

Getting Started with Pooley File Manager (Multiple Users)

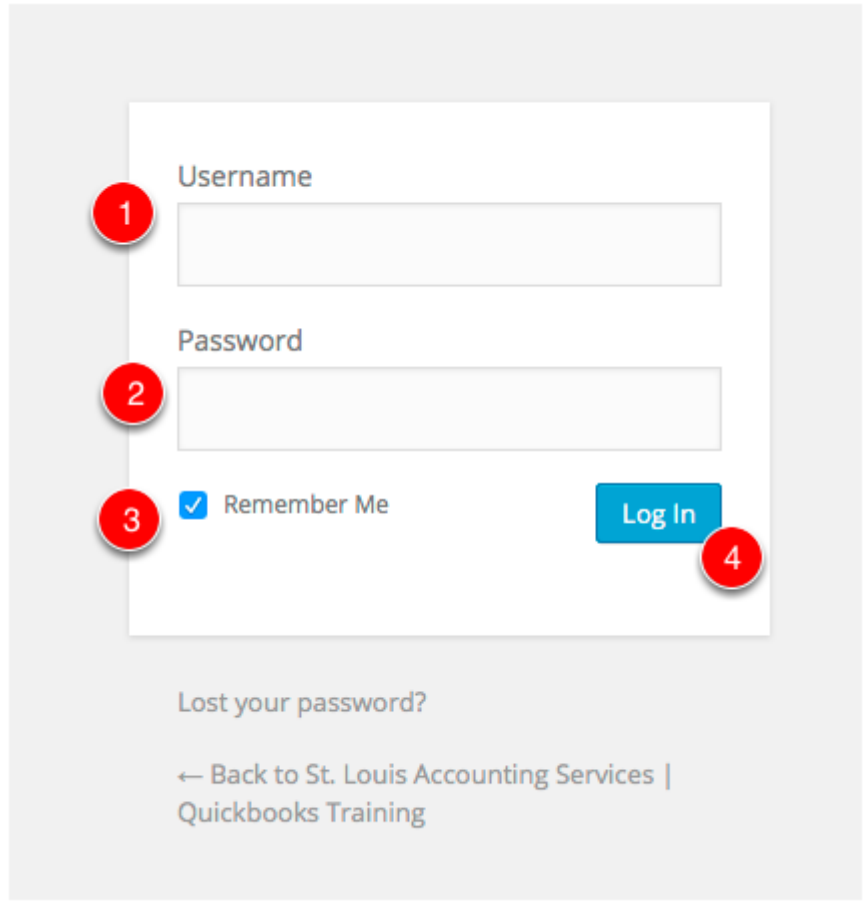
Go to Website

1. Go to: <https://pooleyacctg.com/>
2. Click on My Account

The screenshot shows the homepage of Pooley Accounting Services. At the top right, there is a banner that says "Receive a FREE Accounting Consultation". Below this is a navigation bar with social media icons (Facebook, RSS, Twitter, Google+, LinkedIn) on the left and a menu with "My Account" (highlighted with a red box), "FAQs", "Careers", "Contact", and "Call (314) 260-7808" on the right. The main header features the Pooley Accounting Services logo on the left and the text "Professional Accounting and Bookkeeping Services for Small Business Owners - Since 2007" on the right. A secondary navigation bar includes "Home", "About Us", "Accounting & Bookkeeping Services", "Quickbooks® Training", "Consulting", "Free Consultation", and a search icon. The main content area has a large banner with the headline "Smart Business Begins..." and a sub-headline "With Professionals You Can Trust". Below this is a call to action "LEARN MORE" and a testimonial quote: "One of the Best Accounting Firms in St. Louis" from St. Louis Small Business Monthly - May 2014. The bottom section features three service highlights: "We Come To You" (with a car icon), "Professionally Accredited Staff" (with a star icon), and "Free Accounting Consultation" (with a checkmark icon).

Log In

1. Put in your username (case sensitive)
2. Put in your password (case sensitive)
3. Click Remember Me (optional - but saves time by remembering your password)
4. Click Log In



The screenshot shows a login form with the following elements:

- 1**: A red circle with the number 1 pointing to the "Username" input field.
- 2**: A red circle with the number 2 pointing to the "Password" input field.
- 3**: A red circle with the number 3 pointing to the "Remember Me" checkbox, which is checked.
- 4**: A red circle with the number 4 pointing to the "Log In" button.

