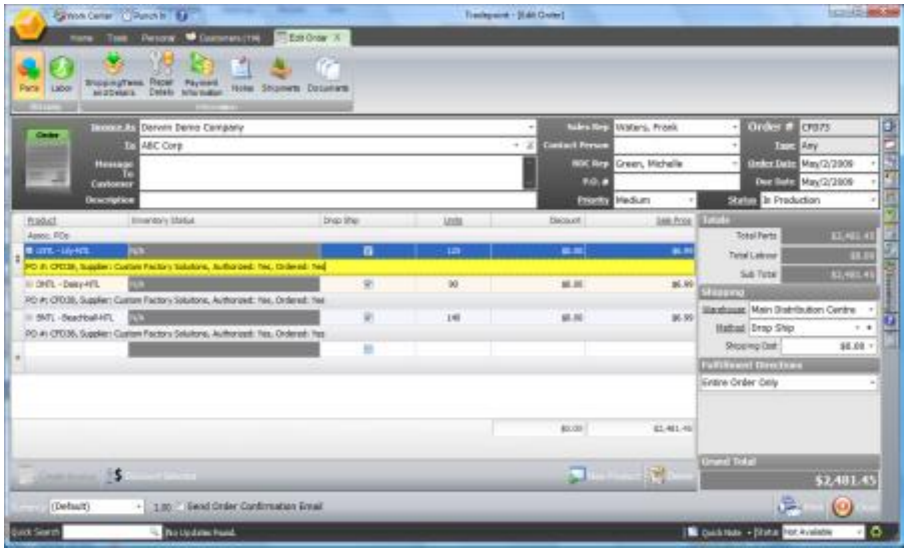
If the drop ship option is not showing up in your header field then right click on the header field to use the Column Chooser and drag the Drop Ship option into the header field. If your Products are pre-set for Drop Shipping then these check boxes will be checked off. If not then the option to Drop Ship even for a single order can be done by checking off the Drop Ship option.

Once the drop ship order has been put into the 'In Production' status and saved then the PO will pop up(or multiple POs if each Product has a different Supplier set-up under each Product).



The PO will have the originating order information on each line item of the PO. A field for the shipping address is also present with a search tool. Shipping addresses can be edited from the PO screen and any changes will show up in the PO print preview screen.

Once the PO is Authorized and then Ordered the associated PO information will appear within the originating order to track each drop shipped order with its respective PO.

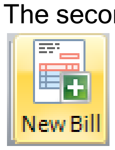


From this point on further communication from the Supplier regarding shipping information of the drop shipped order is necessary for further tracking of drop shipped orders.

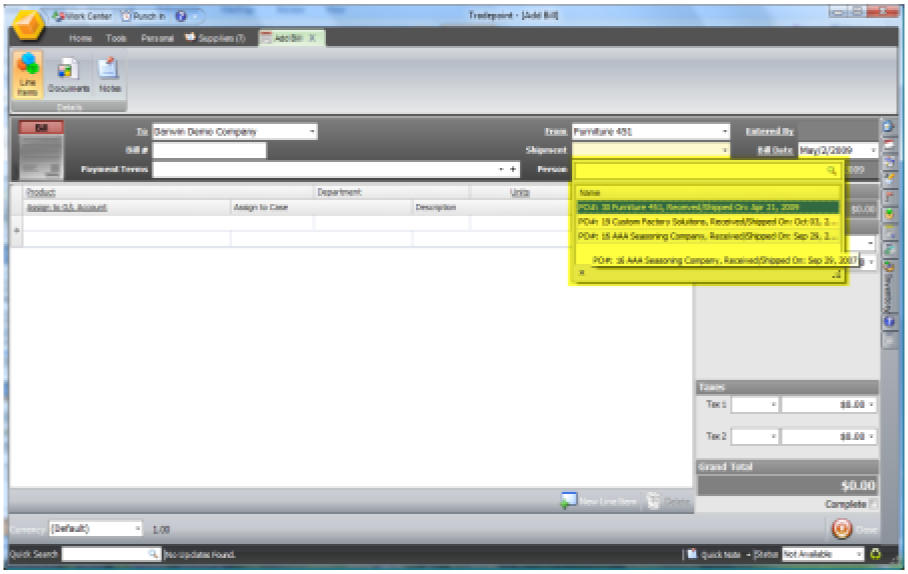
Creating a Bill

Bills can be created in two ways. The easiest way is to always check off the option at the end of the receive shipment wizard to automatically create a bill for the items being received. This way even if a partial shipment is received the bill is already created.

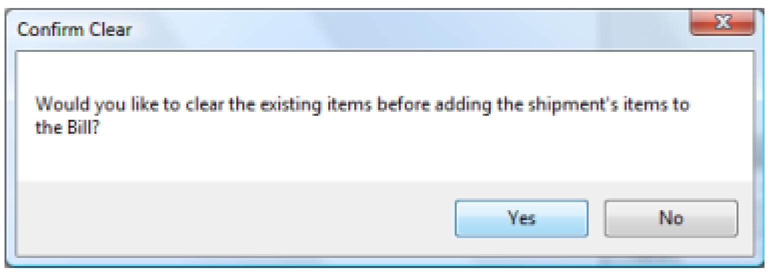
The second option for creating bills is within a supplier's account. Under the Bills section click on the 'New Bill' icon.



From the new bill window active POs can be chosen from a drop down menu to pre-populate the bill with all the items on that PO.

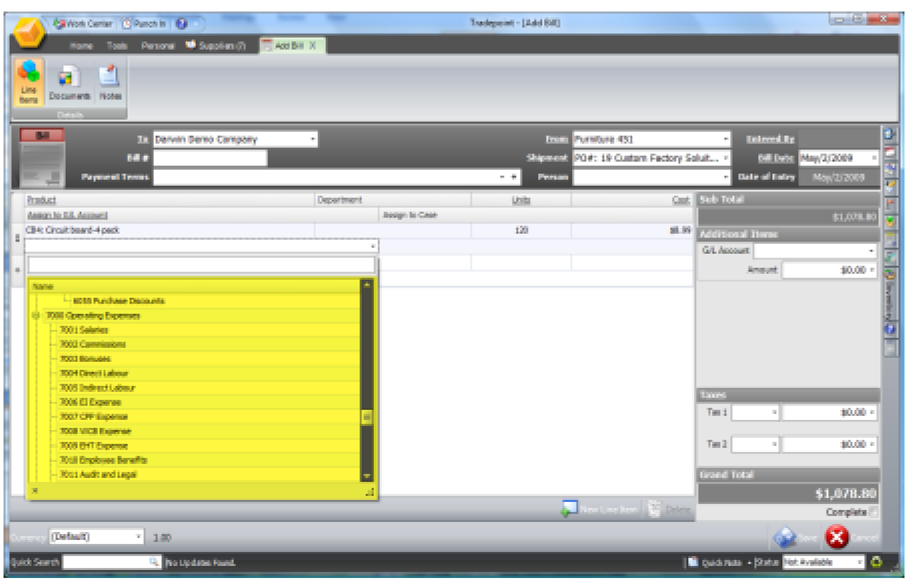


Once a PO is chosen you will be prompted to clear any items already on that PO.



Most of the time the answer will be yes since the option to create a bill directly based on a PO is preferable to have the bills and POs match.

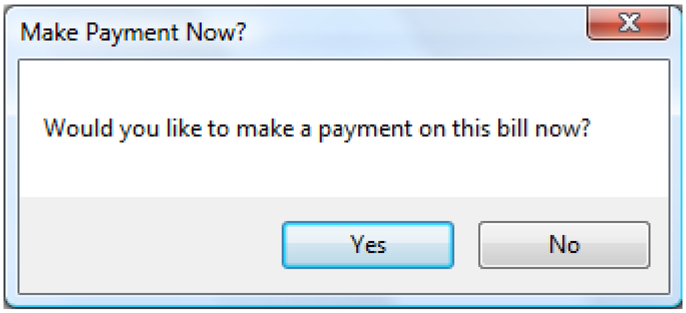
Next choose the G/L account to associate the bill with form the drop down field.



Choose any taxes and if these are all the items going on a bill then complete the bill and click save. The next prompt will be to make a payment on a bill.

Adding a Payment to a Bill

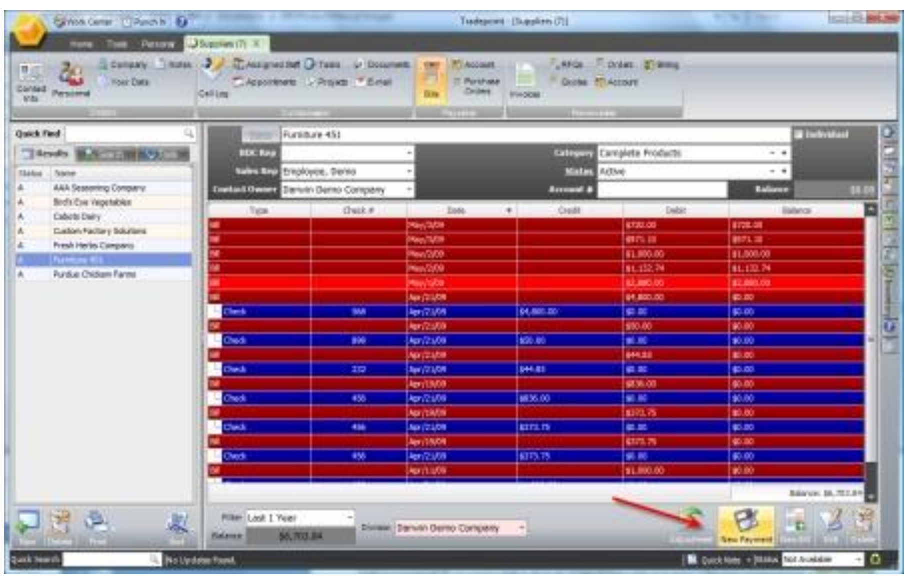
Payments can be added to bills at the time they are completed or at a later date. At the time a bill is completed the prompt for payment will pop up.



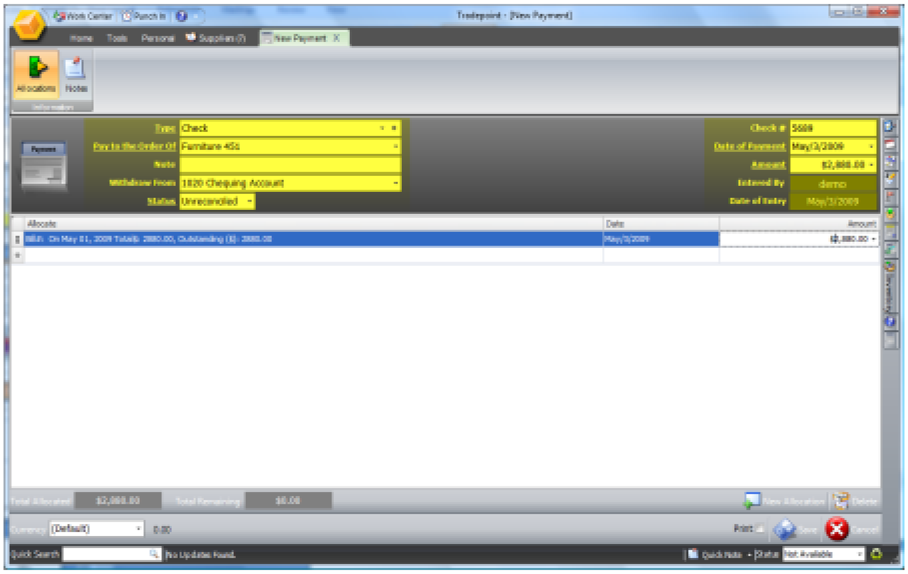
If payment is not made when prompted then it will have to be applied later.

