

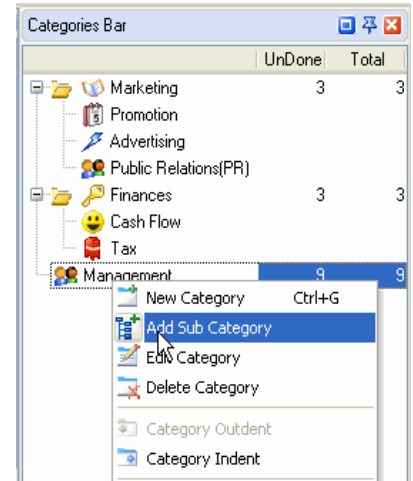
Start Up Guide

By starting and managing a small business you can take an opportunity to realize the best of your experience and skills, however you will have a lot of things to do and it will be hard to get them done without a to do list.

Step 1. Plan your business process

Business planning is one of crucial points. It conveys your business goals and strategies, potential problems and ways to solve them. It will help you to make business decisions and manage your resources.

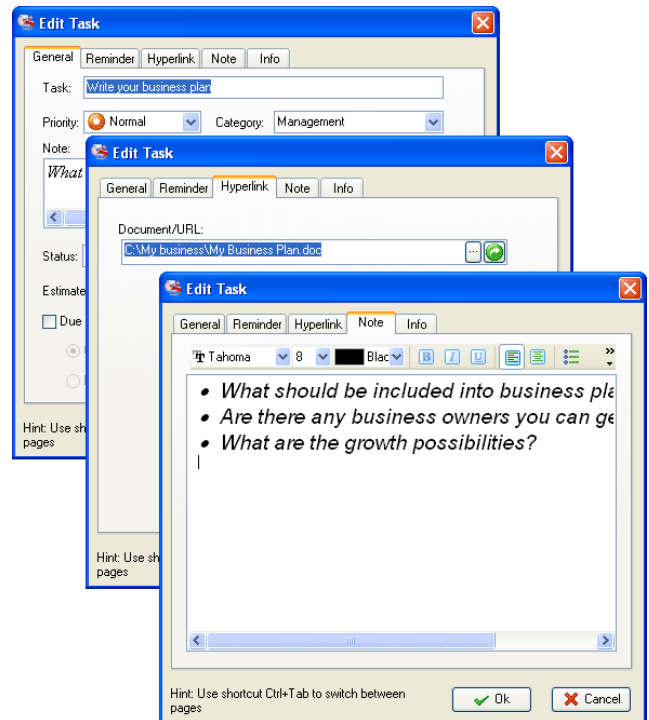
- Create Categories (**Categories -> New Category** or Click right button of the mouse on **Category Bar** and select **New Category**)
- Create Subcategories (**Categories -> Add Sub Category** or Click right button of the mouse on **Category Bar** and select **New Sub Category**)



Step 2. Make a list of your business tasks

The success of the project depends greatly on its detailed plan. Make a list of all the jobs to be done and all problems to be solved, then use it as your business checklist.

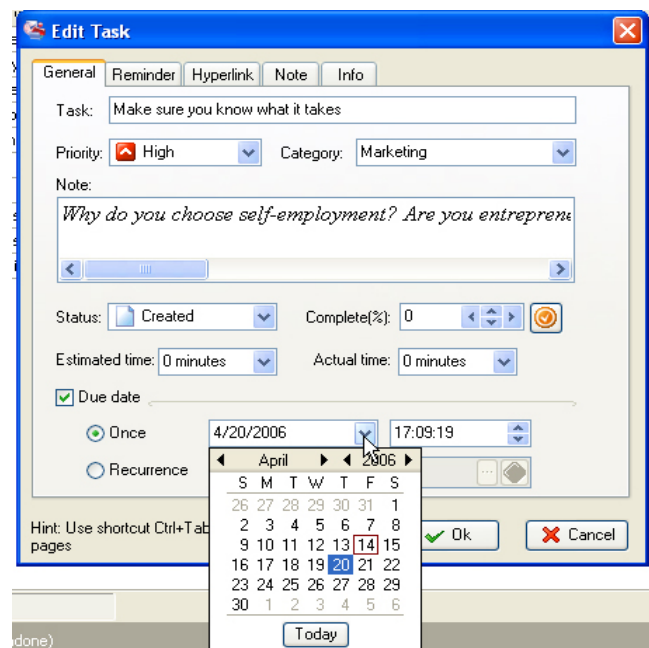
- Set filter on a category or subcategory (double click on category or subcategory in Categories Bar)
- Create tasks (**Tasks -> Create Task** or **Create Task** button **Ins** or **CTRL + ALT + A**)
- Fill in a task name and click OK (**Create Task** dialog)
- Use RTF Editor to make notes (**Edit Task -> Notes**)
- Use quick access to business documentation for specific tasks (**Edit Task -> Hyperlink**)



Step 3. Schedule your business tasks

You will need all your time management skills and experience to set realistic deadlines for your business activities.

