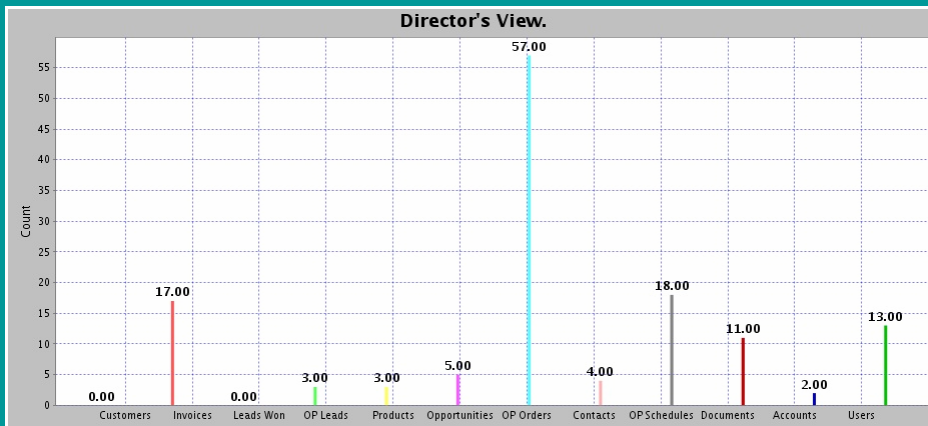


EasyDirector®

Simplifying the way you manage your business...
Quick User Guide

Full-Featured Business
Management Tool - includes
Contact & Customer Relationship
Management



Prepared by AITechConsulting Ltd
www.easydirector.biz
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Install EasyDirector®

1. Download EasyDirector® software from www.easydirector.biz if you do not have an installation CD supplied to you.
2. If you have an installation CD, your user license is in the CD. You will need to install the license from the Administration page of EasyDirector® after the software installation.
3. Insert the CD to start automatic installation.
4. Start EasyDirector®. This might take a moment depending on the size of your computer memory. A browser will pop up with EasyDirector® login page when it is ready.
5. Click on Login and scroll to the bottom of the home page for Administration link.
6. Click on the Administration link.

Setup EasyDirector®

1. Install your license provided on the installation CD.
2. Setup your master profile on the Administration page.
3. Do the following general setting steps on the administration page:
 - I. Click on configure general settings.
 - II. Setup your email and email server. (You may need to contact your internet service provider for some of the information. For example: Verizon or Comcast).
 - III. Select a theme that suites your desired look & Feel of EasyDirector®.
 - IV. Review other configuration data or leave the default values.
4. Scroll down to click on Save for your configuration data.
5. Click on the EasyDirector® logo to go home.

Use EasyDirector®

1. Click on **Contact Manager** to add your contact(s) and customer details.
2. Do a search on the contact added or imported.
3. Click on the Action list provided on the search result
4. Explore all the other actions provided on each contact entered.
5. Click on **Catalog Manager** to add your products and services.
6. Do a search on the catalog page for products/services added or imported.
7. Click on the Action list provided on the search result
8. Explore all the other actions provided on each product or service entered.
9. Follow the EasyDirector® business process diagram to do the following:
 1. Order Check List
 2. Create Sales Quote or Purchase Order
 3. Invoices

