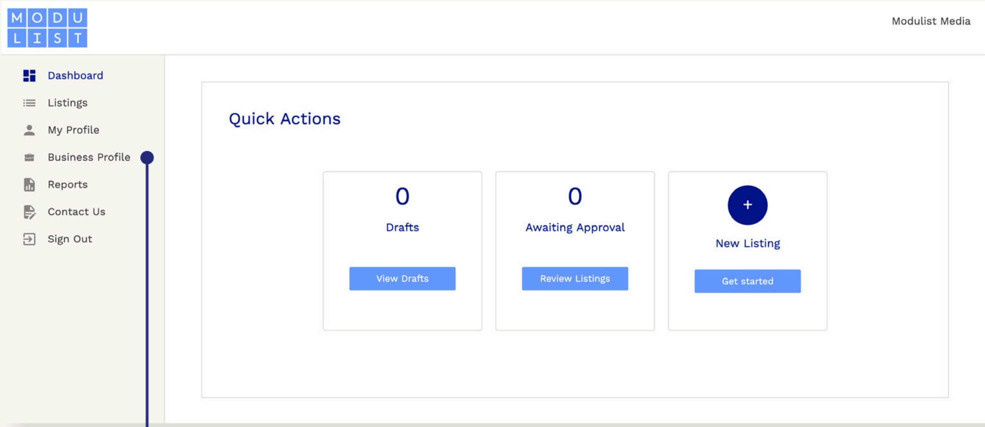
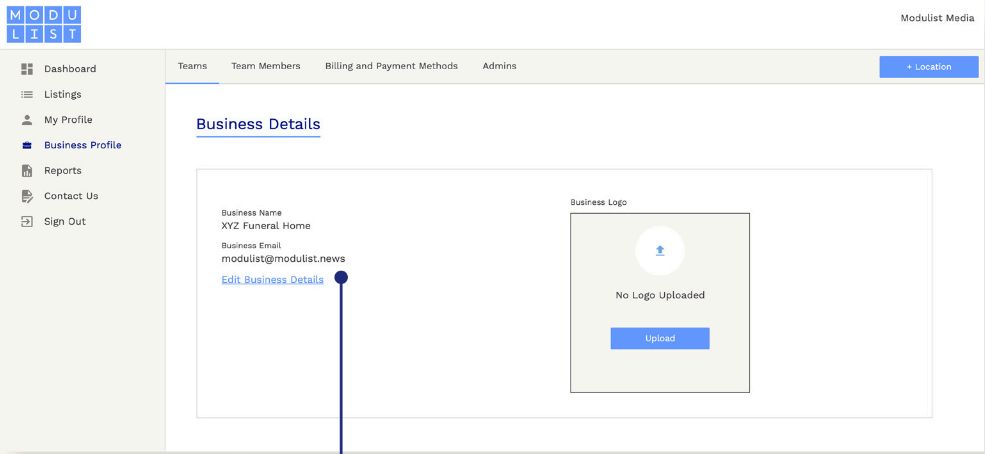
HOW TO

Setting Up Your Business Account

Now that you have successfully created your business account, you are ready to start setting up some of the different features built into the system. Upon your first log in, you will be asked if you want to jump straight to creating a listing or viewing your account. Your dashboard should look like the image to the right.



