

Quick Step by Step Setup Guide for iShiPLY.com

(Follow these Step by Step & You will be Up & Running in No Time)

✚ STEP ONE (After Registration)

- ✚ Go To >> Company Settings (Complete All Fields, There are Multiple Tabs to Complete)
 - ✓ >Details Tab (Start Typing Your Address & Make Sure the Pin Point Location on the Map **IS** Your Actual Location)
 - ✓ >Documents Tab (You can upload all your Company Documents for Easy Access. **NOT MANDATORY**)
 - ✓ >General Settings Tab (Localization Settings like Currency etc..)
 - ✓ >Banking Details (Banking Details to Add to Invoices etc..**NOT MANDATORY**)
 - ✓ >Micro Sites (Used to Create a Web / Profile Page..**COMING SOON**)
 - ✓ >Locations (Used to Setup Multiple Branches / Locations..**COMING SOON**)
 - ✓ >Others (Used to Tell System where to Start Invoice Numbers)
- ✚ You Can Now Add some Test Shipments to Test The iShiPLY.com System & Get a Feel for How things Work!

Explanation: iShiPLY.com Needs this Data to Perform Functions for You! We use your Pin Point Location to Calculate Distance of Trips etc... **This Information will NEVER be Shared or Sold by iShiPLY.com** (After Registration, We have added some default things like a Default Driver, Vehicle & Customer. This was done to get you using & testing the system ASAP)

✚ STEP TWO (Integrating Your Existing Accounting System, if you Don't Use an Accounting System, Skip to Step Three)

- ✚ Go To >> Integration Settings (**Very Important to Sync Your Accounting System at this Stage**)
- ✚ >> Select Your Accounting System to Integrate
 - ✓ FrontAccounting (Our Free Accounting System if You Don't use one of the Systems Listed below)
 - ✓ SageOne (South Africa & Some Africa Countries)
 - ✓ QuickBooks (Worldwide)
 - ✓ Xero (Worldwide)
- ✚ >> iShiPLY.com Will Sync Your Taxes, Items & Services & Customers & Suppliers
 - ✓ Taxes (**Always Import Your Taxes First**, then Export Again, This will Sync the 2 Systems)
 - ✓ Items / Services (**Always Import Your Items / Services First**, then Export Again, This will Sync the 2 Systems)
 - ✓ Customers (**Always Import Your Customers First**, then Export Again, This will Sync the 2 Systems)
 - ✓ Suppliers (**Always Import Your Suppliers First**, then Export Again, This will Sync the 2 Systems)
 - ✓ Carriers (**All Carrier are Suppliers**, Please Update Suppliers that ARE Carriers by Clicking the Carrier Button)

Explanation: iShiPLY.com will Integrate with Your Accounting System, To make things easier for you, it is always better to Add any of these Options via iShiPLY Once you have integrated, Whatever you Do in iShiPLY.com will Also Be Done in Your Accounting System, Should you Make a Change in Your Accounting System, You will Then Need to Import to iShiPLY.com again, We **DO NOT** Control Updates from your Accounting System to iShiPLY.com but We Can Control from iShiPLY.com to Your Accounting Package. EG. If you Edit a Tax / Service / Contact etc.. in iShiPLY.com, We will Also Edit in Your Accounting System to ensure both stay Synced but if You Edit in your Accounting System, these changes will NOT be Automatically updated within iShiPLY.com

✚ STEP THREE (Don't Make Use of an Accounting System, Skip Step Two & Continue below)

- ✚ >> You will Need to Manually Add Your Taxes, Services, Customers & Suppliers
- ✚ Go To >> System Settings >> Tax / VAT Settings
 - ✓ Add The Taxes Used in Your Country
- ✚ Go To >> System Settings >> List of Items / Services
 - ✓ Add Any Services / Items that you use that are **NOT** Listed already
- ✚ Go To >> Contacts >> Customers Tab
 - ✓ Add Your Customers from the Customers Tab
- ✚ Go To >> Contacts >> Suppliers Tab
 - ✓ Add Your Suppliers from the Suppliers Tab
 - ✓ If the Supplier You Adding is Also a Carrier, Please Select the Carrier Button in the Top Right