

#### **FIRST STEPS**

# Welcome to SURE

Secure Login & 2FA Activation Guide

### **Step 1: Check Inbox**

Start the process by locating your invitation.

Search for email subject: "Your new account on

SURE"

Open the email and click the unique **activation** 

link.

This will redirect you to the secure login portal.

#### no-reply@staysure.ch

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Hello Christian,

A new account has been created for you for on SURE by Christian Trunz.

To set your password and activate your account, please click the following link: http://staging.staysure.ch/setup?sesame=AAAACwsTLy9TkfnJw9jfcXy8&email=christian.trunz%40gmail.com

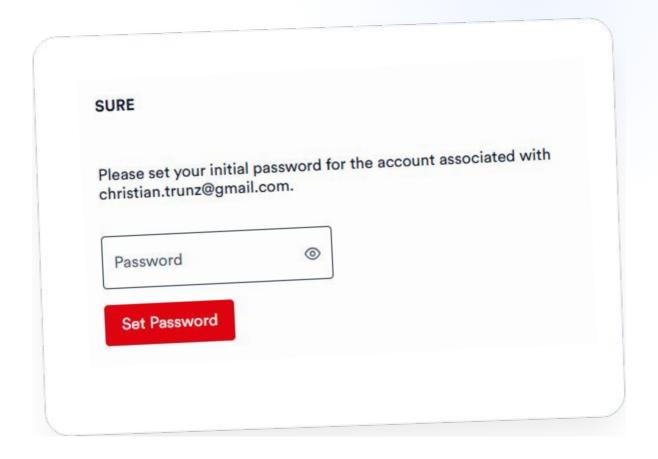
## Step 2: Set Password

Secure your account with a strong credential.

Enter a new **secure password** in the top field.

Repeat the password to confirm.

Click "Set Password" to proceed to 2FA setup.



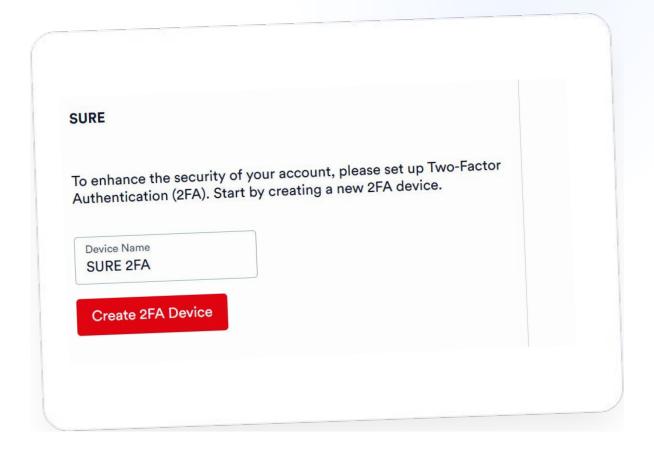
### Step 3: Activate 2FA

Two-Factor Authentication is mandatory for your security.

Locate the 2FA section.

Click the button: "Create 2FA Device".

A unique **QR Code** will appear on your screen.



### Step 4: Get the App



Google Authenticator

Download from Google Play Store or Apple App Store



Microsoft Authenticator

Download from Google Play Store or Apple App Store

# Step 5: Scan & Verify

Open your authenticator app.

Tap "Scan QR Code" and point camera at

screen.

Enter the **6-digit code** generated by the app.

Click "Verify" to finish.

### Step 6: Finalize & Go to Home

#### 2FA setup is complete!

Generate backup codes (highly

recommended).

Click the red button: "Go to Home".

You will be redirected to the main

dashboard.