Adding a payment is done from the Bills window in a supplier account ***(bills can also be added to customer and reseller accounts).***

Adding a payment to an existing bill is done by highlighting a bill and clicking the new payment icon. 



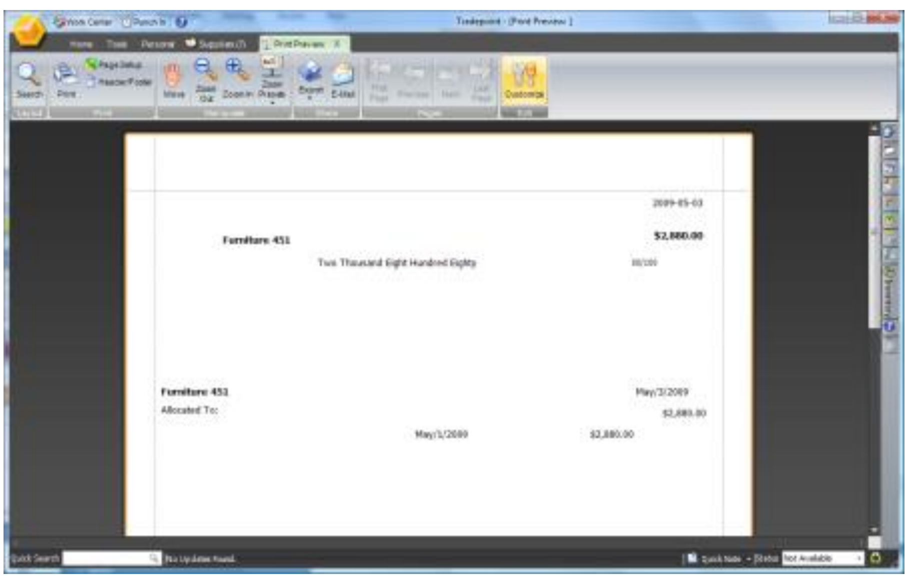
The next screen that will open is the payment screen to add and complete the payment to a bill.



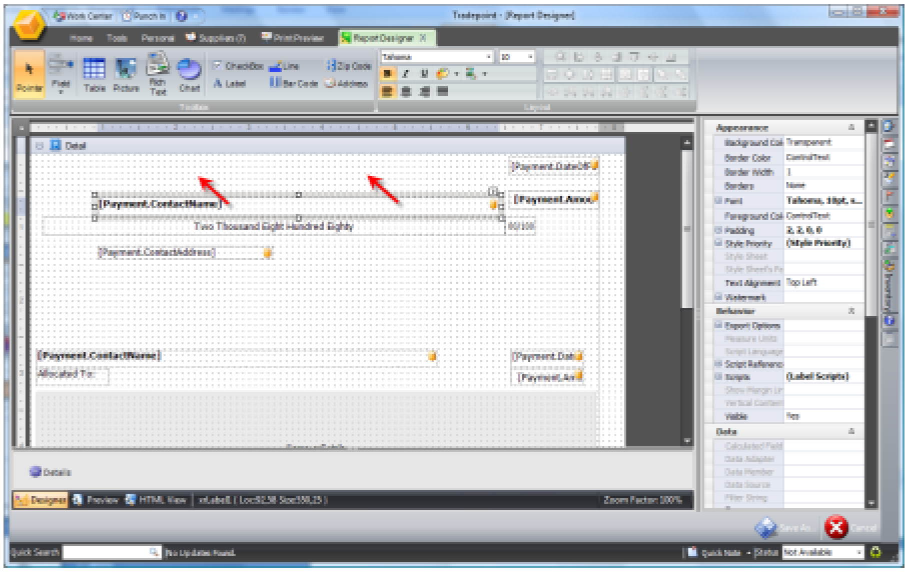
The bill information will be pre-populated in the payment window with the only items needing to be specified being:

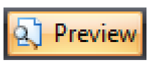
- Payment type (with the ability to add payment types with the plus button)
- Any Note (if applicable)
- Choose a different account to withdraw funds from (other than the pre-populated account)

If a check is being printed out as payment for a bill, then check off the Print option and click the save icon. The next screen will be the print preview screen for the check template.



When any of these fields need to be adjusted to line up properly with a printer then click the highlighted customize icon. The next screen will enable you to move fields around to adjust the fields to be able to print out a check.



Adjusting any of the fields can be done by dragging and dropping the, on different locations on the screen. A Preview icon 

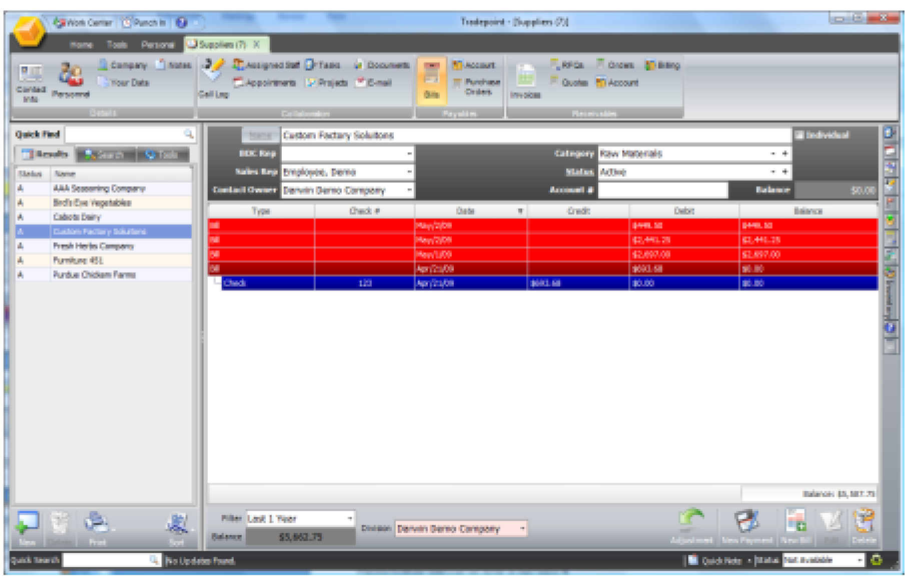
will allow the preview of the check to be viewed before saving it. The Save As icon 

in the lower right will save the check template with the option to rename that template. The Save As option also allows for multiple check templates to be saved if necessary.

Paying Multiple Bills at Once

Paying multiple bills can be done in two ways.

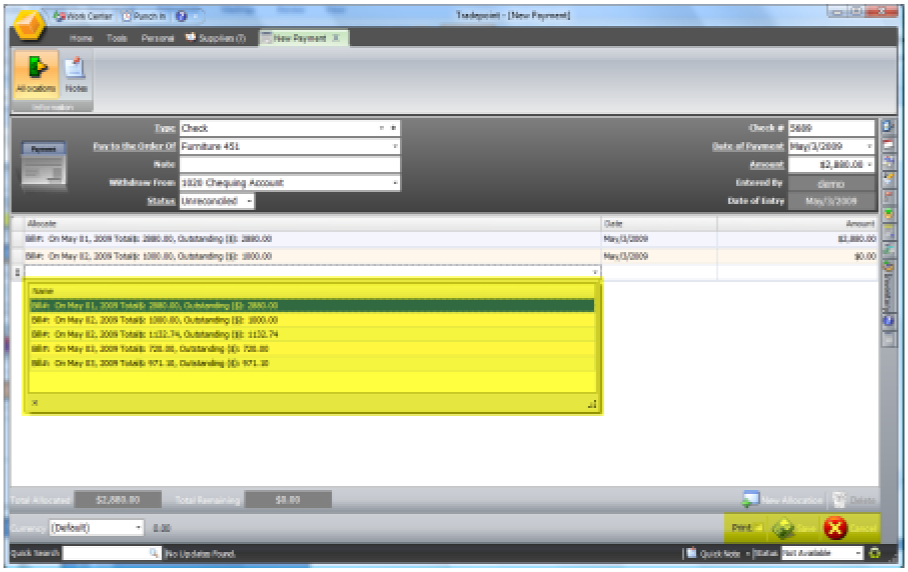
1. From the bills screen of a supplier highlight all bills that a payment will be applied to.



To highlight multiple bills hold down the Control key and click on each bill to apply a payment. For a long list of bills click on the top listed bill and hold down the Control and Shift keys and click on the last listed item to highlight all bills.

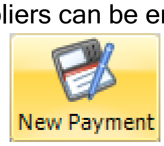
Click the New payment icon to complete the payment and apply it to all relevant Bills.

2. From a New Payment screen existing bills will appear in the drop down line item so all or specific bills can be chosen at the time a payment is being completed.



Click the save and/or print option if a check is being printed out for payment.

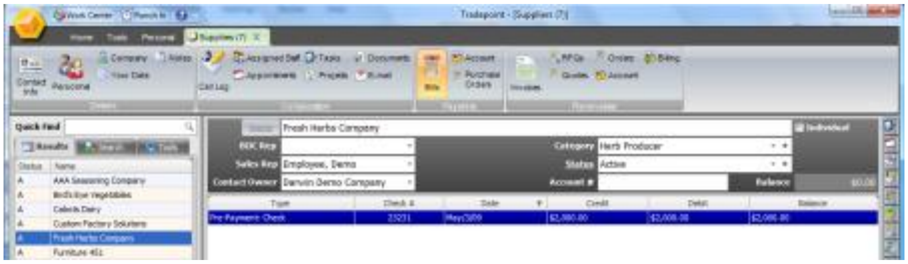
Supplier Prepayments – for items not yet received

Pre-payments for suppliers can be entered in as a new payment under the bills section of a supplier account. Click on the new payment icon. 

When the payment screen opens fill in the information for the pre-payment. The amount of the pre-payment goes in the allocation field highlighted below.

