KEYLOCK
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Lend Securely. Evaluate Completely.

Admin Quick Start User's Guide

http://keylocksolutions.com/

Contents

Introduction to KeyLock Solutions Admin User's Guide

Our emphasis is to ensure efficient workflow with the goal of quality rural real estate valuation products for managing workflow tasks related to appraisals, appraisal review, and evaluations.

Visit our web site at www.keylocksolutions.com to begin:

For questions contact:

Zac Moore, MAI, CSO

KeyLock Solutions, Sales

509-778-3332

zac@keylocksolutions.com

Guide for Organization's Administration Account

Every New Organization signup is provisioned two accounts: an administration account and one user account. The administration account user name is always **Admin@your organization's name**.

KeyLock Affiliate accounts have the option of KeyLock administering the account, or the new organization administering their own account. KeyLock Affiliates should discuss and agree upon who will be administering the account prior to signing up.

This guide explains the administration process of adding new users, new organizations, and setting account privileges. We recommend setting up roles and rules for your organization that identifies specific permissions for those roles.

Login Screen (first login takes longer, so be patient while login is loading)

To Log In…

Use your **Admin@organization'sname** and **Password** emailed to you by KeyLock Solutions. After a successful login, you can change your password to something more user-friendly and easy to remember, or change administrator to someone else in the organization under **Basic Information**.

In this User Guide example, we are using a demonstration organization we have named Farm Land Investments. The user name is Admin@FarmLandInvestments.

After a successful login, you will see this screen. You can **click** here to change the Administrator's name and email under Basic Information, contact information, password, or account.

Upon signing up, the new organization will have one user, in this case, John Harvester, and an admin account, who, in this case, is also John Harvester because he is the one who originated the organization's KeyLock account. The administrator can now add additional users. This will be explained later in this guide. If the account is a freemium non-affiliate account, adding new users will prompt the organization to enter payment information. If the account is an Affiliate account, KeyLock Solutions will bill direct.

To Change Your Profile…

Click on your User Name in upper right hand corner. In the dropdown list, select Profile. You will see this screen. If the organization chooses to change administrators, do it in **Basic Information** shown in the screen below:

Fill out Administrator's Contact Information:

To Set a New Password that Suits You…

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Farm Land Investments

Admin@FarmLandInvestments,Administrator ▼

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Login ID: Admin@FarmLandInvestments

Basic Information
Contact Information
Password Settings
Account

Close Profile

Password:
[   ] ⊕

Confirm your password:
[   ] ⊕

Change Password

« Previous

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To Set Up Admin Account Permissions…

Next, create the administrator's account settings by clicking on Account. Account set-up default allows administrators to have ALL allowable permissions. From here, the Organization's Administrator can carry out all permissioned administrative tasks checked in the following list. Note: you can add additional administrator users at no additional cost. They will be limited to administrative privileges only, and limited to those privileges granted by the head administrator.

Also, the organization's administrator can give comp data base and evaluation users administrative privileges. Again, for this reason, it is a good idea to set up your organization's user roles and privileges.

Modules:

Admin

- ✔ Transfer record(s) ownership
- ✔ Activate/De-activate user
- ✔ Change users permissions
- ✔ Change users passwords
- ✔ Change users contact information
- ✔ Create user
- ✔ View suborganization profile
- ✔ Change organization contact information
- ✔ Suspend organization account
- ✔ Activate organization account
- ✔ Cancel organization account
- ✔ Organizations
- ✔ Users
- ✔ Get statistics on record ownership.

Save Account

When you are finished with setting up the Administrator's Profile, **click** Save Account and Close Profile. You will now be back to the home screen.

To Edit a User's Account…

To edit an existing user's account, it's similar to the Administrator's process; **click** on the user's Name or Username. The administrator can edit the user's contact information, password, and account settings (permissions). All new users' accounts default to full permissions when they are set up. Again, it is a good idea to have company policy that identifies roles and user's permissions for those roles. For example, giving all users permission to delete anyone's records within the organization, or transfer anyone's records to another user, is likely a poor administrative idea.

Be mindful of the list of permissions and set them accordingly.

