Your Clients. **Your Practice.** **Your Profitability.**

PROTRACKER advantage

practice management for professionals

Getting Started Guide

ProTracker Advantage
for Access, SQL and Cloud Versions

December 24, 2009

Table of Contents

System Requirements

ProTracker Cloud users need only a high-speed Internet connection and a Java-enabled browser running on the platform of their choice. Cloud users may want access to the Recommended Hardware Accessories listed below.

Server Requirements (SQL only)

The server will store the Microsoft SQL Server Express software and the ProTracker Advantage database files.

- Windows 2000 SP4, Windows XP, Windows Server 2003 SP2, Windows Vista (32-bit versions)
- 1 GHz CPU
- 1 GB RAM
- 700 Mb disk space

Workstation Requirements (Access and SQL)

Each workstation will store the Advantage application software and the runtime version of Access required to run the application.

- Windows 2000 SP4, Windows XP, Windows Vista (32-bit versions)
- 1 GHz CPU
- 1 GB RAM
- 250 Mb disk space
- Microsoft Office 2002 or later for mail merges and exporting to spreadsheets.
- Microsoft Outlook 2002 or later for email archiving and PDA synchronization.

Recommended Hardware Accessories (All Versions)

- Document Scanner (TWAIN compliant)
- Printer with Envelope Feeder
- Single Label Printer (Dymo LabelWriter recommended).
- Business Card Scanner (Corex CardScan recommended)
- PDAs that synchronize with Microsoft Outlook

Software that is NOT required:

- Microsoft Access™ (Access 2003 runtime is included)
- Microsoft Outlook Exchange Server™
- Document Management
- Adobe Acrobat

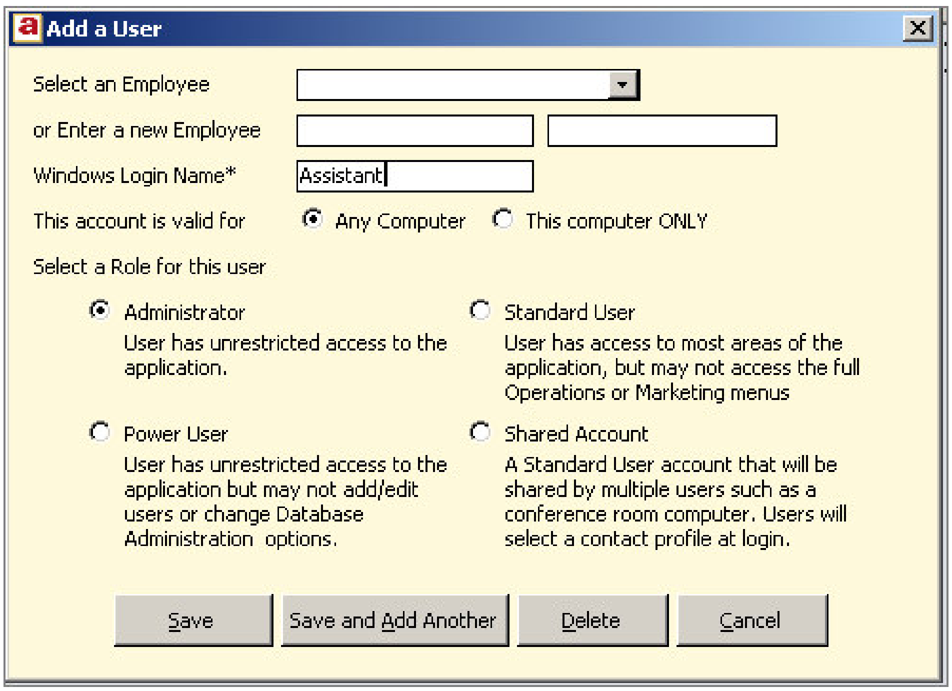
ProTracker Advantage runs only on PCs, not MACs. The screens and documentation are written in English only and currency calculations and displays are in US dollars and cents. Some calculations and reports are based on US laws and regulations.

Initial Administrative Setup

Before you begin to use ProTracker Advantage, perform the start-up steps in this section of the guide.

Adding Users

If the current user has not been added to the Advantage database, the **Add a User** dialog will appear. The person who will use Advantage from this computer should be added. Other employees should be added from the computer where they will normally access Advantage. Additional users may be added at any time by clicking the **Operations** menu and selecting **Users**.



Each user of Advantage must be entered as a Contact in the Advantage database marked as an employee of the firm. If the employee is already in the database, select the employee's name from the list in the **Select an Employee** field. If the employee's name is not in the dropdown list of Employees, enter the employee's first and last name in the **Enter a new Employee** field. The employee will be added as a contact in the database and marked as an employee.

The **Windows Login Name** field will be pre-filled with the user name used to log into this computer.

Each user of a Windows computer has a Login Name. If your firm has a Local Area Network (LAN), this Login Name is the name that a user enters whenever he or she logs in to the LAN. Even if your firm doesn't have a LAN, each computer has a User Name associated with each user account set up on the computer.

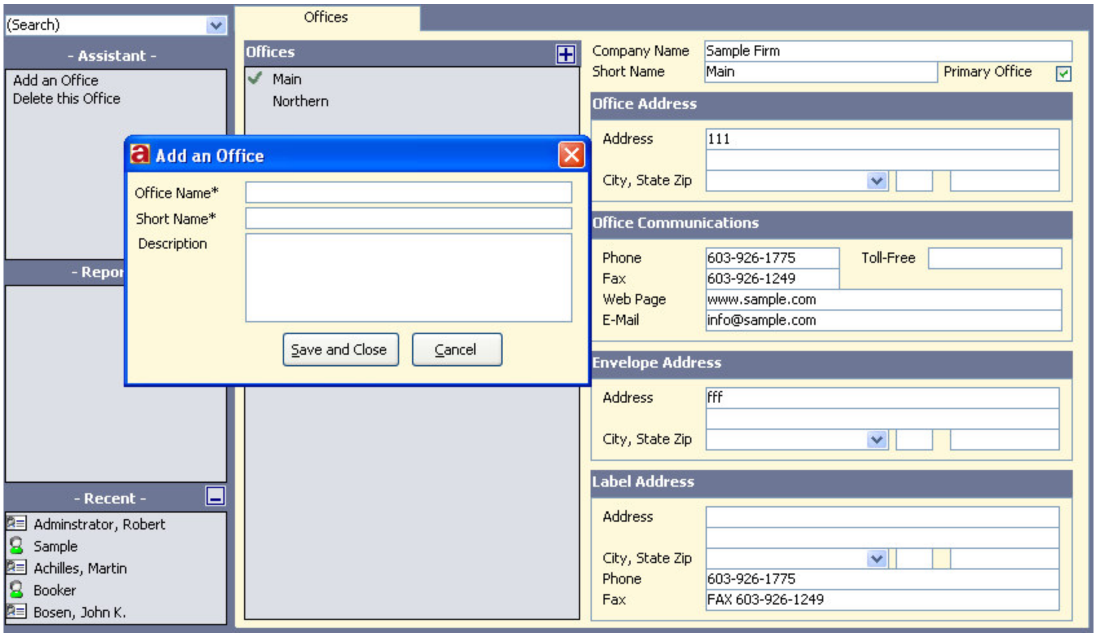
On a Windows XP computer, the Login Name of the computer's current user appears at the top of the **Start** Menu when the Window's **Start** button is clicked. It is this Login Name that must be associated with the corresponding user's employee record in Advantage.

If you are the Advantage Administrator, use this screen to associate an employee's Login Name with his or her employee record in Advantage. If the user may log into any computer where Advantage is installed, select **Any Computer**. If he or she will be accessing Advantage only from this computer, select **This computer ONLY**. In general it is best to select the default option of "Any Computer."

Select the user’s role from the options presented and select **Save** to add the user to the database. Click **Save and Add Another** to add additional users. If additional users are added from the same computer, make sure that **Windows User Name** field is changed to reflect the Windows user name of each user being added. To avoid confusion, it is easiest to simply add each user from the computer which that user will use to access ProTracker Advantage, after Advantage is installed on their computer.

