USER GUIDE

MYBUSINESS

V.5.01.23

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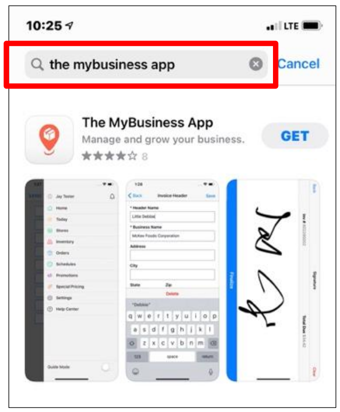
MYBUSINESS - DOWNLOADING THE APP

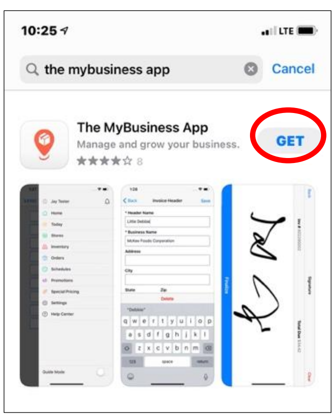
FEATURE SUMMARY:

This guide will show you how to access, download and login to the MyBusiness app from the App Store on your Apple Device. You will need to request access to the MyBusiness app at https://www.emckeeapps.com/DistributorAuth/#/newAccount.

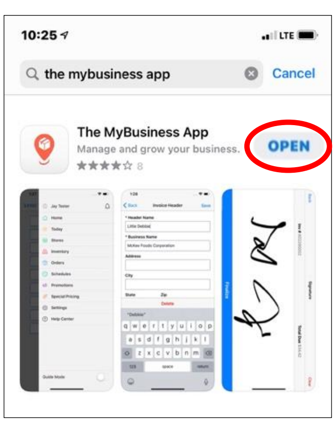
1. Open the App Store on your Apple Device and search for "The MyBusiness App".



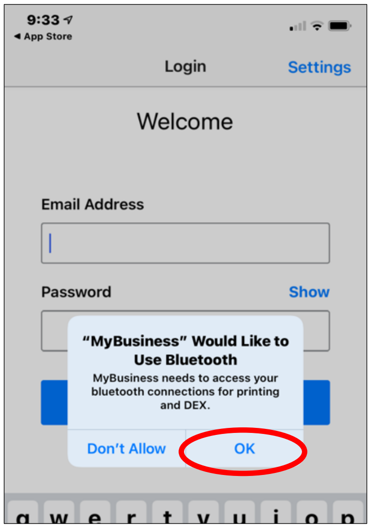
2. Tap "Get" to download the app to your device.



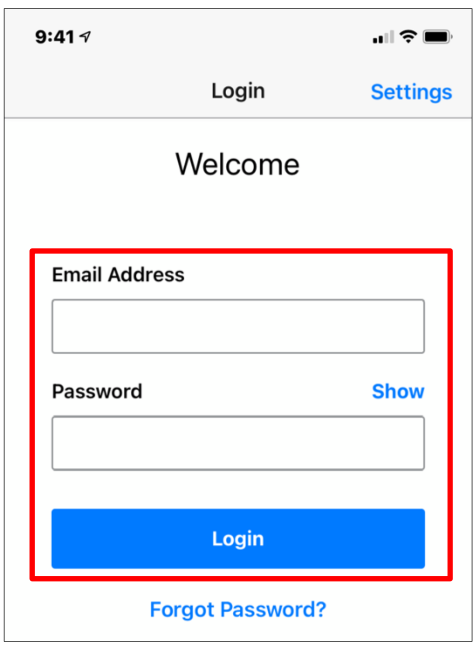
3. Once the app is downloaded on your device "Open" to access the MyBusiness app.



4. The following message will then appear. Tap "OK" to allow MyBusiness to access your Bluetooth connections for printing and DEX.



5. Next, enter your email and password. Tap "Login" to continue.



NOTE: *You will need to request access to the MyBusiness app at https://www.emckeeapps.com/DistributorAuth/#/newAccount.*

MYBUSINESS - PERMISSIONS

FEATURE SUMMARY:

This guide will show you how to set up permissions in the app. In order for a sales operator to use the MyBusiness app, the distributorship's principal needs to create a Distributor Mobile account for the sales operator, if one has not been created. They then should assign permissions in Distributor Mobile and in the MyBusiness app. Below are the steps to complete both of these.

SET UP IN DISTRIBUTOR MOBILE

1. Access Distributor mobile at www.emckeeapps.com/container
2. After logging in, tap the authentication app.
3. Tap invite and enter the email address and phone number for the sales operator.
4. Tap the location(s) they will need access to.

   NOTE: *If the sale operator has been designated as a manager, the principal will need to designate a primary territory for them.*

5. A notification will appear stating that the invitation email has been sent.
6. The sales operator will then need to open the email and follow the instructions there to complete the creation of their account.

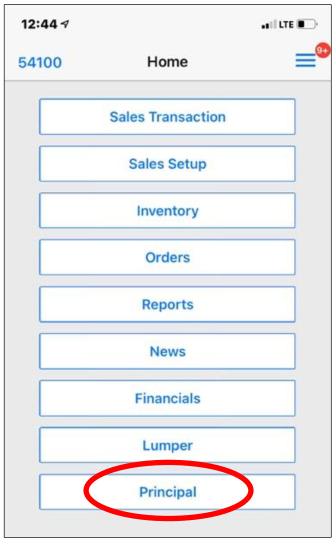
   NOTE: *In the Authentication app under the sales operator user access, the principal can modify the location operator's permissions. By default, the location operator is given certain permissions. It is suggested that the principal review these and change if needed.*

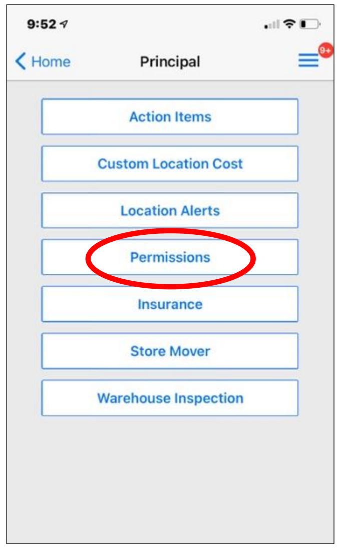
7. Then, tap the plus icon to add, and again to remove.

NOTE: *Principals can review more detailed permission information from the Pocket Guide app in Distributor Mobile.*

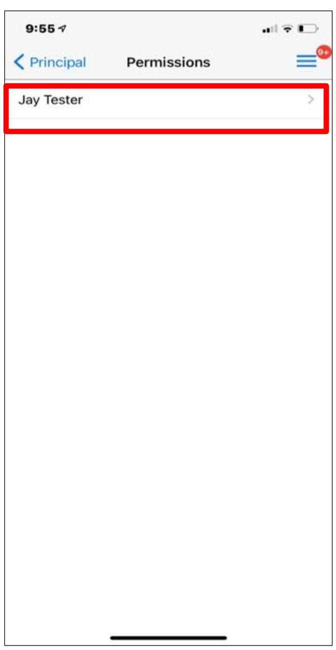
SET UP IN MYBUSINESS

1. From the home screen in MyBusiness, tap “Principal”. Then, tap “Permissions”.

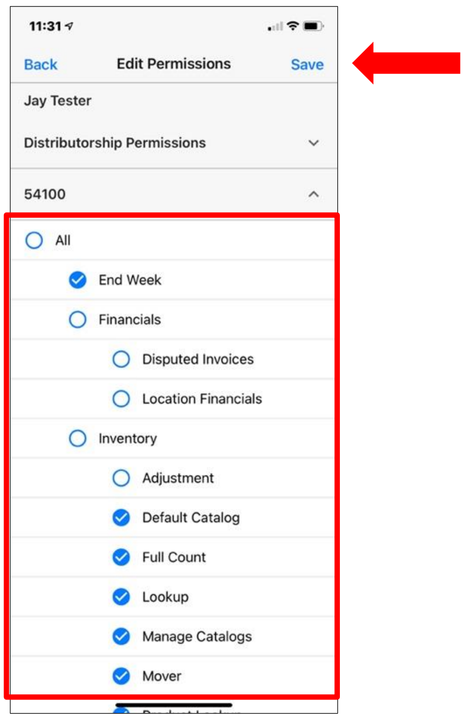




2. Tap the sales operator that you would like to modify.



3. Tap the workflows that you would like to give the sales operator access to. Tap “Save” once the desired selections are made. The sales operator will now be able to log into and use the MyBusiness app.



NOTE: *Permissions can be given across all locations or by individual location.*

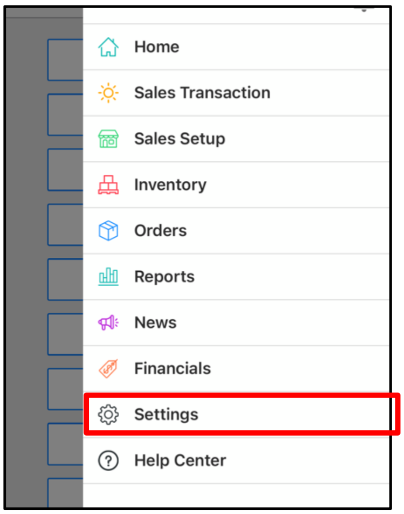
PERMISSIONS SHOULD BE REVIEWED REGULARLY

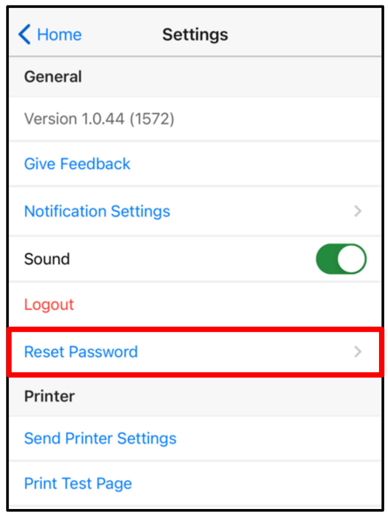
MYBUSINESS – RESETTING YOUR PASSWORD

FEATURE SUMMARY:

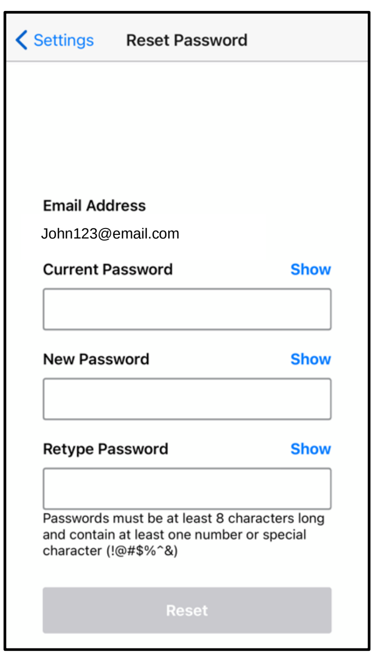
MyBusiness will allow you to reset your password within the app. You must know your current password in order to set a new one.

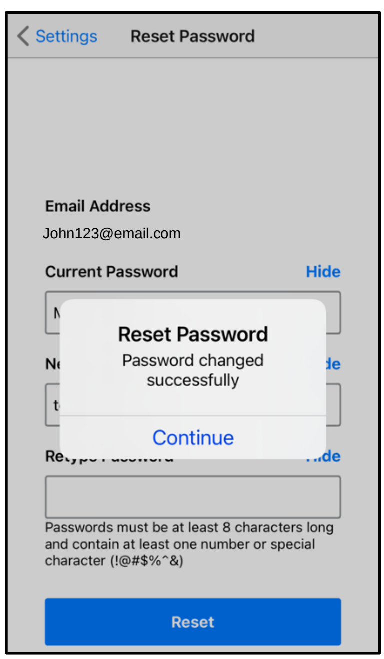
1. From the Home Screen or the three-bar menu, tap “Settings.” Tap “Reset Password.”





2. Type your current password in the appropriate field and then type the password you wish to change it to, then type “Reset.” Tap continue to return to the home screen.



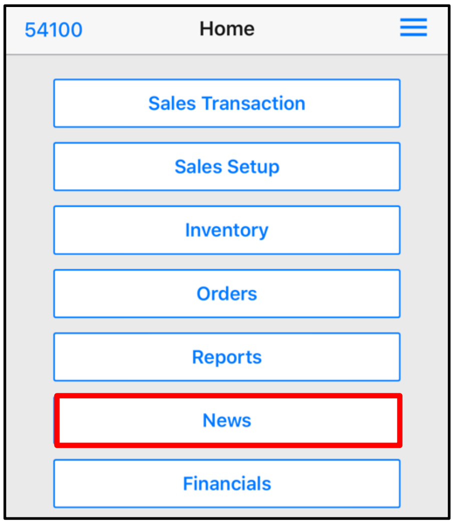


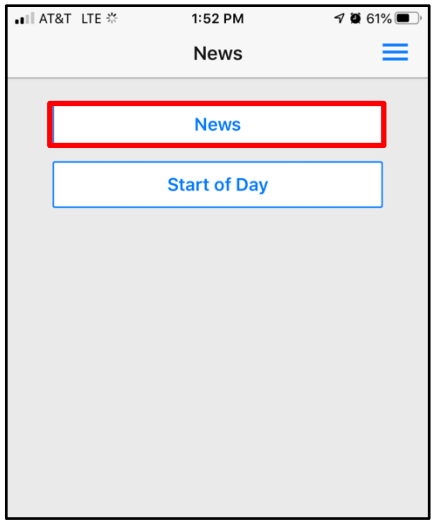
MYBUSINESS - NEWSSTAND AND START OF DAY

FEATURE SUMMARY:

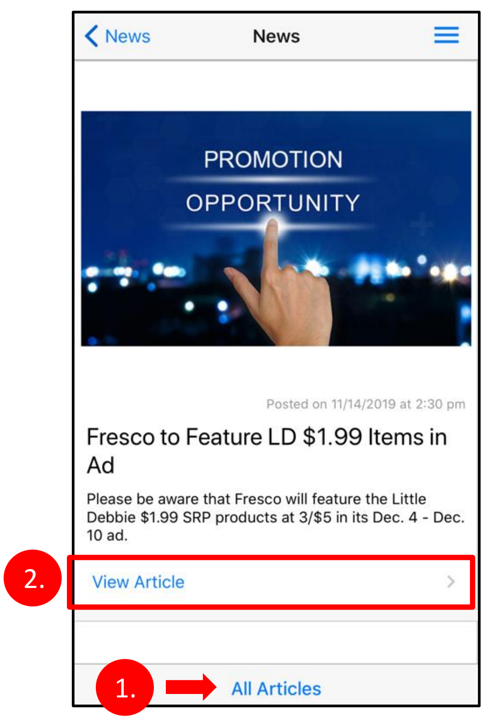
MyBusiness users will now be able to view Newsstand articles and start of day messages in MyBusiness.

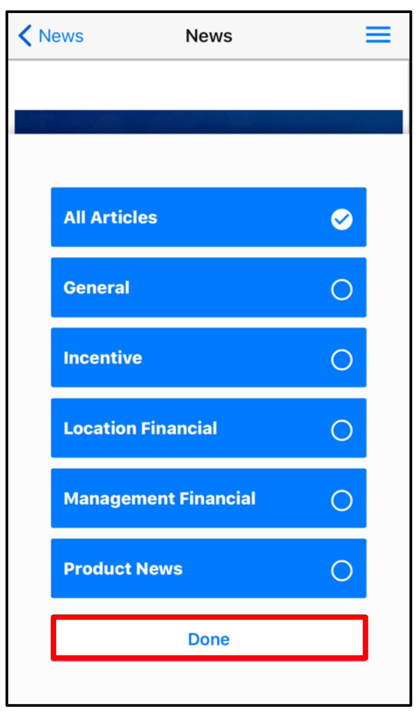
1. From the Home Screen, tap “News.” In the News menu, you will see “News” for Newsstand articles and “Start of Day” for start of day messages. Tap “News” to see a list of snapshots for various articles.

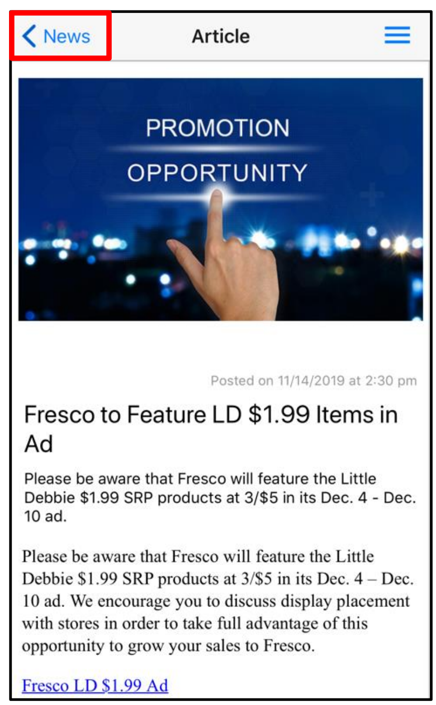




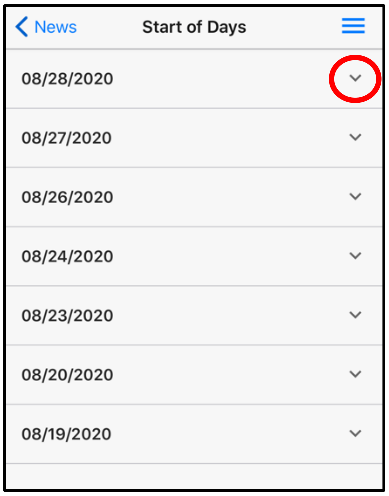
2. At the bottom, if you tap “All Articles,” a menu will appear allowing you to filter the list of articles. Tap Done. Then, tap “View Article” to see the details of an article you are interested in viewing. You can tap “News” again to return to the news menu.

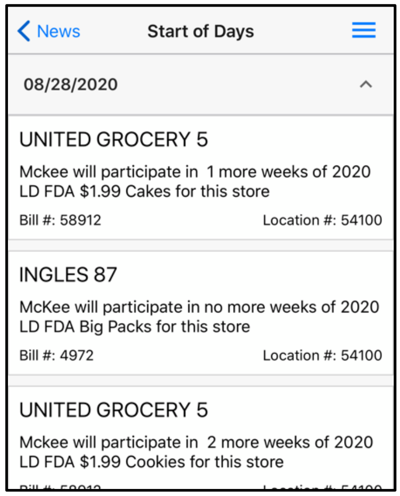






3. The Start of Day messages are similar to the Newsstand messages. When you tap “Start of Day,” you will see a list of dates. Tap the chevron to open up the messages for that day. You will then see a list of messages for your location for that day.

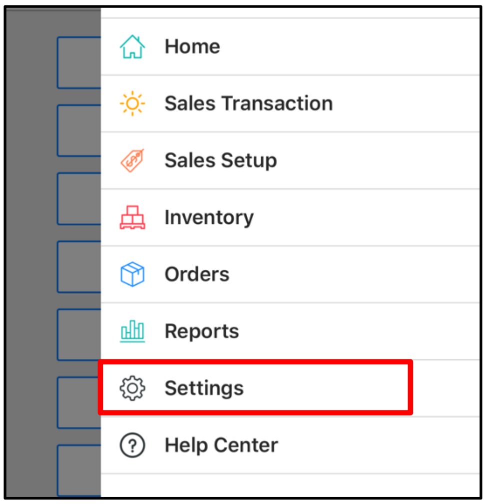


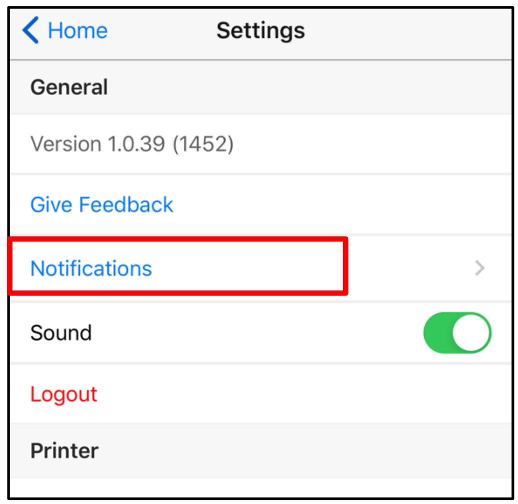


MYBUSINESS - PUSH NOTIFICATIONS

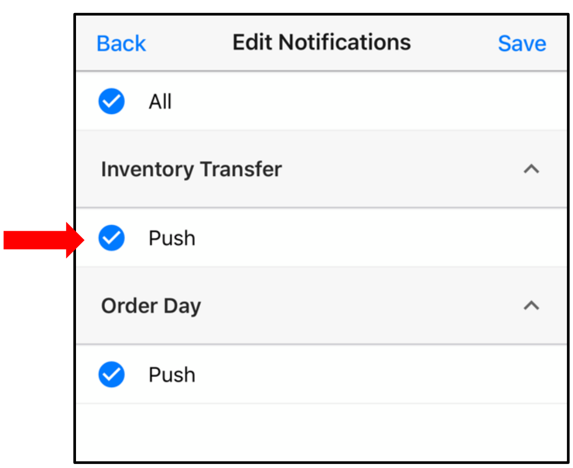
FEATURE SUMMARY:
My Business users will notice a new feature for alerting users to inventory transfers and reminders for order day. These push notifications can be very useful for managing your business. However, if you wish to turn them off for a time period, follow these steps.

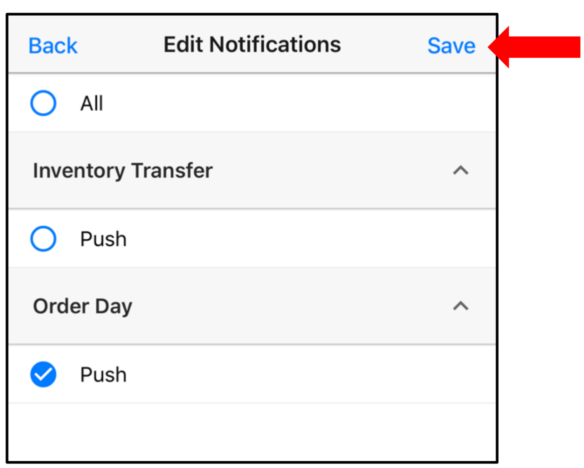
1. From the Home Screen or the three-bar menu, tap "Settings." Tap "Notifications."





2. Tap on the blue circle of the notifications you do not wish to receive. Tap "Save."



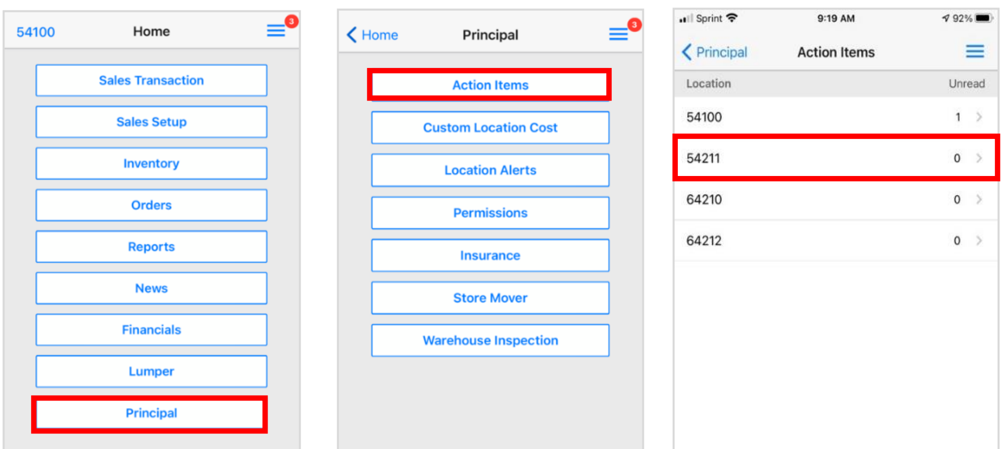


MYBUSINESS - ACTION ITEMS

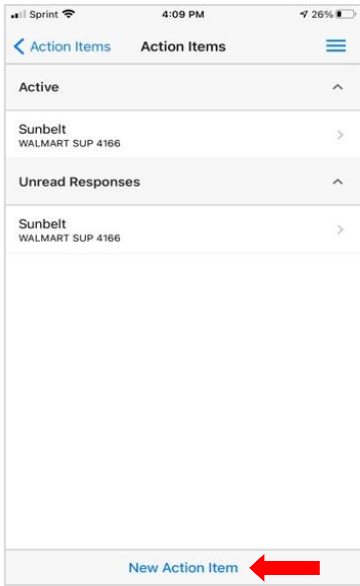
FEATURE SUMMARY:
My Business Principal Distributors will now be able to message their location operator employees in the MyBusiness App. This feature is an excellent way for principal distributors to choose to communicate with a location operator about a specific store they sell to in their business.

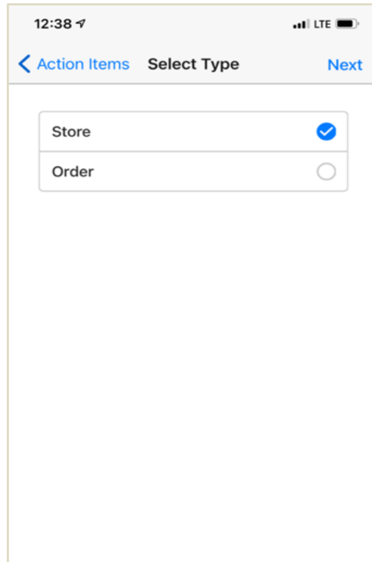
There are 3 categories of messages/action items. When the principal creates an action item, it will go into the "Active" folder. When the LO completes a task and replies to the principal, the action items is classified as "Unread." When the principal reads the response, the item will move to the "Completed" folder. Store Action Item workflow is detailed below, however, process is identical to the Order Action Item. The main difference is that instead of selecting a store to apply the action item to, a principal can select a specific order night or "All Future Orders." If they select "All Future Orders", the action items will show up when viewing any current or future order. If the Location Operator responds to the action item on one of the orders, it will be removed from all of the orders.

From the home screen, tap "Principal." Then tap "Action Items." Tap a location to message.

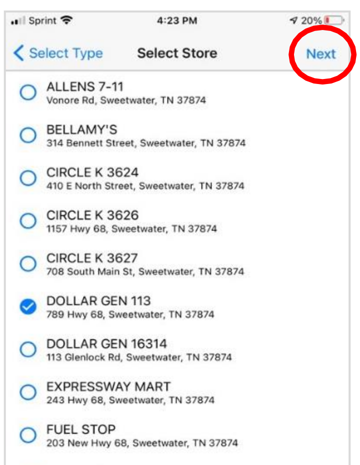


1. To begin, tap "New Action Item." Select the type of message and then tap "Next.

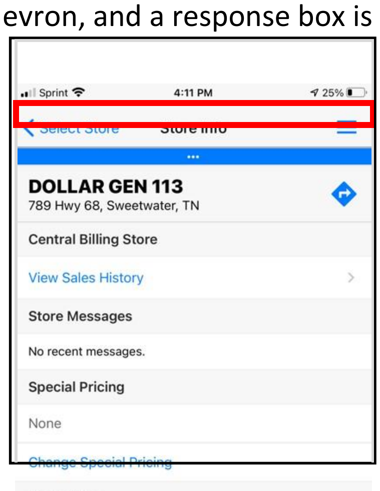


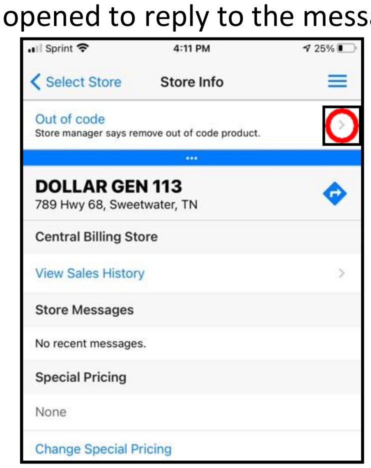


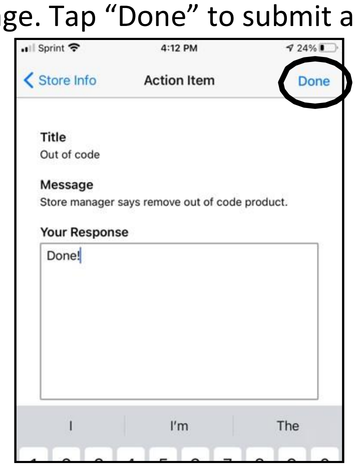
2. The principal can then tap the store to send an action item for that specific store and then tap "Next." Enter a title and then a message, then tap "Save."



