



eazy  vb

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION
TO SCALE YOUR VIRTUAL BUSINESS

MODULE ONE

BY CRAIG COLLEY

eazy v**b**

AN ONLINE COURSE TO HELP YOU SCALE YOUR VIRTUAL BUSINESS





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Eazy VB | Ultimate Resource Guide | AN ONLINE COURSE TO HELP YOU SCALE YOUR VIRTUAL BUSINESS | Module 1
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Note on Security:

This course is a guideline of how to use 3rd party software in your virtual business and makes no claim or suggestion as to the security, privacy or protection of the data in your virtual business platform. All use of software / hardware is the responsibility of the end user and not the Eazy VB Course or instructors.



MODULE ONE

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

INTRODUCTION



INTRODUCTION

Welcome! **The Eazy VB Ultimate Resource Guide** is designed for anyone looking to enhance their tech skills and scale their virtual business platform. This guide covers the basics of scaling and transforming any business from a traditional paper-based office business to a digital, paperless and mobile virtual platform. This e-book is a reference guide based on the self-paced, step by step online Eazy VB video course. Throughout this guide, I will be referring to the course which is the next step in scaling your virtual business.

I will cover the basic software and hardware devices (*I have tested and use myself*) to scale your own virtual platform.

The information in the guide is based on years of research, trial and error and packed full of useful tips and work-arounds.

“I created this system originally for myself because of the inefficiencies of wasted time, money and materials I personally experienced by being an entrepreneur and business owner. By implementing this platform I was able to close my multiple offices, eliminate the overhead, work less and make more money from anywhere and have a better lifestyle. I know it sounds cliché but it's true. After having so many inquiries as to how I did this, I decided to create this guide and online course to share with others who were looking to do the same thing. I hope you find the Eazy VB System as beneficial as I and many others have. I wish you all the success you deserve with your career”.

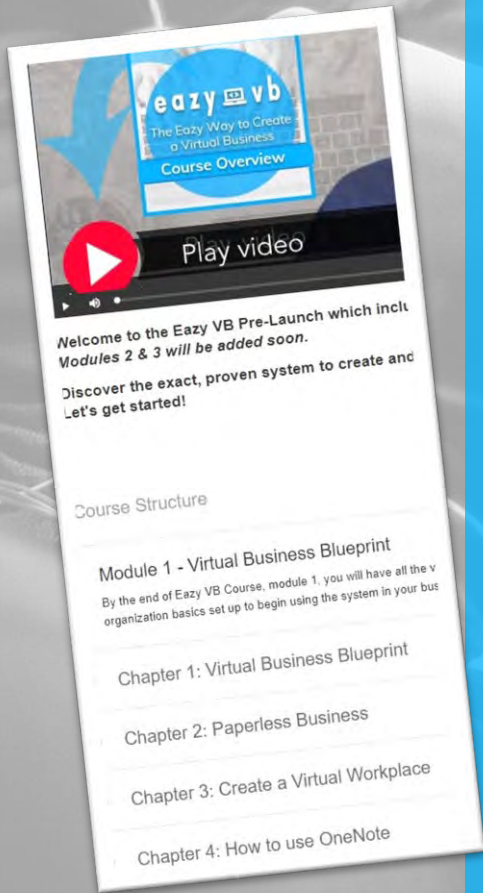
Best regards,
Craig



Craig Colley
Creator of the Eazy VB
Course & Instructor

TABLE OF CONTENTS

- 1) Overview: Module 1 / Virtual Business Blueprint ... Page 7
- 2) Software Review & Recommendations ... Page 9
- 3) Hardware Review & Recommendations ... Page 15
- 4) Setting Up Your Workplace ... Page 24
- 5) Paperless Business ... Page 27
- 6) Set Your Browser ... Page 30
- 7) OneNote Overview ... Page 34
- 8) Adobe Acrobat Pro Overview ... Page 36
- 9) Adobe Scan Overview ... Page 38
- 10) Create a Client Profile ... Page 39
- 11) Adding images. Graphics, PDFs ... Page 43
- 12) Module One Recap ... Page 46
- 13) BONUS: Access to Free Video Lessons ... Page 48



OVERVIEW MODULE ONE 1 of 2



Module 1 is the cornerstone of the entire system. The goal of this module is to enable you with the tech and tools and knowledge to master your tech skills, enhance and scale your virtual business. This guide provides an overview of the virtual business blueprint and how to build the foundation of your virtual business platform. In this module, I discuss the steps to set up the Eazy VB System to completely update your current workspace and provide the pathway to future success.

Throughout the course there are numerous "**Tips**" to make your learning experience easier and the implementation of the system in your business fast and simple.