For more information, press **F1** from the Add a User dialog, and read the Help file that corresponds to the Add a User dialog.

Office Setup



1. Open the **Operations** menu and select **Offices**.

2. On the Offices screen, go to the Assistant area in the left frame and double-click on **Add an Office**.

3. On the Add an Office dialog, enter the **Office Name**. This should be the full office name as it will be printed on correspondence.

   Enter a **Short Name** for the office. The Short Name is an abbreviated office name used to identify the office within ProTracker Advantage.

   If desired for clarification, enter a short **Description** of the office.

   Click the **Save and Close** button.

4. On the Offices screen, check the **Primary Office** checkbox (upper-right corner) to designate this office as your primary location.

5. Enter the **Office Address** and **Office Communications** information.

6. To print your return address on envelopes, enter the **Envelope Address** for this office. If your return envelopes are preprinted with your address, leave the **Envelope Address** fields blank.

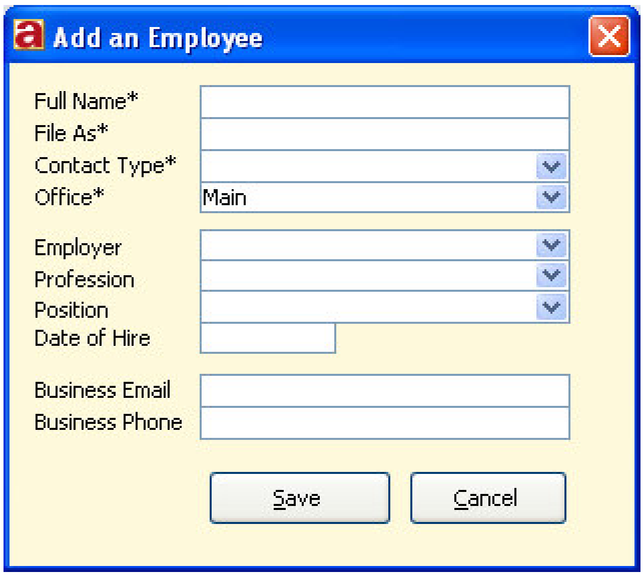
7. To print your return address on shipping labels, enter the Label Address information. If your shipping labels for this Office are preprinted with your return address, leave the **Label Address** fields blank.

8. To add another Office location return to Step 2.

Adding Employees

1. Open the **Operations** menu and select **Employees**. Note that you will only need to use this screen to add employees who are NOT users of ProTracker Advantage, since users that were added from the **Add a User** screen are already listed as employees. All Users of ProTracker are considered to be employees of the Office, but all employees may not be ProTracker Users.

2. On the Employees screen, go to the Assistant area in the left frame and double-click on **Add an Employee**.



3. On the **Add an Employee** dialog, enter the **Full Name** of the employee. This should be entered as **Salutation**, **First Name**, **Middle Name** or **Middle Initial**, **Last Name** and **Suffix**. Note that the asterisk (*) following Windows User Name indicates that this is a required field. This convention is used throughout Advantage screens to denote required fields.

4. The **File As** name is an index field and automatically defaults to **Last Name**, **Suffix**, **First Name**, **Middle Name** or **Middle Initial**.

5. Select a **Contact Type** of **Employee** from the pick list.

6. Select the **Office** where this employee primarily works.

7. In the **Employer** field, select your company name. If your company is not on the list, click **Cancel** to exit this screen and perform the **Office Setup** steps on the prior page before adding employees.

8. Select the employee’s **Profession**, **Position**, and enter the **Date of Hire**.

9. Enter their **Business Email** and **Business Phone** number.

10. Click the **Save** button to add the employee to the list.

11. To add the next employee, return to Step 2.

12. To edit employee information, double-click a person in the Employee list.

Setting up Firm-wide Document Management

If you wish to utilize Advantage's document management system, you will need to assign folders that will be used to store contact, client, and group documents.

- **Client, Contact and Group Documents**:

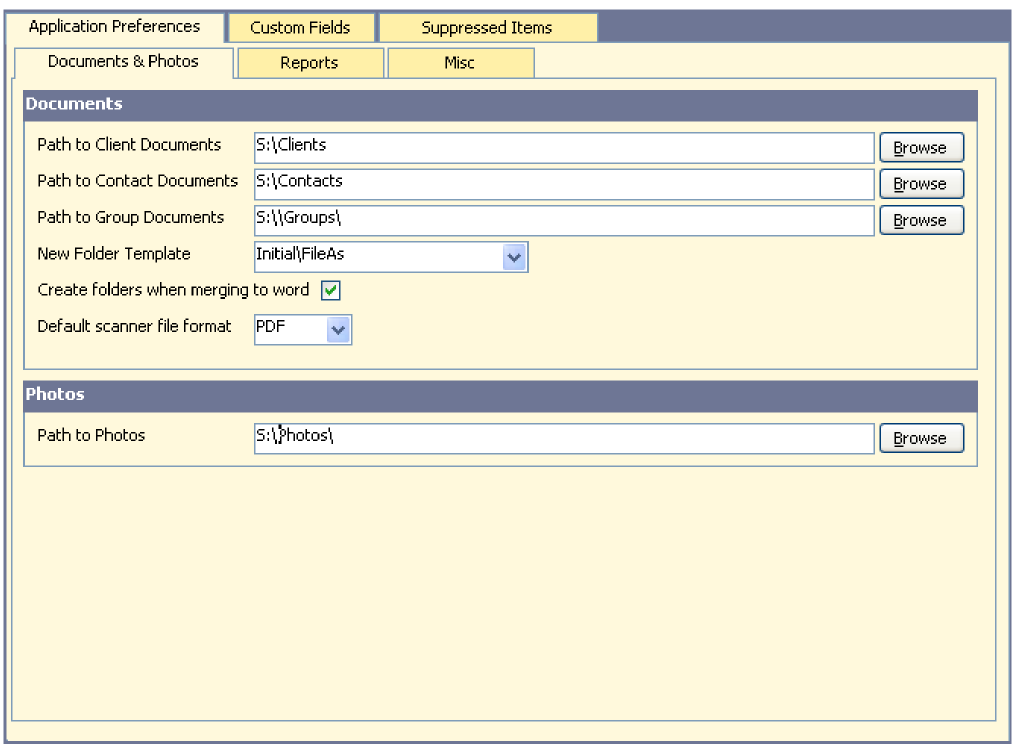
  If you are using Advantage in a multi-user environment, create these folders on a shared drive or server. If your server is mapped to drive letter S:\, for example, use Windows Explorer or My Computer to create folders to store client, contact and group documents. The following folders locations are suggested:

  S:\Clients
  S:\Contacts
  S:\Groups

  If you are using Advantage in a single-user environment, create folders to store client, contact and group documents using Windows Explorer or My Computer. The following folders locations are suggested:

  C:\Program Files\ProTracker Advantage\Documents\Clients
  C:\Program Files\ProTracker Advantage\Documents\Contacts
  C:\Program Files\ProTracker Advantage\Documents\Groups

- **Photos**: Advantage allows you to link digital photos of your clients and contacts to their profile records. Linked photos will be stored in the folder you designate. For this purpose, we recommend that you create folder **S:\Photos** for multi-user systems, assuming that **S**: is your shared folder's drive letter or folder **C:\Program Files\ProTracker Advantage\Photos** for stand-alone systems.



Now open the **Operations** Menu in ProTracker Advantage and select **Database Administration**.

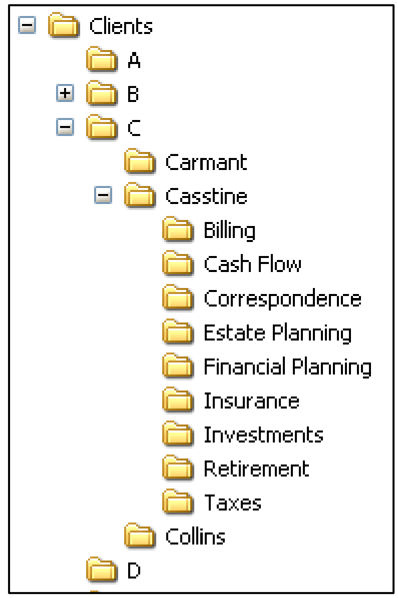
Click the **Browse** button to select the folders you created as the Path to Client, Contact, and Group documents.