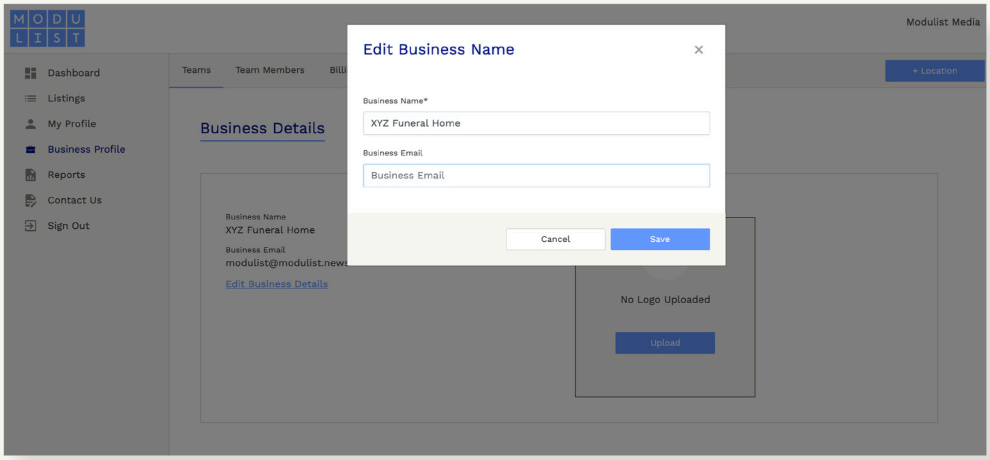
click Business Profile

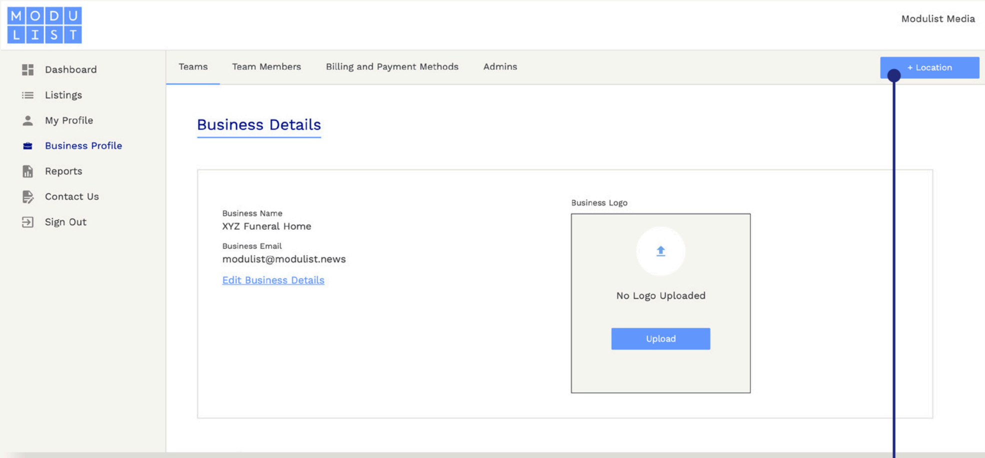


click to edit Business Details

You will have the option to add team members, multiple payment methods, admin users, upload your business logo and add multiple locations of your business. Let's start with editing your business details. This will allow you to change the name of the business and add a general email that your order proofs can be sent to.

Click Edit Business Details. This will bring up a new window. If you want to have proofs sent to an email inbox that multiple people can access, you can enter that here. Save any changes you make.

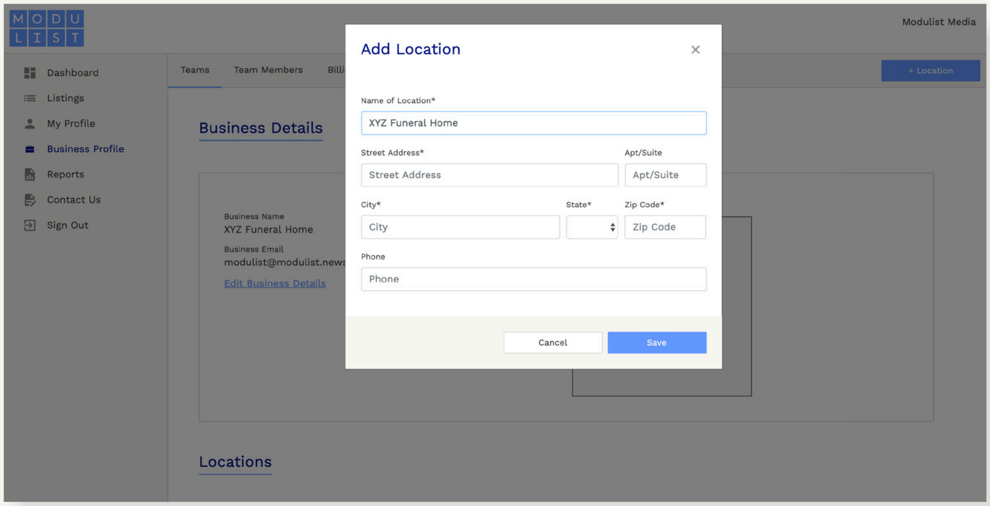




Now, let's set up a location for your business.