Users are, by default, granted the following permissions, if not unselected by the administrator:

☑ **Comparables**

☑ Transfer ownership of comparables within the organization
☑ Add collaborators to my comp
☑ Delete comparable record owned by other users in the same organization
☑ Delete comparable record owned by user
☑ Save comparable as community record
☑ Save comparable as local record
☑ Save comparable as private record
☑ Add collaborators to comparables within the organization
☑ Generate pdf reports
☑ Upload documents
☑ Add collaborators
☑ Generate excel reports
☑ View comparable
☑ Save comparable
☑ New Record
☑ Backlog
☑ New Search
☑ Saved Searches
☑ Search Criteria

☑ **Valuations**

☑ Delete evaluation record owned by other users in the same organization
☑ Delete evaluation record owned by user
☑ Transfer ownership of evaluations within the organization
☑ Delete evaluation record owned by other users in the same organization.
☑ Create new evaluation report
☑ Save evaluation
☑ Evaluation
☐ Appraisal
☐ Appraisal Review

When the administrator is finished selecting permissions for the user, Save Account settings:

If an organization's administrator is disabling a user's account, transfer records to a new User first. This is discussed on pages 16-17.

[Save Account] [Disable Account]

Adding a New Us⋯

Click on Organization

Farm Land Investments   Admin@FarmLandInvestments,Administrator ▾

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Farm Land Investments

Organizations   Users

⟳ Active Organizations   ⊗
•   Farm Land Investments
⟳ Canceled Organization Accounts
⟳ Suspended Organizations

Click on Organization Name and then on **Users**. You will see this screen.

Farm Land Investments   Admin@FarmLandInvestments,Administrator ▾

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Farm Land Investments

Organizations   Users

Organization Profile: Farm Land Investments, ID: 55   ⊗

		Id	Name	Username	Prof. Title	Record Ownership
Organization Information						
Suborganizations		97	John Harvester	Farm Land		• Evaluation : 2
Accounts						Remove
Users		96	John Harvester	Admin@FarmLandInvestments		

Status: active
Suspend Account
Cancel Account

Add new user

Click on Add new user

Fill out the form below, then next to select desired package for new user, user role, and user privileges. If you need to go back, **click** on **Organization** or **Users** link under Organization tab to revert back to whichever screen you'd like to return to.

Farm Land Investments

Organizations   Users

Username:

Email:

First Name:

Last Name:

Address:

Address 2:

City:

State:

Zip Code:

Mobile Phone Number:

Selecting User Package, Role, and Privileges…

Page two of the new user setup form looks like this:

Organizations   Users

Package: [▼]

[   ]

Role: [Role name   ]

[Role description

]

Select the package from the dropdown list. If you have questions about packages and prices, you can review these on KeyLock Solution's web site at www.keylocksoltuions.com or call us.

Only privileges for the package selected will appear under Modules. i.e. If Client Affiliate Package is selected, Comparables and Evaluation privileges will show in the modules. If Appraiser Affiliate is selected, only Comparables privileges will show.

Additionally, if an administrator wants this user to have Administrative privileges, they can click on Admin box and select admin privileges.

Click on [Back] [Subscribe]   **Subscribe** at the bottom when finished.

Adding a New Sub-Organization...

Only non-affiliate accounts and KeyLock Solutions can add sub-organizations.