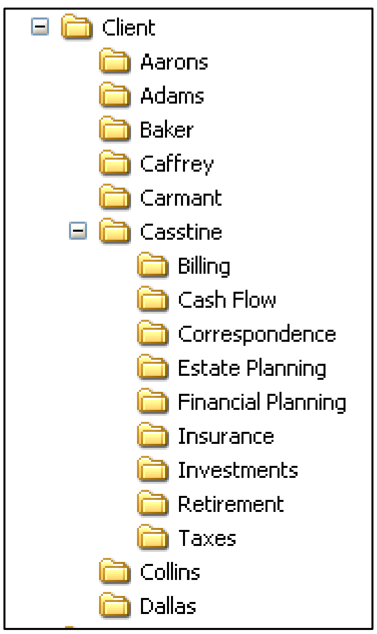
If you have pre-existing document folders for clients, you may wish to move documents from those folders to the new **Path to Client Documents** or you may select the pre-existing path as the **Path to Client Documents** instead of the newly created Clients folder.

New Folder Template

Once selected, the **Folder Template** option should not be changed. Your selection tells ProTracker how to create sub-folders beneath the Client, Contact and Group folders selected. There are eight options. For most situations, choice 1 or 2 is recommended:

1. **Initial\FileAs** - All documents for a given Client, Contact, or Group will be stored in a folder whose name is the first initial of the object's FileAs, and within the initial folder, in a sub-folder whose name is is the same as the object's FileAs name. This is a logical choice for a large firm that has over 50 clients. Note the example on the right.





2. **FileAs** - All documents for a given Client, Contact, or Group will be stored in a folder whose name is the object's FileAs name. This is a logical choice for a smaller firm of 50 or fewer clients. Note the example on the left.
3. **Initial\LastName** - This option is identical to Initial\FileAs, except the Contact or Client's Last Name is used in place of the File As field. In most cases, the FileAs field is the same as the Last Name.
4. **LastName** - This option is identical to FileAs, except the Contact or Client's Last Name is used in place of the File As field.
5. **Office\Initial\FileAs**
6. **Office\FileAs**
7. **Office\Initial\LastName**
8. **Office\LastName**

Note:

- Options 5-8 are identical to options 1-4, with the extra dimension of being intended for multi-firm offices or multi-office firms where it is necessary to store Contact, Client and/or Group documents separated by firm or office.
- Options 3 and 4, 7 and 8 should be used with caution. If documents are being filed for more than one Client or Contact with the same last name, they will all be in the same Client or Contact folder.

Photos

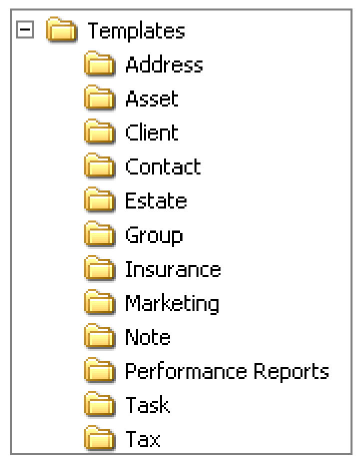
Click the **Browse** button to select the Photos folder.

For more information on setting up Document and Photo Paths, open the **Operations** Menu and select **Database Administration**. Press **F1** from the **Application Preferences** tab in ProTracker Advantage to open Help and display and article that explains all fields on this screen.

Setting Up Merge to Word Template Storage

If you plan to utilize ProTracker Advantage's Merge to Word mail merge features, use Windows Explorer or My Computer now to create a folder for storage of Microsoft Word templates.

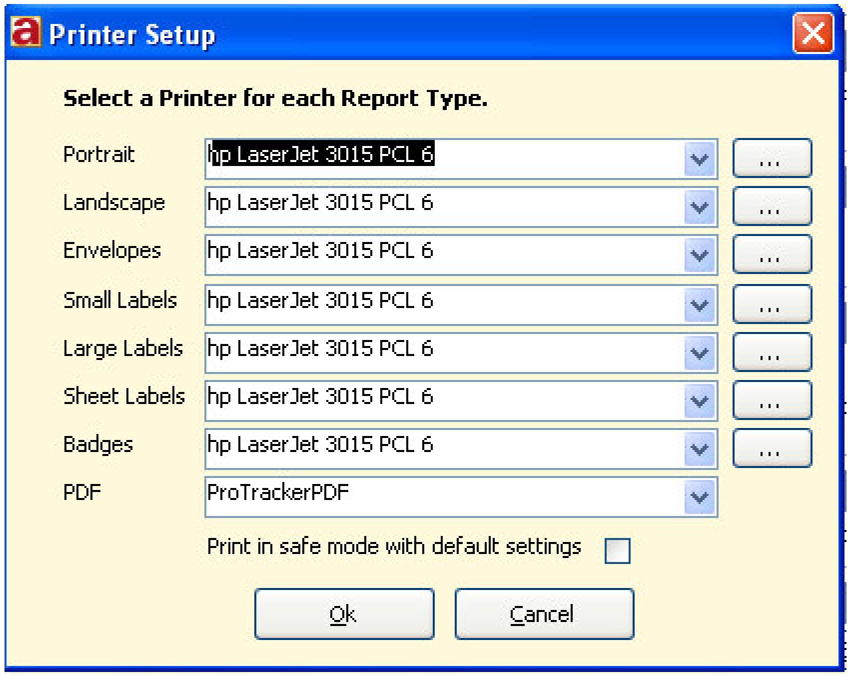
Advantage's Merge to Word feature may be accessed from many screens in Advantage. In order to ensure that templates you create from each location are easily found, and to allow users in the firm to share templates, use Windows Explorer or My Computer to create folder **S:\Templates** for multi-user systems, assuming that **S**: is your shared folder's drive letter, or folder **C:\Program Files\ProTracker Advantage\Templates** for stand-alone systems. Also, create separate sub-folders beneath the **Templates** folder as depicted to store templates used in each area.



Search for "Merge to Word" on the Index tab in Advantage Help for more information on storing and using templates.

Configuring Printers

To configure your printer settings in ProTracker Advantage, open the **Tools** menu and select **Printer Setup**.



Select a printer for each type of Advantage report and click  (the **Browse** button) to set margins and other settings.

Use the recommended settings for each report type from the Help screen (accessed by pressing the **F1** key).