3. The location operator will see the message initially as a blue bar at the top of the store information page. When the blue bar is tapped, the action item will open. Tap the right-facing chevron, and a response box is opened to reply to the message. Tap "Done" to submit a

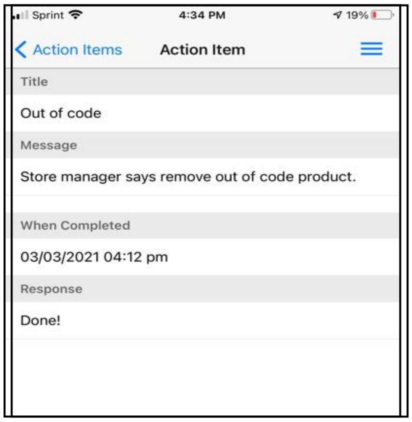






response to the principal.

4. The principal distributor will be able to view any communication in the Action Items menu option under unread messages or completed.

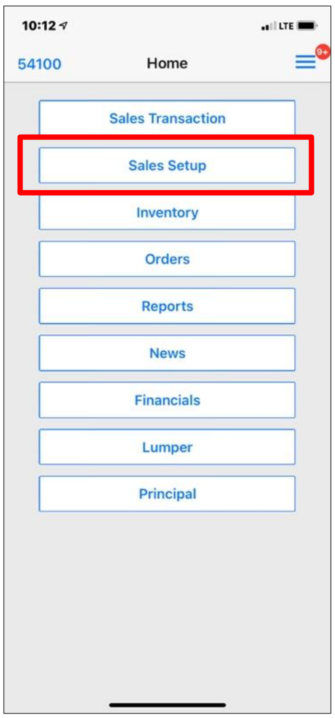


MYBUSINESS - INVOICE HEADERS

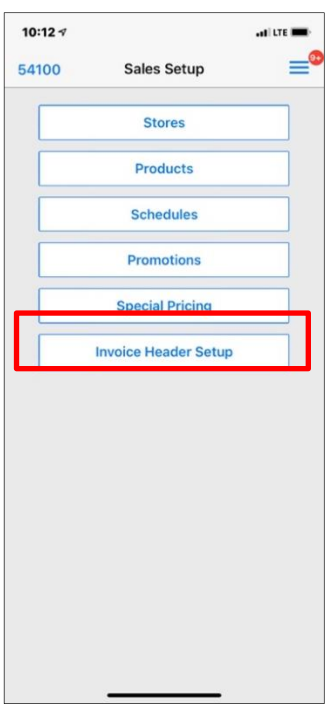
FEATURE SUMMARY:
This guide will show you how to create invoice headers in the MyBusiness app.

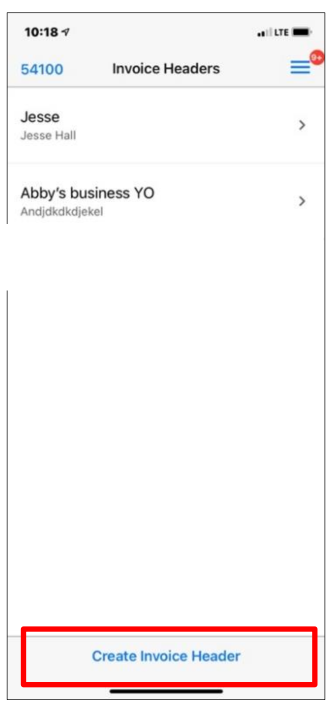
NOTE: *Central billing stores do not use the invoice headers created in the app.*

1. From Home Screen tap “Sales Setup”.

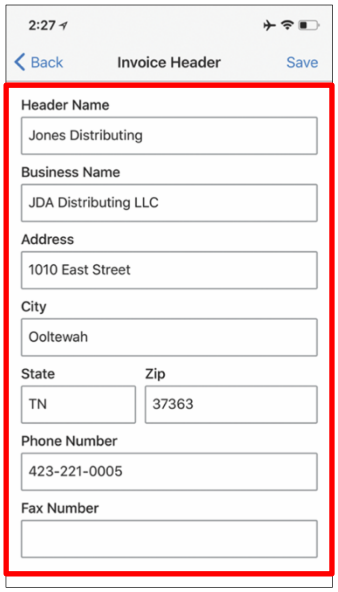


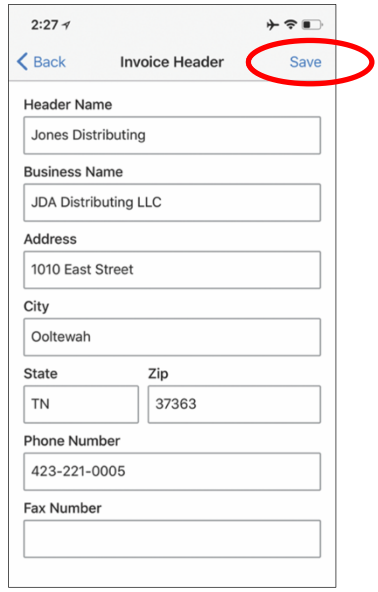
2. Tap “Invoice Header Setup”, then tap “Create Invoice Header”.





3. Enter in a name for the header and your business info. Then tap “Save”.





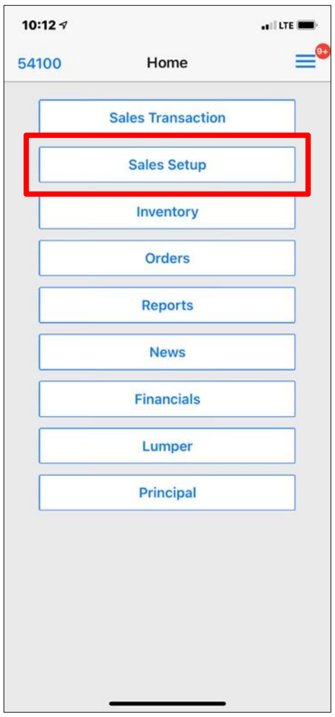
NOTE: *Central billing stores do not use the invoice headers created in app.*

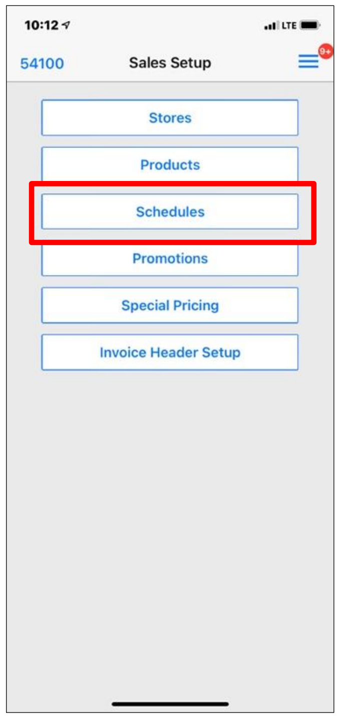
MYBUSINESS - BUILDING A SCHEDULE

FEATURE SUMMARY:

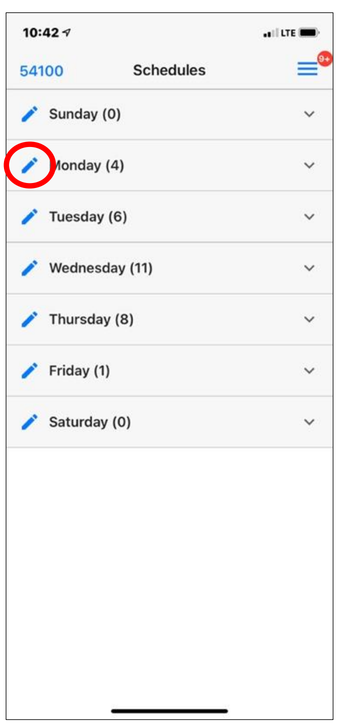
This guide will show you how to build daily schedule. Although building a schedule is optional, it can be very helpful for maximizing your time.

1. From the Home Screen tap “Sales Setup”. Then tap “Schedules”.

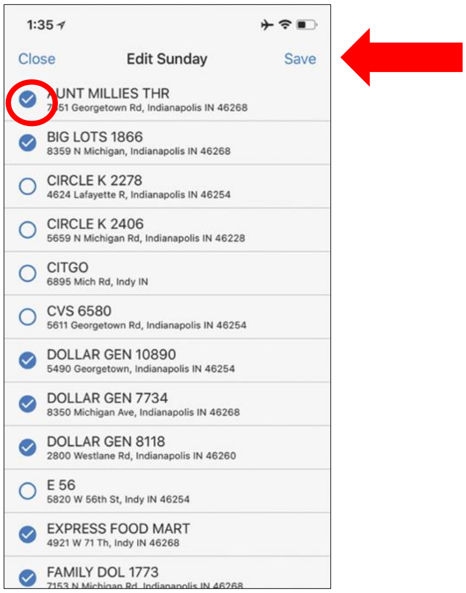




2. Tap the pencil icon next to the day you would like to change.

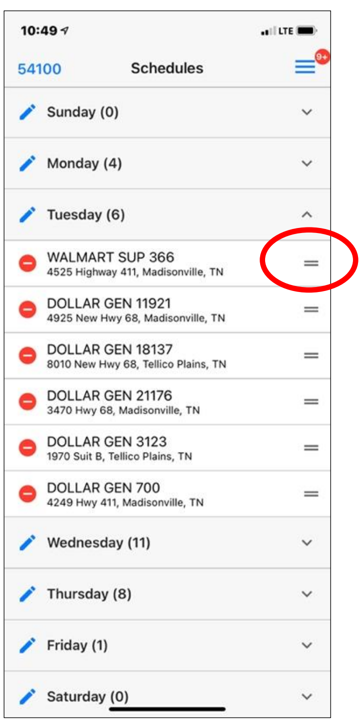


3. Tap the circle next to the stores you would like to add. Then tap “Save”.



NOTE: *Stores are added to the list in the order they are tapped.*

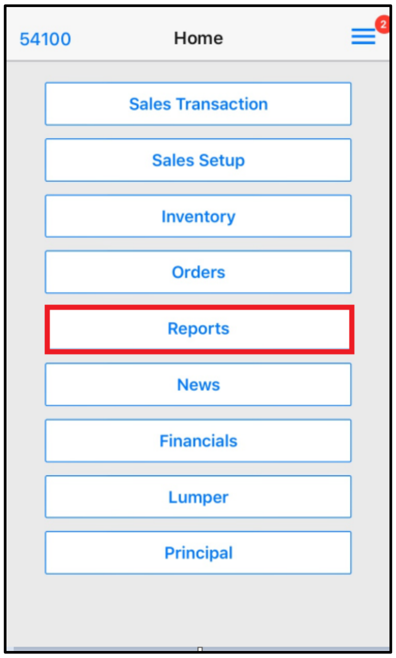
5. Tap and hold the bars on the right to change the order.



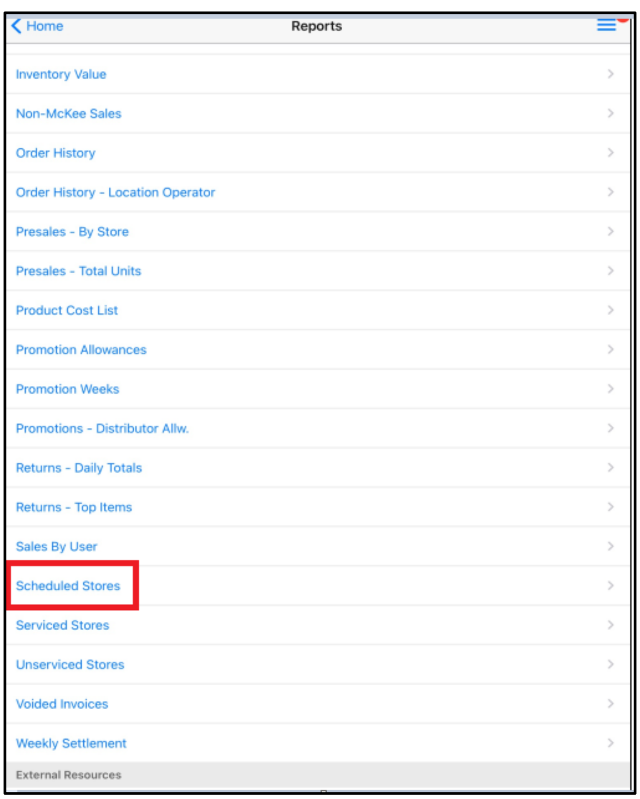
MYBUSINESS – PRINTING A DAILY SCHEDULE

Feature Summary:
This guide will show you how to print a daily store schedule

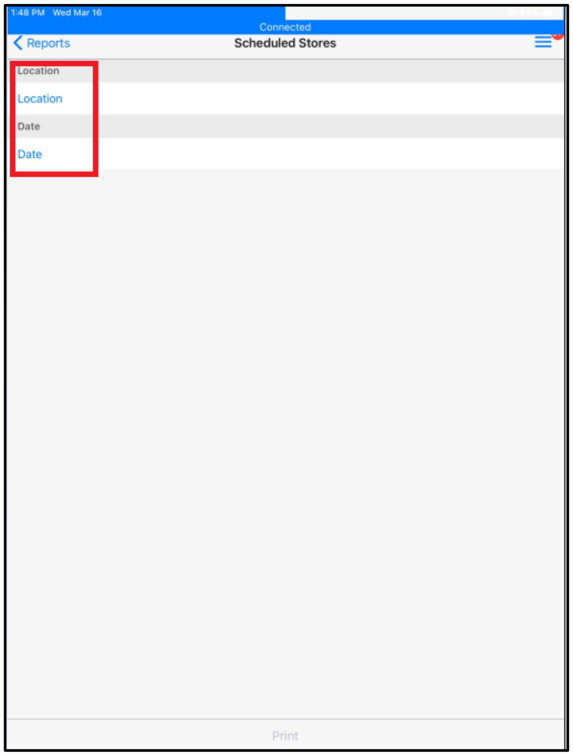
1. From the home page select reports.



2. Then select Scheduled Stores

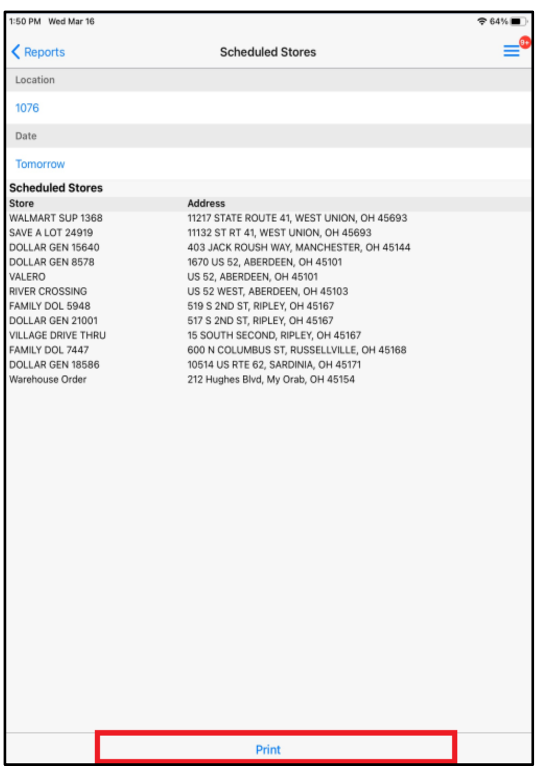


3. Select the Location number and Date



4.

Select Print at the bottom. It will print the store name and address for the selected day.
(You must have a daily schedule set up to be able to print one.)



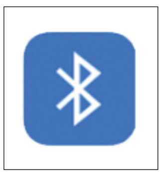
MYBUSINESS – PAIRING THE PRINTER

FEATURE SUMMARY:

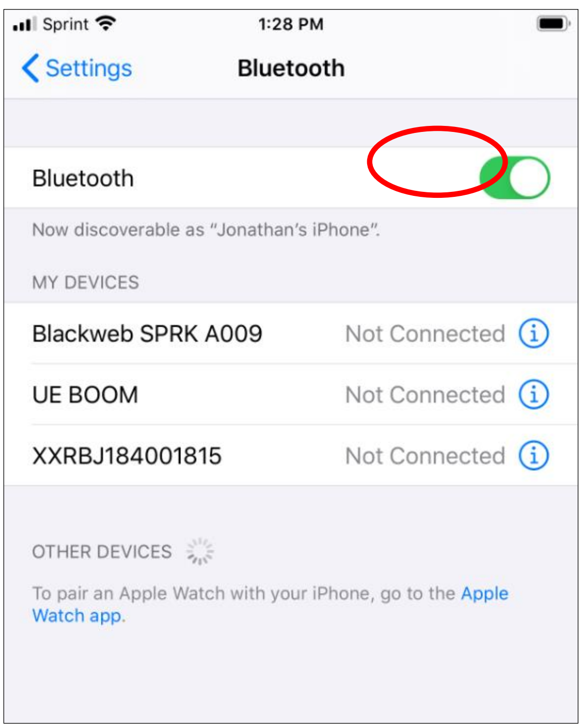
This guide will show you how to pair the Zebra printer to the MyBusiness app.

1. Open your phone's “Settings” app.

2. Tap “Bluetooth”.

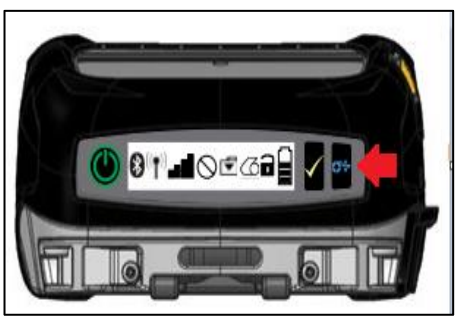


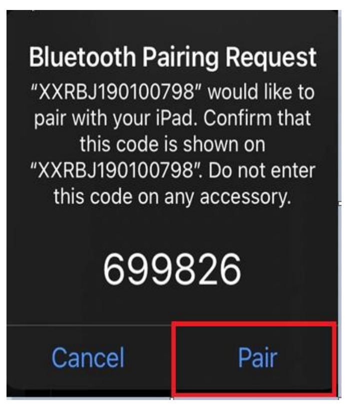
3. Make sure “Bluetooth” is turned on.

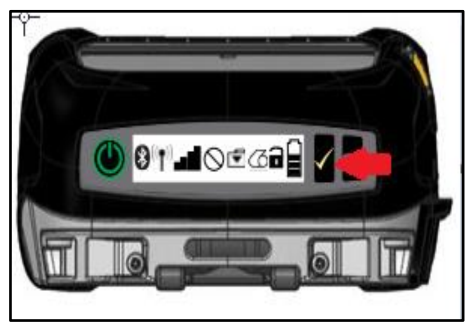


4. On your phone, tap on the Bluetooth device with the same number. (SN# usually start with XXRB…) The printer should show connected.

5. If the printer SN# does not show up in your Bluetooth settings screen, Hold in the blue paper feed button on the far right of the printer until the BT icon starts flashing on the printer screen. Once it starts flashing, it should also come up on the device (phone) screen. Select "Pair" on the prompt then immediately press the yellow check mark button on the printer.

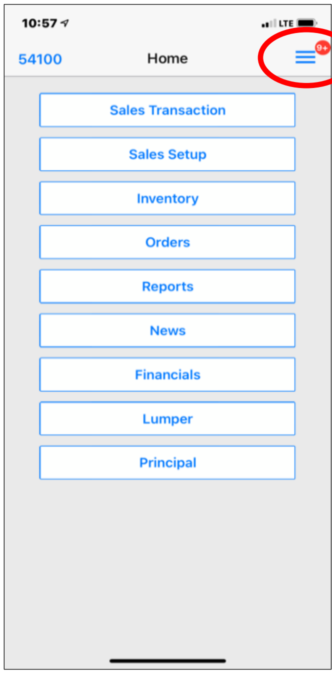


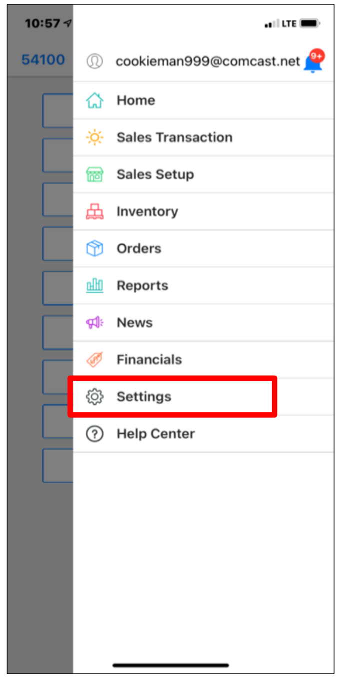




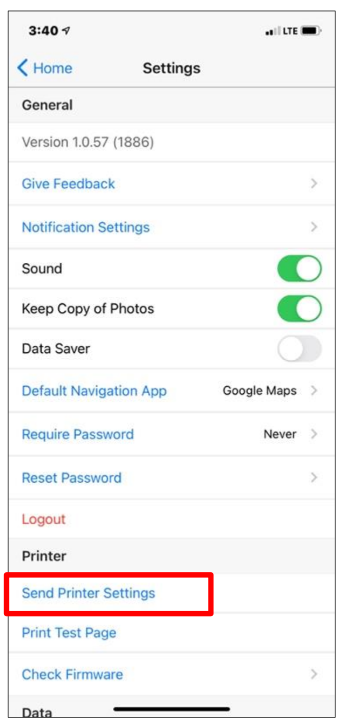
6. The printer will show it is connected

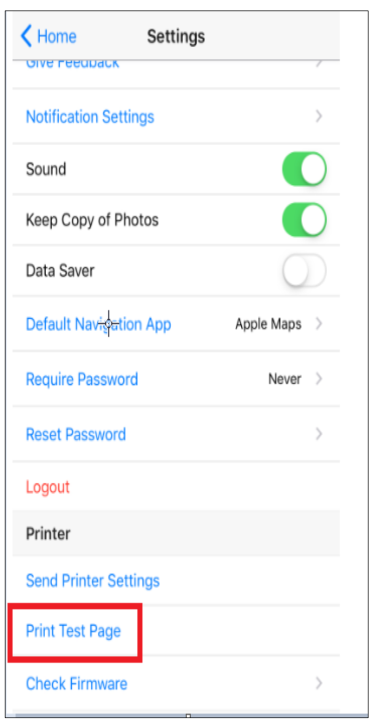
7. With the printer paired, return to the home page of the MyBusiness app. Tap on the three bar icon, then select Settings.





8. Tap "Send Printer Settings." After the settings have been sent, select "Print Test Page."



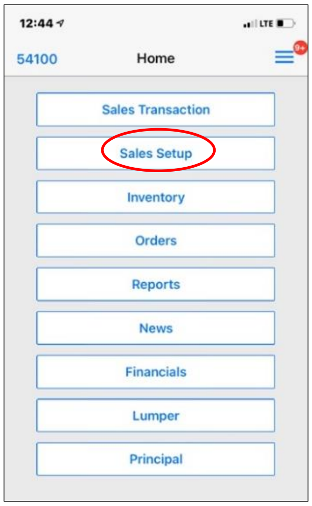


NOTE: *BE SURE TO REGULARLY CHECK YOUR FIRMWARE. IF YOU TAP ON CHECK FIRMWARE AND YOU SEE A BUTTON THAT SAYS UPDATE FIRMWARE, THEN GO TO THE MEDIA SECTION OF THE MYBUSINESS HELP CENTER FOR A TUTORIAL ABOUT UPDATING FIRMWARE.*

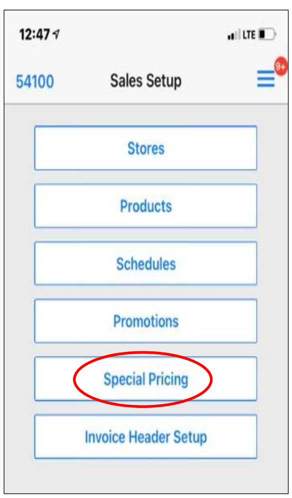
MYBUSINESS - *SPECIAL PRICING*

FEATURE SUMMARY: This guide will show you how create special pricing on products you sell to retailers.

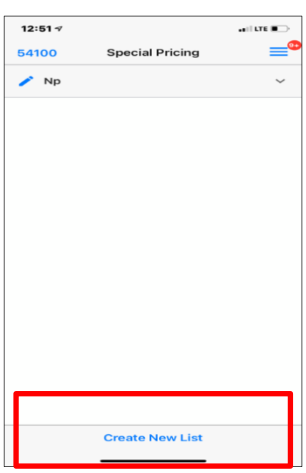
1. Tap “Sales Setup” on the Home Screen, then select “Special Pricing.”



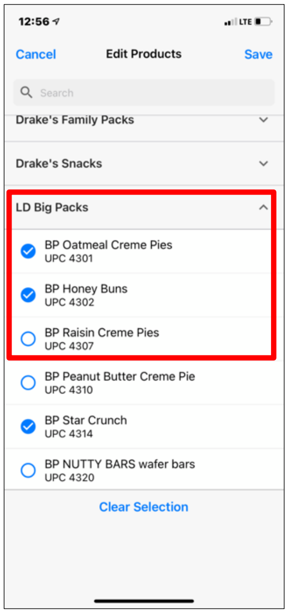
2. Select “Special Pricing.”

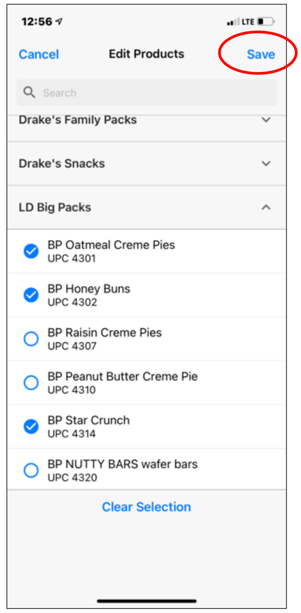


3. Tap “Create New List”, then “Name” your list and tap “Next”.

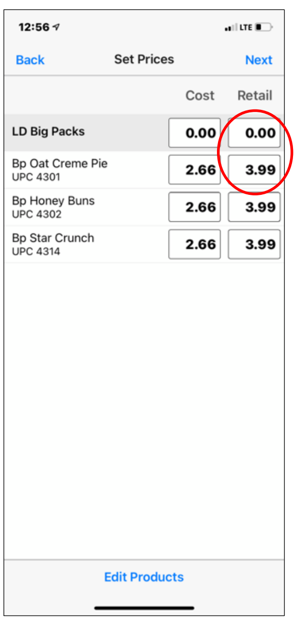


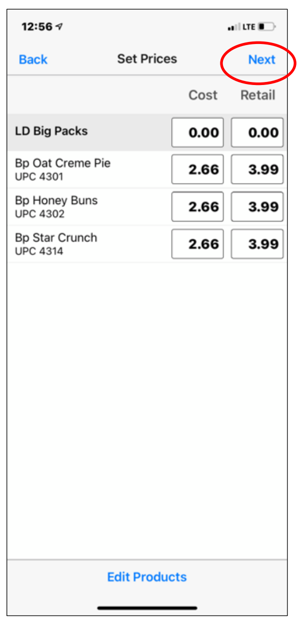
4. Tap each product line you wish to modify. Then select the individual product you wish to modify by tapping in the circle next to the product name. Then tap “Save”.