The **Tips** also provide shortcuts and time saving work-arounds.

Starting with the next chapter, I will be reviewing the various video software tools that I use daily and recommend in this guide / course. I do this to show you exactly what the basic capabilities are, how they look to the end user and a glimpse of what you will be able to expect, create and incorporate into your workplace.



OVERVIEW MODULE ONE 2 of 2

First here's a look at what to expect from this course module.

4 Steps To Enhance Your Virtual Business:



- 1) **COURSE OVERVIEW:** The basic technology, essential tools and system to enhance your virtual business (which I will refer to as your "office" or "workplace" throughout the course). No matter what your level of tech literacy, the course is designed to be easily implemented and applied to your existing virtual business.
- 2) **SOFTWARE and HARDWARE:** The tech stuff. Review and recommendations of the software and hardware used in the Eazy VB system. *(Links & estimated costs included).*
- 3) **PAPERLESS BUSINESS:** The transition from your current office/workplace set up to a 100% paperless business by learning how to digitize and organize all paper documents, forms, files and promotion materials.
- 4) **UPDATES & TRAINING:** Updates and training to implement the hardware and learn the fundamental software to improve the functionality and productivity of your virtual business. The first step to scaling your business for increased market share and profitability.

First, we'll talk about the technology- the software and hardware you'll need to make this happen. So let's get started.



MODULE ONE

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

SOFTWARE



SOFTWARE 1 of 5

In this chapter, I provide an organized list of software and service providers for scaling your virtual workplace. This an overview for the entire course with pricing estimates and direct links to review / enroll / download. You may not need all the software on the list to build your business, but I wanted to show you your options before you get started. Only four (of which three of them are free) are needed to enhance your virtual business. *In the online course this list is frequently updated with new options.*

SOFTWARE: ('Ctrl & Click' to follow any link or allow to view)

Web Browser - Chrome - utilize Sync (auto save of logins/passwords), bookmarks (organizing bookmarks) sharing, multiple extension (Use Safari or Edge for 2nd browser)
Est. Cost: Free

[Link to Download](#)

OneNote from Microsoft - software to create, organize, capture, sync & share on all devices. Includes OneDrive cloud storage account.

Est. Cost: Free

[Link for Product](#)



SOFTWARE 2 of 5



Adobe Acrobat Pro - PDF Software - with Document Cloud storage

Est. Cost: \$15 mo. / \$180 yr.

Link for Product



Adobe Scan - Mobile (*Tablet / Smartphone*) Document / Business Card Scanning Software that works with Adobe Acrobat Pro

Est. Cost Free

Download from Apple / Microsoft App Store

Link for Product Info



Computer Backup - Carbonite Pro (HIPAA compliant/encrypted option available)

Est. Cost: Basic service \$6 Mon. / \$72 yr. | \$12 mon. / \$149 yr. (HIPAA Compliant)

Link to Service



Second phone line on your cell phone - Sideline

Est. Cost: \$99 yr.

Link for Service



Online Appointment Scheduler - Calendly

Est. Cost: \$15 mo. / \$180 yr.

Link for Service

SOFTWARE 3 of 5

Online (Screen Share) Meetings - Zoom

Est. Cost: Free (up to 40 min. meetings for multiple attendees).

[Link to Service](#)

Video Email - Bombbomb

Est. Cost: \$70 mo. / \$840 yr.

[Link for Service](#)

Email Marketing - GetResponse

Est. Cost: \$50mo. / \$600yr. (for advanced automation email replies etc.)

[Link for Service](#)

Gotfreefax - Faxing Software

[Link for Service](#)



SOFTWARE 4 of 5

Chat on Website - Drift

Est. Cost: Free (pro package available)

[Link for Service](#)

Website Services - Domain names, Email (using drafts for reference links/docs etc.) templates, signature) Wordpress Hosting, SSL, Shopping carts

Est. Cost: Email: \$6 mo. \$72 yr. | Website hosting - \$9 mo. / \$108yr.

[Link for Services](#)

Microsoft 365 - Office Suite of products; Word, Excel, PowerPoint, One Drive, One Note

Est. Cost: \$69 - 99 yr.

[Link for product](#)

Website Design for WordPress - ThriveThemes

Est. Cost: \$19 mo. / \$228 yr.

