UI/UX Website Update

Release Guide: 12-12-2023

Contents

SentriKey Real Estate Website – LB

Introduction

SentriKey Real Estate, SentriLock's website for lockbox and showing service users, is the one stop shop for users looking to administer, run reports, and review data. Colloquially referred to as 'the website' or 'the lockbox' website, every user typically uses this as their primary tool for using SentriLock when at a computer in their office or home office. When on the go, typically users will be using the app instead.

Logging In

1. Visit lb.sentrilock.com
2. Input SentriKey ID & Password
    - If ID is forgotten, this may be provided without successfully verifying any security data
    - If Password is forgotten, proceed to Forgot Password process
3. Advise the user select 'Keep me signed in for today' to ensure they are not timed out prematurely
4. Click 'Login'
    - Users who have not yet completed their security questions or cellphone/email verification will need to complete this before continuing
5. Many users will have multiple permission levels such as Agent and Broker, or Agent and Assoc Admin. Select the appropriate permission for reviewing the desired scope of data.

Forgot ID

Many users will forget their ID due to inactivity or autofill. While an ID may be freely provided despite a successful security verification, there is a self-serve process for retrieving a user ID:

1. Visit lb.sentrilock.com
2. Click 'Forgot SentriKey ID'
3. Input email address associated with SentriKey ID
4. Click 'Send e-mail'
5. Open email inbox
6. ID will be listed in the email from SentriLock LLC with subject line 'SentriKey ID Recovery'

Forgot Password

Many users will forget their ID due to inactivity or autofill. While an ID may be freely provided despite a successful security verification, there is a self-serve process for retrieving a user ID:

1. Visit lb.sentrilock.com
2. Click 'Forgot Password?'
3. Input SentriKey ID
4. Click 'Send e-mail'
5. Open email inbox
6. Open link in email from SentriLock LLC with subject line 'SentriKey Password Change Request'
7. Input new password and confirm it
    - Must contain at least 1 lowercase letter
    - Must contain at least 1 uppercase letter
    - Must contain at least 1 numeric value
    - Must contain at least 6 characters
8. Click 'Change Password'

Terms & Conditions Agreement

Upon logging in for the first time, new users will be asked to agree to a set of Terms & Conditions. Primarily, the user is agreeing not to share their account. **Click Accept & Submit.**

Set Default View

In the event of a user leveraging both SentriKey Showing Service, the user will be greeted by a screen asking the user to select their preferred home screen: My Dashboard, My Listings, or My Lockboxes and click 'Continue'

