INSTAKEY
Security Systems

Digital KeyHolder Update Tutorial
Release 4.0.1 - 3/29/2019

7456 W. 5th Ave, Lakewood CO 80226
P: 800-316-5397
www.instakey.com

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Digital KeyHolder Update Instructions

There are 3 available options for logging in, see below:

- Log In via Email Access – Pages 3 - 17
- Log In via Certification Authentication – Pages 18 - 31
- Log In via SecurityRecords Credentials – Pages 32 - 42

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Digital KeyHolder Update Instructions

- Log In via Email Access

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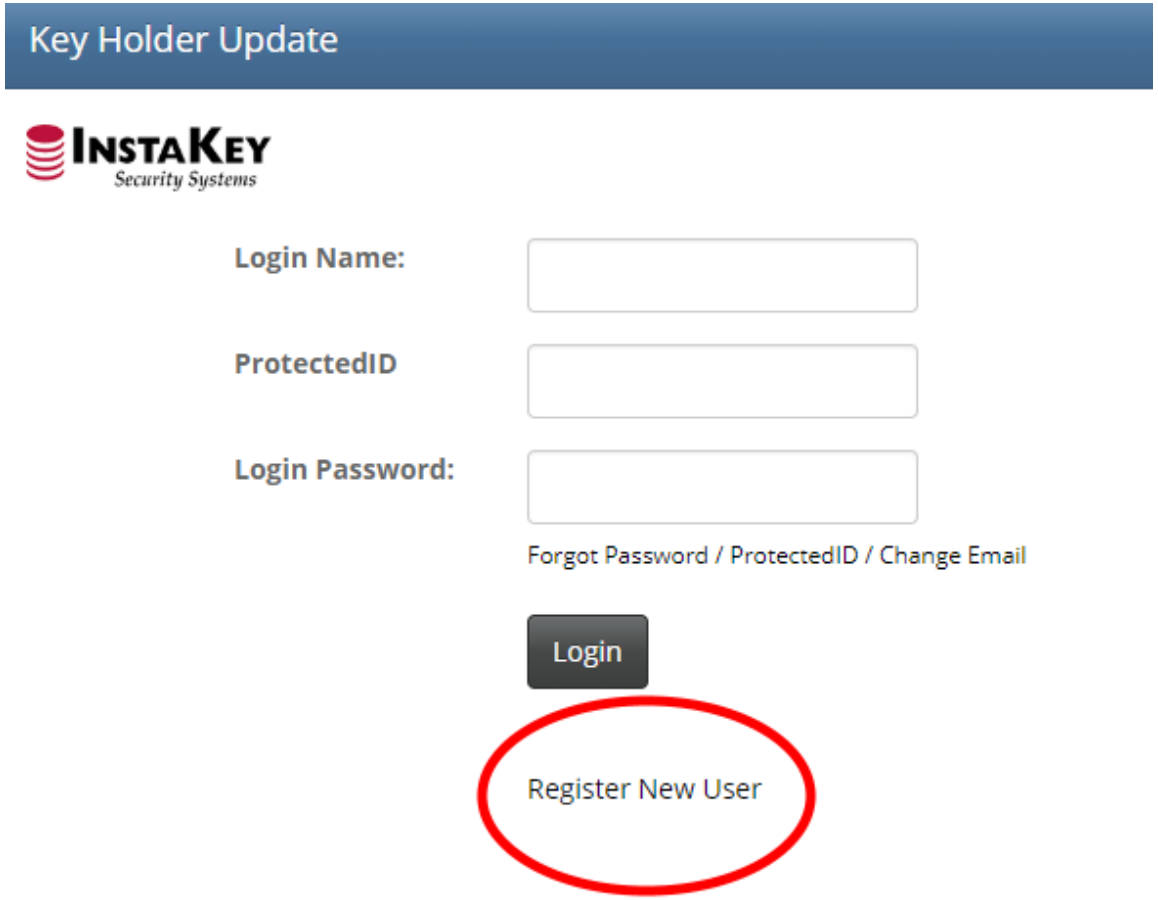
1. To begin, Key Holders will navigate to:
https://www.securityrecords.com/srdigitalkeyholder/mainsite/login.aspx
For first time access, press the “Register New User” link at the bottom of the page.



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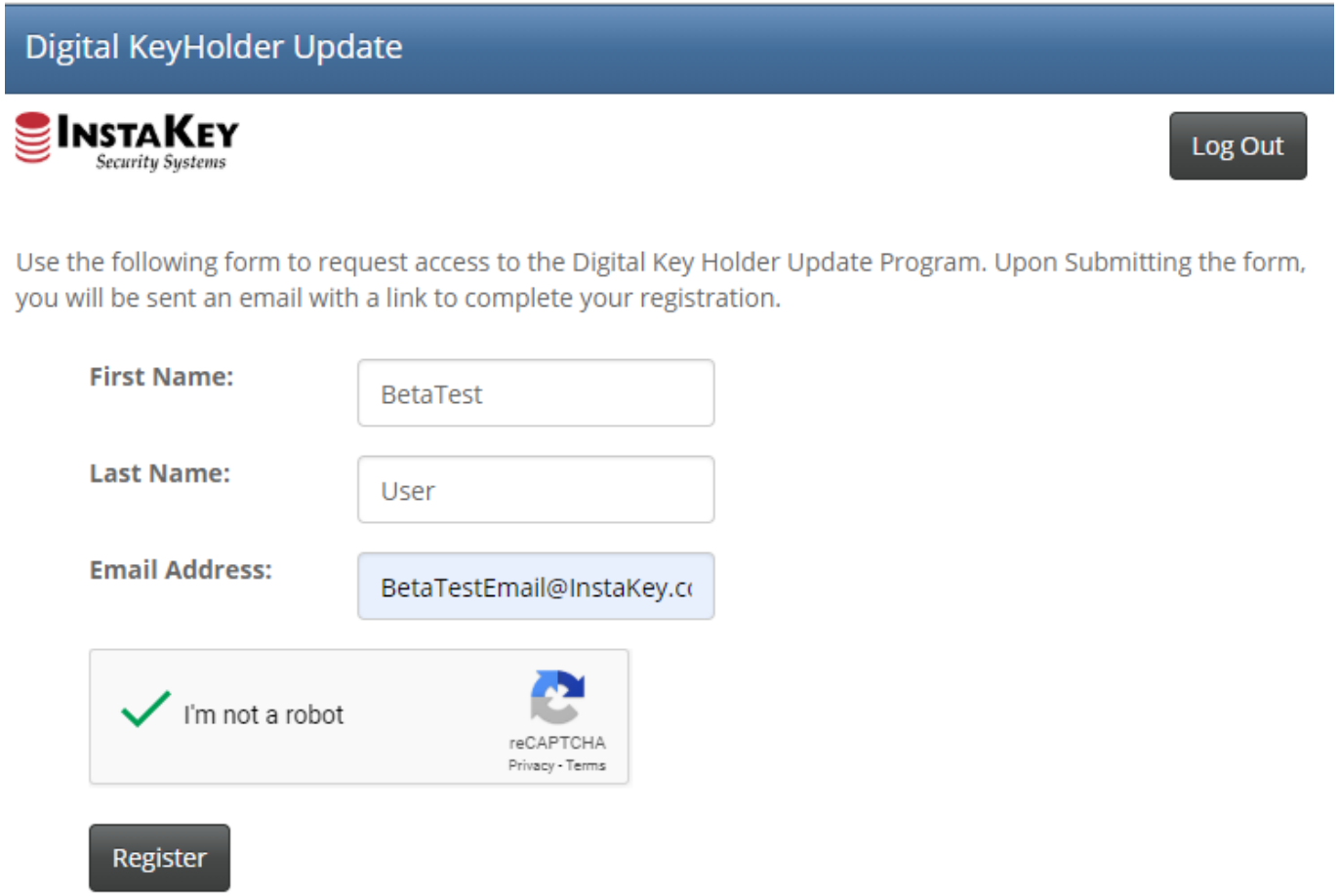
2. Once clicked, an email verification page will ask to input First Name, Last Name and email address. **User must input their work email.** Any email address must be from a verified domain or an error message will appear.



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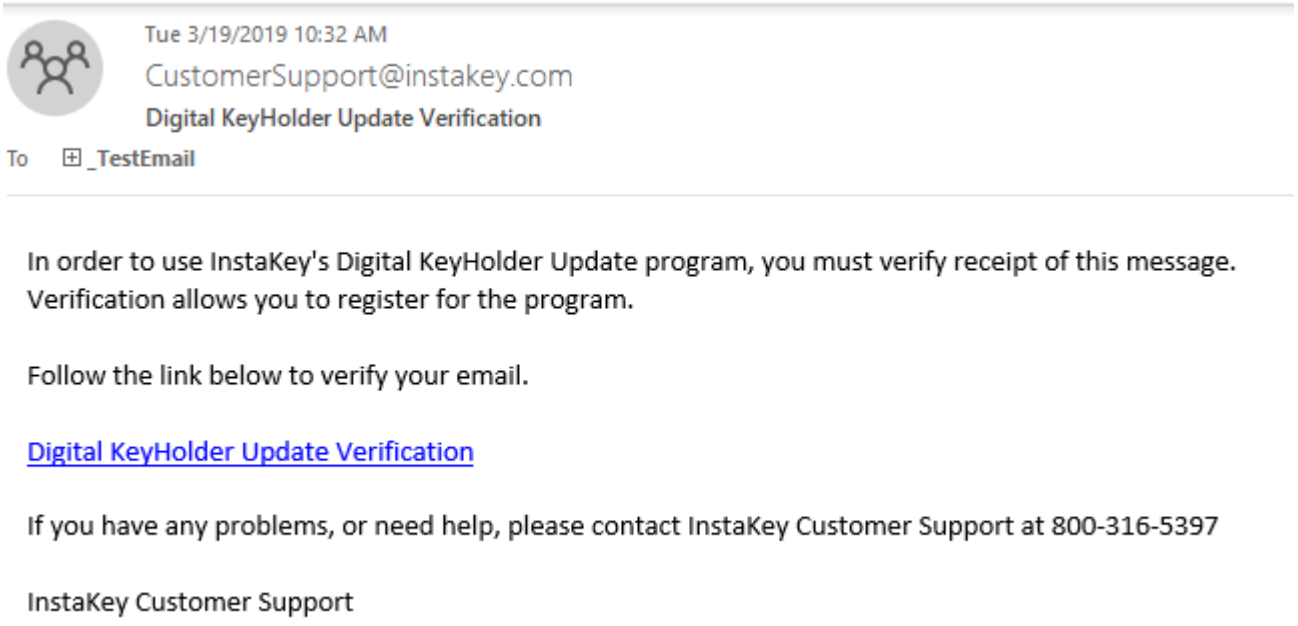
3. An email will be sent with a link. It's important to note that if your IT department has not white listed InstaKey.com, this email may end up in your junk folder. Click on the link provided to be sent to the registration page.



Tue 3/19/2019 10:32 AM

CustomerSupport@instakey.com

Digital KeyHolder Update Verification

To ⊞ _TestEmail

In order to use InstaKey's Digital KeyHolder Update program, you must verify receipt of this message. Verification allows you to register for the program.

Follow the link below to verify your email.

Digital KeyHolder Update Verification

If you have any problems, or need help, please contact InstaKey Customer Support at 800-316-5397

InstaKey Customer Support

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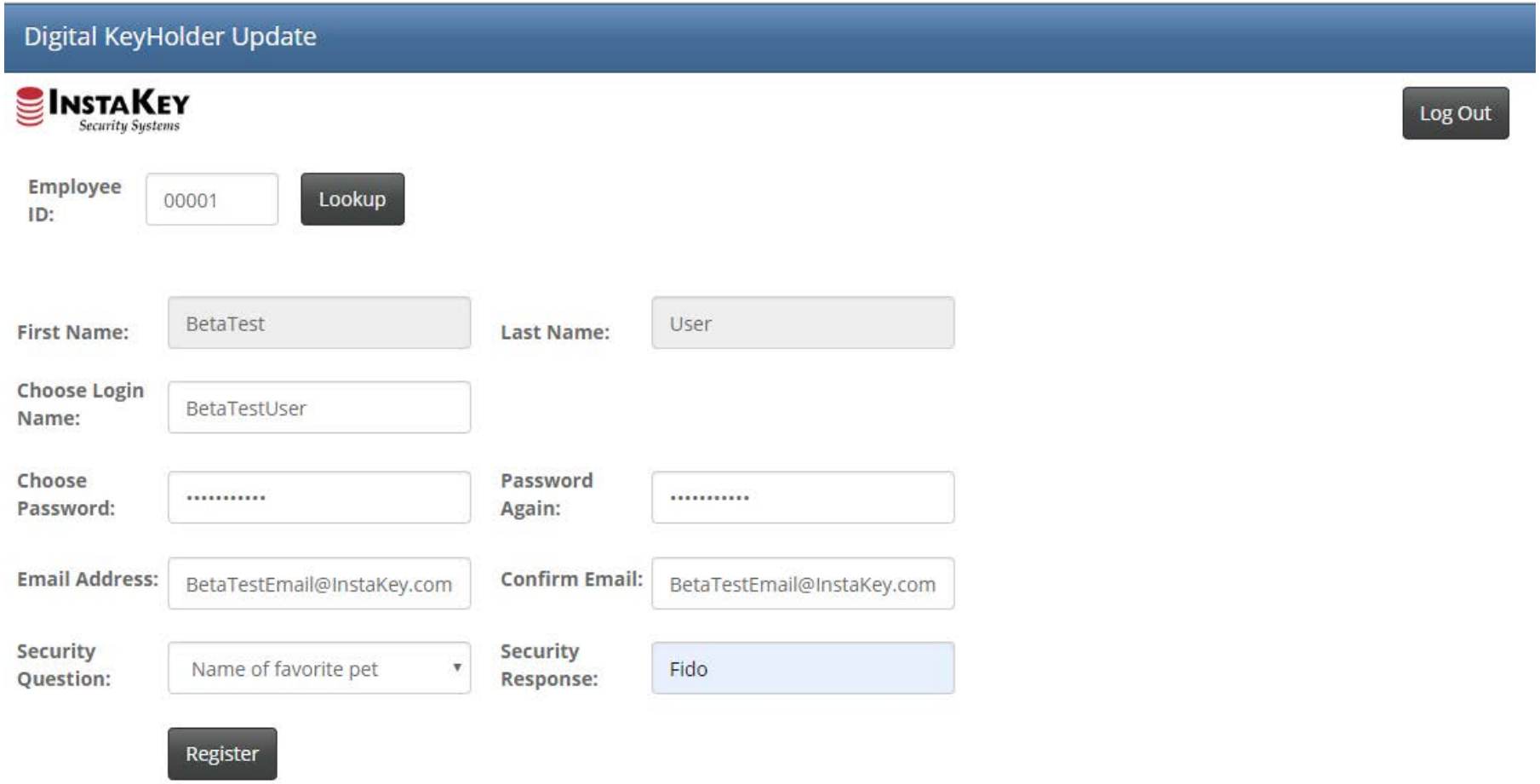
4. At the registration page, search for yourself via employee ID. If found, the First Name, Last Name and email address fields will be prepopulated. Fill out all fields and press Register. This will send an additional email with a protected ID.



