

# HOMETRAK COMPANION

Updating User Login procedure for HomeTrak V6.3

For Office Staff

Desktop, HTOnline and Mobile App

#### Why did HomeTrak change the log in procedure?

We changed the log in procedure for many reasons.

- We have eliminated the credentials that you would have to enter to change databases in the desktop version as well as the mobile app.
- The desktop version, mobile app as well as the HTOnline web portal all use the same user name and password.
- Users can now manage their own passwords without having to contact the office for a new password.

# Steps to updating HomeTrak to the new login system.

The steps below assume that prior to installing version 6, it was confirmed that each office staff has a valid email address associated to them.

#### Step 1

The first time you log into HomeTrak, you will have to use the old log in procedure. In order to do so you must leave all the fields blank and click on the "Log in with Access Key" button.

| - Hometak dendy - Login |                        |
|-------------------------|------------------------|
| • • •                   | Forgot Password        |
|                         |                        |
|                         |                        |
|                         |                        |
| Customer:               |                        |
|                         |                        |
| Username:               |                        |
| Password:               |                        |
|                         | ×                      |
| Press                   | Log in with Access Key |
|                         |                        |
|                         |                        |

| User Name: | Ray               |
|------------|-------------------|
| Password:  |                   |
| Office:    | HomeTrak Software |
|            |                   |
|            |                   |
|            | 1 1/1 40          |

You will now log into HomeTrak as you normally would.

You will now email a new identity for yourself as well as each office staff entered into HomeTrak. (Step2)

Press the *Relationships* icon in the main menu.



# Step 3

Click on the Office Staff tab at the top of the window.



#### Step 4

Choose the office staff person you want to send the identity email to by choosing the person in the Result panel on the left-hand side.

#### Step 5

From the "Profile" tab, click on the **Account** drop down menu and choose the "Manage Users Account (Identity)" option.



You will now create an identity account. Confirm that the "User Name" and "Email" fields have the correct email address for the office staff. The user name **must** be the email address!

| User:       | 🥵 Wright, Sue             | Is Identity: 🗹         | Email Telephony PI |
|-------------|---------------------------|------------------------|--------------------|
| User name : | swightprometaksupport.com | Both the User name and |                    |
| Email:      | swight@hometaksupport.com | same                   |                    |
| Cell #:     | 5180121383                | Sums.                  |                    |
| Status:     | • Active 👻                |                        |                    |
| Note:       |                           |                        |                    |

Click the "Create and Email Identity Account" button.

You will be prompted **"Are you Sure?**". When you press Yes the account will be created and the new identity email will be sent to the office staff person.

The system may ask if you want to migrate the existing users account. Choose "yes"

Repeat step 4 – 6 for each active office staff person.

**Congratulations!** You have successfully setup new identity accounts for each office staff person within HomeTrak Companion.

Each user will receive an email with the procedure for activating their account. Follow the steps below for activating an account.

# Activating New Identity Account HomeTrak Version 6.3

# Step 1

An email will now be sent to the specified email address. Open the email and click on the **"Please click here to activate your account"** link.

| Home   | Trak Identity   |
|--|---|
| Account Ve   | rification  |
| Hello Frank Jones,   |   |
| You have been gra<br>Please click here t                     | inted access to Ray Staging. We first need to activate your new <i>HomeTrak Identity</i> account and configure a passwork |
| Company Code: Y  | our Company Code  |
| UserName: <u>Y</u>   | our User Name   |
| Please remember of https://Rayaging.html                     | or bookmark the following URL so you can easily access this agency in the future:<br>metrakcloudtest.com;919236/HTPortal/ |
| If you have any qu   | estions, please contact the agency below.   |
| Sincerely,   |   |
| Ray Staging<br>10636 Scripps Summit C<br>San Diego, CA 92130 | r   |
| (519) 332-0868<br>HOffice@fortesting.ca                      |   |
| This is a message from H                                     | IomeTrak Inc. on behalf of Ray Staging  |

#### Step 2

You must now enter in and confirm your password and click "Change password"

|        | Create Password              |  |
|--------|------------------------------|--|
| Userna | ame                          |  |
|        | pmetrak.net                  |  |
| Passw  | ord                          |  |
| ••••   |                              |  |
| Confir | m Password                   |  |
| ••••   |                              |  |
| 0      |                              |  |
|        | Enter Descendent all all all |  |

You will now be directed to the HTOnline portal login screen. It is important to log into the portal as you will be prompted to enter in security questions which will be required if you forget your password. Enter in your newly created password and click on "Log in" button.

| Your password has been reset. | Please log  | in and configure your Security Questions.          | × |
|-------------------------------|-------------|--|---|
|                               | r loado log | mana compare year cocarry adecuone.                |   |
|                               | Use yo      | Log In<br>bur HomeTrak Identity account to log in. |   |
| UserName                      | 1 5         | sales@hometrak.net                                 |   |
| Password                      | <b>a</b> 1  | Password   |   |
|                               | 🗌 Reme      | in Enter Password then click                       |   |
|                               |             | © 2016 HomeTrak Inc.                               |   |

#### Step 4

You must now enter in all the security questions and press save. These security questions will be used if you every need to reset your password.

| Security Questions  |        |
|---|--------|
| Please complete three security questions. These will be used to verify your identity. |        |
| Question #1   |        |
| Please choose a question  | ~      |
| answer  |        |
| Question #2   |        |
| Please choose a question  | ~      |
| answer  |        |
| Question #3   |        |
| Please choose a question  | ~      |
| answer  |        |
| Save Answer all security questions and press save                                     | Cancel |
| © 2016 Home Trak Inc.   |        |

Close the web browser.

You have now been updated with the new login identity. If you have not already done so, close down the HomeTrak program and log back in. You will now log into HomeTrak using the new identity. For the first time, the log in screen will have 3 blank fields. The *"Customer"* field is found in the email that was sent to you labeled *"Company Code"*. The user name is the email address, and your password is the password you have created (once you have logged in the customer and username fields will be saved the next time). Press the **"Log In"** button to log into HomeTrak.

Section of email sent to each user

| Hello Frank Jone                            | es,                            |  |
|---|--------------------------------|--|
| You have been granted access to Ray Staging |                                |  |
|   | e to activate your account.    |  |
| Company Code:                               | Your company code              |  |
| UserName:                                   | Your user name (emain address) |  |

Example of new login screen

| 🚅 Hometrak Identity - Lo            | ogin 💌                          |
|-------------------------------------|---------------------------------|
|                                     | Forgot Password                 |
| Customer:<br>Username:<br>Password: | 99999<br>SomeThing@hometrak.com |

**Congratulations!** You have successfully completed the new log in procedure for HomeTrak Version 6.