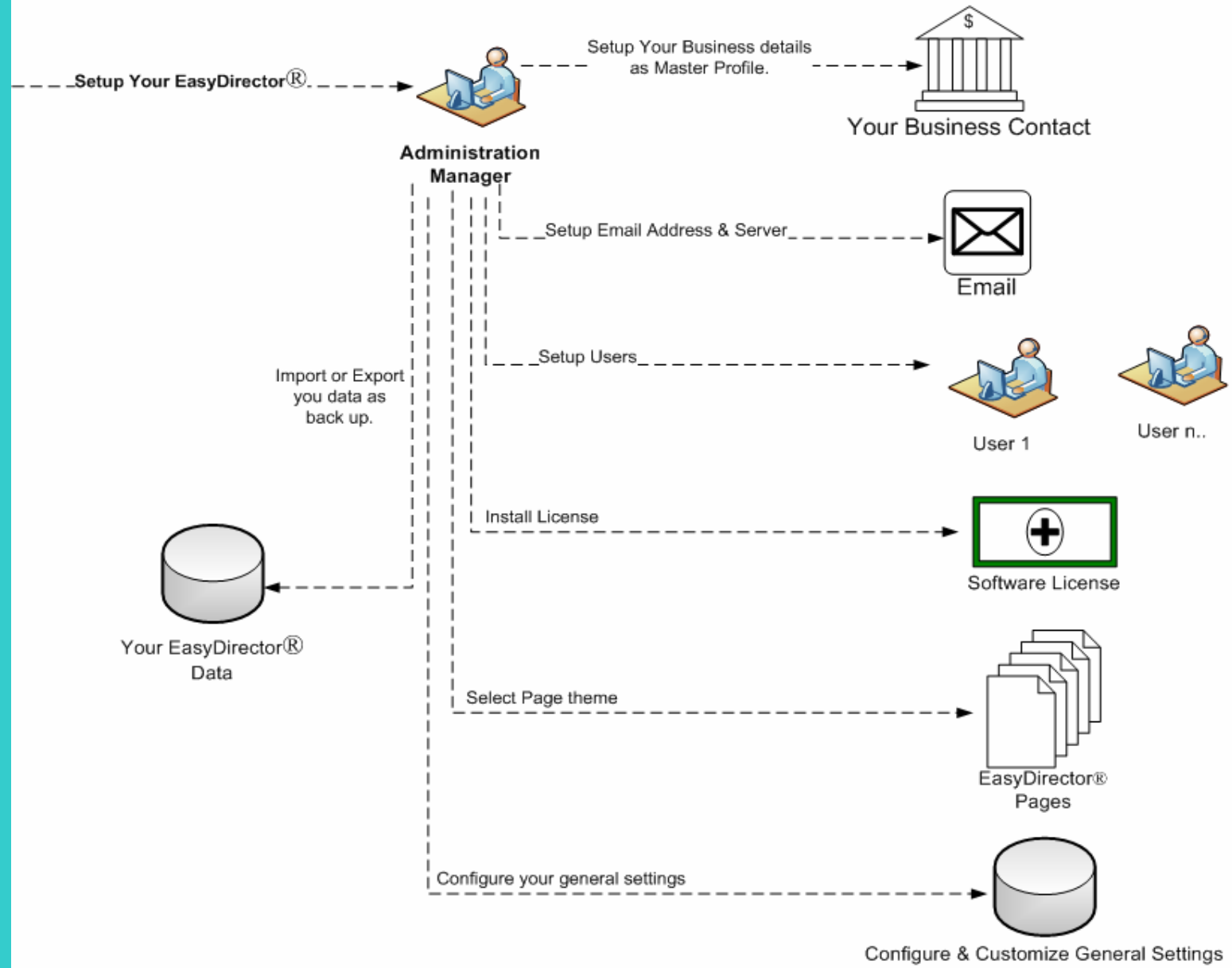
Use EasyDirector®

1. Follow the EasyDirector® business process diagram to do the following:
 1. Create and Track Leads
 2. Send Email Campaign
 3. Schedule Events

2. **NOTE:**
 1. To create Invoice – Create Sales Quote Checklist for the items and customer from the **Catalog Manager**. Then, prepare invoice from the Order Manager Page.