[Link for Service](#)



SOFTWARE 5 of 5

Wondershare - Video conversion, screen recording
Est. cost:

[Link to Product](#)

Monosnap - Screen capture software

[Link for Service](#)

Logitech Webcam & Video Software (Logitech Capture)

[Link for Free download](#)

TIP: Because of the number of logins and passwords you will accumulate, I suggest creating a password protected file in a program like Word (learn how to protect document in lesson to follow) of all logins, passwords, serial numbers, links to software/product source/providers. Also create a password protected PDF copy of the Word doc to share on different devices. Keep files in the same folder for easy access and updates. Save new versions periodically. Sometimes files can become corrupted. If using Adobe Acrobat Pro, store in Document Cloud

In review: We've covered the software basics, provided links of where to access, download and create accounts and provided estimated costs for budgeting purposes. Now we're going to move onto the hardware you're going to need to work in conjunction with the software.

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

HARDWARE



HARDWARE 1 of 8

In this chapter I provide a detailed and comprehensive list of hardware and product providers used in the Eazy VB system. You do not need all of these to create your virtual business. As your business and marketing needs grow you can add what your business requires.

I strive to make starting or scaling your business as affordable as possible.

Note on mobile devices used in this course: In this course I use an iPhone and an iPad Pro in all mobile examples. (Androids, other Smartphones and Surface Pro type tablets should work but not tested).

Below are the most cost-effective iPhone / iPad recommendations if you do not already have one. You do not need the latest iPhone / iPad as they tend to be expensive and not needed for your virtual business to thrive. Some older models work very well with this system and are compatible with current software updates from Apple.

TIP: I recommend a cell phone plan with unlimited data.



HARDWARE 2 of 8

Phone 6 Plus - RECOMMENDED - Affordable with large screen. (like the one used is this course). The iPhone 6+ is recommend because of its size (larger screen) and hotspot capability (*which allows you to use the phone as a mobile WiFi connection when traveling or when WiFi is not available*). Wired headsets/external microphones can be plugged into the unit.

[Link to View](#)

iPad Pro - Larger screen with pencil (like the one used is this course) (*Microsoft Surface is another option but not tested*). The iPad Pro 2nd Generation like the iPhone 6 Plus (both used in this course) is an older model. Wired headsets/external microphones can be plugged into the unit.

[Link to View](#)

TIP: Newer iPhone's / iPads have Lightning jacks only and need additional audio adapters and can not be charged at the same time. (*More in advance audio / video lessons*).

iPad Carry Case

[Link to View](#)



HARDWARE 3 of 8

Apple pencil, tip & eraser replacements

[Link to View](#)

Screenwriting glove

[Link to View](#)

Laptop - recommend larger screen

[Link to View](#)

External Hard Drive

[Link to View](#)



HARDWARE 4 of 8

Scanner - Brother (See Chapter 6 for file labeling prior to scanning).
[Link to View](#)

Printer - Brother
[Link to View](#)

USB Audio / USB Multi Hub
[Link to View](#)

Webcam - Logitech 922
[Link to View](#)

HARDWARE 5 of 8

Lavaliere mic (wired)

[Link to View](#)

IPhone adapter for iPhones with plugs (adapter will depend on model of iPhone)

[Link to View](#)

Headset with mic (USB – Wired)

[Link to View](#)

Headset with noise cancellation (covers both ears)

[Link to View](#)



HARDWARE 6 of 8

Small USB power supply
[Link to View](#)

Portable AC / USB / Laptop Charger
[Link to View](#)

Small iPhone light
[Link to View](#)

Small tripod
[Link to View](#)

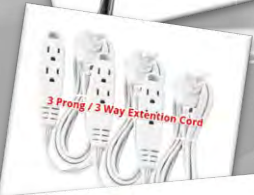


HARDWARE 7 of 8

Large tripod
[Link to View](#)



Selfie stick with light
[Link to View](#)



AC three-way extension cord. - Make sure it is 3 prong
[Link to View](#)



Lap desk - (computer tray)
[Link to View](#)



Briefcase / Padded Over the Shoulder Case
[Link to View](#)

HARDWARE 8 of 8

In Review: We've covered the software and hardware basics, provided some links of where to access and download (cost estimates on purchase pages) , create accounts and make purchases.

The choice is yours when it comes to creating your virtual workplace.



Now we're going to move on to organizing and digitizing your current documents, etc. you're going to need in conjunction with the software and hardware.



MODULE ONE

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

PAPERLESS BUSINESS SETTING UP YOUR WORKPLACE & DIGITAL FILE SYSTEM



SETTING UP YOUR WORKPLACE 1 of 2

In this chapter we will be setting up or re-organizing your workplace. This exercise is probably the least enjoyable task you will do in this entire course. It is, however, one of the most important steps to take. The success of your business will depend on how well you organize your work-space. Realistically, with an active practice you may not have the time to do this all at once. To begin, at least create all the categories you will need and start a little at a time.

