CHAPTER 1
INSTALLING BTRACK

bTrack includes its own bTrack Web Server that you can install on any server or PC with a Microsoft NT, XP or Windows 2000 operating system. This chapter includes the following items:

- System requirements
- Downloading bTrack to your desktop
- Installing bTrack

SYSTEM REQUIREMENTS

Before you install bTrack, read these system requirements to make sure you are using supported hardware and software:

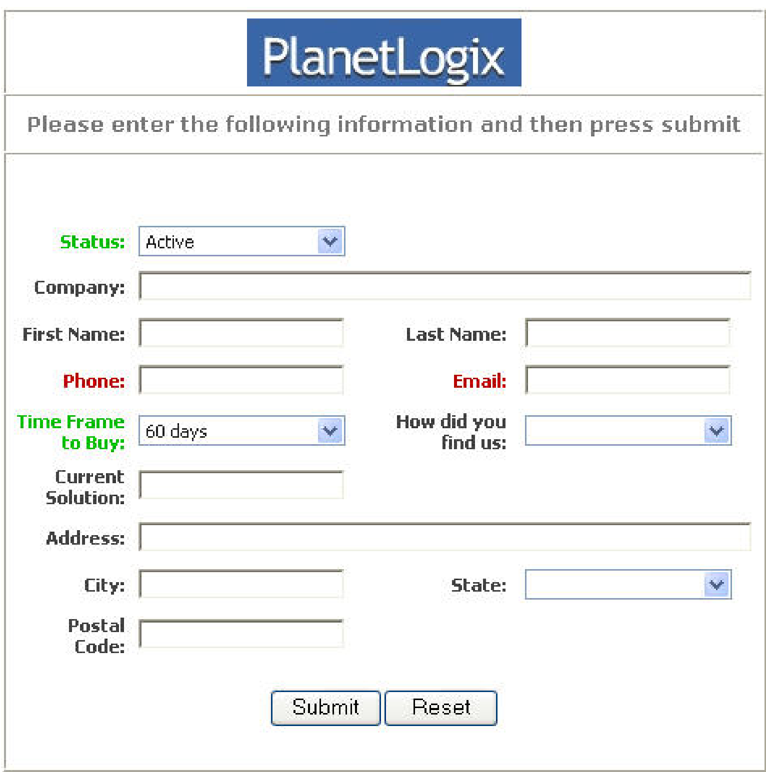
Equipment	Requirements	
Server Hardware	*Minimum*	800 MHz or higher single processor 1GB memory 1GB operational disk
	Recommended	1GHz or higher multiprocessors 2GB memory 2 GB operational disk space
Server Operating System	• Windows 2000 Server • Windows 2000 Advanced Server • Windows Server 2003 Family	
Web Server	• Microsoft Internet Service (IIS), version 4.0, .0 or 6.0 • iPlanet Web Server 4.1 • Sun Java System Web Server 6.0, most recent service pack (formerly SunOne) • **Error! Bookmark not defined.** Web Server (recommended for evaluation and smaller systems)	
ODBC	• Windows 2000 Professional, most recent service pack • Windows 2000 Server, most recent service pack • Windows 2000 Advanced Server, most recent service pack	

Equipment	Requirements
	• Windows Server 2003 Family • Microsoft Windows XP Professional
Database	• Microsoft Access 2000 or Microsoft Access 2002 (drivers provided) • Microsoft SQL Server 6.5 or later or 2000 • Oracle, 8i or later
Web Browsers	Microsoft Internet Explorer, version 6 or later
Handheld Devices	bTrack is accessible from a wide array of mobile devices. Most browsers available on handheld devices can be used to access bTrack.

