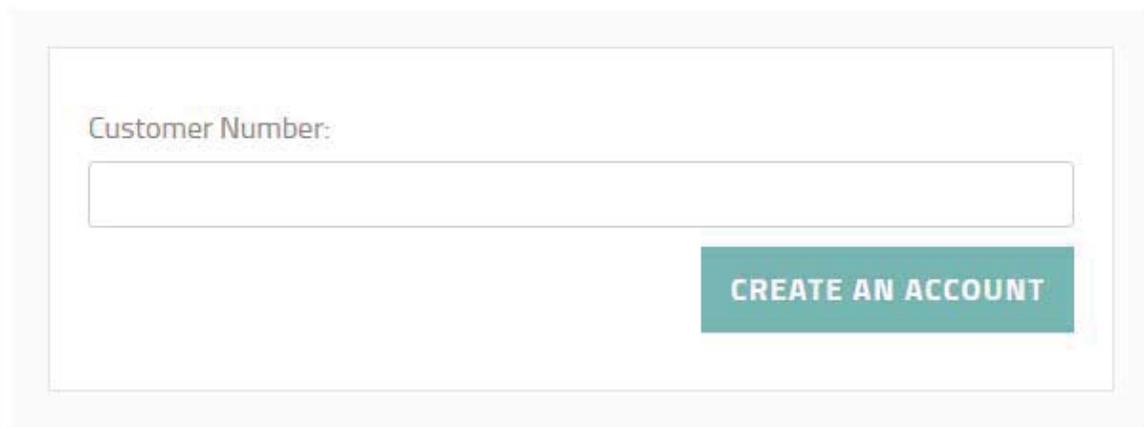# Help Section

Registration & Login

To register an account, click the My Account link located at the site header. You will be asked to type in the Customer Number given to you.

After entering your Customer Number, you will be directed to the Account Information page where you will need to provide the following details to set up your Account:

- Address
- City
- State
- Zip Code
- Phone Number

Register for online access to your Commercial Account

Use the form below to self-register for gaining access to your existing commercial account with us.

Account Information

Account Number:

Address:

City:

State:

Zip Code:

Phone Number:

CONTINUE

To complete the registration process, you will be asked to provide your full name, a unique username and password for the account, and the e-mail address you

will be using. Enter the information needed in the required fields before clicking the "Register" button.

Create a New Account

Passwords are required to be a minimum of 6 characters in length.

Account Information

Username:

[   ]

Email:

[   ]

Confirm Email:

[   ]

Password:

[   ]

Confirm password:

[   ]

First Name:

[   ]

Last Name:

[   ]

CDAK7

Please input captcha here.

REGISTER

An email notification will then be sent to your email address to confirm your registration. Once you've received this e-mail confirmation, click on this link to complete your registration.

All registered accounts will be evaluated by the website administrator. You will receive an email confirming the activation of your account. The email will also have a link which you can click on to log into your new account.

Changing your password

If you happen to forget your password, click on the "Forgot your password?" link. You will be redirected to a screen that will ask you for your username or email address.

Forgot Your Password?

Account Information

Username:

[   ]

OR

Email:

[   ]

SUBMIT

If you have forgotten your password, we are not able to tell you what it was. You can submit a request to generate a new password by entering either your username or email address below. This will send a new password request form to the email address on file. This email will contain a link that you will need to click on to actually create your new password. Once you've clicked on that link, the system will generate a new password and send you another email with the new password. Please be patient in waiting for these emails as they can take upto 15 minutes to arrive, if not sometimes longer. Please do not click that link multiple times or the system will continue to generate new passwords for you.

If you want to change your password while logged in, click on the "Change Password" link. Follow the steps below to change your password:

- Enter your current password in the first box.
- Enter your new password in the second box.
- Confirm your new password in the third box.
- Click the "Change Password" button.

We recommend that you change your password frequently to maintain proper security of your account information.

Shared Account Usage (Multi-user access)

Please note that the system can accommodate multi-user access to your online account. When prompted for a Username and Password, each user should identify themselves with their own unique email address, name, and password. For security purposes your company should have only one contact to set up all user accounts.