Agent/Assistant
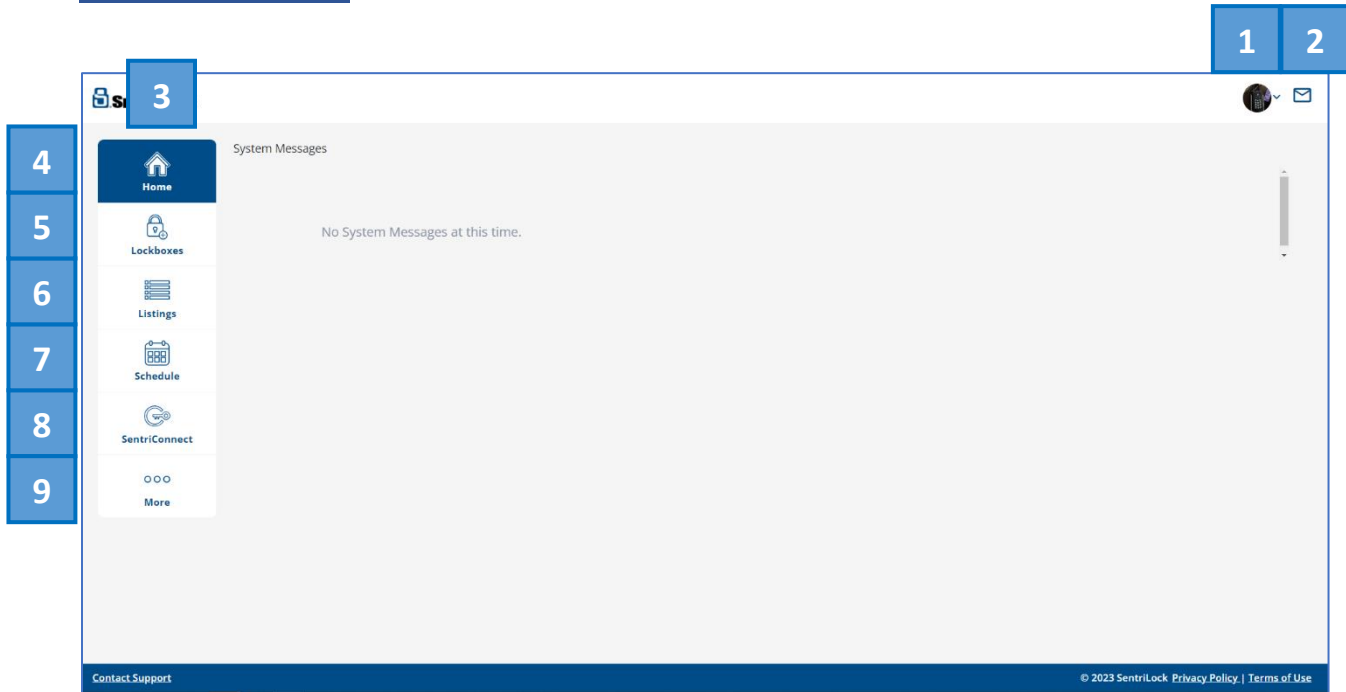
Overview

1) **My Account** – Access to My Settings, Lockbox Settings, Billing and Payments, Help, and Logout. If appropriate, also Change Permission.
2) **Message Center** – All SentriLock notifications will appear here such as showing notifications, system messages, and lockbox notifications.
3) **Main Menu** – Main menu allows for navigation between pages across the website.
4) **Home** – Users will see any active System Messages
5) **Lockboxes** – User may use this tab to provide lockbox specific administration and pull up information on: Recent History, Lockbox Settings, and System Information such as lockbox owner, Access Log, Event Log, warranty info, and review/adjust battery replacement date. Access Codes may also be created under this page.
6) **Listings** – Primary tab for users to administer listings and generate keyless access. Active, Residential properties are imported from the list at least once every 24 hours. Users may use this tab to assign lockboxes to listings, backdate access logs, adjust reciprocity, set up showing instructions, setup homeowner notifications, and generate keyless access such as Access Codes and SentriConnect. Users may also add manual listings if necessary, setup showing instructions,
7) **Schedule** – Basic Showing Scheduling system unless enrolled in SKSS.
8) **SentriConnect** – Users may use this tab to review existing SentriConnect access that have been granted as well as issue new ones.

9) **More –** Primary Tab with all user related data
    a. **RMA** – Review records regarding any defected lockboxes
    b. **Reports** – Printable and CSV reports regarding an array of data for this user
    c. **Access Times** – Overview of the allowed access hours as defined by the association
    d. **Support Tickets** – Review historical tickets created by SentriLock Support as well as submit tickets to Support
    e. **Live Chat** – Users may reach out to Support via instant message 10 am – 8 pm EST

My Account – Profile Settings – Edit Email/Cell Phone or Link Accounts

1. Click the drop the Account Menu drop at the top right
2. Select 'My Settings'
3. Adjust items as needed
   - Email and Cell Phone Number will require verification
   - Linked Accounts will require user to login to their additional accounts, enabling future ability to quickly swap between accounts as needed.
4. Click 'Save'

My Account – Account Settings – Change Password, Change PIN, Add Team Members

1. Click the drop the Account Menu drop at the top right
2. Select 'My Settings'
3. Select 'Account Settings'
4. Adjust items as needed
   - Change Password: Input current password, new password, and confirm password Click 'Change Password' once complete.
   - Change PIN: Input Current PIN, New PIN, and confirm PIN. If PIN is unavailable, use 'I don't know my PIN' at the bottom right to use security questions instead of current PIN. If unable to verify first question, user may select 'Answer a different question' at the bottom left to use their second question. Click 'Change PIN' once complete.
   - Add Team Members: Search names and click the '+' button to add a team member
   - Review device history, Event Log (report of all activity associated with this account,) and Access Log (report of all lockboxes this user has accessed.)
5. Click 'Save'

