

Getting started on Business IT Online...

Managing your account



Change password

We recommend you change your auto-generated password to something more familiar. Click on the **'Change password'** link at the top of the page.



My account

The user that first registers on the site becomes the Primary user. This user can access and change company settings such as Company details, Advertisements and Users. The **'My account'** page is only visible to Primary users and can be accessed either from the internal home page or by clicking on the **'My account'** link at the top of the page.



My advert

Primary users can configure a company advert on Business IT Online that will display via an ad rotation system. Adverts will be displayed both inside (on secure pages) and outside the site. Set up your advert by clicking on the **'Manage my advert >>'** link on the **'My account'** page.



Manage users

Primary users can add Secondary users to their account. Secondary users can be given access to one or more modules but will not have access to the **'My account'** area. Click on the **'Manage users >>'** link on the **'My account'** page to add a Secondary user or modify a Secondary user's module access permissions.



Switch primary user

A Secondary user can become the Primary user by switching. The current Primary user must click on the **'Switch primary user >>'** link on the **'My account'** page and select the Secondary user to switch with.

NOTE – the switch will occur immediately and outgoing Primary user will not have access to modules until permissions are granted by the new Primary user.



Support

Get help by clicking on the **'Support'** link at the top of the page. If you would like to get in touch, submit an online query. Alternatively, review frequently asked questions (FAQs), read our blog or provide us with feedback on your likes and dislikes.

Simple. Secure. Anytime. Anywhere.

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Premium & module information



Premium services

This icon signifies Premium services with additional benefits. Upgrade to our Premium service and you can benefit from a range of more advanced features including more than two users, sales pipeline management, contact history, invoice history, online invoice storage, remote file-sharing and more.



CalendarOnline

Click **'Add item'** to create a calendar item. Calendar entries can be Private (only visible to you) or Shared (visible to all of your team's Calendar users). Business IT Online can send email reminders to you or your entire team if you wish – just check **'Send an email reminder'** on the **'Add item'** page.



CashflowOnline

On the Summary page, click the **'Set opening balance'** link. Follow the on-page instructions to enter the opening balance to which future receipts will be added and from which payments will be subtracted.



ContactsOnline

From the main **'Contacts'** landing page, you can click **'Import contacts'** to upload a list of your contacts from another application. Alternatively, use **'Add person'** or **'Add company'** to store contacts individually.



DocumentsOnline

Free users will be taken to the **'Create document'** landing page upon first clicking into the **'Documents'** module. Here you can create an online invoice (or credit note) and save your default settings making it quick and easy to generate documents in the future. Remember, only Premium users can store documents online.



MarketingOnline

Use the MarketingOnline module to promote your business on Business IT Online with an online profile (a BIO). The **'My BIO'** page displays a preview of your profile as well as statistics about recommendations you have made and received. Click on **'Manage BIO'** to create your profile, carefully entering the information most relevant to potential customers searching for your products and services. Use the **'Promotion activity'** area to manage inbound and outbound recommendations for your business. Upgrade to a premium account to increase your business profile and the visibility of your business to prospects searching for your products and services.