BEFORE



AFTER



SETTING UP YOUR WORKPLACE 2 of 2



Three Steps: Download worksheet



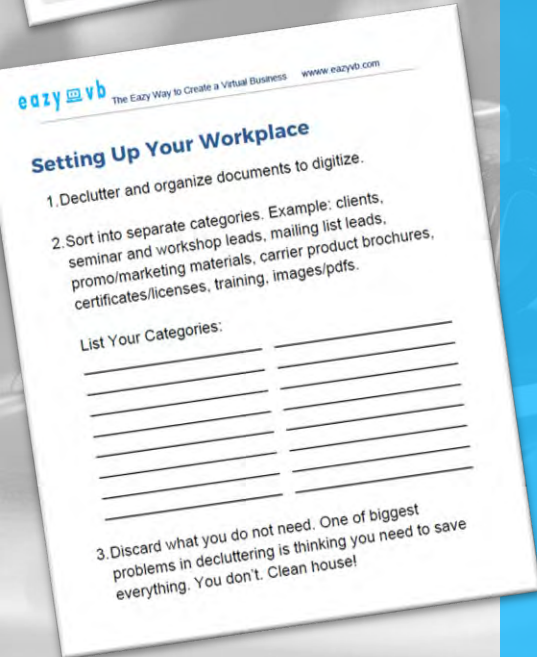
1) Declutter and organize documents digitize.

2) Begin by sorting into separate categories. Example: clients, seminar and workshop leads, mailing list leads, promo/marketing materials, carrier product brochures, certificates/licenses, training, images/pdfs.

3) Discard what you do not need. One of biggest problems in decluttering is thinking you need to save everything. You don't. Clean house!

TIP: Most companies / carriers offer PDFs of their products. No need for company brochures/application/forms / (unless requested and can be ordered) otherwise email / text all info to clients / prospects. The truth is 99% of what your carry and distribute are discarded or put in a drawer, folder or file cabinet and are never looked at again. You need to break this cycle of wasted time and materials.

In Review: After completing this task you should have gleaned your files and everything you are going to use for your business in separate marked piles ready to be scanned and digitally organized. We will address in upcoming lessons how to integrate your current folder/file system on your computer into this new system.



PAPERLESS BUSINESS 1 of 3

In this chapter we'll take a deep dive into folder / document preparation and scanning.

At this point you should have your paper files etc. organized and separated into defined categories ready to be scanned.

Next, we'll use the Eazy VB 'Digital Filing System' and create folder & filing system for where and how to save the files.



1) Folder / File layout: Download Worksheet

Folder layout (hard drive on desktop and or laptop)
Main Folder | Category | Individual File Folder | Files

2) **File name:** Develop a habit of labeling every folder and file with the same naming system.

Option 1: Name (First & Last), Category & Date
John_Doe_LI_07052020 (Month, Day & Year)

Option 2: Date, Name (First & Last) & Category
07052020_John_Doe_LI



PAPERLESS BUSINESS_{2 of 3}

SAMPLE:

My Virtual Business (Hard Drive) | Clients - Prospects (Category) |
John_Doe_LI_07052020 (Folder) | John_Doe_LI_07052020 generic Info (File)

TIP: Mirror folder / file names in your cloud storage, email and bookmarks.

TIP: Create acronyms for easy labeling and file retrieving

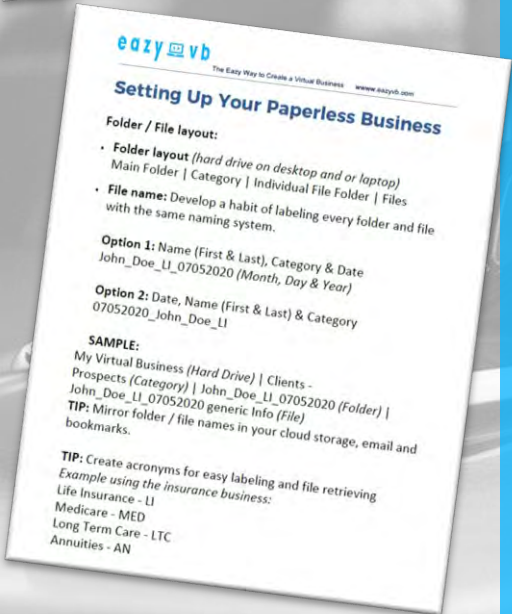
Example using the insurance business:

Life Insurance - LI

Medicare - MED

Long Term Care - LTC

Annuities - AN





PAPERLESS BUSINESS^{3 of 3}

5 Steps to Implement your Digital Filing System:

1) Create an organized folder/file set up on an external or internal hard drive.

