



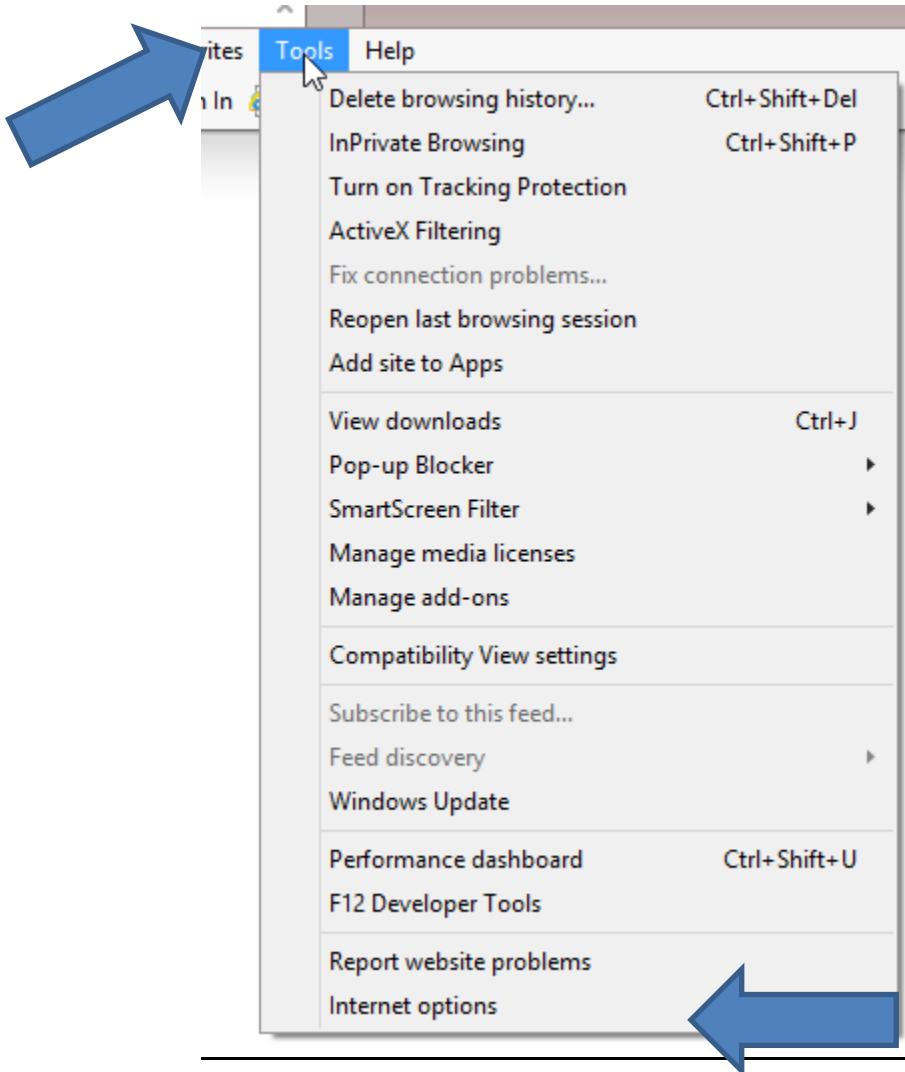
Pareto Quick Setup Guide

This guide will assist you in getting the most out of your new Pareto Platform and minimize issues you may encounter. Internet Explorer must be configured even when using a different browser (Chrome, Firefox).