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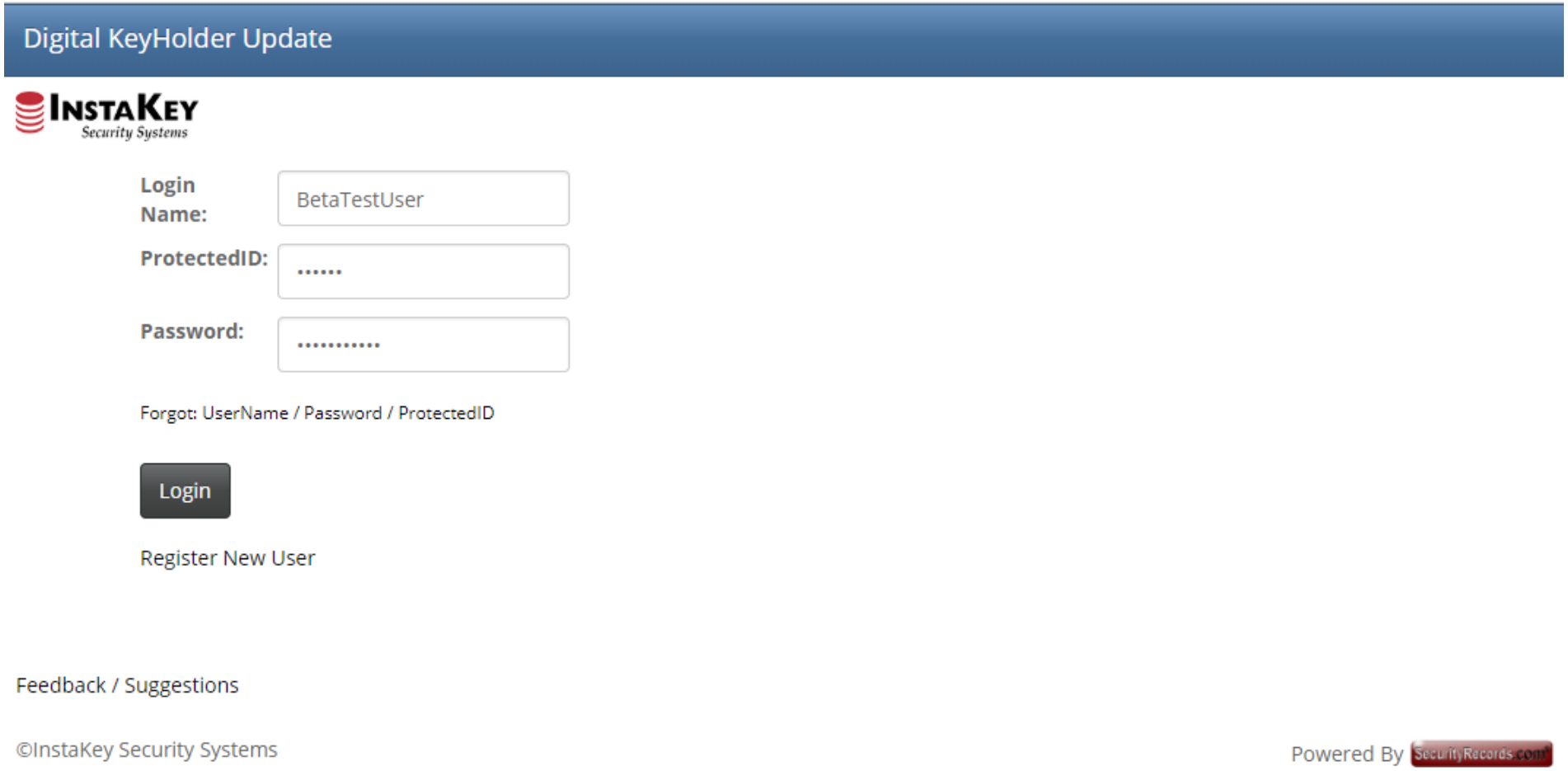
5. Once registered you will be brought back to the Login Screen. On the login screen, enter login name, protected ID (supplied via email) and password.



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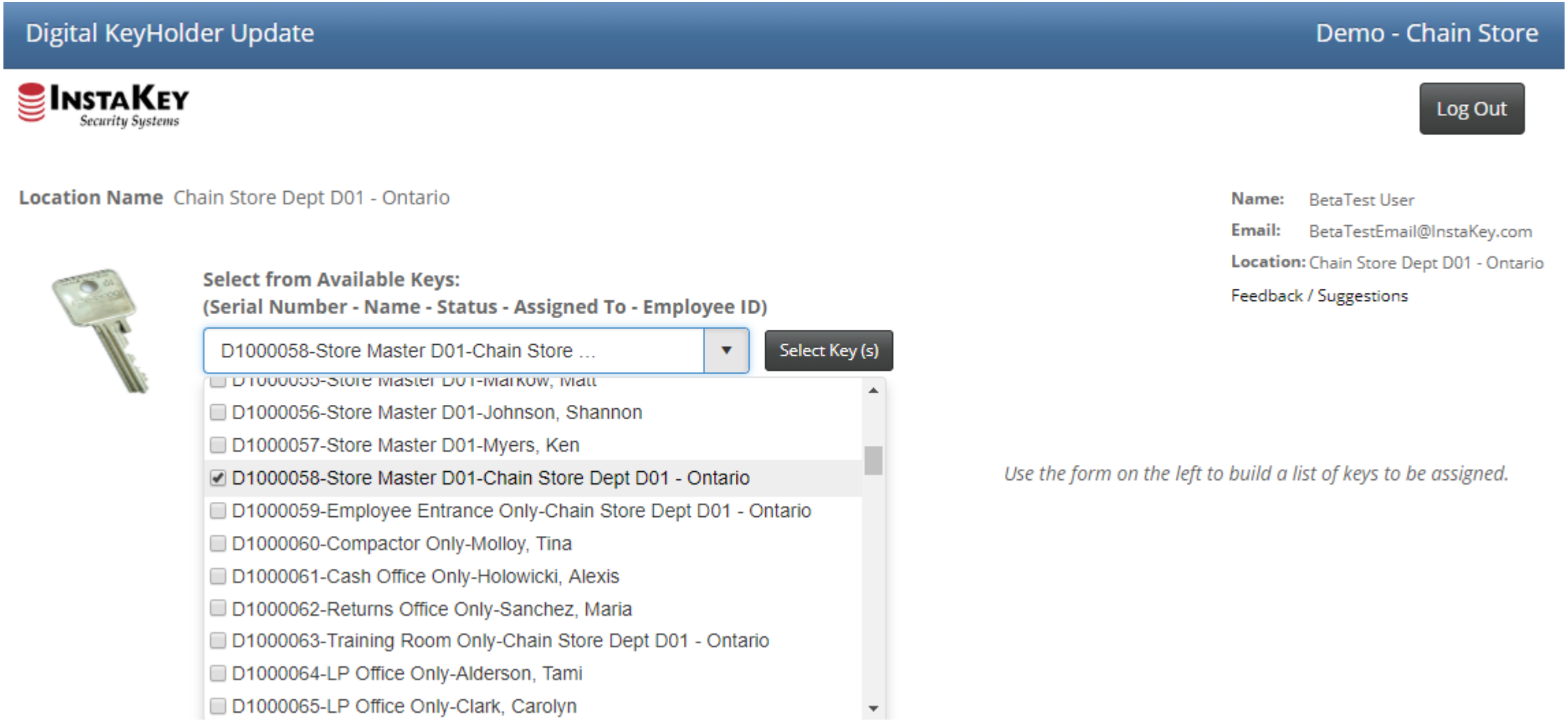

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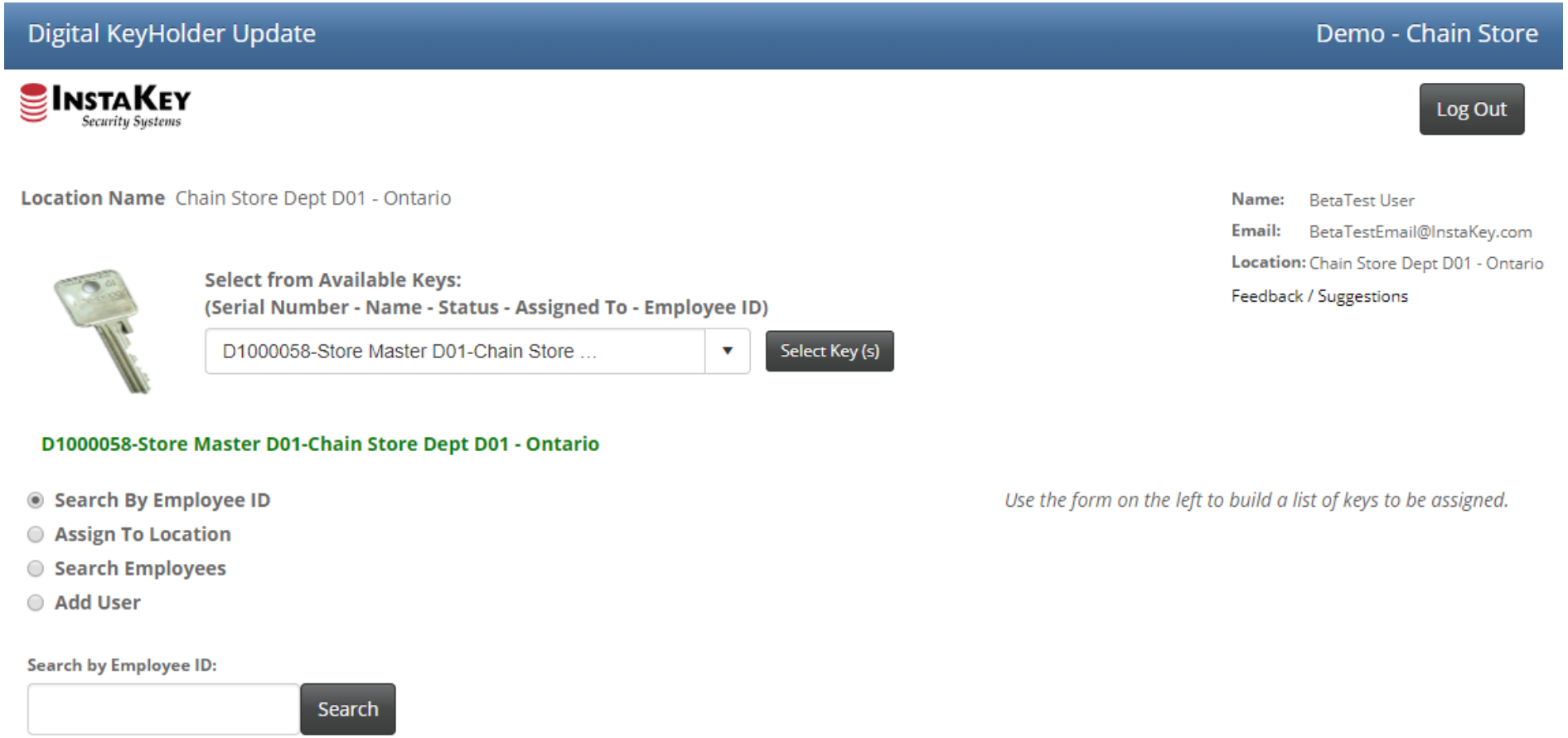

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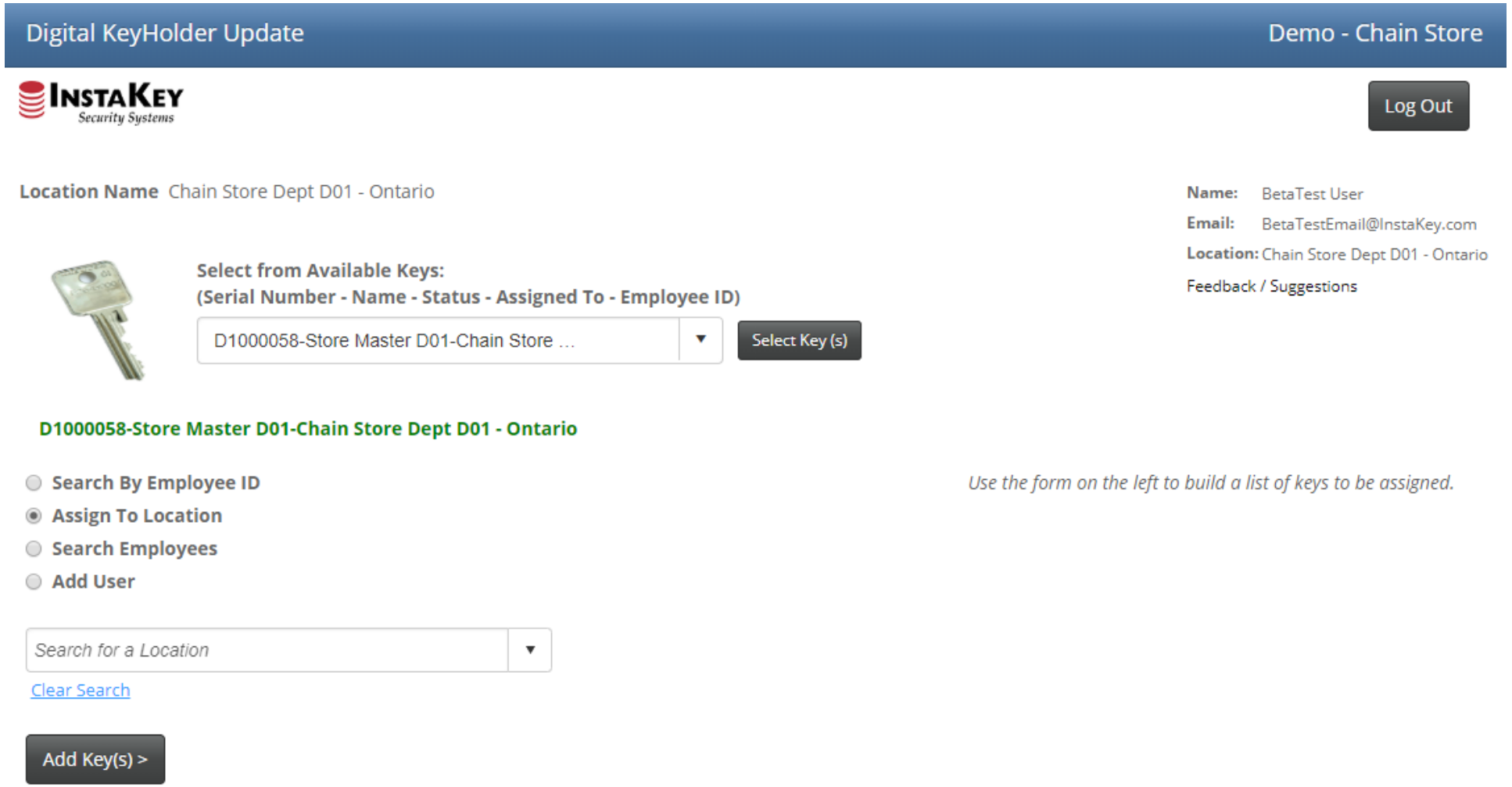