TIP: All hard drives should be backed up as mentioned in the software review chapter. **Link to Service** (Carbonite) **TIP:** Create shortcuts to common files on PC (quick access) or Mac (favorites).

2) Scan and label all documents etc. with suggested Digital File System (above) or one of your choosing. Either way the system needs to be easy to duplicate and simple to search/find data/documents.

3) If you have important notes on paper pads, journals, scrap or post it notes, scan and label those as well.

4) Depending on your scanner, many can scan business cards and automatically extract the data into a software program.

5) Organize PDF product brochures, forms, reports, charts, marketing pieces, mailers, flyers etc. the same way. Companies and carriers usually provide product materials and forms on their website or in your agent/private portal.

In Review: Now you have your folders and files ready to implement into your new system





MODULE ONE

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

SET UP YOUR BROWSER

SET UP YOUR BROWSER 1 of 2



Now we're ready to start building the framework for your workplace. At this point you should have the basic hardware (purchased if necessary) set up and ready to use (computer/tablet/smartphone).

We are going to begin filling in the pieces of this virtual puzzle by downloading and installing the 4 basic software's to your computer/devices.

We'll start with **Chrome by Google**. *(You can use other browsers, but they will not be covered or referenced in this course).*

1) First access or create your own Google account. This is required for Chrome and necessary for the SYNC function to work.

[Access Link](#)

2) Download Chrome. [DOWNLOAD LINK](#) by Google and works on a Mac and/or PC. By using the sync feature all history, bookmarks, login and passwords can be safely saved and shared on any device including your tablet and cell phone. The security and sharing capability provides a reliable safe and secure online experience. ***For a tablet or iPhone, download the Google Chrome app from the App Store.***

3) Configure Chrome with sync functions, start up tabs, bookmarks, cache and cookies.



SET UP YOUR BROWSER 2 of 2

TIP: What are Cookies? Cookies are created when you visit a website. They are used to store bits of information about your interactions with the website, which the web server can use later when processing your sessions. ... To be technical, your browser is the program that mediates cookie control between your computer and the website.

In Review: Congratulations! Most of the heavy lifting is over. Now that Chrome is installed as your web browser, we are finally ready to download the basic software and build your system.





MODULE ONE

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

COURSE BASICS / SOFTWARE OVERVIEW



ONENOTE OVERVIEW 1 of 2

OneNote is the foundation of the virtual business system. You maybe already using another software which is fine if it provides the same functionality as OneNote.

OneNote can be used to create reports, handwritten printed letters, convenient and ongoing handwritten notepads, business lines, vendor, client sections and pages, among many other uses.

I suggest you click the link and download this free software to have a look.

[Link to Download OneNote \(for computer\)](#)

Go to the app store on your tablet or smartphone to download the App.

TIP: Some functions work better on laptop (text, folder arrangement, tables, printing) and some functions work better on iPad (writing, drawing and resizing).

In the Online Course I cover the set up, shortcuts, tips and tricks, troubleshooting, how to create and organize notebooks, sections, pages and use search functions.





ONENOTE OVERVIEW 2 of 2

OneNote Overview. There 7 keys areas: *(Covered in detail in the online course).*

- 1) **Menus:** Home, Insert, Draw, View & Help: (text, tools, tabs, draw, pen, color, size, create new pens, audio, tables, insert PDF, copy/paste text from another document or website/URL).
- 2) **Notebook:** section, pages (create, copy, move, delete), open / close notebooks
- 3) **Home:** Works like a word document. (No drawing capability)
- 4) **Insert:** Table, Pictures, Camera, File, PDF
- 5) **Draw:** Text; Select placement on page and enter text. (Setting default from home page)
- 6) **Draw:** pen, color, size, create new pens
- 7) **View:** (Section, copy / move / delete (create templates)



ADOBE ACROBAT PRO OVERVIEW 1 of 2



Acrobat Pro is an advanced PDF software. The desktop / laptop (computer) and tablet versions vary in their functionality and are covered in separate lessons in the online course.

Acrobat Pro has an abundance of features making it the default “go to” program I recommend and use in this system.

This software has annual subscription and runs about \$15.00 a month.

[LINK TO SUBSCRIBE](#) Select Acrobat Pro and install.

In the online course I focus on the most common and useful features for use in your business.

TIP: Personally, I use Adobe's Creative Suite which includes all their products (Photoshop, Acrobat, Premier etc.) **[LINK TO SUBSCRIBE](#)** for Creative Suite - select "All Apps"). This is for advanced users and isn't necessary for this course or your business when starting out.

With an annual subscription or an Adobe Acrobat Pro subscription this product is coupled with Document Cloud storage. The stored files are also accessible between your computer, tablet and smartphone. All files are accessible on both Mac & PC.