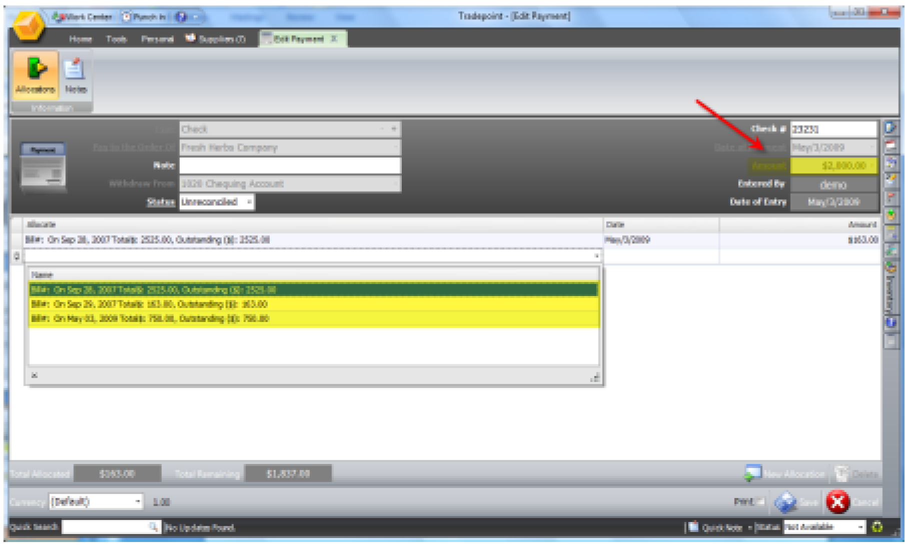
Click save and the pre-payment will be saved under the supplier account.

To apply a pre-payment to one or more bills click on the pre-payment in the bills section. It will be listed in blue in the bills section of a supplier account.



Clicking on a pre-payment will open the payment screen with the pre-payment amount already allocated pre-populated in the payments windows. The pre-payment amount will be entered in the highlighted field below.

To apply existing bills to the pre-payment click on the allocations line item to bring up a list of existing bills. Click on as many as the pre-payment should be allocated to and click save.



Bills the pre-payment is applied to will be listed in the bills section along with any additional balance left over.

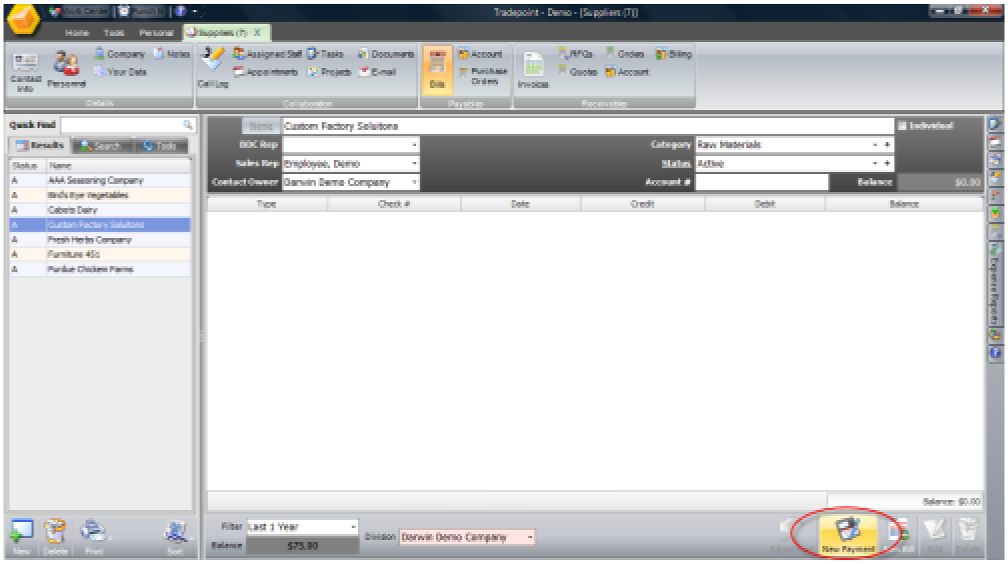
The bills screen will show any remaining balance from a pre-payment or any bills still remaining as well as line items with no payments attached.

Credit Memos – Applying a Credit to a Supplier Account

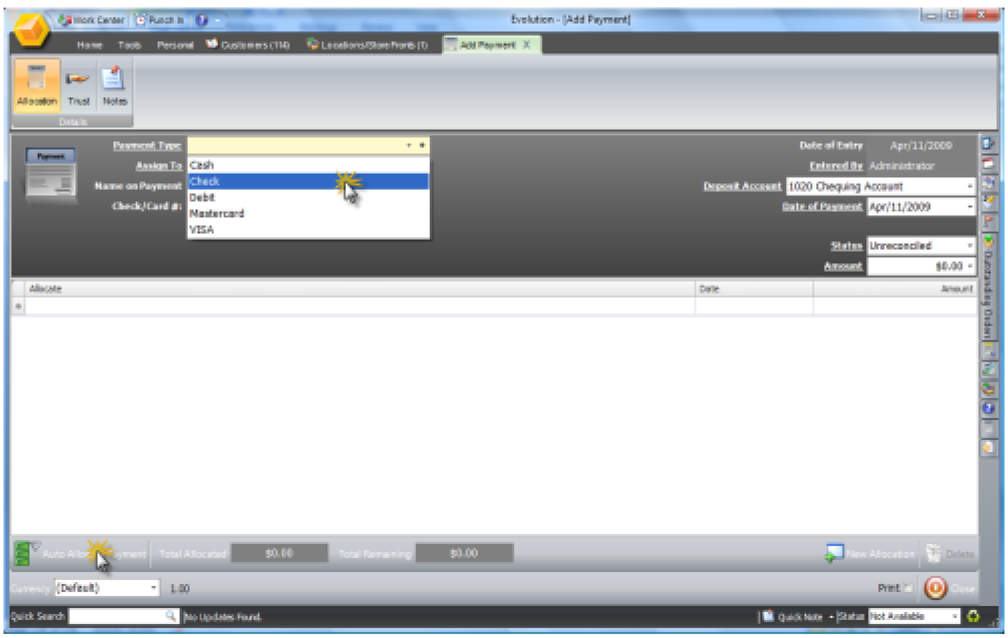
Applying a Credit Memo to a supplier account follows the same process as accepting a Deposit/Pre-Payment to a Customer account

To be able to apply a credit memo a Trust Account will need to be setup in the General Ledger. A trust account is where all credit memos, deposits, and pre-payments will be allocated until a time as they are assigned to a particular Invoice against a payment.

From the Bills screen click on the New Payment icon.



On the payment screen be sure there are no allocated items listed.



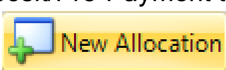
Check off the payment type. Click the Save icon. Check off the print option if a receipt of Deposit needs to be emailed to the customer.

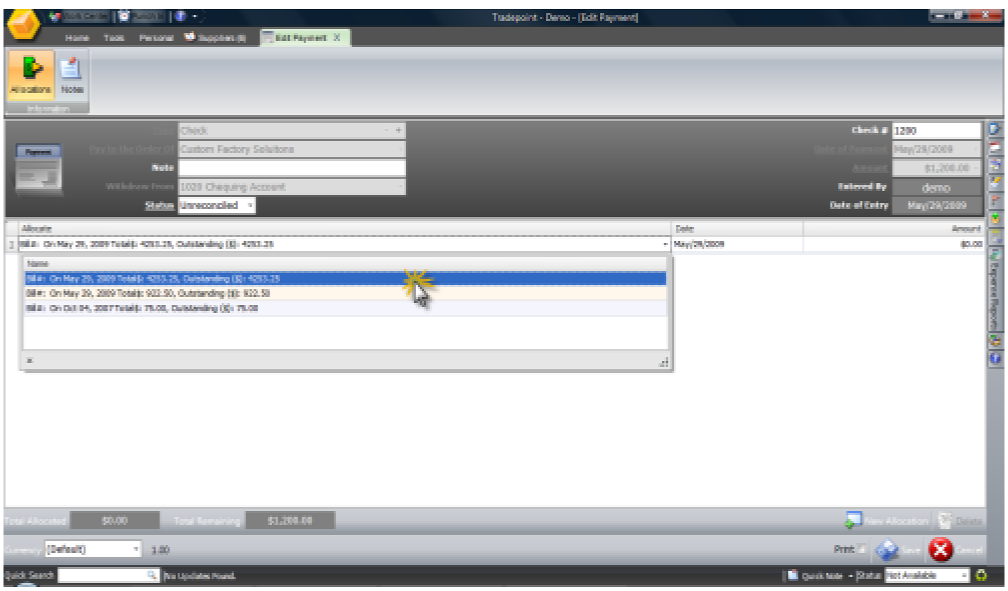
The credit memo will appear in the Bills screen, highlighted blue and be labeled Deposit/Pre-payment.

Apply a Credit Memo to a Bill in a Supplier Account

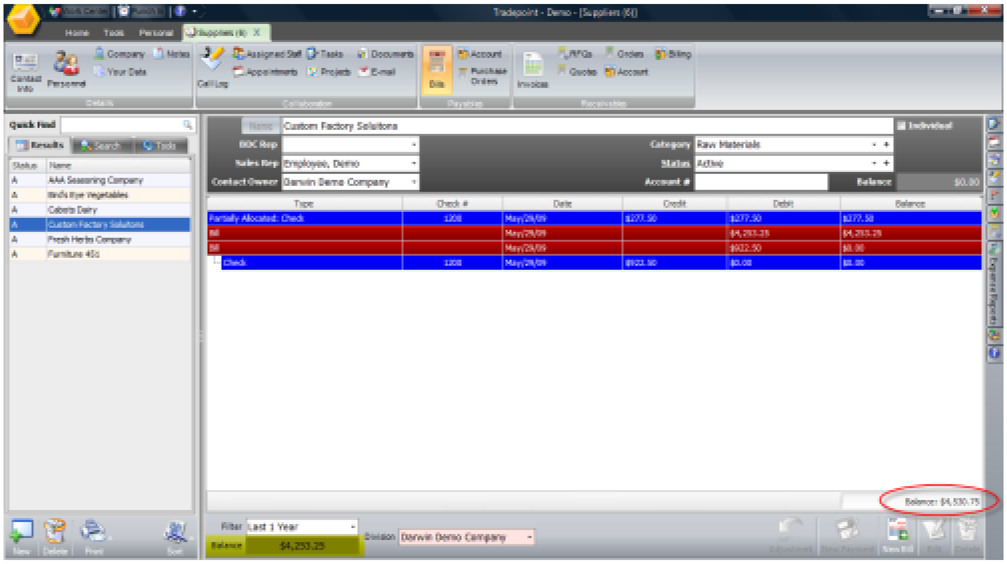
To apply a credit memo to an incoming bill for a Supplier go to the Bills screen and double click on the blue credit memo or pre-payment..

The payments screen will open with the pre-payment information already populated in the fields.

Choose from the drop down menu the bill/s the Deposit/Pre-Payment will apply to and Click the Save/Print options to apply the Deposit/Pre-Payment to an Invoice. Use the new Allocation option to apply a credit memo/pre-payment to a Supplier Bill. 



The results will appear just like an Invoice with a payment applied. Any additional balance will appear at the bottom of the bills screen and in the P/D Balance column.