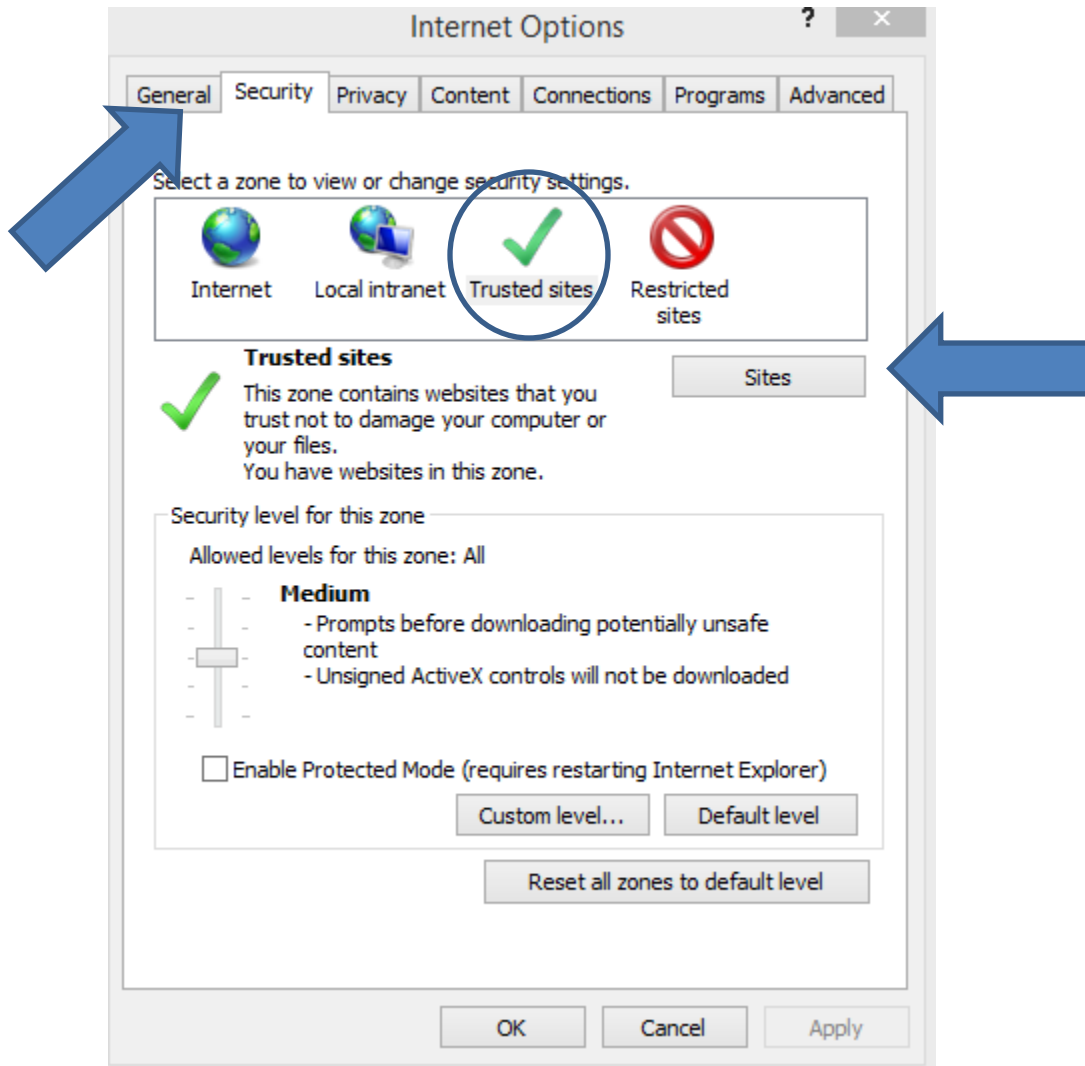
***** Before initial log in please do the following:**