To add a new organization, from the Admin screen, click on Organizations, then Click on Create New Organization
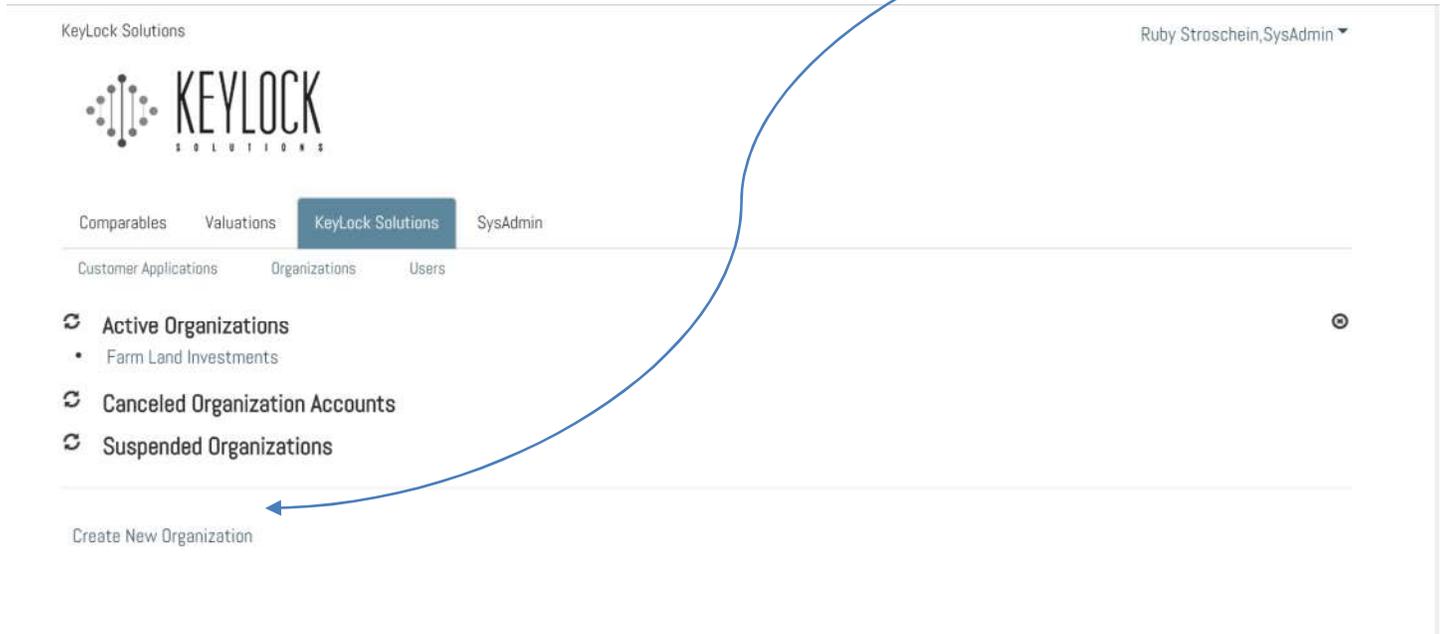
Fill out the form as shown on the following page. If the primary organization is going to maintain administrative oversight of sub-organizations, uncheck the box at the bottom of the form before creating a new tenant (sub-organization). If the new sub-organization has full administrative oversight of their account, check the box at the bottom of the form to create an administrator for the new sub-organization.

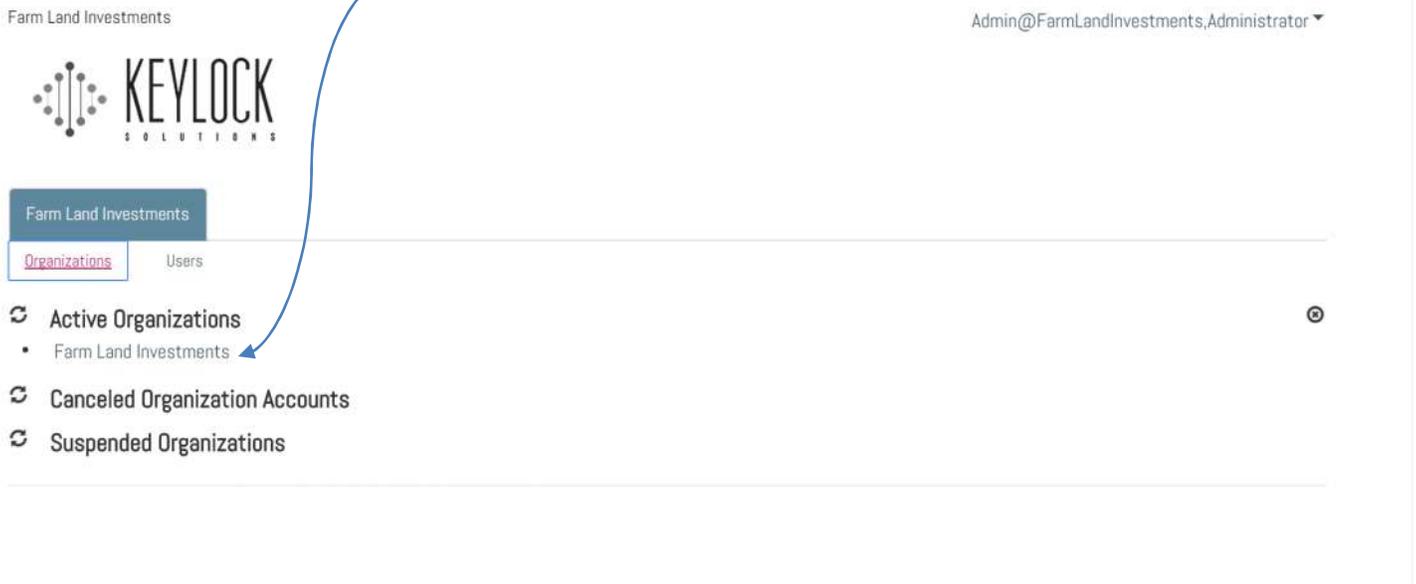Create new organization:

Name:

Address1:

Address2:

City:

State

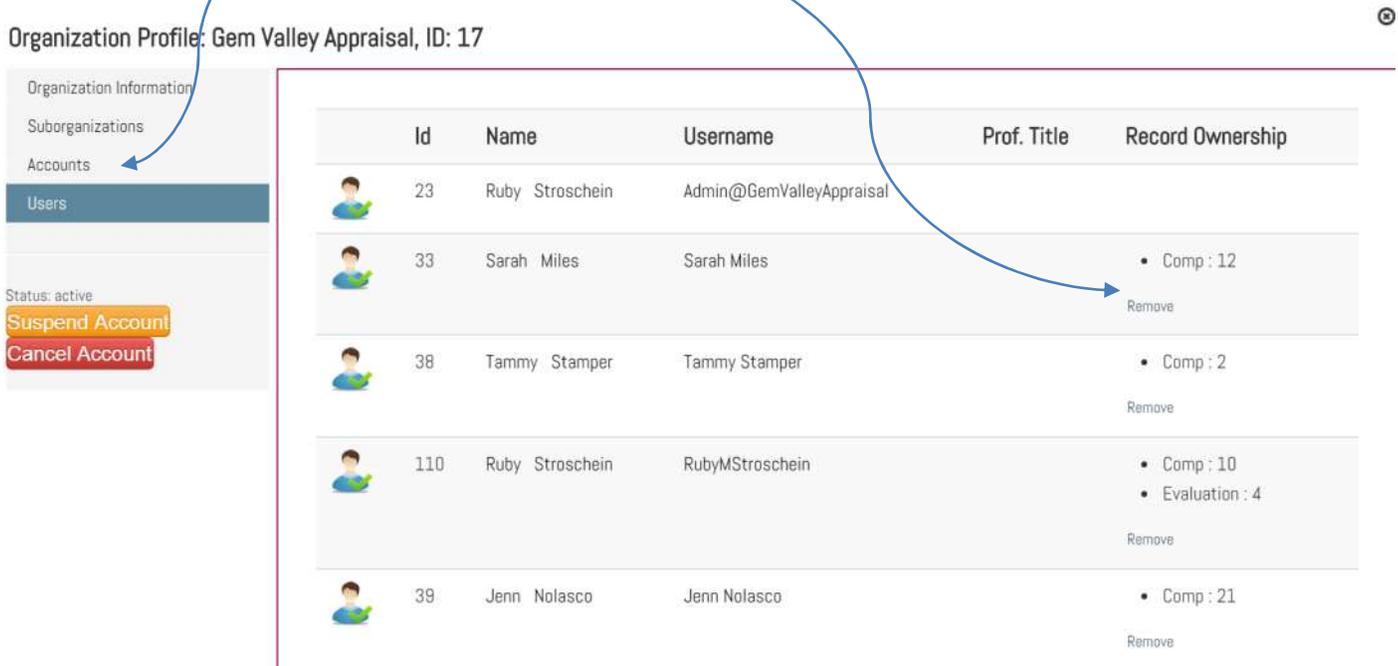[dropdown ▼]

Contact E-mail:

Contact Person:

☑ Create administrator user for this organization so they can create their own users and possibly suborganizations.