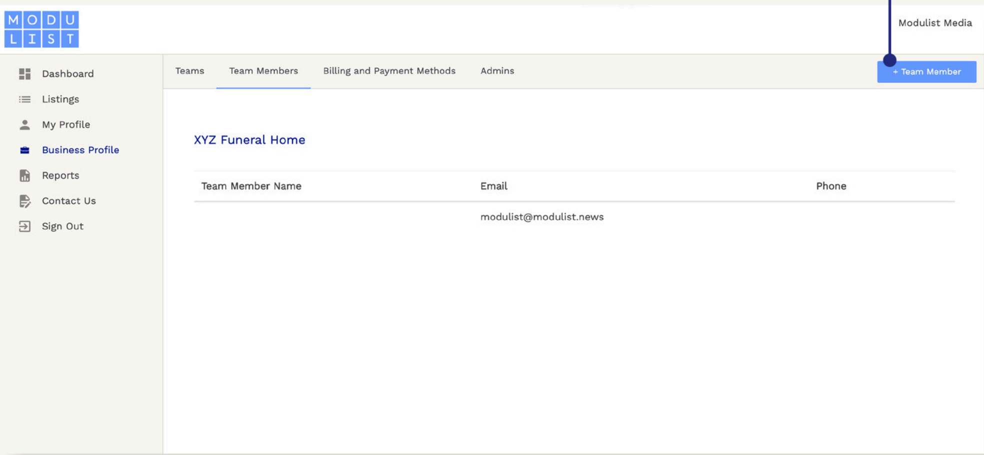
click +Location

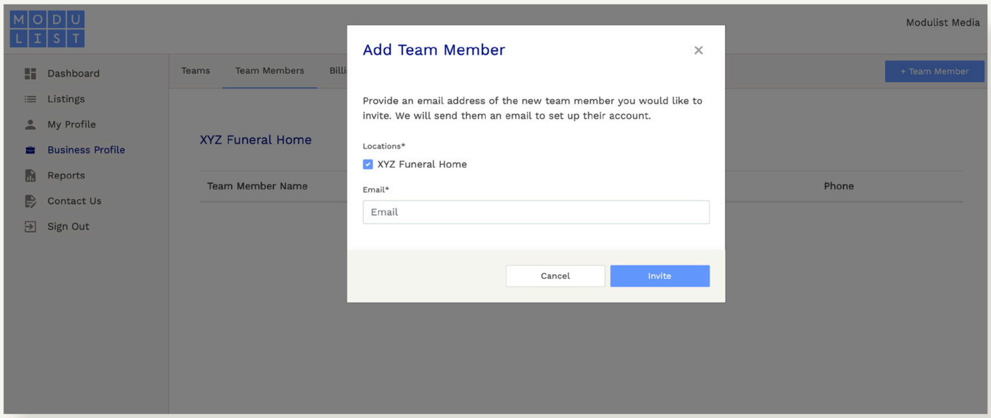
A new window will open. Fill out all of your business details. If your business has more than one location, for example you own multiple funeral homes in different cities, repeat this process for each location.



click +Team Member

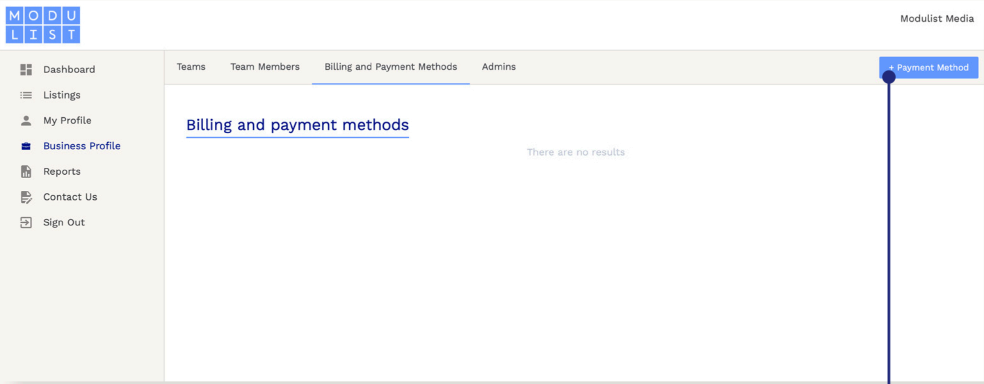
This will allow each team member to be part of the parent account. They will have access to place listings for their specified locations, access to certain payment information, etc. Click the +Team Member button in the top right hand corner of your screen.





From here, you can enter each team member's email address. Additionally, you can assign them to one or all of the locations you have set up for your business by clicking the box. Make sure to click the Invite button.

