

# **Settlement Room User and Account Maintenance**

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## Contents

|  |           |
|--|-----------|
| <b>1. Features and Brief Descriptions of Settlement Room .....</b> | <b>4</b>  |
| <b>2. Login .....</b>  | <b>5</b>  |
| 2.1 Forgotten Password .....                                       | 7         |
| <b>3. Settlement Room Behaviours .....</b>                         | <b>9</b>  |
| <b>4. User Account Maintenance.....</b>                            | <b>10</b> |
| 4.1 User Account Maintenance - Change Password.....                | 10        |
| 4.2 User Account Maintenance – Update my Profile.....              | 12        |
| 4.3 User Account Maintenance – Change Username .....               | 14        |
| 4.4 User Account Maintenance – Switch Accounts .....               | 16        |
| <b>5. Account Administrator Maintenance.....</b>                   | <b>18</b> |
| 5.1 Add User .....   | 20        |
| 5.2 Manage Users.....  | 23        |
| 5.3 Change Status .....  | 25        |
| 5.4 Reset Password.....  | 27        |
| 5.5 Update Profile.....  | 30        |
| 5.6 Change Username .....  | 32        |
| 5.7 Manage Groups .....  | 34        |
| 5.7.1 Add Group Name .....   | 34        |
| 5.7.2 Edit Group Name .....  | 36        |
| 5.7.3 Edit Members within a Group (Add Members).....               | 38        |
| 5.7.4 Edit Members within a Group (Remove Members) .....           | 40        |
| 5.7.5 Remove Group.....  | 42        |

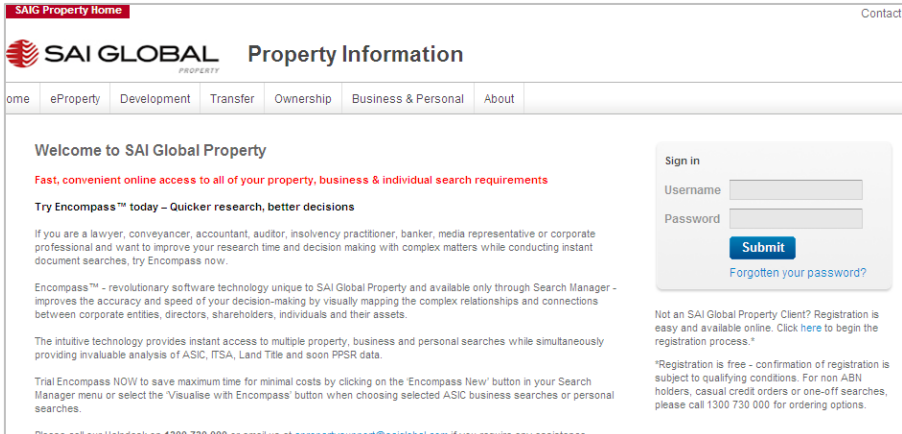

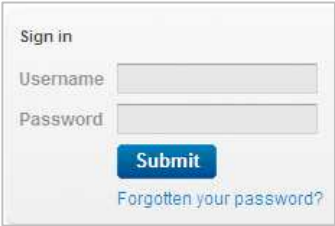
## 1. Features and Brief Descriptions of Settlement Room


| Feature                       | Description   |
|-------------------------------|---|
| <b>Settlement Room</b>        | Settlement Room is a transaction workspace where all parties in a settlement can gather online to share, compare and agree on information prior to actual settlement. |
| <b>Results &amp; Billing</b>  | <b>Results &amp; Billing</b> allows users to view orders & Results, run invoices & billing reports and organise schedule billing / transactional reports              |
| <b>Account Administration</b> | <b>Account Administration</b> allows account administrators to maintain account and User details within their account.  |



Complete the steps below to login to **Settlement Room**.

