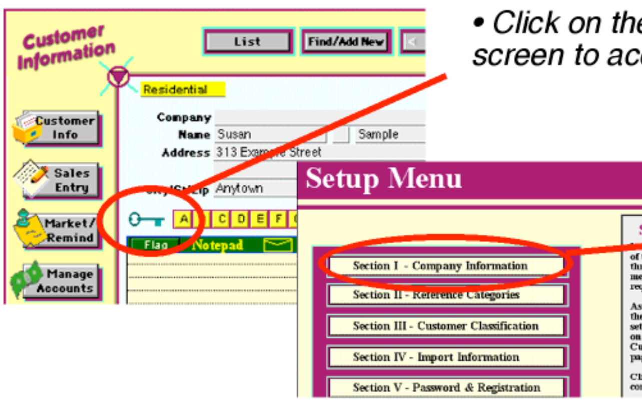
10 Steps to Getting Started With

Castlebrook Software Co.

At Your Service

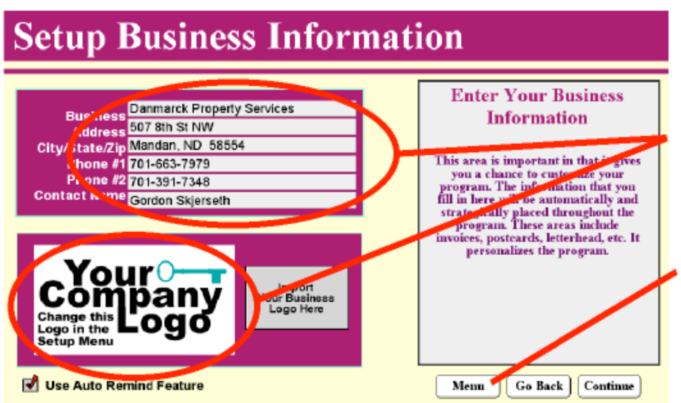
For Small Business

1 Setup



• *Click on the "Key" in the Customer Information screen to access the Setup area.*

• *Then choose "Section I - Company Information"*



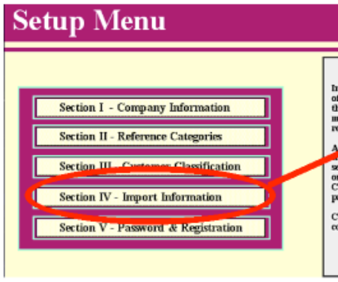
• *Enter your business information, then import a graphic of your company logo.*

• *Click "Menu" to return to the setup menu.*

• *Before moving on to other setup areas, you need to decide if you are going to enter your customer data manually (one by one) or if you will be importing customer data from an existing computer file.*

• *If you plan on entering data manually, please skip the next step and go to step 3.*

2 Importing Customer Information



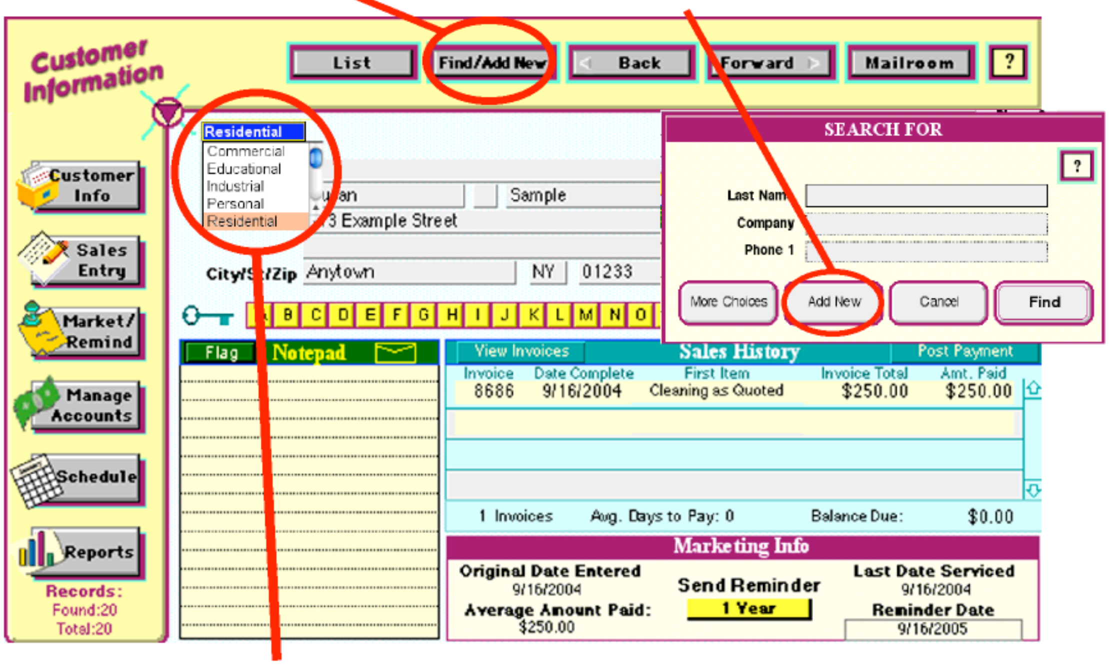
• *From the setup menu click on the "Section IV-Import information" button and follow the instructions.*