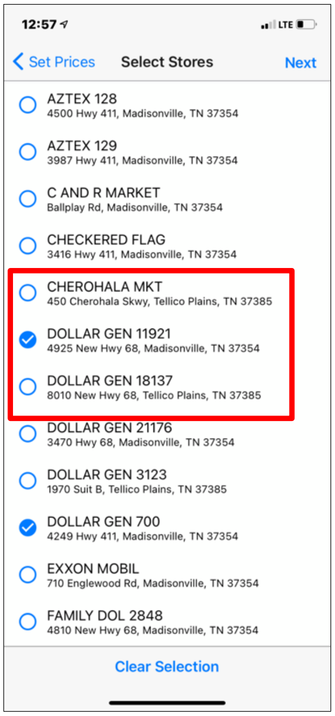


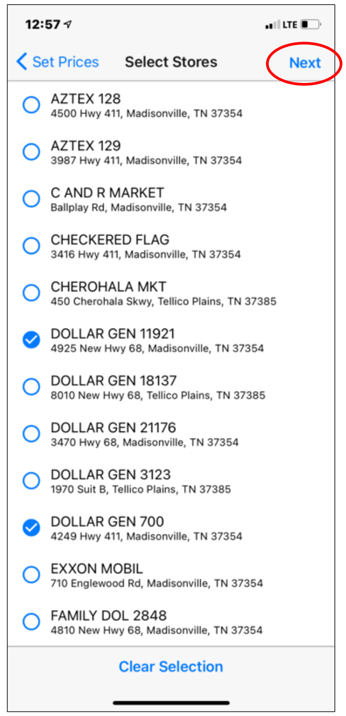
5. Change the pricing for each product line or by individual item. Then tap “Next”.



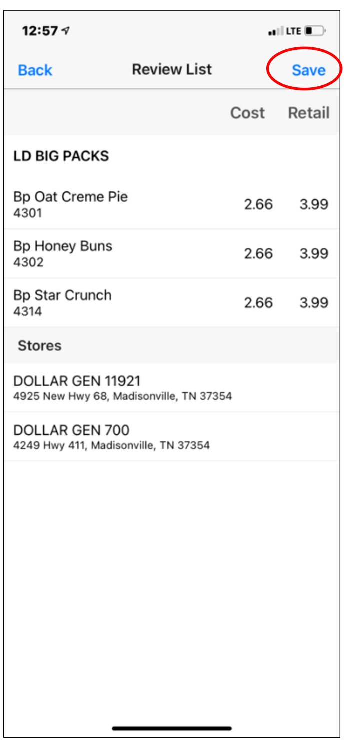


6. Next, select the stores that will use this special pricing by click on the circle next to the store name. Then tap “Next”.





7. Review your selections then tap “Save”.

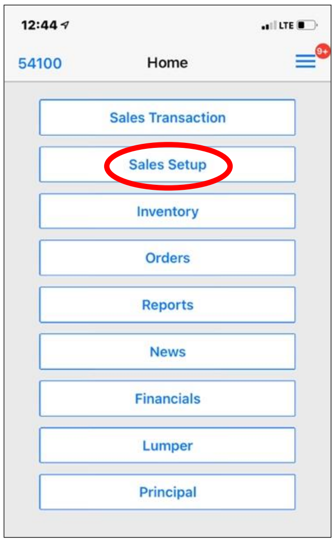


NOTE: *Each store can only be associated with one single special pricing list. The latest list added to the store is the one that is active. However the system saves all previous prices and promotions for reference.*

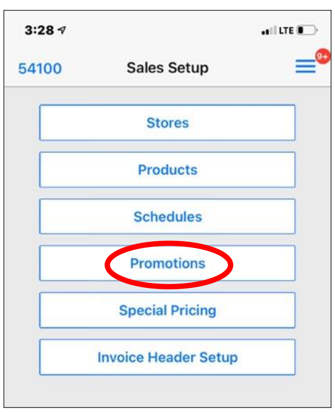
MYBUSINESS - SETTING UP PROMOTIONS

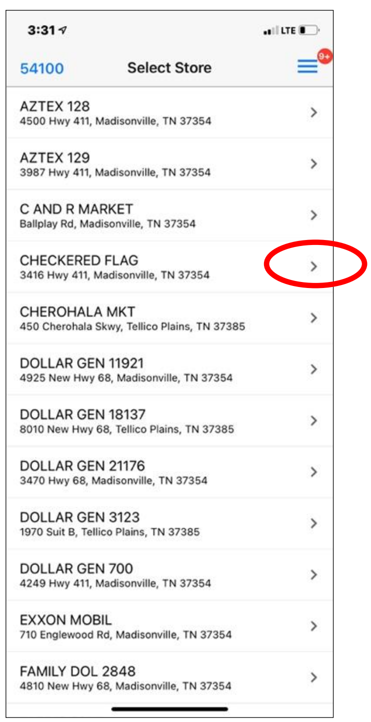
FEATURE SUMMARY: This guide will show you how to set up promotions in the MyBusiness app.

1. From the Home Screen tap "Sales Setup".

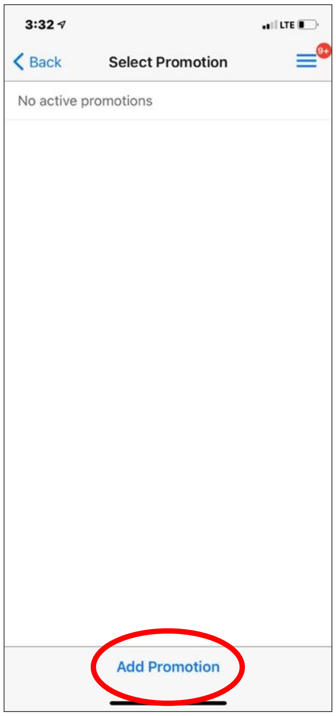


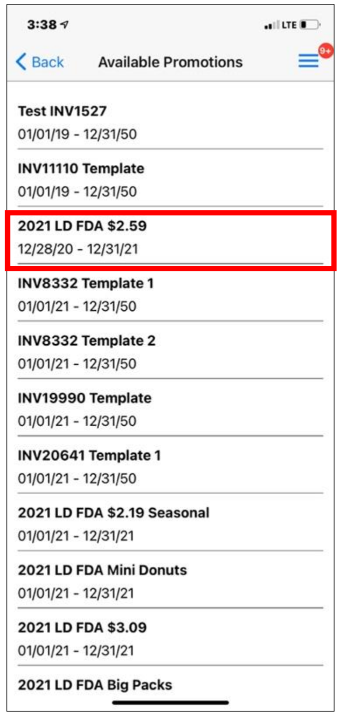
2. Tap "Promotions". Next, select the stores that you would like to add the promotion to by clicking on the chevron beside the store name.



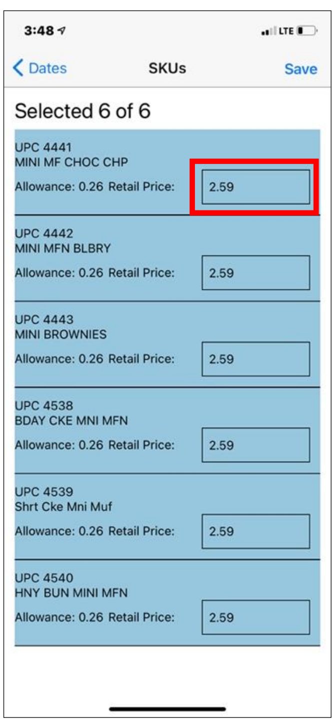


3. Tap “Add Promotion” and select the promotion you would like to apply. You can then edit the start and end dates for the promotion. Then, tap “Next”.





4. All applicable products will then be displayed. Pricing can be adjusted by tapping on the box to the right of the product name. Then, tap “Save”.

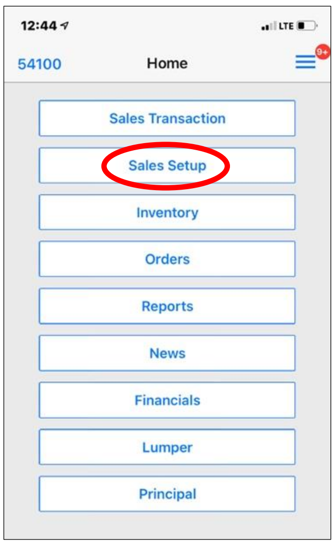


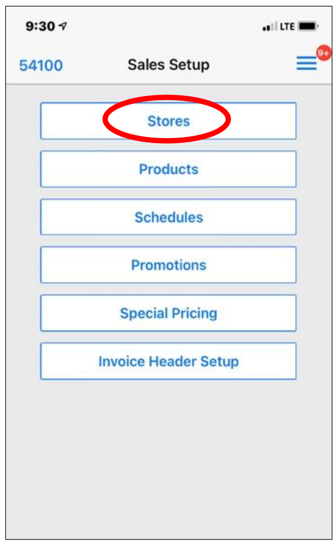
MYBUSINESS - BUILDING SHELF SETS

FEATURE SUMMARY:

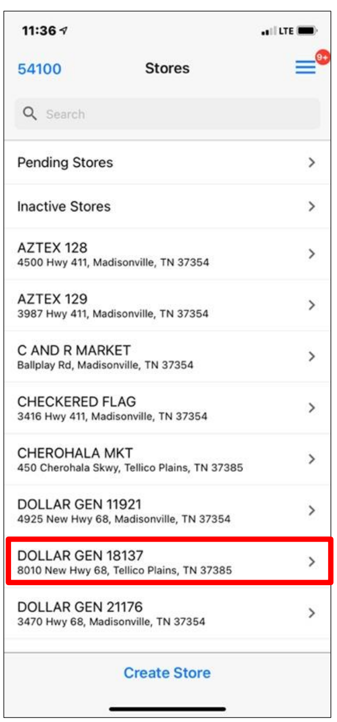
This guide will show you how to build a shelf set. Building a shelf set is the first step in selling products to a store. Once a store is selected, you can build a shelf set for that store. Building a shelf set determines the order items appear on the screen. In addition, building multiple shelf sets will allow you to see how products sell in different locations in the store.

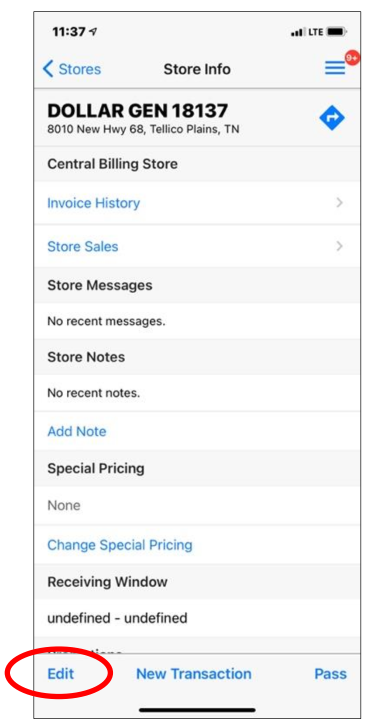
1. From the Home Screen tap “Sales Setup”. Then tap “Stores”.

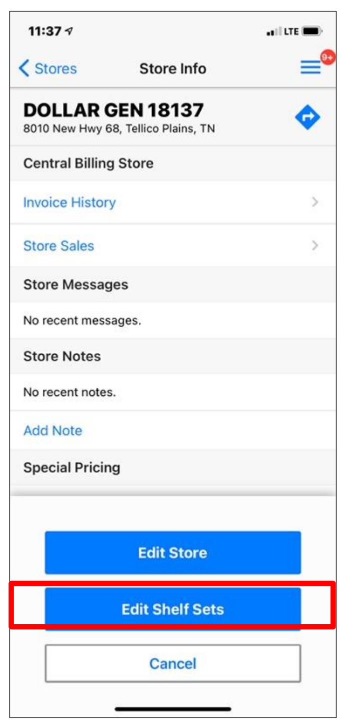




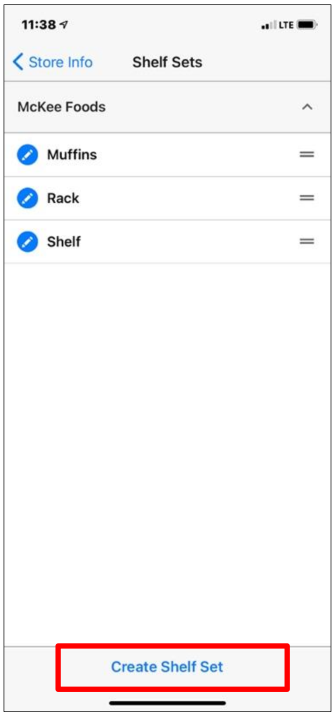
2. Select a Store, tap “Edit”, then tap “Edit Shelf Set”.

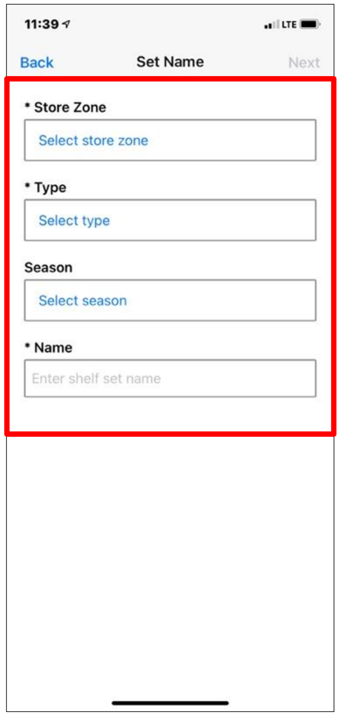


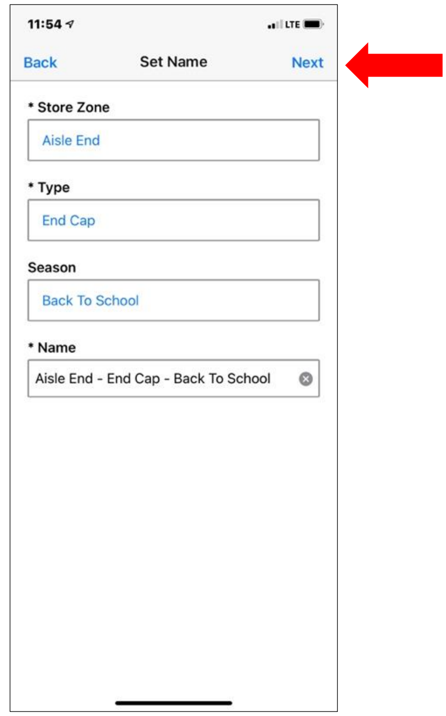




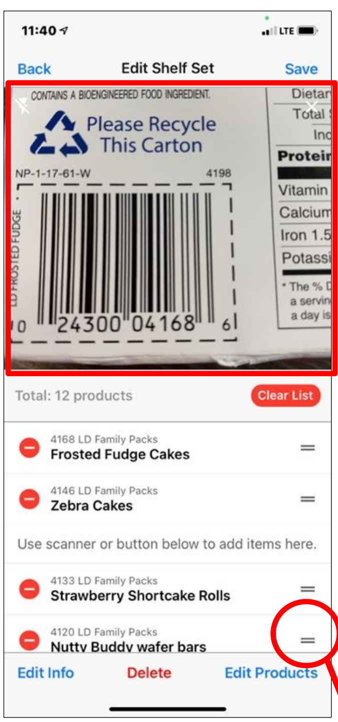
3. Tap “Create Shelf Set”. Enter Store Zone, Type, Season, and Name of shelf set. The tap “Next”.

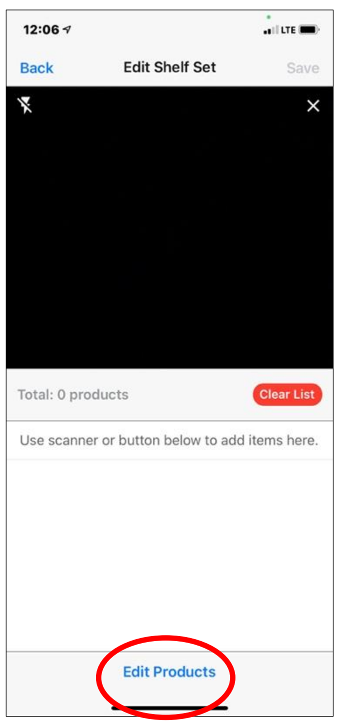


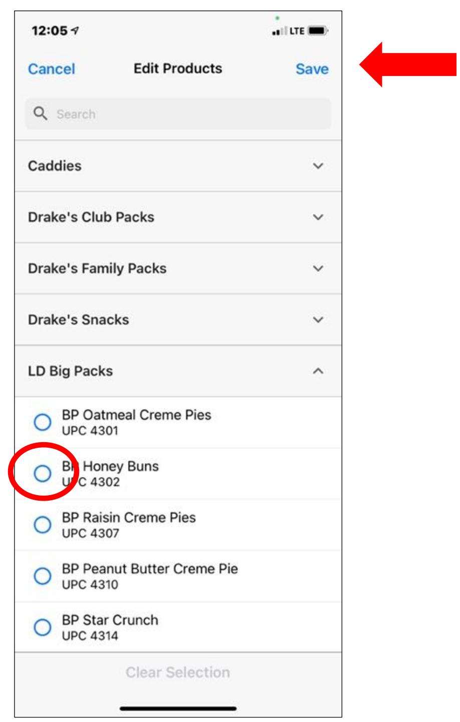




4. Scan the barcode of the products in the order you want. You may tap “Edit Products” to add items not available to scan. To add products to the shelf set tap the circle located to the left of product you wish to add. Tap “Save” when all products have been added.

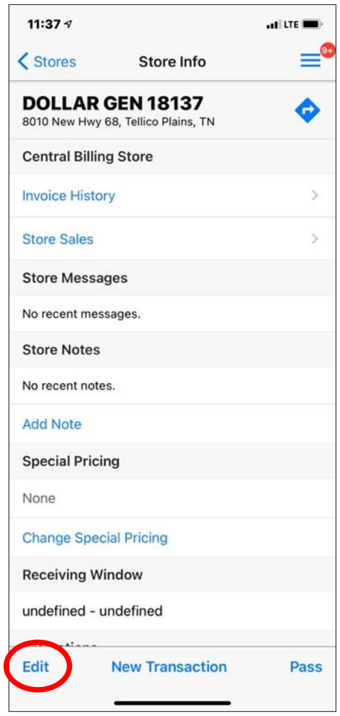


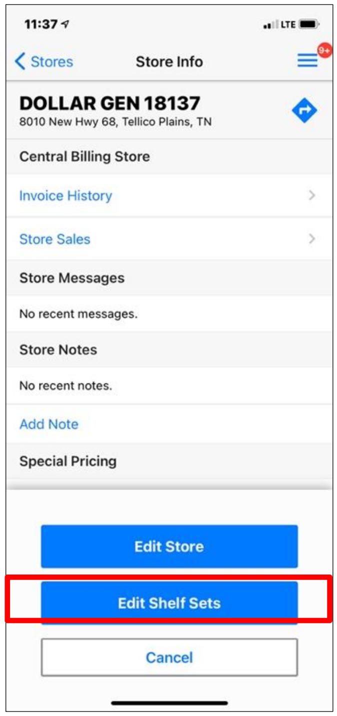


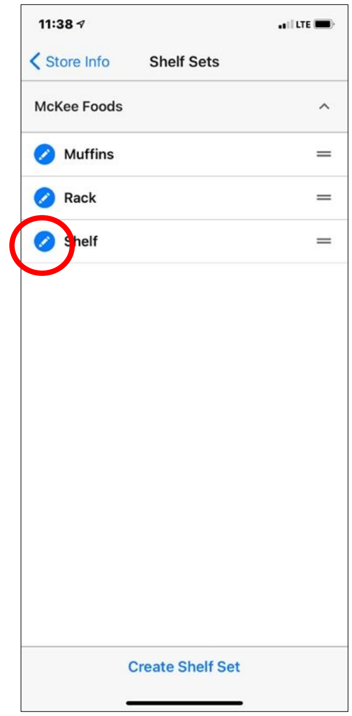


NOTE: *To rearrange products in the shelf set press and drag the two lines located to the right of the product name.*

5. To edit a completed shelf select a store, tap “Edit”, “Edit Shelf Sets” then tap on the blue pencil icon.



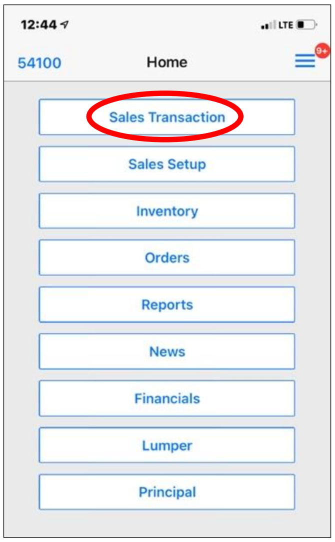


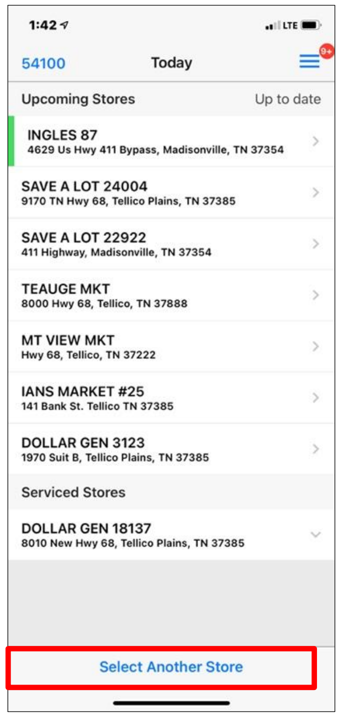


MYBUSINESS - PAIRING THE DEX KEY

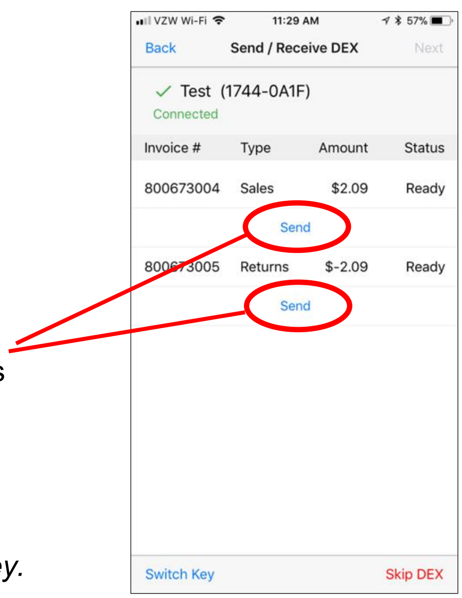
FEATURE SUMMARY: This guide will show you how to pair a DEX key

1. From the Home Screen tap “Sales Transaction”. Then select the store you want to sell to. Tap “Select Another Store” if it’s not in your schedule.





2. Tap “New Transaction”.
3. Tap “Add Sales”.
4. Enter quantities for products and tap “Next”.
5. Review invoice and tap “Next”.
6. Grant permission for the camera if asked.
7. Scan the barcode on Gimme Key.
8. Name the Gimme Key and tap “Next”.
9. Tap “Send” for each invoice type (sales, returns, buy backs and samples).



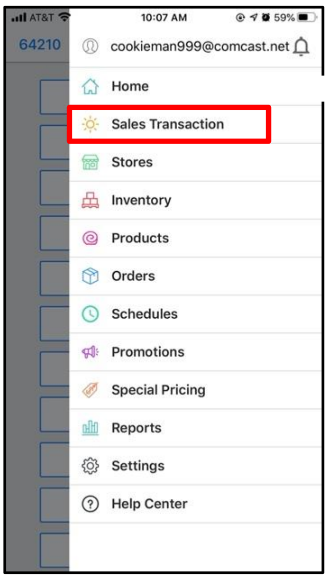
NOTE: *Once the Gimme Key is paired, it will display “Connected” in green below the name of the Gimme Key.*

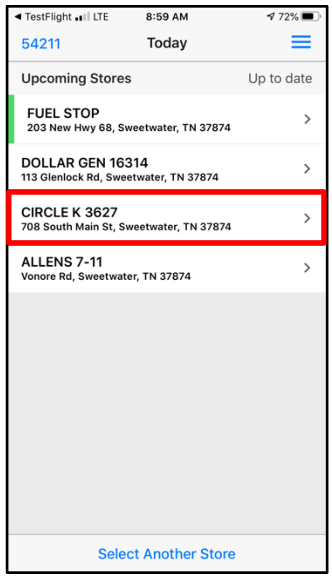
MYBUSINESS - PASSING A STORE

FEATURE SUMMARY:

My Business users will be able to pass on a store that is in the daily queue. Principal Distributors will be able view a report that details any stores that are passed or skipped with a reason in the Reports Menu.

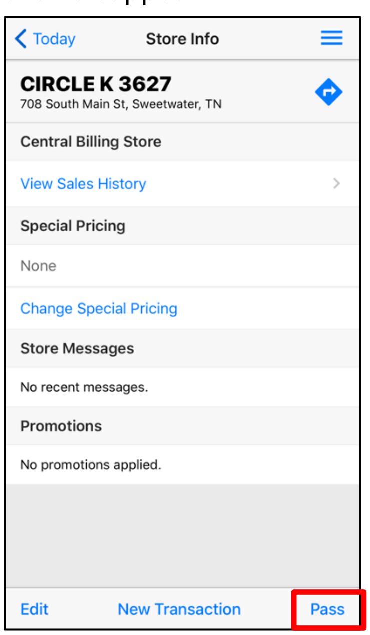
1. From the Menu, tap Sales Transaction to view the stores for the day. Choose the store you wish to skip.

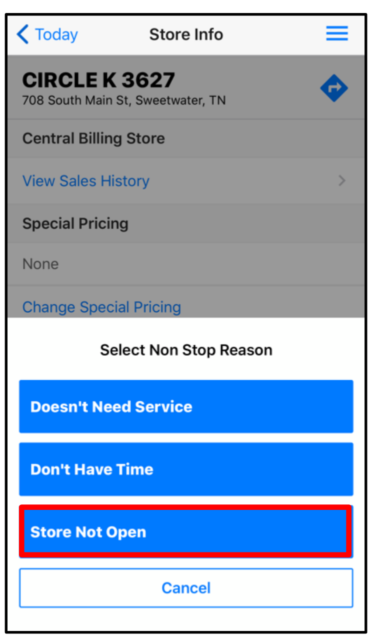




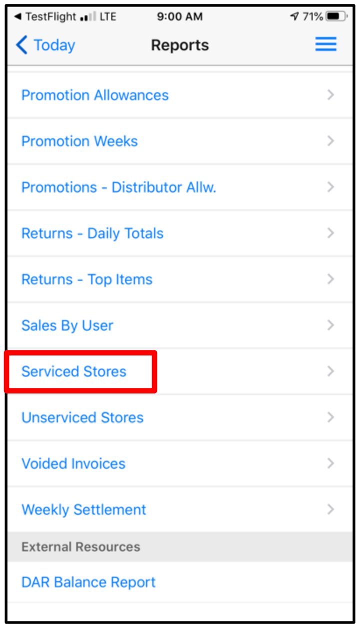
2. At the bottom right corner, you will now see "Pass" instead of "Shelves." (The "Shelves" function has moved to the "Edit" button in the bottom left corner. Here you will be able to edit shelf sets.)

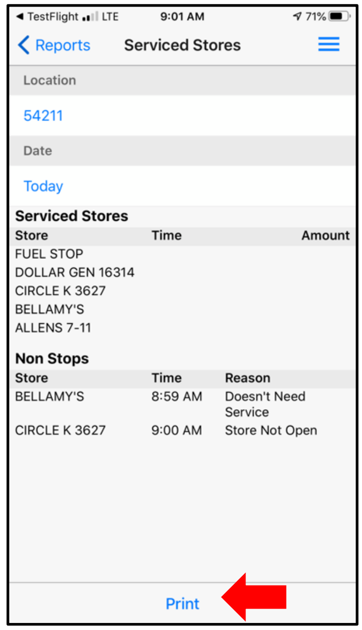
   When you tap "Pass," a pop-up menu will appear. Tap the reason for skipping a store. The store will then disappear.





3. Principal Distributors will be able to view a report that details any stores that were skipped. From the Reports Menu, scroll down to “Serviced Stores.” Tap the location and date you wish to review. You will be able to print the report from this screen as well.