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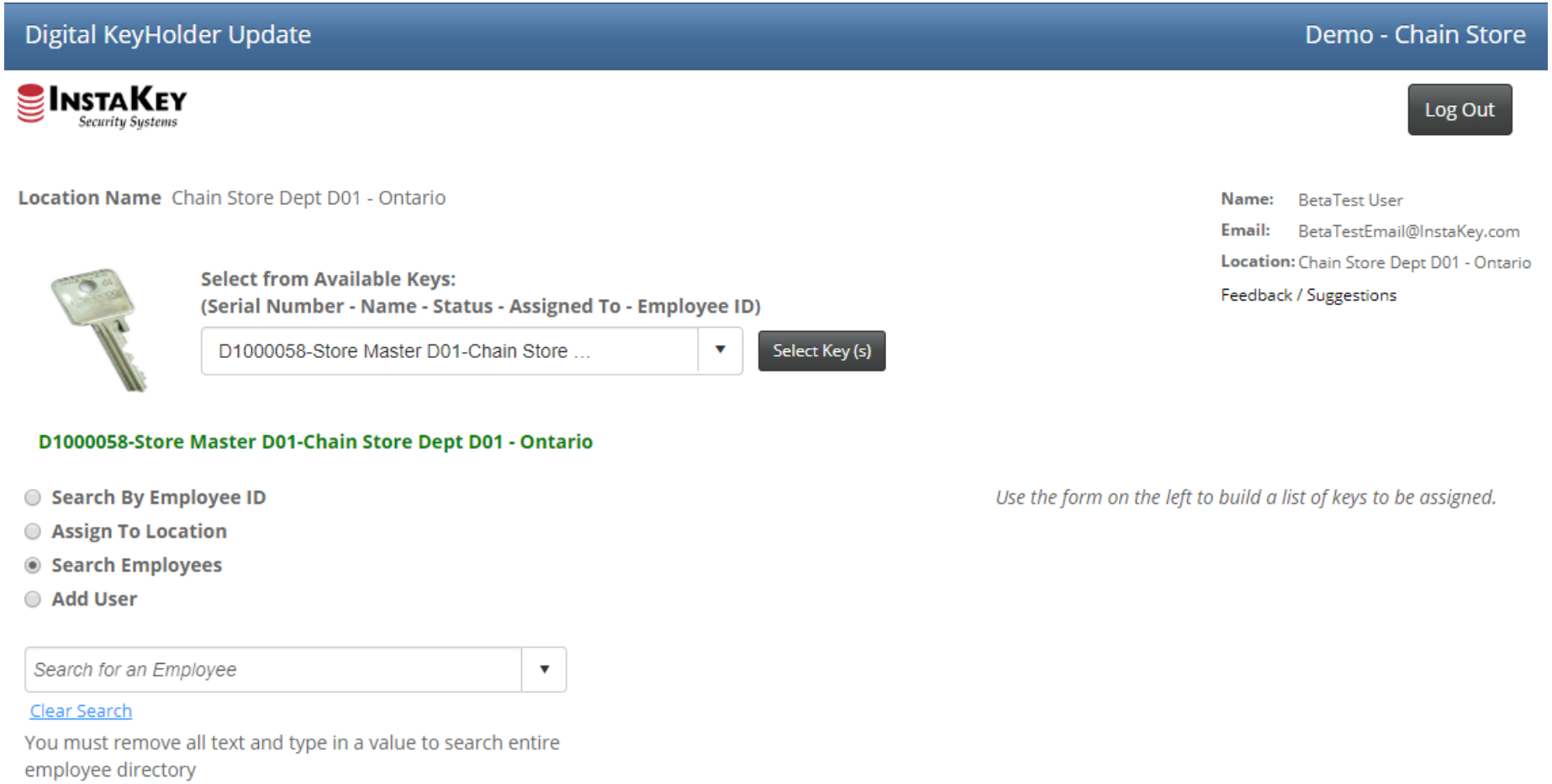

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10. One or many keys may be updated simultaneously. Before pressing “Submit Key Log Update”, to obtain a key receipt for the keys select, click “E-Sign”

Digital KeyHolder Update — Demo - Chain Store

Email: BetaTestEmail@InstaKey.com
Location: Chain Store Dept D01 - Ontario
Feedback / Suggestions

Select from Available Keys:
(Serial Number - Name - Status - Assigned To - Employee ID)

Select Key ▼ | Select Key (s)

- ○ Search By Employee ID
- ○ Assign To Location
- ◉ Search Employees
- ○ Add User

User, BetaTest - 00001 ▼

Clear Search

You must remove all text and type in a value to search entire employee directory

Add Key(s) >

Keys to Be Assigned: 1

Serial Number(s)	Issue To	Remove	E-Signature
D1000058	User, BetaTest - 00001	☒	E-Sign

Submit Key Log Update

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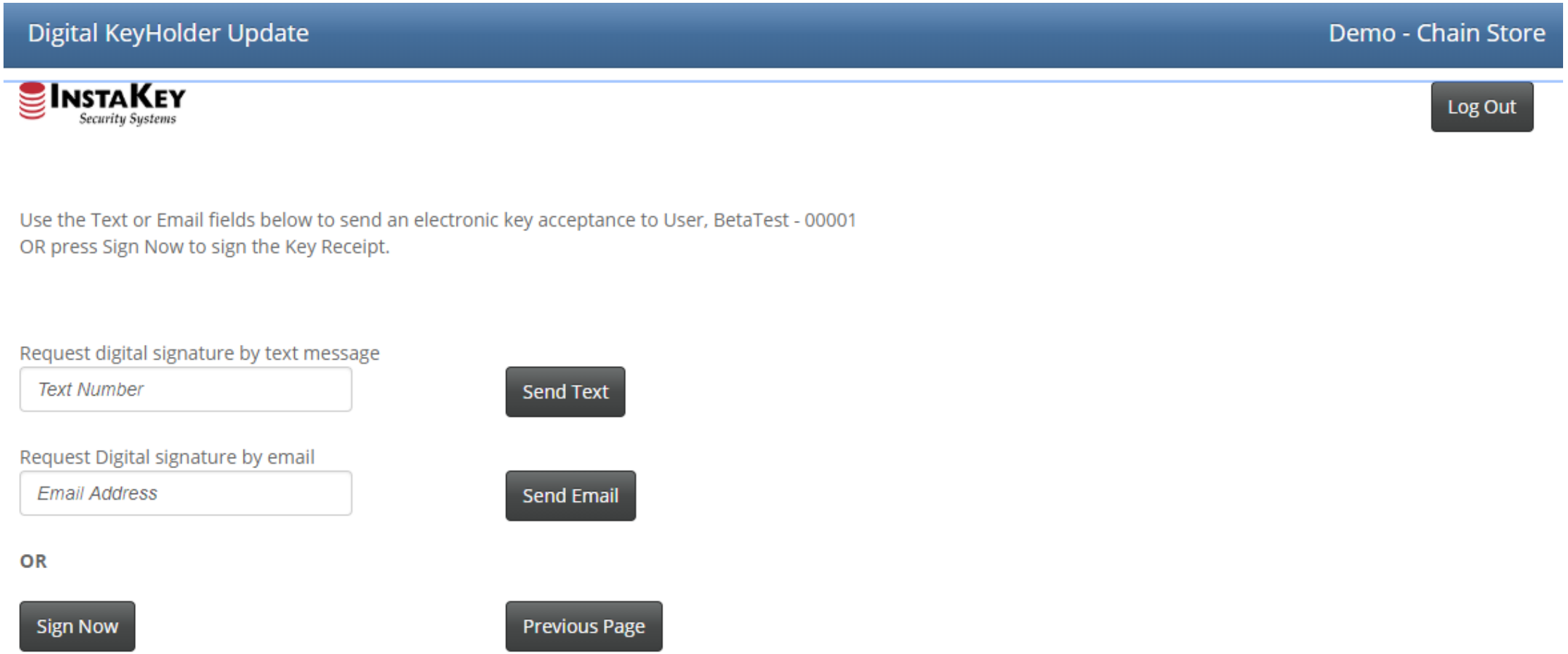
11. A signature request may be sent via text or email to users not on site, or, by pressing "Sign Now" an Esignature pad will allow the key holder to sign for the key on site.



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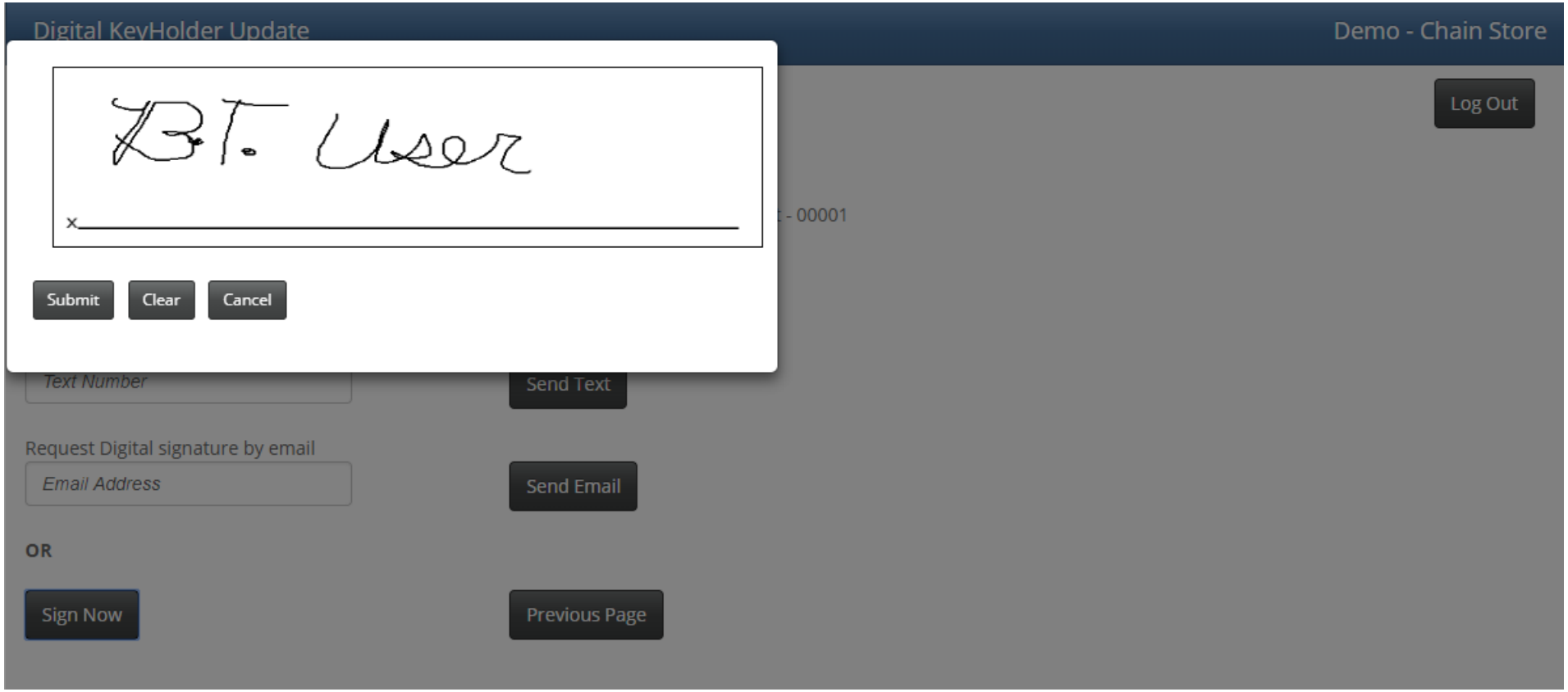
12. Once signed, select to preview the Key Receipt.



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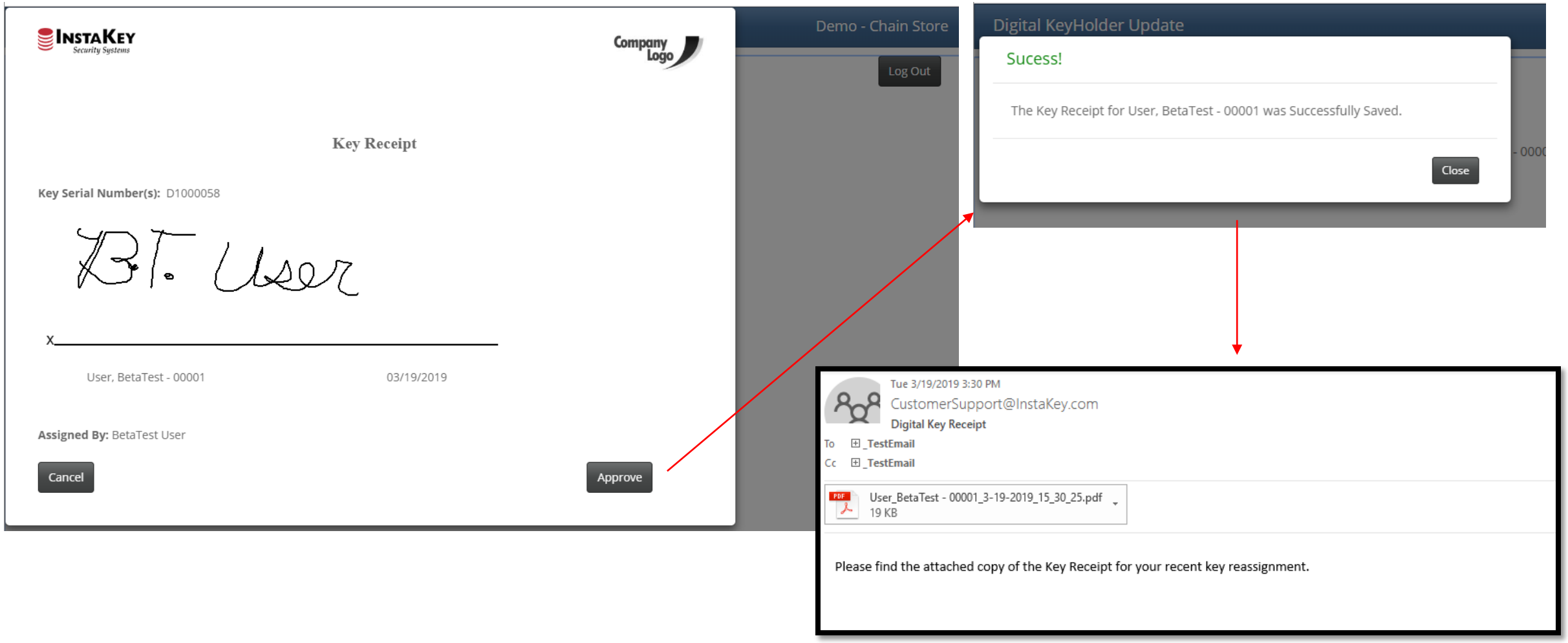

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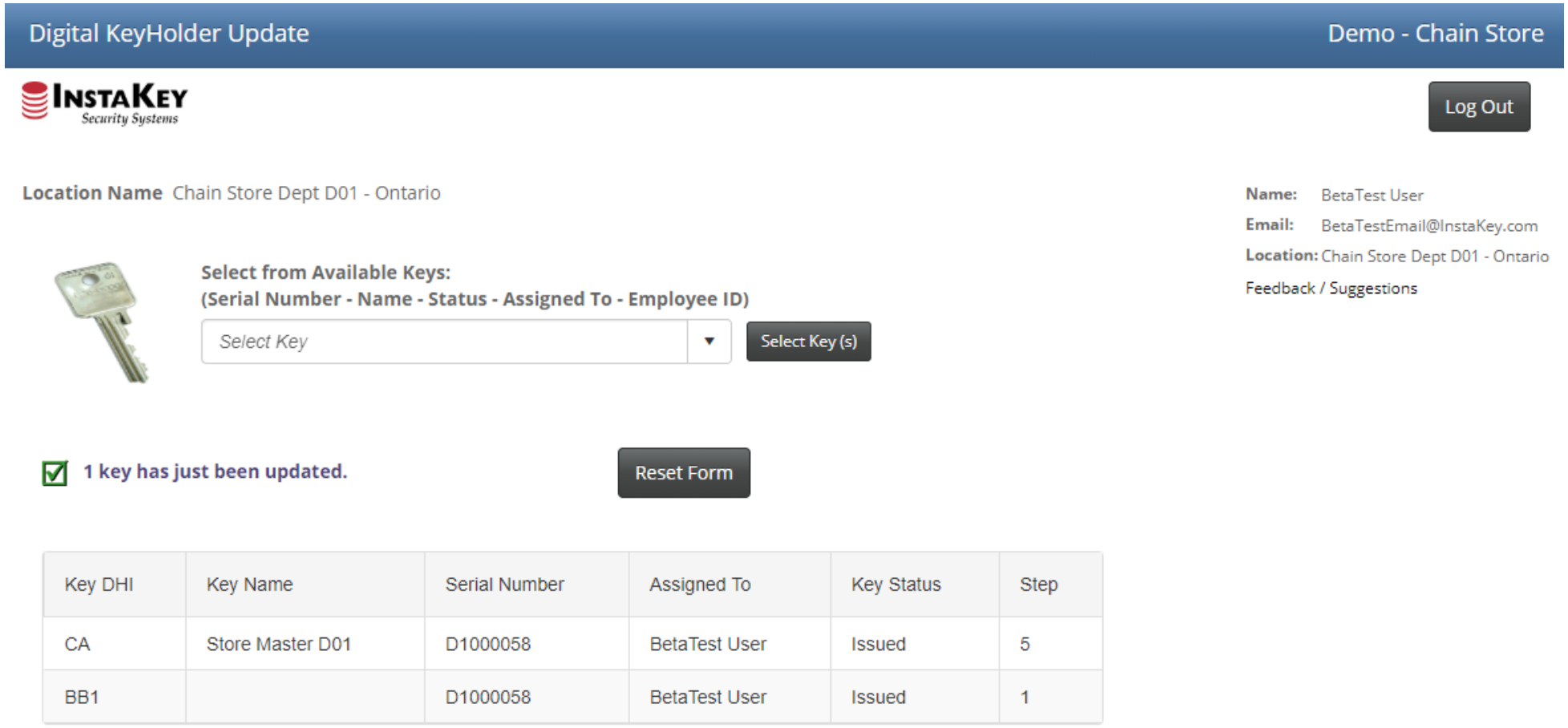