Browser configuration – Trusted Sites

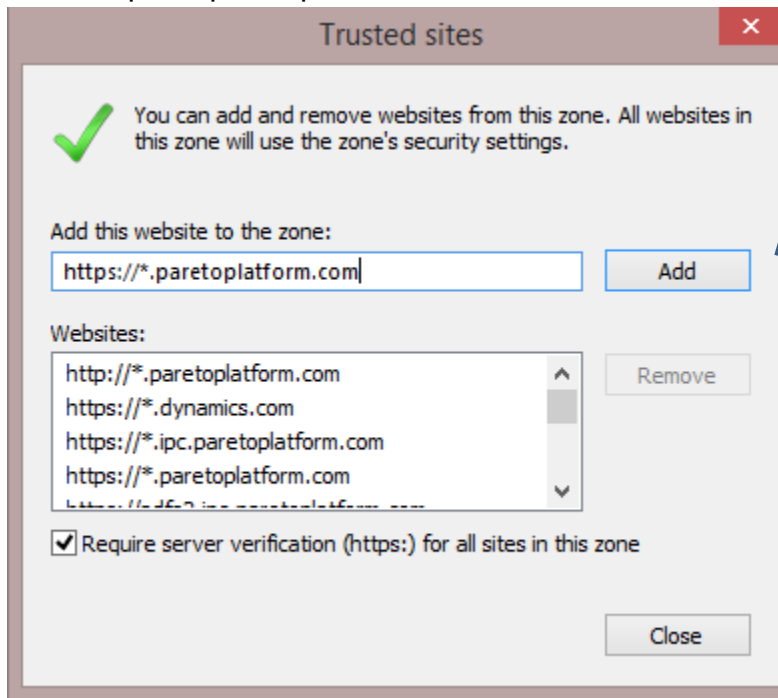
1. Go to tools=> Internet Options



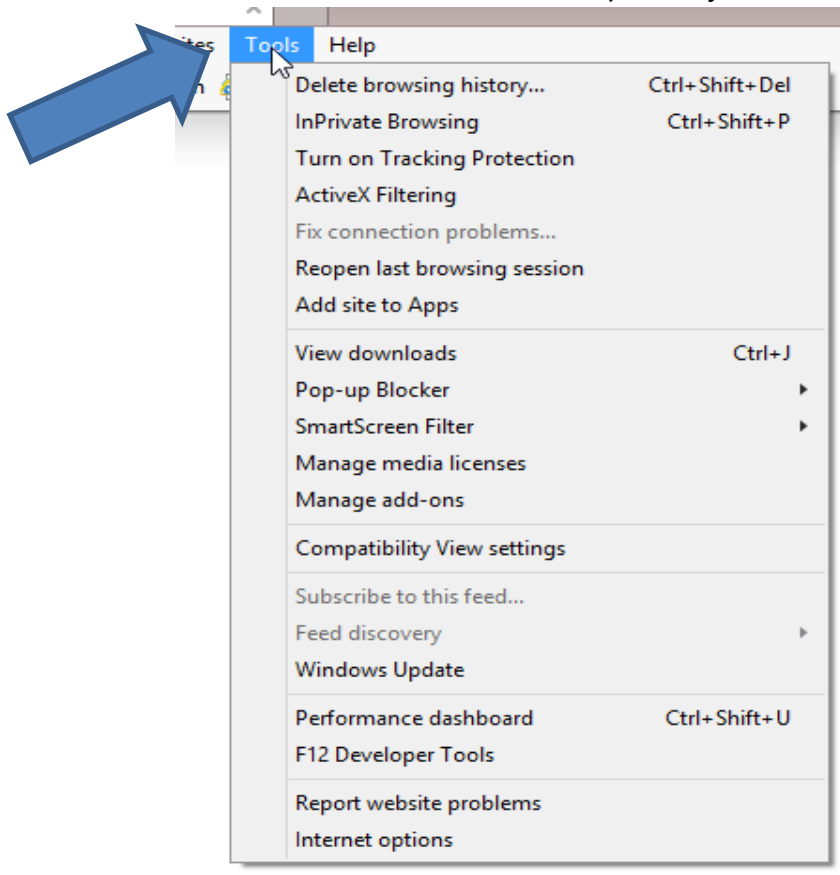
2. Click on the Security Tab, click on Trusted Sites and then click on the Sites button.