DOWNLOADING BTRACK TO YOUR DESKTOP

Your first step in installing bTrack is to download it to your desktop:

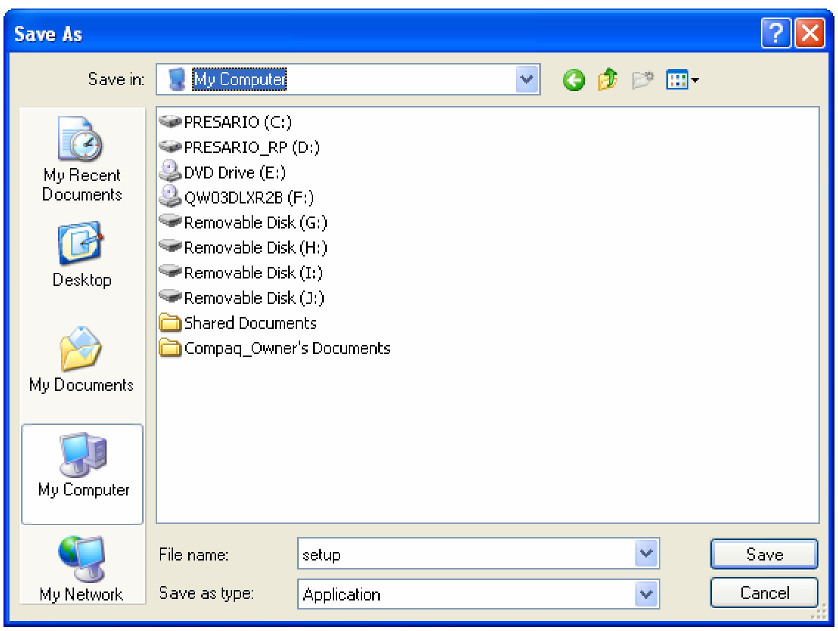
1. Go to http://www.bTrack.com and click on ***Download bTrack***. A screen is displayed requesting your contact information.



2. Complete your contact information and click ***Submit***. A screen with download information is displayed.

3. Click ***Download Now***. A File Download – Security Warning screen is displayed.

4. Click ***Save***. A Save As screen is displayed.

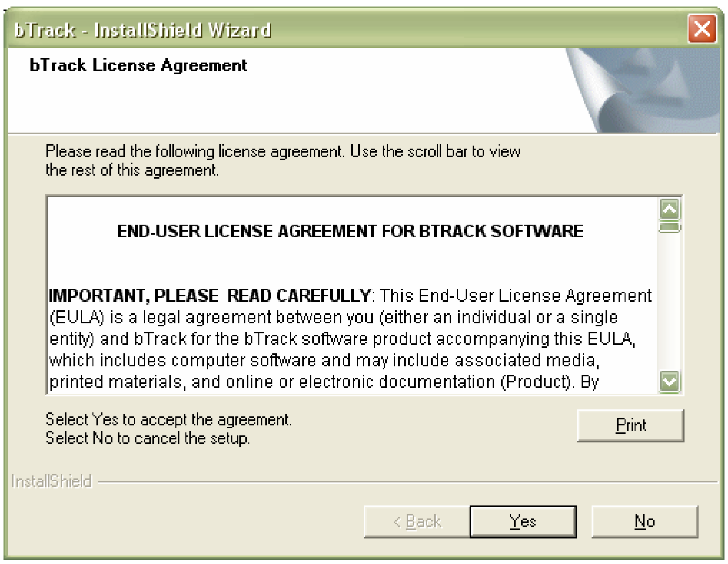


5. Click ***Save as*** again to save the setup.exe file to your computer.
6. When the download is complete, the Download Complete screen is displayed. Click ***Close***.

