

# Getting Started Guide

A simple step-by-step guide to managing your Offshore Library account  
Learn how to add, edit and update all of your company, product and service information



## Introduction

The aim of this guide is to assist you with becoming familiar with all of the features and options associated with your Offshore Library account.

The guide is formatted and displayed in a logical sequence, meaning that you should start at step 1 way and work your way through to the end. After completing all of the necessary steps, you will be able to add, edit and update all of your company, product and service related information.

After completion, you should also have a better understanding of the other marketing, networking and communications options available within your account.

If at any time you get stuck or you need assistance, please contact the support team at [support@offshore-library.com](mailto:support@offshore-library.com)

On the next page you will see the table of contents. We highly recommend that you work your way through each step to gain the maximum benefit from this guide and your Offshore Library account. In fact you may find it useful to have a copy of this guide close at hand whilst you are becoming familiar with the account settings and options.

Good luck, and welcome to Offshore Library.

## Getting Started Guide

**Step 1** - How to login

**Step 2** - 'My Account Details' screen.

**Step 3** - How to add, edit and update your 'Company Profile'.

**Step 4** - How to add, edit and update your 'Products or Service' information.

**Step 5** - How to post your company, product or service news & announcements

**Step 6** - How to submit articles or white papers to the 'Knowledge Base'

**Step 7** - How to add and manage your documents (presentations, profiles and factsheets)

**Step 8** - How to access your web statistics (how many times your pages have been seen)

**Step 9** - Further support and educational guides

Next Guide = 'Maximize your ROI' – How to leverage all of your Offshore Library account options.

## How to login

After you have received your username & password, the first task is to log in as shown below.

The screenshot shows the Offshore Library website interface. At the top, the logo and navigation links (Home, About Us, Contact Us, Register, Login Now, My Cart) are visible. On the left, a vertical menu lists categories like HOME, REGISTER FOR FREE!, LOGIN NOW, WHAT IS OFFSHORE?, KNOWLEDGE BASE, OFFSHORE NEWS, and JURISDICTION GUIDE. Below the menu is a login form with fields for Username and Password, a 'Remember me' checkbox, and a 'LOGIN' button. A yellow arrow points to the Username field. The main content area features a large banner for a 'FREE & Independent offshore database for: Business, Banking and Financial Services'. To the right of the banner is a section titled 'What is Offshore Library?' with a description and a list of services: Offshore Hedge Funds, Offshore Mutual Funds, Offshore Banks, Offshore Life Companies, Offshore Advisors, and Offshore Service Providers. Below this is a grid of eight service categories: Offshore Hedge AND MUTUAL FUNDS, Offshore Banks AND SAVINGS, Offshore SERVICE Providers, Offshore INVESTMENT Advisors, Offshore Life COMPANIES, Offshore FUND MANAGERS, Offshore JURISDICTION Guide, and Offshore News AND COMMENTARIES. At the bottom, there are sections for 'Recent News' and 'Recent Articles & White Papers'.

Type in your username and password in the boxes indicated by the yellow arrow.