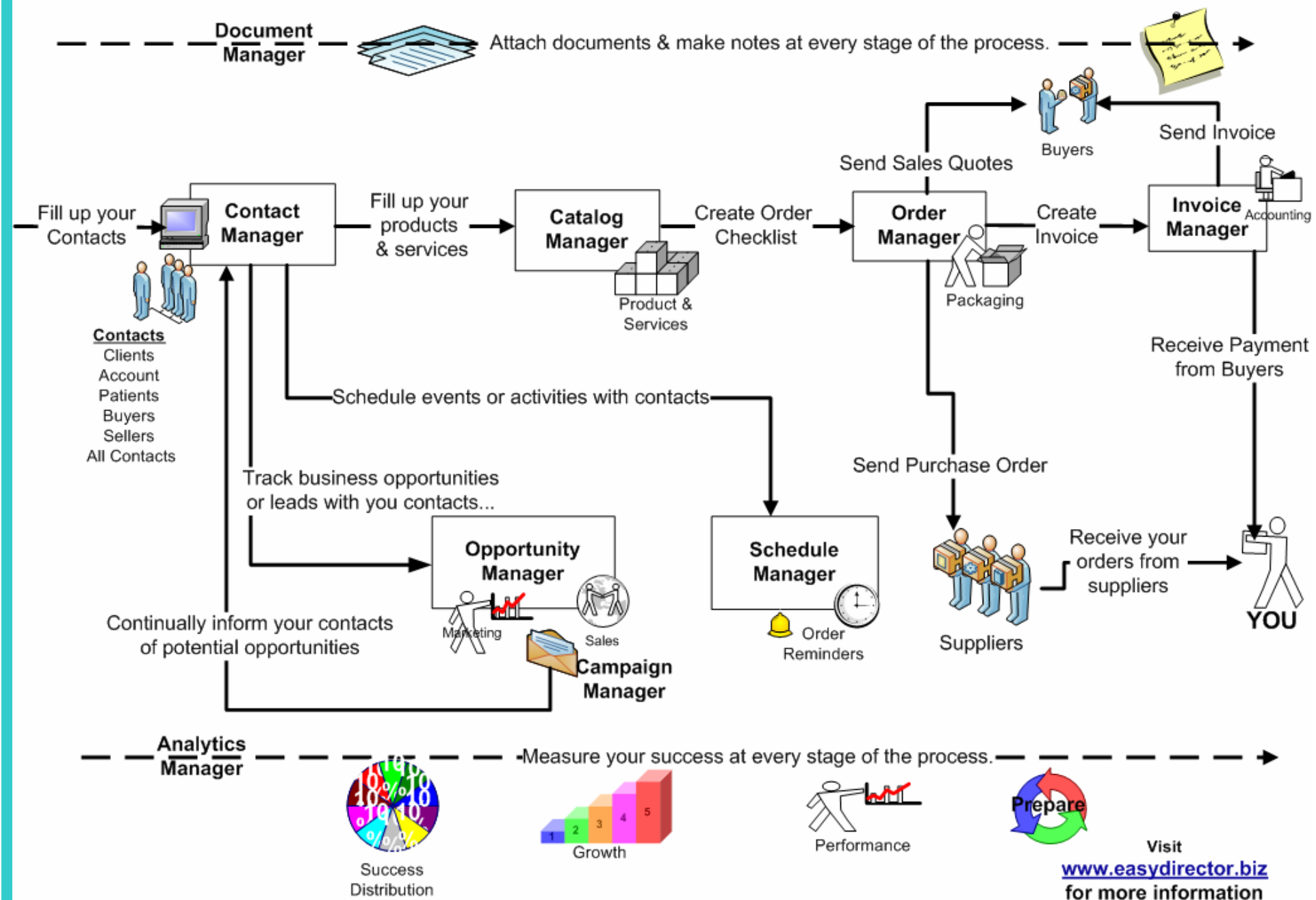
 2. When creating invoices, sales quotes or purchase order, you only have to select **one** item of the order on the Order Manager page. Scroll to the bottom of the page, and select Create Purchase Order... or Create Sales Quote... or Prepare invoice..., all other items with the same order number will appear on the requested document.

EasyDirector® Contact Management Setup Process



Visit
www.easydirector.biz
for more information

Using EasyDirector® Business Process



Installing EasyDirector®

1. Read the user agreement on the CD cover or visit www.easydirector.biz for more information on EasyDirector® software and license agreement. Proceed to the next steps if you agree with the license terms.

2a. Insert the enclosed CD into your computer.

OR

2b. Download software from www.easydirector.biz website.