My Account – Lockbox Settings – Adjust Default Lockbox Settings

1. Click the drop the Account Menu drop at the top right
2. Select 'My Settings'
3. Select 'Lockbox Settings'
4. Adjust items as needed
5. Click 'Save'

Message Center

1. Click the envelope icon at the top right

Lockboxes – Assigning/Unassigning a Lockbox, Backdating Access Log, and Customizing Reciprocity

1. Click the 'Lockboxes' tab in the Main Menu
2. Find & click the Lockbox Serial Number
3. Search for & click on the listing address
4. Select the date the lockbox was placed on the property
5. Choose the region this lockbox is being placed in
6. Click 'Save'

Lockboxes – Reviewing Lockbox Settings

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Lockbox Settings' and the following will display:
    - Active Settings: Current settings applied to the lockbox
    - Agent Default Settings: Date the agent's Default Settings were last modified
    - Region Settings: Date the reciprocity was last customized
4. Click Close'

Lockboxes – Reviewing System Information – Lockbox Transfers, Access Logs, Event Logs, Warranties, and Battery Replacement Dates

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'System information' and the following will display:
    - Lockbox Owner & Transfer: Displays current owner and gives ability to transfer lockbox to another user
    - Access Log: Indicates all agents who have opened the lockbox to access the listing
    - Events Log: Indicates all activity the box has experienced aside from successful key bin openings
    - In Service:
    - Warranty Expiration: Indicates the date the lockbox is under warranty till
    - Last Battery Replacement: Date of last battery change and the ability to change that date to a specific date, or a shortcut for 'Battery Changed Today'
4. If any changes were made, click 'Save'

Lockboxes – Reviewing Recent History

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Recent History' and the following will display:
   - Last Borrower: For Broker Lockbox Sharing, this will show the last individual to have borrowed the lockbox from the broker
   - Last Listing Agent: Listing Agent for the last listing this lockbox was assigned to
   - Last Accessed By: Last agent to open the key bin
4. Click 'Close'

Lockboxes – Generating and Reviewing Access Codes

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Access Codes' and all previously generated Access Codes associated with this lockbox will appear along with a 'Get Access Code' button
4. To generate a new code:
   - Click 'Get Access Code'
   - Configure the:
     - FlexCode (For SentriGuard lockboxes):
       1. Input who the code is being given to in 'Assigned to'
       2. Select the start date and start time the code is needed
       3. Select the end date and end time the code is needed
       4. Click 'Get FlexCode'
     - 1 Day Code (for Non SentriGuard Lockboxes):
       1. Input who the code is being given to in 'Assigned to'
       2. Select the date the code is needed
       3. Click 'Get 1 Day Code'
   - Input YOUR PIN and click 'Continue'
   - The code is now presented along with an expandable instructions section
   - Click 'Done'
5. Click 'Close'

Please note, lockbox must be assigned to generate an Access Code.

Listings – Showing Instructions

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the address
3. Adjust instructions as needed
4. Click 'Save'
5. A success message will appear in green at the bottom of the page

Listings – Access Codes

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the '…' to the far right
3. Click on 'Access Codes' and all previously generated Access Codes associated with this lockbox will appear along with a 'Get Access Code' button
4. To generate a new code:
   - Click 'Get Access Code'
   - Configure the:
     1. FlexCode (For SentriGuard lockboxes):
        1. Input who the code is being given to in 'Assigned to'
        2. Select the start date and start time the code is needed
        3. Select the end date and end time the code is needed
        4. Click 'Get FlexCode'
        5. Input YOUR PIN and click 'Continue'
     2. 1 Day Code (for Non SentriGuard Lockboxes):
        1. Input who the code is being given to in 'Assigned to'
        2. Select the date the code is needed
        3. Click 'Get 1 Day Code'
        4. Input YOUR PIN and click 'Continue'
   - The code is now presented along with an expandable instructions section
   - Click 'Done'
5. Click 'Close'

