SAFE Quick Start Guide
One page only! Enough to get you started or pointed in the right direction...

1. **Site URL**
https://secure.trackerproducts.com for most users of our US based system.

2. **Logging In**
You should have received a SAFE welcome email. Follow instructions to get logged in.

3. **Support Docs (Link)**
Go to Help menu option and select 'User Guides'. Print PDF docs!

4. **User Settings**
Change basic info on your user account or setup Google MFA / change PW.

5. **Creating Offices**
If you need to segment users or data you should consider creating Offices in Settings > Offices. Create your Offices before users. If you already created users then go to Users setup area and change Office based permissions under Actions > Set Permissions.

6. **System Customization**
Go to Settings > Organization. Most of the tabs on this page control drop down values through the system.

6a. Org Settings Tab is general site setup like Case Number formatting.

6b. IP Whitelisting Tab allows you to control access to site via IP address

6c. Translation Tab allows you to change any text that is shown on the site.

6d. On Premise File Server Tab is for use with the on premise file server for media files.

7. **Custom Forms**
Settings > Forms, used to generate custom forms that come up on Case, Person or Item entry pages.

8. **Custom Forms Inclusion**
If you create custom forms go to Settings > Organization and then add these forms to your categories on the Required Case Forms or Item Required Forms tab

9. **Setting up Locations**
Each Office will need to have all your storage locations setup. Go to Settings > Storage Locations to create all your locations.

10. **Creating Users**
Go to Settings > Users and click Add. Fill in basic info and then Security groups on secondary screen.

11. **Create Case**
Go to Add > Case and create your first case. Fill in data best you can.

12. **Create Person**
After creating a Case you can add your first Person

13. **Create Item**
Now start entering an item within your Case.

14. **Run Report**
Select items entered and go to Reports option and select your report.

15. **Scanning Items**
Now that you have a barcode report go to Scan section and scan barcode.

16. **Discrepancy Report**
Go to Settings > Discrepancy Report to test your first inventory.

17. **Duplicating Item**
From any Case go to Items tab and select any item and go to Actions > Duplicate Item.

18. **Split Items**
Same as previous step but select Split Item instead of Duplicate

19. **Transactions (Check In, Out, Move, Dispose, etc)**
Same as previous step but select from the available Transactions. Then select Reports and print a Custody report.

20. **Media**
Go to Media tab within Case or Item view and click Add. Try and add Media.

21. **Reports Customization**
Don't like the way a report looks or want to change your agency / logo? Go to Settings > Report Builder and modify the HTML code.

22. **Turning on Widgets**
Go to Add Widget button on Dashboard. Add a Stats widget or any of the Org widgets

23. **Saving a Search**
Go build any search you like. Run the search to confirm you get results. Now save this search. Go back to dashboard and add the new search to new widget.

24. **Tasks**
Communicating with other users so that everything is recorded.