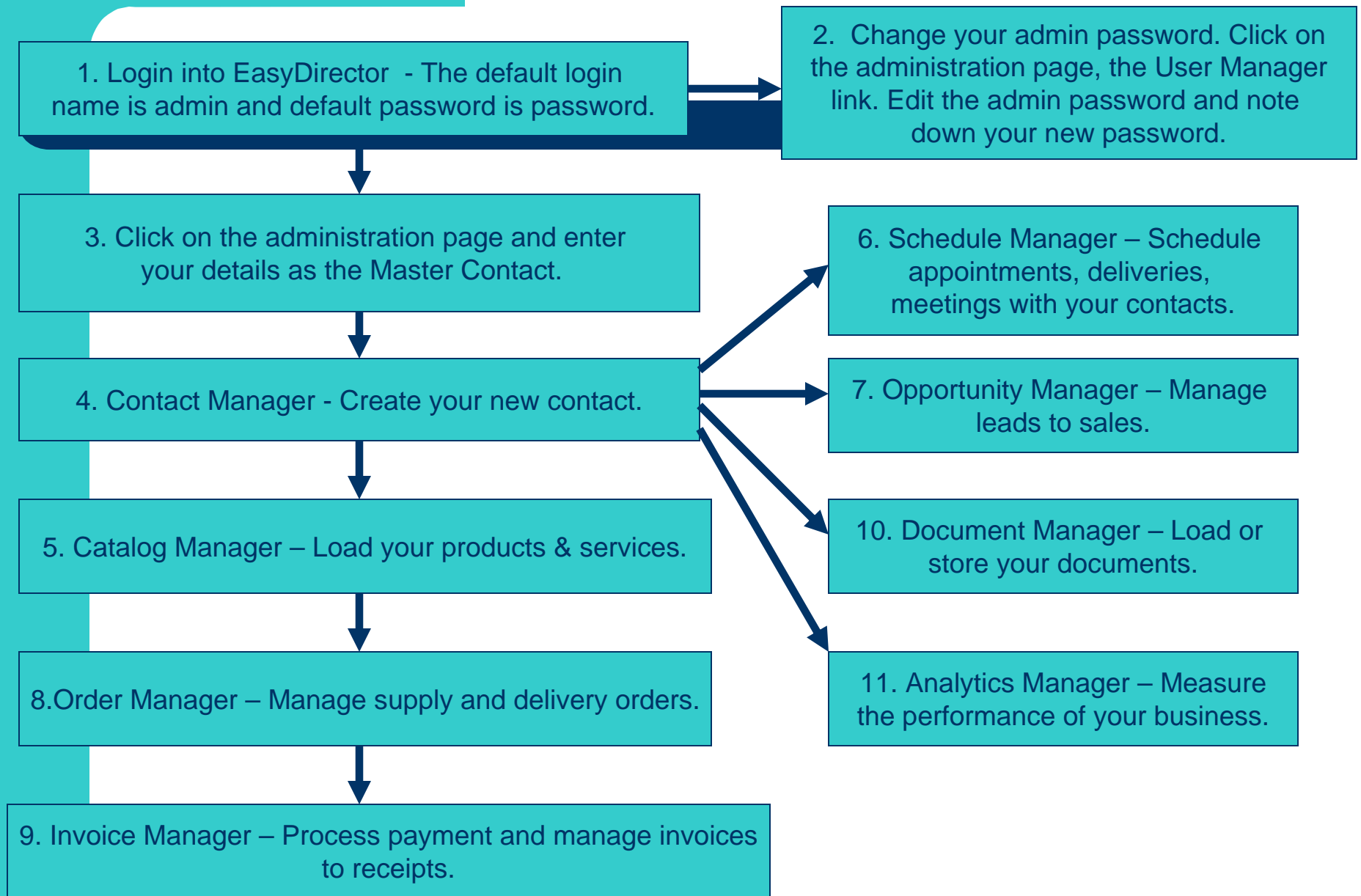
3a. Installation will begin automatically.

OR

3a. Double-Click on EasyDirector.exe or expand the EasyDirector.tar.gz or(.zip) into a desired directory.

4. Follow the instructions on the installation software.

Using EasyDirector®



Contact Management

1. Click on **Contact Manager**.

2. Click on **Add Contact** button to begin the tracking of your relationship with a new contact. E.g. Client, Vendor, Suppliers, e.t.c

3. Search for the Contact if it is not displayed. The **actions column** contain the list of method of tracking your contact relationships.

5. **Add Attachment**. - You can add flyers, business cards, documents, contracts received or given to this contact.