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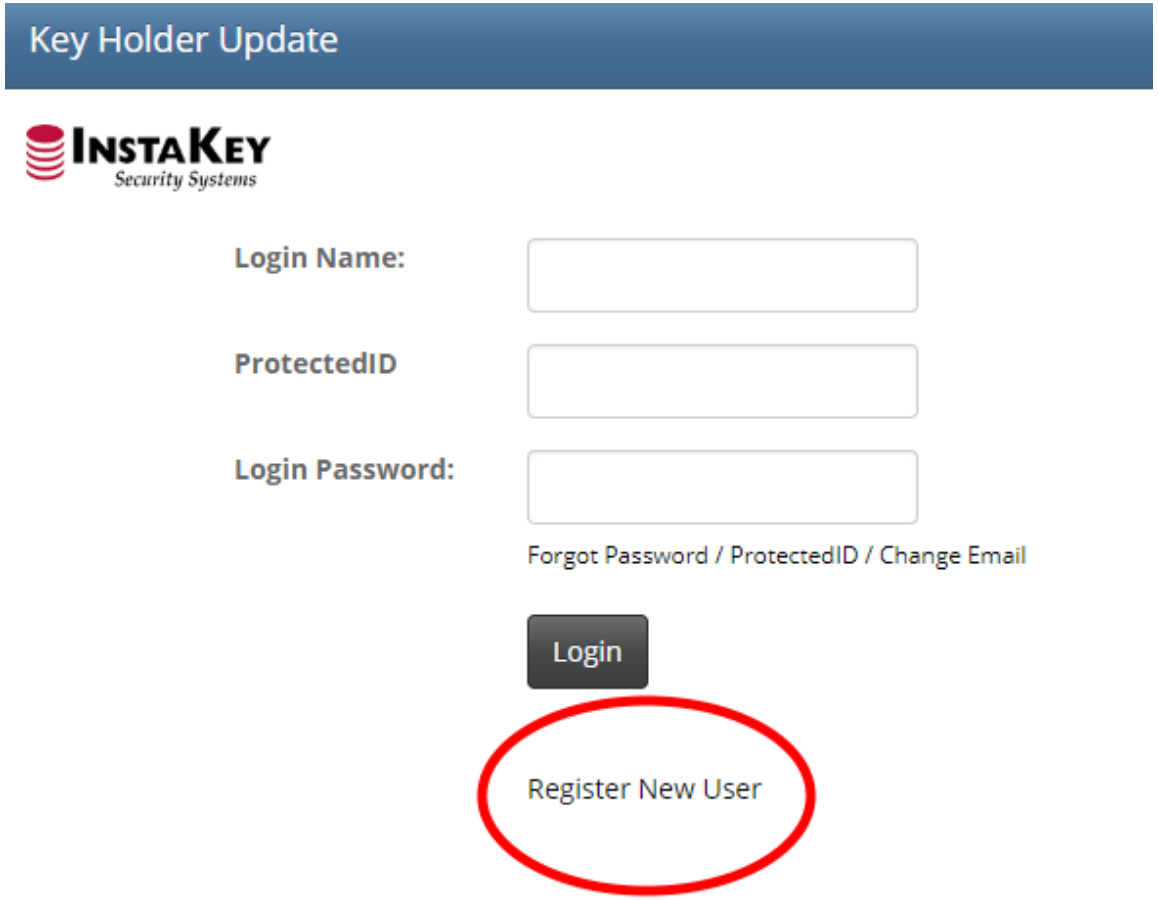

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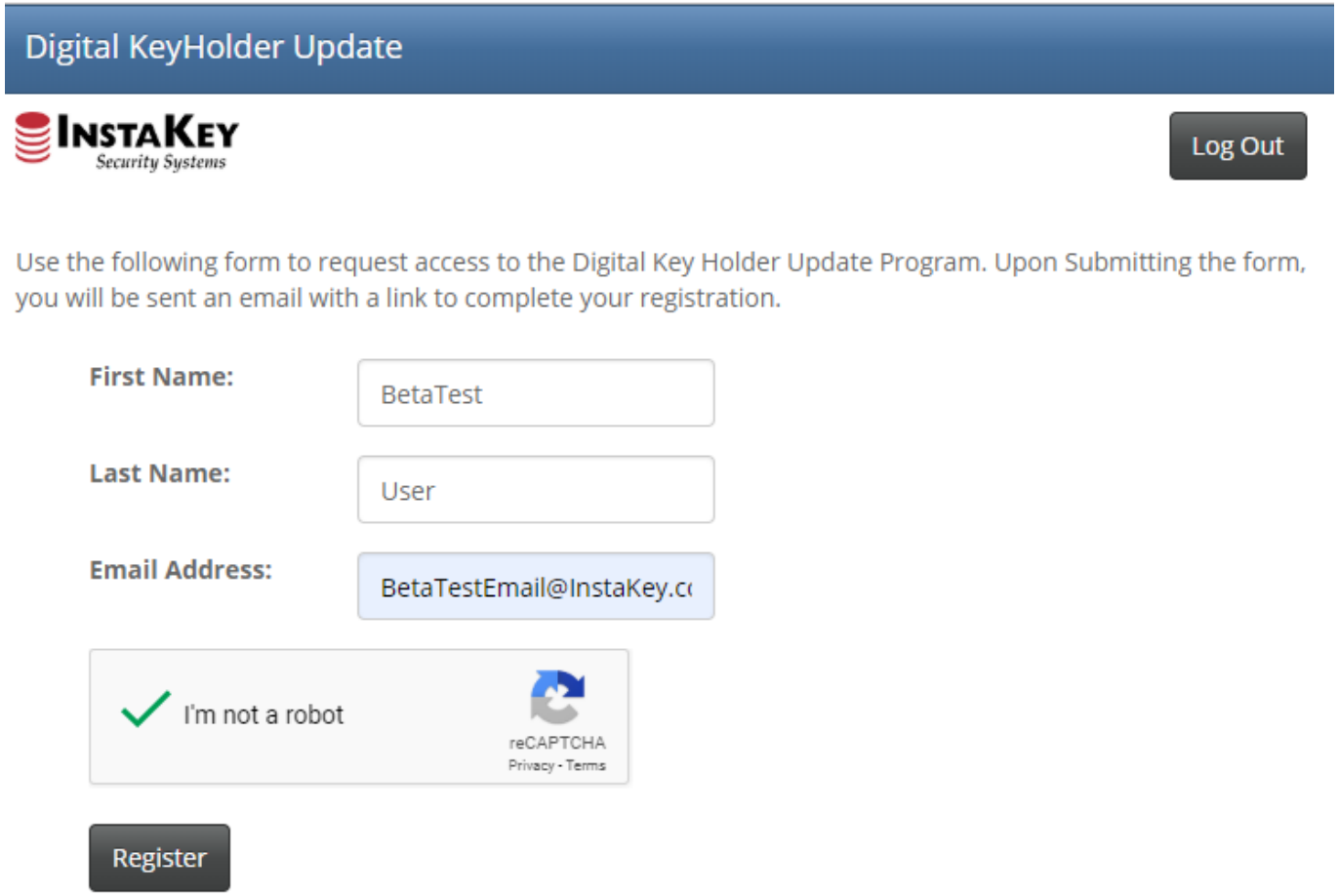

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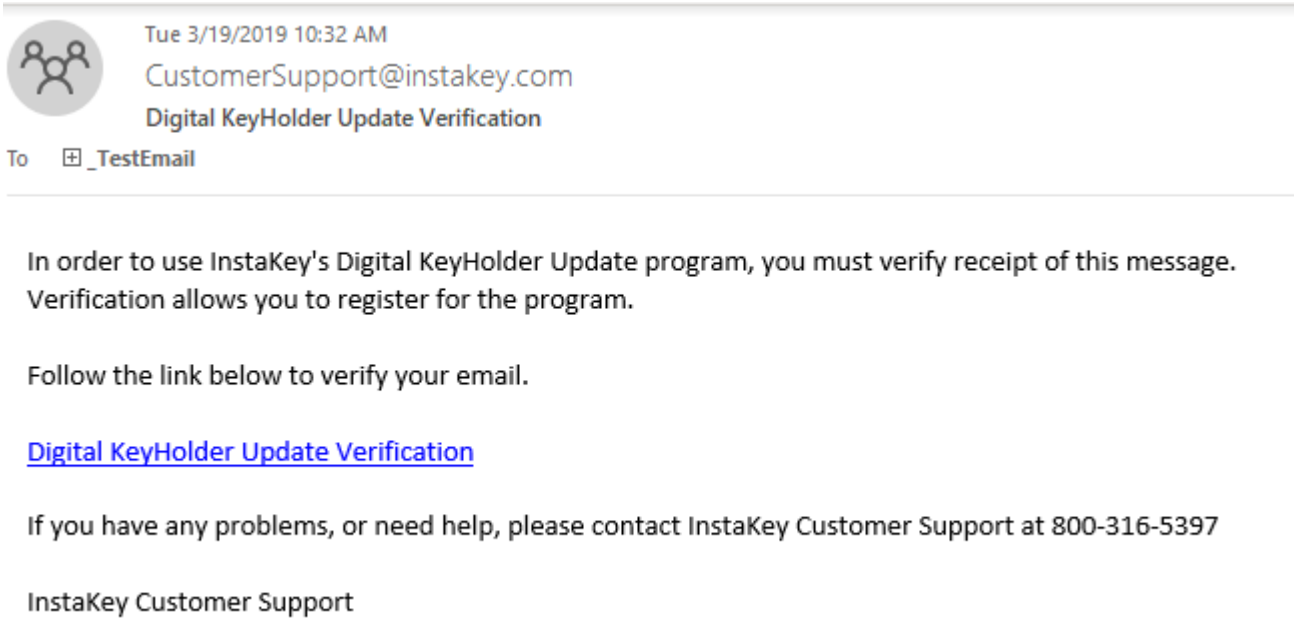

Tue 3/19/2019 10:32 AM

CustomerSupport@instakey.com

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To ⊞ _TestEmail

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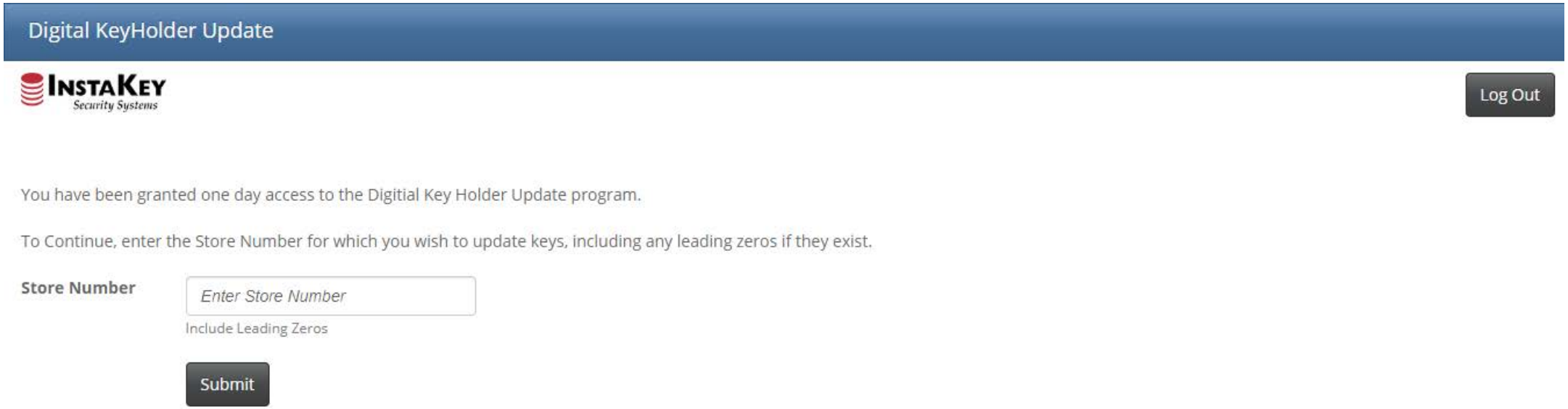
4. As a returning user, selecting the link in the email sent directs to the store select page.