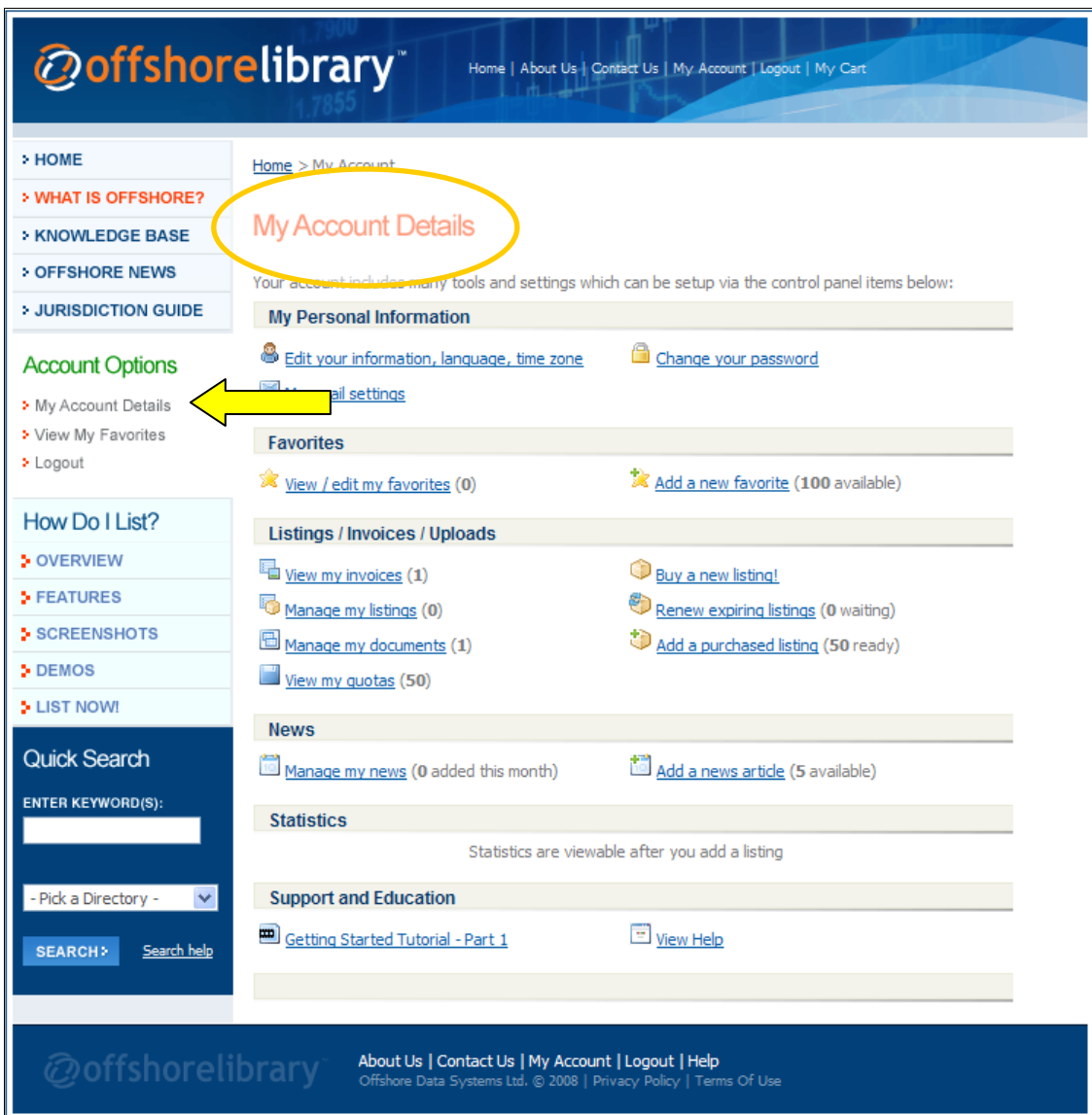
Note:

After you click 'Login' you will automatically be taken to the 'My Account Details' screen.

## 'My Account Details' screen

Below is a screenshot of the 'My Account Details' screen. This is the main page for adding, editing and updating all of your company, product and service information.

In addition, the 'My Account Details' screen is also where you will find all of the other Offshore Library account related features and options, as explained in more detail throughout this guide.



Click the link by the yellow arrow, if you ever need to return to the 'My Account Details' page.

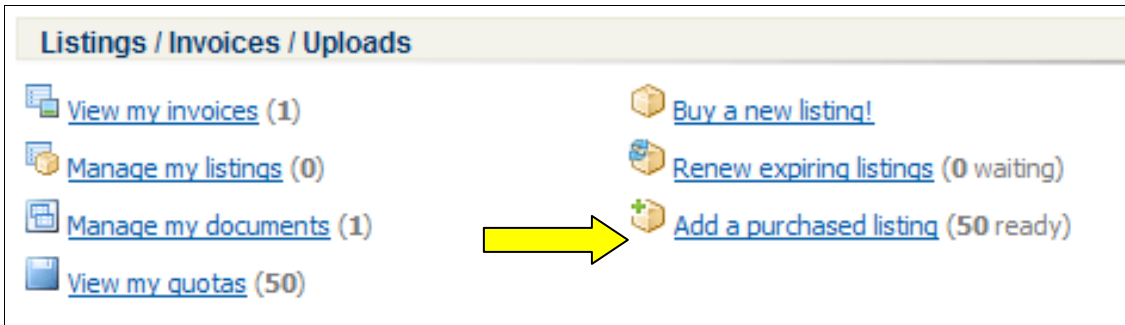
Note:

The '**Account Options**' box shown above is only displayed after you have logged in.

In the next section, we will zoom in and focus more on the functions found within the 'My Account Details' page.