Account Section

The Account section gives you 24/7 access to both your latest and historical account information. Depending on your account access settings, you can view important information such as your billing details, job orders, and statements. The data found in your account is automatically updated at the end of the day ensuring that the information stays up-to-date at all times.

The dashboard also provides you with your current account information, including your customer number, billing address, customer name, and email address.

Account Information

Welcome Admin!

Customer Number: MCO

Customer Name:

Email:

Billing Address: 41 CHARLEVOIX AVE
PETOSKEY, MI 49770

CURRENT STATEMENT

Current Statement – Time Period: Thursday, June 15, 2017

Balance Forward:	$152,062.34	Bal: 0 - 30:	$131,249.83
Payments:	$2,912.91	Bal: 31 - 60:	$15,194.93
Current Charges:	$92,716.80	Bal: 61 - 90:	$698.81
Credit Balance:	$130,027.93	Bal: Over 91:	$1,741.33
Service/Finance Charges:	$264.53	Balance Due:	$111,838.30
Discounts:	$8,594.52	New Finance Charges:	$264.53

CURRENT INVOICES

Invoice #	Date	Customer P.O.	Job	Job Name	Amount
1706	06/15/2017		89		$23.31
1706	06/15/2017		0		$130.38
1706	06/15/2017		78		$112.35
1706	06/15/2017		79		$81.59
1706	06/15/2017		79		$850.82
1706	06/15/2017		82		$151.55
1706	06/15/2017		0		$4.87
1706	06/15/2017		82		($4.87)
1706	06/15/2017		0		($9.21)
1706	06/15/2017		87		$98.93

It even gives you a summary of your latest billing information including your current statements, invoices, and job requests.

Jobs

The Jobs folder gives you the ability to view your different job orders. It makes account management quick and easy by allowing you to view, sort, and store your invoice, orders, and quote information for that particular job request.

Job Details

Job Number: 7

Job Name: MATTDES

Status: Active

Current Balance: $28,382.46

Shipping Instructions: *JOBSITE
CONSTRUCTION

Primary Address: 26 CAMP DAGGET RD PETOSKEY, MI 49770

Credit Balance:	$0.00	Finance Charges:	$0.00
Current Balance:	$28,382.46	Total Charges:	$28,382.46
Outstanding Balance:	$28,382.46		

EDIT

Invoices   **Total: $28,382.46**

Ref #	Date	Status	Total
1706	06/15/2017	Open	$207.84
1706	06/15/2017	Open	$385.73
1706	06/15/2017	Open	$138.81
1706	06/14/2017	Open	$314.39
1706	06/14/2017	Open	$541.36
1706	06/14/2017	Open	$423.99
1706	06/14/2017	Open	$181.37
1706	06/13/2017	Open	$98.52

|◄ ◄ 1 2 ► ►| Displaying items 1 - 8 of 12

Clicking on a particular job will give you access to the following details: job number, job name, its status, and any shipping instructions you've provided.

Orders

The Orders section displays a list of the orders made under your account, making it easy for you to view, manage, and sort your orders. Clicking on a particular order will give you access to its Order Details page.

Your Orders

SEARCH ORDERS

Order Number:

Date Range:

Status:

-- Select --

Specific Date:

Customer PO:

Date From:

Job Number:

Date To:

Job Name:

CLEAR   SEARCH

Order #	Date ▾	Customer P.O.	Job #	Job Name	Status	Amount
1706	06/15/2017		78		Open	$0.00
1706	06/13/2017		80		Open	$289.60
1706	06/13/2017		78		Open	$395.80
1706	06/13/2017		80		Open	$0.00
1706	06/13/2017		77		Open	$3,657.00
1706	06/13/2017		77		Open	$490.65
1706	06/13/2017		0		Open	$1,474.50
1706	06/13/2017		0		Open	$1,649.19

The Order Details page displays the list of items for that particular order request. It provides details such as the Order Number, Order Date, Customer PO, the person who placed the order, the Order Status, the job it's assigned to, and any shipping instructions.