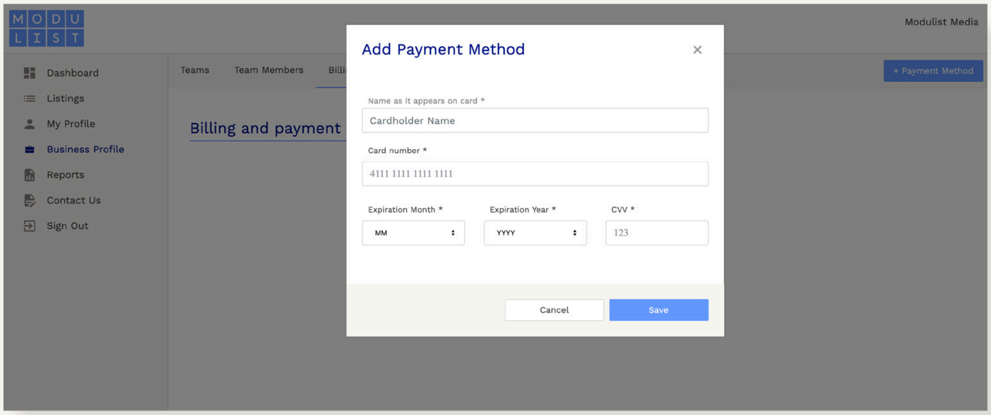
Once you have added all of your team members, set up your payment methods. Modulist does require you to prepay for all listings submitted. You can add a card to keep on file so you don't have to scramble to find your card to submit the listing.

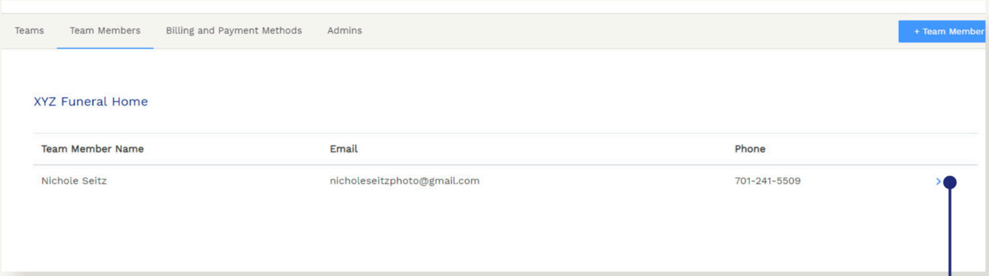


*It is important to keep in mind that, if you are set up as a funeral home for example, you can pay with a family's credit card at the end instead of using a business card. Move to the Billing and Payment Methods tab.

click +Payment

Enter in the information on the card you wish to keep on file. This card will now be available for team members to use. You can assign different cards to different team members if you'd like.

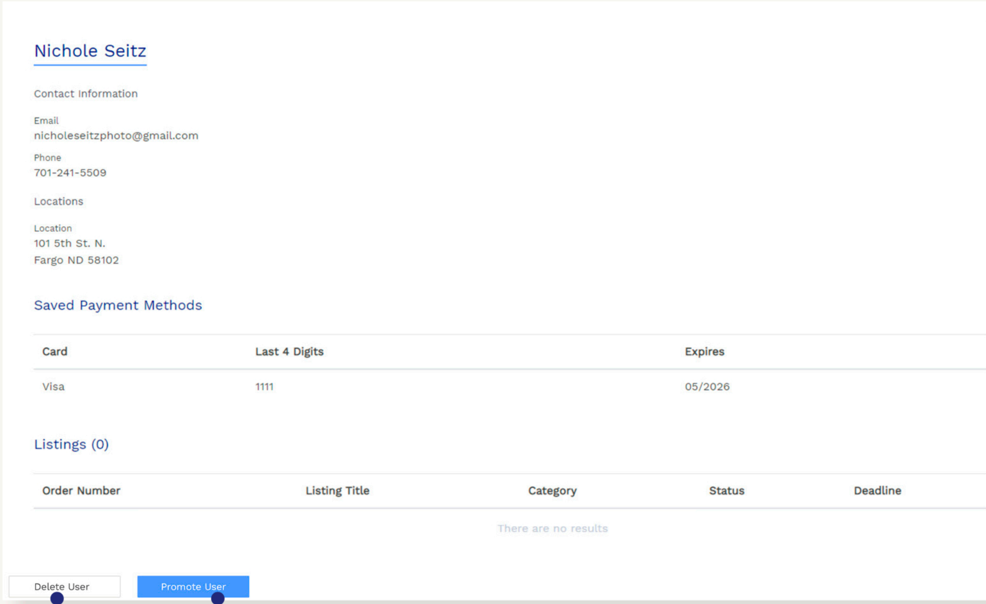




click here

You do have the ability to give more than one team member "Admin access" to the account. Just go back to your team members and click the arrow.

If you want to promote or delete a user, you can see those options listed at the bottom of the screen. You can also see all of the listings that team member has created.



choose here