
RUNNING TRUST FROM YOUR WEBSITE

INTRODUCTION

TRUST is a powerful web-based application that gives organizations the ability to assess the needs of their clients in a variety of service areas. As soon as TRUST was launched and early adopters of the product came on board, the simple question was asked: ***Can we run TRUST from our website?***

Well, you asked and we listened. TRUST can now be run from your corporate website! Additionally, our new configuration offers the ability for users to create their own TRUST client accounts on the fly. And to take it one step further, it also allows member organizations to brand components of TRUST to correspond with their corporate image.

This powerful combination of features means that with less effort you can better serve your clients and prospects. As you can tell, we are excited about this offering and delighted that you've chosen to take TRUST to the next level!

PROCESS

Setting up TRUST to run on your website is a straightforward process.

- Step 1)** You choose the TRUST templates that you want to offer on your website, and create web pages that present them to your clients and prospects. Sample pages are included in appendix 1 of this document.
- Step 2)** Proactive Accountants Network's technical team can assist you and your web team if required to configure the pages on your website from which the assessment will be hosted. Appendix 2 of this document includes key codes that you will use when configuring TRUST's Account Creation and Login pages to run on your site.
- Step 3)** Quality Assurance is performed by both teams before we go live to ensure that every technical and design component is working as expected.

ARCHITECTURE

The key to running TRUST from your web site is the Inline Frame (IFRAME) html element. The IFRAME element functions as a document within a document; in our case this translates directly to the TRUST assessment within a web page on your site.

Two 'pages' within TRUST have been designed specifically to be hosted:

ACCOUNT CREATION

(renewtrust.com/client/newClient.aspx)

The account creation page supports the creation of TRUST user accounts directly from your site. The page requires a query string that includes a single attribute-value pair named "tx." This item uniquely identifies your firm and the TRUST assessment that will be served up to the user.

This example shows how to display the TRUST Account Creation page within an IFRAME:

```
<iframe src="https://www.renewtrust.com/client/newClient.aspx?tx=templateCode"
style="POSITION: absolute; TOP: 160px; HEIGHT: 78%; WIDTH: 100%;" frameborder="no" />
```

As the Account Creation pages are template specific, you will need to create distinct Account Creation for each of your templates. For example, if on your site you wish to host two assessments, **Individual** and **Business**, you will need to create two Account Creation pages; one containing an IFRAME that references the Individual template and one containing an IFRAME that references the Business template.

TRUST LOGIN

(renewtrust.com/client/login.aspx)

The Login page supports direct login to TRUST for users that already have a username and password. This page requires a query string that includes a single attribute-value pair named "fx" which uniquely identifies your firm.