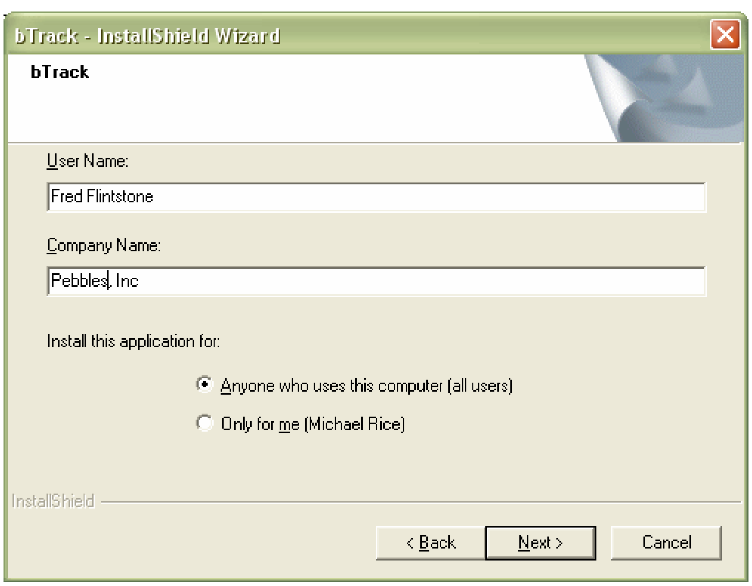
INSTALLING BTRACK

Once you have downloaded bTrack, you are ready to install it. Follow the instructions in this section to install bTrack:

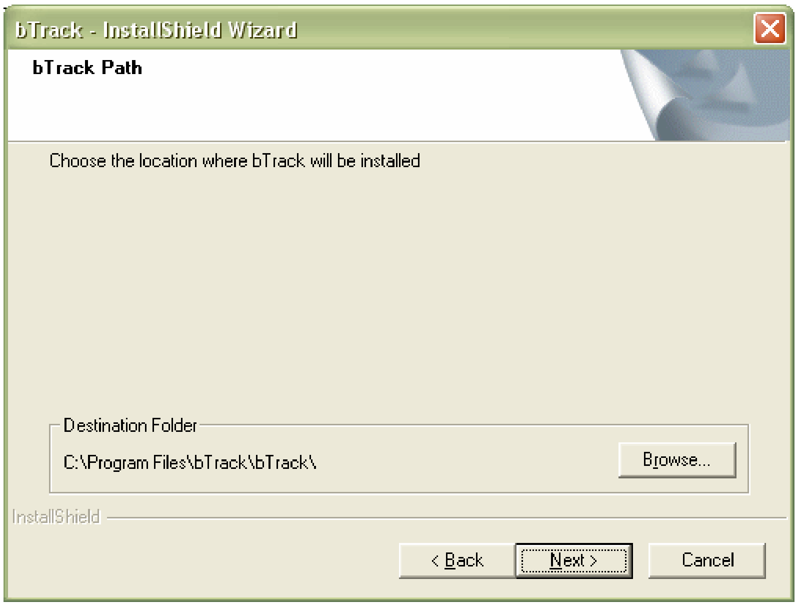
1. Exit all Windows programs you have open on your computer.
2. Click on the ***Setup*** file you just saved to your desktop. The License Agreement screen is displayed.



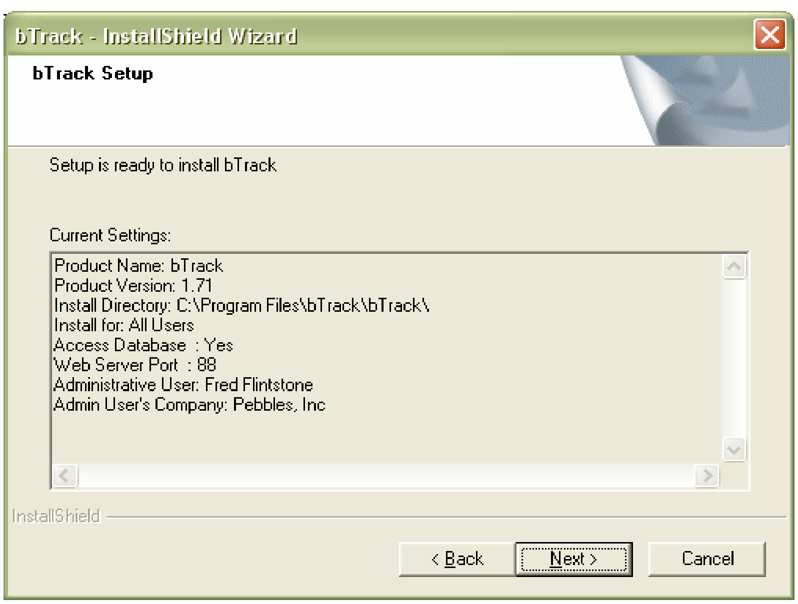
3. Click ***Yes*** to continue. The second bTrack installation screen is displayed.