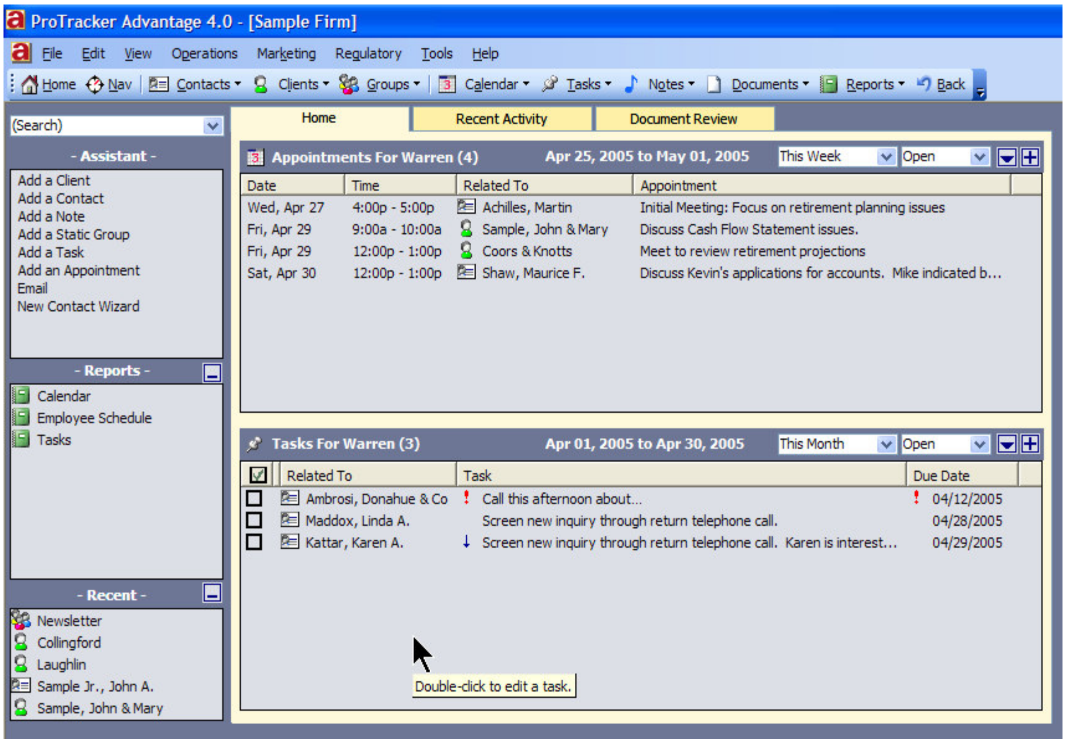
Note: Before you may select ProTrackerPDF as the "printer" for PDF files, you must install ProTracker's PDF writer. Click the **Home** button on the toolbar, select the **Options** tab, and double-click **Install ProTrackerPDF** in the Assistant area on the left of the screen.

Getting Started Tutorial

Introduction to ProTracker Advantage

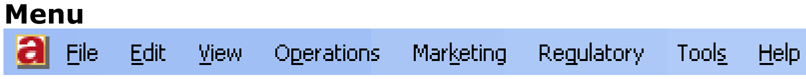
Every ProTracker Advantage screen consists of the following 7 areas:

Menu ▶
Toolbar ▶
Search Box ▶
Assistant ▶
Reports ▶
Recent ▶



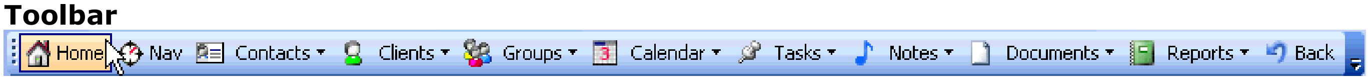
▲ Work Area ▲

Menu



Use the Menu to perform various Advantage commands. The Menu selections are **File**, **Edit**, **View**, **Operations**, **Marketing**, **Regulatory**, **Tools**, and **Help**.

Toolbar



The Toolbar buttons are used to jump easily to various Advantage topics found under the Menu's View command: **Home**, **Contacts**, **Clients**, **Groups**, the Advantage **Calendar**, **Tasks**, **Notes**, **Documents**, and **Reports**.

Click the **Nav** button to search for Contacts, Clients, and Groups.

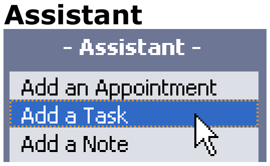
Click the **Back** button to return to a previous topic.

Search

The Search Box helps you to find Contacts, Clients, Groups, and Assets. Enter any three consecutive characters or more of a name, telephone number, ZIP code, or account number to view a list of entries that match your search. Many fields are searchable, such as email addresses, social security numbers, keywords, and employers. See the Help article under **Search -> Search Options** for more information.

If only one match is found, Advantage opens the Contact's Profile or Account Detail.

Assistant



The Assistant is a list of commands located below the Search box and includes frequently-used actions for the current screen. For example to schedule an appointment, double-click the **Add an Appointment** Assistant command.

Reports

Double-click one of the listed Reports to preview and print information pertaining to the current screen.

Click (the Minimize button) to hide the Reports list. When the Reports list is hidden, click (the Maximize button) to display it again. Minimizing the Reports list may be needed if more Assistant commands are available than will fit in the Assistant box.

Recent

The Recent area lists Contacts, Clients, and Groups that you have most-recently opened. Double-click a name to open their Profile.

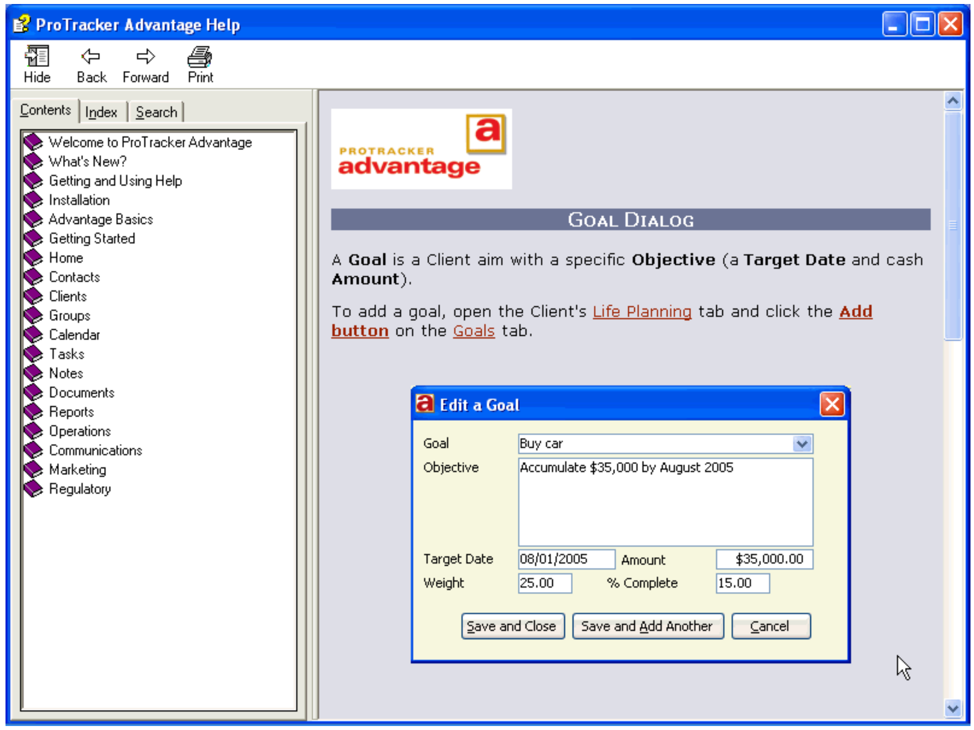
Click (the Minimize button) to hide the Recent list. When the Recent list is hidden, click (the Maximize button) to display it again. Minimizing the Recent list may be needed if more Reports are available than will fit in the Assistant box. You may also want to minimize the Recent list when using Advantage to assure client privacy during meetings.

Work Area

The Work Area is where Advantage screens are displayed.

The Help System

You can start the built-in Help System by opening the **Help** menu and selecting **ProTracker Advantage Help**, or by pressing the **F1** key at any time to view Help for the current screen.



Contents tab

The **Contents** tab is the Table of Contents for the Advantage Help System. Browse Help topics by double-clicking a book to view a list of subtopics.

Index tab

Use the **Index** tab to search for keywords in the Help text.

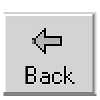
Search tab

If you cannot find what you want using the **Index**, try entering specific words on the **Search** tab. All Help files that contain the string you entered will be found, and the string will be highlighted in each file.

and

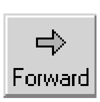

buttons

Click the **Hide** button to view Help without the **Contents**, **Index**, and **Search** tabs. When the tabs are hidden, a **Show** button replaces the **Hide** button. Click **Show** to view the tabs again.



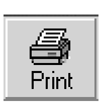
button

Click the **Back** button to return to the previous Help topic.



button

After you have clicked the **Back** button, you can click the **Forward** button to return to the next Help topic.