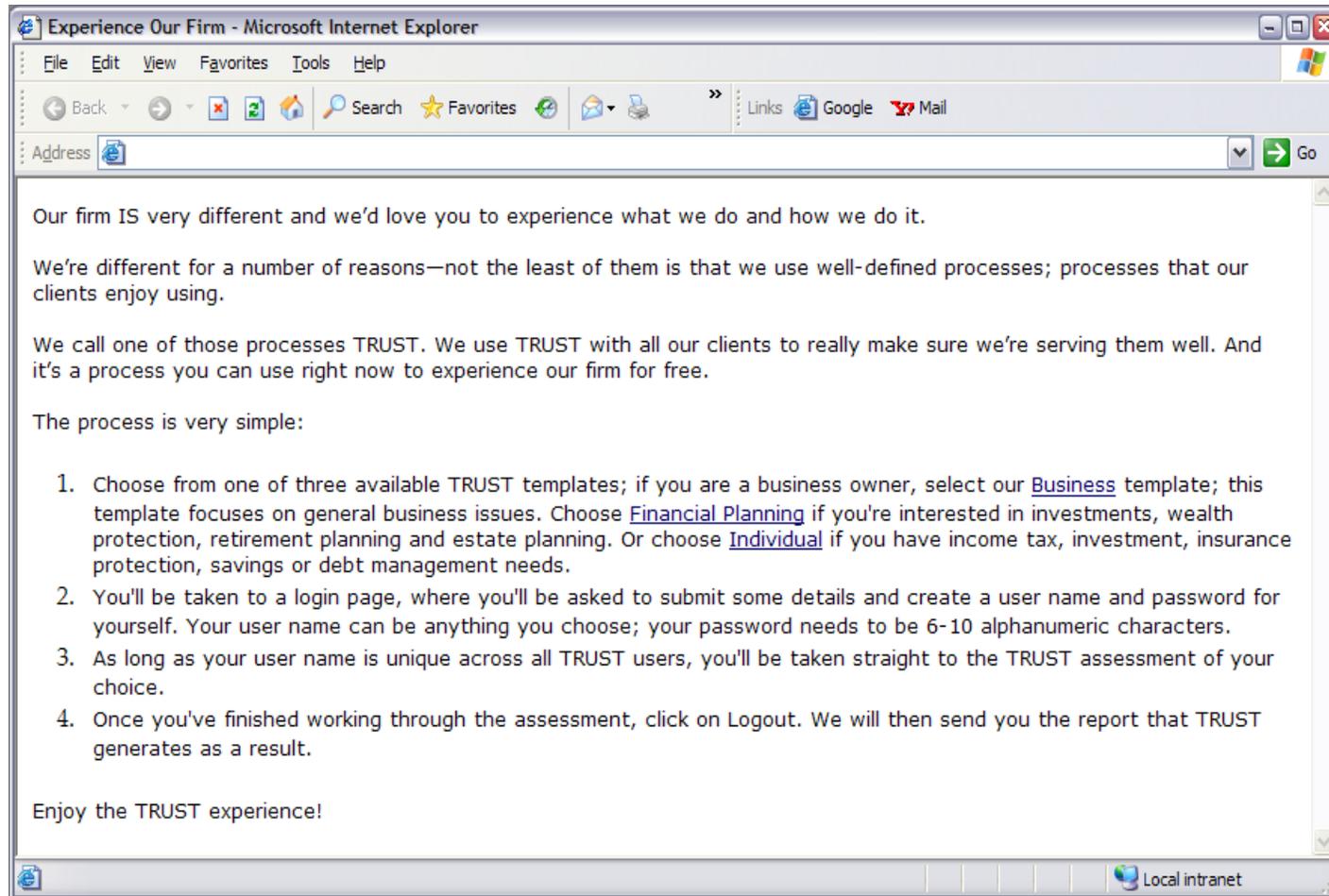
This example shows how to display the TRUST Login page within an IFRAME:

```
<iframe
src="https://www.renewtrust.com/client/login.aspx?fx=firmCode"
style="POSITION: absolute; TOP: 160px; HEIGHT: 78%; WIDTH: 100%;"
frameborder="no" />
```

APPENDIX 1: SAMPLE PAGES

The following samples illustrate a basic configuration for hosting TRUST on your website.

SAMPLE 1: LISTING FIRM TEMPLATES





SAMPLE 1: HTML SOURCE

```
<html>
  <head>
    <title>Experience Our Firm</title>
  </head>
  <body>
    Our firm IS very different and we'd love you to experience what we do and how we
do it.

    <BR><BR>
    We're different for a number of reasons—not the least of them is that we use
well-defined processes; processes that our clients enjoy using.
    <BR><BR>
    We call one of those processes TRUST. We use TRUST with all our clients to
really make sure we're serving them well. And it's a process you can use right
now to experience our firm for free.
    <BR><BR>
    The process is very simple:<BR>
  <ol>
    <li>
      Choose from one of three available TRUST templates;
      if you are a business owner, select our <a href="/business.htm">
Business</a> template; this template focuses on general business issues.
Choose
      <a href="/financial_planning.htm">Financial Planning</a>
      if you're interested in investments, wealth protection, retirement
planning and
      estate planning. Or choose <a href="/individual.htm">
Individual</a> if you have income tax,
investment, insurance protection, savings or debt management needs.<BR>
    <li>
      You'll be taken to a login page, where you'll be
yourself.
      asked to submit some details and create a user name and password for
      Your user name can be anything you choose; your password needs to be 6-
10
      alphanumeric characters.<BR>
    <li>
      As long as your user name is unique across all TRUST users,
      you'll be taken straight to the TRUST assessment of your choice.<BR>
    <li>
      Once you've finished working through the assessment, click on Logout. We
will
      then send you the report that TRUST generates as a result.
    </li>
  </ol>
```



PANALITIX



TRUST

Enjoy the TRUST experience!

```
</body>  
</html>
```



SAMPLE 2: ACCOUNT CREATION PAGE

Business Template - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Links Google

Address <http://localhost/Trust/> Go

TRUST Business Template - Create your TRUST Login

* Your Email:

* Confirm Email:

First Name:

Last Name:

Business Name:

* User Name:

* Password:

* *REQUIRED FIELD*

Already have a Login for this assesment?
[Click Here](#) to resume your TRUST session.