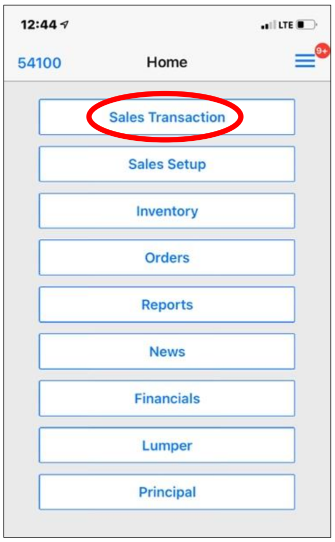


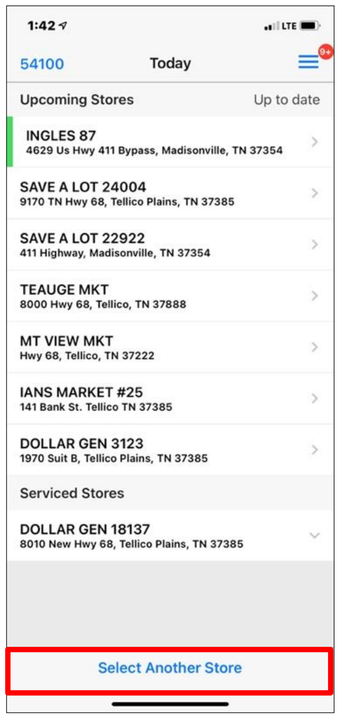
MYBUSINESS – CREATING AN INVOICE

FEATURE SUMMARY:

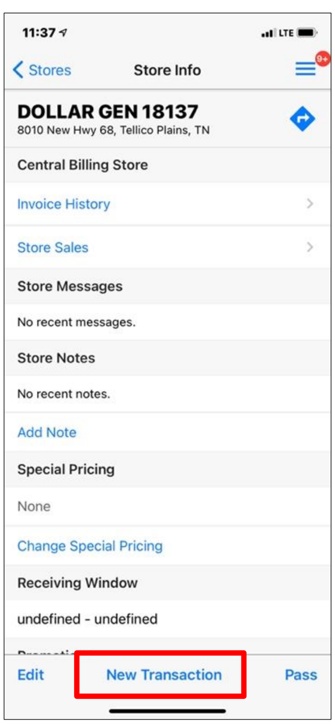
This guide will show you how to sell to a store, how to create an invoice and print the invoice for the sale.

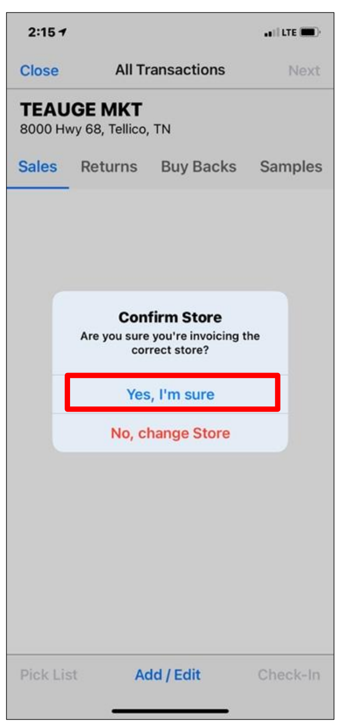
1. From the Home Screen tap “Sales Transaction”. Then select the store you want to sell to. Tap “Select Another Store” if the store is not in your schedule.



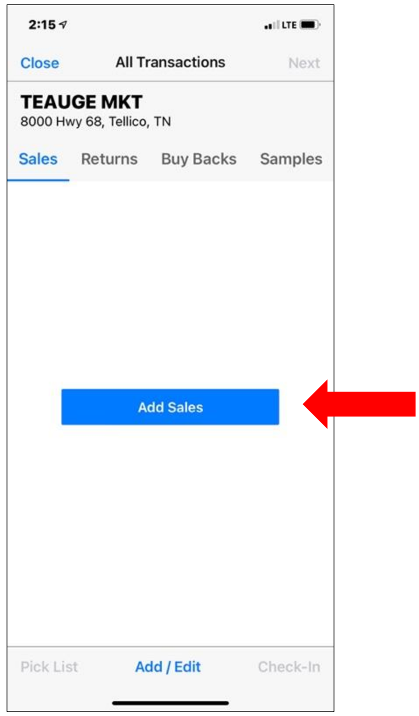


2. Tap “New Transaction”. Then “Confirm Store”.

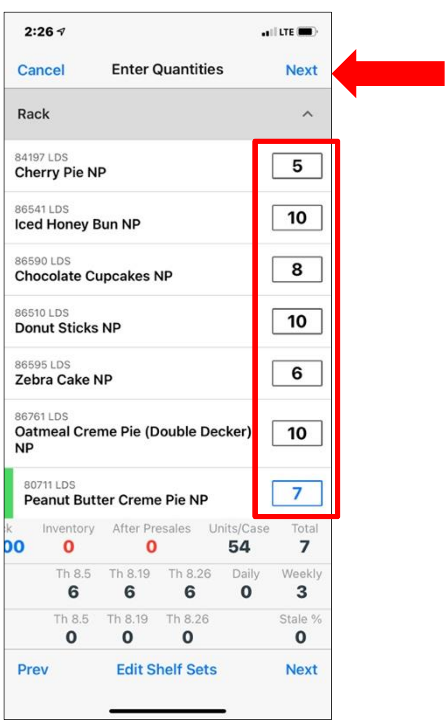




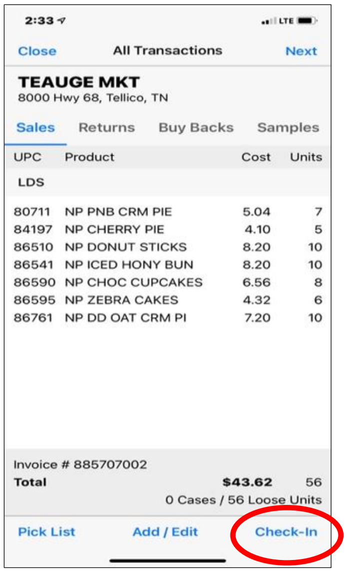
3. Select the invoice type. Then tap “Add Sales”.



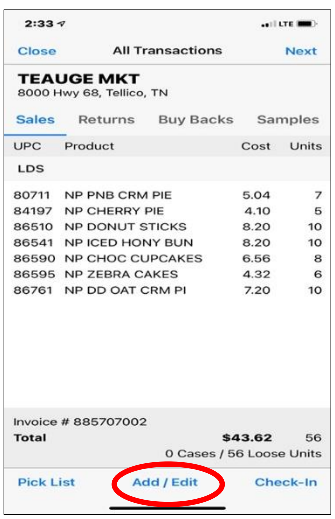
4. Type in the quantity of each item you are selling to the store. Then tap “Next”.



5. Review order and tap “Check-In” to print Check-In slip.

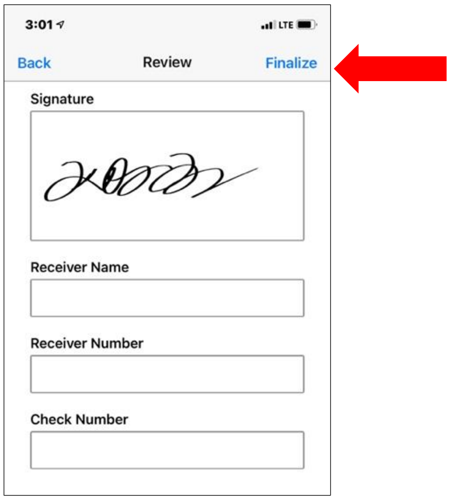


6. To create multiple invoices, select Add/Edit

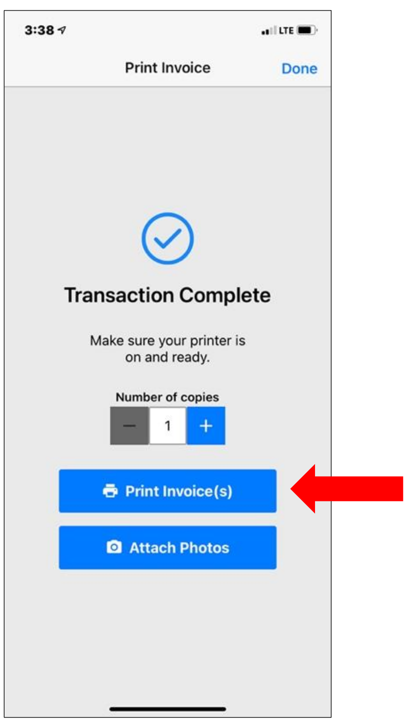


7. Tap “Next” and have the receiver sign the screen. Tap “Done”.

8. Complete the necessary information then tap “Finalize”.



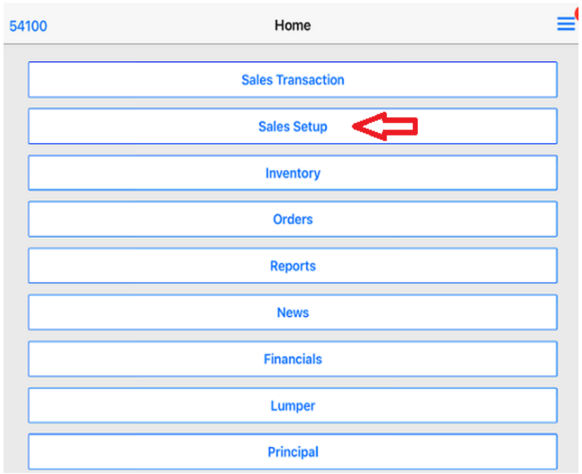
9. Tap “Print Invoice” to print final sales invoice.

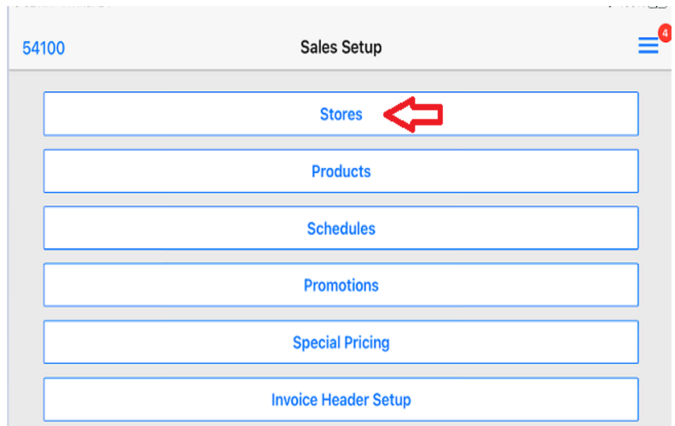


NOTE: *You may also choose to attach photos of the invoice from this screen. See the” Ability To Add Photos To An Invoice” section for more information.*

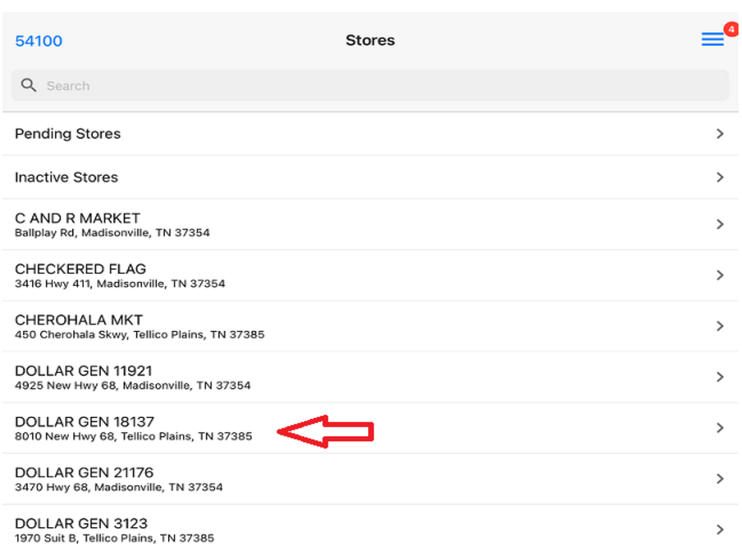
MYBUSINESS – CREATING A MANUAL INVOICE

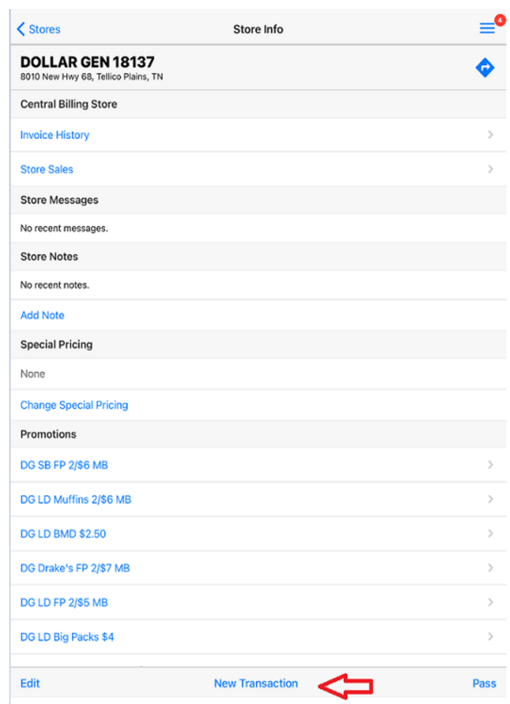
1. From the home screen, select “Sales Setup”, then select “Stores.”



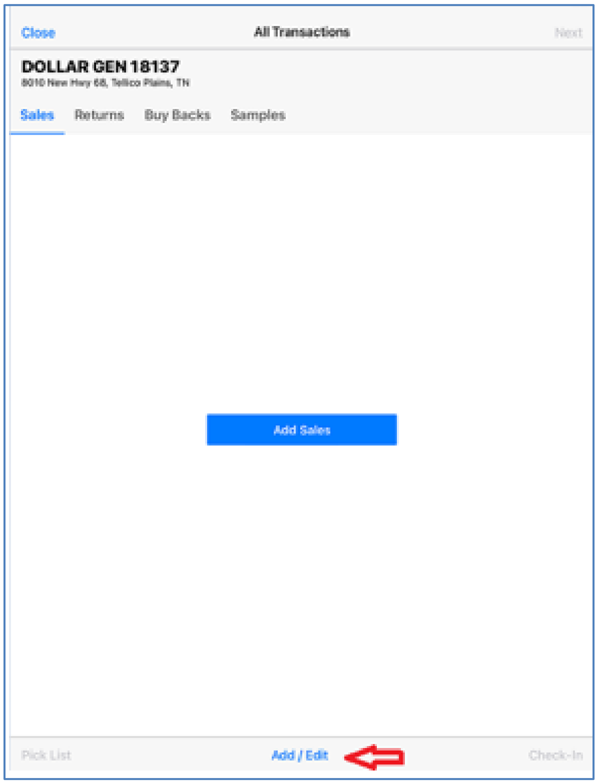


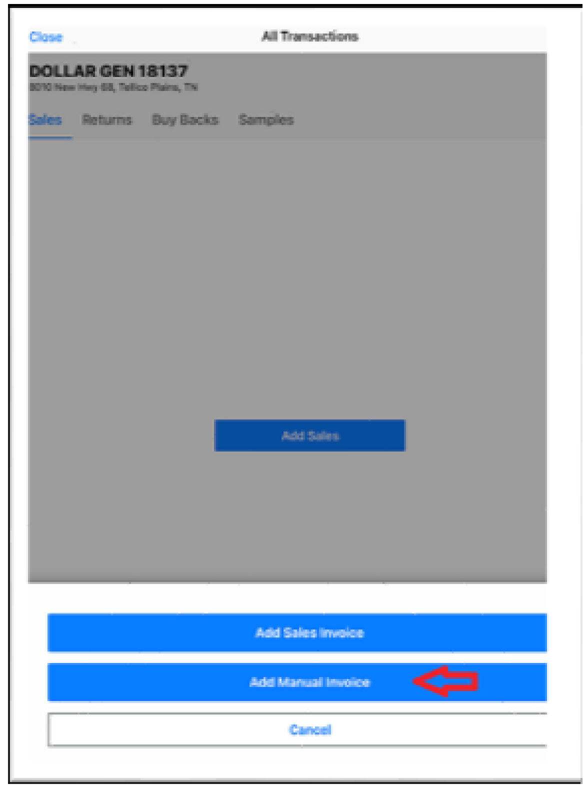
2. Choose the store you want to do a manual invoice in. Then select “New Transaction.”





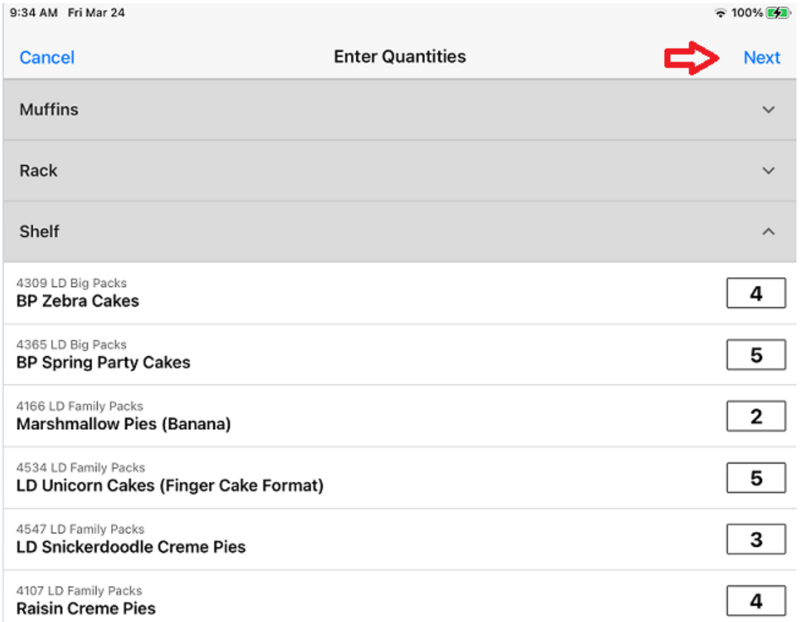
3. Select “Add/Edit”, then select “Add Manual invoice.”



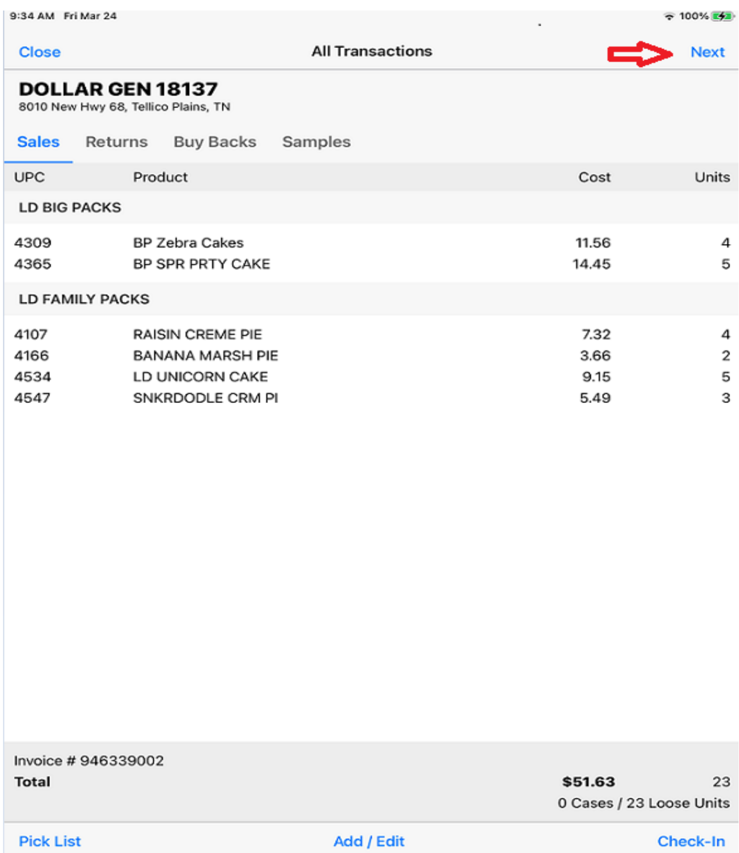


4. Enter “Invoice Number” and “Date” (time isn’t necessary). Then select “Next.”

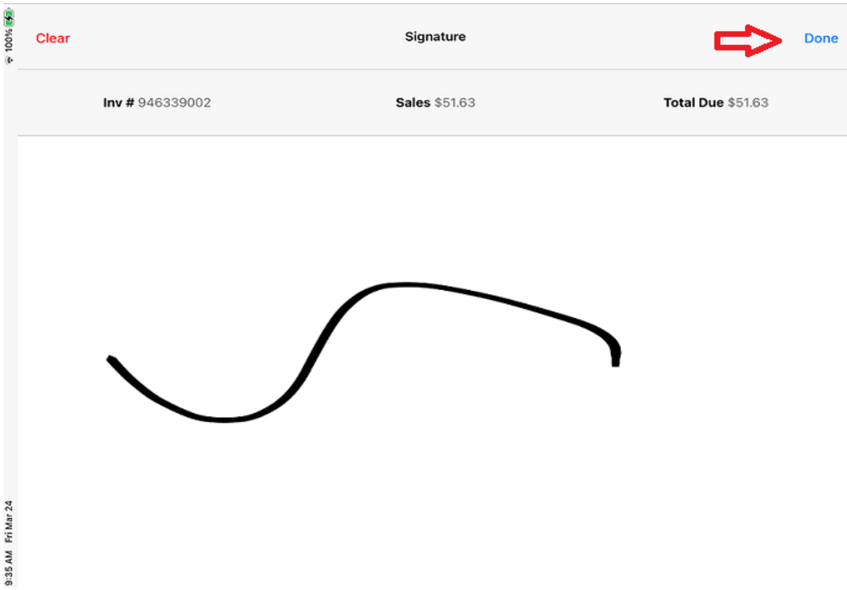
5. Enter "Quantities" and select "Next."



6. Print Check in or select Next

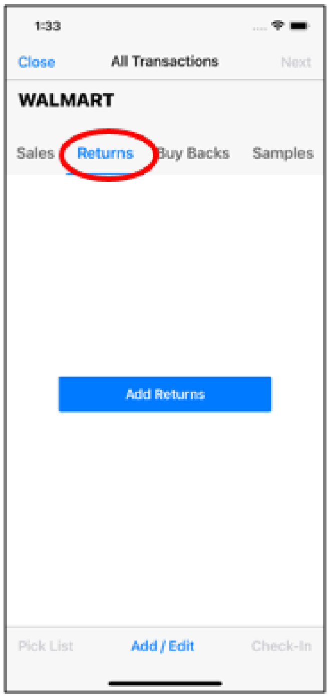


7. Enter Signature and select Done

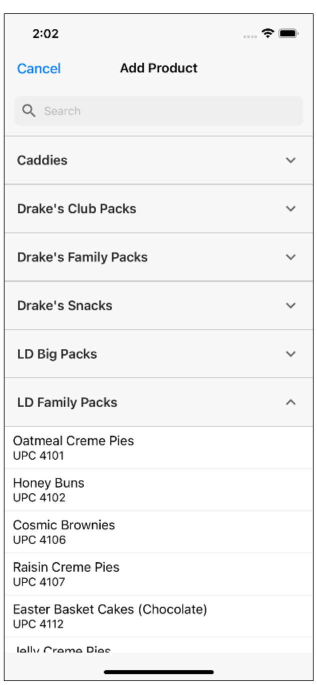


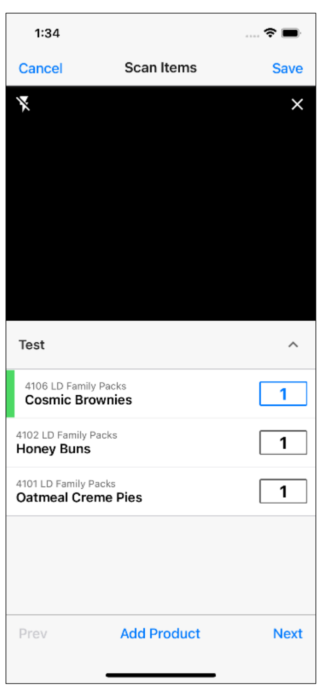
MYBUSINESS – CREATING A RETURN

1. On the “All Transactions” screen, tap ‘Returns” on the header. Tap the “Add Returns” button to begin the Returns invoice process.



2. On the “Add Product” screen, you can scan the product you would like to return, or choose a product from the list. The product quantity screen allows you to select how many units of the products you are returning and groups them by shelf set. Edit the product quantity field with the number of units you are returning. If you have a product on more than one shelf set, you will be asked to select which shelf set the product was located.

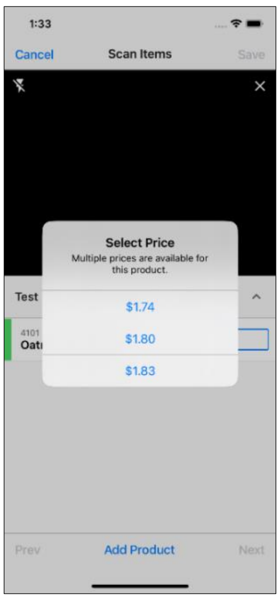




3. If the product you have selected has had a change in suggested wholesale price in the last 3 weeks, you are prompted to choose a price. After 3-weeks the product will automatically return to the then-current suggested wholesale price. If there are discrepancies between the chosen price and what the retailer expects to receive during this 3-week period, in order to best support distributors during this transition McKee Foods will absorb that difference.

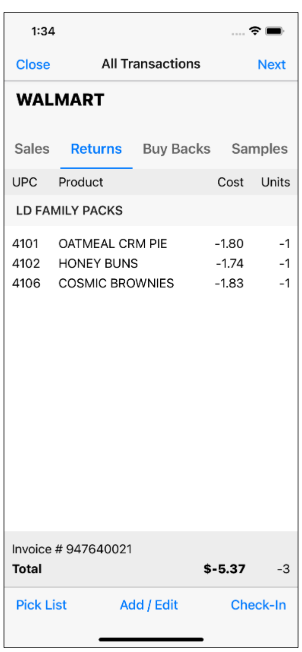
   If special/distributor pricing or promotions are active for the retailer at the time of the distributor's return, there will be no option for the distributor to pick a price and the return will be made at the active special price or promotional price automatically.

   If there is a need to continue to return product at a different price than the suggested wholesale price after the 3-week period has ended, then special pricing will need to be set up by the distributor for that retailer.

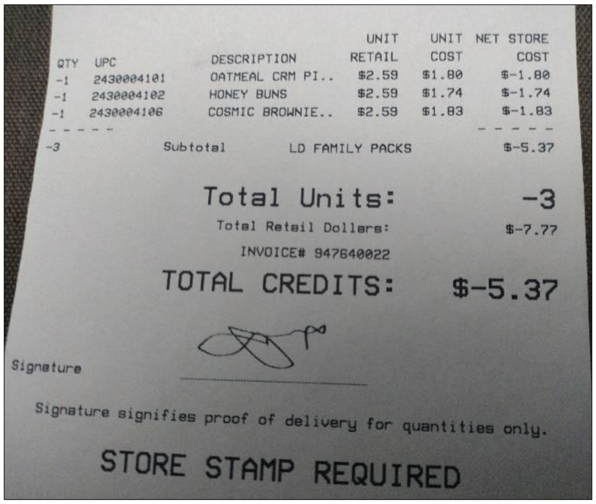


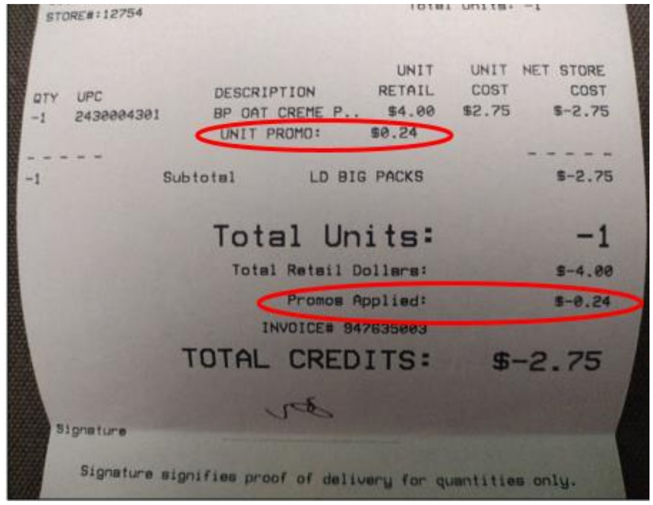
Note: The "Return Prices" data load job can take a bit longer to run for larger distributorships which simply have more history to load.

4. The invoice review screen shows the distributor the details for the invoice. Note the 3 products showing the 3 different price points selected for each one.



5. Here is the printed invoice for this sample return. As the promotion prices for the 2 products were related to RHQ promotions, there is nothing on the printed invoice that shows anything about promotion allowance. The 3 prices are shown exactly as they were selected.