The process time should only take a couple of seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action  |
|---|---|
| 1   | Go to <a href="https://login.property.saiglobal.com/servlet/CSMLLogin">https://login.property.saiglobal.com/servlet/CSMLLogin</a><br> |
| 2   | On the right hand side of the page enter in <b>Your Username</b> .  |
| 3   | Enter in your <b>Password</b> .   |
| 4   | Click on <b>Submit</b> .  |
| <div style="display: flex; align-items: flex-start;"> <div style="flex: 1;">  <p><b>Password Requirements are 8 – 30 Characters.</b></p> <p>Please note: If a user has forgotten their password, the user can type in their username and click on 'Forgotten your Password' on the login page. An email link will be emailed to the user. The user will need to follow the prompts to update their password.</p> </div> <div style="flex: 1;">  </div> </div> |   |



**If multiple users use the same email address an error message will appear, the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.**

## 2.1 Forgotten Password

| Glossary         |  |
|------------------|--|
| Password         | Depending on the accounts security profile. The default profile that applies to almost everyone has a <b>password</b> between 8 and 30 characters.   |
| Security Setting | SAI Global Properties <b>Standard Security Settings</b> are:<br><br>Session Timeout 90 minutes;<br>Minimum Password Length 8 characters;<br>Maximum Password Length 30 characters;<br>Password Expiry 0 days;<br>Password Expiry Notification 5 days;<br>Password Reuse History 3 days;<br>Password Attempts 5;<br>User Lock Out Duration 5 minutes. |



### Notes

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Complete the steps below for **Forgotten Password at Login**.

The process time should only take 2 minutes. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step   | Action  |
|--|---|
| 1  | Go to <a href="https://login.property.saiglobal.com/servlet/CSMLLogin">https://login.property.saiglobal.com/servlet/CSMLLogin</a> |
| 2  | On the right hand side of the page click on ' <b>Forgotten your password?</b> '   |
| 3  | Enter in your <b>Username</b> or <b>Email Address</b> .   |
| 4  | Click on <b>Submit</b> .  |
| 5  | An <b>Email</b> will be sent to the users email address.  |
| 6  | Follow the <b>Prompts</b> from the reset password email.  |
|  Password requirements are between 8-30 Characters. |   |



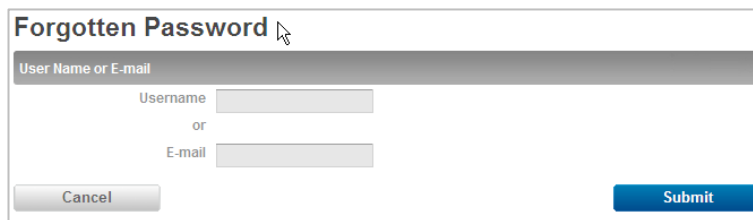
Sign in

Username

Password

**Submit**

[Forgotten your password?](#)



**Forgotten Password**

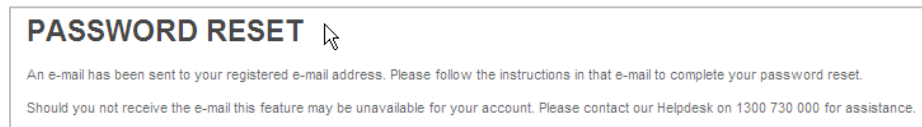
User Name or E-mail

Username

or

E-mail


**Cancel** **Submit**



**PASSWORD RESET**

An e-mail has been sent to your registered e-mail address. Please follow the instructions in that e-mail to complete your password reset.




Should you not receive the e-mail this feature may be unavailable for your account. Please contact our Helpdesk on 1300 730 000 for assistance.



**If multiple users use the same email address an error message will appear, the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.**