Done Unknown Zone (Mixed)

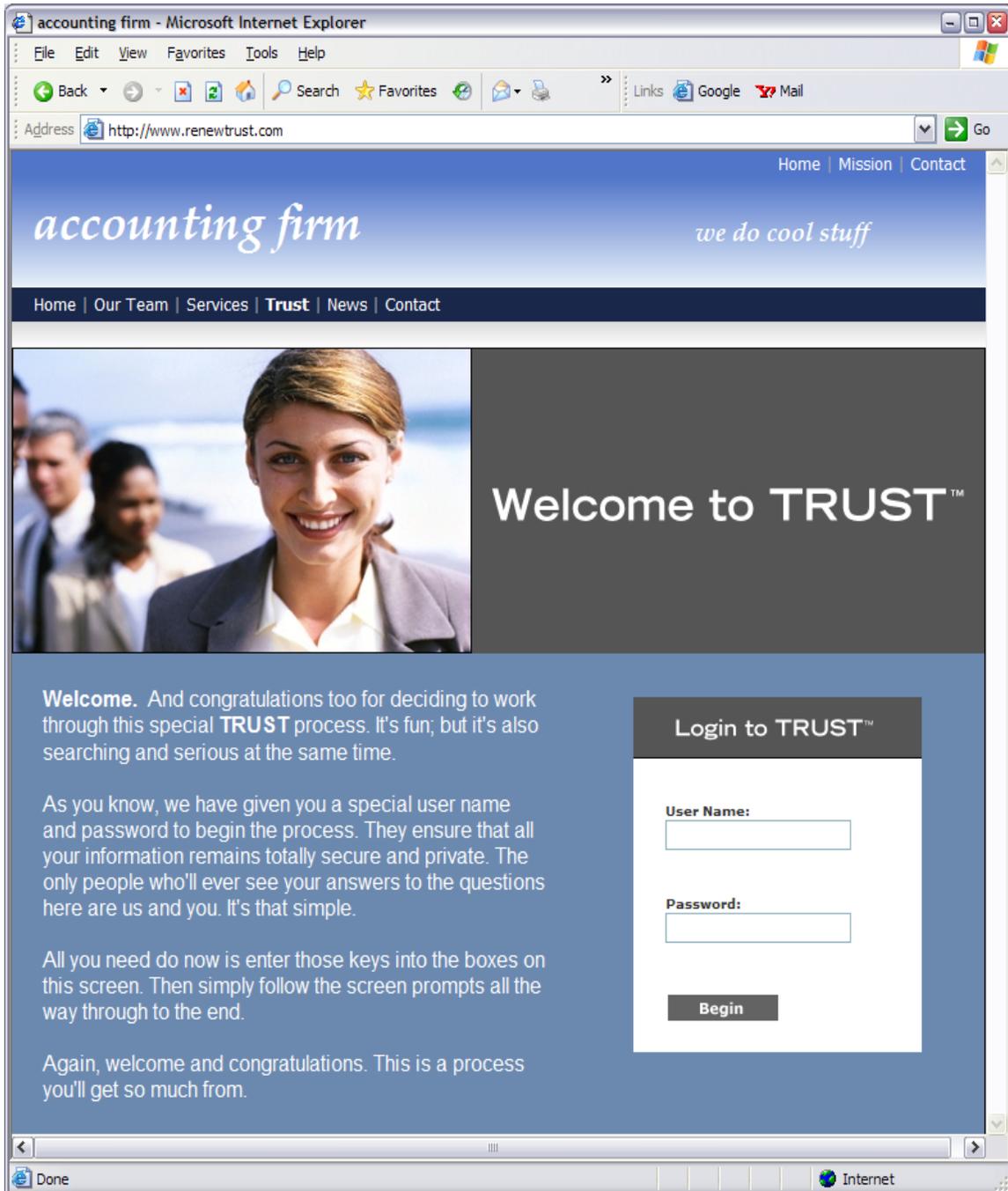


SAMPLE 2: HTML SOURCE

```
<html>
  <head>
    <title>Business Template</title>
  </head>
  <body>
    <div align="left">
      <table border="1" cellpadding="3" cellspacing="0" bordercolor="#cbccce"
        width="99%" height="99%" style="BORDER-COLLAPSE: collapse">
        <tr>
          <td>
            TRUST Business Template - Create your TRUST Login
          </td>
        </tr>

        <tr height="100%">
          <td width="796" height="100%" valign="top">
            <br>
            <iframe style="WIDTH: 100%; HEIGHT: 78%"
              src="https://www.renewtrust.com/client/newClient.aspx?tx=1000"
              frameborder="no" />
          </td>
        </tr>
      </table>
    </div>
  </body>
</html>
```