4. Complete this screen, typing in the user's name and the company name. Also indicate whether anyone who uses the computer will have access to bTrack, or only one user.
5. Click ***Next***. The third bTrack installation screen is displayed, allowing you to select a destination folder. You can accept the default location or use Browse to select a different location.



6. Click ***Next***. The fourth bTrack installation screen is displayed, allowing you to verify your installation information.



7. Click ***Next*** to install bTrack. The installation begins.

Now that you have installed bTrack, you should see the ***bTrack Administrator*** and ***bTrack Client*** icons on your desktop. Go to Chapter 2 to explore how to use bTrack for your organization.

CHAPTER 2

EXPLORING BTRACK CLIENT

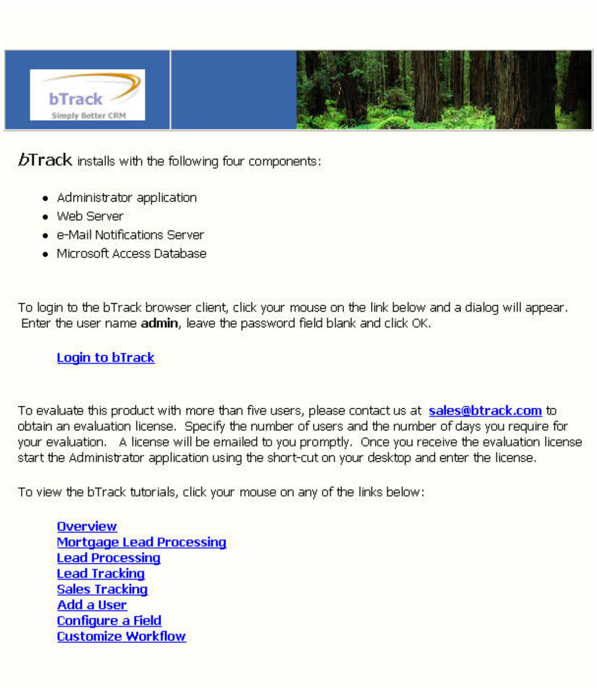
bTrack recommends that you explore your new system before implementing it with real data from your organization. To help you do this, bTrack comes with a sample database already loaded with defaults and one sample user, the **sysadmin** administrator. As you explore the database, you can add four more sample users. You can also add unlimited groups, accounts, etc. as needed to test the system.

The five sample users expire after 15 days. If you need more evaluation licenses or additional time, please contact **Planet Logix**.

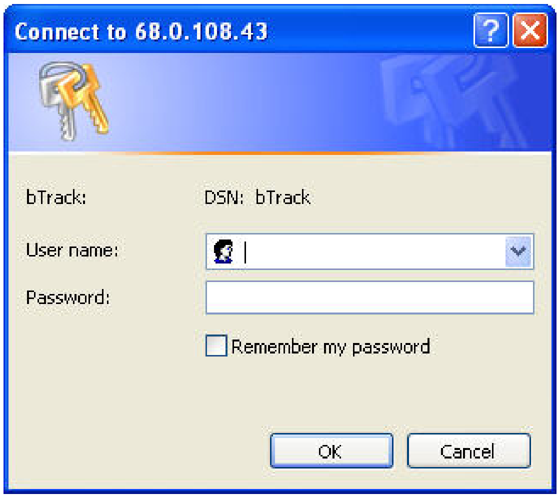
There are also tutorials on the Start page to help you explore bTrack.