#### SURE

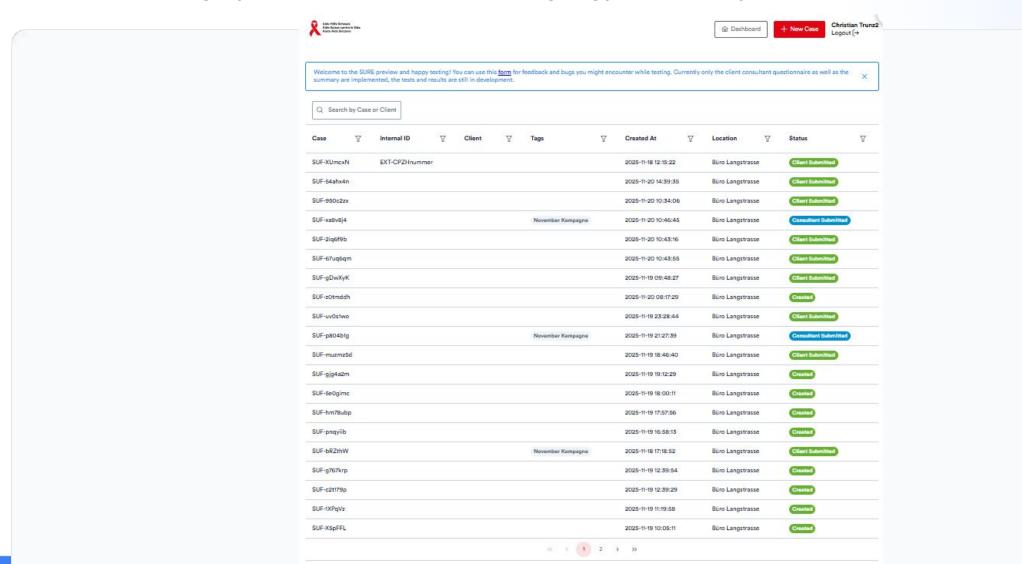
2FA setup is complete! Generate backup codes to ensure you can access your account if you lose your 2FA device.

**Generate Backup Codes** 

Go to Home

### **Step 7: Dashboard Overview**

After a successful login, you will see the main dashboard, giving you access to your cases and data.

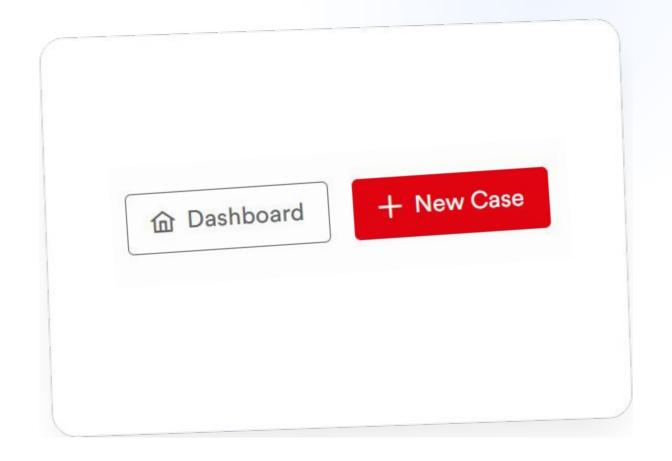


# **Step 8: Start New Case**

To create a new entry, click the button in the action bar.

Click the + New Case button.

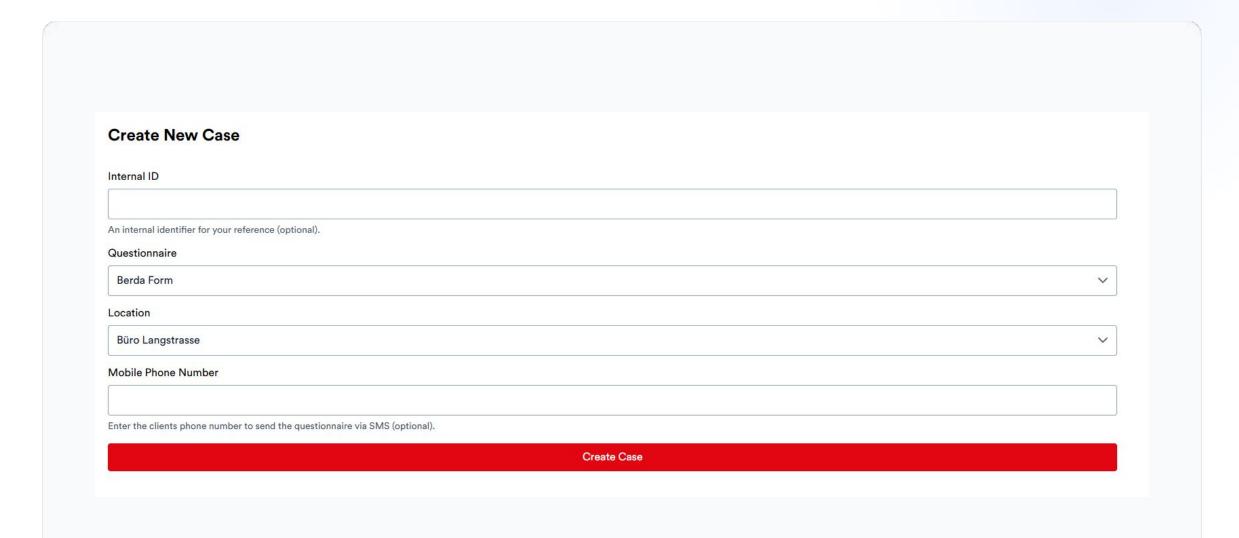
This will open the "Create New Case" form.