Listings – SentriConnect

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the '…' to the far right
3. Click on 'SentriConnect' and all previously generated SentriConnect accesses associated with this lockbox will appear along with a 'Grant Access' button
4. To generate a new access:
   - Click 'Grant Access'
   - Configure the SentriConnect access:
     1. Input the email address of the individual access is being given to
     2. Select the start date and start time the access is needed
     3. Select the end date and end time the access is needed
     4. Click 'Grant Access'
     5. Input YOUR PIN and click 'Continue'
     6. A success message will appear in green at the bottom of the page
   - Revocable access is now granted to that SentriConnect user
     - First time SentriConnect users will need to follow the SentriConnect account creation process, download the app, and login
     - Access may be revoked any time prior to the start date and start time via the Message Center notification of access being granted or the SentriConnect tab on the website
5. Click 'Close'

Listings – Assigning/Unassigning a Lockbox, Backdating Access Log, and Customizing Reciprocity

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the '…' to the far right
3. Find and click on the Lockbox Serial Number
4. Select the date the lockbox was placed on the property
5. Choose the region this lockbox is being placed in
6. Click 'Assign Lockbox'

Listings – Enable/Disable Access by Appointment

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the '…' to the far right
3. Click on 'Enable ABA'
4. A success message will appear in green at the bottom of the page

Listings – Manage Contacts (Homeowner Notifications)

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the '…' to the far right
3. Click on 'Manage Contacts'
4. Input up to two homeowners to notify: First Name, Last Name, Cell Phone Number
5. Click 'Save'
6. A success message will appear in green at the bottom of the page

Listings – Edit Listing (Manually Created Listings)

1. Click the 'Listings' tab in the Main Menu
2. Find the listing and & click the '…' to the far right
3. Click on 'Edit Listing'
4. Configure up to two homeowners to notify
5. Click 'Save'
6. A success message will appear in green at the bottom of the page

Listings – Add Listing (Manually Created Listings)

1. Click the 'Listings' tab in the Main Menu
2. Click the 'Add Listing' button at the top right
3. Configure the listing details
4. Click 'Add Listing'
5. A success message will appear in green at the bottom of the page

Listings – Merge Listings (Manually Created Listings)

1. Click the 'Listings' tab in the Main Menu
2. Click the 'Merge Listings' button at the top right
3. Find the listings and place a checkmark to the left of them
4. Click on 'Continue'
5. A success message will appear in green at the bottom of the page

Schedule – Viewing Schedule Dashboard

1. Click the 'Listings' tab in the Main Menu
2. All appointments will be visible and filterable in the calendar

Schedule – Schedule a Showing

1. Click the 'Listings' tab in the Main Menu
2. Click on 'Schedule a Showing'
3. Configure the showing:
   - Find the listing address
   - Select the Date
   - Select the Duration
   - Select the type of showing
4. Click 'Schedule Now'
5. A success message will appear in green at the bottom of the page

SentriConnect – View SentriConnect Access Granted

1. Click the 'SentriConnect' tab in the Main Menu
2. All previously generated SentriConnect accesses associated with all listings will be displayed. If access is in the future, the SentriConnect access may be revoked by clicking 'Revoke Access.'

SentriConnect – Grant SentriConnect Access

1. Click the 'Listings' tab in the Main Menu
2. Click on 'Schedule a Showing'
3. Configure the SentriConnect access:
   - Input the email address of the individual access is being given to
   - Click the 'Select' button to the right of the lockbox field
   - Find the listing and click the radio button to the far left
   - Click 'Submit'
   - Select the start date and start time the access is needed
   - Select the end date and end time the access is needed
4. Click 'Grant Access'
5. A success message will appear in green at the bottom of the page
   - Revocable access is now granted to that SentriConnect user

- First time SentriConnect users will need to follow the SentriConnect account creation process, download the app, and login
- Access may be revoked any time prior to the start date and start time via the Message Center notification of access being granted or the SentriConnect tab on the website

… More -> RMA – Viewing RMAs Issued

1. Click the '… More' tab in the Main Menu and click on 'RMA' from the drop down menu
2. All RMAs will be visible and filterable via the search menu