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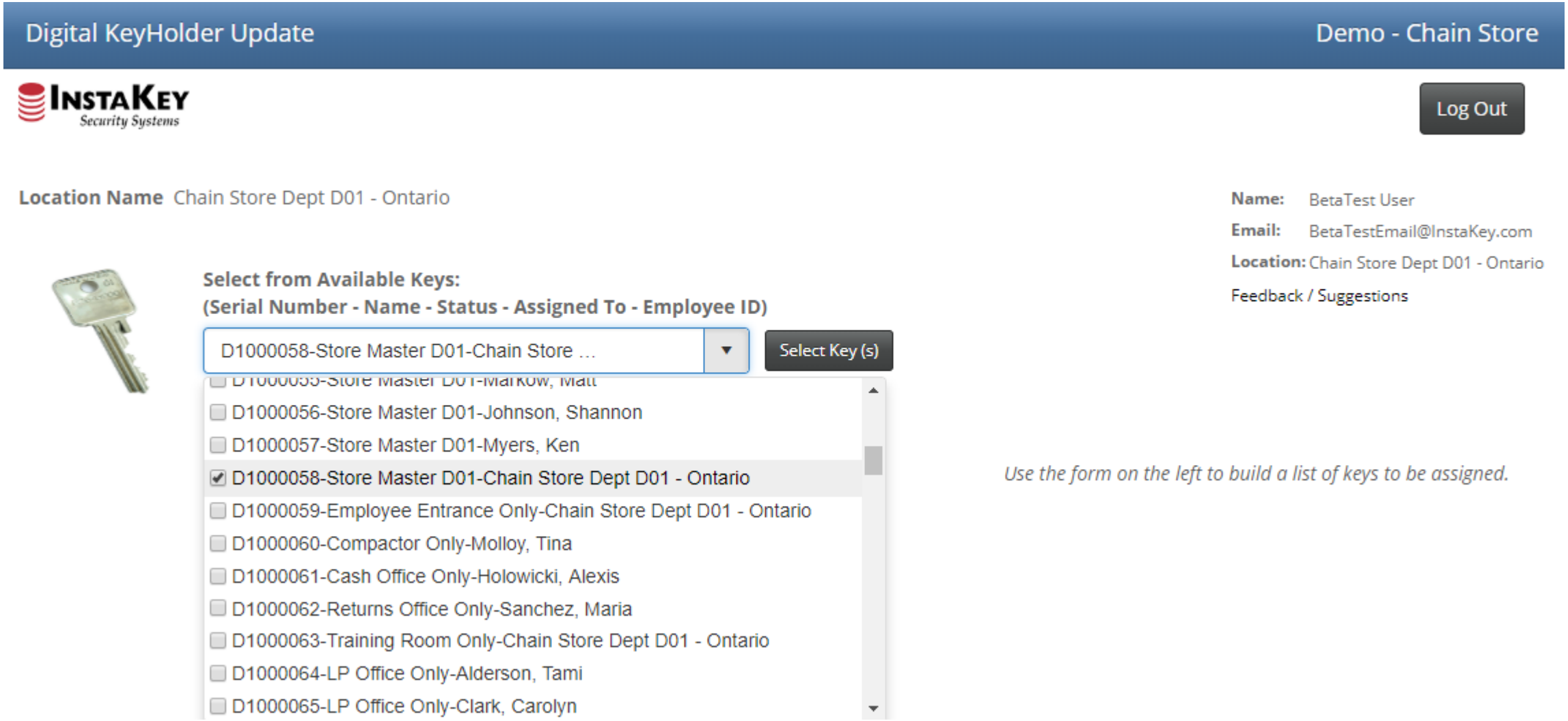

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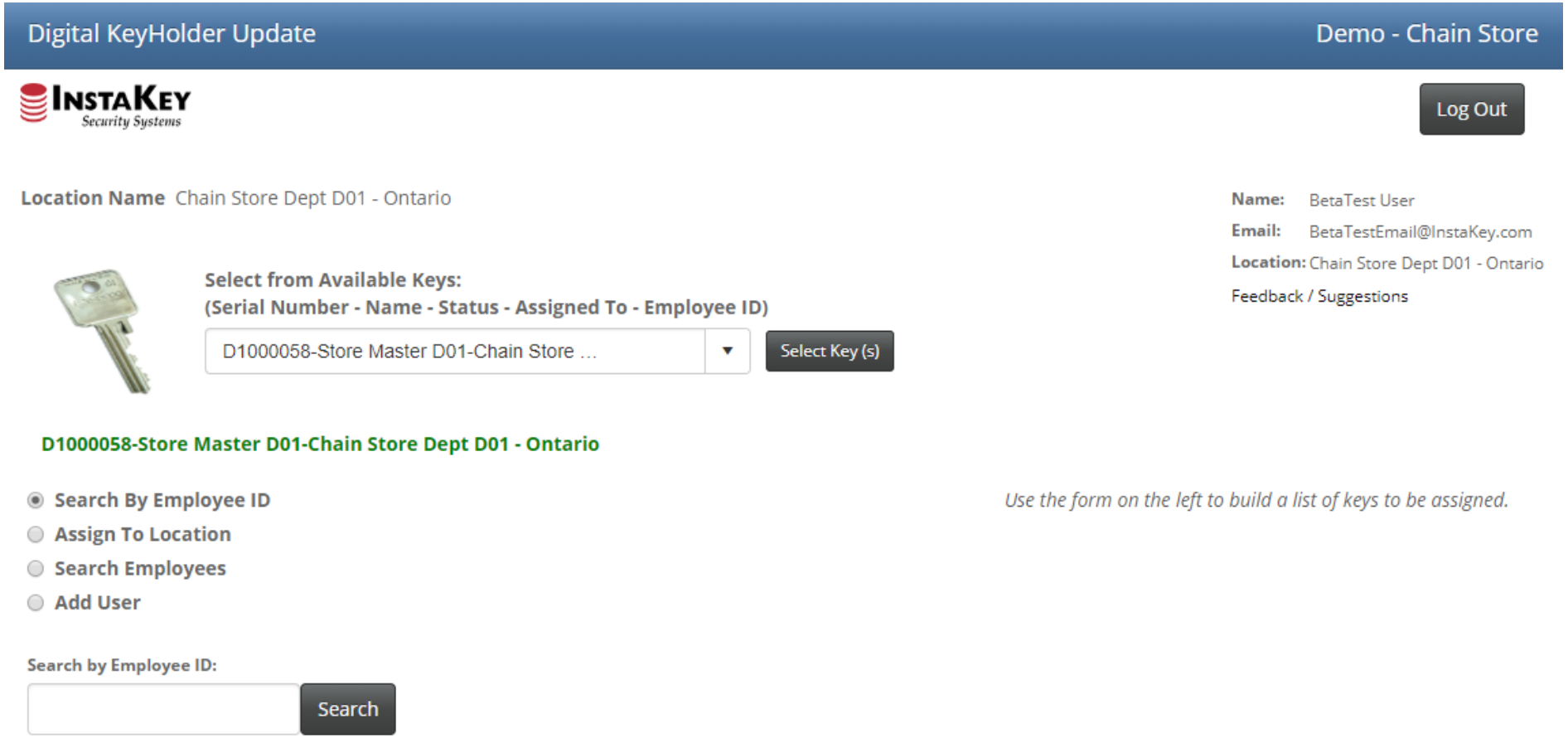

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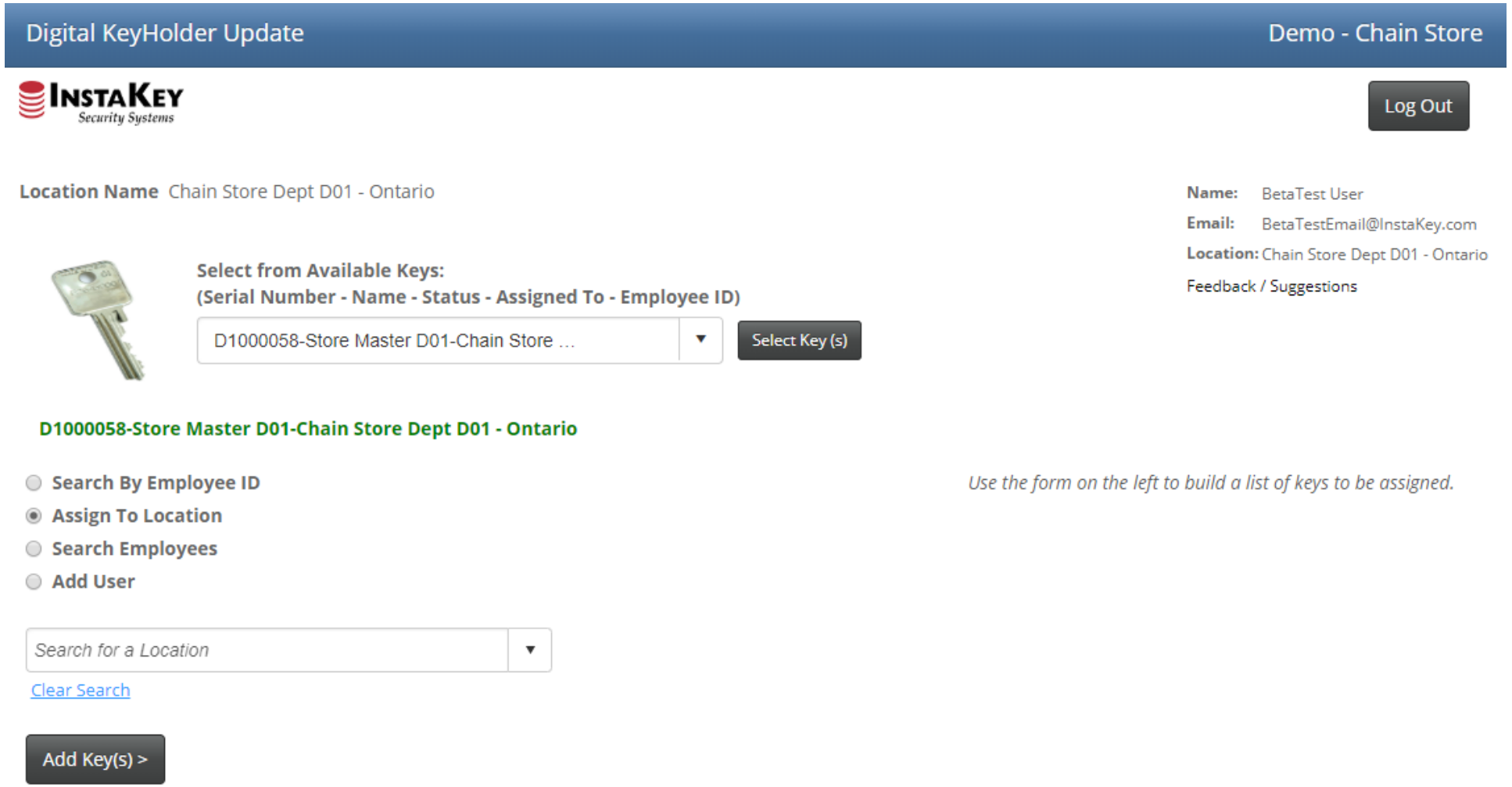

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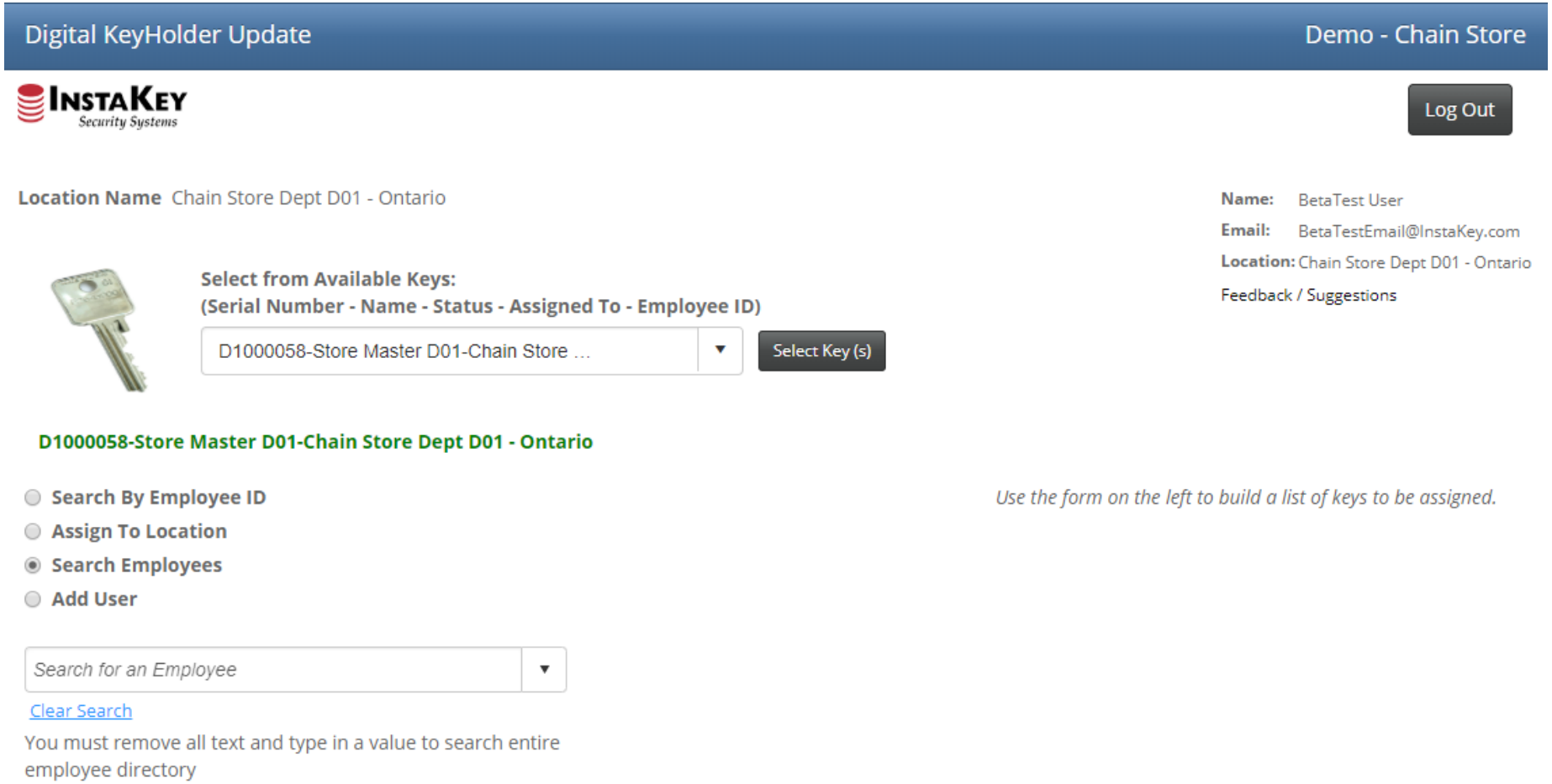

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Digital KeyHolder Update — Demo - Chain Store

Email: BetaTestEmail@InstaKey.com
Location: Chain Store Dept D01 - Ontario
Feedback / Suggestions

Select from Available Keys:
(Serial Number - Name - Status - Assigned To - Employee ID)

Select Key ▼ | Select Key (s)

- ○ Search By Employee ID
- ○ Assign To Location
- ◉ Search Employees
- ○ Add User

User, BetaTest - 00001 ▼

Clear Search

You must remove all text and type in a value to search entire employee directory

Add Key(s) >

Keys to Be Assigned: 1

Serial Number(s)	Issue To	Remove	E-Signature
D1000058	User, BetaTest - 00001	☒	E-Sign

Submit Key Log Update

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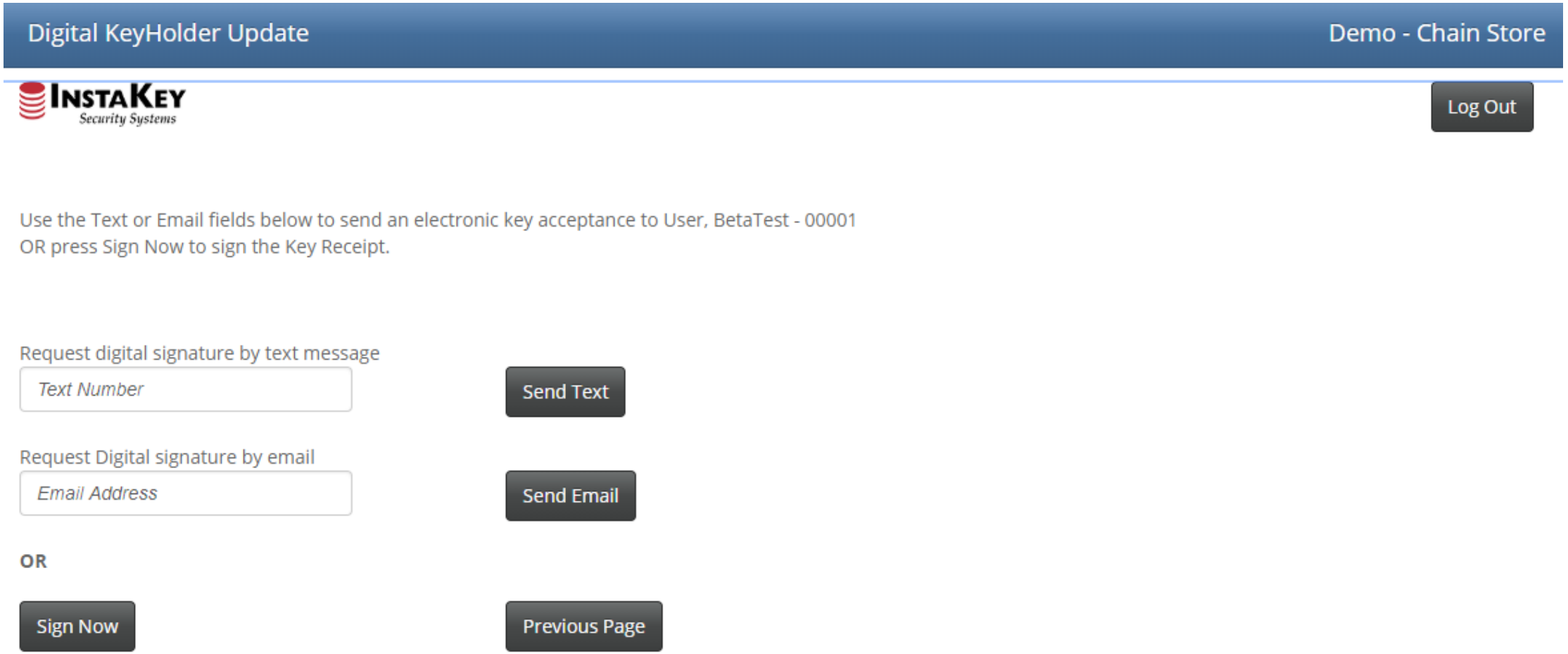