Reporting – My Business

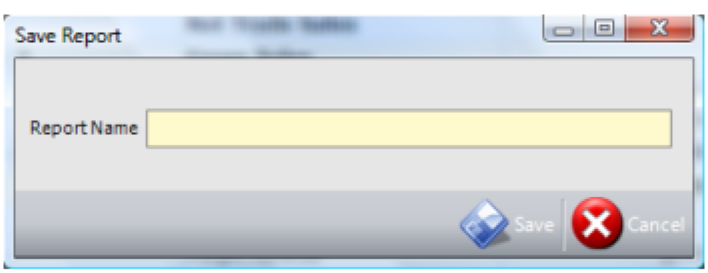
My Business reporting includes hundreds of reports on data from all aspects of business activity. All of the reports in My Business are template with the ability to refine search options and save reports based on specific criteria to be accessed later.

All reports in My Business include multiple features such as an Export to Excel feature, the ability to email or export the report in several different file types from the print preview screen, column choosers to add and remove fields from the header field of the report and a Save As feature to save a report with additional details specified in the search filters.

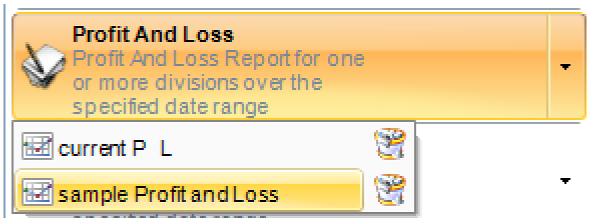
Save As Feature

For running multiple different types of reports the Save as feature allows specific preferences to be saved for a given report. These could be financial reports for different Divisions or with different date ranges.

The Save As feature is in the lower right. Clicking on it will bring up a pop-up prompting for a name for a report that will then appear as a drop down option for a given report.



Type in a name for the report into the Save As option. Refresh the screen and an arrow will appear next to a report. Choosing that option will rerun the report with any specified details.



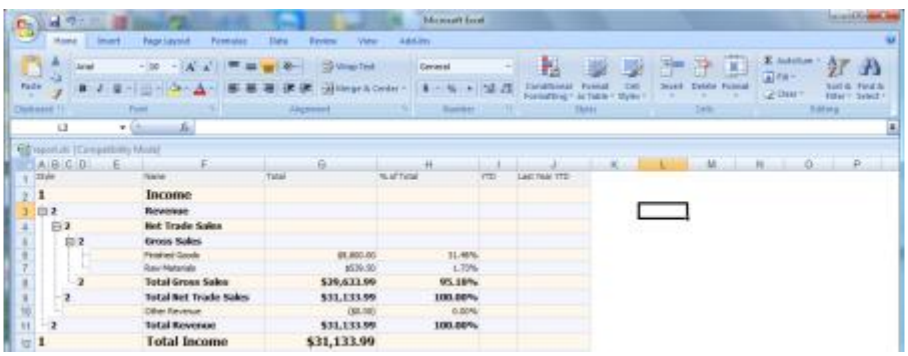
Export to Excel

The Export to Excel feature will export any report into an Excel spreadsheet. Clicking on the export to excel option

will prompt the report to be saved to a location on the machine being used. Once that location has been specified the report can be found there and opened.

The export to excel option does create reports formatted as they appear when they are generated in Tradepoint. This means that there may be merged fields or other formatting to reflect the appearance of the report generated in Tradepoint.

Tradepoint will work with the existing version of Excel you have on your computer. This is an example of a report saved in Excel 2007.



The print preview option is where the email option and file export options are found. Once a report has been generated clicking on the Print preview option in the lower right will open the print preview.

The file export and the email as a PDF option are accessible through the icons at the top of the page.

Clicking on the Export option opens a drop down option with a list of files to export the report in.

The email opens an email window with the report added as a PDF attachment. ***There must be an active email account on the login being used for the email as a PDF option to work.***

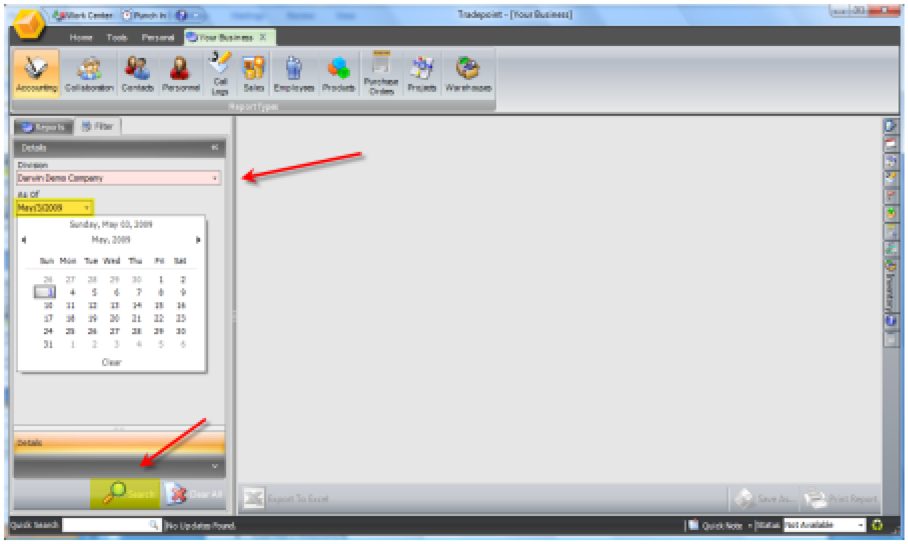
Financial Reports

Financial reports include basic accounting reports and detailed reporting for accounts receivable and accounts payable. Accounting reports include:

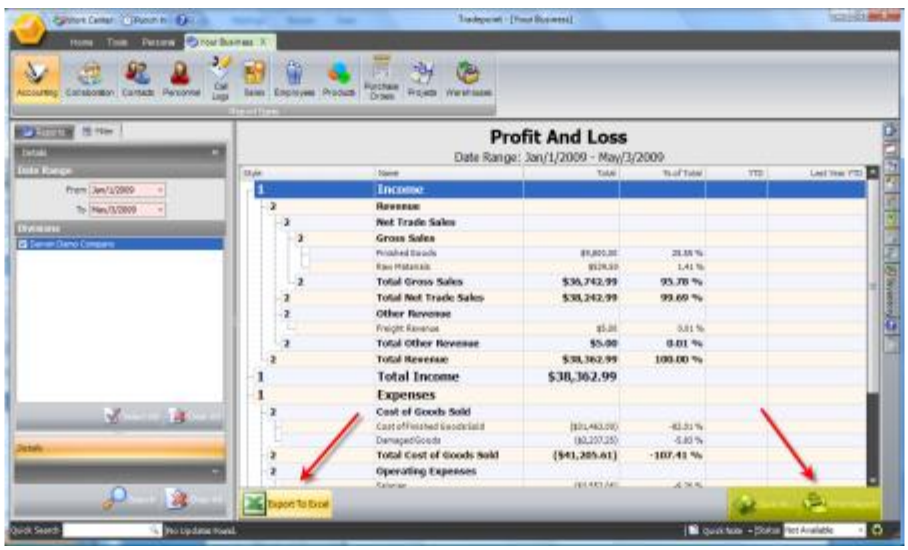
- Trial balance
- Income Statement
- Profit and Loss
- Balance Sheet
- Outstanding Accounts Payable
- Outstanding Accounts Payable Detailed Aged
- Outstanding Accounts Payable Current
- Incomplete Bills
- Outstanding Accounts Receivable
- Outstanding Accounts Receivable Detailed Aged
- All Current Accounts Receivable Aged
- All Current Accounts Receivable Detailed Aged
- Incomplete Invoices
- Pre and Partially Allocated Invoices

Clicking on any one of the icons listed on the left will open the search filter options for those reports.

Financial and accounting reports will have the ability to search across multiple divisions and adjust the date in the window if the date range being searched on starts from a different date.



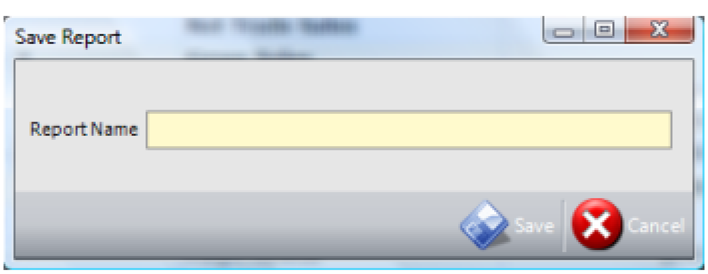
The search icon will generate the report. Once the report has been generated other options will appear on the screen.



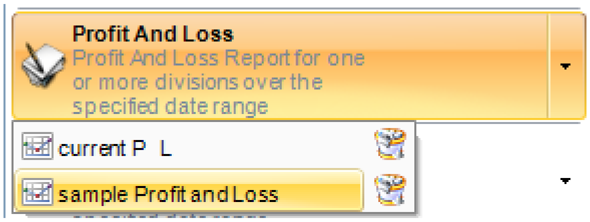
The Export to Excel option is in the lower left and will automatically create an Excel spreadsheet. A prompt will pop-up for the location of the spreadsheet and will be created shortly afterwards. Excel spreadsheets are created with formatting including merged fields

The Save As option will allow a particular report to be saved including any additional search parameters part of a report.

Once the Save As option has been clicked a window will pop-up prompting the report to be named.



Once the report has been named refresh the screen and an arrow will appear to the right of the named report holding any additional reports that have already been created.



Choosing one of these options and clicking the Search icon below will generated the report with the preferences already in place.

Collaboration Reports

Collaboration reports cover activity from appointments, tasks and emails. Reports for these activities include:

- Appointment List
- Appointment by Category
- Appointment by Status
- Appointment by Attendee
- Task List
- Task by Category
- Task by Status
- Task by Attendee
- Email
- Email by Sender

Each of these reports will have additional filters to further specify details in a given report. All the previously mentioned features for using the right click to access the column chooser tool to drag and drop different fields in or out of the header field, exporting as a different file type, printing and exporting to excel will also apply to these reports.