3 Manually Entering Customer Data

• *Although there are other topics in the setup area, none of them are important in getting you up and running and you can check them out later once you are more familiar with the program. For now click the "Exit Setup" button and you will be returned to the Customer Info screen.*

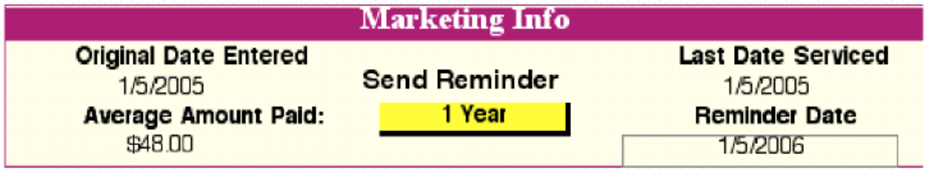
• *One of the most important buttons you will use is the "Find/Add New" button on the top of the screen. Click it now.*

• *This will bring up a "Search" window with some choices underneath. If you are not sure whether the customer you are about to enter has been previously entered, you can search for it. Otherwise click the "Add New" button.*



• *Select the category you wish to assign to your customer from the drop-down menu, then begin entering the customer information. You can use the "TAB" key to get to the next field or click in any field you want to enter. The information you enter is automatically saved as you type it in.*

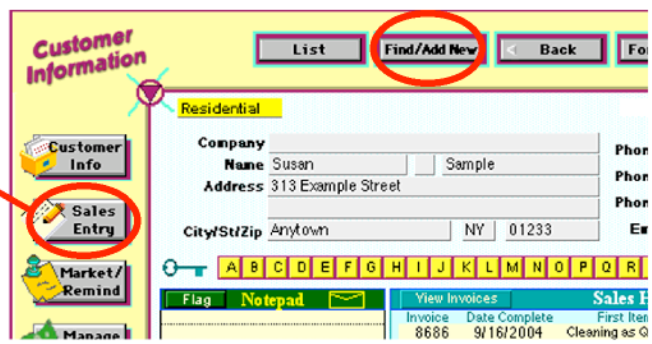
4 Setting Reminders

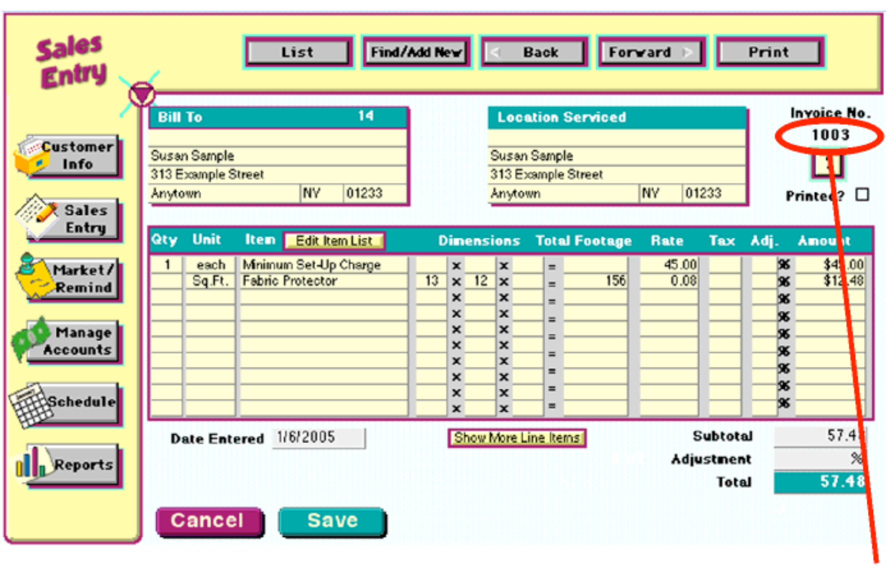


• *At the bottom of the Customer Info screen is an area called Marketing Info. Choose how often you would like to have your customer reminded of your services. Every month you will be automatically informed of which customers need to be reminded and postcards or calling lists can be generated.*

5 Invoicing a Customer

Use the "Find/AddNew" button to locate the customer. When the customer you wish to invoice is showing in the customer info screen, press the "Sales Entry" button on the left.