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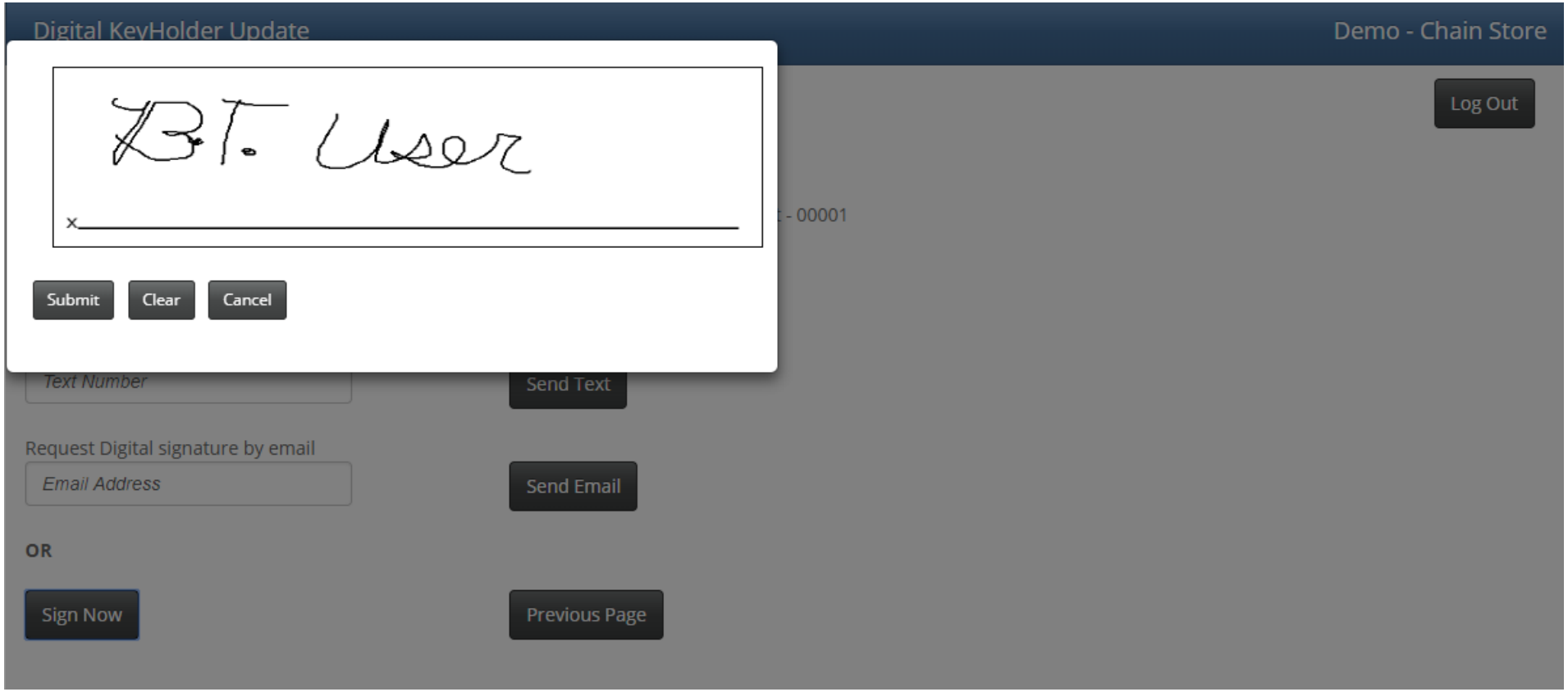

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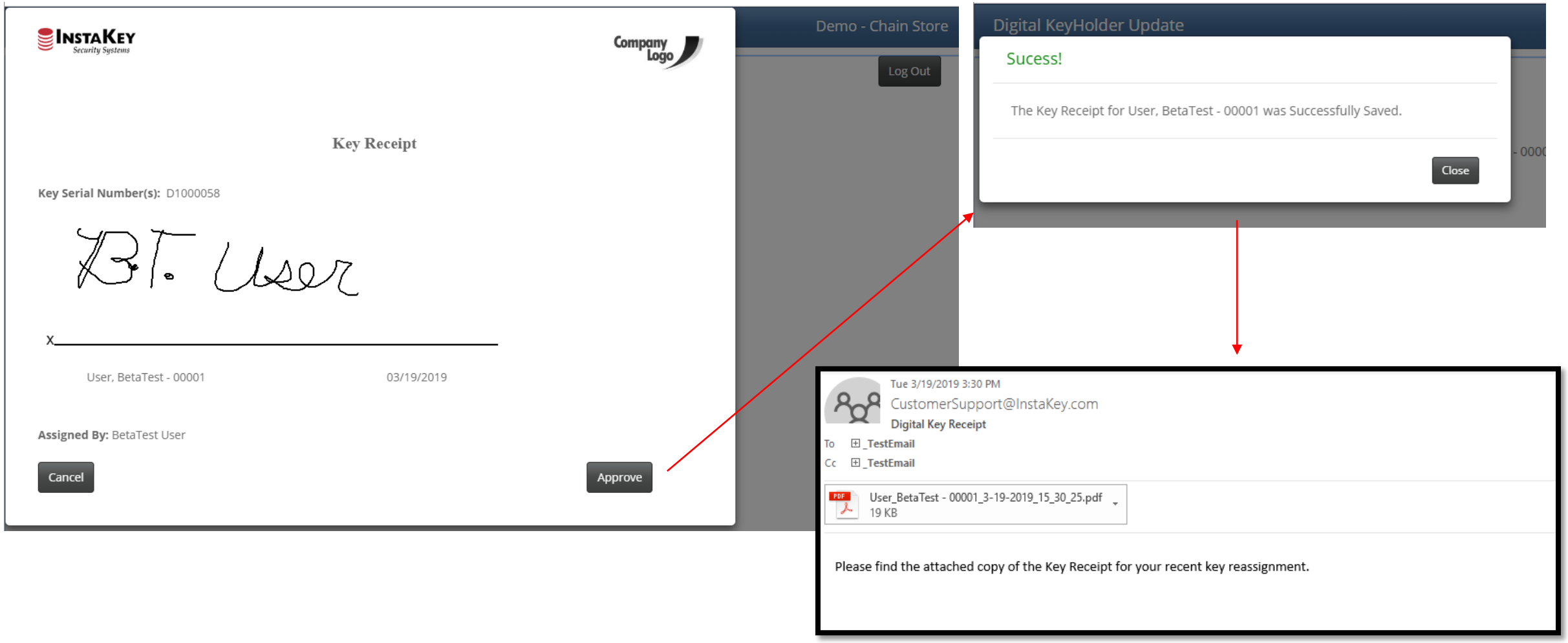

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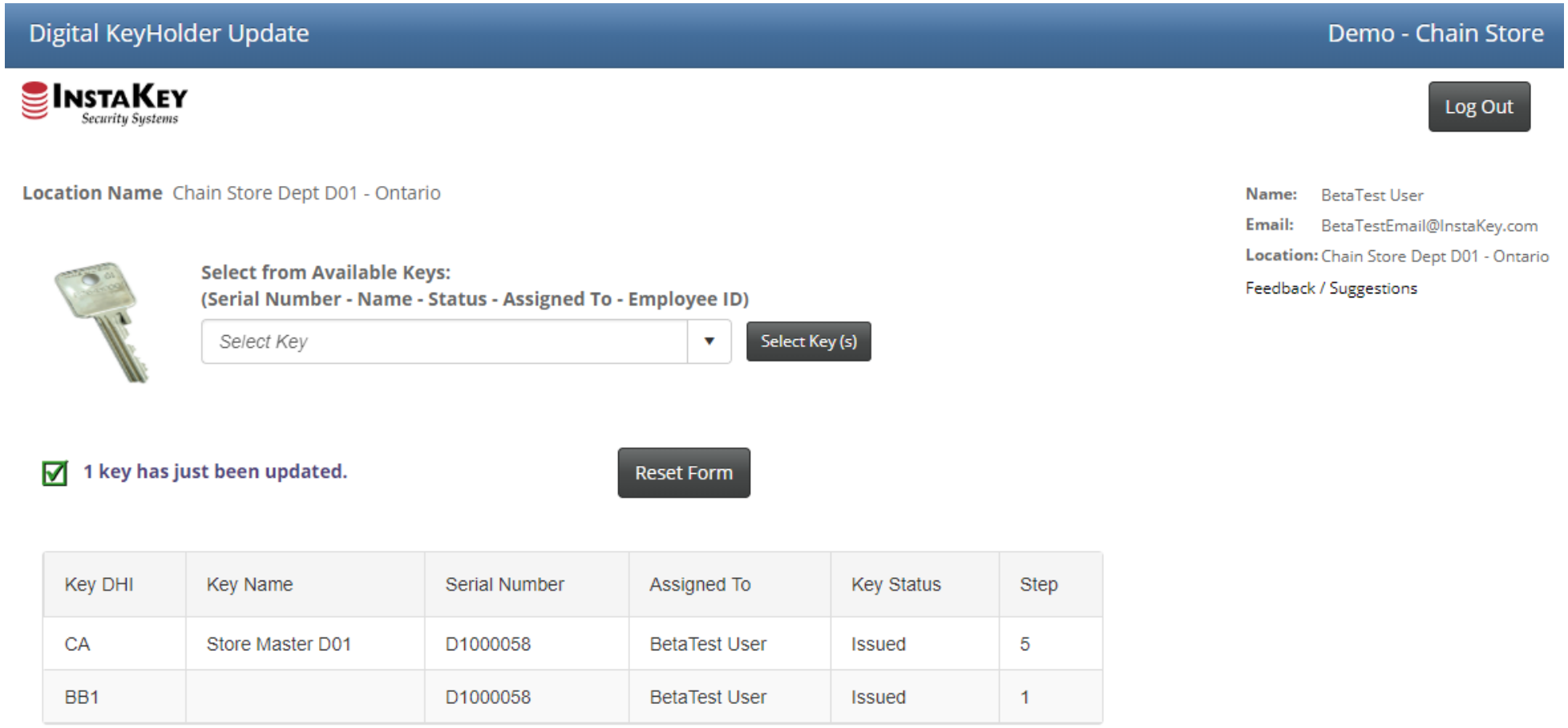

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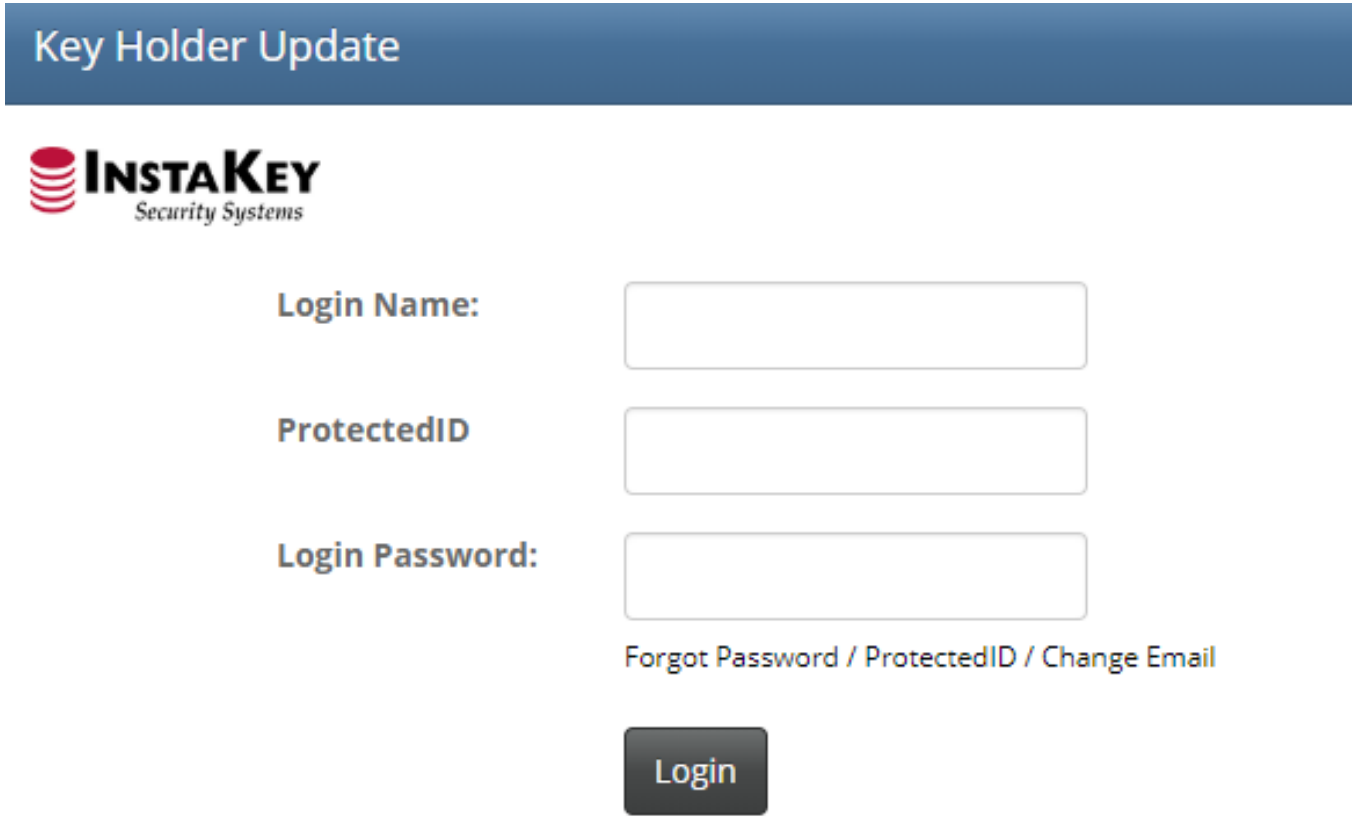