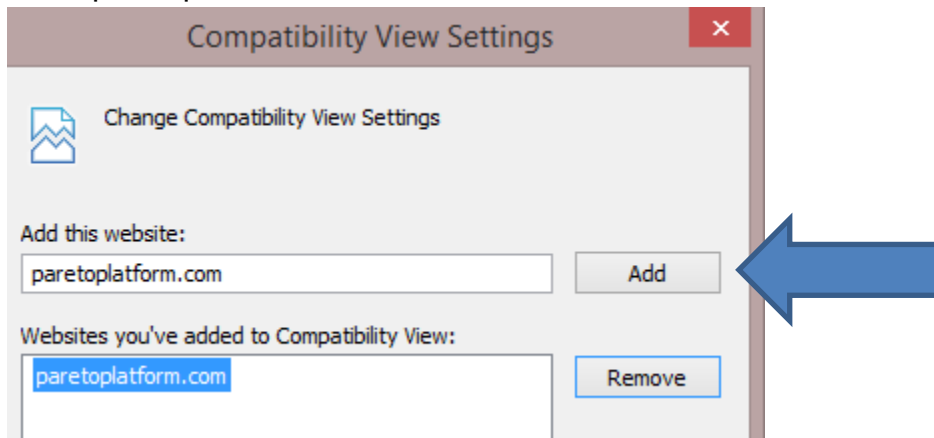
3. Enter `https://*.paretopplatform.com` into the text box and click Add.



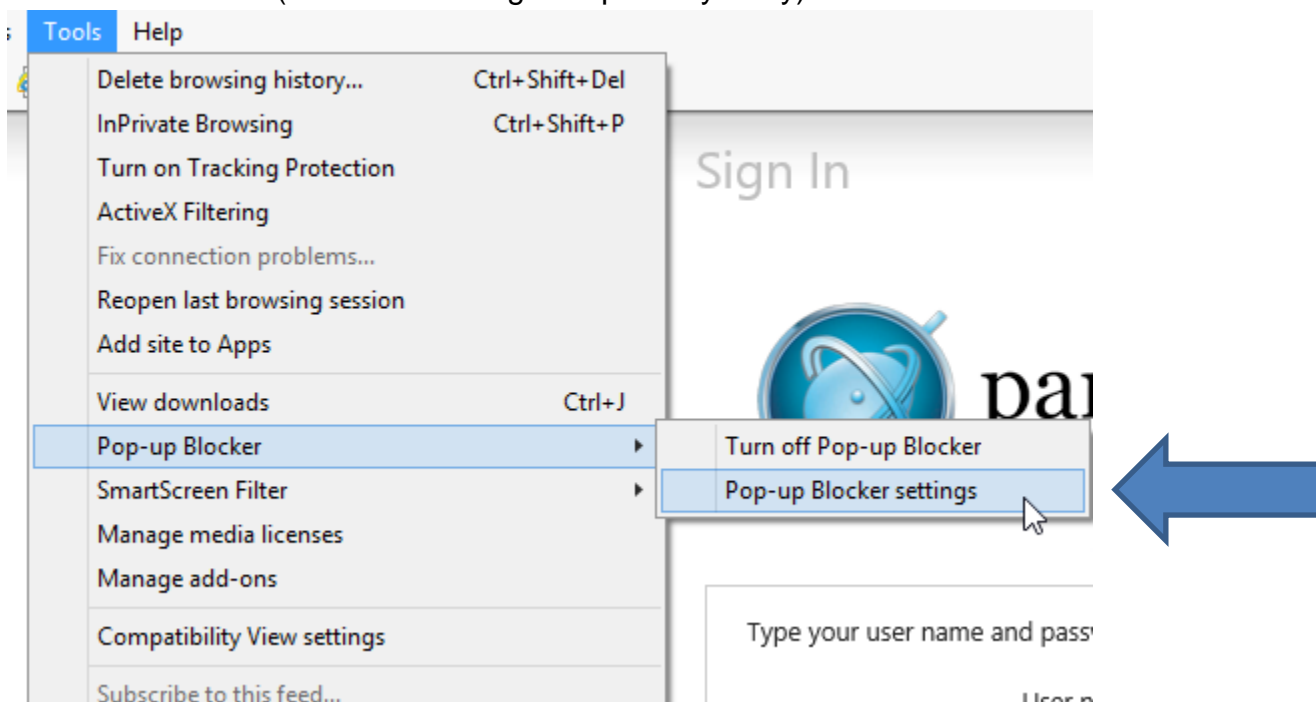
4. Close the trusted sites box and exit internet options.
5. Click on tools and select "Compatibility View Settings"