6. **Here is a printed invoice for a return where the selected product price reflects a distributor setup promotion. As such, the unit promotion allowance is noted right below the product description and in the totals section. You can now see a line that details the total promotions allowances applied to the invoice.**

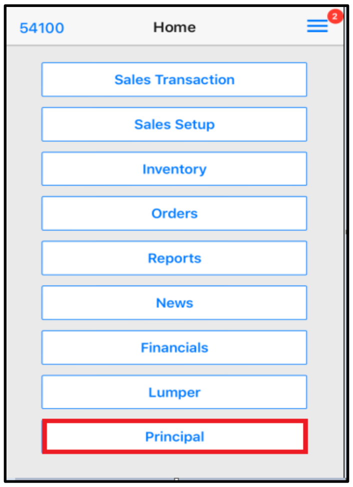
*__NOTE: To ensure that the unit cost on the invoice is correct, the promotion price point of the product must be specifically selected on the “Select Price” screen when the product is added to the return.__

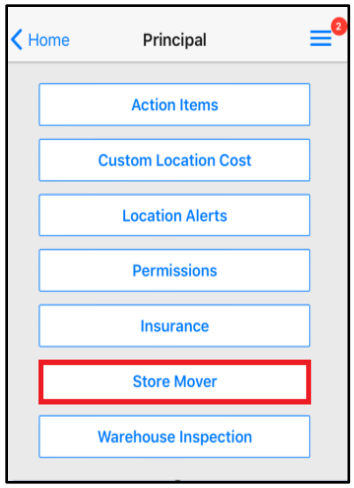
MYBUSINESS – STORE MOVER (FOR PRINCIPAL WD'S ONLY)

Feature Summary:

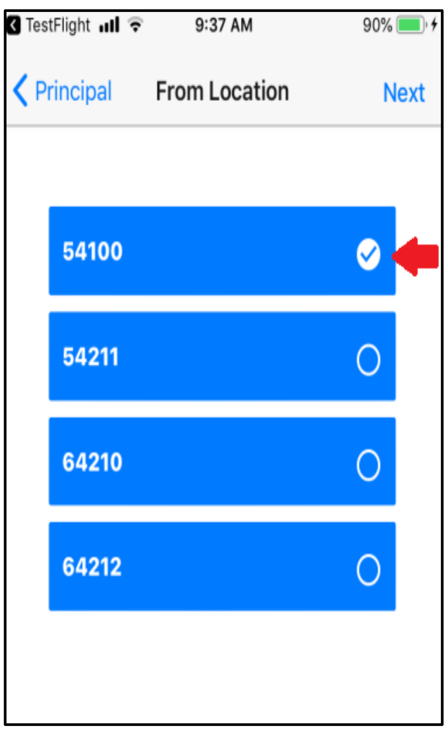
This Guide will show you how to move a store from one location to another within the same AR#.

1. From the home screen, tap Principal then select Store Mover.

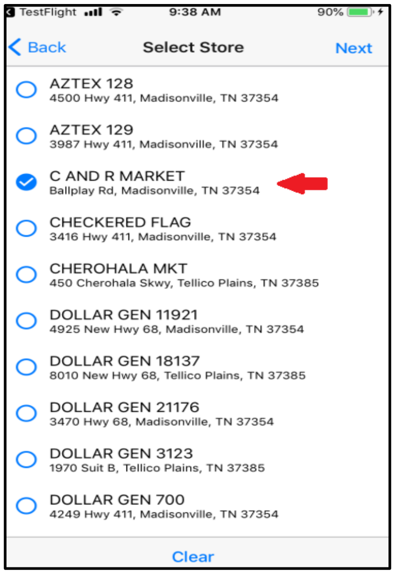




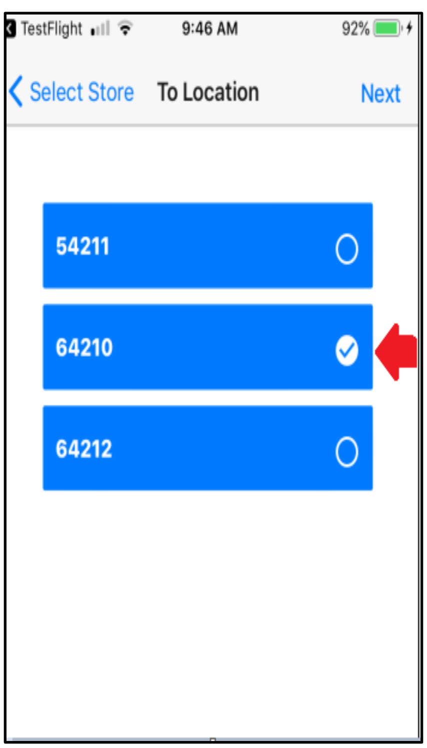
2. Select the location the store is moving from

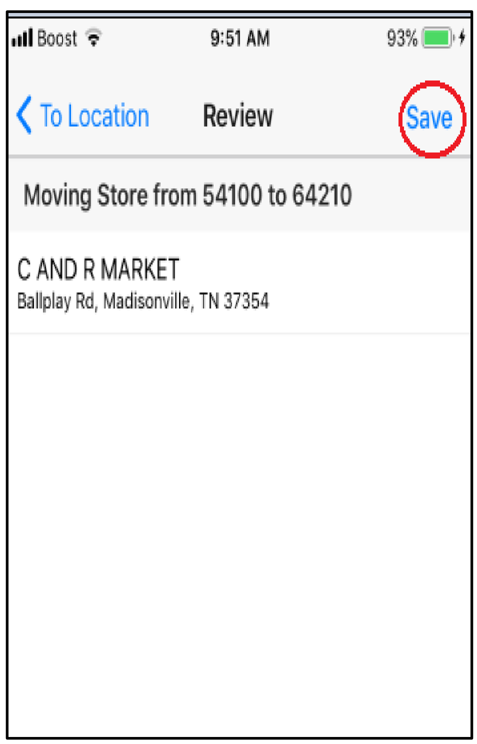


3. Select the store, and then tap next.



4. Select the location the store is moving to, and tap next. Then tap Save on the "Review" screen.



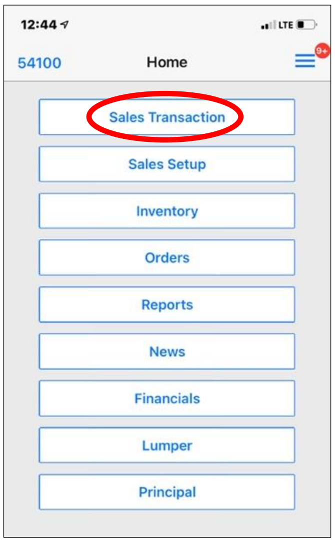


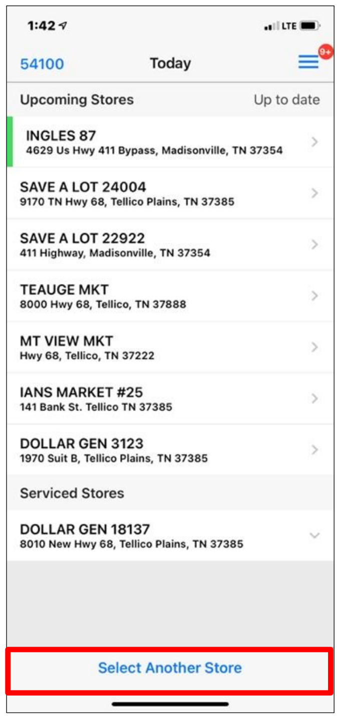
MYBUSINESS – ADDING MULTIPLE TRANSACTIONS

FEATURE SUMMARY:

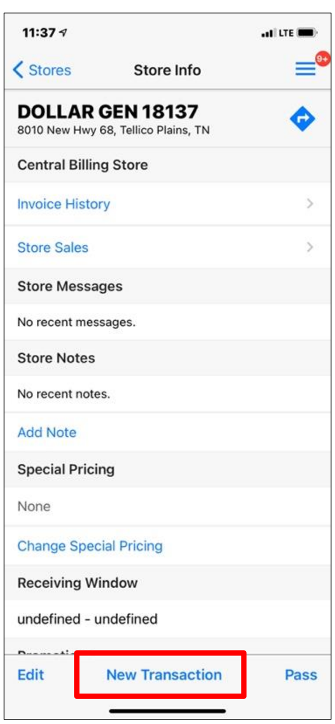
This guide will show you how to add an additional transaction when selling to a store.

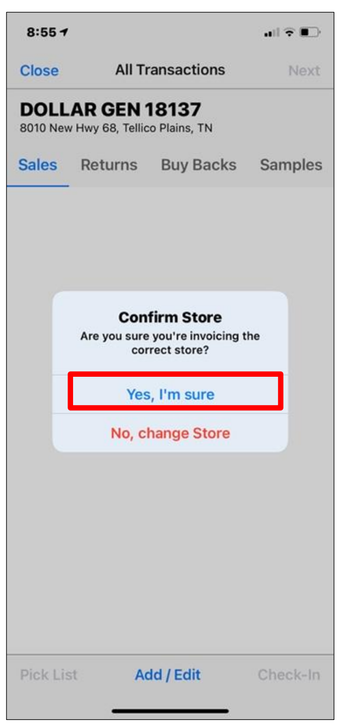
1. From the Home Screen tap “Sales Transaction”. Then select the store you want to sell to. Tap “Select Another Store” if the store is not in your schedule.



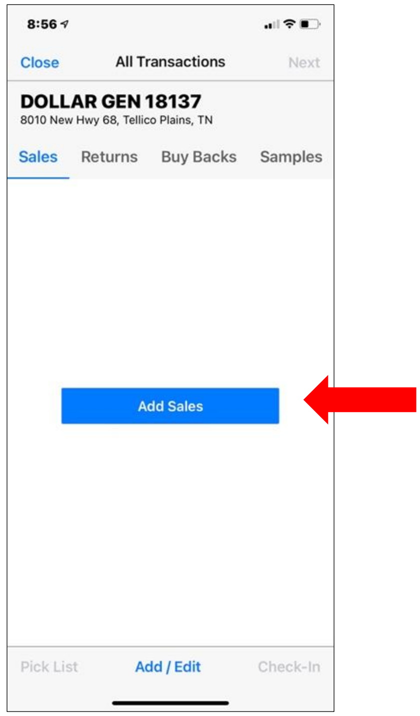


2. Tap “New Transaction”. Then “Confirm Store”.

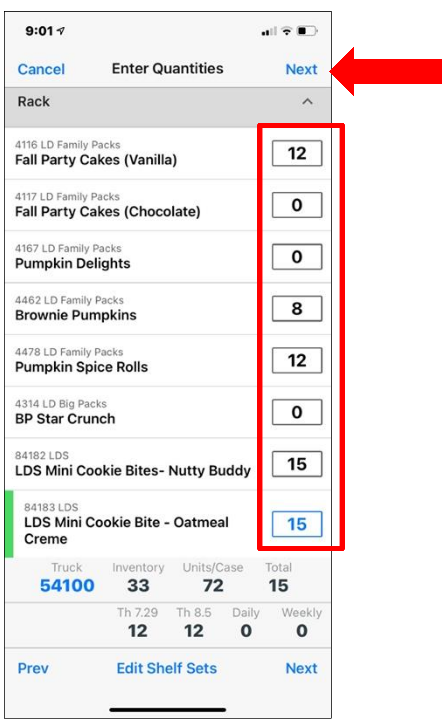




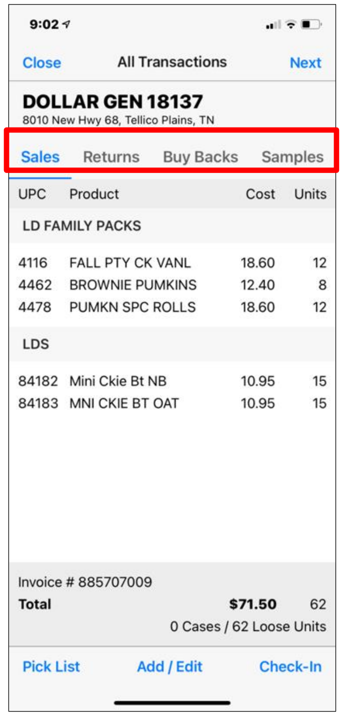
3. Select the invoice type. Then tap “Add Sales”.



4. Type in the quantity of each item you are selling to the store. Then tap “Next”.



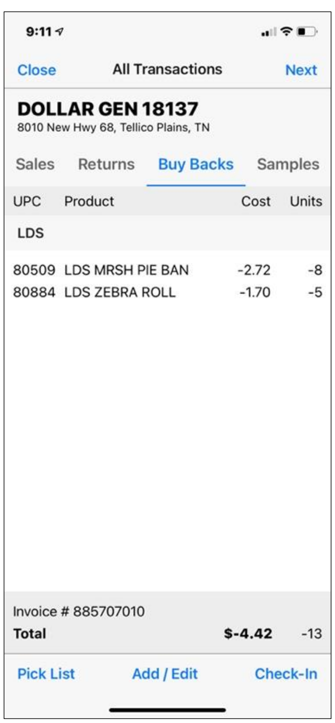
5. Review order. To add an additional transaction tap “Sales, Returns, or Buy Backs” in the header.



NOTE: *You may add as many Sales, Returns, or Buy Backs as needed in a single invoice.*

6. Each Sale, Return or Buy Back will be shown in the Transaction Header, numbered by order entered.

***Important: When using Dex, you can only have 1 transaction type per invoice. This means that you need to tap “Send” for each invoice type (Sales, Returns, Buy Backs and Samples).**

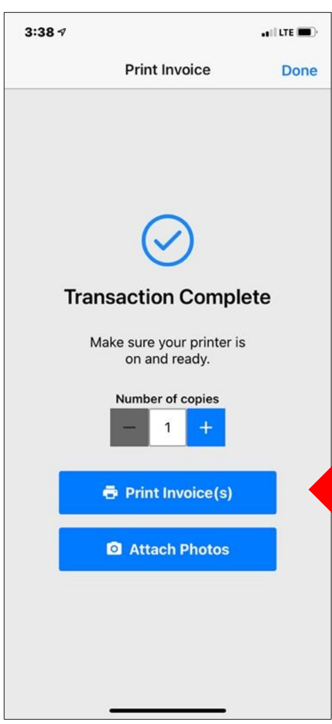


NOTE: *When you are in an order and tap “Close”, you are cancelling the whole order. To make changes to an order, adjust the product quantities and tap “Save”.*

7. Tap “Next” and have the receiver sign the screen. Tap “Done”.

8. Completed needed information then tap “Finalize”.

9. Tap “Print Invoice” to print final sales invoice.

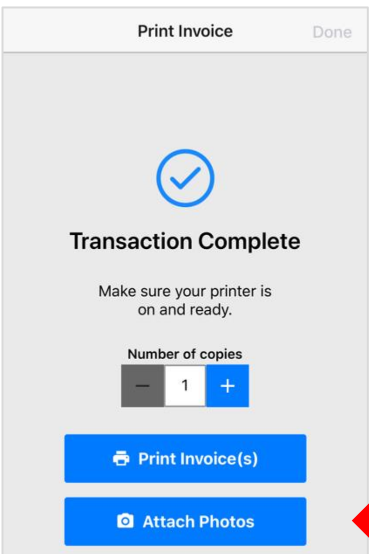


NOTE: *You may also choose to attach photos of the invoice from this screen. See the” Ability To Add Photos To An Invoice” section for more information.*

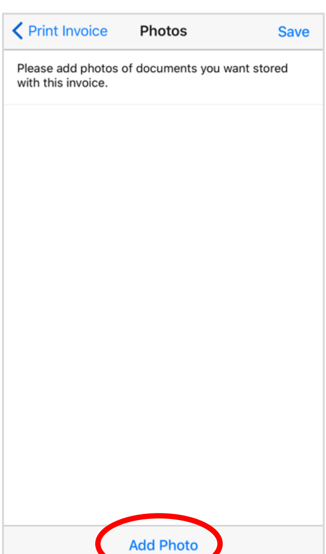
MYBUSINESS - ABILITY TO ADD OR REVIEW PHOTOS IN AN INVOICE

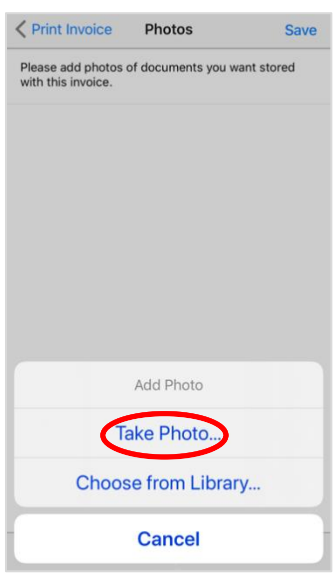
FEATURE SUMMARY:
MyBusiness users will now be able add photos to an invoice. This feature is will allow you to add photos to an invoice either during the transaction or in the sales history. This process is designed to help DAR obtain copies of invoices that have a store stamp if a discrepancy is discovered.

1. When you have finalized an invoice and are ready to print, you will notice a new button called “Attach Photos.” If you wish to add the store stamped copy of the invoice during the transaction process, tap “Print Invoice.” Then ask the store associate to stamp and sign that copy. When you are still on this screen, you can add a picture of the signed invoice before selecting “Done.” To add a photo, tap “Attach Photos.”



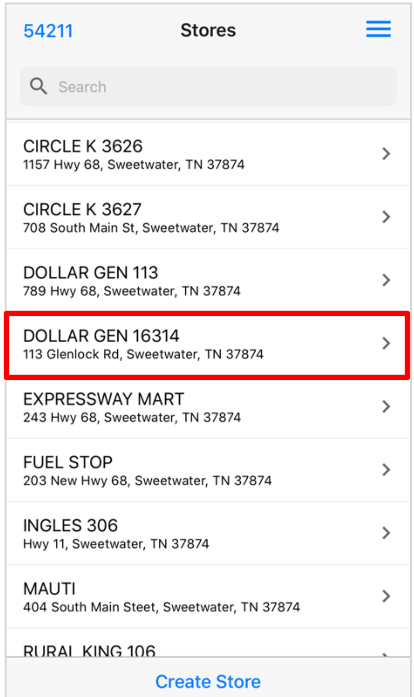
2. Tap “Add Photo” at the bottom. Tap “Take Photo.” Take a photo of the signed invoice. Tap “Save” and then “Done” to finalize your invoice.

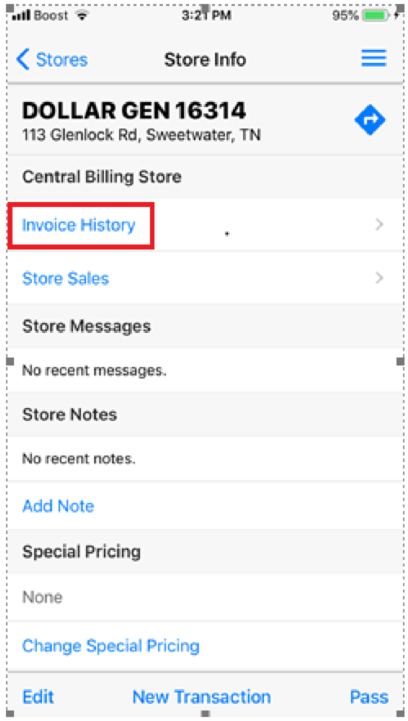


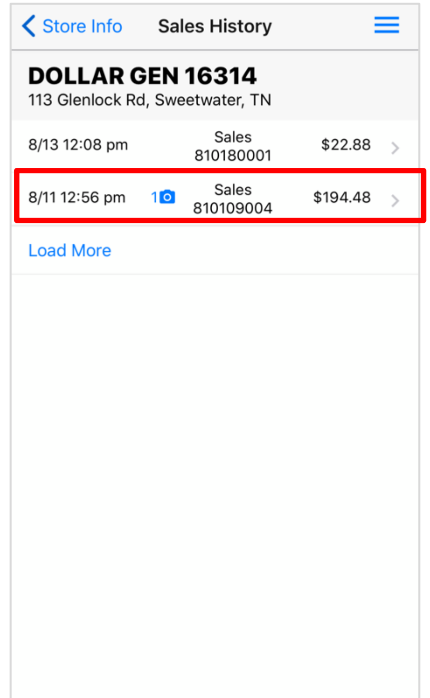


TO REVIEW PHOTOS ADDED TO AN INVOICE OR ADD A PHOTO TO AN INVOICE > SALES HISTORY

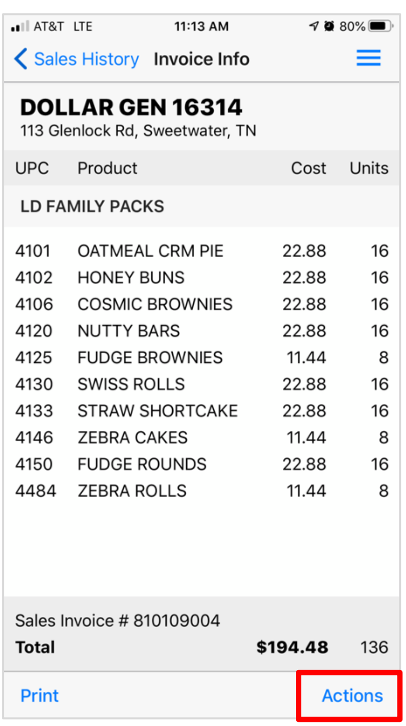
3. Find the store in the store menu. Tap “Invoice History.” Tap the invoice you want to add a photo to or the invoice you would like to view.

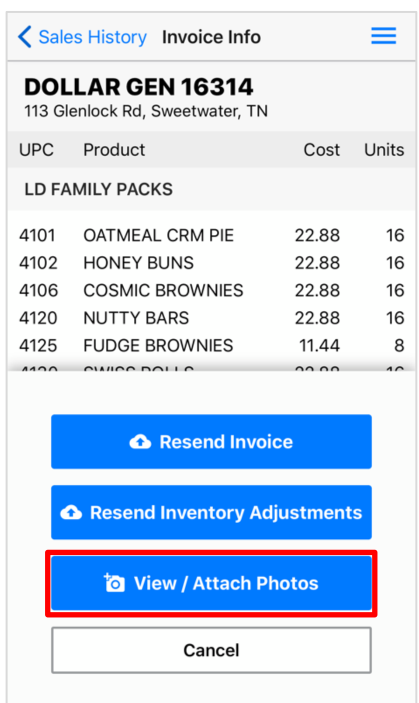






Tap “Actions.” Tap “View/Attach Photos.” You can tap “Add Photo” to take a picture of a store stamped copy of an invoice.

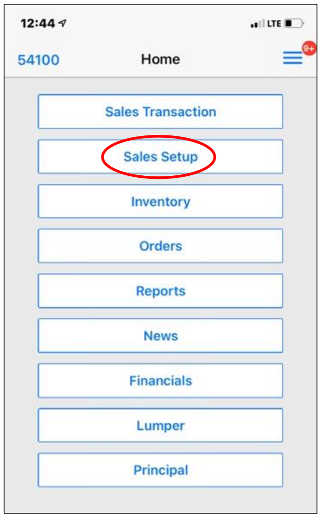


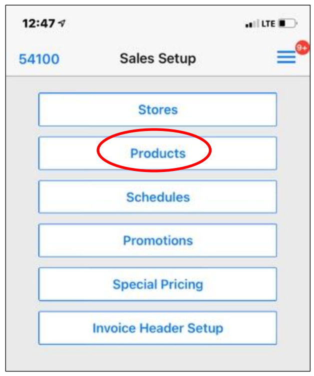


MYBUSINESS – NON-MCKEE PRODUCTS

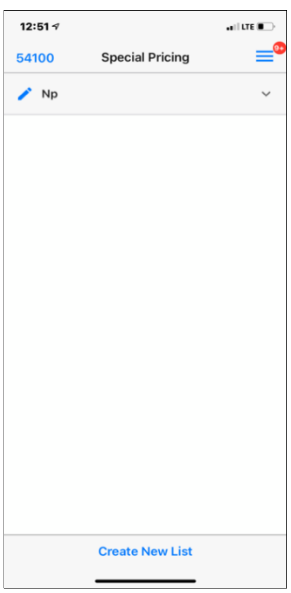
FEATURE SUMMARY:
This guide will show you how create a catalog & invoice for non-McKee products. The invoice feature is only available for cash stores.

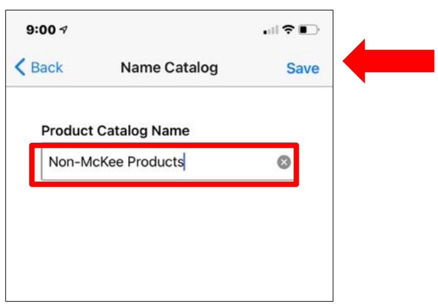
1. Tap “Sales Setup” on the Home Screen, then tap “Products”.



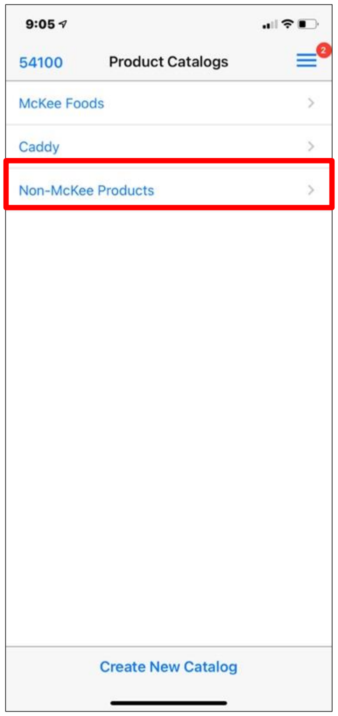


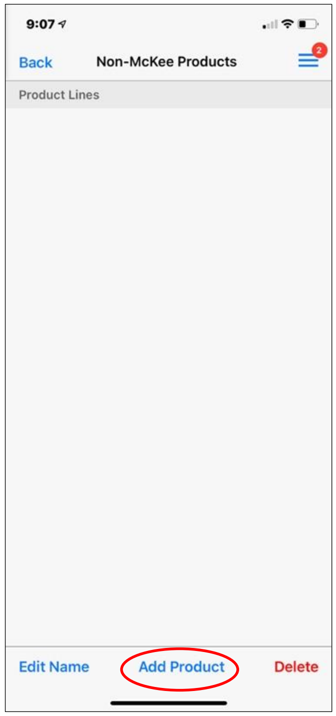
2. Tap “Create New List”, then “Name” your list and tap “Save”.



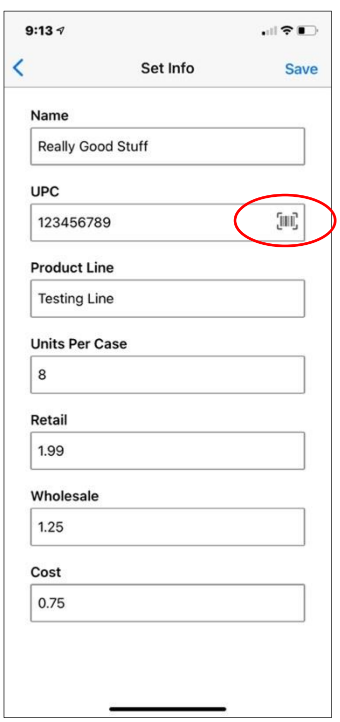


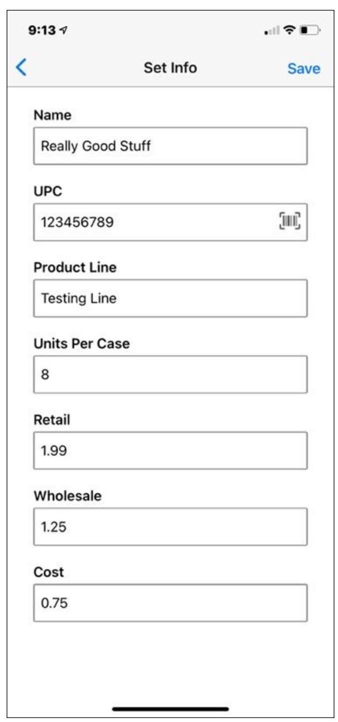
3. Tap the desired product catalog, “Add Products”, completed the needed information then, tap “Save”.