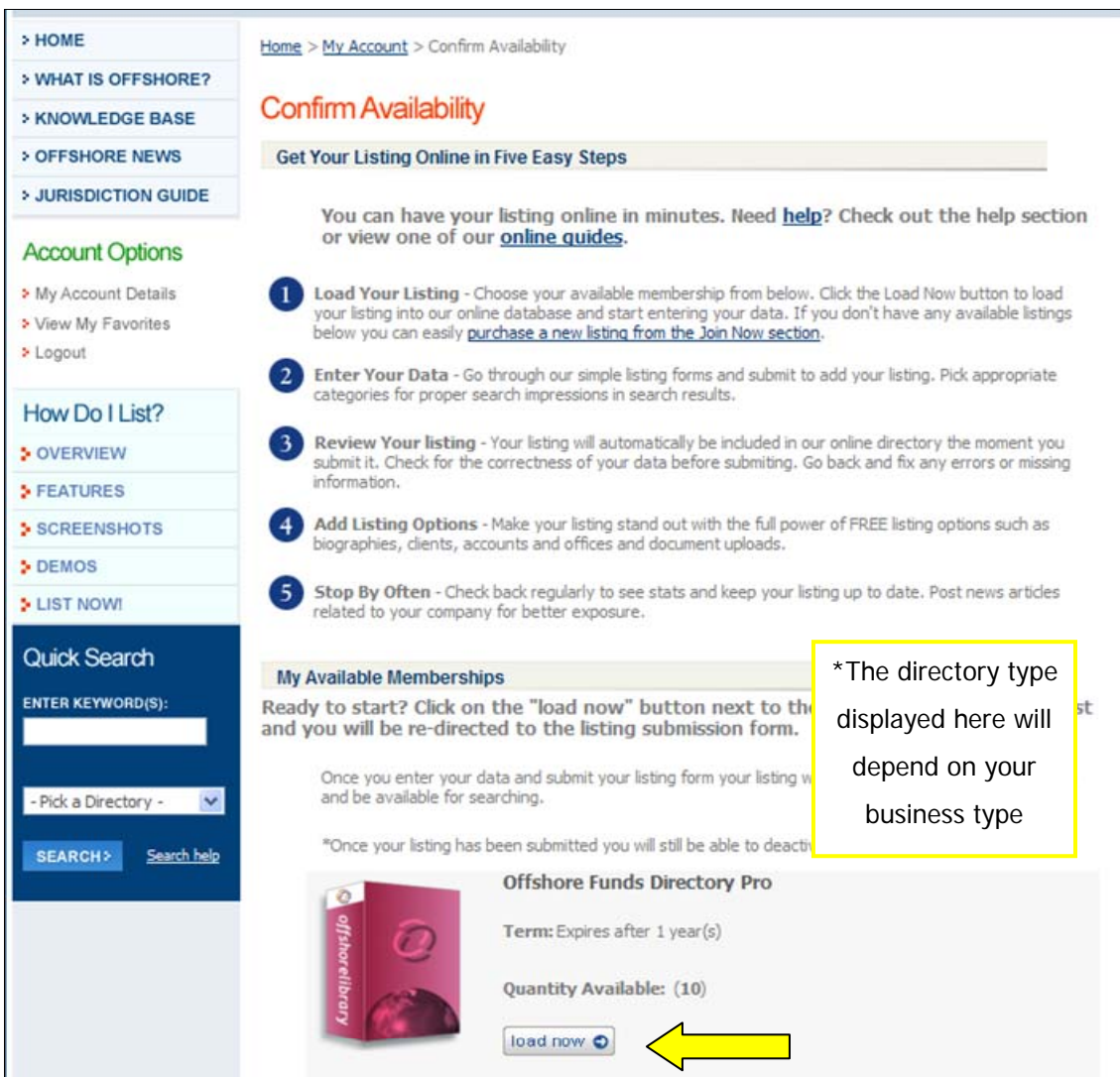
## How to add, edit and update your 'Company Profile'

Below is the 'Listings / Invoices / Uploads' section of your 'My Account Details' page.



The first time you view this section, it should state (1 ready) next to the 'Add a purchased listing' link.

Click on the 'Add a purchased listing' link and it will take you to the following page:



Click the 'load now' link to start entering your listing into the database.

After clicking the 'load now' link, you should be redirected to a blank company profile page as shown below:

[Home](#) > [My Account](#) > [Manage My Listings](#) > [Edit Fund Manager Details](#)

## Edit Fund Manager Details

\*These fields are required


\*The business type and information displayed within the company profile form will vary depending on which directory your business belongs to

[Collapse All](#) | [Expand All](#)

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### General Information


Firm Name: \*

Date of Establishment: \*   (yyyy/mm/dd)

Phone: \*  Fax:

State / Province:  Zip / Postal Code:

City:

Country: \*  

Street Address Line 1:

Street Address Line 2:

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### Developing your B2B Sales & Distribution Channels

Check for Yes: 

We welcome inquiries from interested Advisors, 3rd Party Marketers, Introducers & Distributors who would like to discuss; advising, selling, introducing or distributing our products and services. In return we are open to discuss 'Terms of Business' in the form of fee sharing or other incentive arrangements.