ADOBE ACROBAT PRO OVERVIEW 2 of 2

Your computer will be used primarily when working with most PDFs. Your tablet will be used more for sharing, entering handwritten data and presentations.

TIP: I share in the online course several shortcuts and techniques I've developed when working with paper forms and signatures using this program.

Adobe Acrobat Pro, along with OneNote are the two main programs used in this system.



ADOBE SCAN OVERVIEW

The free Adobe Scan mobile app works on your mobile device, scans documents into PDFs and automatically recognizes text. With Adobe Scan you can easily capture and convert documents, forms, business cards, and whiteboards into high-quality Adobe PDFs. And with different capture modes, you can ensure that you capture the clearest scan every time. This an excellent option to use when traveling or meeting with clients to capture necessary information.

TIP: You will need to access the Apple App Store and download the app. You will need an apple account (login and password to do so).

Basic scanning:

Open app

- 1) Select whiteboard, Form, Document or Business Card
- 2) Icon Options, Add photo, Auto-Capture (On/Off), Flash (Auto On/Off), File Save.
- 3) Click File Save bottom right corner, crop or retake> Continue
- 4) Name file (default) "Scan & Date" > click pen to change
- 5) File saved to Scan folder in Document Cloud
- 6) Option to Share, Open in Acrobat, Comment, ... More

TIP: Business card scans can be added to contact list automatically on iPhone.

[LINK TO ADOBE HELP PAGES](#)





MODULE ONE

ULTIMATE RESOURCE GUIDE

SOFTWARE / HARDWARE / ORGANIZATION TO SCALE YOUR VIRTUAL BUSINESS

SET UP A PROSPECT / CLIENT PROFILE

CREATE A PROSPECT / CLIENT PROFILE¹ of 3

In this chapter I illustrate an overview of how the Eazy VB system works. This chapter lists the steps covered in detail in the online course. For the sake of productivity, this is more than an exercise. Be sure to use an actual prospect / client so the result is not just a simulation. This will serve as a first profile and a template for all future activities / entries in your virtual office / workplace.

DOWNLOAD WORKSHEET



1) Gather information

Create a folder on your **main hard drive** (desktop/laptop) in the appropriate **category**. In this example I will use a life insurance prospect.

Suggested FOLDER label:
Example: "Client - Prospects"

You can select any category that works for you.

The system works the same for every type of prospect / client.

2) Create Client MASTER Folder

This will be the **Master Folder** for this this client/prospect and will contain all information; images, documents, illustrations, pdf's etc.

Example: "John_Doe_LI_07052020"



CREATE A PROSPECT / CLIENT PROFILE 2 of 3

3) Open Acrobat

Create Folder in Document Cloud

(example: "Client - Prospects")

Create Client **SUB Folder** (Name it the same as what is on the hard drive)

"John_Doe_LI_07052020"

4) Open OneNote

Create a **Notebook**> name it "My Virtual Business"

Create a **Section**> name it "Client - Prospects"

Create a **Page**> tap the text tool and enter "Name"

Enter descriptive info (with abbreviations / acronyms).

By default, the Draw tab is automatically selected.

Example: "John_Doe _A56_ LI_T_400k_30yr_St_NT"

Sample Acronyms:

A- Age

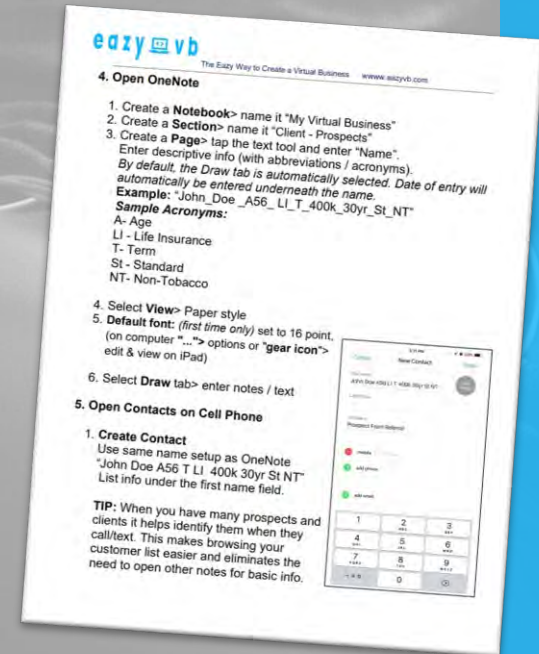
LI- Life Insurance

T- Term

St- Standard

NT- Non-Tobacco

The date of entry will automatically be entered underneath the name.





