



Advantage 2.0

LeasePolice™

Export

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## Introduction

This is the LeasePolice Export, created by Preferred Business Solutions, for use with Advantage 2.0. The LeasePolice Export gives you the ability to export information about Lessees, Guarantors, and Vendors directly to LeasePolice.com from within your Advantage program. This information allows you to check their performance history.

## Getting Started

### *Prerequisites*

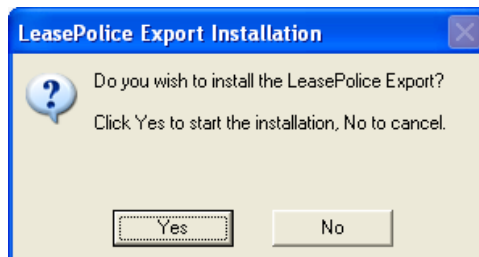
Before you install the LeasePolice Export and start exporting from Advantage, make sure you have the following:

1. You must receive all of the following information from LeasePolice:
  - User Name
  - Password
2. You need to have PBS Advantage version 2.0.417 or higher installed to use the LeasePolice Export utility.
3. The local machine, where Advantage and the LeasePolice Export are installed, must be connected to the internet during the LeasePolice export process.
4. Your browser must accept scripts and ActiveX from this website in order for it to work.

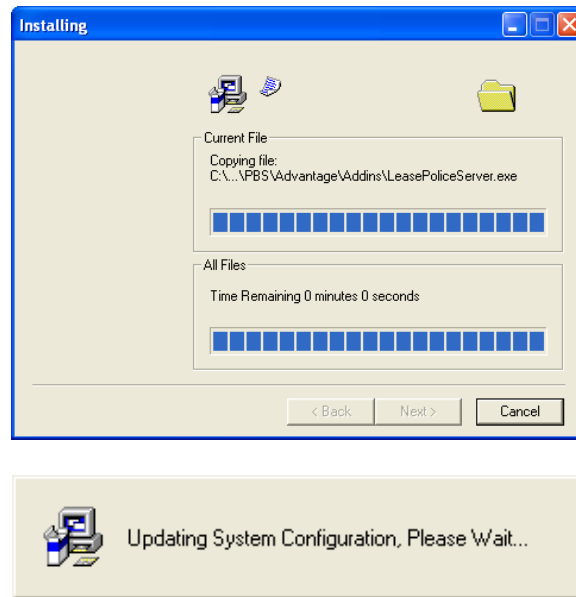
### *Installing Export*

The LeasePolice Export module must be installed on the local machine before you can export lease applications to LeasePolice. To install the LeasePolice export, do the following:

1. Navigate to the hard drive location where you downloaded the "LeasePoliceSetup.exe" file from the PBS download site.
2. Double-click the LeasePoliceSetup.exe file from your hard drive location to start the installation. You will start receiving the following dialogs.



3. Click the **[Yes]** button to start the LeasePolice Export.



4. These dialogs will be displayed during the installation process. During this time, the LeasePolice Export will copy the necessary LeasePolice Export files to the Addins folder of the Advantage folder on the local machine and update the local Registry. Once the installation is complete all of the dialogs will be closed.
5. You will now have the LeasePolice Export as an Export option in your Advantage program.

## Settings

To export Vendor and Lessee information to LeasePolice, your data must be properly formatted in Advantage for LeasePolice to use the data.

### *Fields in Advantage*

The following fields within Advantage are available to be used by the AutoFill option within the LeasePolice Export module.

- Company Name
- Company Address
- Company City
- Company State
- Company Zip Code
- Company Phone
  
- Guarantor First Name
- Guarantor Last Name
  
- Vendor Contact Name
- Vendor Address
- Vendor City
- Vendor State
- Vendor Zip Code
- Vendor Phone

### *Setting up fields in Advantage*

- All Phone numbers must be in the format XXX-XXX-XXXX. If they are not, then you will receive an invalid data dialog, refer to the Troubleshooting section later in this guide.