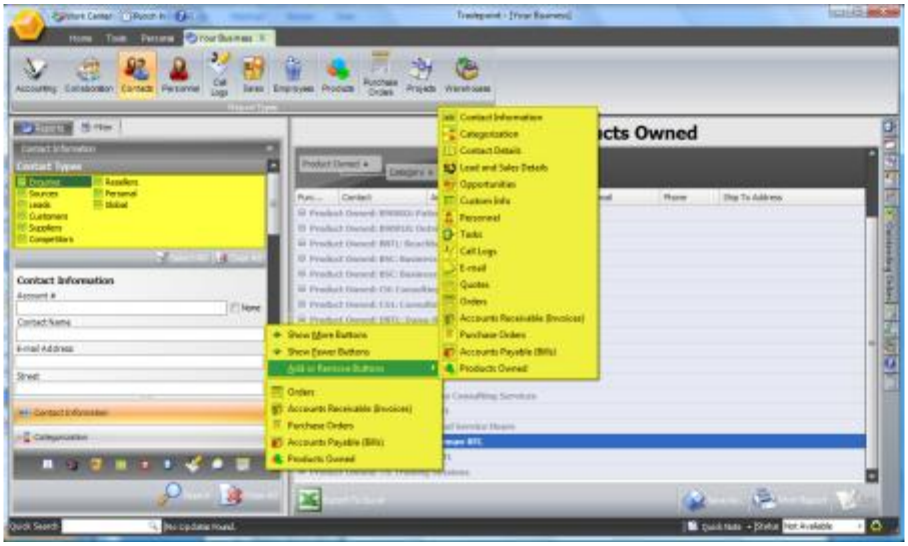
Contact Reports

Contact reports include options to print out different reports of contacts including labels and envelopes.

- Contacts by Category Detailed
- Contacts by Status Detailed
- Contacts by Territory Detailed
- Contact Breakdown
- Contact List
- Products on Loan by Contact
- Avery 5162 Labels - Company Only
- Avery 5162 Labels - All Personnel
- Size 10 Envelopes - Company Only
- Size 10 Envelopes - All Personnel
- Contact Products Owned - Reports the purchase history of contacts within a given date range.

Options for contact report do include the ability to create detailed reports with additional preferences within search filters reflecting the information available within contacts.

The search filter screen reflects the complexity in information held within contacts. Icons below show the ability to set in-depth search filters. For users on lower screen resolutions an icon at the lower right will open up different options for in-depth search filters through the pop-up menus highlighted in the example below.



Personnel Reports

Personnel reports are intended to provide reporting capabilities for personnel contacts within the CRM of Tradepoint. Companies using Tradepoint who mainly have B2C or individual contacts will not use this reports section.

- Personnel List
- Personnel by Company
- Avery 5162
- Size 10 Envelopes-All Personnel

Personnel reports do allow for reporting across different Divisions and Companies listed as a part of company information.

Call Log Reports

Call log reports search on call log activity with filters for specific call activity. Ideal for tracking the status of service calls within Tradepoint.

- Call Log Details
- Call Logs by Category
- Call Logs by Status
- Call Logs by Product
- Call Logs by Responsible

Sales Reporting

Sales reporting options include a wide variety of reports covering the sales process from start to invoicing. Existing sales reports include:

- Opportunities by Sales Rep
- Opportunities Summary
- Outstanding Quotations
- Outstanding Quotations by Sales Rep
- Orders
- Orders by Contact
- Orders by Sales Rep
- Orders by BDC Rep
- Orders by Fulfilled
- Orders by Referred by
- Shipments by Order
- Customers Purchasing Product
- Invoices
- Complete and Incomplete Invoices
- Sales by Product
- Sales Margin by Sales Rep
- Sales Margins by Referral
- Sales by Sales Rep
- Sales by BDC Rep
- Sales by Referral
- Product Sales by Referral
- Sales by BDC Rep
- Affiliate Reimbursements

Employee Reports

Reporting on Employee information and activity within Tradepoint can be done through these reports. Ideal for reporting on different information within a company's work for the Employee reports have all the features available in My Business reporting.

- Employee List
- Employee List by Position
- Billable Hours by Employee
- Billable Hours by Case Employee – Reports on hours expected to be billed by Project
- Work Load – Reports on Projected Hours(time that has NOT been worked yet for Projects
- Products on Loan by Employee
- Appointments by Employee
- Tasks by Employee

Products

Product and Inventory cover information and activity on your Products and Product activity. Ideal to see a wide range of activities happening involving products and assets (any product you may loan out to Employees or contacts).

- Product Listing by Category
- Product List
- Products by Category
- Products by Supplier
- Customers Purchasing Product
- Products on Loan Detail
- Overdue Products on Loan
- Products on Loan by Product
- Products on Loan by Employee
- Products on Loan by Contact

Basic inventory reports can be accessed through Warehouses (accessible from the Home Tab) through the Print icon in the lower left when viewing open warehouses.

Purchase Orders

Purchase Order reporting provides an overview of different aspects of purchase orders and their status in Tradepoint.

- Purchase Orders
- Purchase Orders by Supplier
- Purchase Orders by Product
- Purchase Orders Summary

Projects

Reports on projects and time management options within Projects are accessed here.

- Project Time Summary
- Project List
- Project by Category
- Project by Status

Warehouses

While basic Warehouse reports for allocated products and product valuation reports are accessible through warehouses in the print option in the lower left the reports within warehouses here include:

- Backordered Products
- Inventoried Product Analysis

Accounting

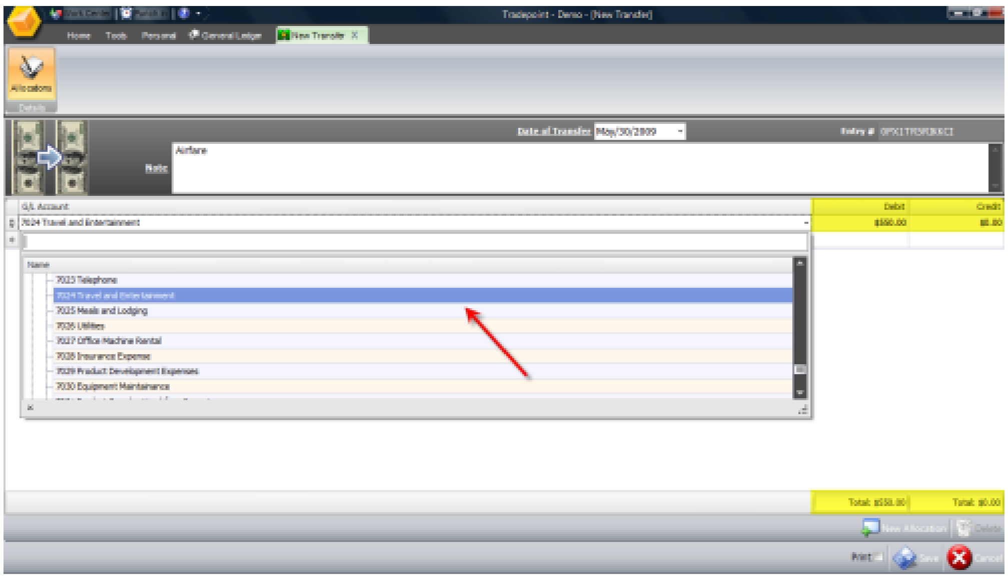
Journal Entries

Journal entries are entered into Tradepoint through the main General Ledger screen. Journal Entries and Funds

Transfers function in the same way. So, to enter in a Journal Entry for travel expenses click the Transfer Funds icon from the main General Ledger screen.

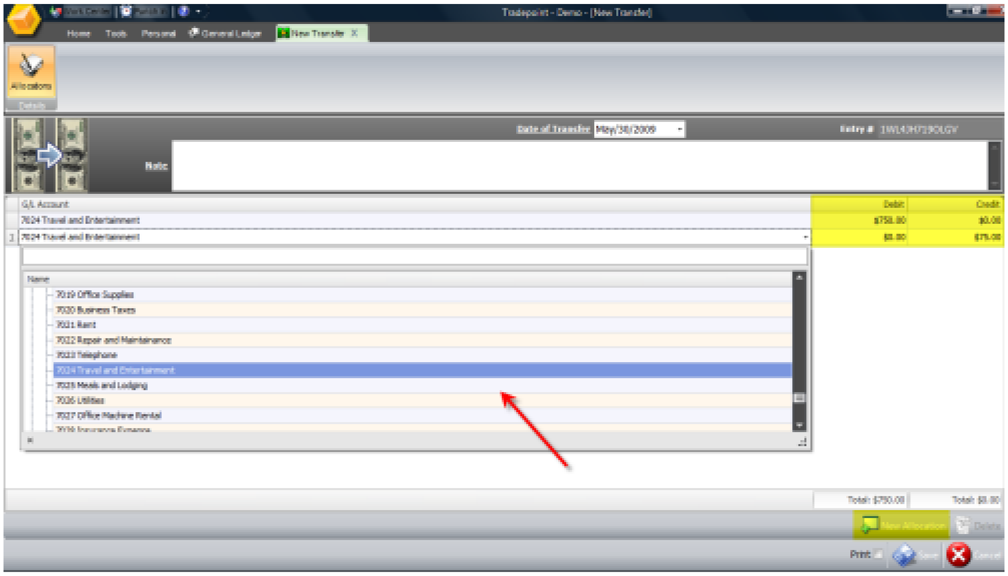
The main screen for a Journal Entry has a Debit and Credit field with a New Allocation icon in the lower right. This allows for multiple Journal Entries to be entered on one screen.

1. After adding a brief description in the Notes area, choose the G/L account to assign the Expense to through the drop down menu in the screen below.

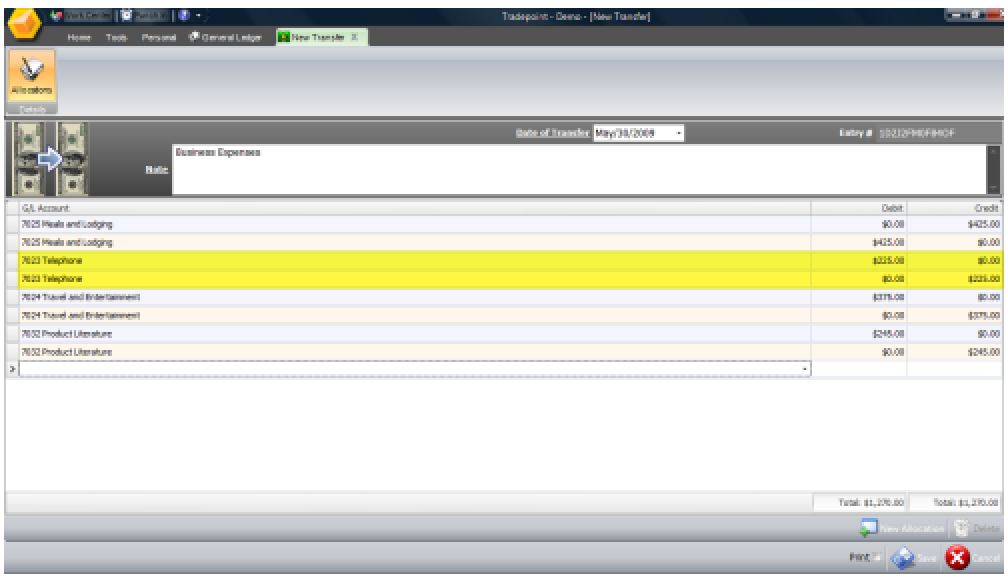


The two fields on the far right will have a Debit and Credit Column. Add the expense to either the Debit column. A New Allocation will have to be made with the same account only this time the expense needs to be added to the Credit column. The highlighted columns below will balance when the debits and credits are equal.