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### Statistics

Funds Managed:  Employees:

AUM (USD):


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### Company Profile

Short Profile:

250 characters left

Full Profile: \* 



Please complete the form with your business contact and profile information.

Bottom half of the company profile page.

### Contact Details

Website URL:

Contact Person: \*  Primary Email: \*


Secondary Email:

### Company Logo

NOTE: Images that are larger than the specified dimension limits will be automatically resized to the appropriate width and/or height.

Upload a New Logo:

(Limits: 240 wide x 100 high, 250 kb, .jpg, .gif, .png)



Delete Current Logo

### Fund Types Offered

NOTE: Please select relevant products, services and/or categories to display your business under. These will directly affect how your listing is categorized and where it appears in search results.

Pick up to 7: \* Available Fund Types Offered

Commodity Funds	>> <<	
Hedge Fund of Funds		
Hedge Funds		
Mutual Funds		
Other		

Picked Fund Types Offered

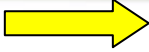
### Attach a Document OR URL

NOTE: Specifying a URL or uploading a new document will replace any currently attached document. This will have no effect on your list of uploaded documents. If you wish to edit or delete your uploaded documents go to the [Manage My Documents](#) section of your account control panel.

[Close] Choose an existing document or enter a URL    [Open] Upload a New Document

Choose:

OR Enter URL:



Once complete, please ensure that all of the fields marked with a \* (red asterisk) have been completed. If you are satisfied with your entries, please click the Save button.

Note: You can return to this profile form at anytime if you wish to edit or update the contents.

After clicking 'Save' you should receive the 'Your listing was saved successfully' confirmation.

## Edit Fund Manager Details



Your listing was saved successfully

If you would like to view your displayed profile, return to the home page and click on the relevant database icon to view your profile:

Home | About Us | Contact Us | My Account | Logout | My Cart

Account Options

- My Account Details
- View My Favorites
- Logout

How Do I List?

- OVERVIEW
- FEATURES
- SCREENSHOTS
- DEMOS
- LIST NOW!

What is Offshore Library?

Offshore Library is for individuals or businesses that have an active interest in Offshore Business, Banking & Financial Services. Offshore Library offers FREE access to Jurisdiction Guides, News and in-depth offshore related articles via the Knowledge Base. After registering you'll also gain access to the following directories:

- Offshore Hedge Funds
- Offshore Mutual Funds
- Offshore Banks
- Offshore Life Companies
- Offshore Advisors
- Offshore Service Providers

You can list your business by starting [here](#)

Recent News

- Despite Bad Quarter, Bunge Stands Firm

Recent Articles & White Papers

- What is Offshore?

If you need to edit or update your company profile, please click the 'Manage my listings' link. This is one of the links within your main 'My Account Details' page.

Listings / Invoices / Uploads

- View my invoices (1)
- Manage my listings (0)
- Manage my documents (1)
- View my quotas (50)
- Buy a new listing!
- Renew expiring listings (0 waiting)
- Add a purchased listing (50 ready)

After clicking the 'Manage my Listings' link, you will see your main listing control panel.

Home > My Account > Manage My Listings

## My Listings

My Active and Expired Listings - Ordered by expiry date

Title	Stats	Status	Membership	Expires	Tools
<a href="#">ABC Corporation Ltd</a>			Offshore Funds Directory Pro	11-28-2009	

Click on your company name or the edit icon within the tools section, to access the company profile form.

After you have made any alterations, please remember to resave the form. Changes are propagated to the database within seconds so you will be able to see any changes in your displayed profile right away.

## How to add, edit and update your 'Products or Service' options information

In order to add, edit and update your products or services options information, you need to go to your main listing control panel.

[Home](#) > [My Account](#) > Manage My Listings

### My Listings

**My Active and Expired Listings - Ordered by expiry date**

Title	Stats	Status	Membership	Expires	Tools
<a href="#">ABC Corporation Ltd</a>			Offshore Funds Directory Pro	11-28-2009	

Tip: If you place your cursor over any tool icon, a pop up description will appear.

Within the main listing control panel you have a number of icons within the tools section.

### Generic Icon description (applicable to all business listings)

- Click this icon to edit your company profile
- Click this icon to deactivate your listing. Your listing is not deleted; it is simply no longer displayed within the site.
- Click on this icon to reactivate your listing at anytime
- Click this icon if you want to post any news or company announcements directly related to this listing

### Business specific icons (each option will be covered separately in other business specific guides)

#### Fund Mangers

- Click this icon to add a fund to your company listing
- Click this icon to add a fund managers/analysts' biography and profile picture

#### Offshore Banks

- Click this link to add a term/deposit account

#### Offshore Life Companies

- Click this icon to add a product or service


#### Offshore Business & Financial Service Provider

- Click this icon to add details of a featured client

#### Offshore Advisors

- Click this icon to add additional branch office details

## How to post your company, product or service news & announcements

From within your main listing control panel click on the  icon if you want to post a news or company announcements. After clicking the icon you will be redirected to the following page.