It also provides additional details about each item listed, including the product's SKU, Description, individual price, quantity, and its total price.

Invoices

The Invoice feature gives you access to the different products you've purchased. This section contains the following information: invoice number, Customer PO, the identity of the person who placed the order, job name, and shipping information.

Invoice Details

Invoice Number:	1706
Invoice Date:	Thursday, June 15, 2017
Order #:	
Customer P.O.:	NEW SHOP
Placed By:	
Job:	0:
Shipped To:	41 CHARLEVOIX AVE PETOSKEY, MI 49770
Salesperson:	SDO

PRINT TO PDF   **PRINT TO EXCEL**

SKU	Item / Descriptions	Price	Qty	Total
341154	CAMO 2-1/2"X9#GRN BUGLE HD 350CT	$25.00	1	$25.00
341134	CAMO 2"X8# GRN BUGLE HD 350CT	$25.00	1	$25.00
34CF	3/4" CDX PLYWOOD FIR	$36.50	2	$73.00

⟳ |◄ ◄ [1] ► ►| Displaying items 1 - 3 of 3

Subtotal:	$123.00
Tax:	$7.38
Total:	$130.38

The Invoice also provides other important details about your purchases for that period such as the product's SKU, description, price, quantity, and their total amount.

Customers are also given the option to search for invoices just by providing the invoice number, date range, or the specific date when the invoice was created.

Information displayed in the Invoice section can automatically be saved in your computer either as a PDF document or a Microsoft Excel spreadsheet.

Statements

The Statements feature provides a list of your statements per month. Each statement displays the total balance due, the balance forward, your current charges, discounts, and your credit balance, if you have any.

Statements - Thursday, June 15, 2017

Balance Forward:	$152,062.34	Bal: 0 - 30:	$131,249.83
Payments:	$2,912.91	Bal: 31 - 60:	$15,194.93
Current Charges:	$92,716.80	Bal: 61 - 90:	$698.81
Credit Balance:	[$130,027.93]	Bal: Over 91:	$1,741.33
Service/Finance Charges:	$264.53	Balance Due:	$111,838.30
New Finance Charges:	$264.53		
Discounts:	$8,594.52		

Invoice #	Invoice Date ▼	Type	Balance	Payments
1706	06/16/2017	Invoice	$ 0.00	$0.00
1706	06/16/2017	Invoice	$ 0.00	$0.00
1706	06/16/2017	Invoice	$ 0.00	$0.00
1706	06/16/2017	Invoice	$ 0.00	$0.00
1706	06/16/2017	Invoice	$ 0.00	$0.00
1706	06/16/2017	Invoice	$ 0.00	$0.00

Information displayed in the Statements section can automatically be saved in your computer either as a PDF document or a Microsoft Excel spreadsheet.

Quickbooks

The information stored in your My Account profile can also be synced using Quickbooks. By integrating your account with Quickbooks, you're able to import your account information and save them to your computer at the click of a button.

Quickbooks

You currently do not have QuickBooks Integration enabled. The first step for QuickBooks Integration is to download Intuit's "Web Connector" software. You can download it through this link. After you have downloaded the software, you will then need to download a configuration file. Please fill out the fields below and then click DOWNLOAD CONFIG FILE. This file will allow the QuickBooks Web Connector to synchronize your local QuickBooks database with invoice data from our Web site. After you installed the QuickBooks Web Connector software, click the "Add an Application" button, and then select the configuration file you saved.

In order to properly generate your configuration file, please answer the following:

What vendor name would you like our invoices to appear under on your QuickBooks record?

Preston Feather Building Centers

What date would you like to start synchronizing from?

3/18/2017

DOWNLOAD CONFIG FILE

Downloads:

Click here to Download Intuit's "Web Connector" Software.

To set up this feature, you will need to download the Quickbooks Web Connector Installer and the Quickbooks Web Configuration File. The installer will allow you to connect to your online account using the IBOS Connector while the configuration file will provide the necessary settings to make your Quickbooks program function properly after it has been integrated with your online account.

Once set-up has been complete, simply set the Sync Start Date for all Vendors and click Save.