4. Click on the **Action List** arrow to begin the tracking of your business relationships.

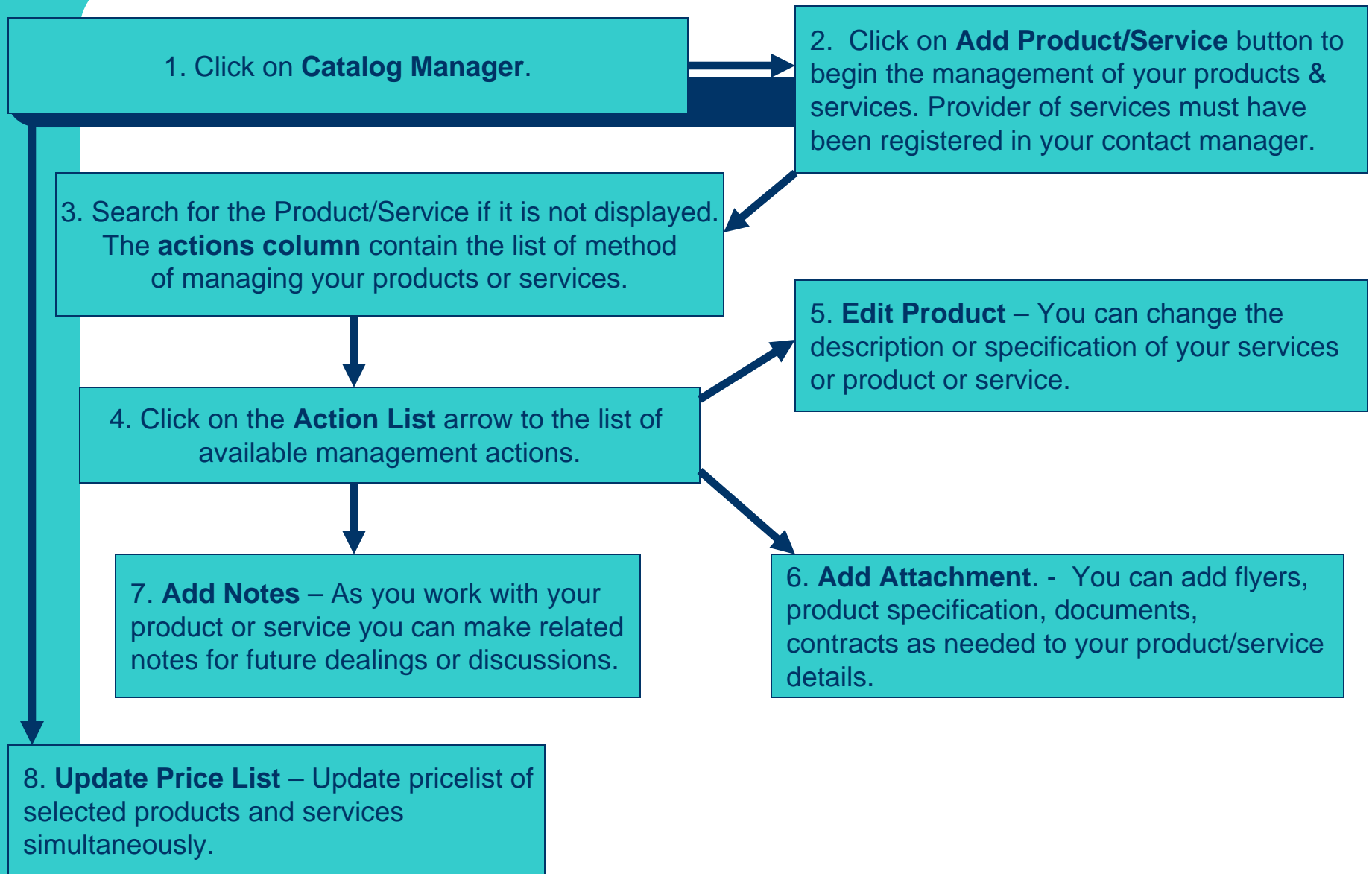
6. **Add Leads** – You can create prospective business leads arising from dealing with your contact.

9. **Add Profile** – This is a description of the contact Portfolio and detailed legal information for a business contact.

7. **Add Notes** – As you work with your contact, you can make notes of all interactions for future dealings or discussions.

8. **Add Operations** – You can expand the details of you contacts from business operation standpoints. i.e. What they do, opening hours, branches etc.

Product/Service Management



Marketing Management

1. Click on **Opportunity Manager**.

1.2. **Create Sales Lead** – You just identify an opportunity to sell your product(s) or service(s) to your contact(s)? Track it by creating the a new sales lead.