### Edit News Article

\* These fields are required

#### News Article Details


Title: \*

News Category: \*

Attach to Listing: \* **ABC Corpoation Ltd**

#### News Article Options

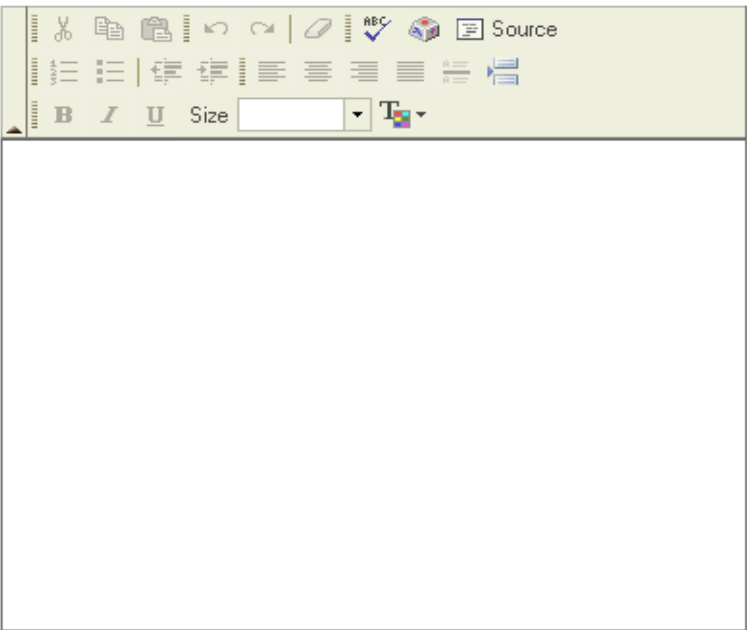
Author:

Expiry Date:   (yyyy/mm/dd)

#### News Article Body

Lead In / Summary:

500 characters left

Full Article: \* 

10000 characters left

After you have entered all of your information, click the save button to save and post your news or announcement. You can view your posted news or announcement by visiting the news section on the Offshore Library homepage.

If you wish to edit your news or announcement, go the 'News' section of your 'My Account Details' page. News articles cannot be deleted once posted, but can be de-listed if you no longer wish to display this information.

**My Account Details**

Your account includes many tools and settings which can be setup via the control panel items below:

- My Personal Information**
  - [Edit your information, language, time zone](#)
  - [Change your password](#)
  - [My email settings](#)
- Favorites**
  - [View / edit my favorites \(2\)](#)
  - [Add a new favorite \(98 available\)](#)
- Listings / Invoices / Uploads**
  - [View my invoices \(2\)](#)
  - [Buy a new listing!](#)
  - [Manage my listings \(9\)](#)
  - [Renew expiring listings \(0 waiting\)](#)
  - [Manage my documents \(0\)](#)
  - [Add a purchased listing \(41 ready\)](#)
  - [View my quotas \(50\)](#)
- News**
  - [Manage my news \(2 added this month\)](#)
  - [Add a news article \(3 available\)](#)
- Statistics**
  - [View my statistics](#)
  - [Download statistics](#)
- Support and Education**
  - [Getting Started Tutorial - Part 1](#)
  - [View Help](#)

You will see that you have 2 options within the 'News' section of your 'My Account Details' page. You can manage and edit your news, and you can also add news or announcements from here as well as from within your my listing control panel.

If you click on the options, you will see that it is simple and straightforward to post, manage and edit all of your news and announcements.

## How to submit articles or white papers to the 'Knowledge Base'




Take advantage of the free 'PR & Marketing' exposure associated with sponsoring and submitting articles or white papers, in addition benefit from demonstrating and sharing your industry knowledge and experience (credibility). Please visit the 'Knowledge Base' for further details.

*(The Knowledge Base is accessible via the left-hand side navigation bar on the homepage)*

### Knowledge Base

The Offshore Library Knowledge Base is designed to provide all members of our online community with educational information about the offshore industry and products. Here, community members who are new to the offshore industry can find useful information and answers to some common questions. As well, our articles section will enable even seasoned industry professionals to get current information regarding issues and industry trends.

#### Where to go next?

ARTICLES & WHITE PAPERS	OFFSHORE GLOSSARY	INVESTMENT STATISTICS
		

### FREE Marketing and PR opportunity

#### Become a contributor to the Knowledge Base!

Sponsor & submit an Article or White Paper to be added to the offshore Library Knowledge Base.

