



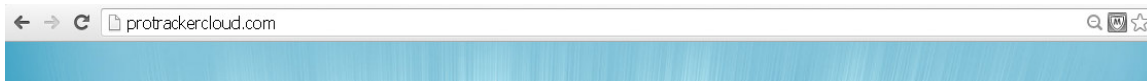
# ProTracker Cloud Quick Start

This Quick Start Guide will guide you through the initial two-factor authentication log in process on ProTracker Cloud secure.

You should have received an email from ProTracker Software Inc., that provides your user name and password and one of the following types of log ins:

- Device Authentication (for workstation setup)
- Mobile OTP (for mobile devices)

1. In a web-supported browser, type **protrackercloud.com**



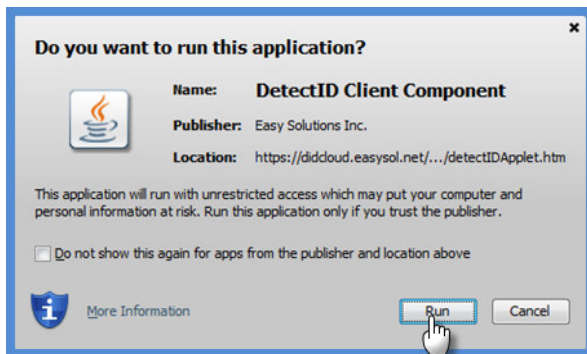
In the following screen enter the user name provided to you.

2. **User Name:** Type your user name (email address).
3. **Click LOGIN.**



Depending on the programs you have installed on your computer, and your user settings, you may see a DetectID install screen prompting you to click Run or Cancel. DetectID utilizes a Java program to enable device authentication for ProTracker Cloud. This ensures added security for your firm's information. This program must be allowed to run on your computer in order for you to continue logging in.

4. **Click Run.**



5. **Password:** Enter your password.

6. **Click Log in.**



Then next screen, depending on your user settings, will prompt you to enroll your computer (device authentication) or provide a mobile one time password (Mobile OTP) as part of the DetectID, two-factor authentication program for added security of your data.

### **For Device Authentication users:**

**You must enroll the computer you are using in order to continue logging in to ProTracker Cloud.** Each time you use a different computer to log in to ProTracker Cloud, you will be prompted to enroll that computer. You have up to ten enrollments against your ProTracker Cloud license.

When you see the screen: “Do you want to enroll this machine?”:

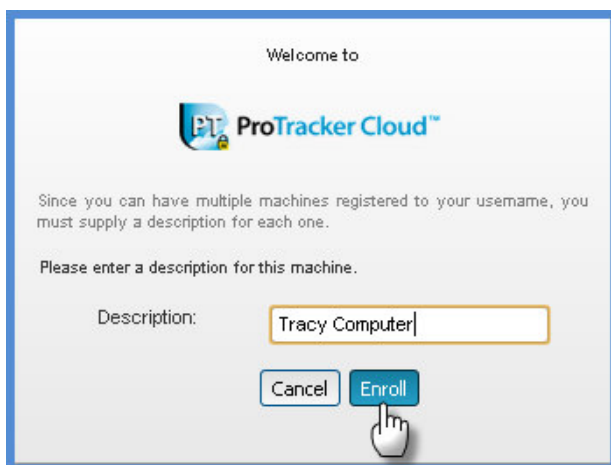
7. **Click Yes.**



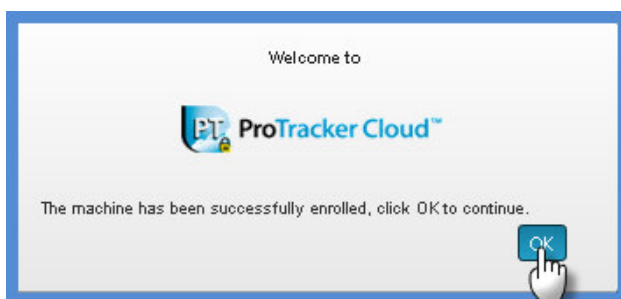
Next, when you see the screen “Please enter a description for this machine.”:

8. Description: Give your computer a descriptive name.

9. **Click Enroll.**



10. **Click OK.**



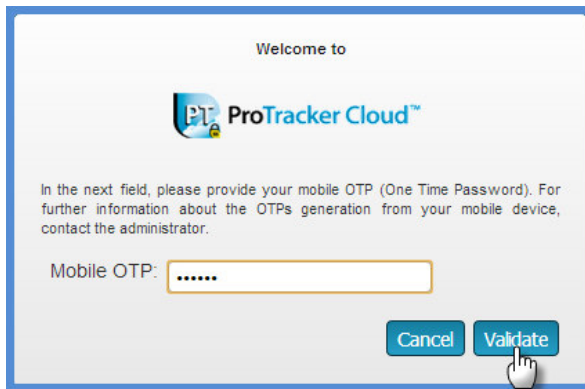
### **For Mobile OTP users:**

Mobile OTP is enabled through the DetectID token application on your Android or iPhone. Once the DetectID token manager app is installed on your mobile device, click the DetectID icon to open the program. Copy and paste the Activation Code that you received via email from detectidcloud@easysol.net into the "Add Token" field and click Accept.

A 6-digit one time password will appear and remain on your mobile device's screen for 60 seconds allowing you time to type this password into the Mobile OTP screen in ProTracker Cloud.