CREATE A PROSPECT / CLIENT PROFILE^{1 of 3}

Select **View**> Rule Lines / Paper Style (iPad)

Default font: (*first time only*) set to 16 point,
(on computer "...> options or "gear icon"> edit & view on iPad)

Select **Draw** tab> enter notes / text

5) Open **Contacts** on Cell Phone (See Worksheet)

Create Contact

Use same name setup as OneNote

"John Doe A56 LI T 400k 30yr St NT"

List info under the first name field.

TIP: When you have many prospects and clients it helps identify them when they call/text. This makes browsing your customer list easier and eliminates the need to open other notes for basic info.

That's it! Congratulations you've created your first contact



ADDING IMAGES, PDFS & URL LINKS 1 of 3

This is an overview of adding Images, PDFs & URL links to OneNote and Adobe Document Cloud.

DOWNLOAD WORKSHEET



Regarding Images:

Images (jpegs, pings, gifs etc.) can be **saved as PDFs**.

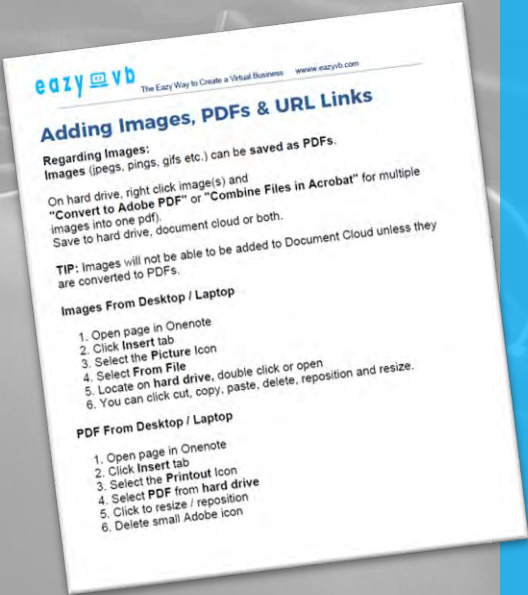
On hard drive, right click image(s) and

"Convert to Adobe PDF" or **"Combine Files in Acrobat"** for multiple images into one pdf. Save to hard drive, document cloud or both.

TIP: Images will not be able to be added to Document Cloud unless they are converted to PDFs.

Images From Desktop / Laptop

- 1) Open page in OneNote
- 2) Click **Insert** tab
- 3) Select the **Picture** Icon
- 4) Select **From File**
- 5) Locate on **hard drive**, double click or open
- 6) You can click cut, copy, paste, delete, reposition and resize.



ADDING IMAGES, PDFS & URL LINKS 2 of 3

PDF From Desktop / Laptop

- Open page in OneNote
- Click **Insert** tab
- Select the **Printout** Icon
- Select **PDF** from **hard drive**
- Click to resize / reposition
- Delete small Adobe icon

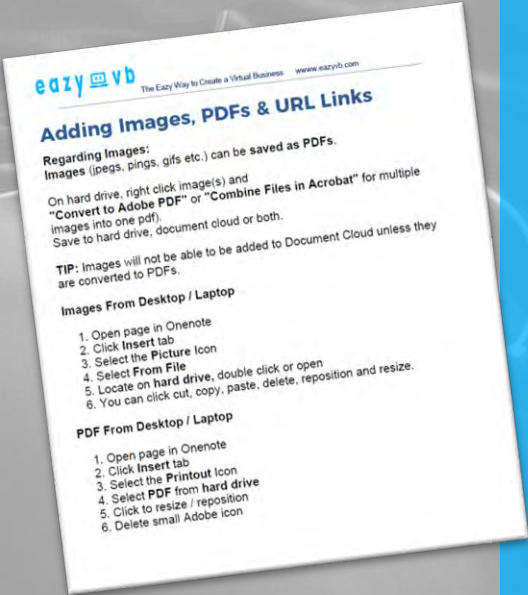
From iPad

If a page was created and edited previously on your desktop/laptop it will be ready to open on your iPad/tablet without the need of the following steps and vice versa.

Load PDFs to Document Cloud

Since an iPad does not have direct access to external hard drive, one solution is to converting images to a pdf.