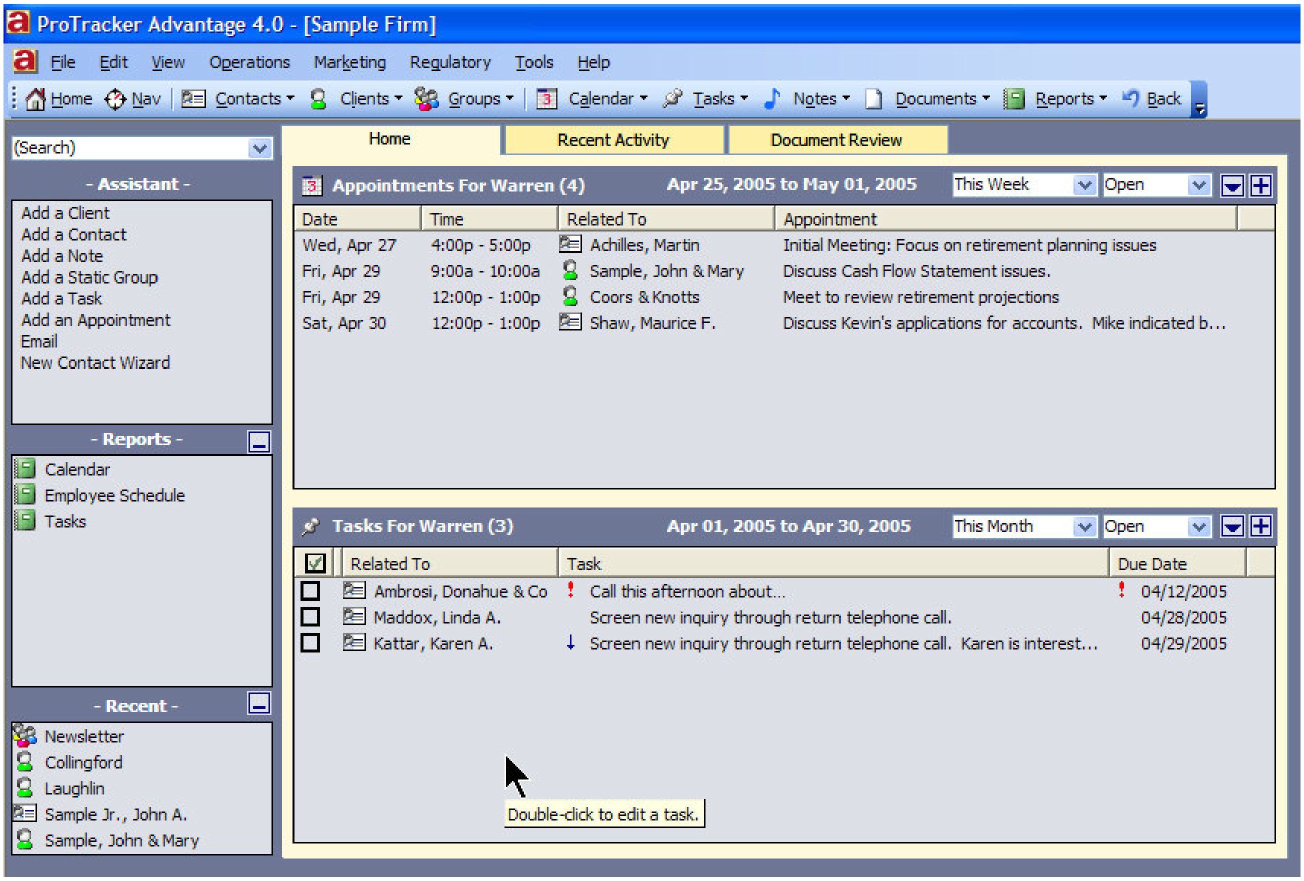


button

Click the **Print** button to print the selected topic only, or to print the selected topic and all subtopics.

The Home Screen

The **Home** screen displays your scheduled appointments and assigned tasks.



The **Appointments** panel lists all your appointments that are scheduled within the selected date range. Use the filters in the title bar to specify the date range for the listed appointments or to limit viewing to only upcoming appointments (Open), only previous appointments (Closed), or all appointments (Both).

- Double-click an appointment to see details.
- To schedule an appointment, click ⊞ (the Add button) in the upper-right corner of the Appointments panel or double-click the **Add an Appointment** Assistant command.

The **Tasks** panel includes tasks that have been assigned to you. Use the filters in the title bar to specify the date range for the tasks you want to see, or to list only the Open tasks, only the Closed tasks, or all Open and Closed tasks (Both). You also have the choice of Open (hide overdue) which will hide all past due tasks which are still marked as Open.

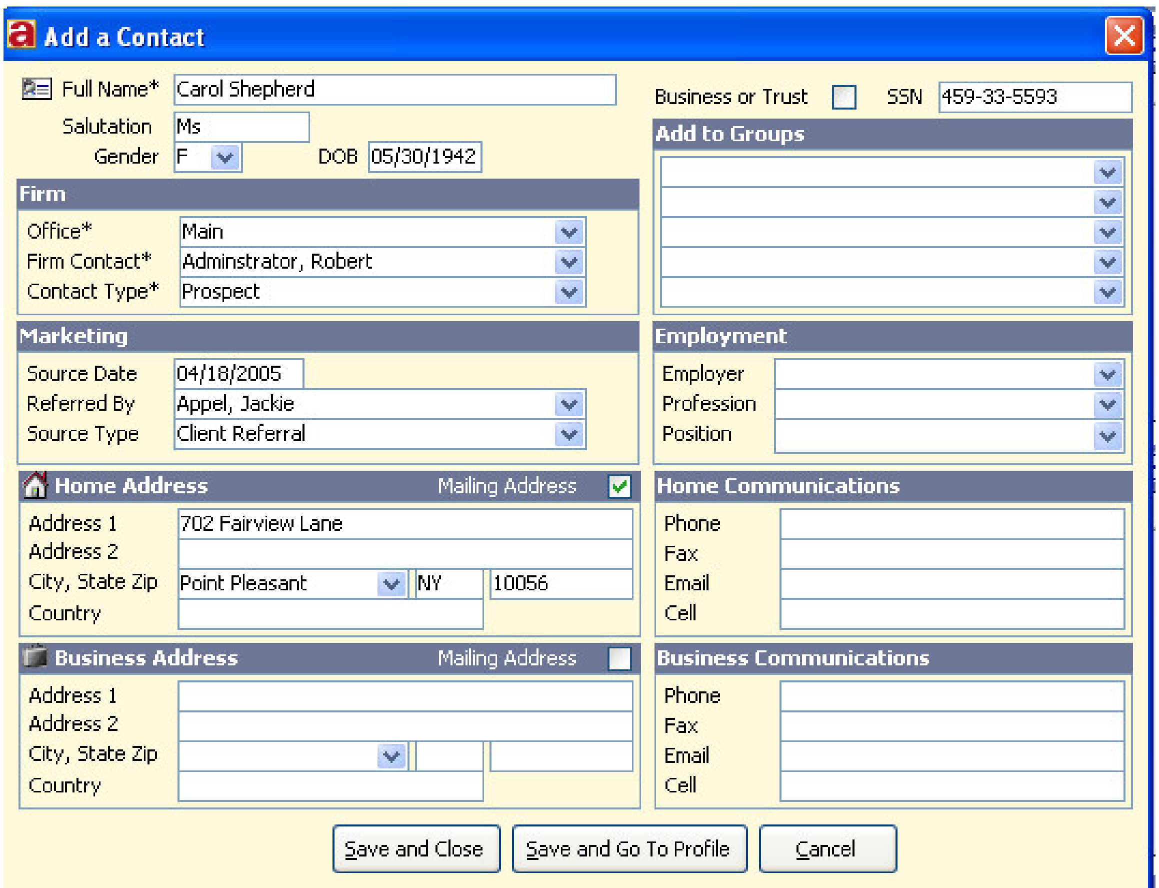
- Double-click a task to edit the task.
- To create a new task, click ⊞ (the Add button) in the upper-right corner of the Task panel or double-click the **Add a Task** Assistant command.

Add a Contact

Every person associated with your practice should be entered as a Contact once and only once. This includes, but is not limited to, employees of your company, prospective clients, existing clients, relatives of clients, beneficiaries of clients, attorneys, CPAs, etc. After a Contact is added, it can be designated as a Client, included in a Group, assigned as a beneficiary, or selected wherever a dropdown list of contacts is provided for selection.