SAMPLE 3: LOGIN PAGE



SAMPLE 3: HTML SOURCE



```
<HTML>
  <HEAD>
    <title>accounting firm</title>
    <meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
    <meta content="http://schemas.microsoft.com/intellisense/ie5"
name="vs_targetSchema">
  </HEAD>
  <body bgColor="white" leftMargin="0" topMargin="0">
    <form id="mainform" method="post" runat="server">
      <TABLE id="TopTable" cellSpacing="0" cellPadding="1" width="760" border="0"
height="144">
        <TR bgColor="#5175c9" height="18">
          <TD style="PADDING-RIGHT: 16px" width="50%" colSpan="2">
            <P align="right"><FONT style="PADDING-LEFT: 16px" face="Tahoma"
color="#ffffff" size="2">Home
              <FONT color="darkgray">|</FONT>&nbsp;Mission&nbsp;<FONT
color="darkgray">|</FONT>
              Contact</FONT></P>
          </TD>
        </TR>
        <TR bgColor="#5175c9" height="100">
          <TD style="PADDING-
LEFT:16px;FILTER:progid:dximagetransform.microsoft.gradient(startcolorstr='#5175C9',en
dcolorstr='#E8F1FA', gradienttype='0');WIDTH:388px;PADDING-TOP:8px;BORDER-BOTTOM:white
1px solid;HEIGHT:80px"
            vAlign="top" width="85%">
            <P style="FONT-WEIGHT: bold; FONT-SIZE: 28pt; COLOR: white; FONT-
STYLE: italic; FONT-FAMILY: 'Palatino Linotype', 'Times New Roman'">accounting
firm</P>
          </TD>
          <TD
style="FILTER:progid:dximagetransform.microsoft.gradient(startcolorstr='#5175C9',endc
olorstr='#E8F1FA', gradienttype='0');BORDER-BOTTOM:white 1px solid;HEIGHT:80px"
width="15%">
            <P style="FONT-WEIGHT: bold; FONT-SIZE: 14pt; COLOR: white; FONT-
STYLE: italic; FONT-FAMILY: 'Palatino Linotype', 'Times New Roman'">we do cool
stuff</P>
          </TD>
        </TR>
        <TR bgColor="#18274a" height="18">
          <TD colSpan="2" height="24"><FONT style="PADDING-LEFT: 16px"
face="Tahoma" color="#ffffff" size="2">Home
            <FONT color="darkgray">|</FONT> Our Team&nbsp;<FONT
color="darkgray">|</FONT> Services&nbsp;<FONT color="darkgray">|</FONT>
            <STRONG>Trust</STRONG>&nbsp;<FONT
color="darkgray">|</FONT>&nbsp;News&nbsp;<FONT color="darkgray">|</FONT>
            Contact</FONT></TD>
        </TR>
      </TABLE>
    </form>
  </body>
</HTML>
```



```
<TR height="18">
  <TD
style="FILTER:progid:dximagetransform.microsoft.gradient(startcolorstr='#dcdcdc',endcolorstr='white', gradienttype='0')"
width="100%" colSpan="2"></TD>
</TR>
</TABLE>
<iframe src="https://www.renewtrust.com/client/login.aspx?tf=65805"
style="WIDTH:760px; POSITION:absolute; TOP:144px; HEIGHT:78%" scrolling="no"
frameBorder="no"></iframe>
</form>
</body>
</HTML>
```




APPENDIX 2: KEY CODES

Firm Name	Firm Code
EASE Business Services	512107

Template Name	Template Code
2014 PAN Business Improvement	11490301
2014 PAN Financial Planning or HNWI	11490602
2014 PAN Succession Planning	11490903
2014 PAN Virtual Management Accounting	11491204