4. Tap on the Bar Code icon under UPC and scan the non-McKee bar code. Then enter the product information Then tap “Save”. Repeat process for all products in the catalog.





5. TO INVOICE A CASH STORE FOR NON-MCKEE PRODUCTS

Tap Sales set up on the home screen. Select Stores, and then choose the cash store you want.

Select Edit, and Edit Shelf Sets.

Choose Create Shelf Set.

Select the Non-Mckee Items and tap next.

Fill out the Set Name screen and select next.

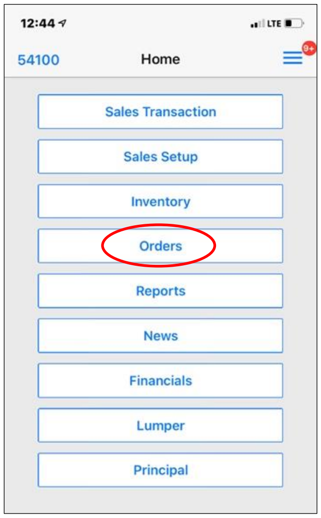
You can scan the barcode or select edit products to add the Non-McKee item to your shelf set and tap save.

Exit out to home page and you are ready to invoice Non-McKee items.

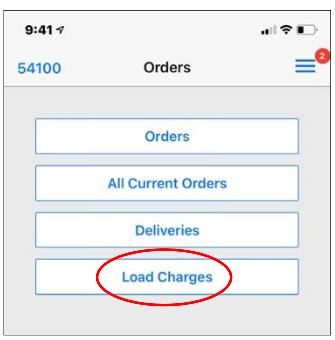
MYBUSINESS – RECEIVING A LOAD

FEATURE SUMMARY:
This guide will show you how to receive a load. You can then apply the load to the desired inventory location (truck, warehouse or both depending on your preference.

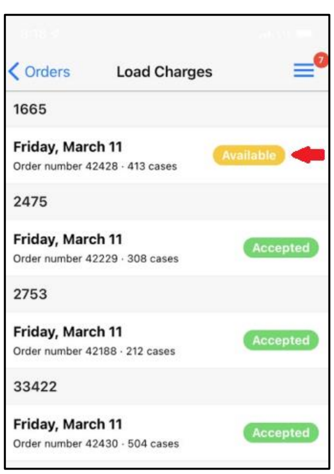
1. When your order arrives tap “Orders” on the Home Screen.



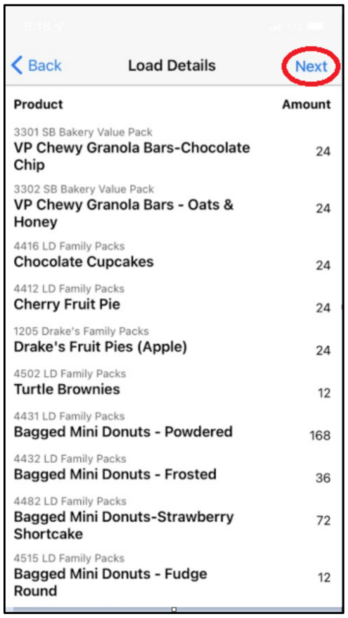
2. Tap “Load Charges”.



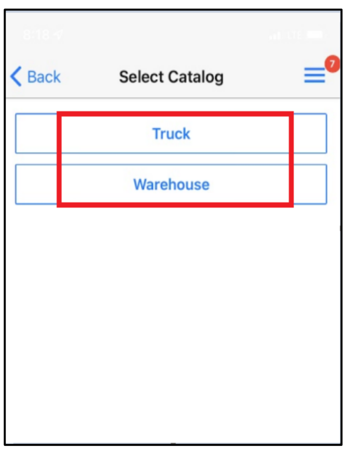
3. Select the available load charge.



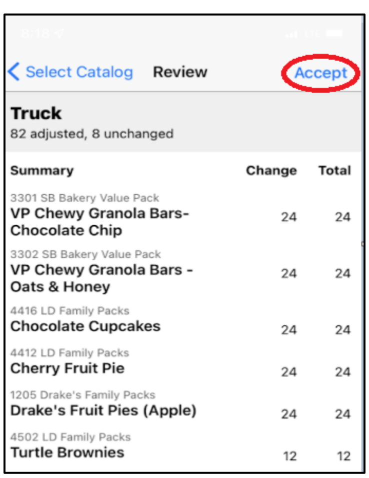
4. Review the load Details screen and tap “Next.”



5. Select the catalog to apply the load in. *(Note, this step will not be available if the location has only one catalog set up.)*



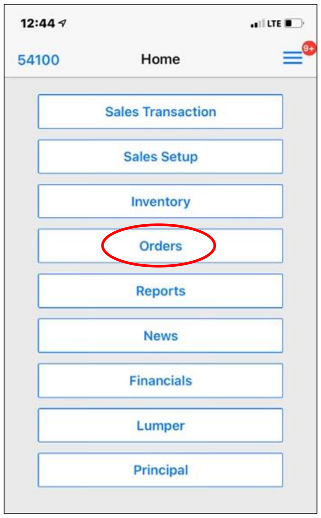
6. Select “Accept.” The inventory will then be applied to the catalog selected in step 5.



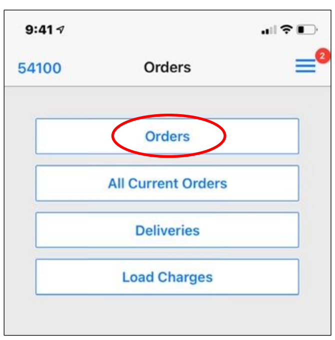
MYBUSINESS – WEEKLY ORDERING

FEATURE SUMMARY:
This guide will show you how to place your weekly order. As you tap on each product, you can see your on-hand inventory as well as order history. Order history will build as you place orders in the app.

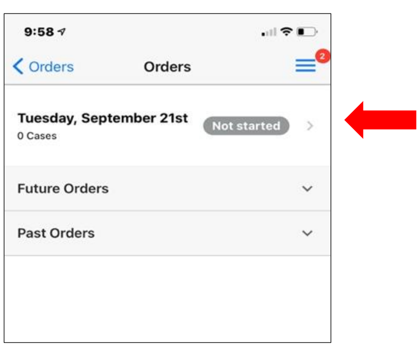
1. When your order arrives tap “Orders” on the Home Screen.



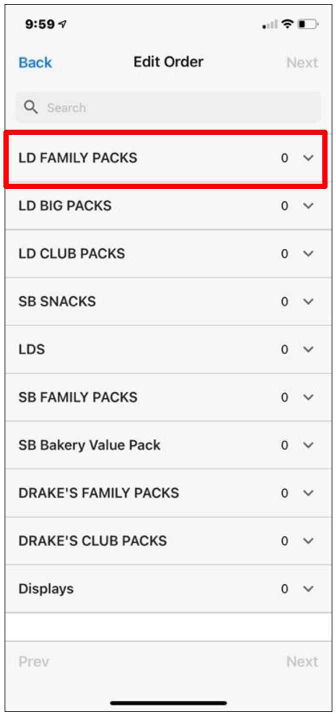
2. Tap “Orders” again.



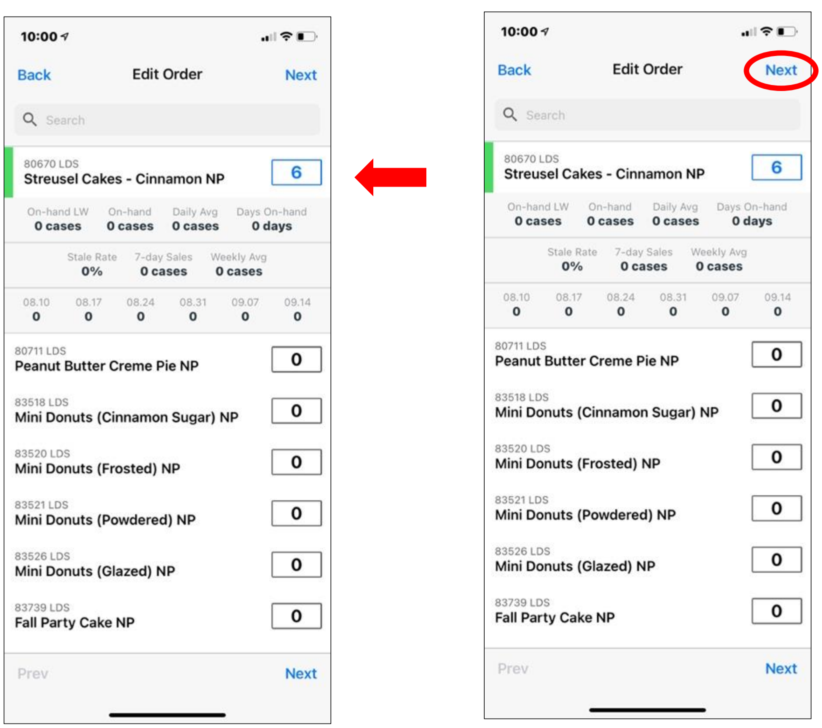
3. Locate and tap on the week you would like to order for.



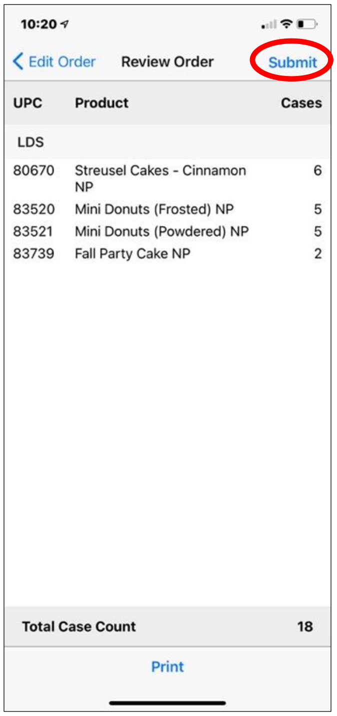
4. Tap on the product line you want to select products from.



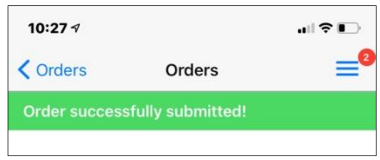
5. Tap on the desired product. Then enter a quantity for each product or display you want to order. From here, you can also see detailed inventory counts and sales history on the product. When all product quantities are entered tap “Next”.



5. Review your order summary and tap “Submit”.



NOTE: *After submitting your order look for this message:*



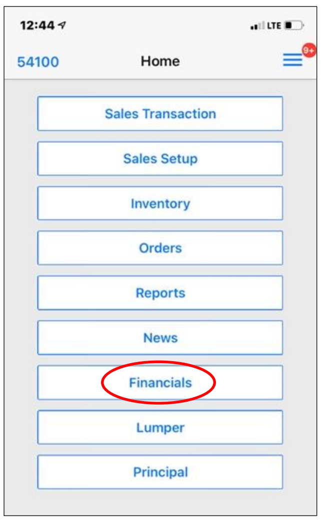
No Message? The Order did not send.

MYBUSINESS – ENDING THE WEEK

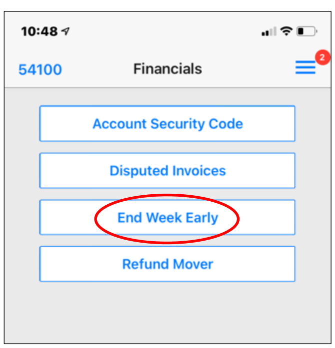
FEATURE SUMMARY:
This guide will show you how to end your week early. If you do not tap the “End Week Early” button, your week will end at midnight on your zero out day automatically. In order to use the end of week feature, you will need to be connected with either WIFI or cellular service.

Remember: Once you end your week, there is no un-do function, so be sure you are ready before ending your week.

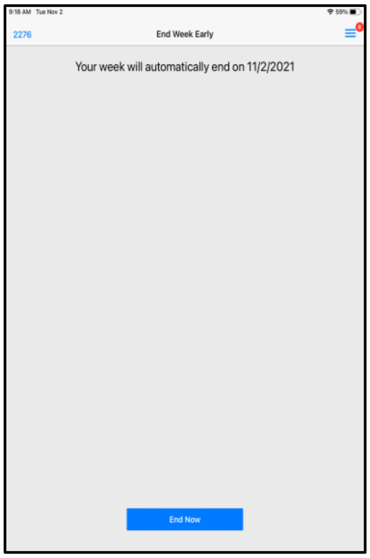
1. From the home screen tap on “Financials”.



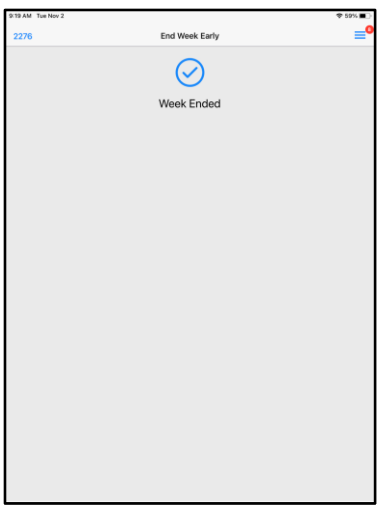
2. Tap “End Week Early”.



3. Tap “End Now”. Then tap “End Week” when prompted.



4. When you see “Week Ended”, you are done.

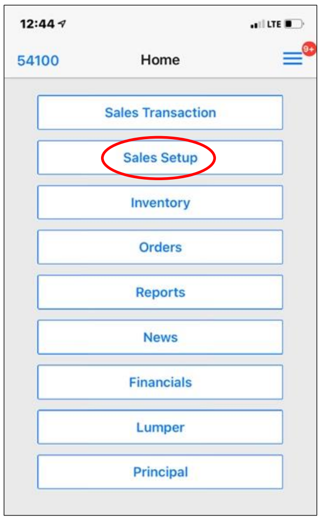


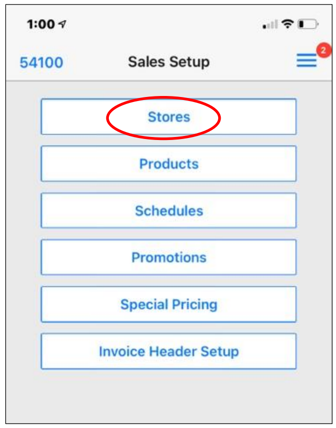
MYBUSINESS – NEW STORE SUBMISSION

FEATURE SUMMARY:

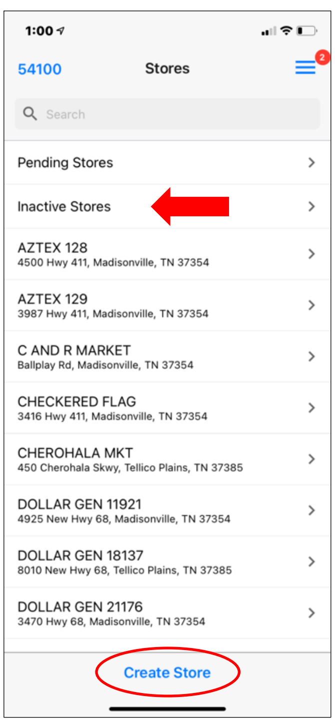
This guide will show you how to submit a new store or reactivate an inactive store. New stores will be listed as “Pending” for approximately seven days.

1. From the home screen tap on “Sales Setup”. Then tap “Stores”.



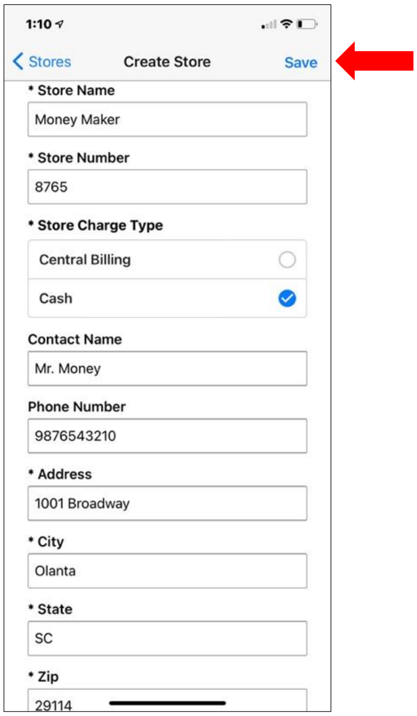


2. Select “Inactive Stores” to reactivate them or tap “Create Store” to add a new store.



3. Complete store information, including whether it is a Central Billing or Cash store, then tap “Save”.

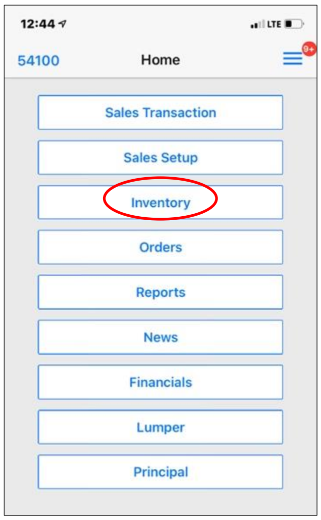
When you tap “Save” the store will then appear in your pending stores list. Once the store is reviewed by McKee foods (within one business day) it will be added to your active store list.

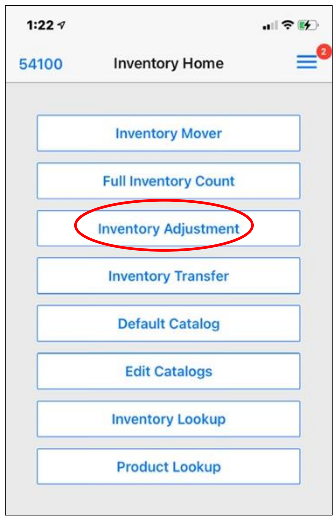


MYBUSINESS – INVENTORY ADJUSTMENTS

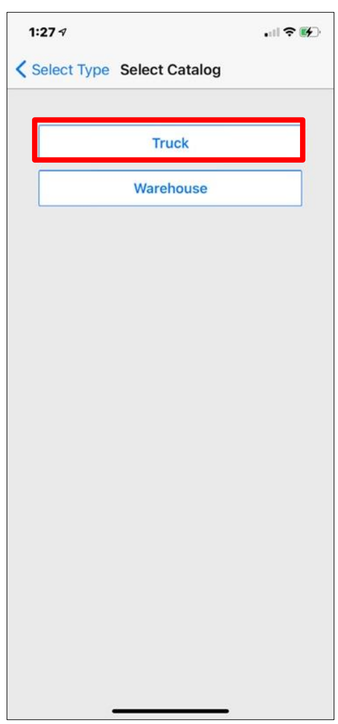
FEATURE SUMMARY:
This guide will show you how to make inventory adjustments. For your starting inventory to be accurate, adjust your inventory the day before your load arrives.

1. From the home screen tap on "Inventory". Then tap "Inventory Adjustment".

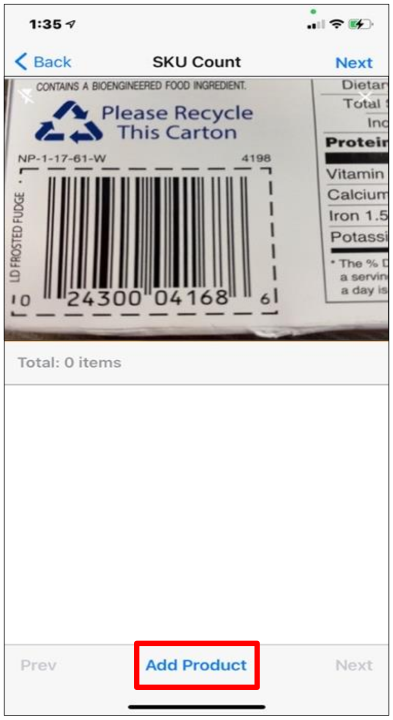




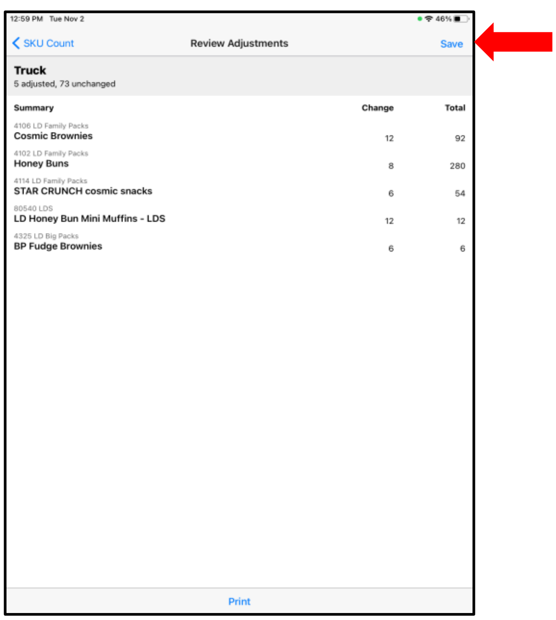
2. Select "Set, Add or Subtract Inventory". Then tap either "Truck" or "Warehouse".



3. Grant permission for the camera if asked. Then scan products and enter the count of products on hand or tap “Add Products” and select items. Tap “Next”.



3. Review inventory, then tap “Save”.

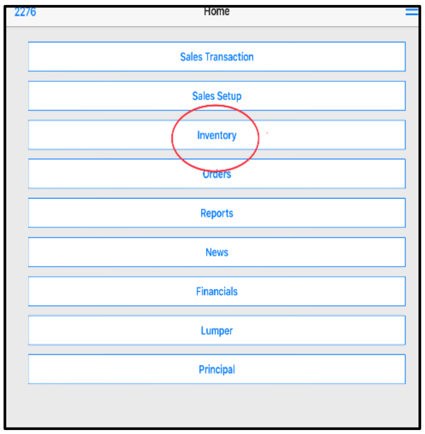


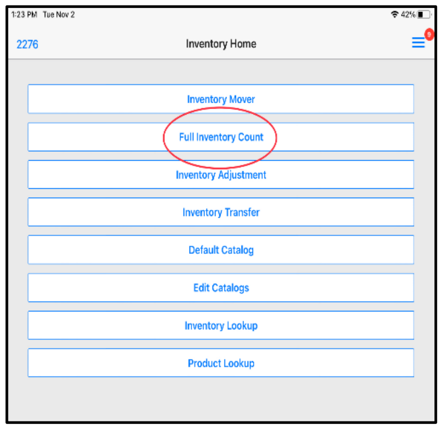
MYBUSINESS – FULL INVENTORY COUNT

FEATURE SUMMARY:

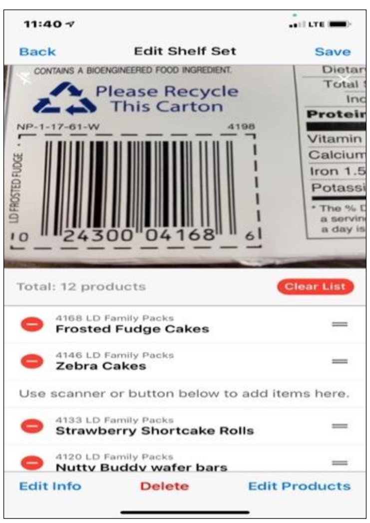
This guide will show you how to make a full inventory count using the app. Be sure to do a physical count of the inventory showing in the app using a marker or stickers to mark cases counted. Then add the extra cases to your inventory in the app that were not accounted for.

1. From the home screen tap on “Inventory”. Then tap “Full Inventory Count”.



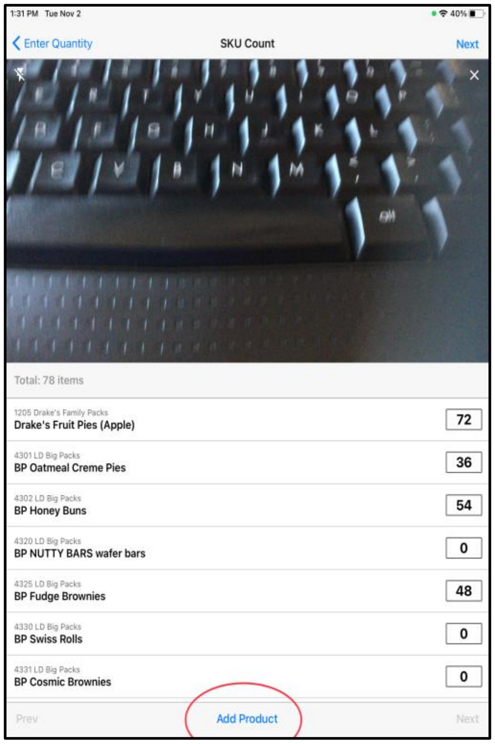


2. Select the catalog you are counting, “Truck” or “Warehouse”.

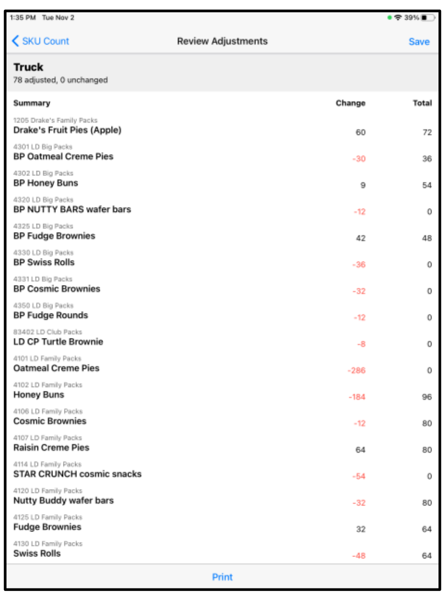


3. Enter cases and extra unit quantities and tap “Next”.

4. Scan barcodes or tap “Add Products” to add additional UPCs.



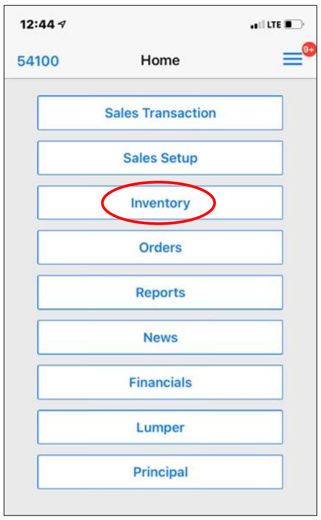
5. Review inventory summary adjustments and tap “Save”.

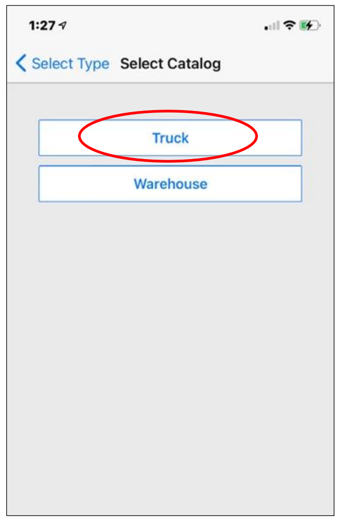


MYBUSINESS – INVENTORY MOVER

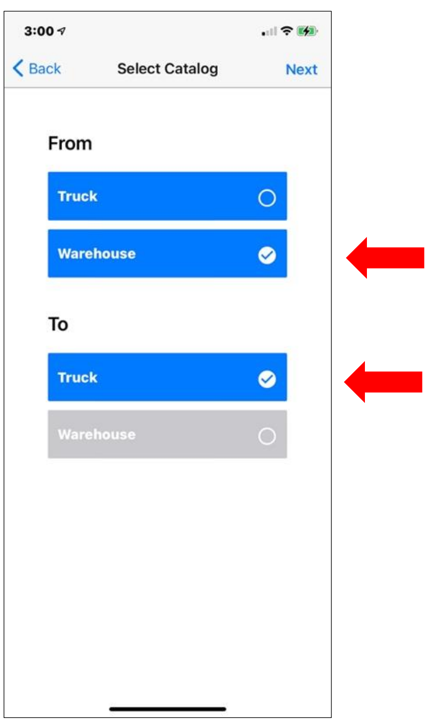
FEATURE SUMMARY:
This guide will show you how to move inventory between your truck and your warehouse.