Note: Again, every person, business or trust should have only ONE Contact record in Advantage. If an employee is also a client, for example, and the person has already been added to the database as a ProTracker Advantage User (see Adding Users on Page 4) or as an Employee (see Adding Employees on Page 7), then don't add them again as a Client.

Add a new Contact to the Contact List by double-clicking the **Add a Contact** Assistant command, or by clicking the **Contacts** toolbar button and selecting **Add a Contact**. The Add a Contact dialog opens.



Note that the asterisk after the field description indicates that entry is required.

- In the **Full** Name field, enter the Contact's first name, middle name or initial (optional), last name, and suffix. If the Contact is a business or a trust, rather than a person, enter the complete business name in the **Full Name** field and check the **Business or Trust** box.

- Select the **Office** that will be responsible for the new Contact, if the firm has more than one office.
    - Select a **Firm Contact** - the employee who will be responsible for the new Contact.
    - Assign a **Contact Type**. The Contact Type for a new Contact is usually one of the following:

        Prospect
        Prospects are prospective Clients.

        Client
        A Contact who has signed an agreement with your company and who will be billed for your services should be assigned a Contact Type of **Client**.

        Contact
        Assign a Contact Type of **Contact** to any professional with whom you may work on Client situations, such as attorneys, accountants, and insurance agents.

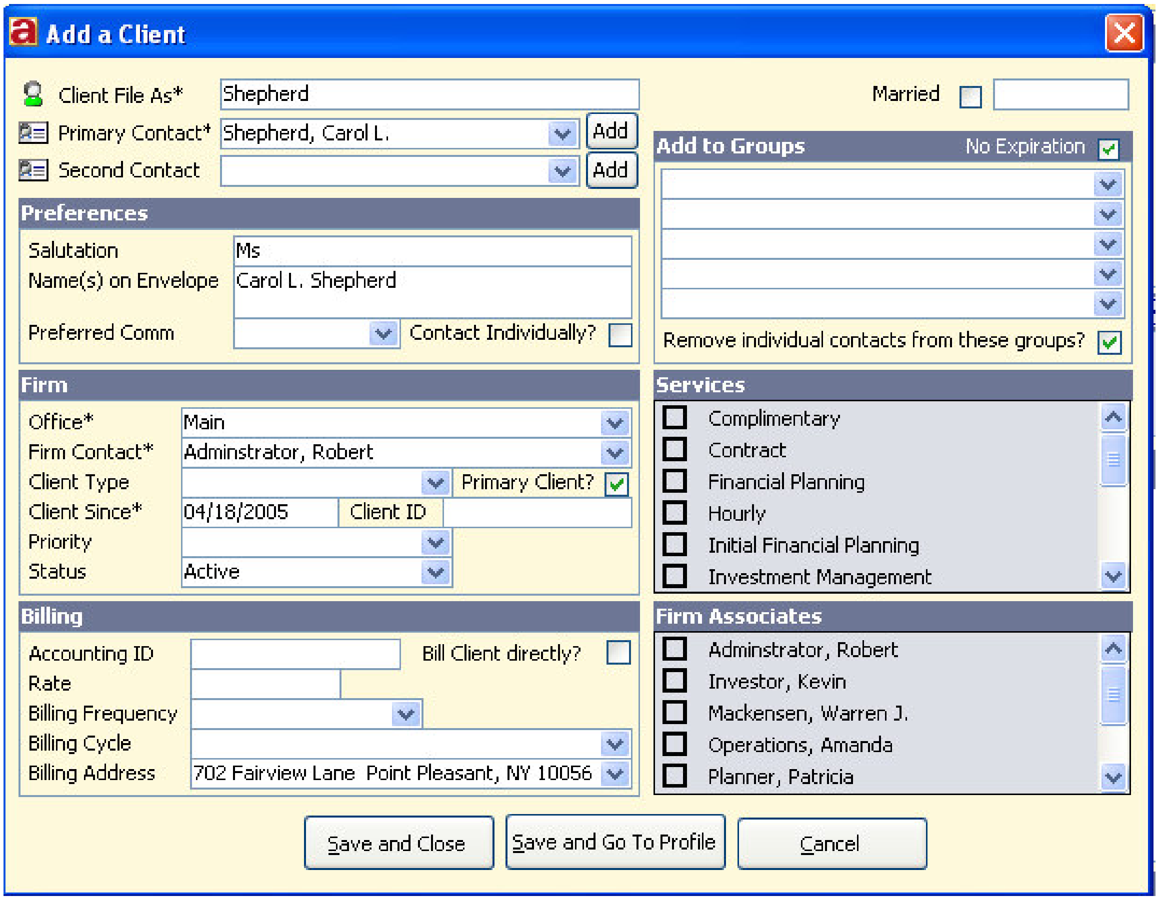
        Vendor
        Anyone that sells your company products or services should be entered as a **Vendor**. This includes repair companies, utilities, office products suppliers, and your computer consultant.

For more information on the definitions of fields on this screen, select F1 when the **Add a Contact** screen is displayed.

Click the **Save and Go To Profile** button to add the new Contact and begin entering additional information about the Contact on the Contact profile screen. Just click **Save and Close** to continue.

Add a Client

Add a new Client to the Client List by double-clicking the **Add a Client** Assistant command, or by clicking the **Clients** toolbar button and selecting **Add a Client**. The Add a Client dialog opens.



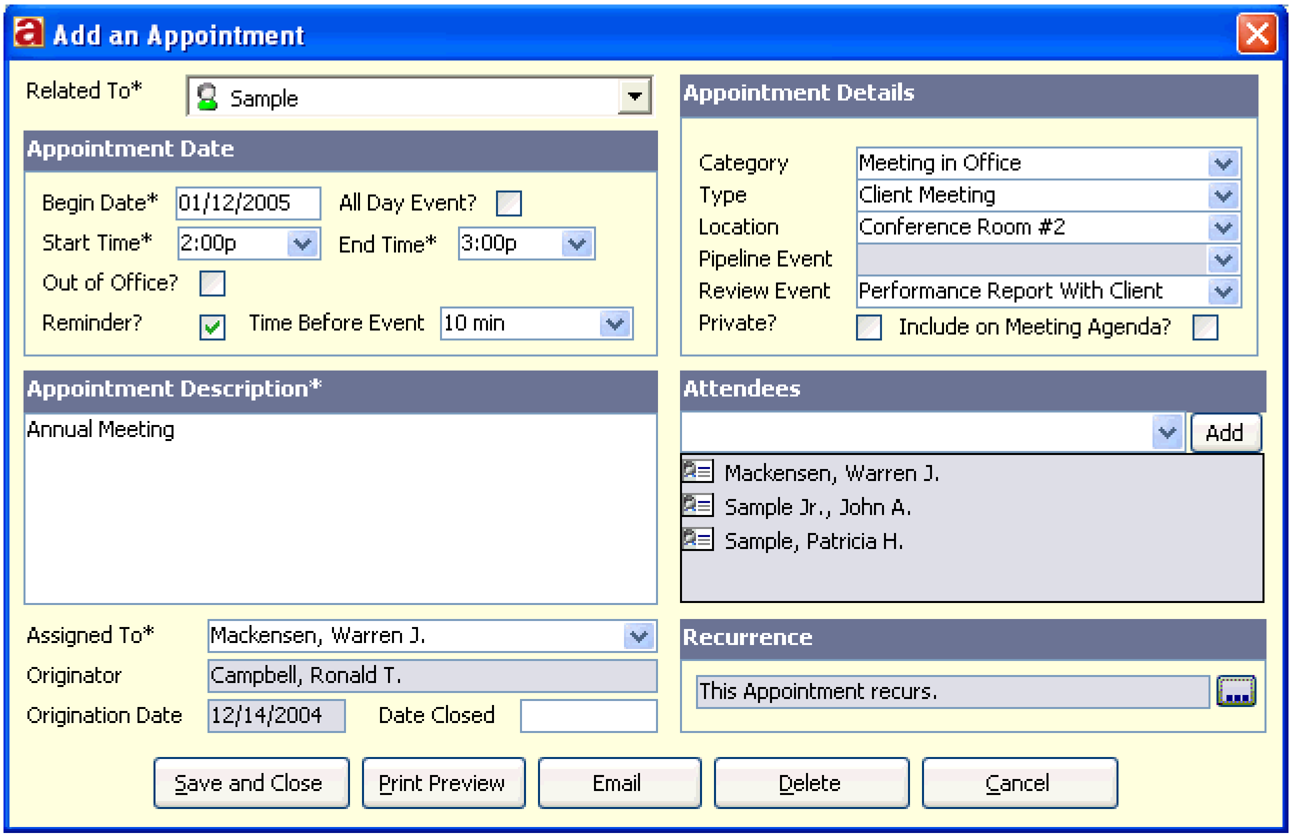
- Use the **Client File As** field to identify the client on lists and reports. Enter a short name that will allow you to easily identify this client. By default, Advantage will use the client's last name, but you may change this to suit your needs or distinguish between clients with the same surname.
- Select the **Primary Contact** for the Client. If the name of the Contact is not listed, click the **Add** button to open the **Add a Contact** dialog.
- If the Client is comprised of more than one contact (for example, a married couple), select the **Secondary Contact** for the Client. If the name of the Contact is not listed, click the **Add** button to open the **Add a Contact** dialog
- Select the **Office** where the **Firm Contact** works.
- Select a **Firm Contact** - the employee who will be responsible for the new Client.
- **Client Since** automatically displays today's date but may be changed if desired.