To get started exploring bTrack,

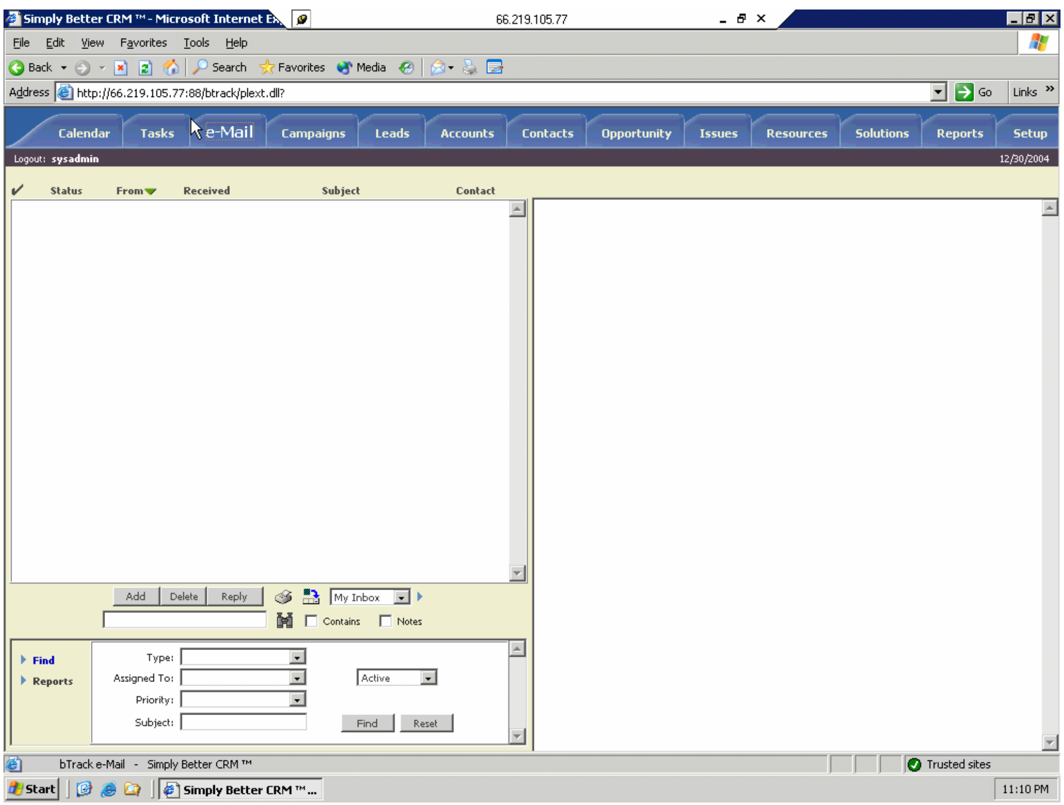
1. Click on the bTrack ***Client*** icon on your desktop. The bTrack Start page is displayed.



2. Click the ***Logon to*** bTrack link. A Login box is displayed.



3. In the User Name field, type ***admin***. Leave the password field blank.
4. Click *OK*. The bTrack Browser screen is displayed.



The bTrack Browser allows users to:

- Access, submit, and modify items for each area in which they have privileges
- Create, maintain and execute reports
- Manage notes and attachments
- Send and receive Microsoft Outlook email associated with items
- Search for items
- Modify user preferences
- Set email notifications for specific items
- Submit and update items within or without a workflow process
- Access bTrack via a handheld device

Both customers and partners can use the bTrack browser. Note that users will only have access to areas and tasks that the administrator grants them. See Chapter 3, Customizing bTrack, for information about assigning permissions and privileges.