… More -> Reports – Viewing Reports

1. Click the '… More' tab in the Main Menu and click on 'Reports' from the drop down menu
2. All available reports for this permission level are available as printable pages or CSV spreadsheets. They also only contain information the user has access to. Here is a breakdown of available reports:
   - Client Listing Accesses: Breakdown of all showings for a particular property
   - Listings: Breakdown of all listings and related details
   - Lockboxes: Breakdown of all lockboxes and related details
   - Lockbox Accesses: Breakdown of all accesses of this user's lockboxes
   - RMA: Breakdown of all RMAs
   - RMA Count by Type: Breakdown of the problems reported for all RMAs
   - Support Tickets: Breakdown of all support tickets that have been generated

… More -> Access Times – Viewing Associations Allowed Access Hours

1. Click the '… More' tab in the Main Menu and click on 'Access Hours' from the drop down menu
2. The Associations Access Time Matrix (ATM) will be displayed in four hour blocks. Navigate between the blocks to assess when lockboxes may be used by non-owners.

… More -> Support Tickets – Viewing Past Tickets

1. Click the '… More' tab in the Main Menu and click on 'Support Tickets' from the drop down menu
2. All Support Tickets from this user will be visible and filterable via the search menu

… More -> Support Tickets – Submitting a New Ticket

1. Click the '… More' tab in the Main Menu and click on 'Support Tickets' from the drop down menu
2. Click 'Create Support Ticket'
3. Configure the ticket
4. Click 'Save Changes'

… More -> Live Chat – Contacting Support via Instant Message
1. Click the '… More' tab in the Main Menu and click on 'Live Chat' from the drop down menu
2. Select the appropriate department for the question
3. Enter Name and Email address
4. Clearly state question
5. Click 'Start Chat' to begin your session

Broker/Office Staff

Brokers and Office Staff largely experience the website in the exact same way as the Agent. The only differences between the two are the scope of data includes all agents within the user's brokerage, a few additional reports, and access to a few additional tools.

Below you'll find only new functions unlocked at this permission level.

Users – View all Users Within Company
1. Click the 'Users' tab in the Main Menu
2. All users in this brokerage will be listed with access to:
   - Account Information
   - Profile Settings
   - Account Settings
   - Lockbox Settings
   - Agent Access Log

Users – Add User (Add Office Staff)
1. Click the 'Users' tab in the Main Menu
2. Click 'Add User' at the top right
3. Configure the user
4. Click 'Save'
5. A success message will appear in green at the bottom of the page

… More -> Reports – Viewing Reports
1. Click the '… More' tab in the Main Menu and click on 'Reports' from the drop down menu
2. All available reports for this permission level are available as printable pages or CSV spreadsheets. They also only contain information the user has access to. Here is a breakdown of available reports (broker/office staff unique reports bolded):
   - Client Listing Accesses: Breakdown of all showings for a particular property
   - Listings: Breakdown of all listings and related details
   - Lockboxes: Breakdown of all lockboxes and related details

- Lockbox Accesses: Breakdown of all accesses of this user's lockboxes
- **Lockbox Count by Company: Breakdown of total lockboxes by company**
- **Unassigned Lockboxes: Breakdown of all lockboxes not actively assigned**
- RMA: Breakdown of all RMAs
- RMA Count by Type: Breakdown of the problems reported for all RMAs
- **Companies: Breakdown of companies associated with the user**
- **Users: Breakdown of all users associated with the company**
- **Users by Company: Breakdown of all users by company**
- Support Tickets: Breakdown of all support tickets that have been generated

Assoc Admin/Support/Sys Admin

As with Brokers and Office Staff, these permission levels have all the functionality as described in previous walkthroughs while unlocking a wider scope of data that includes all members of the association/system. Additionally, these permission levels have a few administrative tools in their tool box that are not part of the agent and broker/office staff experience.

Below you'll find only new functions unlocked at this permission level.

Important Note – Navigating at an Administrative Level

At agent, broker, and office staff levels, users will typically see the targeted data upon clicking a tab. When using the website at Assoc Admin or higher, the data must be searched for. While all previous walkthroughs are still accurate, make sure to add the step of searching for the information in question, such as a lockbox, listing, or user.