Below the form, there is a link for "Lost your password?" and a footer with the text "← Back to St. Louis Accounting Services | Quickbooks Training".

File Manager

When you login, you will see your company's folder.
Click Folder to go inside.

The screenshot displays the Pooley File Manager interface. At the top, there is a green navigation bar with social media icons (Facebook, RSS, Twitter, Google+, LinkedIn) on the left and links for 'My Account', 'FAQs', 'Careers', 'Contact', and 'Call (314) 260-7808' on the right. Below this is the Pooley Accounting Services logo on the left and the text 'Professional Accounting and Bookkeeping Services for Small Business Owners - Since 2007' on the right. A secondary navigation bar contains 'File Manager', 'Help', 'Log Out', and a search icon. The main content area features three buttons: 'Add File', 'Refresh', and 'Logout'. Below these is a search bar and a breadcrumb trail starting with 'Home'. A list of folders is shown, with the folder 'Your Company's Folder' highlighted in grey. A red callout box with an arrow points to this folder, containing the text 'click to go inside your company folder'. To the right of the folder list is a 'With Selected:' dropdown menu. On the far right, a 'My Account' sidebar contains links for '> File Manager', '> Help', and '> Log Out'.

Inside Your Company Folder

Inside your company's folder, you will see a folder with YOUR NAME. Click on your folder before adding files.

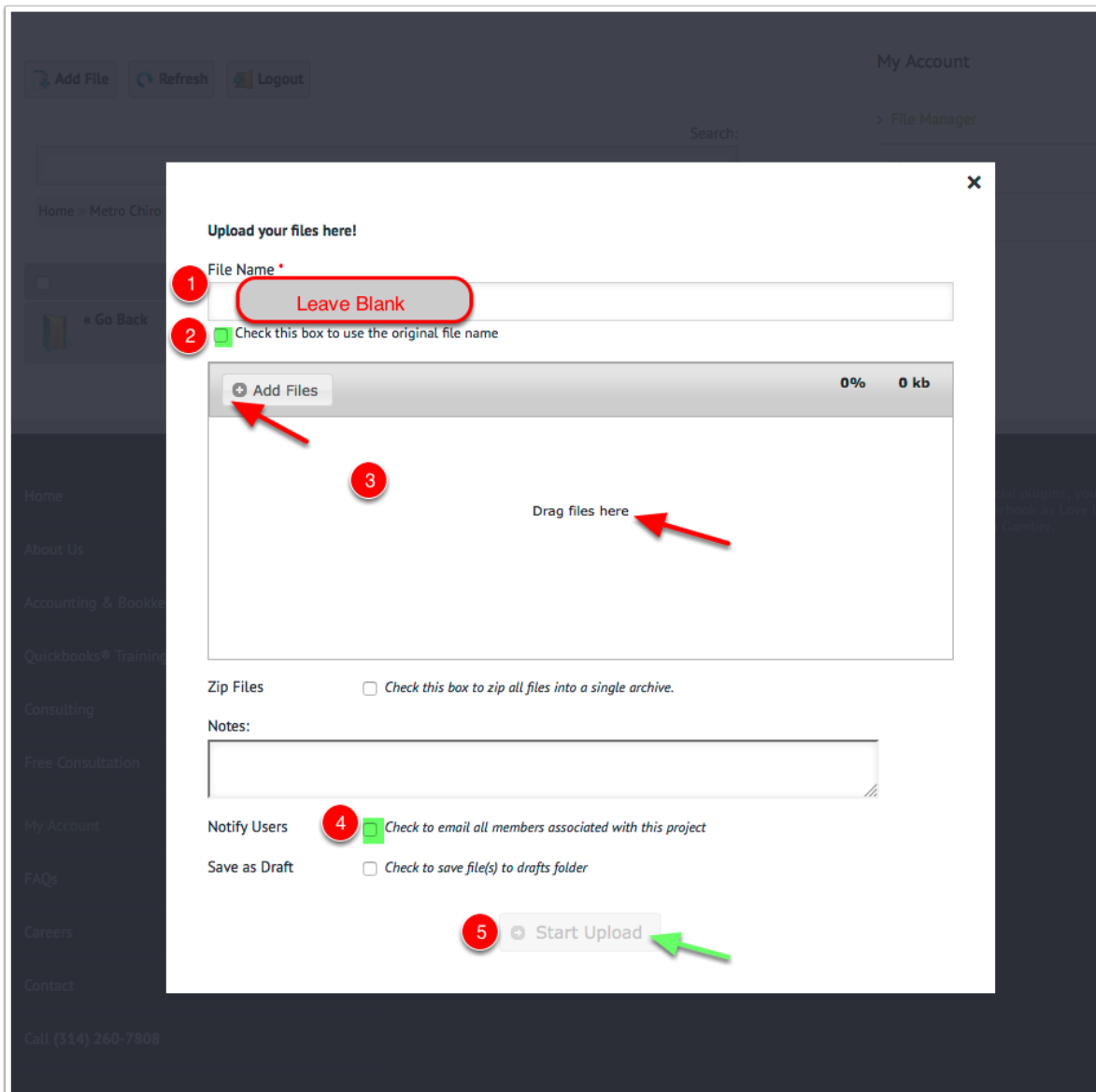
The screenshot shows the Pooley File Manager interface. At the top, there is a green navigation bar with social media icons (Facebook, RSS, Twitter, Google+, LinkedIn) on the left and links for 'My Account', 'FAQs', 'Careers', 'Contact', and 'Call (314) 260-7808' on the right. Below this is the Pooley Accounting Services logo and the text 'Professional Accounting and Bookkeeping Services for Small Business Owners - Since 2007'. The main content area has a header with 'File Manager', 'Help', and 'Log Out' links, along with a search icon. Below the header, there are three buttons: 'Add File', 'Refresh', and 'Logout'. A search bar is present with the label 'Search:'. Below the search bar, there is a breadcrumb trail starting with 'Home »'. To the right of the breadcrumb is a 'With Selected:' dropdown menu. The main content area displays a list of folders. The first folder is labeled '« Go Back'. The second folder is labeled 'YOUR NAME' and is highlighted with a red callout box that says 'click your folder then add files'. To the right of the folder list, there is a 'My Account' sidebar with links for '> File Manager', '> Help', and '> Log Out'.