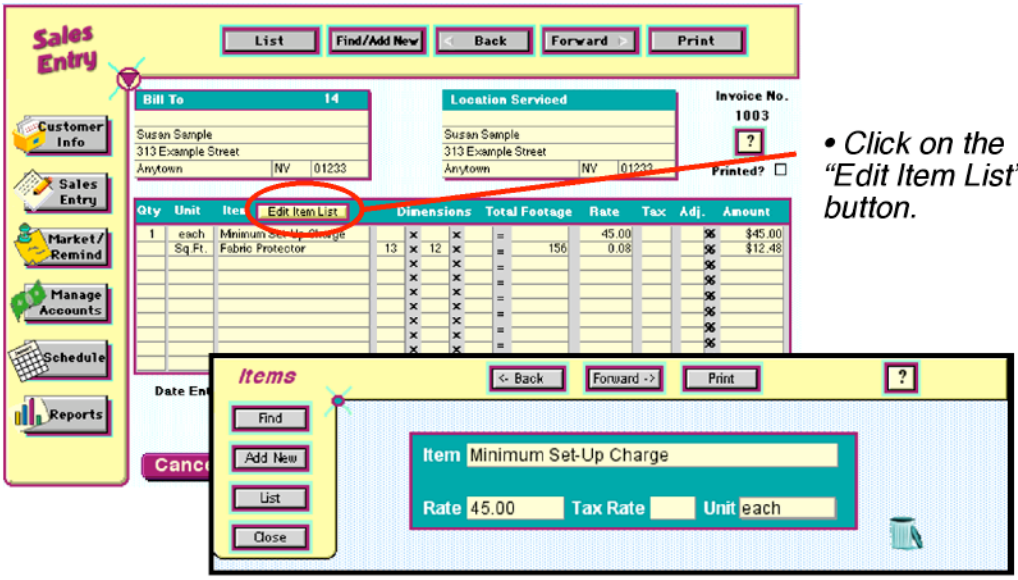




You will be brought to the Sales Entry screen where the customer information has already been entered for you, and your cursor will be in the "Invoice No." field. You can enter your own invoice number or use the one the computer has already entered, then tab to fill in the remaining information.

6 Using the Item List

Items you sell often or services you provide often can be entered into the “Item List” to save time during invoicing.



• Click on the “Edit Item List” button.

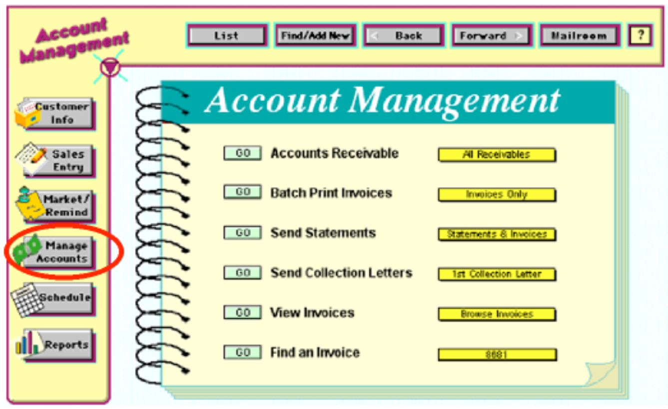
• In the ”Items” window that appears, click the “Add New” button to enter any common item or service you wish to bill. Click the “Close” button to return to the Sales Entry screen. A list of the items will appear each time you enter the “Item” field during invoicing.

7 Market/Remind

• Clicking the Market/Remind button brings you options for sending postcards, letters or contact lists for reminding existing customers or target marketing new prospects. We recommend playing around and trying the various options. If you have any questions click on the ? button for help along the way.

8 Managing Accounts

While "At Your Service for Small Business" is not an accounting program, it does allow you to keep track of your transactions and your income up to the point of deposit.

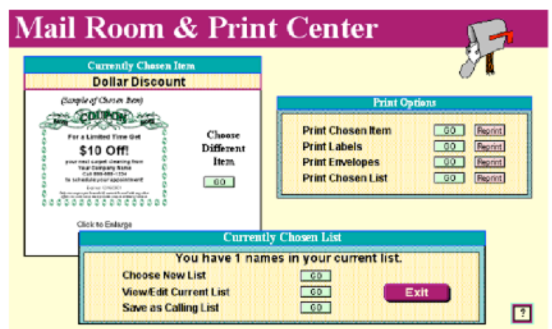


• This is where you can print monthly statements, invoices, view account aging or simply browse your invoices. This area is very self-explanatory. For more information click the ? button in the various areas.

9 Mail Room Functions

During the course of using this program, you will periodically find yourself in the Mail room.

• This is where you will print the chosen marketing items such as postcards, mailing labels, letters, etc. You will see a sample of the item you have chosen to print on the left and various print options on the right. A description of these items can be found by clicking the ? button on the lower right of the screen.



10 Registering Your Program

Once your free trial expires you will be brought to the "Password/Registration Info" screen. Contact Castlebrook Software to purchase your copy and a password will be given to you.

• Enter the password and click "Submit". If you received a password before the trail expired, you can click on the "Key" in the Customer Info screen to get to the Setup menu. Click the "Section V - Password & Registration" button.