Home – View Dashboard of Lockbox Inventory, Lockbox Utilization, and Lockbox Access
1. Click the 'Home' tab in the Main Menu
2. Adjust filters to review data desired:
    - Lockbox Inventory: Breakdown of total lockboxes, lockboxes distributed, lockboxes owner, and lockboxes available
    - Lockbox Utilization: Breakdown of lockboxes owned compared to lockboxes assigned
    - Lockbox Access: Breakdown of lockbox access geographically and numerically

Lockboxes – Mass Battery Change
1. Click the 'Lockboxes' tab in the Main Menu
2. Click on 'Mass Battery Change'
3. Select the date of battery change
4. Input all lockbox serial numbers
5. Click 'Save'

Lockboxes – Mass Lockbox Transfer

1. Click the 'Lockboxes' tab in the Main Menu
2. Click on 'Mass Lockbox Transfer'
3. Search for and click on the origin agent in the 'From Agent' field
4. Search for and click on the destination agent in the 'To Agent' field
5. Click 'Transfer'

Lockboxes – View Manufacturing Data

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Manufacture' and the following will display:
   - Date: Indicates the date the lockbox was manufactured
   - Lot: Indicates the batch of lockboxes this is from on the Assembly side
   - Hardware Version: Indicates the build/generation of lockbox
   - Firmware Version: Indicates current lockbox firmware
4. Click Close'

Lockboxes – Generate Cardless Clock Code

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Cardless Clock Code'
4. A CCC will be presented along with instructions for usage (ENT + CCC + ENT + Time Code + ENT)

Lockboxes – Generate Emergency Clock Code

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Emergency Clock Code'
4. Find the agent and click on their name in the search results
5. Click 'Generate Code'
6. An ECC will be presented along with instructions for usage (Insert SentriCard and type in ECC + ENT + Time Code + ENT)

Lockboxes – Generate Emergency Shackle Code

1. Click the 'Lockboxes' tab in the Main Menu
2. Find the Lockbox Serial Number and click the '…' to the far right
3. Click on 'Emergency shackle Code' and an ESR code will be presented along with instructions for usage (ENT + ESR Code + ENT)

Users – Activating Account and Edit Reciprocity

1. Click the 'Users' tab in the Main Menu
2. Find the agent and click on their Account Number
3. Adjust Profile Settings as desired:
   - Edit Authorized Regions: Adjust reciprocity for the user
   - Authorize Access to SentriKey: If available, will grant SKRE access to the user
   - Authorize Access to Showing Service: If available, will grant SKSS access to the user
   - Resend Activation Invite: If applicable, this will resend the activation email to the user
   - *Note: Other details such as name, company, etc. import from the MLS and should be adjusted there. The data will then sync to SentriLock's server.*
4. Click 'Save'

Users – Change Account Status, Add/Edit Permissions, and Update App Registrations

1. Click the 'Users' tab in the Main Menu
2. Find the agent and click on their permission
3. Adjust Account Settings as desired:
   - Account Status: Manually adjust status between Valid and Terminated
   - Add Permissions: Manually add additional permissions for the user
   - Update Registrations: Adjust current registration count, or toggle on unlimited registrations

… More -> Companies – View Company Information, Viewing Brokers, and Adding Broker

1. Click the '… More' tab in the Main Menu and click on 'Companies' from the drop down menu
2. Find the company and click on the name
3. All information on the brokerage may be found on this page
4. Click 'Company Brokers' at the top left to view brokers actively associated with the company. Click on their name to view or edit Broker Lockbox Sharing and Show All settings.
5. Click 'Add Company Broker' at the top left to add a broker to the company
   - Click the 'Select' button to the right of broker
   - Find the broker and click the radio button
   - Click 'Submit Changes'
   - Click the 'Select' button to the right of brokerage
   - Find the brokerage and click the radio button
   - Click 'Submit Changes'
   - Adjust Lockbox Sharing as desired
   - Adjust Show All as desired
   - Click 'Save Changes'

… More -> Associations

1. Click the '… More' tab in the Main Menu and click on 'Associations' from the drop down menu
2. At this time, Association settings are only reviewable and changeable by speaking with the Association's Customer Success Manager