1.3. Click on **Campaign Manager**

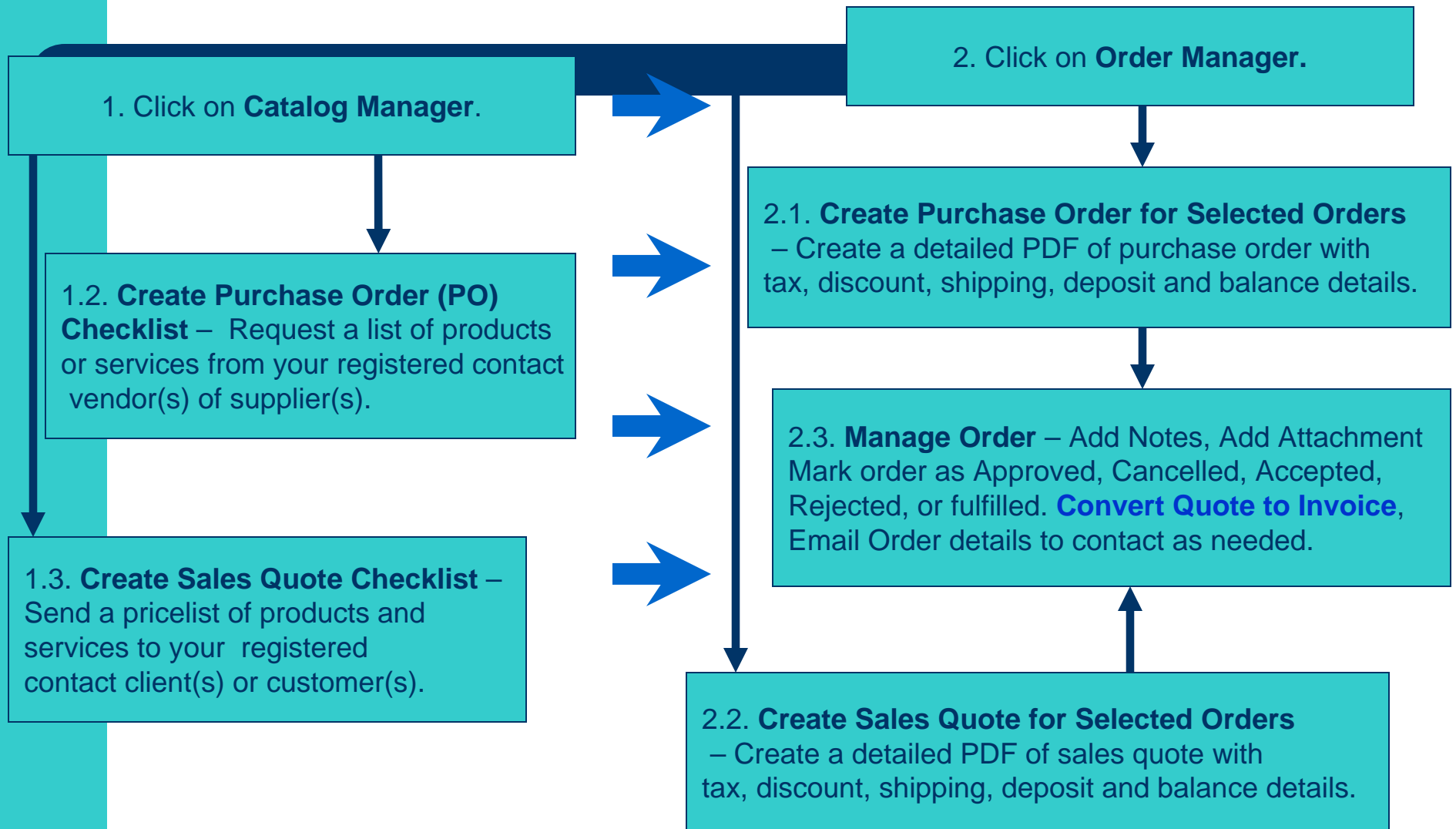
1.3.1. **New Campaign** – Do you need to advertise your product(s) or service(s) or promotions to your prospective contact client(s) or customer(s)? You can send mass email to selected contacts.