1. From the home screen tap on “Inventory”. Then tap “Full Inventory Mover”.

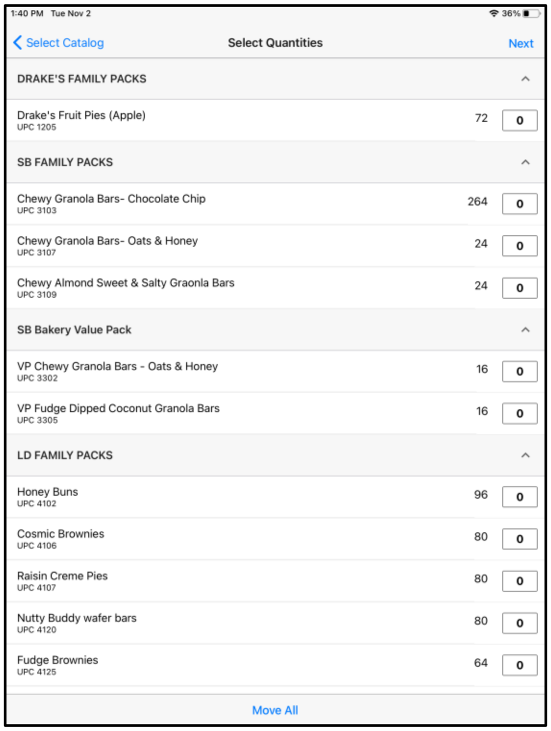




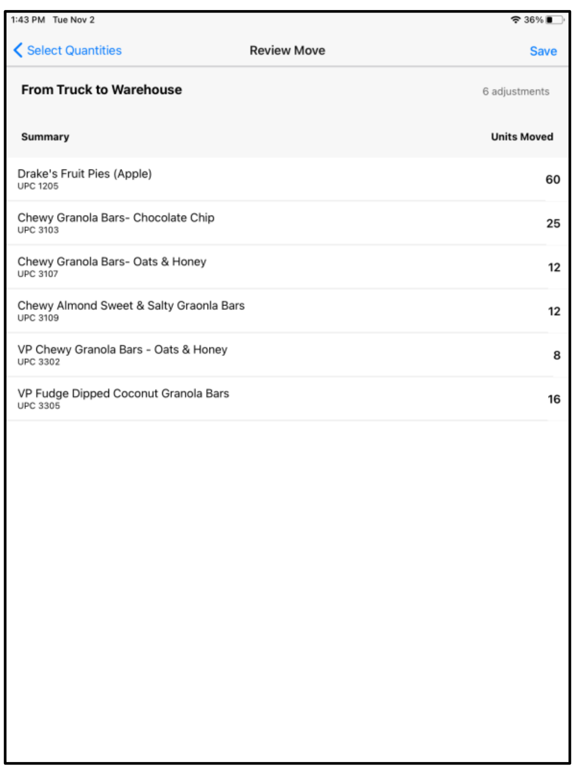
2. Select the catalog you are moving “From” and “To”. Then tap “Next”.



3. Tap the “Product Header”, enter quantities then tap “Next”.



4. Review inventory summary and tap “Save”.

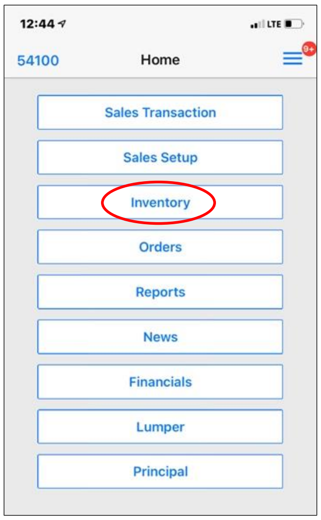


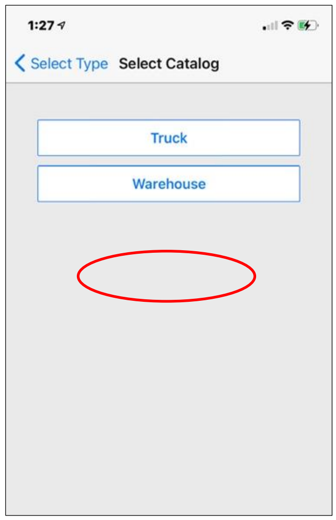
MYBUSINESS – INVENTORY TRANSFER & RECEIVNG

FEATURE SUMMARY:

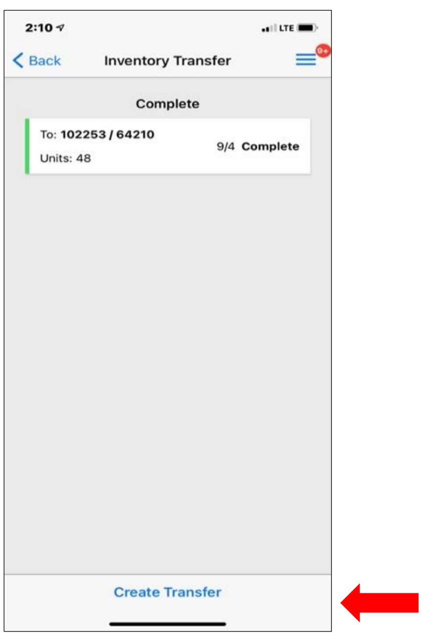
This guide will show you how to transfer and receive inventory between different AR numbers and locations.

1. From the home screen tap on "Inventory". Then tap "Inventory Transfer".



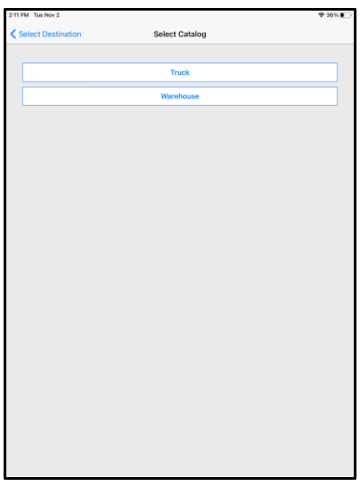


2 Tap "Create Transfer".

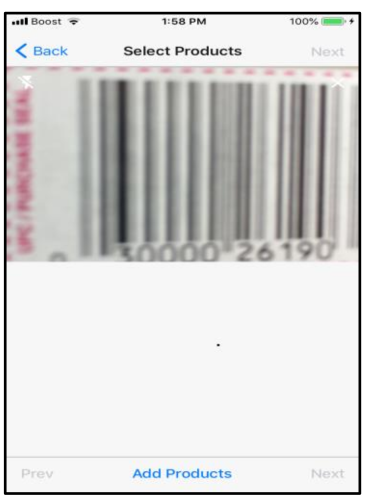


3. Type in the AR Number and Location you are transferring to. If you are exchanging cash, tap the cash transaction check box, otherwise tap “Next”.

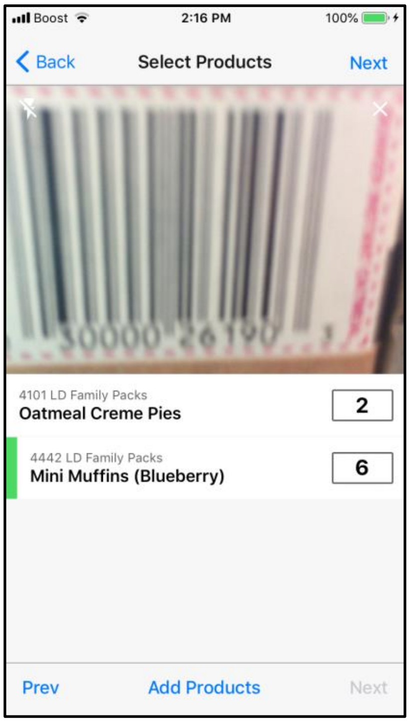
4. Select the catalog you are pulling inventory from.

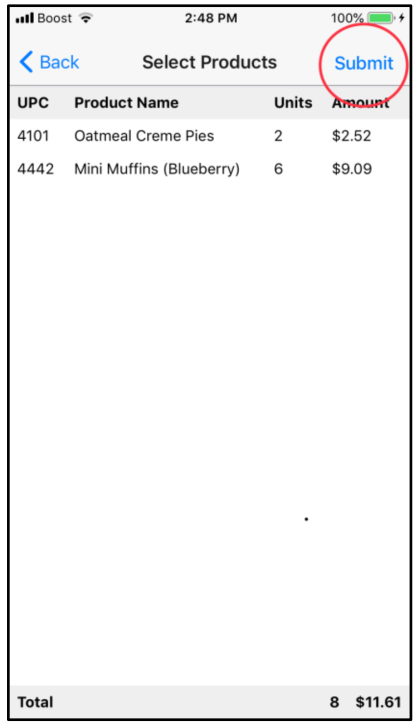


5. Scan or search for the products you are transferring and then tap “Save”.



6. Enter the quantities in units and tap “Next”. Review the transfer summary and tap “Submit”.

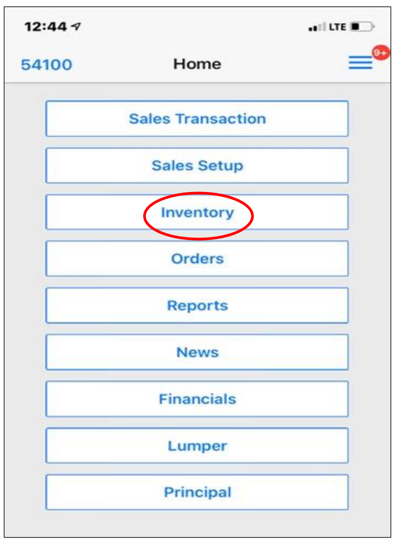


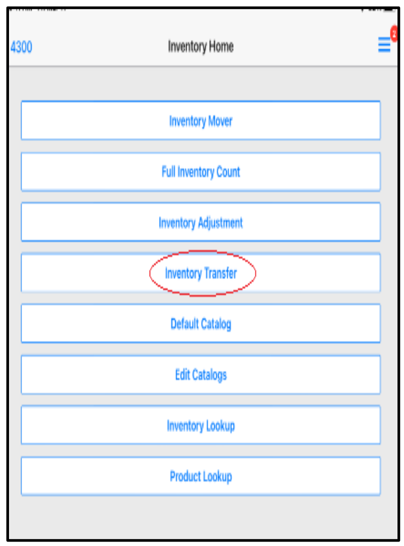


RECEIVING A TRANSFER

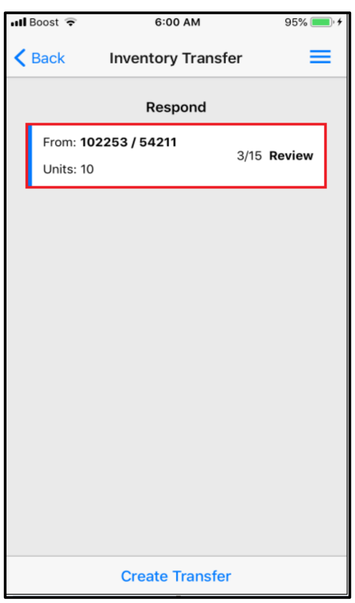
NOTE: *If you do not accept a transfer within 60 minutes, it will be automatically rejected.*

1. From the home screen tap on "Inventory". Then tap "Inventory Transfer".

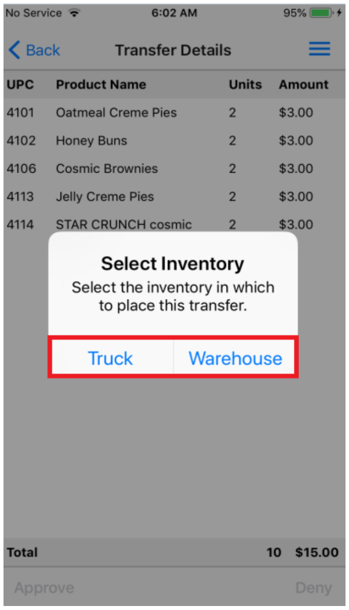


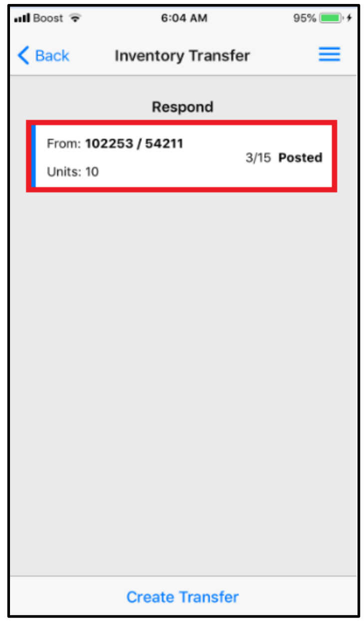


2. Tap on the transfer you would like to receive. Then tap "Approve" or "Deny" the transfer.

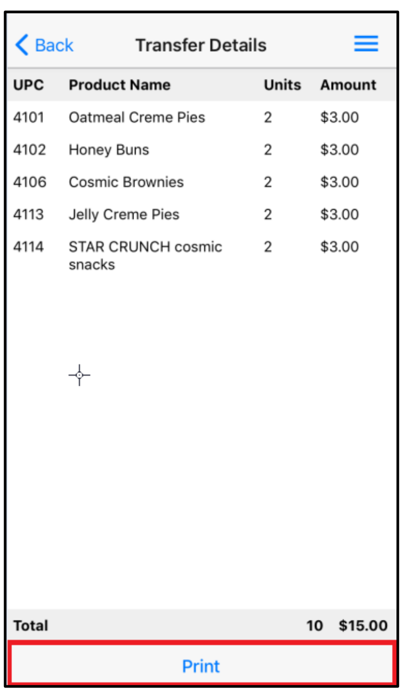


3. Tap which inventory catalog you want the product to be applied in. Completed transfers will be displayed on the “Inventory Transfer” screen. Select the transfer once again.





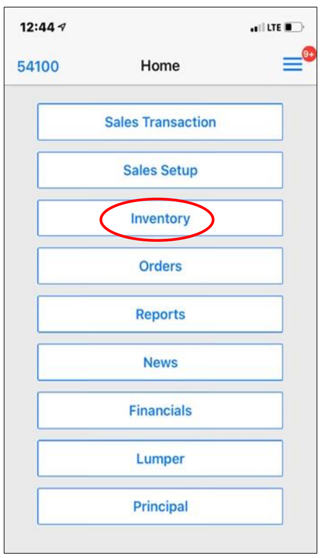
4. You can now print the transfer from the “transfer Details” screen

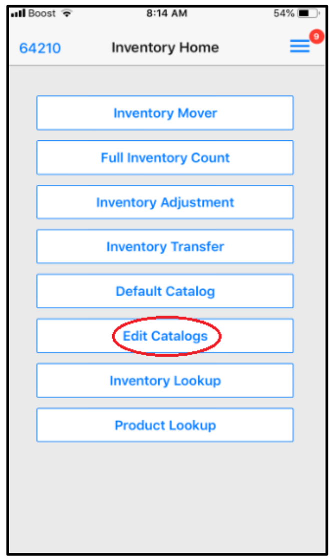


MYBUSINESS –ADDING INVENTORY CATALOGS

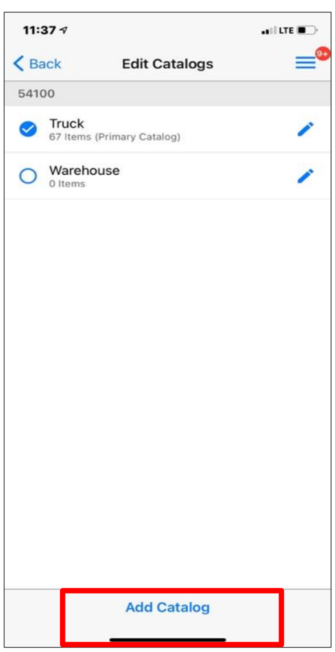
FEATURE SUMMARY:
This guide will show you how to add an inventory catalogs. By default, there are two catalogs per location (1 truck and 1 warehouse).

1. From the home screen tap on “Inventory”. Then tap “Edit Catalogs”.



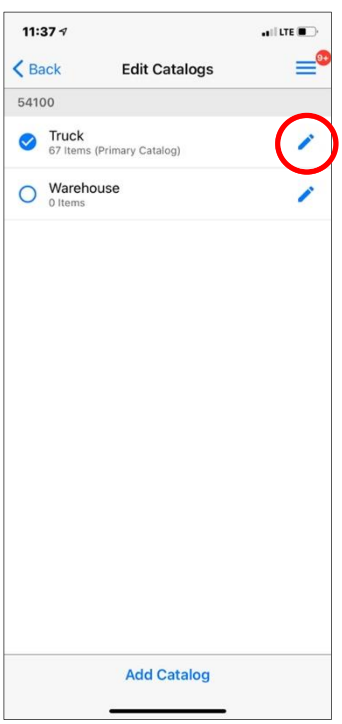


2. Tap “Add Catalog”.



3. Type in the name of the catalog. Then tap “Save”.

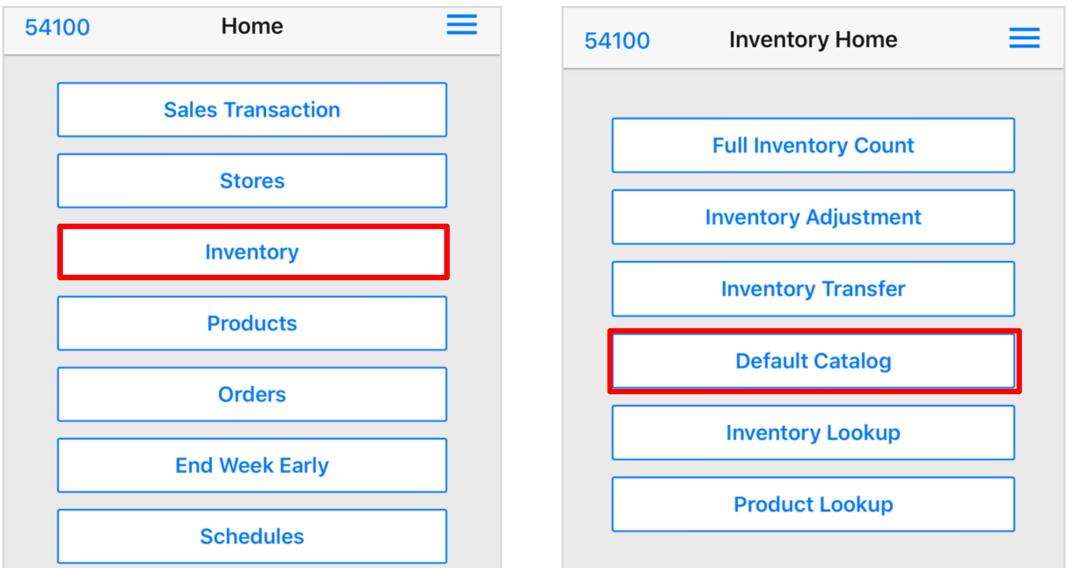
4. If you wish to edit the name of an existing catalog, you may do so by tapping on the pencil icon. Tap the catalog name to rename the catalog. Then tap “Save”.



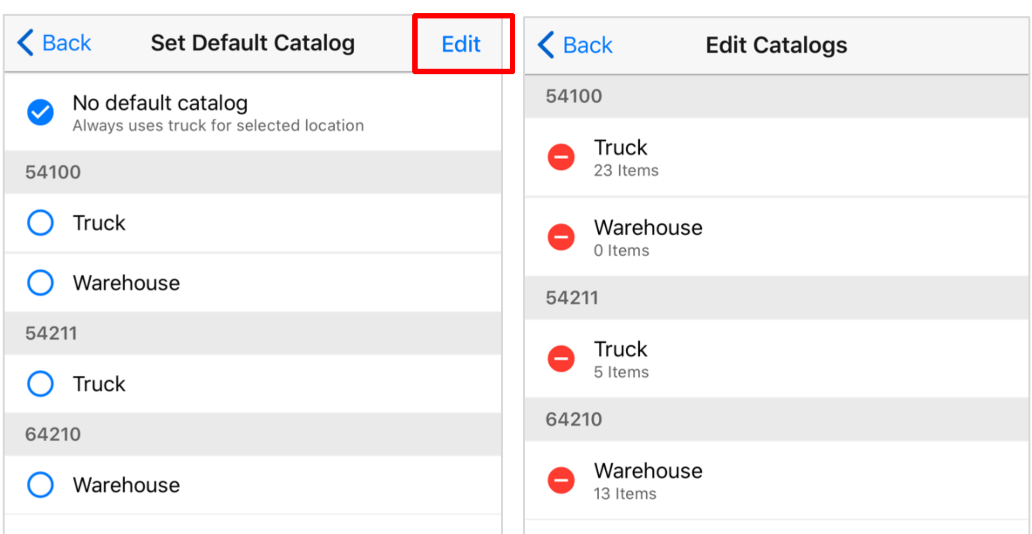
MYBUSINESS - DELETING AN INVENTORY CATALOG

FEATURE SUMMARY:
My Business users will be able to delete an inventory catalog that is no longer useful. The app's default is setup to have two inventory catalogs (truck and warehouse). Many distributors load all inventory that is delivered on their truck and do not have a need for two catalogs. To streamline inventory management for those with this use case, users can delete the unused catalog (usually the warehouse catalog). If a user wants to get this catalog back one day when their business changes, they can call Distributor App Helpdesk to get it added back.

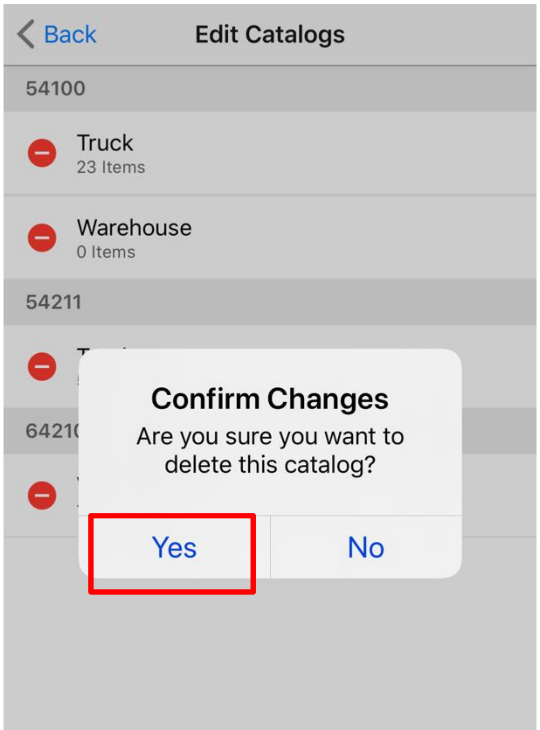
1. From the Home Screen or the three bar menu, tap "Inventory." Tap "Default Catalog."



2. Tap "Edit" and then tap the red circle that is next to the catalog you wish to delete.



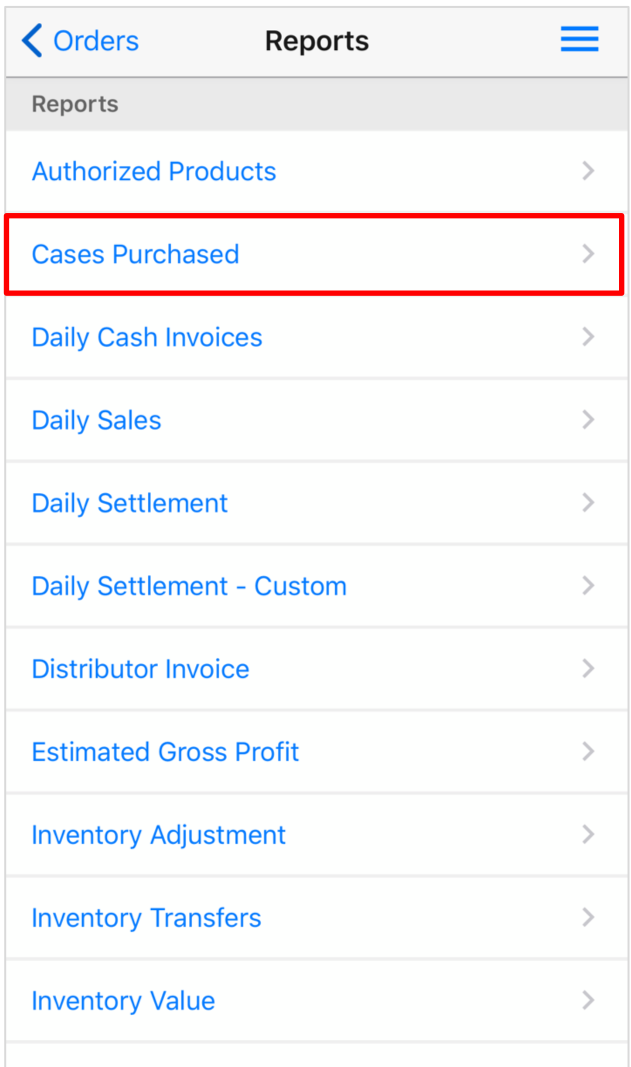
3. Tap “yes” to confirm that you wish to make these changes.

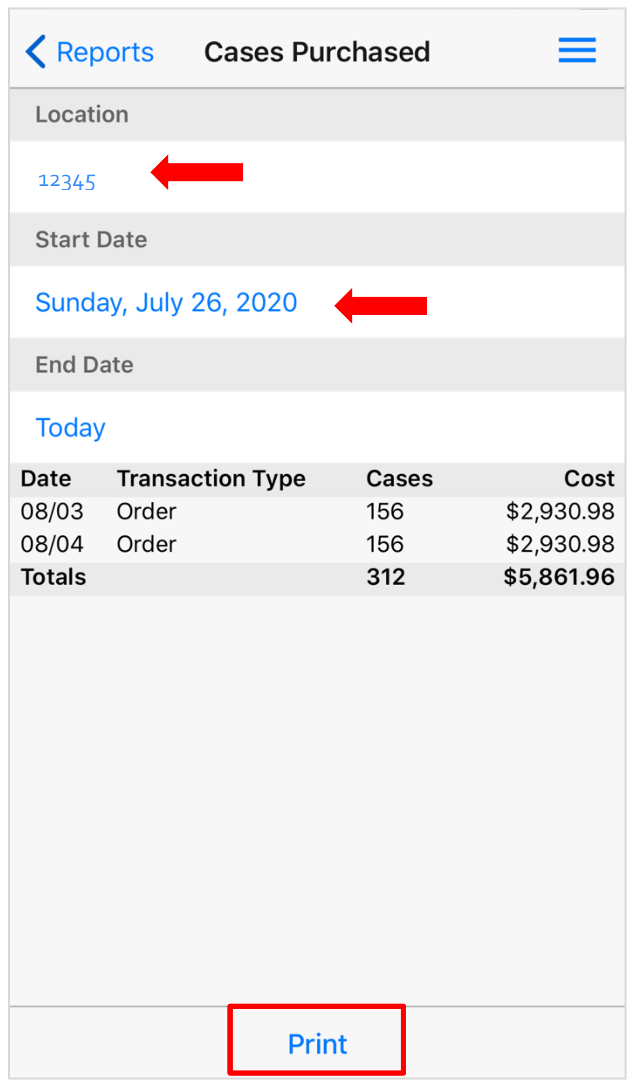


MYBUSINESS REPORTS > CASES PURCHASED

FEATURE SUMMARY:
My Business users will be able to view a report detailing the cases ordered for a period of time.

1. From the Home Screen or the three-bar menu, tap “Reports.” Tap “Cases Purchased.” Edit the Location and Start Date. You will be able to print this report when the data populates.