6. Enter `paretoplatform.com` into the text box and click Add.



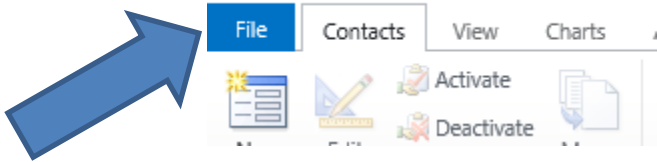
7. Close the Compatibility View Settings box. Click on tools, hover pointer on pop-up blocker and select pop-up blocker settings. Add `paretoplatform.com` in the text box and click Add. (Similar to adding Compatibility entry)



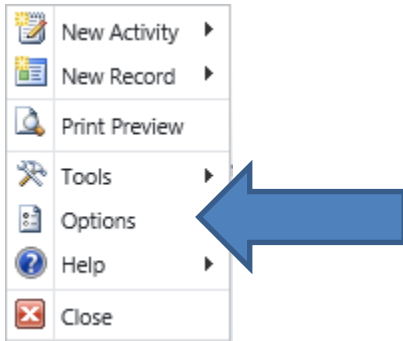
You can now log into the Pareto Platform for the first time. You will be prompted to sign the User Agreement as well as change your password. Please take note of the minimum password requirements. Once logged in, you will need to ensure your time zone and default currency are configured correctly.

CRM Options Configuration

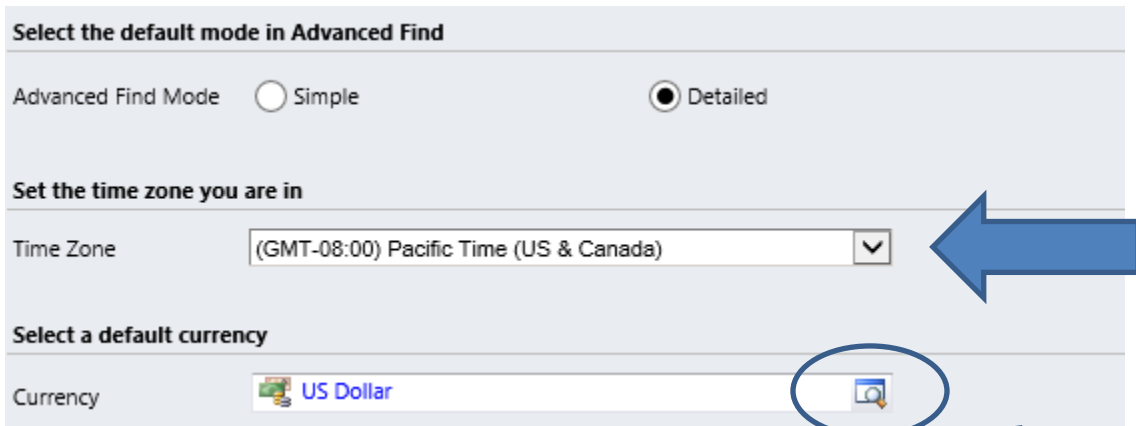
1. Click on the blue “File” tab on the upper left side of the CRM screen.



2. Select options from the drop down menu



3. From the next screen, uncheck “Show Get Started panes on all lists”, select your Time zone and select default Currency from the lists provided.



4. Click OK to save the changes.