1.3.1.1. **Send Email Campaign**

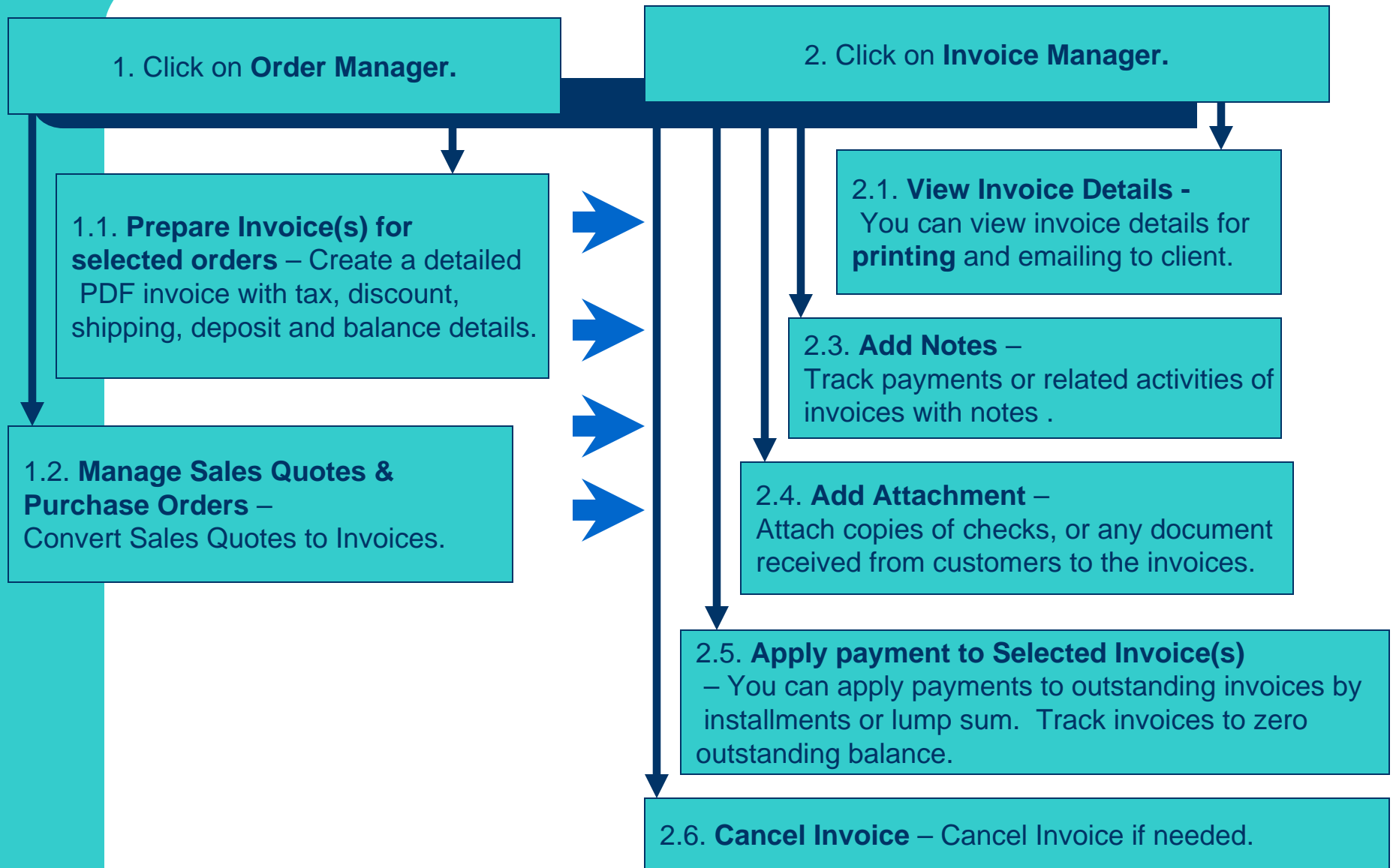
1.4. Click on **Forecast**

2.3. **Revenue Forecast** – Boost your marketing your results focusing on revenue generating services or products. Measure your actual sales against forecasted revenue on products/services, and overall sales.

Sales Automation



Invoicing

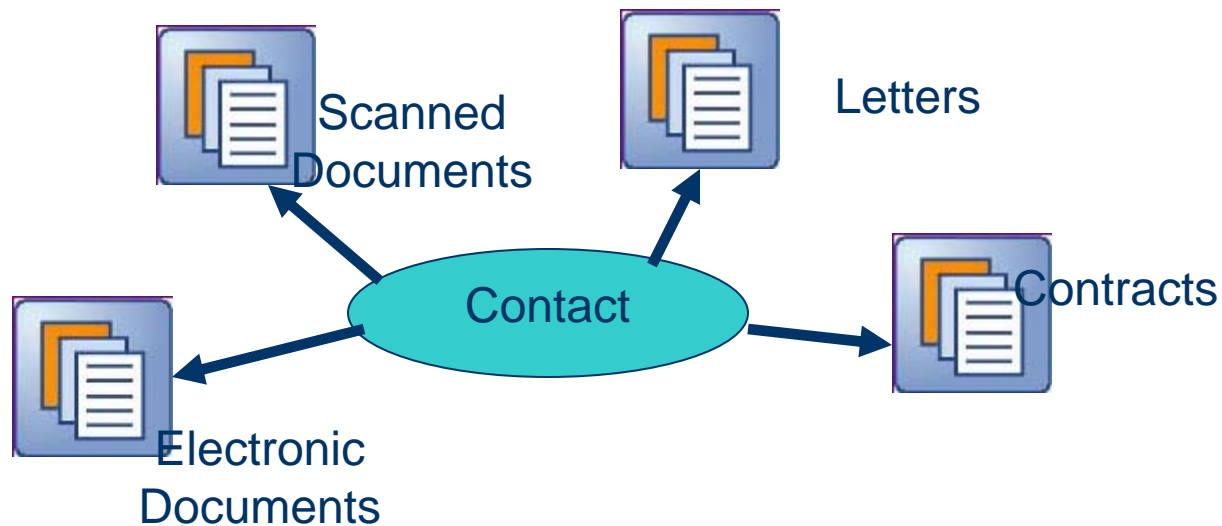


Document Management

1. Click on **Document Manager**. – Organize your documents around your contacts.

1.1. **Add Document** – Documents received from prospective clients can be organized around them for easy future reference.

Create Folder – Enhance your search-ability of documents with folder classification. For example all Marketing documents are under the folder Marketing, even though each document is attached to different contact.