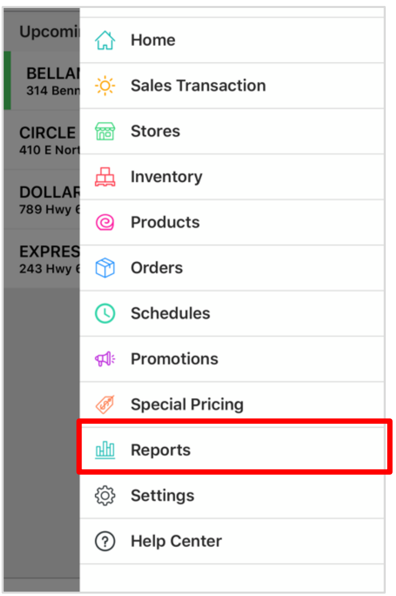


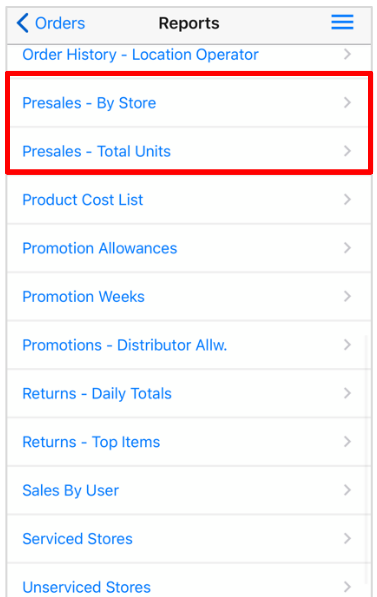
MYBUSINESS REPORTS > PRESALE REPORTS

FEATURE SUMMARY:

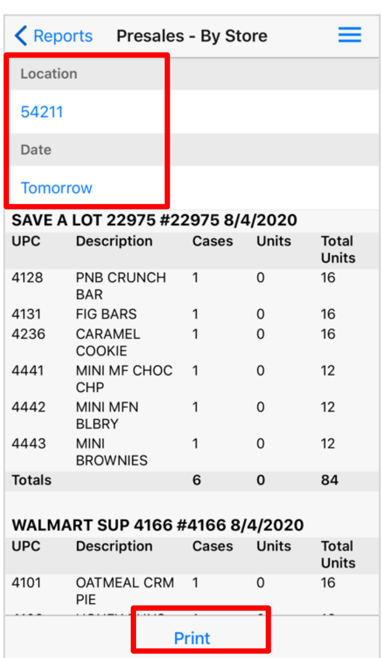
My Business users will be able to view two new reports that details presales for a time period. As a Principle Distributor, it would be helpful to see all the presales for a location in one place in order to make adjustments in an efficient manner.

1. From the Home Screen or the three bar menu, tap "Reports." Tap "Presale-By Store or Presale-By Total."





2. Tap under the location and date fields to select the location and date desired. The report will populate, and you will be able to print if necessary.

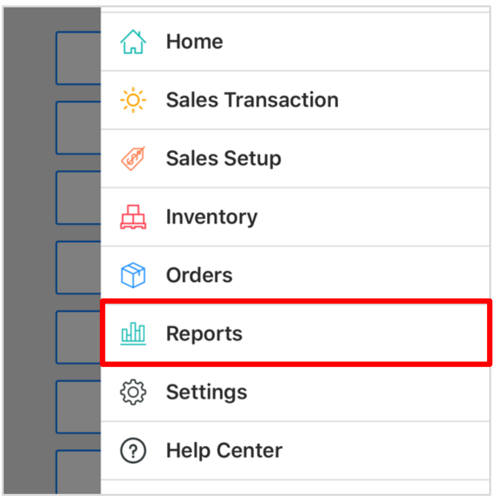


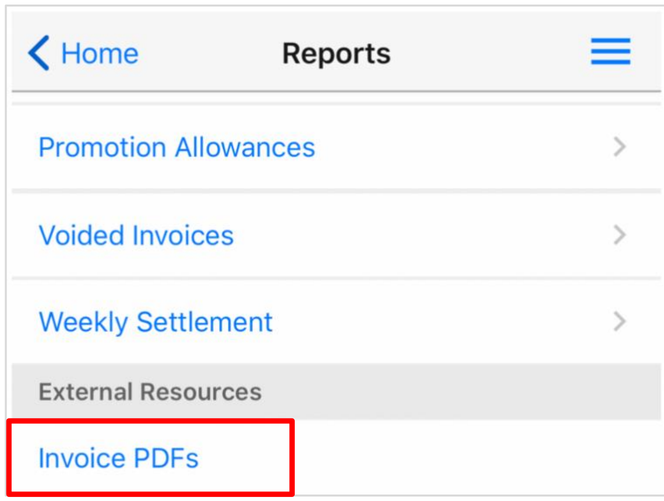
MYBUSINESS REPORTS - INVOICE PDF EMAIL

FEATURE SUMMARY:

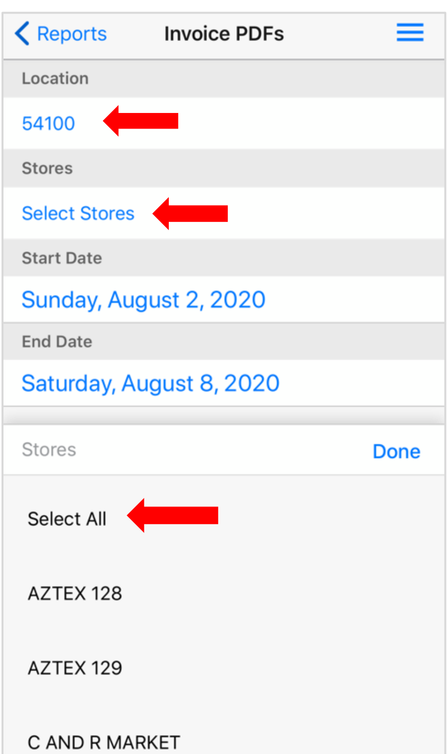
Principal distributors utilizing the MyBusiness app to operate their business will now be able to send themselves an email with a PDF of all of the invoices for a retailer, day, or time period. The invoices are archived for you in bulk for retrieval at your convenience. You will have access to download the files for a specific date range to your own electronic filing system for up to 18 months. These PDFs will also include any photos you have stored with your invoice.

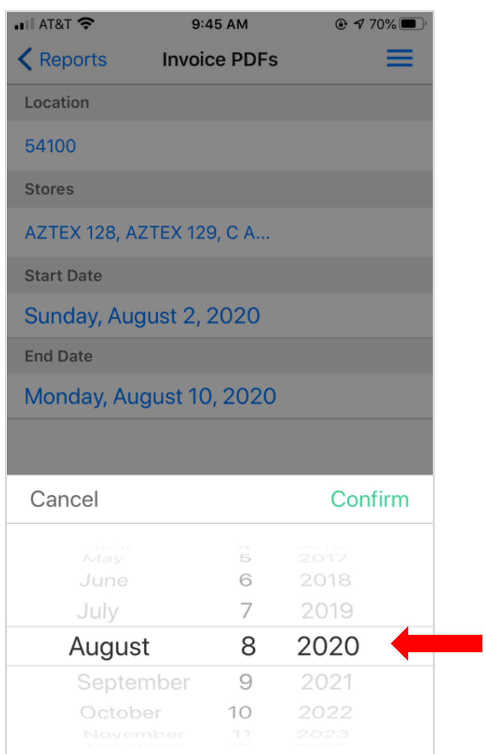
1. From the Home Screen or the three-bar menu, tap “Reports.” Scroll down to the bottom of the list and tap “Invoice PDFs.”



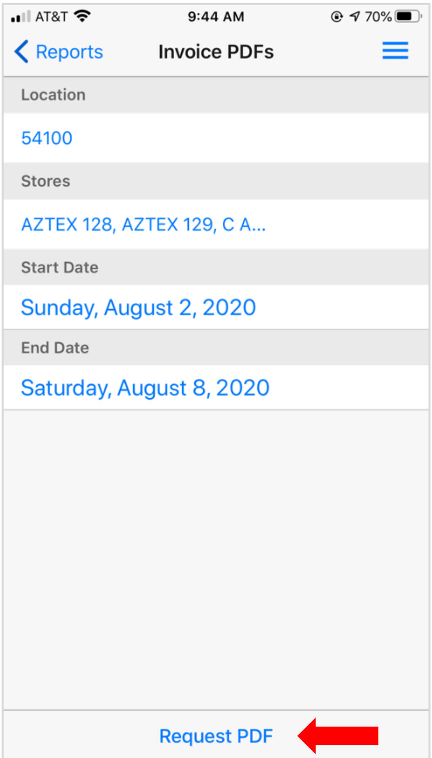


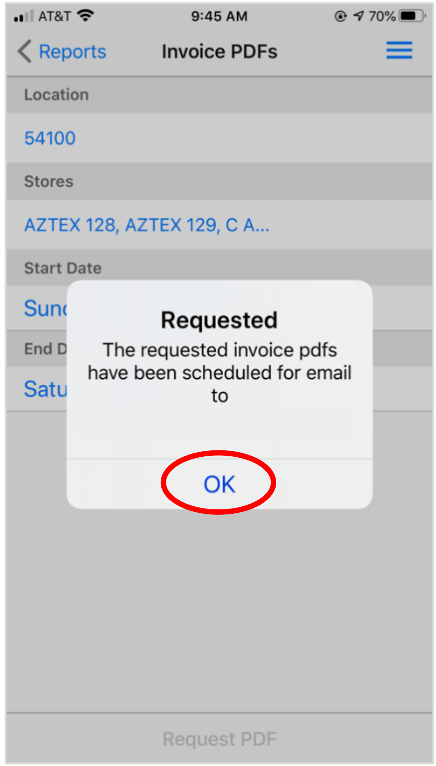
2. The Location, Stores, and Date Range fields are variable. Tap under the Location, Stores, Dates sections to edit these fields. You may select any number of stores or the “select all” choice at the top.



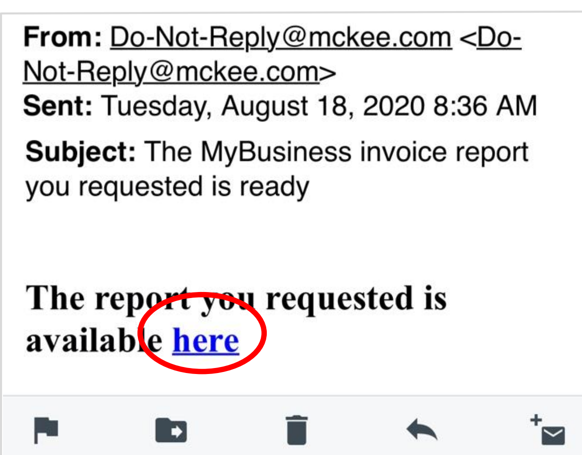


3. Tap “Request PDF” to initiate an email with the requested invoice documents. ***Note - The email may take up to 10 minutes to send.*** Tap “ok” to go back to the home screen.



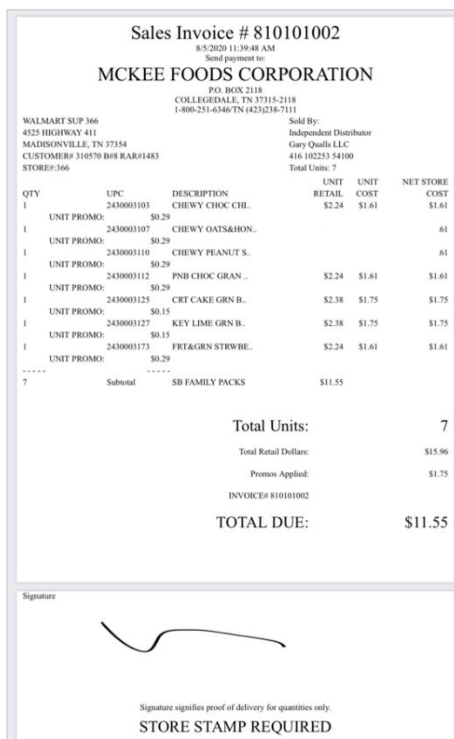


Here is an example of what the PDF Email will look like. You will click on the hyperlink and the PDF will open into a web browser. You will be able to save to your PDF file to your phone or computer.



From: Do-Not-Reply@mckee.com <Do-Not-Reply@mckee.com>
Sent: Tuesday, August 18, 2020 8:36 AM
Subject: The MyBusiness invoice report you requested is ready

The report you requested is available here



Sales Invoice # 810101002
8/5/2020 11:39:48 AM
Send payment to:

MCKEE FOODS CORPORATION
P.O. BOX 2118
COLLEGEDALE, TN 37315-2118
1-800-251-6346/TN (423)238-7111

WALMART SUP 366
4525 HIGHWAY 411
MADISONVILLE, TN 37354
CUSTOMER# 310570 B#8 RAR#1483
STORE#:366

Sold By:
Independent Distributor
Gary Qualls LLC
416 102253 54100
Total Units: 7

QTY	UPC	DESCRIPTION	UNIT RETAIL	UNIT COST	NET STORE COST
1	2430003103	CHEWY CHOC CHI..	$2.24	$1.61	$1.61
UNIT PROMO:	$0.29				
1	2430003107	CHEWY OATS&HON..			.61
UNIT PROMO:	$0.29				
1	2430003110	CHEWY PEANUT S..			.61
UNIT PROMO:	$0.29				
1	2430003112	PNB CHOC GRAN ..	$2.24	$1.61	$1.61
UNIT PROMO:	$0.29				
1	2430003125	CRT CAKE GRN B..	$2.38	$1.75	$1.75
UNIT PROMO:	$0.15				
1	2430003127	KEY LIME GRN B..	$2.38	$1.75	$1.75
UNIT PROMO:	$0.15				
1	2430003173	FRT&GRN STRWBE..	$2.24	$1.61	$1.61
UNIT PROMO:	$0.29				
-----	-----				
7	Subtotal	SB FAMILY PACKS	$11.55		

Total Units: 7
Total Retail Dollars: $15.96
Promos Applied: $1.75
INVOICE# 810101002
TOTAL DUE: $11.55

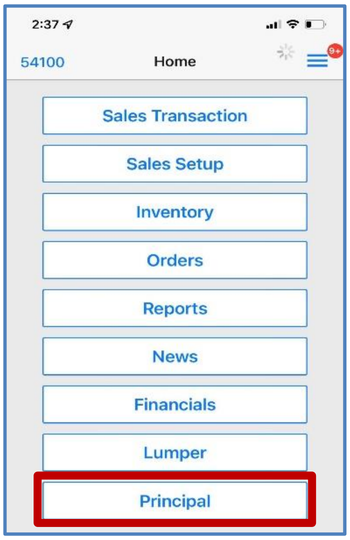
Signature

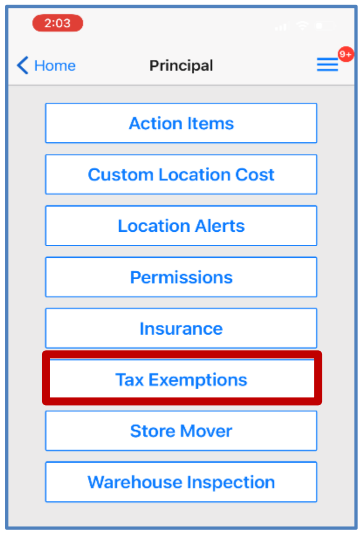
Signature signifies proof of delivery for quantities only.
STORE STAMP REQUIRED

MYBUSINESS – TAX EXEMPTION FEATURE

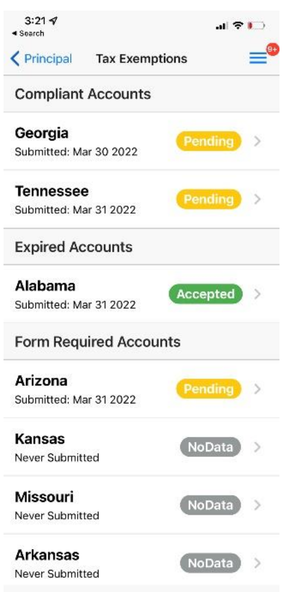
1. Sales tax exemption documents can be entered directly into the MyBusiness app by principal independent wholesale distributors.

2. To access this feature, tap on “Principal” on the home screen, then tap on “Tax Exemptions.”

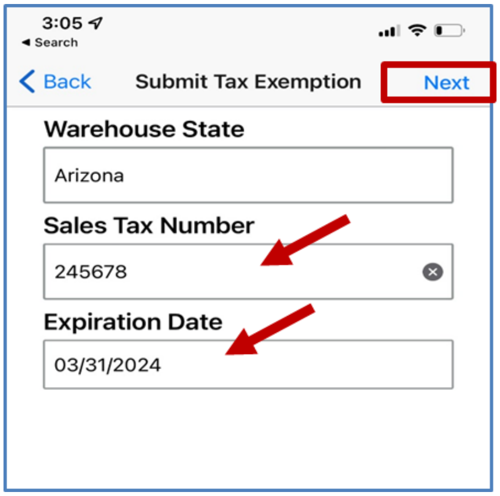




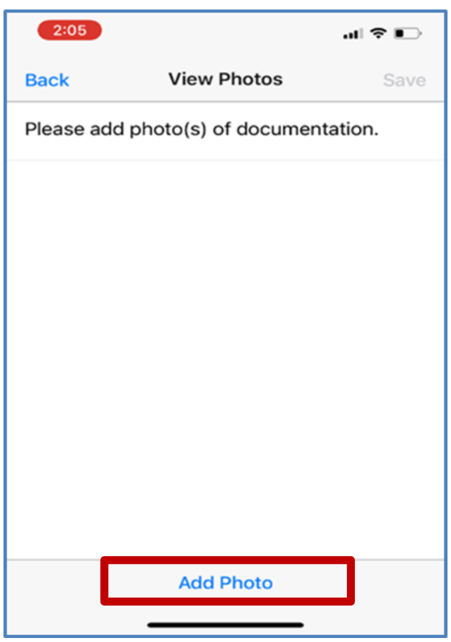
3. Any states where your business has warehouses will appear in the list. If your state does not require documentation, you will not see that state listed.

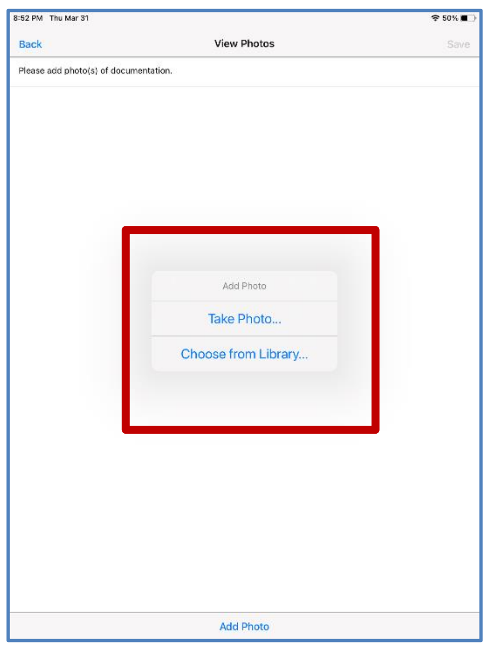


4. Tap on a state, and enter the **“Sales Tax Number”** and **“Expiration Date”** (as applicable). Then tap **“Next.”**

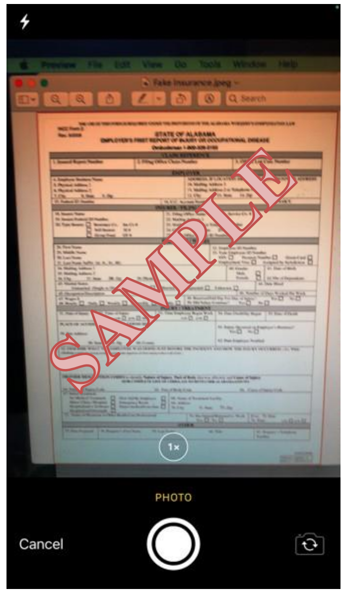


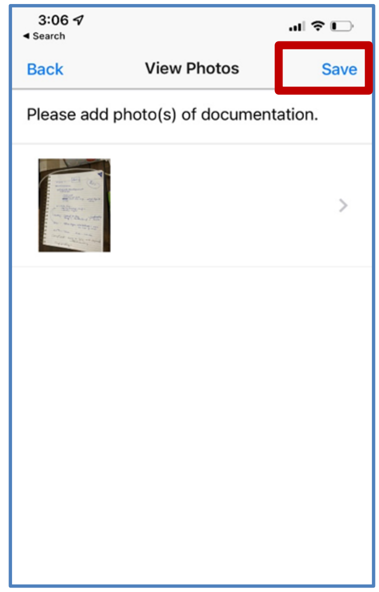
5. Add a photo of your information by tapping **“Add Photo”** at the bottom of the screen. *MyBusiness will ask for access to your photos. Choose either **“Select Photos”** or **“Allow Access to All Photos.”*** To add a photo, tap on either **“Take Photo”** or **“Choose from Library.”**



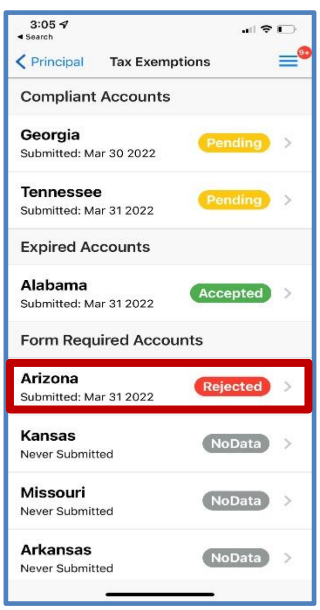


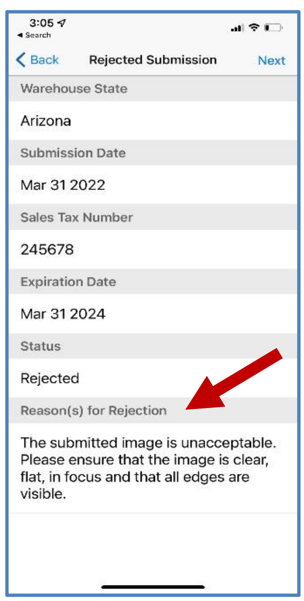
6. You can add as many photos as needed to include every page of your documentation by tapping "**Add Photo.**" When you've added all the photos necessary, tap **"Save"** at the upper right.





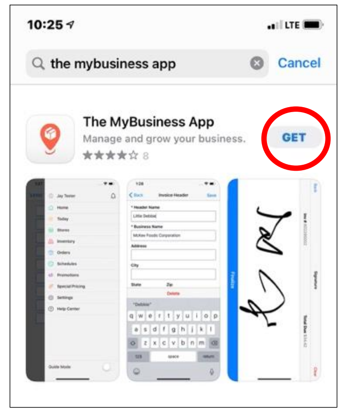
7. The status will change to "Pending" in yellow. Repeat this process for each of your states. Once the information has processed, the yellow will turn green and show as "Accepted." The colored areas reflect the status of each state's current documentation (*Pending, Accepted, Rejected, No Data*). If a photo is rejected, the yellow pending button will turn red and will show as "Rejected." If your entry is "Rejected,"
tap the button to see the reason.





HOW DO I GET THE MYBUSINESS APP?

1. Go to the App Store. Search for “The MyBusiness App”. Tap “Get” to download the app to your device.



2. Please reach out to the DSR in your area so they can schedule to support you or your location operators as you see fit.

WHAT IF I HAVE QUESTIONS ABOUT THE APP?

1. Reach out to the DSR in your territory, as they are always willing to help!

2. Check out the videos, FAQs, and other resources available for you in your app container.

3. If you still have questions, please call Distributor App Helpdesk at 800-447-1264

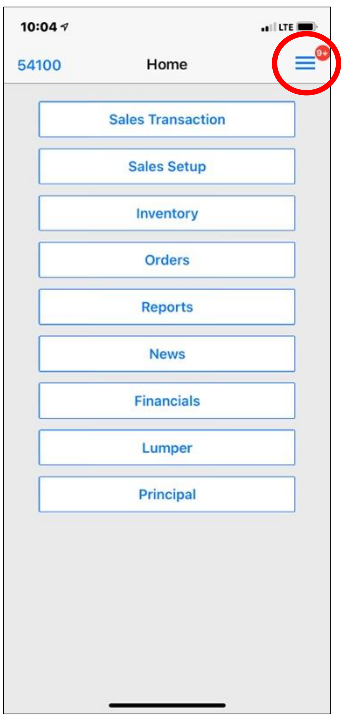
MYBUSINESS – *APP SUPPORT*

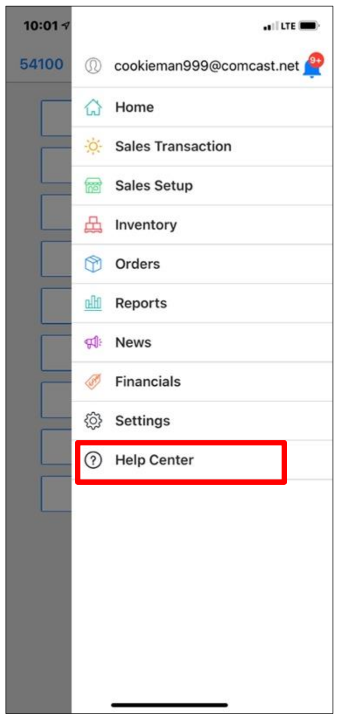
For help with questions, check FAQs or call the Distributor App Helpdesk.

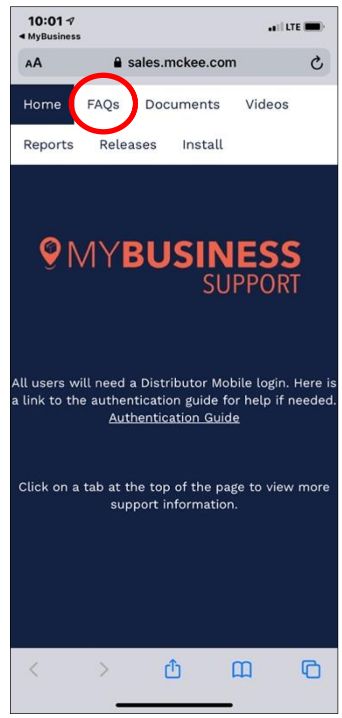
Although you can access the feedback feature in settings, this feature's purpose is for making new feature suggestions, not for getting prompt help with your questions.

APP FAQs

Access FAQs by tapping on the "Hamburger" menu and then tapping on "Help Center".







Call Distributor App Helpdesk for help

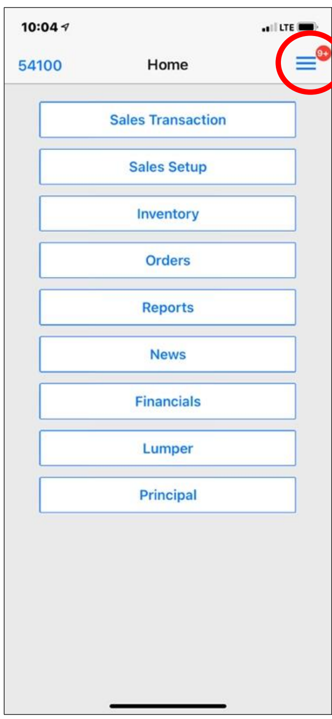
You can reach Distributor App Helpdesk by dialing 800-447-1264.

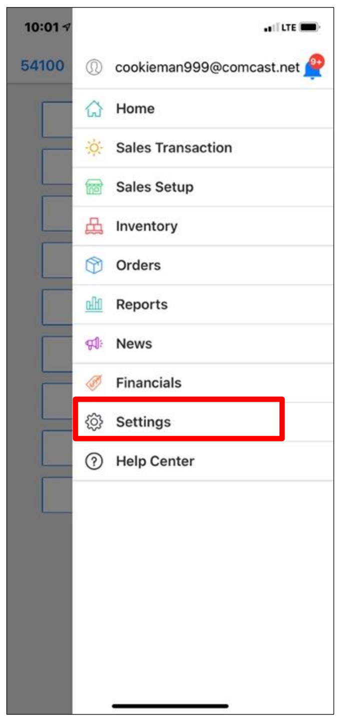
DISTRIBUTOR APP HELPDESK

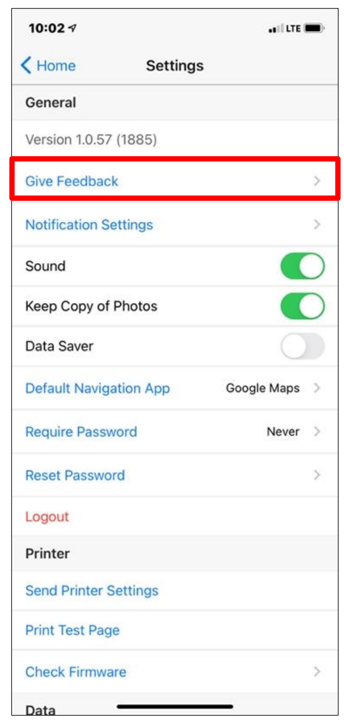
MYBUSINESS - ***TO MAKE A NEW FEATURE SUGGESTION***

Tap on the “three lines” menu, go to “Settings” then tap on “Give Feedback”.

NOTE: *Remember that “Give Feedback” is NOT a help function. It is only for suggesting new features.*







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