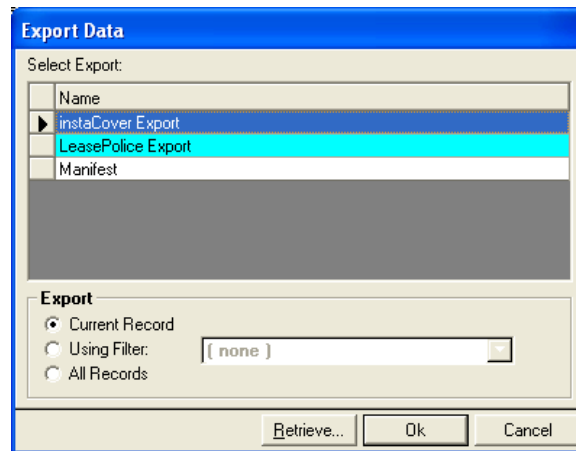
## Using the Export

### *Exporting from Advantage*

Below are the steps to export information from Advantage to LeasePolice using the LeasePolice Export module.

- 1) Open Advantage and go to the Customer record you wish to export to LeasePolice.
- 2) Select the Export option from the File menu within Advantage or use the Export

Icon .



- 3) Select the LeasePolice option from the Export Data dialog. Ensure the "Current Record" option is selected in the Export section. Only the "Current Record" option can be used to export to LeasePolice. You cannot use either "Using Filter" or "All records" options, when using the LeasePolice export. If you try to use one of these options, you will receive the following message:



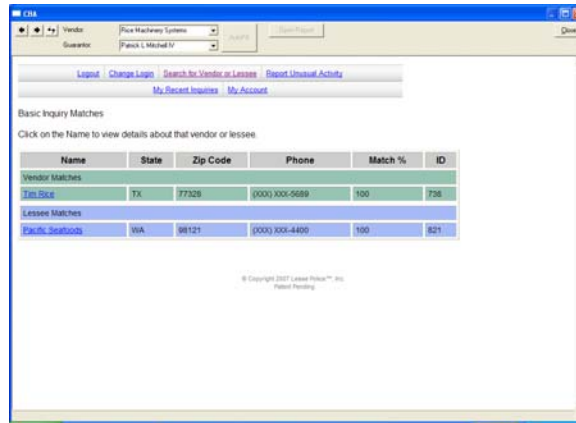
Clicking the [OK] button closes the entire Export feature and takes you back to the main Advantage screen.

- 4) Once you have the options selected in the Export Data dialog, click the [OK] button to start the LeasePolice Export module.

- 5) Enter your *User Name* and *Password* that you received from LeasePolice.
- 6) Click on the **[Login]** button to continue the LeasePolice Export. Or, you can click on the **[Cancel]** button to cancel the LeasePolice Export.

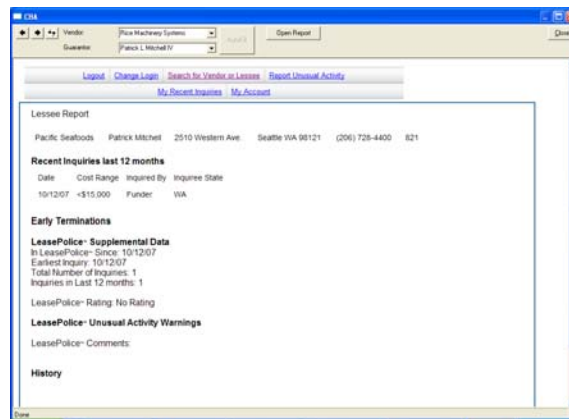
- 7) Each time you open the Lease Police dialog, it will be blank.
- 8) There are two ways to enter information into the LeasePolice Export.
  - a) Enter information manually in the entire search information dialog.
  - b) Or, select a Vendor and Guarantor from the top of the screen, then choose the Autofill option by clicking on the **[AutoFill]** button. The fields will be filled in from the current Customer record. To choose this option, you must have both a Vendor and a Guarantor selected.
- 9) Verify all of the information that is currently displayed.
- 10) When you are sure all of the information on this dialog is correct, click on the **[Search]** button at the bottom of the screen.