Add Files When You're in Your Folder

The screenshot displays the Pooley File Manager web interface. At the top, there is a green navigation bar with social media icons (Facebook, RSS, Twitter, Google+, LinkedIn) on the left and links for 'My Account', 'FAQs', 'Careers', 'Contact', and 'Call (314) 260-7808' on the right. Below this is the Pooley Accounting Services logo and the text 'Professional Accounting and Bookkeeping Services for Small Business Owners - Since 2007'. A secondary navigation bar contains 'File Manager', 'Help', and 'Log Out' with a search icon. The main content area features three buttons: 'Add File' (with a red arrow pointing to it), 'Refresh', and 'Logout'. Below these is a search bar and a breadcrumb trail starting with 'Home'. A 'With Selected:' dropdown menu is visible. At the bottom, there is a 'Go Back' button and a red-bordered button labeled 'Inside Your Folder'. On the right side, a 'My Account' sidebar lists 'File Manager', 'Help', and 'Log Out' with expandable arrows.

Adding Files

1. Leave name BLANK
2. Check box to use original file name (IMPORTANT - esp with QUICKBOOK FILES)
3. Click Add Files OR Drag Files
4. Click Notify Users
5. Then Click Start Upload



File after Upload

The screenshot displays the Pooley File Manager interface. At the top, there is a green navigation bar with social media icons (Facebook, RSS, Twitter, Google+, LinkedIn) on the left and links for 'My Account', 'FAQs', 'Careers', 'Contact', and 'Call (314) 260-7808' on the right. Below this is the Pooley Accounting Services logo and tagline 'accounting with a personal touch.' on the left, and the company name and tagline 'Professional Accounting and Bookkeeping Services for Small Business Owners - Since 2007' on the right. A secondary navigation bar contains 'File Manager', 'Help', 'Log Out', and a search icon. The main content area features three buttons: 'Add File', 'Refresh', and 'Logout'. Below these is a search bar and a breadcrumb trail starting with 'Home'. A 'With Selected:' dropdown menu is visible. A file entry is shown with a checkbox, a folder icon, and the text '« Go Back'. Below that, another file entry is shown with a checkbox, a file icon, and the text 'Your File' (highlighted with a red circle), followed by the date 'th 2015 10:17 PM' and the size '1.25 MB'. On the right side, a 'My Account' sidebar lists 'File Manager', 'Help', and 'Log Out' with expandable arrows.