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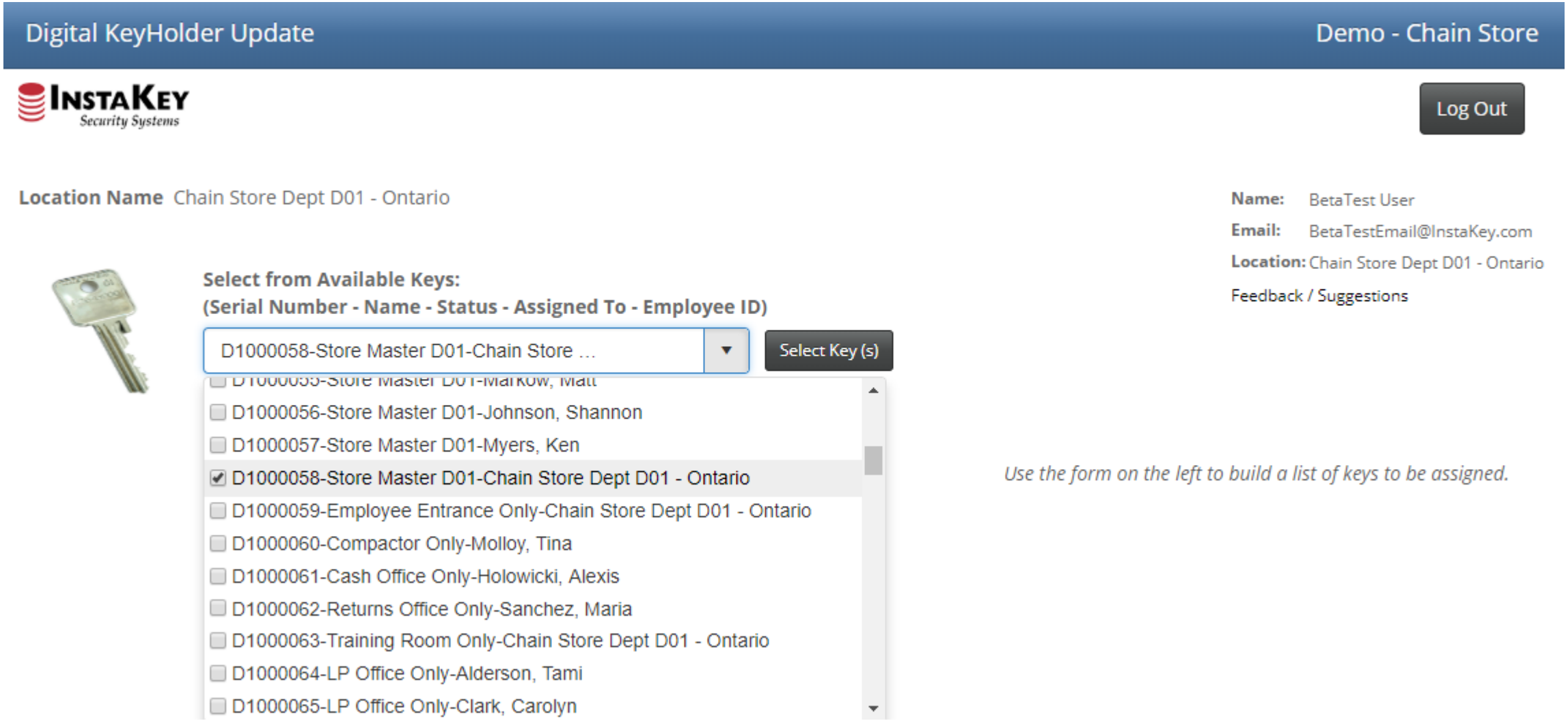

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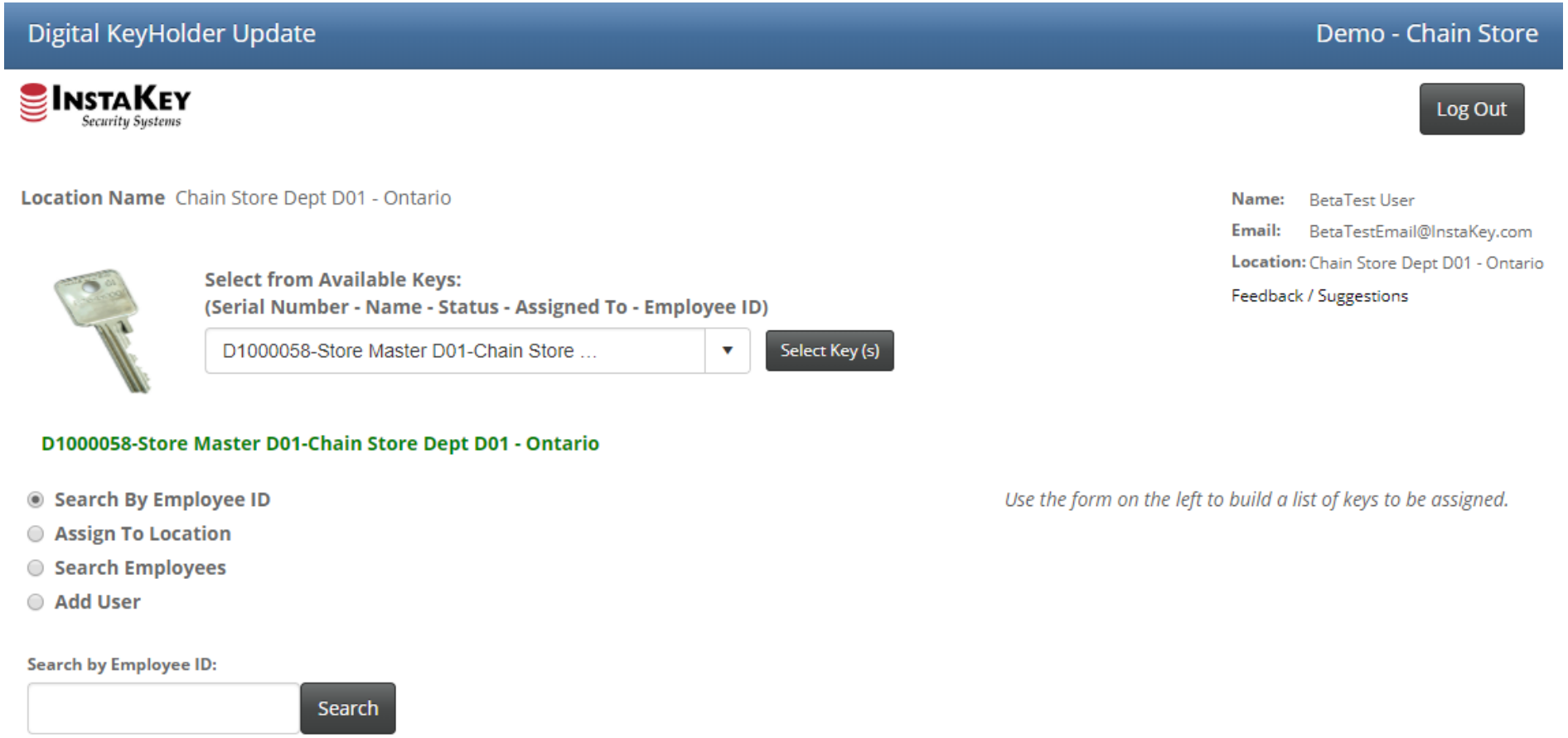

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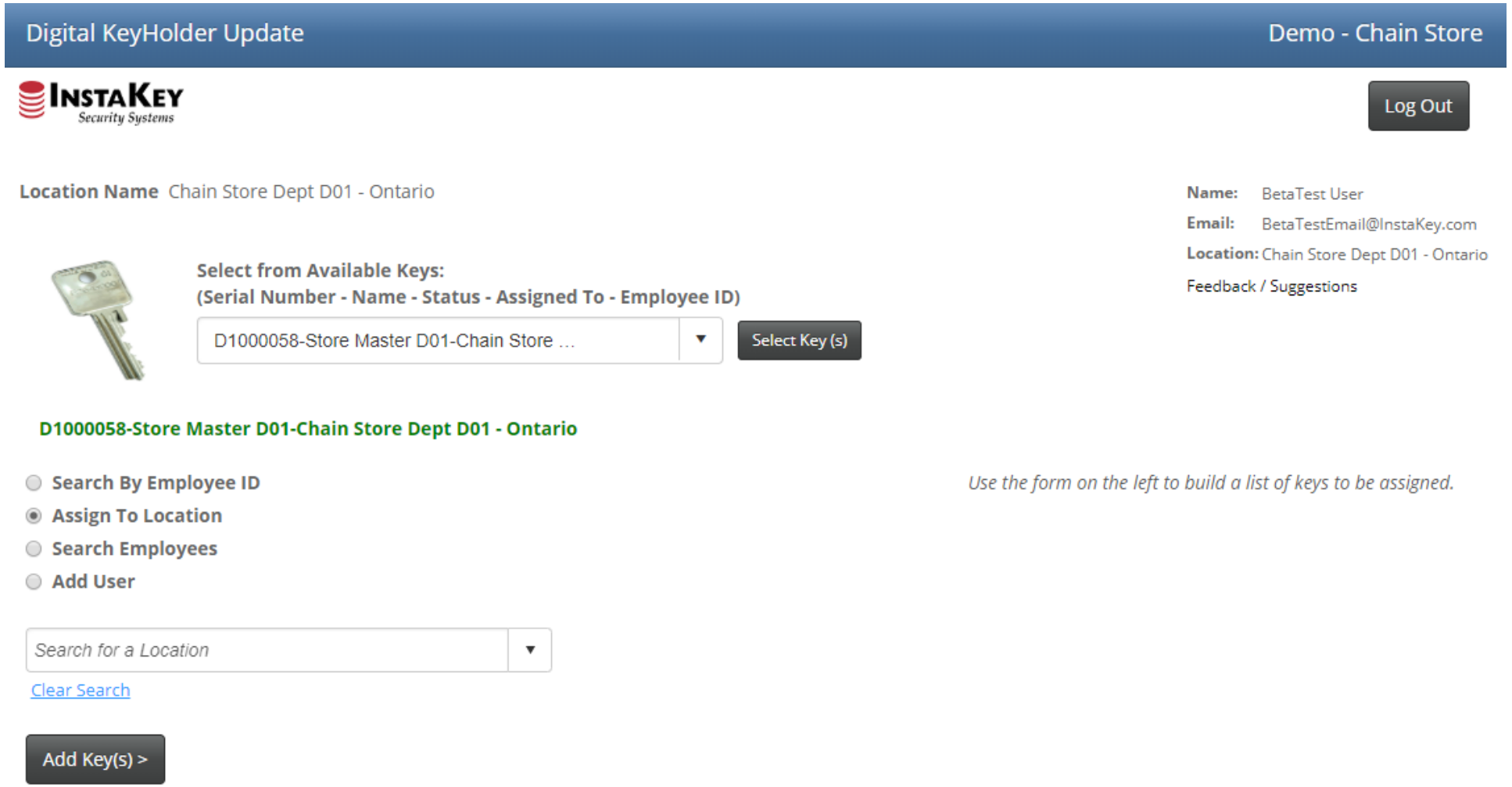

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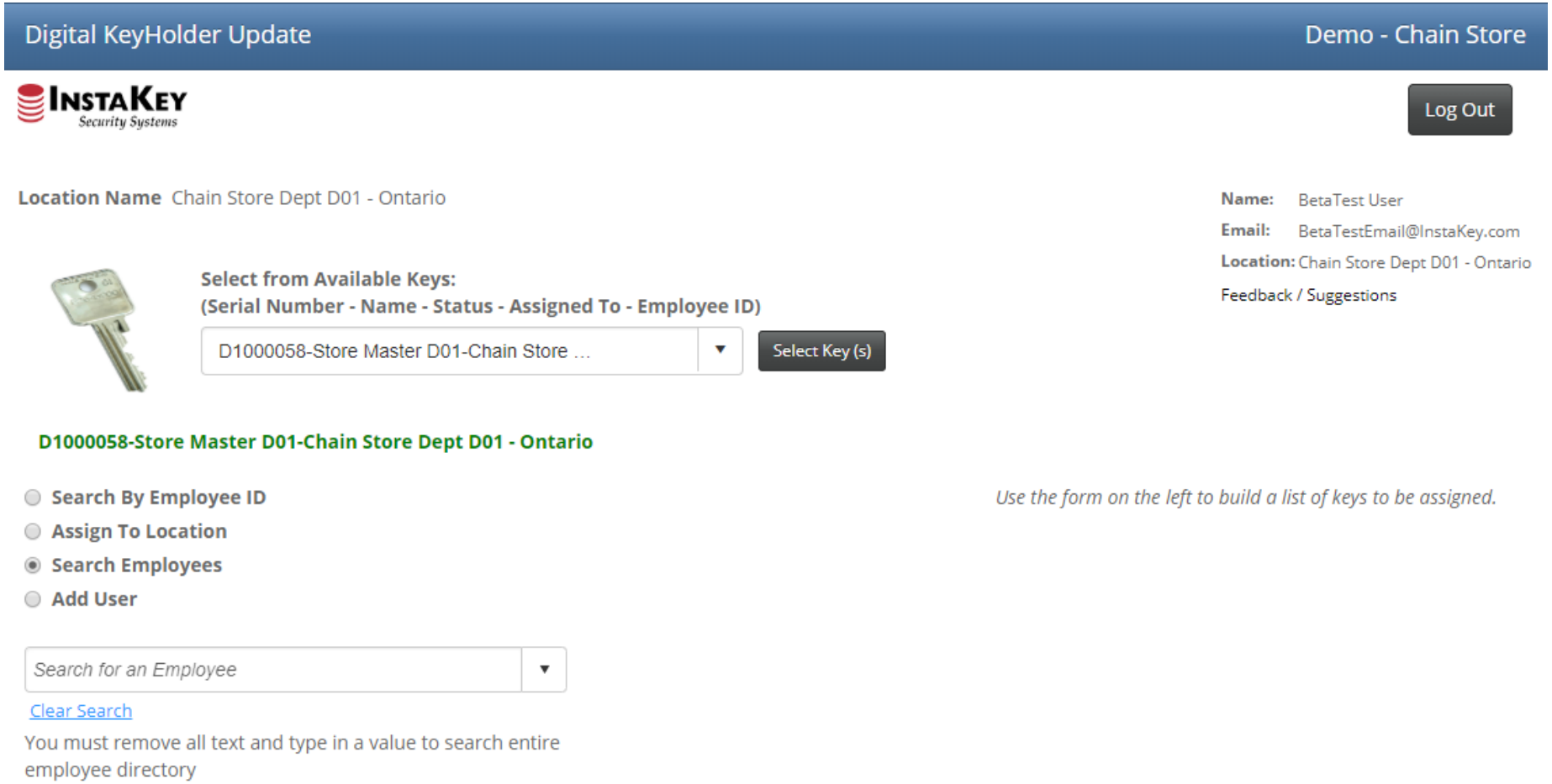