These are the only fields required to add a new Client. Click the **Save and Go To Profile** button to add the new Client, close the Add a Client dialog, and open the new Contact's Profile screen to begin entering additional information. Select F1 when the **Add a Client** screen is displayed for more information on the information requested.

Schedule an Appointment

To schedule an appointment, double-click the **Add an Appointment** Assistant command, or click the **Calendar** toolbar button and select **Add an Appointment**.

The Add an Appointment dialog will open.



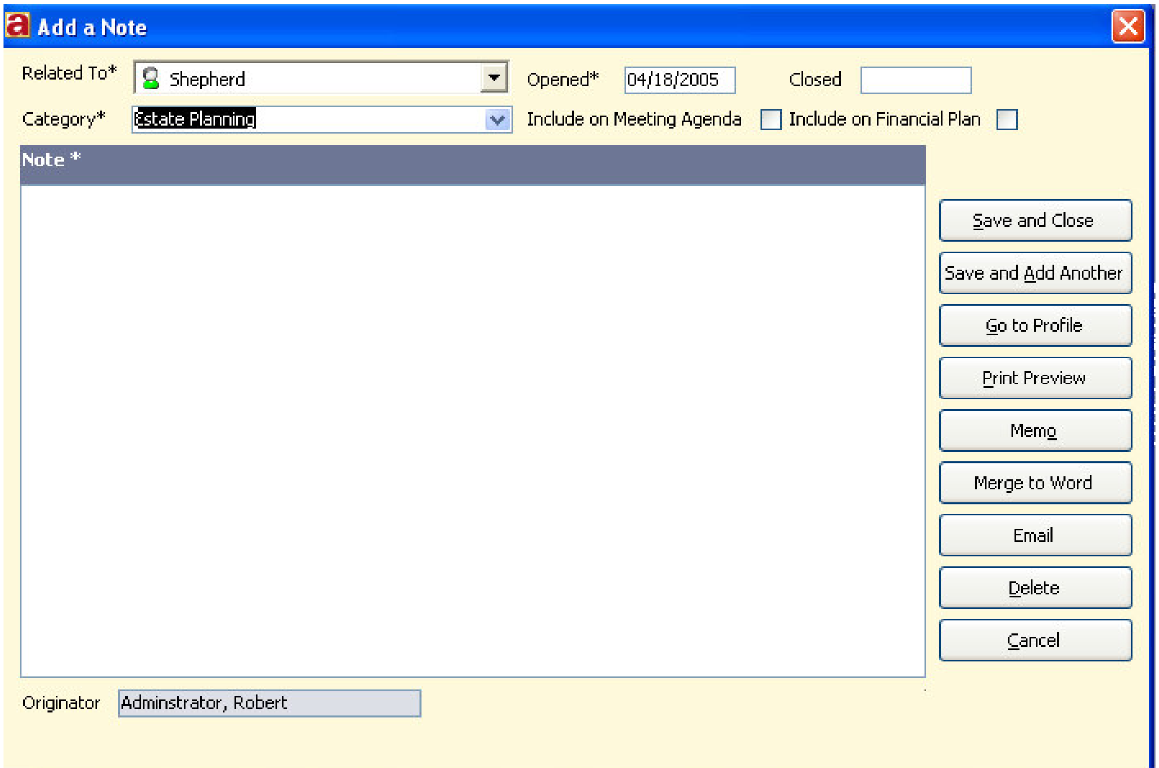
- Assign the appointment to a Contact, Client, or Group by selecting them from the **Related To** list.
- Enter a **Begin Date**, **Start Time**, and an **End Time**.
- Enter an **Appointment Description**.
- Verify that the **Assigned To** is correct.

These are the only fields needed to add an appointment. Click the **Save and Close** button to add the appointment to the Advantage Calendar and exit the Add an Appointment dialog.

For information on any of the other fields, read Advantage Help for the **Appointment Dialog**, available by pressing F1 when the **Add an Appointment** dialog is displayed.

Add a Note

To create a note, double-click the **Add a Note** Assistant command, or click the **Notes** toolbar button and select **Add a Note**. The Add a Note dialog will open.



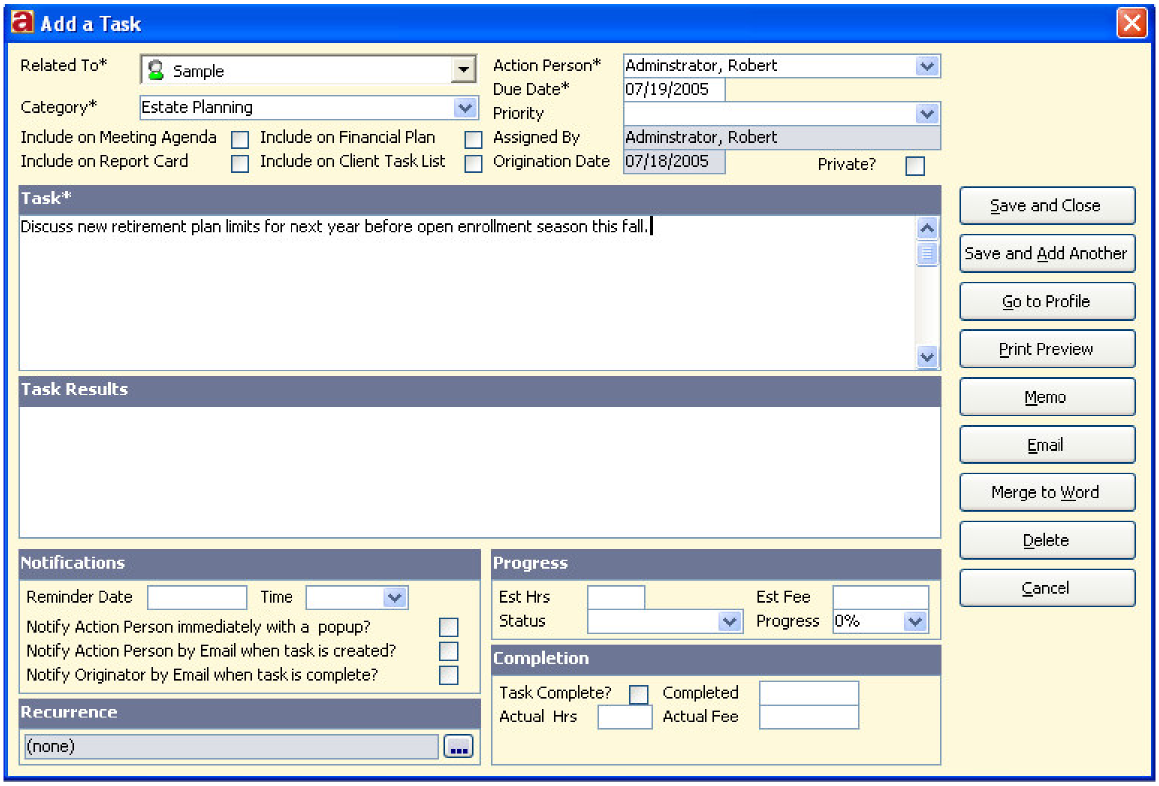
- Click the **Related To** dropdown list to select the Contact, Client, or Group to whom the note refers. If a Client or Contact is active when **Add a Note** is selected, that person will already be selected.
- Assign a note **Category.**
- Type your note in the **Note** field.
- The **Opened** field defaults to the current date but may be changed if desired.