Create new tenant Back

Transferring Records to a New User…

The administrator can transfer all records of a suspended or canceled user within the organization by clicking on the name of the organization

Farm Land Investments   Admin@FarmLandInvestments,Administrator ▼

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Farm Land Investments

Organizations   Users

⟳ Active Organizations   ⊗
   •   Farm Land Investments

⟳ Canceled Organization Accounts

⟳ Suspended Organizations

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To get to this screen, **Click** on **Users**, then **Click** on **Remove** below the **Record Ownership** statistics

Organization Profile: Gem Valley Appraisal, ID: 17   ⊗

Organization Information

Suborganizations

Accounts

Users

Status: active
Suspend Account
Cancel Account

	Id	Name	Username	Prof. Title	Record Ownership
👤	23	Ruby Stroschein	Admin@GemValleyAppraisal		
👤	33	Sarah Miles	Sarah Miles		• Comp : 12 Remove
👤	38	Tammy Stamper	Tammy Stamper		• Comp : 2 Remove
👤	110	Ruby Stroschein	RubyMStroschein		• Comp : 10 • Evaluation : 4 Remove
👤	39	Jenn Nolasco	Jenn Nolasco		• Comp : 21 Remove

This popup screen gives a dropdown menu of all users in the organization. Select the user who will be receiving the records and click OK.
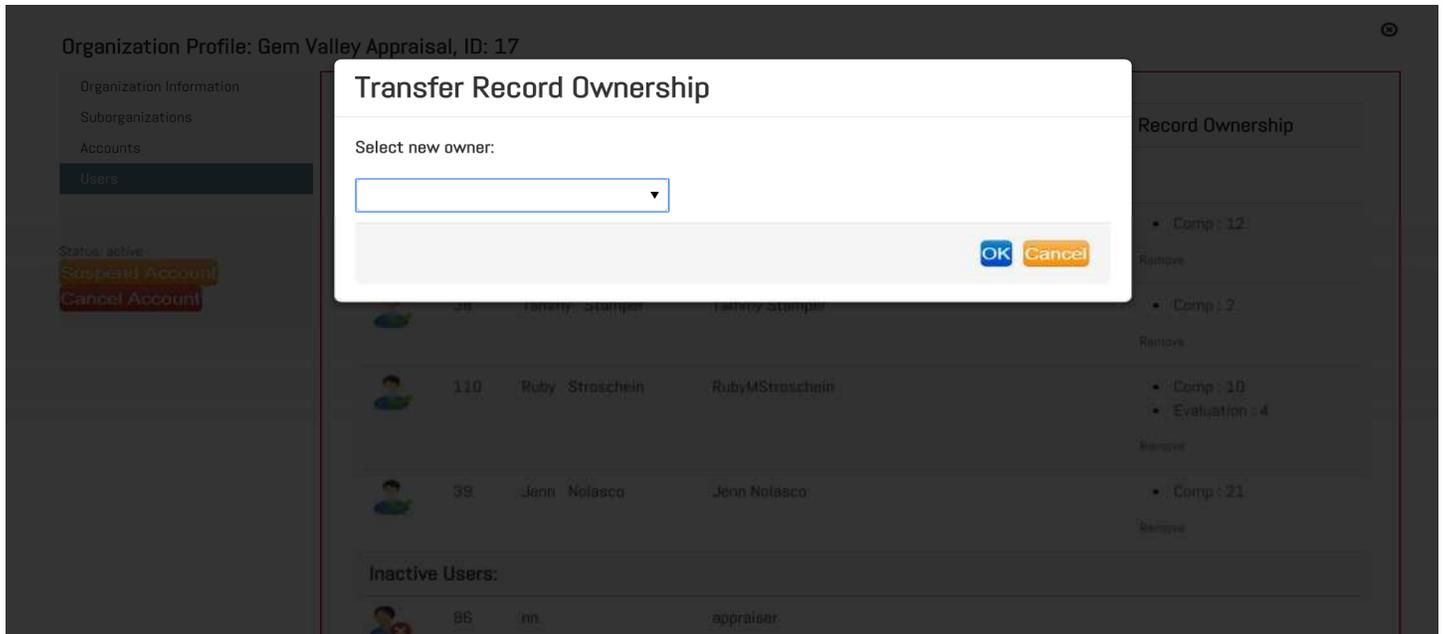
Once records have been transferred to the new record owner, the retiring user's account can be cancelled. If an administrator upgrades or downgrades a user's package, the administrator will use this process to transfer the user's records from the old account to the new account. i.e. Create the new user account with the upgraded package, transfer records, and cancel the user's old account.