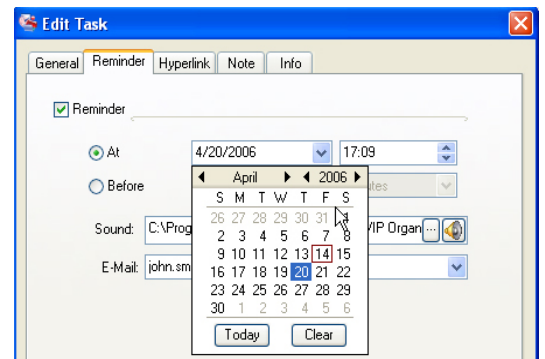
- Open Edit Task dialog (**Double click** on a task in the Task Grid or **Edit Task** button or **F4** or click the **right button** of the mouse on a task and choose **Edit Task**)
- Estimate time needed for each task and see total time required (Choose appropriate time period in drop down list or type it in **Estimated Time** field)
- Activate Due Date option (**Tick** in **Due Date** checkbox)
- Set Due Date and Time for common non-recurring tasks (radio button **Once**, drop down **Calendar** and **Time** field)
- Set Due Date and Time for recurrent tasks (radio button **Recurrence**, enter **Time Interval**, **Start Date**, **End Date**)



Step 4. Set Reminder

Having created your own timetable for every business day, you can set reminder not to miss a thing. Choose pop-up message on your screen or sound alert, as well as email or text message to your mobile.

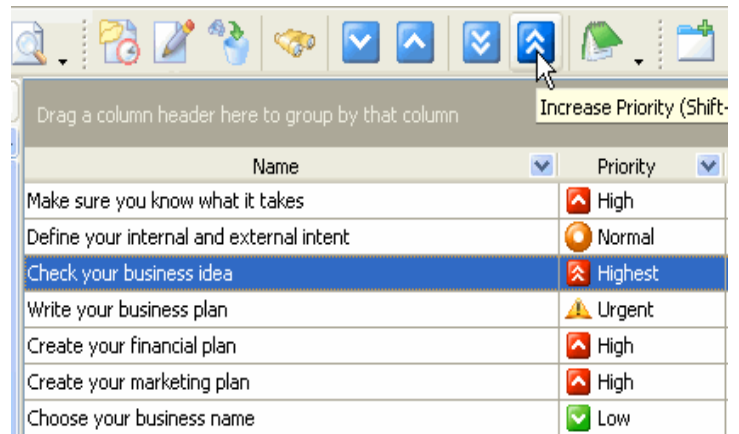
- Set Reminder for milestone dates (**Edit Task -> Reminder**)
- Don't forget to use SMTP settings before sending information by email (**Tools -> Options**)



Step 5. Prioritize your business tasks

Set priorities. According to Pareto Principle only 20% of your business tasks lead to 80% of success, so some of your 'to do items' are critical, others are not so important.

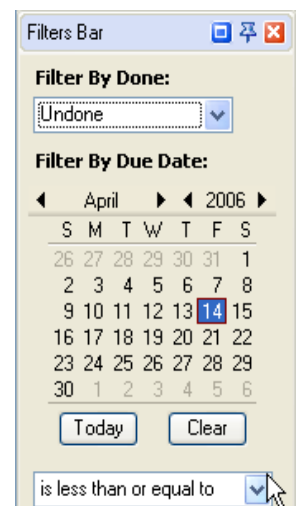
- Change tasks priority (**Tasks -> Increase/Decrease Priority** or **Increase/Decrease Priority** buttons or **SHIFT + CTRL + UP/DOWN**)



Step 6. Monitor your business activity

If you want your business plans to succeed with planned results you should monitor business process to know what you have already done, what you are doing and what you still need to do.

- Sort the tasks the way you need (**Drag and Drop** any column header on the space above the **Task Grid**)
- Calculate time spent on a task and compare it with estimated one (**Edit Task -> Actual Time** field)
- Make a list of all tasks, 'done' tasks or 'undone' tasks (**Filter Bar -> Filter By Done**)
- Filter tasks by categories (**Category Panel -> double click on a category**)
- Make a list of tasks for a certain date (**Filter Bar -> Filter By Due Date**)
- Make a task list for a certain period, ex.: last week or this month (**Filter Bar -> time period drop down list**) Change status of tasks to 'Open', 'Waiting', 'Put On Hold', 'Cancelled' or 'Ok' (**Edit Task -> Status**)
- Change percentage of tasks completion (**Edit Task -> Status** and choose or type exact % number)
- Track the time left till deadline or milestone (**Time Left** column)

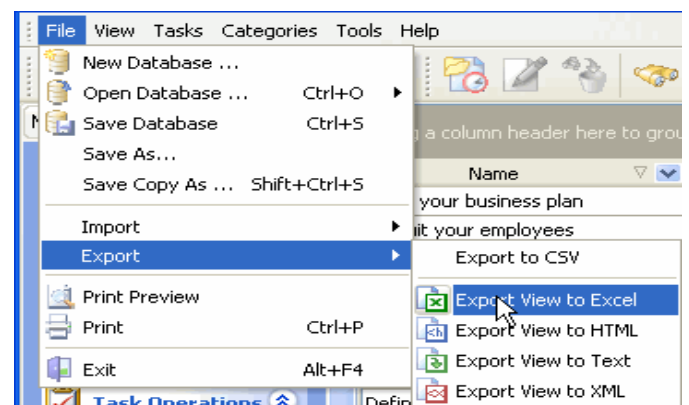


Name	Status	Complete	Time Left
Write your business plan	Open	23 %	14d 20m
Recruit your employees	Waiting	0 %	15d 26m
Motivate your employees	Created	0 %	16d 26m
Manage your cash flow	Open	4 %	7d 27m
Make sure you know what it takes	Created	0 %	6d 11m
Get your business license	Put On Hold	0 %	16d 23m
Discipline your employees	Created	0 %	-1d 23h 32m
Define your internal and external ir	Open	55 %	-1d 23h 41m

Step 7. Make your business reports

Spreadsheets allow you to see the whole picture of your business progress and make business reports.

- Present the report as MS Excel file (**File -> Export -> Export View to Excel**)
- Print the to do list spreadsheet (**File -> Print Preview**, **File -> Print** or **Print** button or **CTRL + P**)



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