Click the **Save and Close** button to add the note and close the Add a Note dialog.

For other fields, please read Advantage Help for the **Note Dialog**, available by pressing F1 when the **Add a Note** dialog is displayed.

Assign a Task

To assign a task, double-click the **Add a Task** Assistant command, or click the **Tasks** toolbar button and select **Add a Task**. The Add a Task dialog will open.



- Click the **Related To** list to select the Contact, Client, or Group to whom the task refers.
- Assign a **Category** to the task.
- Enter a description in the **Task** field.
- Select an **Action Person** – the Contact who will be primarily responsible for completion of the task.
- Enter the date when the task needs to be completed in the **Due Date** field.

These are the only fields necessary to add a task. Click the **Save and Close** button to add the task and close the Add a Task dialog.

For other fields, please read Advantage Help for the **Task Dialog**, available by pressing F1 when the **Add a Task** dialog is displayed.

Add a Group

There are two types of Advantage Groups: **Static Groups** and **Dynamic Groups**.

A Static Group is a combination of Contacts that are treated as a single entity. For example, a Group might be all of the members of a family or an association to which you belong.

Add a new Static Group to the Group List by double-clicking the **Add a Static Group** Assistant command, or by clicking the **Group** toolbar button and selecting **Add a Static Group**. The Add a Static Group dialog opens.

- Enter the **Group Name** as you would like it to appear on search lists and reports.
- Select a **Group Type** from the list. There are four Group populations:

  Any: any Contact, Client, or Employee can be added to the Group.

  Contact Group: only Contacts can be added as a member of the Group.

  Client Group: only Clients can be added to the Group.

  Employee Group: only Contacts with a **Contact Type** of **Employee** or **Employee/Client** can be added as a member.
- Clients and Contacts need periodic "touches" during the year to maintain relationships. Check the **Touch Option** checkbox if the Group should appear as a Touch Option on the Contact Profile screen. Examples of "touches" are: birthday cards, anniversary cards, holiday cards, Form ADV offers, and privacy notices.

Click the **Save and Edit Membership** button to add the new Group, close the Add a Static Group dialog, and begin adding Contacts, Clients, or Employees to the Group.

For more information on Static Groups and Dynamic Groups, open the Help Menu, select ProTracker Advantage Help, click the Index tab, and enter "**Groups.**"

Backing up your data

ProTracker Advantage is an enterprise-wide data storage system. Once the system is in operation in your practice, your data becomes mission critical. If lightning strikes your office, your active database may become hopelessly corrupted. If your office burns to the ground overnight or vandals steal your computers, *all of your Contact records are gone.* For these reasons and more, make it a habit to create a backup copy of your database every day and store it off-site every day.

For more information on backing up your database, click the **Help** Menu and select **ProTracker Advantage Help**. Enter the key words **Backup Database**.

Maintaining your database

The SQL Server version of Advantage does not require regular database maintenance.

If you are using the Microsoft Access version of ProTracker Advantage, an Advantage user with administrator privileges should make it a habit to run **File** > **Database Maintenance** weekly when all other users have closed Advantage.

For more information on maintaining your database, click the **Help** Menu and select **ProTracker Advantage Help**. Enter the key words **Database Maintenance**.

ProTracker Support Procedures

ProTracker Software is committed to providing you with the best possible customer support. These guidelines list your available support resources.

Built-in Help

The best source of information for ProTracker Advantage is the **Help** system. Through the **Help** system, product information is available instantly, 24/7. Use the Help file for answers to common questions about program usage or to learn more about the current screen.

How to use Help

Click the **Help** menu and select **ProTracker Advantage Help**, or press **F1** to open a Help article relevant to the current screen.

For quick answers to common questions, search Help's **Index** tab for keyword **FAQ**. For the big picture on a topic, search the **Help** Index for keyword **Overview**.

Use the **Search** tab to find topics containing specific words. More on the Help system is found and page 14 of this guide.

Online Tutorials

Use online tutorials to learn how to perform common tasks or to help train new users.

How to use the online tutorials

Visit **http://www.protracker.com/Training/** to view online tutorials or to schedule a live training session.

Knowledge Base

Use the Knowledge Base for configuration information or to find solutions to technical problems.

How to use the Knowledge Base

Visit **http://www.protracker.com/Support/** to view online support options. Click the Knowledge Base link to search for specific articles.

Customer Support by Email

Customer support by email is available from 9 am to 5 pm ET Monday through Friday. Generally, emailed inquiries receive a response within 4 working hours. Please be aware that during times of heavy volume, this initial response may be delayed. To ensure a prompt response, submit your inquiry only once and include as much detail about your question or problem as possible.

When to use Email Support

Contact support by email with questions or comments that don't require an immediate response or to request new features. This will allow us time to research your question thoroughly and provide an accurate and timely response.

How to use Email Support

To ask a general question about the program: Click the **Help** menu and select **Contact Customer Support.** We prefer to receive questions by email using this menu option for the following reasons:

1. The email will include an attached report that tells us your current version number and configuration.
2. Written requests allow us time to research the problem and recommend appropriate steps.
3. Operational questions can often be answered by helping you find the appropriate Help article, or links to the appropriate recorded tutorials.
4. Common questions can quickly be answered.
5. Answers that require lengthy telephone conversations can be scheduled at a time convenient for both of us.

To report a problem: Click the **Help** menu and select **Contact Customer Support.** When reporting a problem, please include as much detail about the problem as possible. The better your description, the quicker we can assist you.

- Describe the steps you took that resulted in unexpected behavior.
- Tell us what you expected to see.
- Tell us what you saw instead.
- Include screen captures or other graphics as appropriate and the exact text of any error messages if any are displayed.
- Tell us how long the problem has existed and whether there have been any recent changes to the hardware, software, or settings on the affected computer.

To request a new feature: Click the **Help** menu and select **Submit an Enhancement Request**. We recommend that requests for new features be submitted in writing to avoid ambiguity.

- Describe the particular feature(s) you'd like to see.
- Include screen captures or other graphics that illustrate the suggestion, as appropriate.
- Explain why you think your feature request will be useful to you and other users.

Customer Support by Phone

Please call us if the resources above do not solve your problem, or your question requires an immediate response. Customer support by phone is available from 9 am to 5 pm ET Monday through Friday at **603-926-8085**. Every phone call is nearly always greeted by a human voice. During times of heavy volume, your call may go to voicemail. Please be patient, we will get back to you as soon as possible.

When to call Support

Call support if your problem or question requires an immediate response, such as loss of database connectivity, or an expired license key.

How to call Support

When requesting support by phone, please call from the computer experiencing the problem and be prepared to assist customer support staff in troubleshooting your issue.

Support for non-ProTracker related software or hardware

For help with error messages, system performance, non-ProTracker hardware and software issues, especially printers, networks, and system security, click the ProTracker **Help** menu and select **Knowledge Base**. If you cannot find the answers in our **Knowledge Base**, we recommend contacting the manufacturer of the non-ProTracker hardware or software for the fastest and most accurate answers to your questions.