2. When adding the second allocation Tradepoint will remember your account that was chosen for the first allocation.

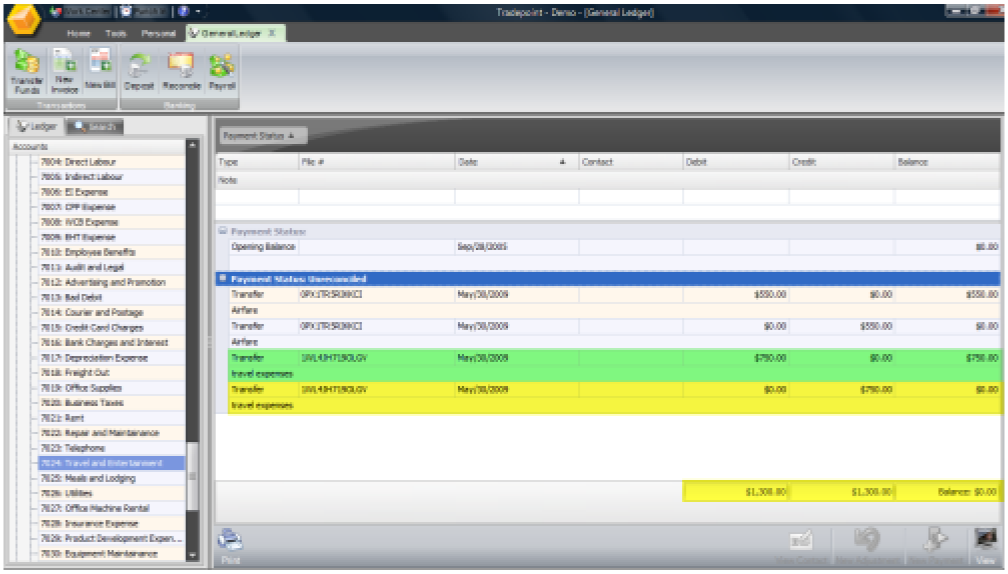


With multiple Journal Entries on a single screen your view will look like the example below.



The highlighted section shows a single expense entered into an account directly with the debit and the credit. Click the Save icon when finished.

The accounts with those journal entries will show each of the entries as a line item in that account in the General Ledger.

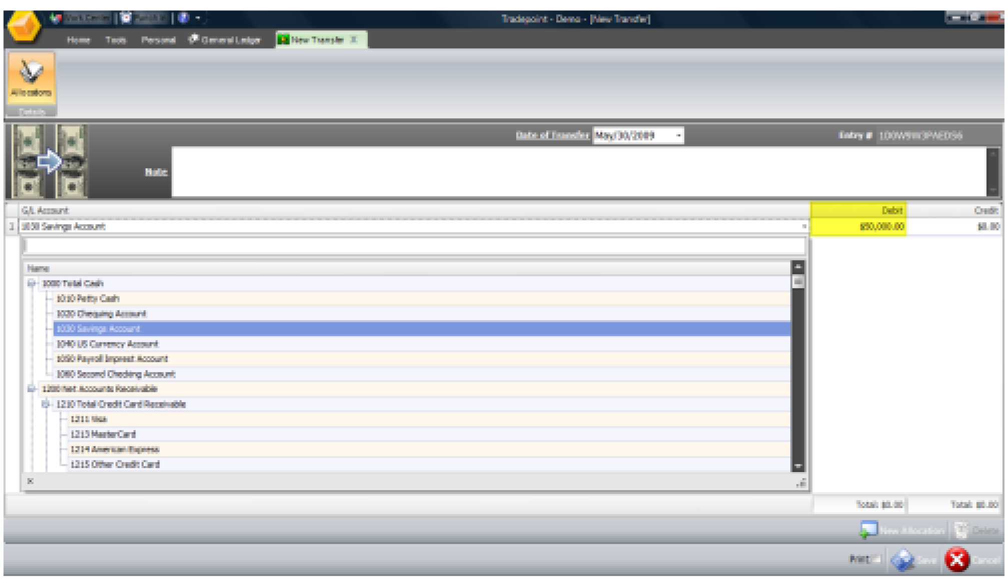


Transfer Funds

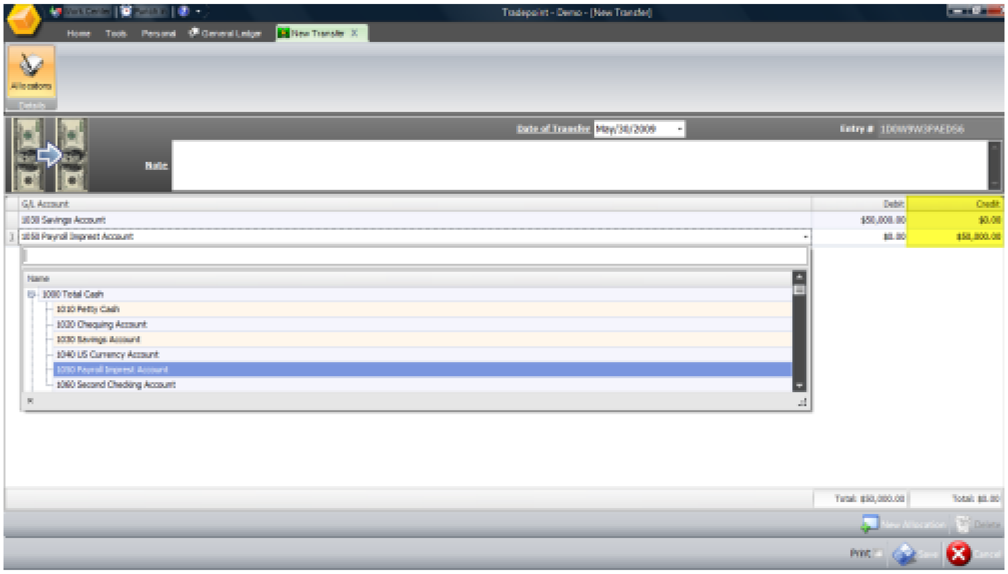
Transferring funds starts from the Transfer Funds icon in the upper left of the General Ledger screen. In the case of transferring funds one account will be debited an amount and another account will be credited the same amount.

The account which the funds are being added to needs to be credited and the account the funds are being transferred from is being debited.

In this example we are doing a transfer of funds for payroll. The first step is to debit the Asset account that the funds will be coming from.



The second step is to credit the correct account with the amount being transferred.



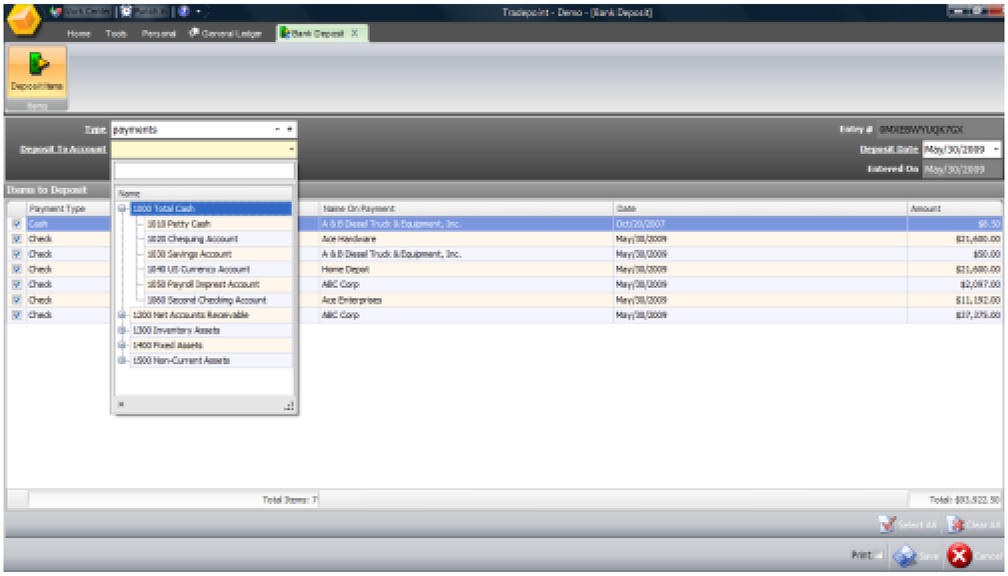
The result can be seen in the main General Ledger in each of the accounts. One will have a credit and one will have been debited the amount of the transfer.

Deposits

Deposits will automatically be picked up when payments are processed directly or through a website. Click the Deposits icon in the main General Ledger.

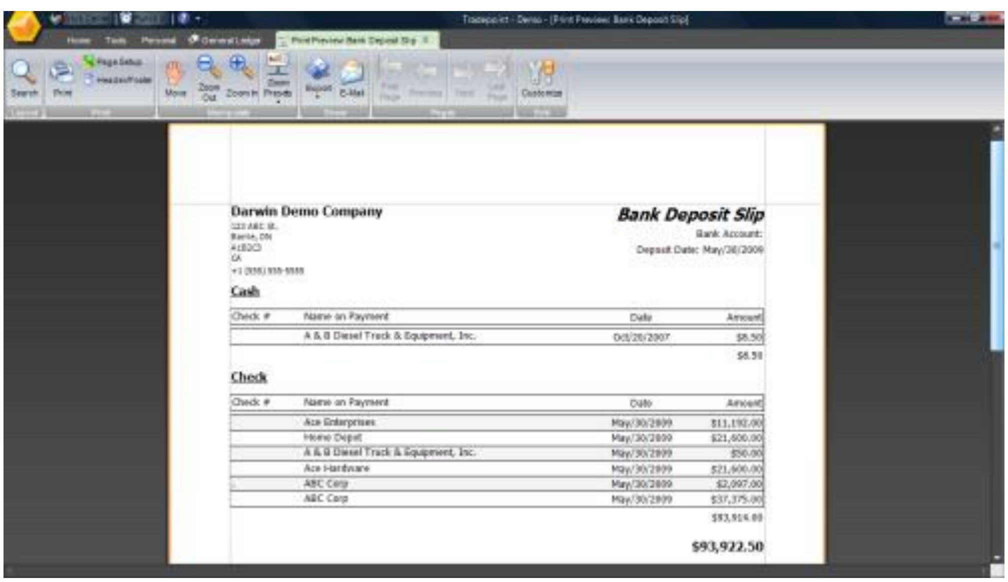
The Deposits screen will automatically pick up the items that need to be deposited directly. ***In the case of web payments they will not show up here, instead they will already be allocated to the correct General Ledger Accounts based on your payment preferences.***

Items that will have to be deposited directly will show up on the Deposits screen.



- Choose a Payment type (Payment Types can be modified with the blue plus).
- Adjust the date if necessary.
- Deselect any items individually or by using the 'Clear All' options. ***For items that have to be deposited into another account select only the items going into the chosen account and deselect the rest. When the Deposit tool is run again any items that have not been selected and Deposited will show up to be Deposited in another account.***
- Choose the Account to Deposit the payments to.
- An option print out a Deposit slip is available. (This is not a bank deposit slip. It is a printable record of the Deposit)
- Click Save when finished.