Analytics

1. Click on **Analytics Manager**.

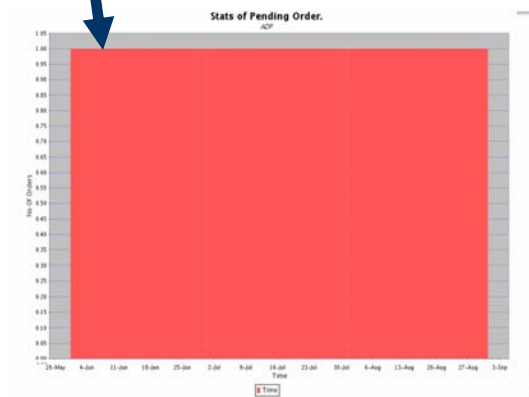
1.1. **Select Business Trend** – Select a business trend to measure over a specific period of time:

- a. Top Pending deals
- b. Closed Deals
- c. Contact Demographics
- d. Revenue
- e. Sales
- f. Orders
- g. Schedules

Pending Schedules.						
Name	Type	Status	Category	Count	Country	Date Posted
Replace with desired subject	Meeting	Scheduled	Automotive	1	Anguilla	2009-06-04 01:33:35.0
Replace with desired subject	Meeting	Scheduled	Agriculture	1	Cameroon	2009-06-04 23:13:54.0
Replace with desired subject	Meeting	Scheduled	Agriculture	3	Albania	2009-07-11 18:58:44.0
Replace with desired subject	Meeting	Scheduled	Agriculture	13	Albania	2009-08-02 20:15:54.0
Replace with desired subject	Meeting	In Progress	Art	1	Andorra	2009-08-07 10:06:01.0

Report Format – Table with data of results is displayed.

Graph Format – Pictorial Representation of result is displayed.



Software and business guide to help you simplify the way you manage your business...
Your service is a priceless asset and the time you spend growing and maintaining your client and contact relationships can be made more effective and efficient with EasyDirector® customer and contact relationship management software.

AITechConsulting Ltd provides you with a guide to walk you from your current business process to an automated and structured process implemented with EasyDirector® software. Business guide is \$30.00 and Software license is \$99.99.

What do you get with EasyDirector®?

1. Software providing a complete and integrated view of your contact relationships
2. A management tool to impress your contacts with prompt follow-up.
3. A personal guide to assist you in informed decision making to advance your business.

AVAILABLE NOW!!!

The book cover features the title 'Manage Your Business Contacts Easily with EasyDirector®' in bold black text. Below the title is the subtitle 'The Quick Solution To Organize and Manage Your Customers and Contacts'. The cover image shows a hand holding a pen over a globe. A purple circular badge on the right side of the cover says 'Pocket Companion Book with Software!'. At the bottom, it says 'FIRST EDITION' and 'AITechConsulting'.

AVAILABLE AT: WWW.XLIBRIS.COM/BOOKSTORE
888-795-4274 EXT. 7876
INTERNATIONAL ORDERS: ORDERS@XLIBRIS.COM

The EasyDirector® **business guide** is available for sale at the location shown above and at www.amazon.com website.

The license for easydirector **software** can be purchased at www.easydirector.biz

The CD-ROM graphic is circular with a white background. At the top, it says 'AITechConsulting Ltd makers of'. Below that is the 'ED' logo in large black letters, followed by the tagline 'handling your business with ease'. The main title 'EasyDirector™' is in green. Below the title is the text 'for Contact & Customer Relationship Management...'. There are two small images: one of hands shaking and one of a person at a desk. Below the images is the section 'Why EasyDirector?' with a short paragraph. Underneath is the 'Installation:' section with a list of three steps. At the bottom, it says 'Technical Support: Visit www.easydirector.biz (c) 2009 AITechConsulting LLC. All rights reserved.'

AITechConsulting Ltd makers of

ED handling your business with ease

EasyDirector™

for Contact & Customer Relationship Management...

Why EasyDirector?
Boost productivity, efficiency & ultimately revenue through improved & automated relationship management. Manage contacts, product catalog, opportunities, invoices, documents, orders and appointments with EasyDirector software.

Installation:
Autorun should begin setup upon inserting the disk. If not:
1. Click EasyDirector-xxx-Setup.exe. 2. Select preferred language.
3. Follow the instructions on the screen to setup EasyDirector software.

Technical Support: Visit www.easydirector.biz
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All rights reserved.

The heart of your business is the service it provides and the individuals who benefit. Why not maximize your relationships with your customers & contacts and use the time tested skill of customer and contact management made more efficient with technology? EasyDirector® is a solution to improve contact and customer relationship management!