- 1) **In Acrobat:** Open PDF from hard drive
- 2) **"Save As"** to appropriate **Category** folder in **Document Cloud**



ADDING IMAGES, PDFS & URL LINKS 2 of 3

On iPad> Open OneNote

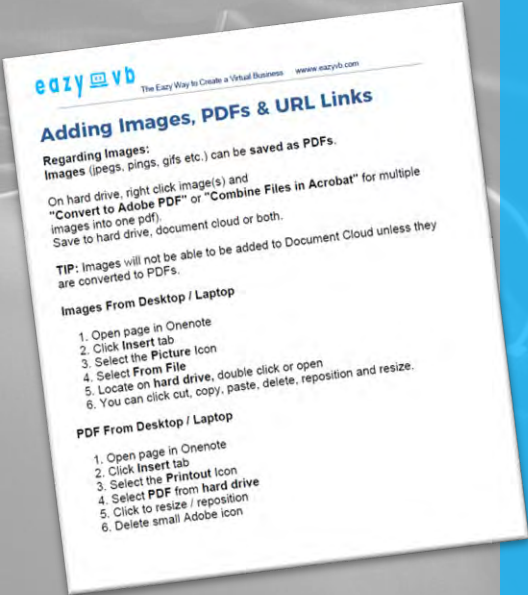
- 1) **Select** page
- 2) Select **Insert** tab
- 3) Choose **location on page** (where you want to insert PDF)
- 4) **Press and release**
- 5) Select the **Picture / PDF** Icon
- 6) **Window** pop up **box opens**
- 7) **Select** folder and file
- 8) Click to **resize / reposition**. Files are commonly placed at the bottom of your page. You can click cut, copy, paste, delete or hold ("x" in middle of the page) and move to reposition and resize if needed.
- 9) Delete small Adobe icon

TIP: Once images / PDFs are inserted into a page, OneNote makes a copy that is embedded into the page.

Links and Content from Website Page & URL Address

- 1) **Select content** from **web page** (drag and copy)
- 2) **Select Text** icon in **Draw** tab
- 3) **Select location** (click and release) Info with copy into page

TIP: The URL (website site address) will be automatically added at bottom of copy on desktop only.





RECAP OF MODULE 1

OVERVIEW

You have completed the overview of Module One.

The Tech & Tools provided in this guide and online course system will enable you to begin using your virtual business in your daily practice.

The Modules to follow (available in the online course) will help you add additional software / hardware and advanced marketing techniques to your business.

The Online course videos explain in detail, with a series of lessons to help you advance your tech skills and quickly set up and continue to scale your virtual business.



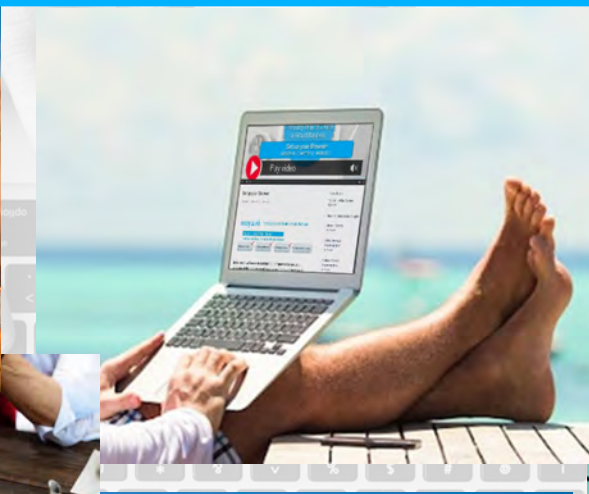
IN REVIEW WE HAVE COVERED:

- 1) Organizing Workspace
- 2) Software and Hardware
- 3) Decluttering / Scanning
- 4) OneNote
- 5) Acrobat
- 6) Adobe Scan
- 7) Creating a prospect / client profile
- 8) Adding images, PDFs & URL links



[Click to Watch a
3 Minute
Online Course
Overview](#)

NOW TO SCALE YOUR VIRTUAL BUSINESS



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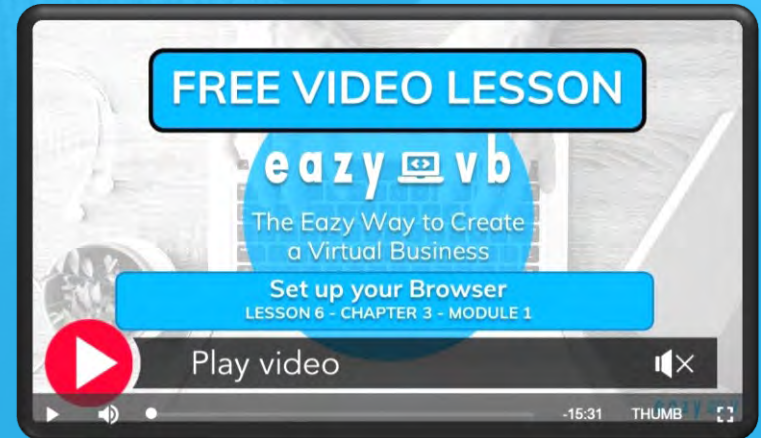
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