Below is an example of the Deposit slip. This form is customizable through the Customize icon on the top tool bar.

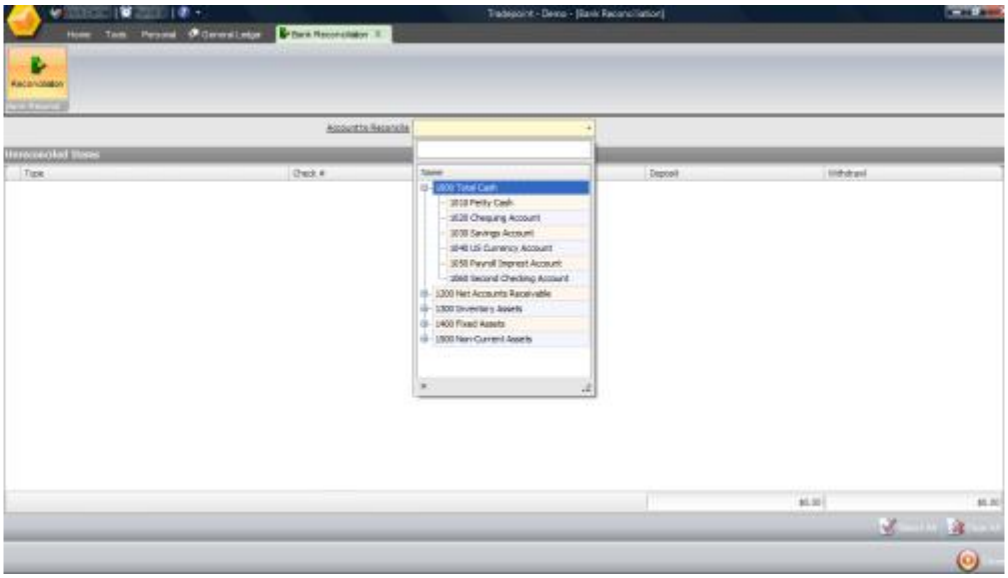


All items deposited will be reflected in the General Ledger account as soon as the Deposit is saved.

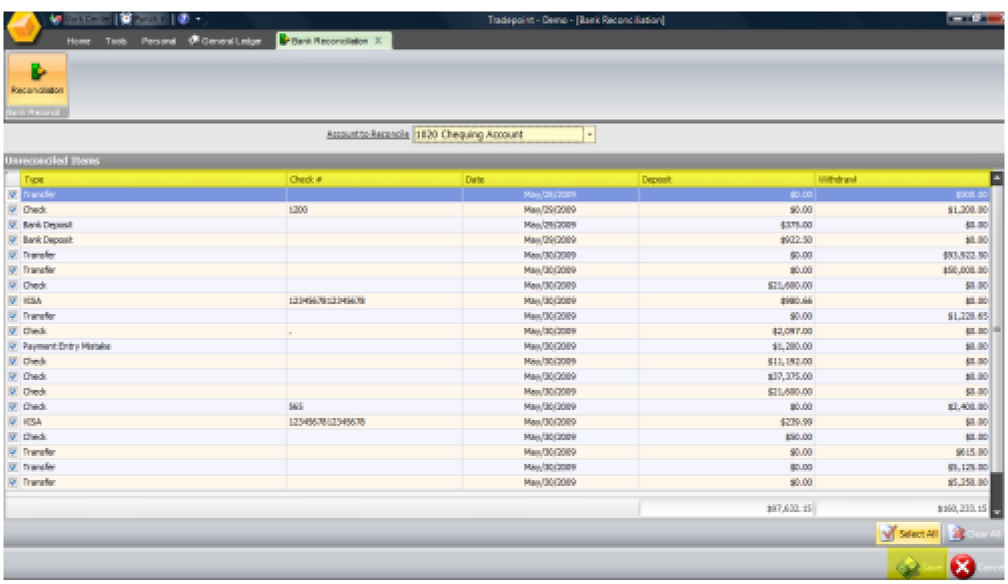
Reconciliations

The Accounts Reconciliation tool is accessed through the main General Ledger screen.

To reconcile an account click the Reconcile icon. Then chose the General Ledger account to reconcile.



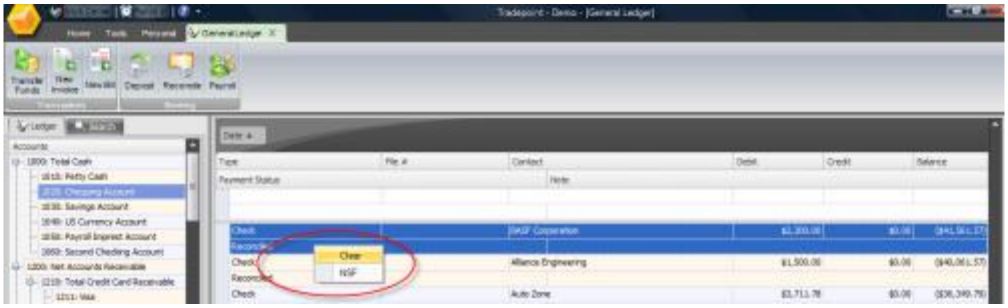
All transactions that have not been reconciled up to this point in this account will populate the screen.



The main fields are labeled at the top. Options to select or deselect individually are available for items that are not yet showing up on a bank statement.

Since some items do not appear yet within a bank statement simply leave those items un-reconciled in Tradepoint until they appear on your statement. Electronic reconciliations are not yet available with Tradepoint.

Once an item has been reconciled in Tradepoint if it has to be un-reconciled it can be done so individually within an account in the General Ledger.



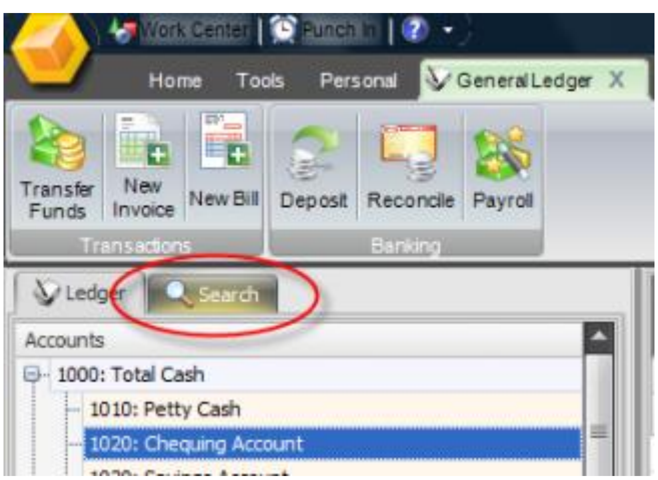
Searching for an item to be cleared or marked as NSF (Insufficient Funds) can be done by scrolling through items in an account or by following some of the tips in the next section detailing options within the general ledger search tool.

General Ledger Search Tool

The General Ledger Search Tool is found on the left hand side of the main G/L screen. The Search Tool supports simple and complex searches based for all items entered into the G/L including:

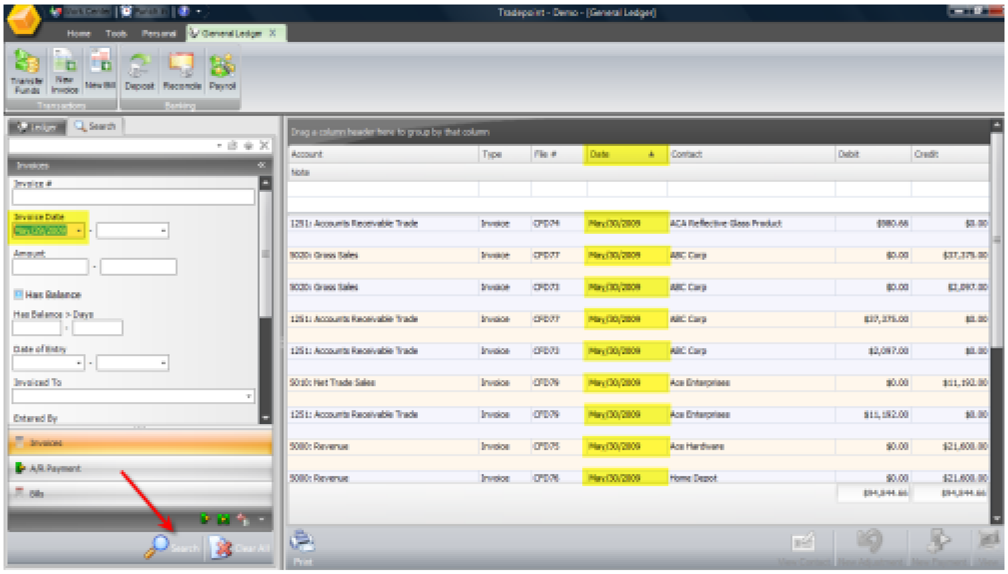
- Invoices
- A/R Payments
- Bills
- A/P payments
- Funds Transfers
- Journal Entries
- Returns/Refunds

An example of a simple search would be to search for Invoices which happened on a specific date. Date and Date range searches are the easiest searched for accounting activities within the General Ledger. The Accounting Search tool is found by clicking the search tab in the G/L.



In this example of a simple search we are doing a search for invoices that happened on a specific date. Within the search tool in Invoices on the left enter in a date in the 'date from' field. A search by date range is also easy by entering the date 'from and to' dates in the date range field.

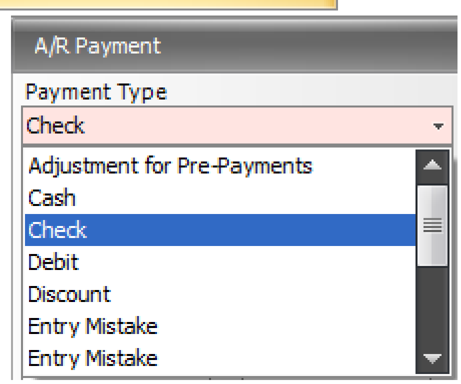
Click the Search icon at the bottom and all results will appear on the right of the screen.