ALTERNATIVE WAYS TO LOG ON TO BTRACK

In addition to clicking on the bTrack icon from your desktop, there are three additional ways to log on to bTrack:

- Select bTrack ***Client*** from your computer's Start Menu
- Access bTrack through the bTrack Administrator by selecting ***Web Client*** from the Tools Menu

OVERVIEW OF THE BTRACK BROWSER

From the bTrack browser, you can work in the following areas:

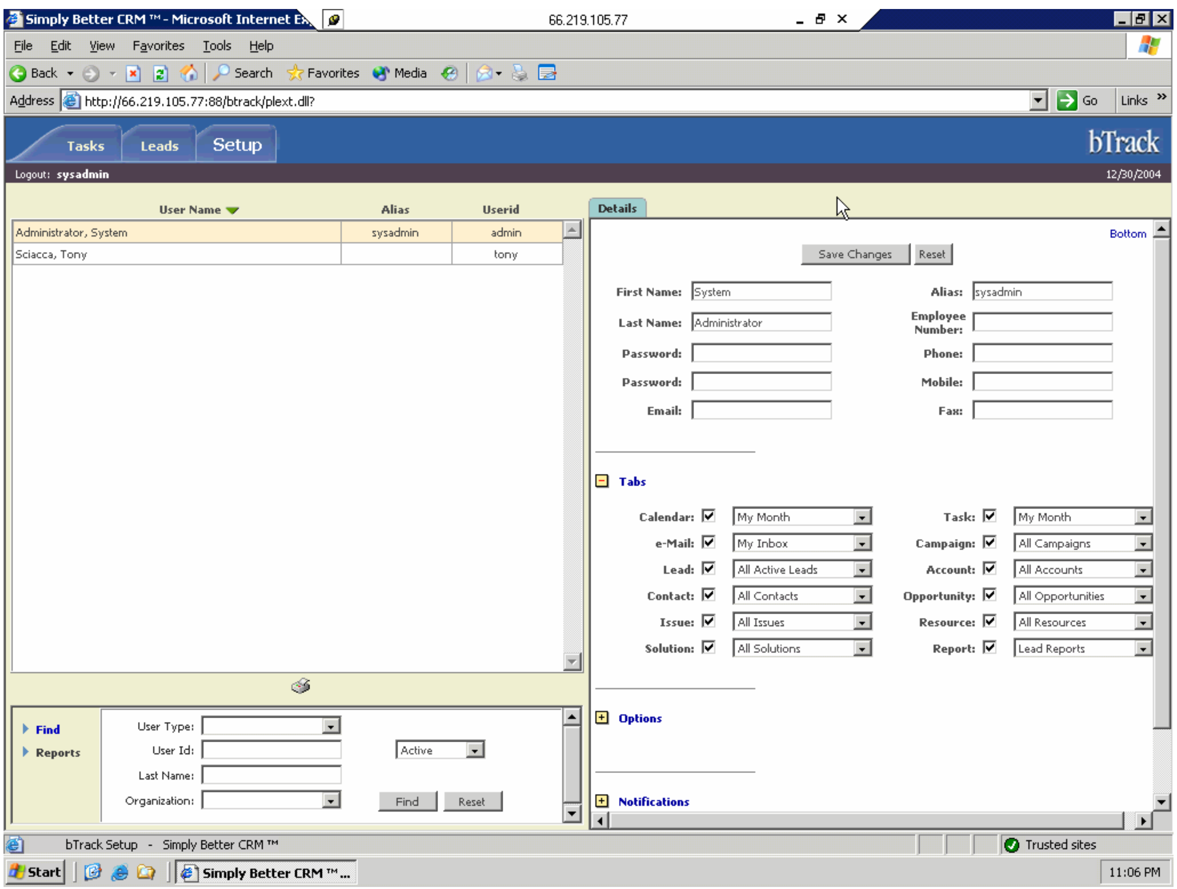
bTrack tabs	Definition
Calendar	Note appointments and reminders
Tasks	Note tasks needing to be completed
E-mail	Send and receive e-mail
Campaigns	Record information about marketing campaigns
Leads	Record responses to marketing campaigns
Accounts	List companies you work with
Contacts	List any employees you work with at each account
Opportunity	List new business potentials, including both prospects and existing clients
Issues	List any questions, concerns, or problems associated with a

bTrack tabs	Definition
	company
Resources	Record hardware inventory
Solutions	Record solutions to issues
Reports	Run reports based on database information
Setup	Access to parts of the software

THE BTRACK BROWSER SCREENS

Tabs for each area are displayed at the top of the browser screen. Note that you will only see tabs for an area if the Administrator has given you permission to access that area.