\*\*Note:\*\* Entering the mobile phone number does not currently trigger an SMS. The feature will be activated later.

### **Step 9: Create Case Form**

Fill out the form details to initiate a new case:



### **Step 10: Case Created & Client Access**

After creation, you will see the confirmation screen with options for client access:

The automatic send function is currently \*\*inactive\*\*.

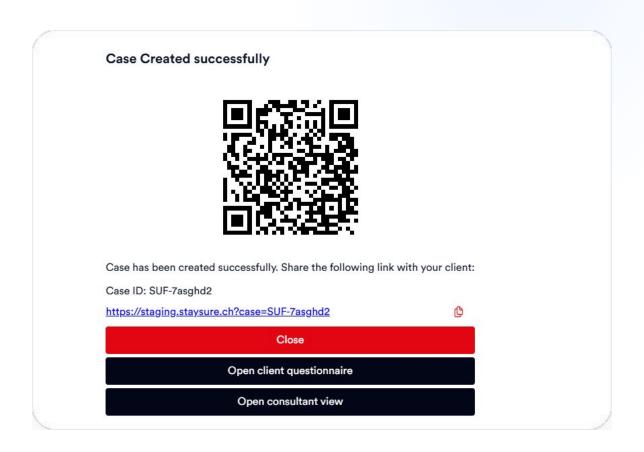
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Open Questionnaire: Click "Open client

questionnaire" to view the form yourself or start the consultation.

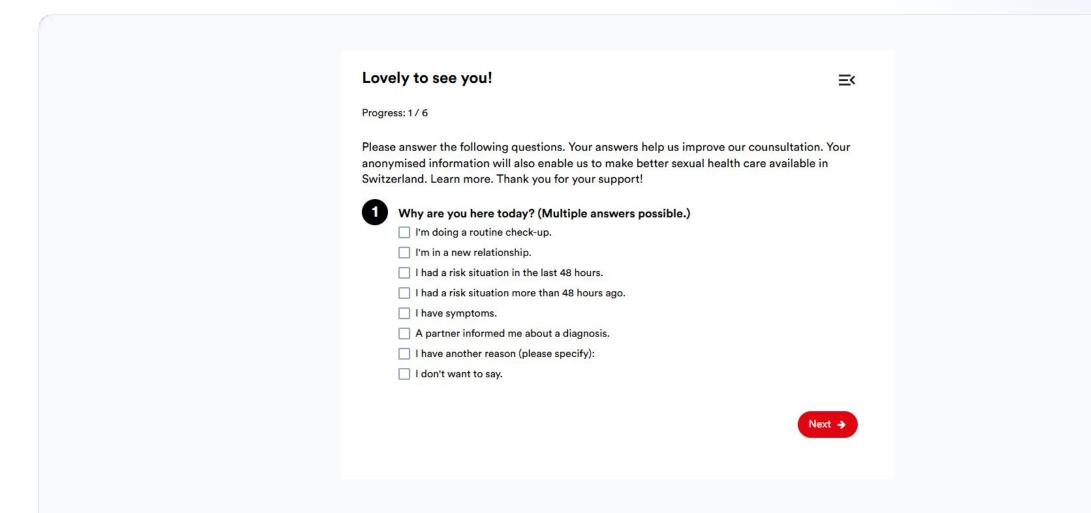
Click "Open consultant view" for your internal

case summary.



### **Step 11: Client Questionnaire**

This is the view the client sees when accessing the questionnaire link. Proceed through the questions by clicking "Next".



\*\*Summary:\*\* The left column provides essential case details. The main area is for documenting and confirming the consultation content.

### **Step 12: Consultant View & Documentation**

This view is used by the consultant to review the client's answers and document the topics covered during the consultation.