#### Got something to say or share?

If you have knowledge & experience relating to any of the topics within the Articles & White Papers section of the Knowledge Base, please submit your article (Word or PDF file) by emailing it to: [knowledgebase@offshore-library.com](mailto:knowledgebase@offshore-library.com)

\*Please state which category you would like the article to be posted within and include your contact details to be displayed within the article. Your company logo (jpeg format) can also be included within your article.

If your article is accepted, it will be posted within the most relevant section of the knowledge base within a few days after receipt. From then, 1000's of members and site visitors will have access to your information and company contact details.

#### Articles by Title

[0-9](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)  
[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#)  
[U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

#### Articles by Category

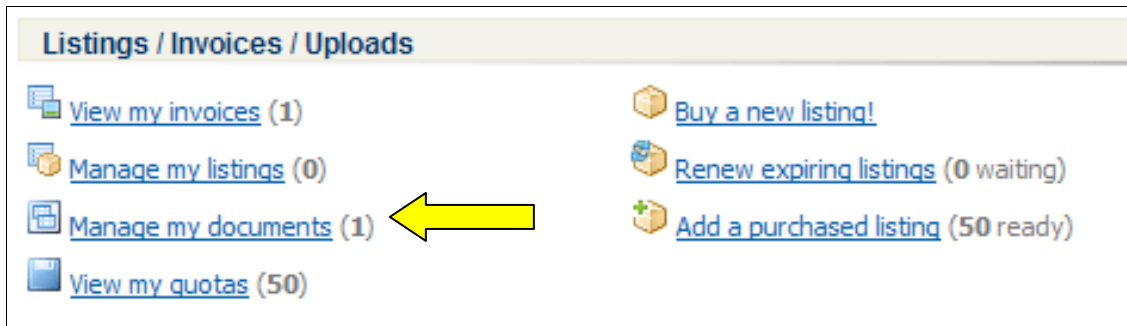
- [Hedge Fund Services](#) (0)
- [Miscellaneous](#) (4)
- [Offshore Advice & Financial Planning](#) (1)
- [Offshore Banks & Banking Services](#) (1)
- [Offshore Business Rules & Financial Regulation](#) (0)
- [Offshore Company Formation & Incorporation](#) (0)
- [Offshore Financial & Business Support Services](#) (0)
- [Offshore Hedge Funds](#) (2)
- [Offshore Jurisdictions](#) (0)
- [Offshore Legal & Law](#) (0)
- [Offshore Life & Non-Life Insurance Services](#) (0)
- [Offshore Mutual Funds](#) (1)
- [Offshore Property & Land](#) (0)
- [Offshore Tax & Estate Planning](#) (0)
- [Offshore Trusts & Trust Law](#) (0)
- [Structured & Principal Protected Products](#) (0)
- [What is Offshore](#) (1)

To submit a (free) article or white paper covering any of the above topics, please submit to [knowledgebase@offshore-library.com](mailto:knowledgebase@offshore-library.com) if approved, your article will be displayed within 48 hours.

**How to add and manage your documents** (Presentations, profiles and fact sheets)

If you wish to add or manage your documents posted within Offshore Library, you have the following 2 options:

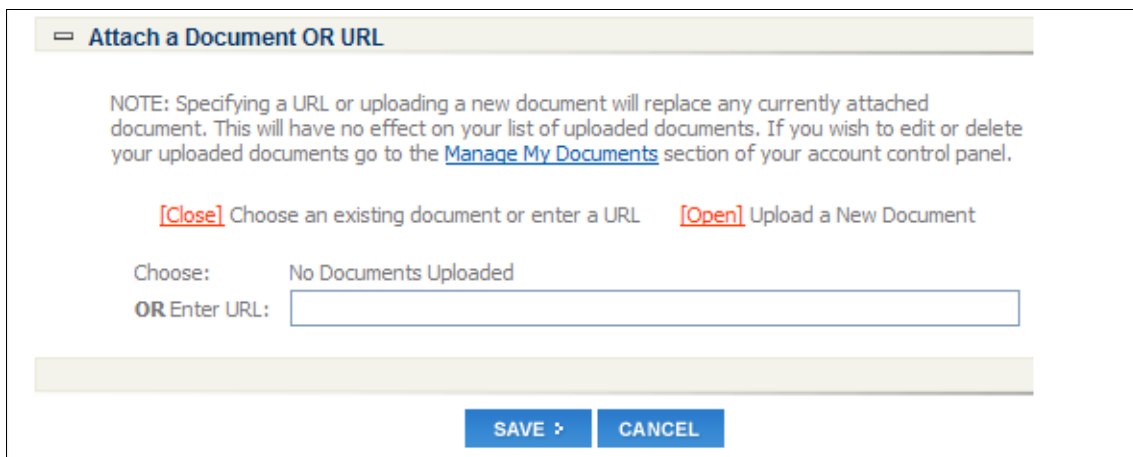
You can use the straightforward feature found within your 'My Account Details' page