### 3. Settlement Room Behaviours

| Glossary  |  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
|---|--|----------------------------------|-------------------------------------|---------------------|------|------------------|--------------|----------------|------------------|------------|--------------|--|----------|-------------------------|---------------------------|-------------------------|--|----------------------------|--|--------------------------|--|-----------|--|-----------------------|--|
| Home  | When the user clicks on <b>Home</b> it will take the user to SAI Global's Settlement Room homepage. The user will be able to view Recent Matters and the Latest News.  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Account Administration  | <p><b>Account Administration</b> link can only be seen by an Account Administrators. This link is found at the top of the homepage. When the Account Administrator clicks on the link the user will have access to updating the Companies Account and User Details.</p> <table border="1" data-bbox="513 593 1359 1122"> <thead> <tr> <th>Account Administrator Can Update</th> <th>Account Administrator Can View Only</th> </tr> </thead> <tbody> <tr> <td>Phone / Fax / Email</td> <td>Site</td> </tr> <tr> <td>Physical Address</td> <td>Company Name</td> </tr> <tr> <td>Postal Address</td> <td>ABN / ACN Number</td> </tr> <tr> <td>DX Address</td> <td>Account Code</td> </tr> <tr> <td>Account Contacts – Primary and Billing</td> <td>Industry</td> </tr> <tr> <td>Specify Billing Address</td> <td>How did you hear about us</td> </tr> <tr> <td>Invoice Delivery Method</td> <td></td> </tr> <tr> <td>Default Order Jurisdiction</td> <td></td> </tr> <tr> <td>Default Delivery Methods</td> <td></td> </tr> <tr> <td>Add Users</td> <td></td> </tr> <tr> <td>Manager User Accounts</td> <td></td> </tr> </tbody> </table> | Account Administrator Can Update | Account Administrator Can View Only | Phone / Fax / Email | Site | Physical Address | Company Name | Postal Address | ABN / ACN Number | DX Address | Account Code | Account Contacts – Primary and Billing | Industry | Specify Billing Address | How did you hear about us | Invoice Delivery Method |  | Default Order Jurisdiction |  | Default Delivery Methods |  | Add Users |  | Manager User Accounts |  |
| Account Administrator Can Update  | Account Administrator Can View Only  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Phone / Fax / Email   | Site   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Physical Address  | Company Name   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Postal Address  | ABN / ACN Number   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| DX Address  | Account Code   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Account Contacts – Primary and Billing  | Industry   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Specify Billing Address   | How did you hear about us  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Invoice Delivery Method   |  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Default Order Jurisdiction  |  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Default Delivery Methods  |  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Add Users   |  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Manager User Accounts   |  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Change My Details  | <p>When the user hovers over  and selects <b>Change My Details</b>, the user will be able to update their own details.</p> <ul style="list-style-type: none"> <li>• User Details (Username, Full Name, Contact Details, Position);</li> <li>• Ordering Details;</li> <li>• Communication from SAI Global.</li> </ul>  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Switch Accounts   | <b>Switch Accounts</b> can only be seen if and internal operator has linked the user to additional accounts. Switch Accounts can be found on the banner of the home page beside the user's name by hovering over  .   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Contact   | <b>Contact</b> allows the user to contact SAI Global Property by email for chase up of certificates or further information in relation to products. These emails go to <a href="mailto:epropertysupport@saiglobal.com">epropertysupport@saiglobal.com</a> .  |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |
| Logout  | <b>Logout</b> enables the user to logout of Settlement Room.   |                                  |                                     |                     |      |                  |              |                |                  |            |              |  |          |                         |                           |                         |  |                            |  |                          |  |           |  |                       |  |

## 4. User Account Maintenance

### 4.1 User Account Maintenance - Change Password

| Glossary  |   |
|---|---|
| Password  | <p>Depends on the accounts security profile. The default profile that applies to almost everyone requires a <b>password</b> between 8 and 30 characters.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Standard</b><br/> <b>Session Timeout</b> 90 minutes<br/> <b>Minimum Password Length</b> 8 characters<br/> <b>Maximum Password Length</b> 30 characters<br/> <b>Password Expiry</b> 0 days<br/> <b>Password Expiry Notification</b> 5 days<br/> <b>Password Reuse History</b> 3 days<br/> <b>Password Attempts</b> 5<br/> <b>User Lock Out Duration</b> 5 minutes</p> </div> |
| Security Setting – Session Time out             | <b>Session Time out</b> is the number of minutes of inactivity before system will automatically log you out.  |
| Security Setting – Minimum Password Length      | <b>Minimum Password Length</b> is the minimum amount of characters required for a password.   |
| Security Setting – Maximum Password Length      | <b>Maximum Password Length</b> is the maximum amount of characters allowed for a password.  |
| Security Setting – Password Expiry              | <b>Password Expiry</b> is the number of days before your password must be changed. If password expiry is 0 the password never expires.  |
| Security Setting – Password Notification Expiry | <b>Password Expiry Notification</b> is the number of days before password expires that the system will notify you. If password expiry is 0 then this redundant.   |
| Security Setting – Password Reuse History       | <b>Password Reuse History</b> is the length of time that the system will remember passwords and disallows reuse.  |
| Security Setting – Password Attempts            | <b>Password Attempts</b> is the number of invalid password attempts before the user is automatically locked out.  |
| Security Setting – User Lock Out Duration       | <b>User Lock Out Duration</b> is the number of minutes that a user is unable to log into the systems following an automatic lockout. A user can contact the Account Administrator or SAI Global Operator to unlock their account sooner then the duration.  |