If this is the first time a search has been requested for all entities, the resulting information will be blank. If the Vendor or Guarantor has information recorded by LeasePolice in the past, then the record will be listed.

- 1) Click on a Vendor Name or Lessee Name to view the detailed information for the Customer.



- 2) To go back to the Basic Inquires Matches, click on the [←] button at the top of the screen.
- 3) Or, click on one of the other options to go to a different feature.

## Advanced Features

### Change Login

You can change your Login or your Password from this dialog.

- 1) To get to this feature, click on the Change Login option at the top of the main screen.

- 2) Enter the information as requested.
- 3) Click on the **[Change]** button to change your Login or Password.

### Report Unusual Activity

This allows you to report any unusual activity for this Vendor or Lessee.

- 1) To get to this feature, click on the Report Unusual Activity option at the top of the main screen.

- 2) Manually enter the information as requested.
- 3) Click on the **[Submit]** button to submit your report.

## My Recent Inquires

This allows you to enter a start date and an end date to review your recent Inquires.

- 1) To get to this feature, click on the My Recent Inquires option at the top of the main screen.

- 2) Enter the *Start Date* and *End Date*.
- 3) Click on the **[Submit]** button to run your report.

Name	Phone	Address	City	State	Zip	First Name	Last Name	Cost Range	State	Date
<b>Vendor Searches</b>										
Test Vendor (Record)	8663528665	1001 NW 100th St #20	LYNNWOOD	WA	98123	Bill	Smith	+\$15,000	WA	10/02/07
Tim Rice	2314335689	1428 E St Andrews Parkway	Austin	TX	77328	Tim	Rice	+\$15,000	WA	10/12/07
<b>Lessee Searches</b>										
Test Company 1	4257756591	101 NW 100th St	EDMUNDS	WA	98147	Fred	Smith	+\$15,000	WA	10/02/07
Pacific Seafoods	2067264400	2510 Western Ave.	Seattle	WA	98121	Patrick	Mitchell	+\$15,000	WA	10/12/07

## My Account

This allows you to edit your personal user information as saved in the LeasePolice database.

- 1) To get to this feature, click on the My Account option at the top of the main screen.



- 2) Enter your current password.
- 3) Click on the **[Submit]** button to access the My Account dialog.

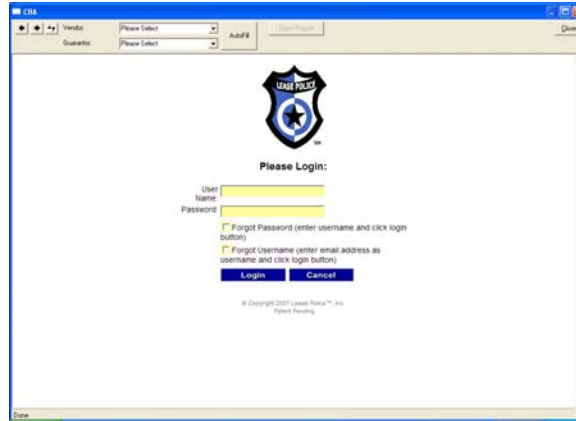


Note: If you entered the incorrect password, you will receive this message. Reenter the password, then click on the **[Submit]** button.

## Troubleshooting

### *Invalid User or Password*

If you continue receiving the Login dialog, as shown below, after entering your *User Name* and *Password*, then do the following:



- 1) Verify that you have the correct User Name and Password as supplied by LeasePolice.
- 2) Reenter the *User Name* and *Password*.
- 3) Click on the **[Login]** button.
- 4) If you continue having the same problem, contact LeasePolice to verify your User Name and Password.

### *Phone Number*

This field defines the Phone Number for the Lessee of the current Customer being exported to LeasePolice. You must enter a valid Phone Number. LeasePolice requires that the Phone Number be ten numeric digits in the format ###-###-####. If anything else has been entered in Advantage, then you will receive this dialog during the LeasePolice Export function.



- 1) Click the **[OK]** button.
- 2) You must then enter a valid phone number.
- 3) Then you can click on the **[Submit]** button again.