**Listings / Invoices / Uploads**

- [View my invoices \(1\)](#)
- [Manage my listings \(0\)](#)
- [Manage my documents \(1\)](#) ←
- [View my quotas \(50\)](#)
- [Buy a new listing!](#)
- [Renew expiring listings \(0 waiting\)](#)
- [Add a purchased listing \(50 ready\)](#)

You also have the option to add documents within the bottom section of either your product or company profile pages



**Attach a Document OR URL**

NOTE: Specifying a URL or uploading a new document will replace any currently attached document. This will have no effect on your list of uploaded documents. If you wish to edit or delete your uploaded documents go to the [Manage My Documents](#) section of your account control panel.

[\[Close\]](#) Choose an existing document or enter a URL     [\[Open\]](#) Upload a New Document

Choose: No Documents Uploaded

OR Enter URL:

## How to access your web statistics

Within your 'My Account Details' page, you have the option to view all of the statistics (web analytics) associated with your company, product or service listings. This allows you to monitor the number of times your pages have been seen and visitor activity by country. You will also be able to monitor how many times visitors have visited your main website or contacted you via e-mail via the site. You also have the option to download your web statistics in a CSV file, for further analysis and monitoring in programs such as Microsoft Excel.



After clicking the above link, you will be redirected your web statistics monitoring page.

### My Statistics

Your statistics are only as accurate as the information the user supplies. If a user's browser is set up not to allow statistics recording then these results may not be accurate.

#### General Statistics

<b>Listing Name</b>	Jim's Advisors	<b>Directory</b>	Offshore Advisors
<b>Member Since</b>	2008-11-24	<b>Total Days Active</b>	4
<b>Total Profile Visits</b>	6		
<b>Visits Today</b>	0	<b>Average Per Day</b>	3.00
<b>Visits This Week</b>	6	<b>Average Per Week</b>	6.00
<b>Visits This Month</b>	6	<b>Average Per Month</b>	6.00

#### Actions and Click-Throughs

<b>Emails Received</b>	0	<b>Website Views</b>	0
<b>Referrals Sent</b>	0	<b>Document Views</b>	0
<b>Favorites Added</b>	0		
<b>Search Result Impressions</b>	0		
<b>Click Through Rate</b>	0%		

#### Historical Stats

<b>Visits By Day of Week</b>		<b>Visits By Month</b>	
<b>Tuesday</b>	2	<b>Nov</b>	6
<b>Thursday</b>	4		