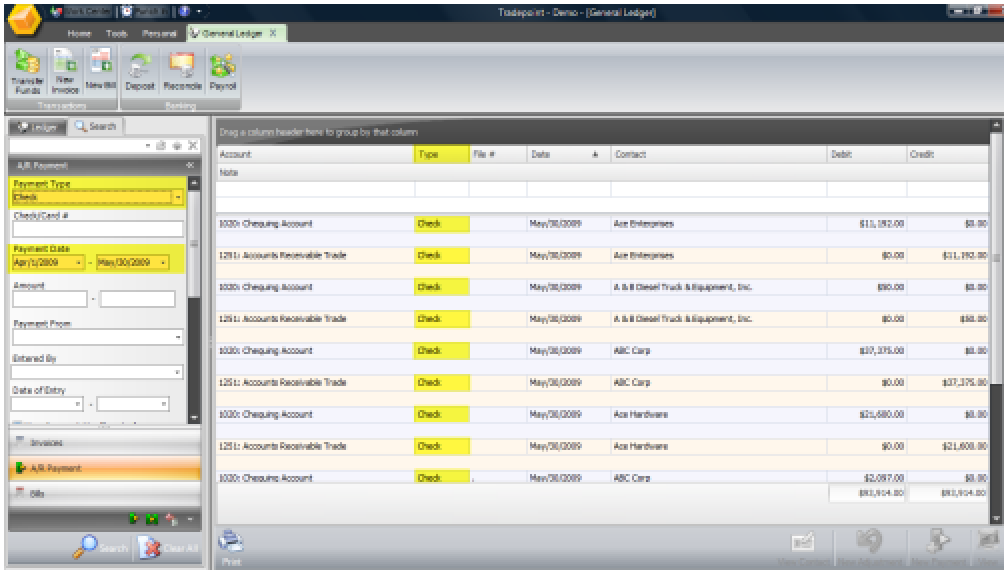
In this case of a search for Invoices on a specific date the results brought back all Invoice activity with the date searched. Double click on any of the items to drill down into a specific Invoice.

Another example of a more specific search for Accounts Receivable payments with a specific payment type (in this case check payments).

1. Click on the Search option in the General Ledger.
2. Click on the option to search for A/R payments.



3. Enter in payment Types to search for A/R Payment types on.
4. Enter in a date or date range for the A/R Payment activity for check transactions.
5. Click the Search icon when finished.
6. The results will show on the right side of the screen.



Point of Sale

Tradepoint's point of sale is integrated into Tradepoint for the ability to have a point of sale for register sales with the ability to access customer accounts for direct customer sales operating side by side.

Tradepoint's point of sales does work with most point of sale equipment available including bar code scanners, pole displays, touch screen registers.

The ability to print out receipts using a variety of printers including 8.5 x 11 paper as well as Dyno and other types or printers. Tradepoint will detect equipment attached to the terminals that the POS is installed on for use with the POS.

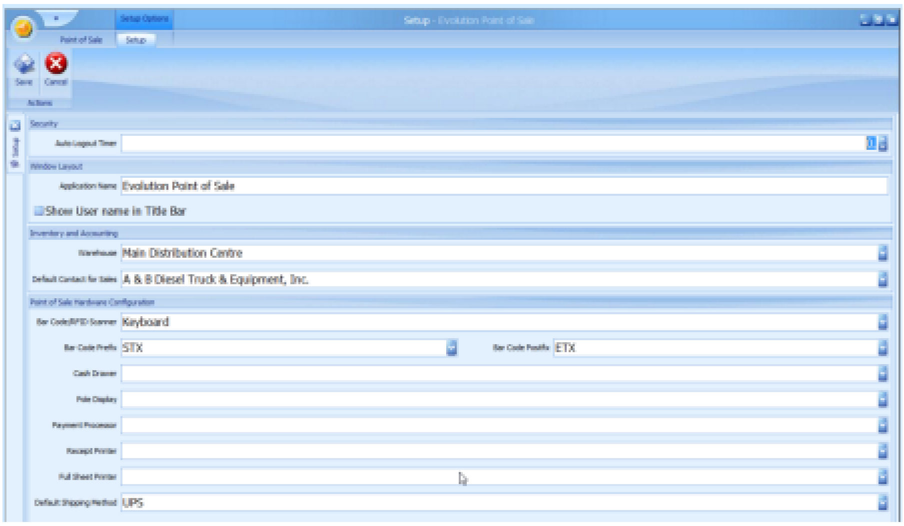
Setup & Configuration – Hardware & POS screen view

Tradepoint's POS screen does need to be setup initially to take into account the options you would like available as being active on the POS screen. Options include:

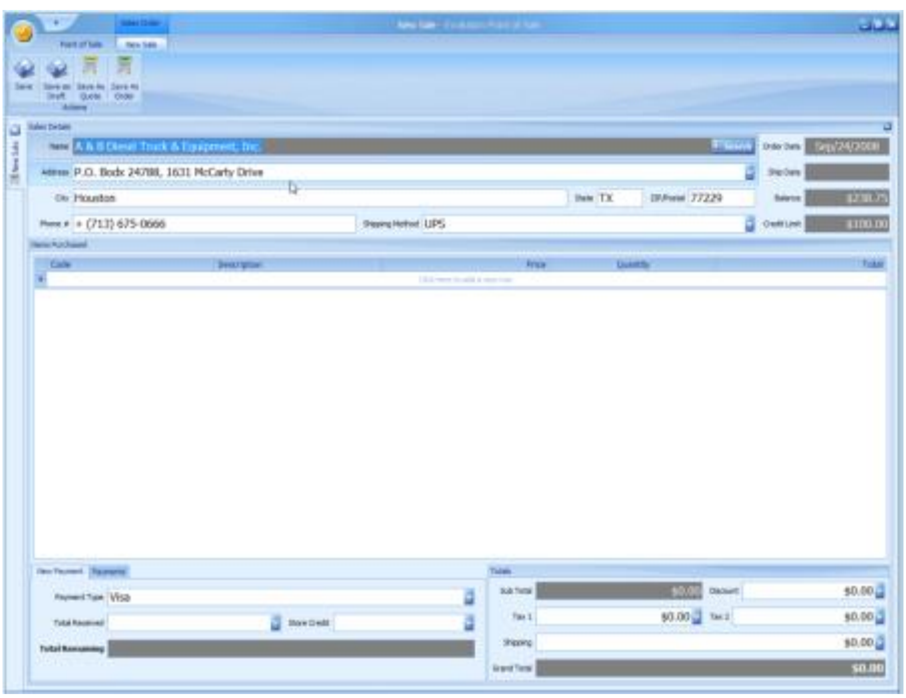
- Customer look up
- Inventory look up
- Product search
- Option to switch to a customer account
- Terminal Setup
- Access to Reports
- Advanced Search Tool

Below is an example of options within a POS screen.

These options are an example of what can be displayed as a part of the point of sales as sales are processed. An example of a point of sale setup screen is shown below specifying which options are available and displayed as part of a point of sale screen.



Once the point of sale is setup and operational an example of the POS screen which is viewed for an active POS is shown below.



The tab at the very top of the screen will allow the option to access additional features (customer and/or product lookup, advanced search tools and inventory look up for example) in an active point of sale system.

Enabling Barcodes in Reports

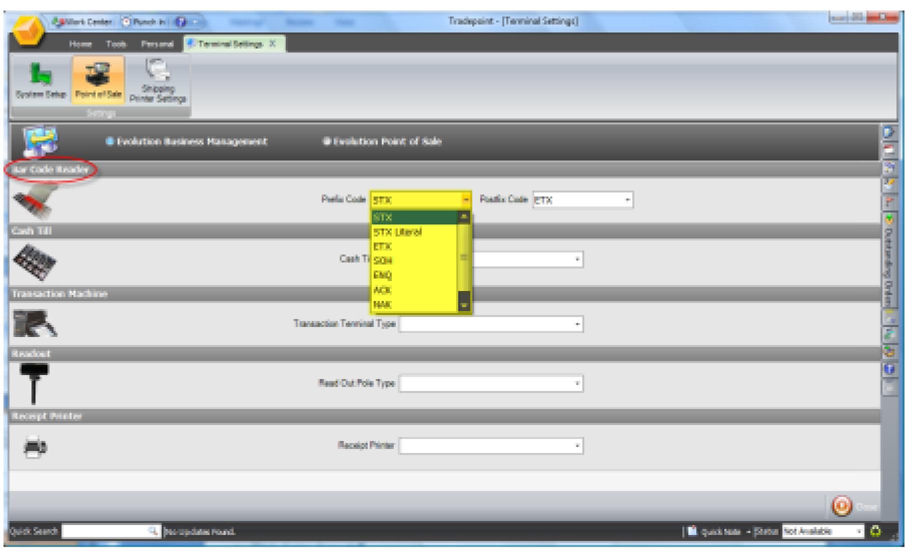
Enabling bar codes within reports for point of sale can extend to:

- Orders
- Invoices
- Pick Lists
- Packing sheets
- And different variations of these reports which may be saved.

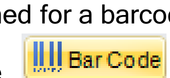
Each of these reports will have a Customize option. Within the customize option is where the bar codes are enabled for each of these reports.

The prefix and post fix codes have to be set up initially within the point of sale system to be matched to the prefix and post fix symbology within each of the reports. Once that has been setup then each of the different reports will need the corresponding symbology added to each report necessary.

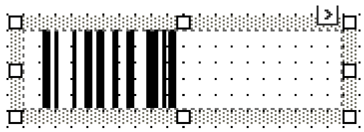
The prefix and post fix codes for bar coded reports have to be setup within the terminal settings in Tradepoint. Found under the tools tab in the terminal icon the prefix and postfix options can be found in drop down menu options.



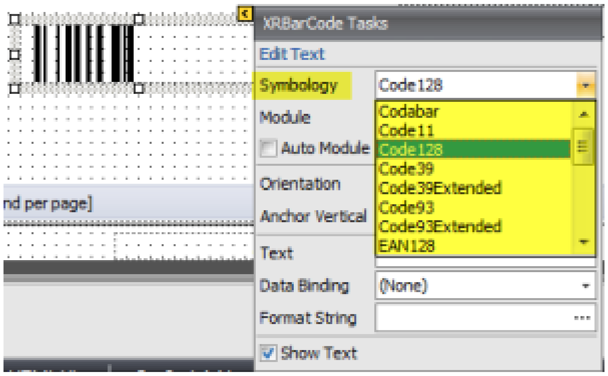
Once these are chosen then the corresponding symbology for the prefix and post fix codes can be set within the different reports that you would like to be bar code enabled and linked to the point of sale.

From the customize option for an Order (as an example) a field has to be defined for a barcode to be displayed. Within the customize screen there is an icon at the top of the screen labeled bar code. 

. Clicking on this icon and dragging it to the desired location in your report will create a bar coded field in that location in an Order.



Adjusting the symbology of the bar code field is done through the small arrow in the upper right corner seen in the field above. A menu will open with an option to choose from over 35 different symbologies for a particular bar code.



Choosing from the symbologies listed above will adjust the type of bar code shown in the field of an order, Invoice etc. Save the report and each time the report is printed out the bar coding will correspond to the product involved and add/subtract from Inventory as sales are processed.

Daily Sales Reports

Daily sales from point of sale will show up when a sales report for the day has been run. Typically a point of sale is set up with all sales going into a generic customer account so daily sales can be viewed either front the customer account or from a daily sales report generated from My Business.

Receipts would be ‘Z’d’ out from the receipt machines and then a daily sales report can be generated from My Business in the Orders section with the current date. The search option will generate the report with relevant detail which can be printed or exported out of Tradepoint from there.

Index

F

G

H

I

J

K

L

M

N

T

U

V

W

Y

Z