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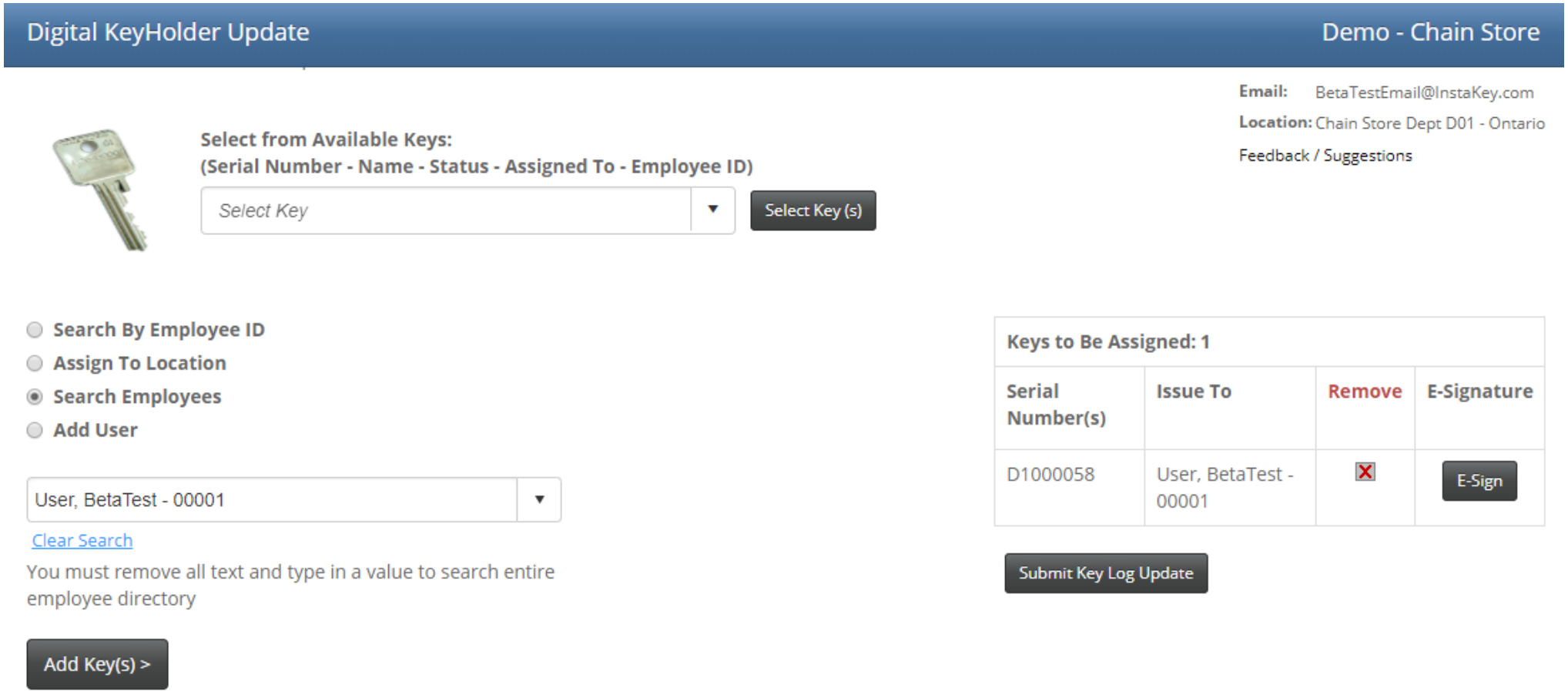

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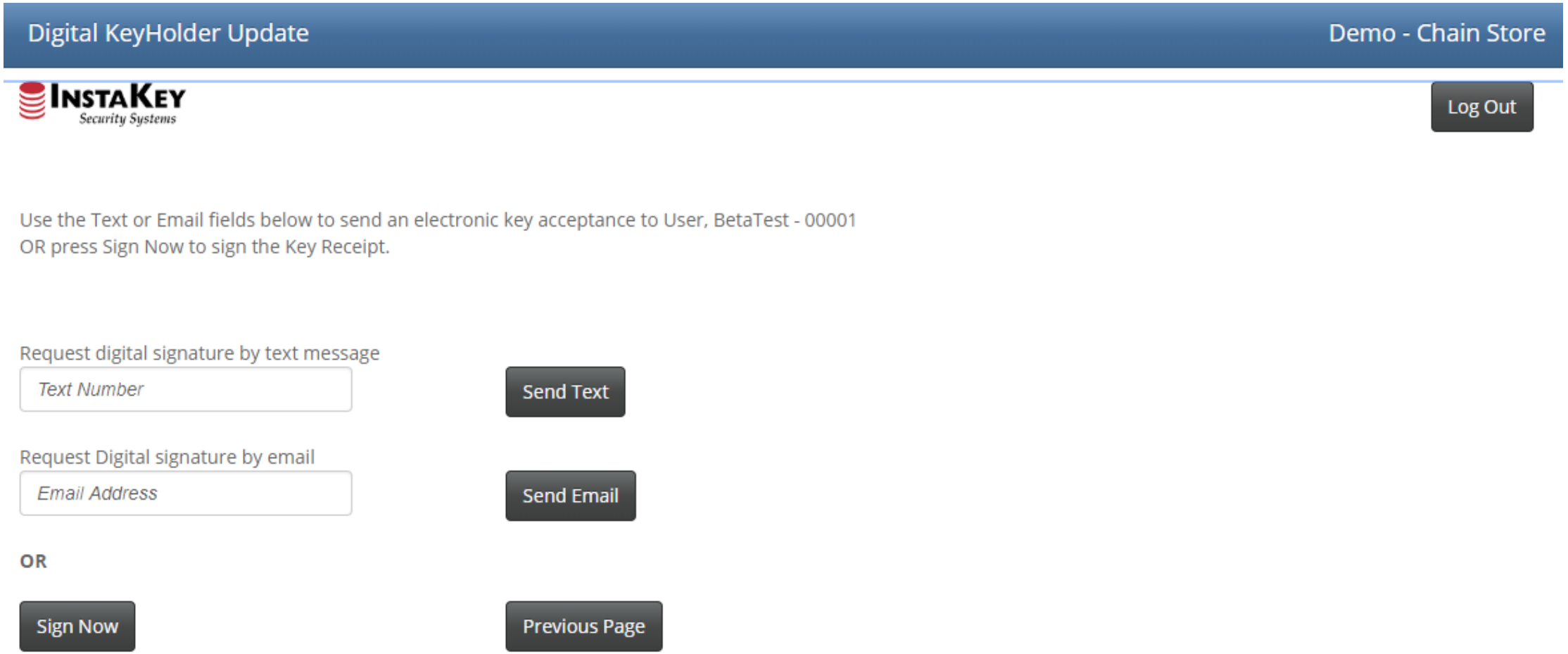
7. A signature request may be sent via text or email to users not on site, or, by pressing "Sign Now" an Esignature pad will allow the key holder to sign for the key on site.



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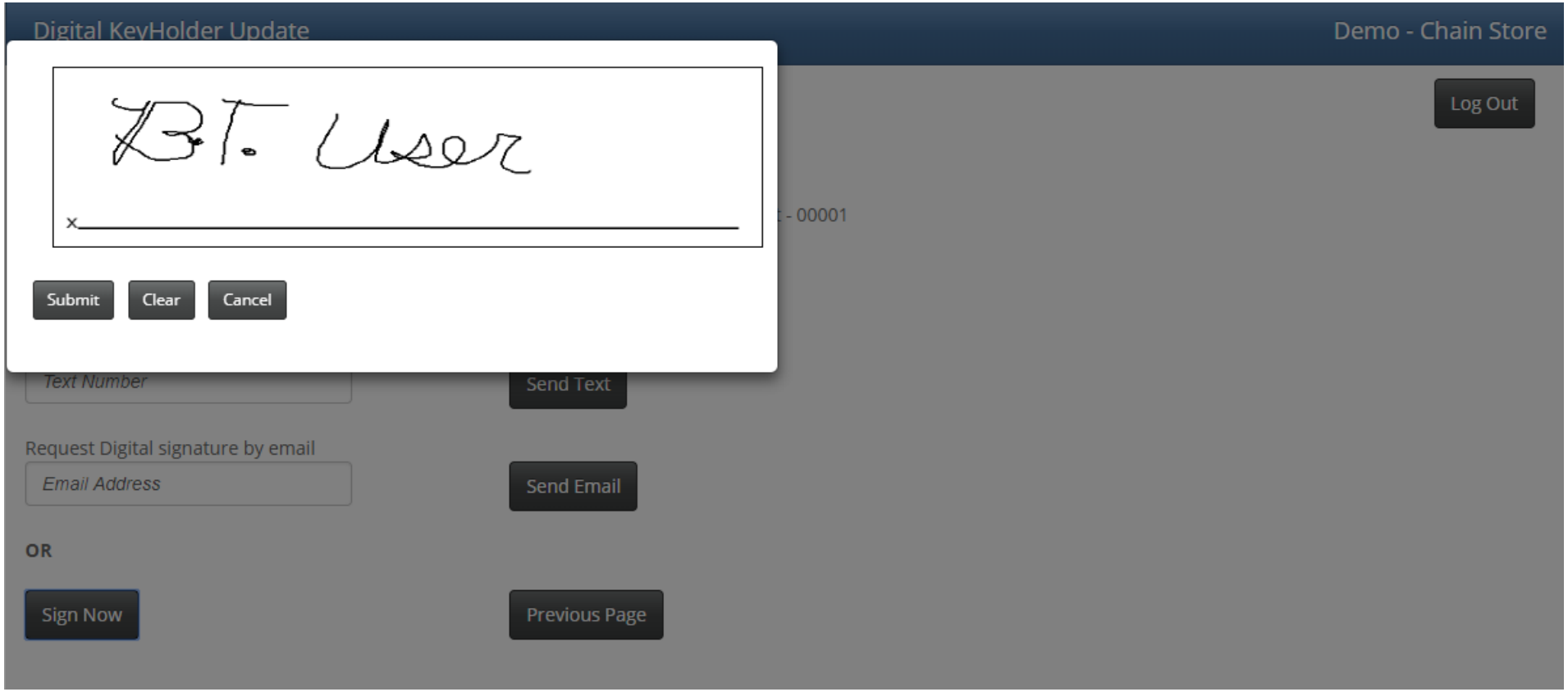
8. Once signed, select to preview the Key Receipt.



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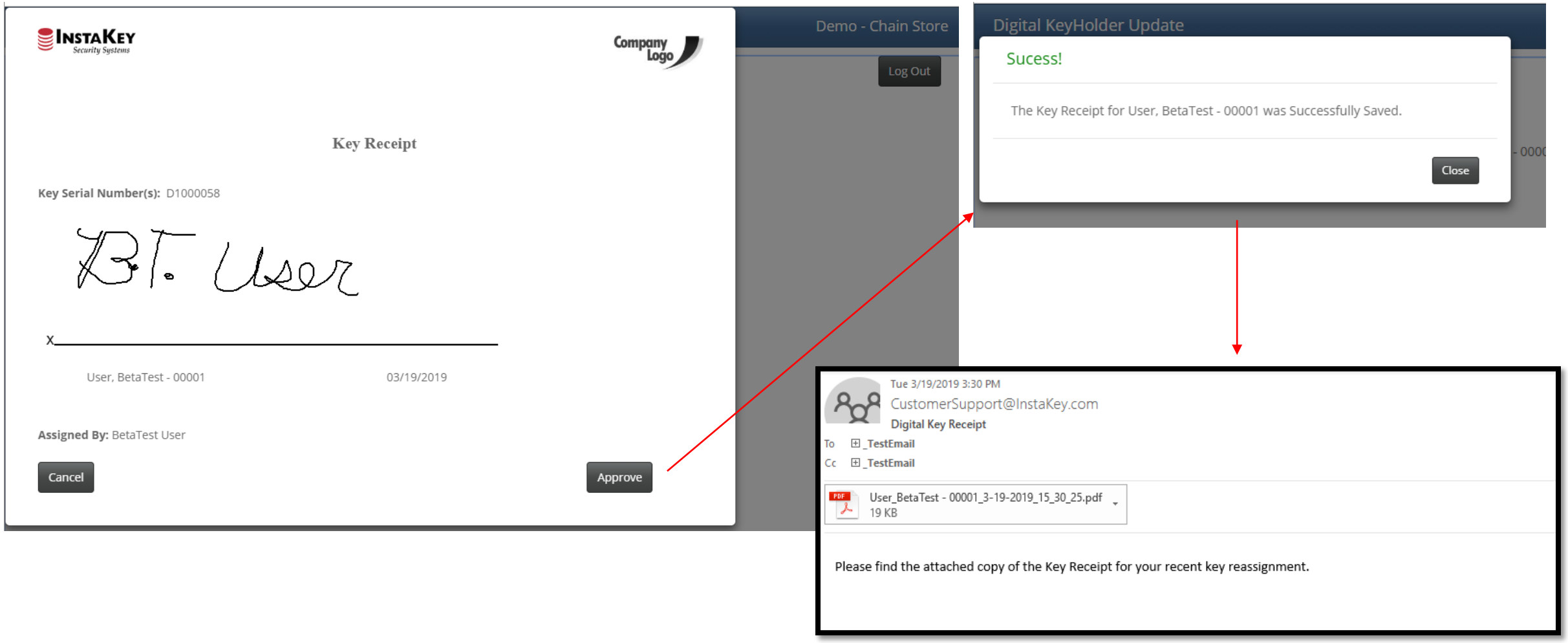
9. This signature will be attached to a PDF and will display in the Key Receipt below. Click Approve to attach the key receipt to the User in SecurityRecords. A copy will also be sent both to the key holder and person assigning the key.



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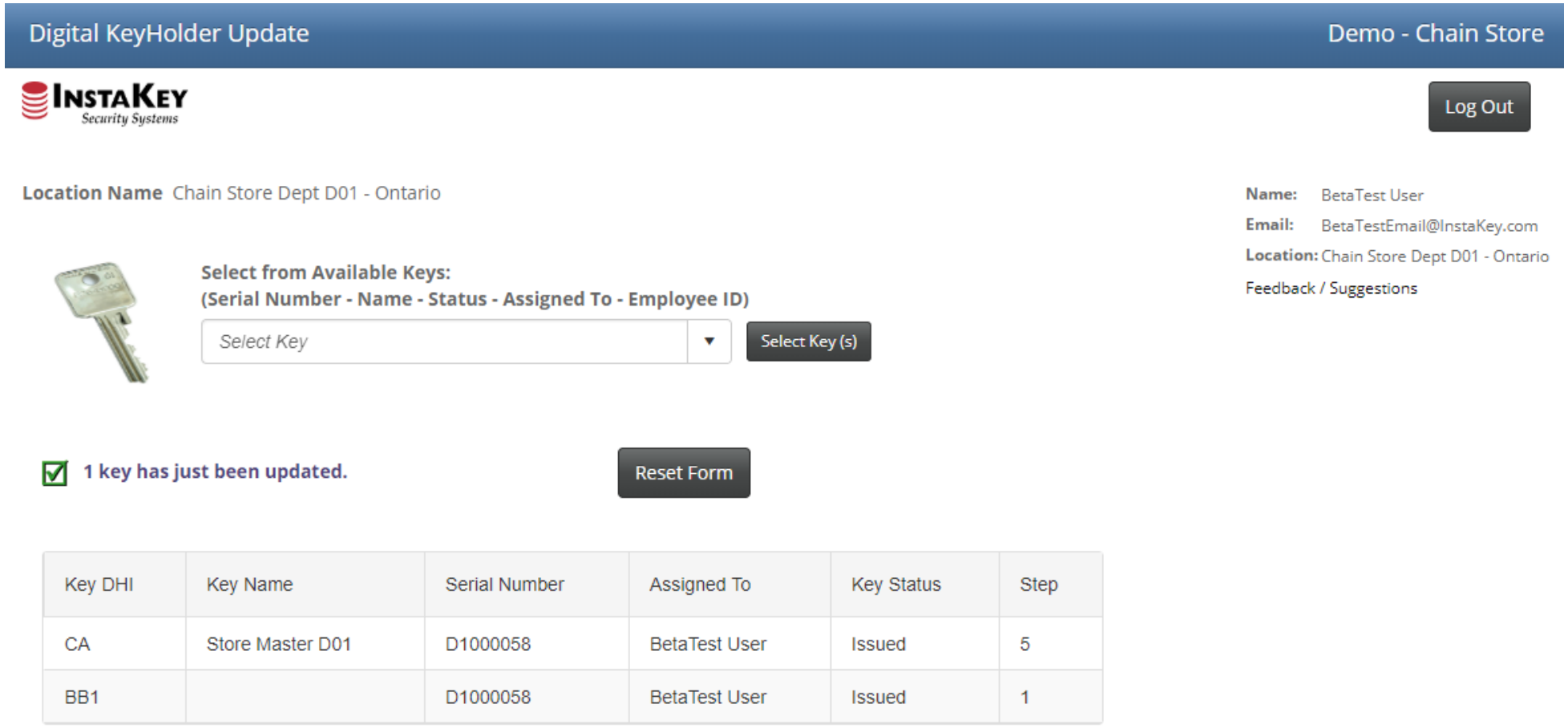
10. Once all keys are signed for press Submit Keys to see a list of newly assigned keys & all keys belonging to this store/branch. Log Out if complete, or start back at the Select Keys dropdown for another assignment.



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