**Notes**

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Complete the steps below **Change my Password.**

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step | Action   |
|------|--|
| 1    | On the banner of the page, hover over <b>Your Name</b> next to Contact   Help   Logout to display user functions. <div data-bbox="1031 472 1374 584" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">             Welcome John Smith  Contact   Help   Logout<br/> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 2px;">Change Password</div><br/> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 2px;">Change My Details</div> </div> |
| 2    | Click on <b>Change Password.</b>   |
| 3    | Enter in your <b>Current Password.</b>   |
| 4    | Enter in a <b>New Password.</b>  |
| 5    | In the Confirm New Password Field, enter in the <b>New Password</b> again.   |
| 6    | Click on <b>Save</b> to save changes. <div data-bbox="991 701 1374 891" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <h3 style="text-align: center;">Change Your Password</h3> <p>Current Password <input type="password"/></p> <p>New Password <input type="password"/></p> <p>Confirm New Password <input type="password"/></p> <p style="text-align: center;"><a href="#" style="background-color: #0070c0; color: white; padding: 5px 15px; border: none;">Save</a></p> </div>                    |
| 7    | A confirmation message will appear.  |
| 8    | Click on <b>Ok</b> to confirm changes.   |

Password Requirements are 8 – 30 Characters.

Please note: If a user has forgotten their password, the user can type in their username and click on 'Forgotten your Password' on the login page. An email link will be emailed to the user. The user will need to follow the prompts to update their password.

Sign in

Username

Password

[Submit](#)

[Forgotten your password?](#)



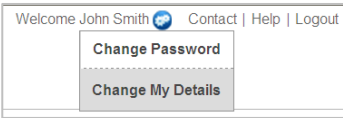

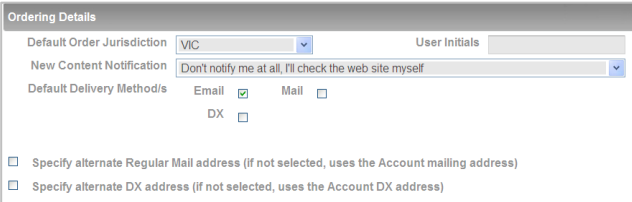
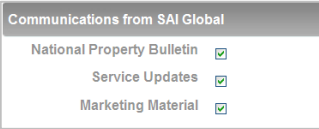

If multiple users use the same email address an error message will appear, the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.

## 4.2 User Account Maintenance – Update my Profile

| Glossary                   |   |
|----------------------------|---|
| Username                   | <b>Usernames</b> can be between 1 and 50 characters, and can basically contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).  |
| Password                   | Depends on the accounts security profile. The default profile that applies to almost everyone requires a <b>password</b> between 8 and 30 characters.<br><br><div style="border: 1px solid black; padding: 5px;"> <p><b>Standard</b><br/> <b>Session Timeout</b> 90 minutes<br/> <b>Minimum Password Length</b> 8 characters<br/> <b>Maximum Password Length</b> 30 characters<br/> <b>Password Expiry</b> 0 days<br/> <b>Password Expiry Notification</b> 5 days<br/> <b>Password Reuse History</b> 3 days<br/> <b>Password Attempts</b> 5<br/> <b>User Lock Out Duration</b> 5 minutes</p> </div> |
| Basic Details              | <b>Basic Details</b> is the users name and contact details.   |
| Default Jurisdiction       | <b>Default Jurisdiction</b> is the default page for ordering services in the preferred state. For e.g. - if you choose VIC, when Property Searches menu will automatically open the VIC Menu.   |
| New Content Notification   | There are 3 options for users to be <b>notified of completed certificates / orders</b> : <ul style="list-style-type: none"> <li>• Don't notify me at all, I'll check the website myself;</li> <li>• Notify me only when all content has arrived and the order is complete;</li> <li>• Notify me when any new certificate contact arrives for an order.</li> </ul>   |
| Default Delivery Methods   | <b>Delivery Method</b> of Certificates ordered in SAI Global Website.   |
| User Initials              | <b>User Initials</b> is the user's initials; this can be used for certain billing reports.  |
| Alternate Address          | If a user has a delivery default as mail and their <b>mailing address</b> is different to the company address they can enter these details in the user's profile.   |
| National Property Bulletin | <b>National Property Bulletin</b> is a free weekly bulletin that is sent to all users   |
| Service Updates            | <b>Service Updates</b> must be selected receive emails about system changes.  |
| Marketing Materials        | <b>Marketing Materials</b> must be selected to receive emails about New Products etc.   |