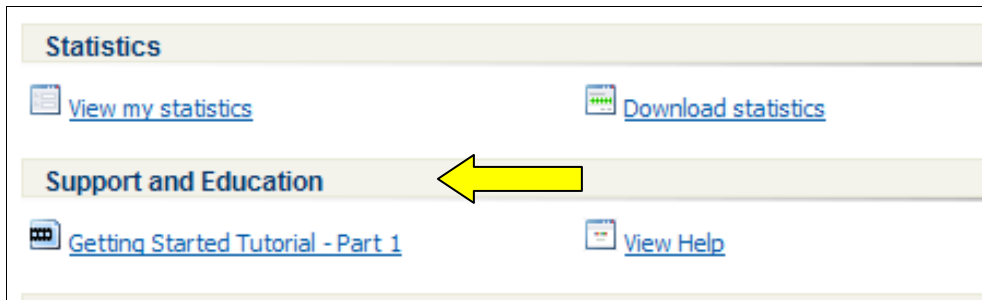
#### Geographical Stats

<b>Visits By Country</b>	
<b>Cayman Islands</b>	6

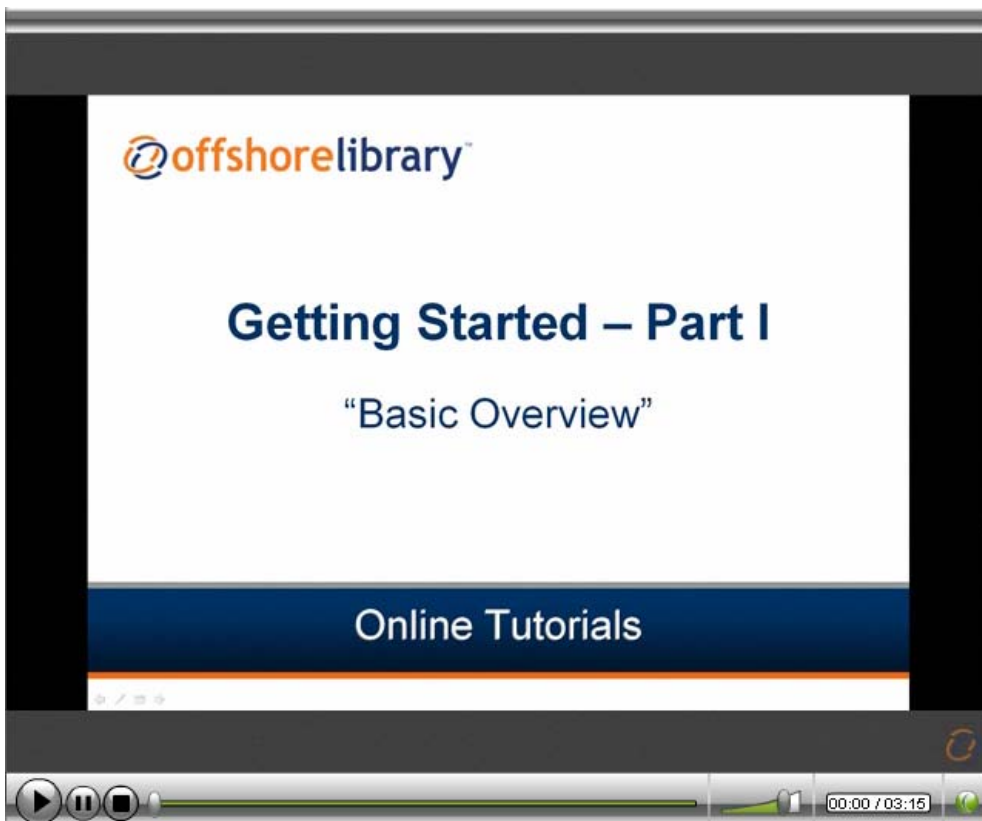
\*Please note:  
The stats within this report  
are for demonstration  
purposes only

### Further support and educational guides

Within your 'My Account Details' page, you have access to our 'Support and Education' section. We aim to build and develop the contents of the support based video demonstrations and guides, based on the common feedback and FAQ's received by our clients.



Getting Started – Part 1 (Basic Overview) tutorial

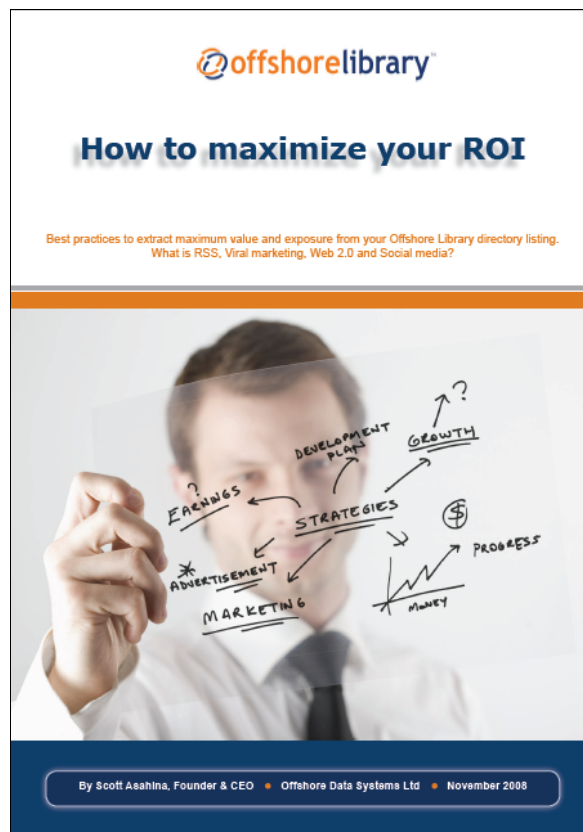


## 'How to Maximise your ROI' Guide

Within the 'Getting Started Guide' you have learnt all of the basic account functions, such as how to add, edit and update your information.

Now learn how to maximize all of your B2B and B2C opportunities by gaining a thorough understanding of all the Offshore Library 'Value Added Features & Tools':

- 🔗 Sourcing introducers & distributors – Uncover potential new business partners
- 🔗 Press Releases & Notifications – keep all site users and visitors informed and up to date, whilst increasing your overall brand/name awareness
- 🔗 Submitting articles and/or White Papers – Develop your credibility and gain additional marketing exposure.
- 🔗 What is RSS, Viral Marketing, Web 2.0 and Social Media?



If you have not already received a copy of 'How to Maximize your ROI' please contact [support@offshore-library.com](mailto:support@offshore-library.com) to request a copy.