When you select a tab, a screen specific to that area is displayed. As you can see from the sample Setup screen below, each screen is divided into two areas.



The left side of the screen lists general information for that tab such as a list of accounts, a calendar for the month, or a list of users. On the bottom of this left section of the screen is an area where you can select what you want to do, such as add a new user, transfer an account, complete a task, or modify a calendar item.

The right side of the screen shows specific information about a particular item. For example, if you chose to add a new task, the right side of the Task screen would have a form for you to complete relating to that task. You would fill out the form and then click ***Submit*** to add the new task to the system.

The table below defines the uses for each of the 13 areas within bTrack:

bTracktabs	What you can do (if you have Administrator permission)
Calendar tab	• Use the drop-down box below the calendar to change the calendar view. • Click ***Add Appointment*** to add new appointments. Note that fields in red are required. • Change appointments by clicking on appointment records and then clicking on one of the modification button to the left of the drop-down menu. • Get additional information about the calendar item by clicking one of the tabs above the record on the right side of the screen. • Synchronize with your Outlook account
Tasks tab	• Use the drop-down box below the task list to change the task view. • Click ***Add Task*** to add new tasks. Note that fields in red are required. • Modify tasks by clicking on task records and then clicking on one of the modification button to the left of the drop-down menu. • Synchronize with your Outlook account
E-mail tab	• Send and receive e-mail • Synchronize with your Outlook account
Campaigns tab	• Choose a campaign view specific for your needs. • Add or update campaign records. • Get additional information about the campaign by clicking one of the tabs above the record on the right side of the screen.
Leads tab	• Add, delete, modify, convert, and transfer leads. Note that leads follow a workflow set by the Administrator, who also selects the fields that display on this form. Fields in red are required. • Get additional information about the lead by clicking one of the tabs above the record on the right side of the screen.
Accounts tab	• Use the drop-down box below the list of accounts to change the account view. • View, add, modify, and transfer accounts.

bTracktabs	What you can do (if you have Administrator permission)
	• Get additional information about the account by clicking one of the tabs above the record on the right side of the screen.
Contacts tab	• Use the drop-down box below the list of contacts to change the contact view. • Add, delete, transfer, and modify contacts. • Get additional information about the contact by clicking one of the tabs above the record on the right side of the screen.
Opportunity tab	• Add, delete, modify, and transfer opportunities. Note that opportunities follow a workflow set by the Administrator, who also selects the fields that display on this form. • Get additional information about the opportunity by clicking one of the tabs above the record on the right side of the screen.
Issues tab	• Add, delete, transfer, and modify issues. Note that issues follow a workflow set by the Administrator, who also selects the fields that display on this form. • Get additional information about the issue by clicking one of the tabs above the record on the right side of the screen.
Resources tab	• Add, delete, and modify resources that have been entered for your organization. • Get additional information about the resource by clicking one of the tabs above the record on the right side of the screen.
Solutions tab	• Add, delete, and modify solutions that have been entered for your organization. Note that these solutions will usually be attached to issues. • Get additional information about the solution by clicking one of the tabs above the record on the right side of the screen.
Reports tab	• Analyze your system information. • Select and run a built-in report. • Create your own report.
Setup tab	• Set tabs to your personal specifications by checking and unchecking items in the ***Selected Tabs*** column. • Select a default view for each tab by selecting an option from the drop-down menu in the ***Default Views*** column.