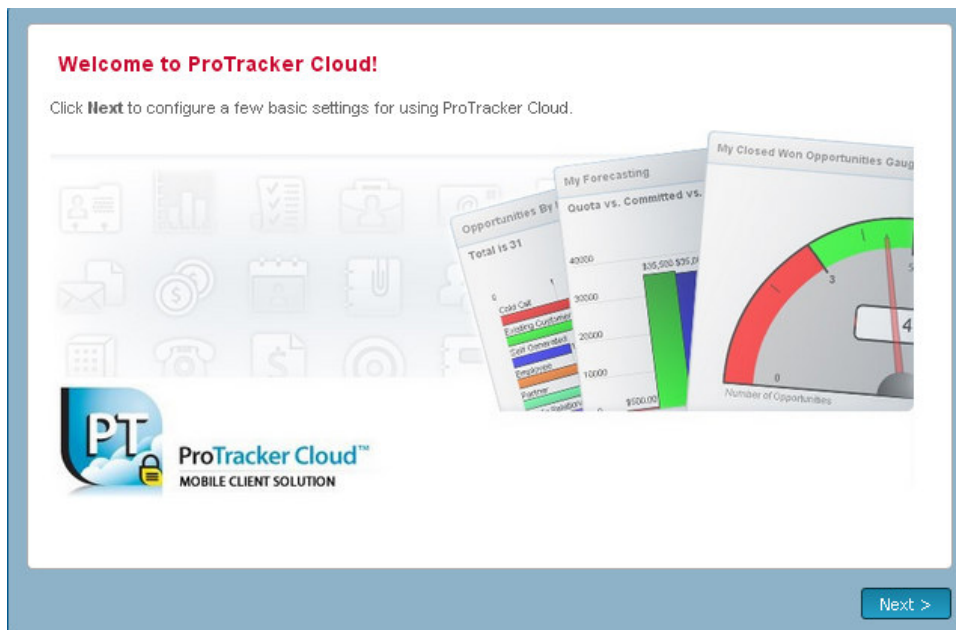
11. **Mobile OTP:** Enter your mobile one time password derived from your smartphone.

12. **Click Validate.**



Now that you are logged in to ProTracker Cloud for the first time, you will be guided through the New User Wizard.

1. **Click Next.**



If you are a trial evaluator, the user name you were assigned will appear in the First Name field by default. If you want to change this name, simply highlight and delete the name and type your own name.

**Your Information**

*Provide information about yourself. The information you provide about yourself will be visible to other ProTracker Cloud users.  
Fields marked with \* are required.*

First Name:  Last Name: \*

Email Address: \*

Office Phone:  IM Type:

Mobile:  IM Name:

Primary Address:

City:  State:

Postal Code:  Country:

Field descriptions followed by a red asterisk are required and must be completed in order for the form to be saved properly.

2. **First Name:** Add your first name.
3. **Last Name:** Add your last name.
4. **Email Address:** Add your email address.
5. **Click Next.**

**Your Information**

*Provide information about yourself. The information you provide about yourself will be visible to other ProTracker Cloud users.  
Fields marked with \* are required.*

First Name:  Last Name: \*

Email Address: \*

Office Phone:  IM Type:

Mobile:  IM Name:

Primary Address:

City:  State:

Postal Code:  Country:

6. Next, you may choose define your locale settings and some basic formats.

## 7. Click Next.

### Your Locale

*Specify your time zone and how you would like dates, currencies and names to appear in ProTracker Cloud.*

Time Zone:

Date Format:  Time Format:

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Currency:

Currency Significant Digits:  Example:

Decimal Symbol:  1000s separator:

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Name Display Format:

Next, you may define your email settings. You may also choose to skip this screen and complete your email set up later. The default email service provider is Gmail. ProTracker Cloud also supports Exchange, IMAP and Yahoo service providers. These email service providers are configured in the Emails module of ProTracker Cloud.

- Either complete your Gmail settings and click **Next** or,
- Leave these fields blank and click **Next**.

### Your Email Account

*Provide your email account username and password for the default outbound email server.*

Email Provider:

SMTP Username:

SMTP Password:

You will now see your Home screen of ProTracker Cloud.

The screenshot displays the ProTracker Cloud Home screen. On the left is a vertical navigation menu with categories: Home, Accounts, Activities, Billing, Calendar, Calls, Clients, Compliance, Contacts, Documents, Emails, Estate Planning, Firm, Goals & Objectives, Groups, Insurance, Meetings, Notes, Projects, Relationships, Reports, Retirement Planning, Sales & Marketing, and Tasks. The main area is titled 'My ProTracker' and includes sub-tabs for Sales, Marketing, Support, and Tracker. Below these are several data panels, each with a table header and a 'No Data' message: 'My Calls' (headers: Close, Subject, Related to, Start Date, Accept?, Status); 'My Meetings' (headers: Close, Start Date, Duration, Related to, Subject); 'My Top Open Opportunities' (headers: Opportunity Name, Client Name, Amount, Expected Close Date); 'My Clients' (headers: Client Name, Client Type, Primary Contact, Co-Client, Email Address, Assigned To); and 'My Leads'. On the right side, there is a 'My Activity Stream' panel showing a list of activities with user avatars, timestamps, and actions like 'Reply' and 'Suppress'. Below that is a 'Protracker News' panel with news items including 'Open Source Business Application for Enterprise - Indon' and 'SugarCRM World Tour - Vancouver'.