… More -> Regions – Review Reciprocal Region and Agent Reciprocity

1. Click the '… More' tab in the Main Menu and click on 'Regions' from the drop down menu
2. Find the region and click on the name
3. Find agents and adjust reciprocity as appropriate

… More -> Reports – Viewing Reports

1. Click the '… More' tab in the Main Menu and click on 'Reports' from the drop down menu
2. All available reports for this permission level are available as printable pages or CSV spreadsheets. They also only contain information the user has access to. Here is a breakdown of available reports (assoc admin unique reports bolded):
   - Client Listing Accesses: Breakdown of all showings for a particular property
   - Listings: Breakdown of all listings and related details
   - Lockboxes: Breakdown of all lockboxes and related details
   - **Lockbox Accesses by Month: Breakdown of all accesses of this user's lockboxes**
   - Lockbox Count by Company: Breakdown of total lockboxes by company
   - **Lockbox Count by Company Summary: Breakdown of total lockboxes by company**
   - **Assigned Lockbox Count By Month: Breakdown of total lockboxes assigned by month**
   - **Lockbox Status by Company: Breakdown of all lockboxes by company**
   - **Lockbox Transfers: Breakdown of all lockbox transfers initiated**
   - **Purchased Lockboxes: Breakdown of all purchased lockboxes**
   - Unassigned Lockboxes: Breakdown of all lockboxes not actively assigned
   - **Lost / Stolen / Hidden: Breakdown of all lockboxes with this status**
   - **Upgrade Exchange Program: Breakdown of lockboxes in the upgrade exchange program**
   - RMA: Breakdown of all RMAs
   - RMA Count by Type: Breakdown of the problems reported for all RMAs
   - Companies: Breakdown of companies associated with the user
   - Users: Breakdown of all users associated with the company
   - Users by Company: Breakdown of all users by company
   - **SentriCards: SentriCard oriented breakdown of all SKRE accounts**
   - **Active Card Count by Company: Breakdown of all SKRE accounts**
   - **Active Card Count by Company Summary: Detailed breakdown of all SKRE accounts**
   - **Issued Card Count by Month: Breakdown of all new SKRE accounts**
   - **Issued Card Count by Month Detail: Detailed breakdown of all new SKRE accounts**
   - **Terminated Cards: Breakdown of all terminated accounts**
   - **Agents: Breakdown of all agents affiliated with the association**

- **Region Agent Authorization: Breakdown of agents by reciprocity**
- Support Tickets: Breakdown of all support tickets that have been generated
- **SentriKey Geo Coordinate Outliers: Breakdown of SKRE App accesses where geolocation does not align with listing address**

… More -> Product Updates – View Release Notes

1. Click the '… More' tab in the Main Menu and click on 'Product Updates' from the drop down menu
2. User will be redirected to the SentriLock blog with release notes for each major release

… More -> Mass Lockbox Transfer – Transfer All Lockboxes From One Agent to Another

1. Click the '… More' tab in the Main Menu and click on 'Reports' from the drop down menu
2. Search for and click on the origin agent in the 'From Agent' field
3. Search for and click on the destination agent in the 'To Agent' field
4. Click 'Transfer'

… More -> Transfer SentriCard – Transfer a SentriCard Between Two Accounts Owned by the Same Agent

1. Click the '… More' tab in the Main Menu and click on 'Transfer SentriCard' from the drop down menu
2. Search for and click on the origin agent account in the 'From' field
3. Search for and click on the destination agent account in the 'To' field
4. Click 'Transfer SentriCard'

… More -> Products Order Form – View Company Information, Viewing Brokers, and Adding Broker

1. Click the '… More' tab in the Main Menu and click on 'Products Order Form' from the drop down menu
2. Redirects the user to NetSuite to order product
3. Any information or questions on this should be directed to the Customer Success Manager

… More -> Indemnifications – View the Association's Indemnification

1. Click the '… More' tab in the Main Menu and click on 'Indemnifications' from the drop down menu
2. Find the indemnification and click on the name to review or edit
3. To add a new indemnification agreement, click 'Add Vendor Auth' at the top left
   - Click the 'Select' button to the right of Vendor
   - Find the vendor and click the radio button to the left of it
   - Click 'Submit Changes
   - Adjust indemnification type and status and click 'Save Vendor'