Complete the steps below **Update my Profile**.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.


| Step   | Action  |
|--|---|
| 1  | On the banner of the page, hover over your <b>Name</b> next to Contact   Help   Logout to display User Functions<br> |
| 2  | Click on <b>Change my Details</b> .   |
| 3  | Enter Data or Change the Data in the <b>User Details</b> fields.<br>  |
| 4  | Select or check any selections in the <b>Ordering Details</b> section.<br>   |
| 5  | Select or check any selections in the <b>Communications from SAI Global</b> section.<br>                           |
| 6  | Click on <b>Update</b> to save changes.   |
| 7  | A confirmation message will appear.   |
| 8  | Click on <b>Ok</b> to confirm changes.  |
|  Related Tasks can be found on the right hand side of the page which gives the user additional links to manage their profile. |   |

 **Administrators have the ability to update all users' details within their account.**



Complete the steps below to change a **Users Username**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step   | Action  |
|--|---|
| 1  | On the banner of the page, hover over your <b>Name</b> next to Contact   Help   Logout to display User Functions <div data-bbox="1027 472 1369 584" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">             Welcome John Smith  Contact   Help   Logout<br/>             Change Password<br/>             Change My Details           </div>   |
| 2  | Click on <b>Change my Details</b> .   |
| 3  | Click on <b>Change Username</b> under the related tasks. <div data-bbox="1193 712 1374 831" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">             Related Tasks<br/> <a href="#">Reset Password</a><br/> <a href="#">Change Username</a><br/> <a href="#">Manage Account</a> </div>  |
| 4  | Enter in the <b>New Username</b> .  |
| 5  | Confirm the <b>New Username</b> .   |
| 6  | Click on <b>Confirm</b> to save changes. <div data-bbox="916 846 1377 1025" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">             Change Username <span style="float: right;">x</span><br/>             New Username <input type="text"/><br/>             Confirm Username <input type="text"/><br/> <div style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Confirm"/> </div> </div> |
| 7  | A confirmation message will appear.   |
| 8  | Click on <b>Ok</b> to confirm changes.  |
|  Username are unique. |   |



**Names can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Names cannot include keys that are not on the keyboard (e.g. ä).**





Complete the steps below **Switch Accounts**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action   |
|---|--|
| 1   | On the banner of the page, hover over your <b>name</b> next to Contact   Help   Logout to display User Functions. <div data-bbox="1075 468 1378 602" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">             Welcome John Smith  Contact   Help   Logout<br/>             Change Password<br/>             Change My Details<br/>             Switch Account           </div> |
| 2   | Click on <b>Switch Account</b> .   |
| 3   | Select the <b>Account</b> you would like to switch to.   |
| 4   | Click on <b>Switch</b> to switch accounts. <div data-bbox="887 707 1366 842" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <b>Switch Account</b><br/>             Please select the account you want to switch to<br/> <input type="text" value="SAI Global Property Division [espreon]"/><br/> <input type="button" value="Switch"/> </div>                                    |
| 5   | The user has now switched accounts.  |
| The user will know what account they are in as the account code will appear next to the users name on the banner of the homepage. |  |

**It is the users responsibility to know which account they are in.**

## 5. Account Administrator Maintenance

| Glossary                               |   |
|--|---|
| Company Name                           | <b>Company Name</b> is the legal name of a firm.  |
| ABN / ACN Number                       | <b>ABN</b> = Australian Business Number – relates to GST.<br><b>ACN</b> = Australian Company Number – the companies identification number.  |
| Account Code                           | <b>Account Code</b> is also known as the Client ID. It is a short string of characters that operators can use to search for a client.   |
| Industry                               | <b>Industry</b> is the area of business your work is in.  |
| How did you hear about us?             | <b>How did you hear about us?</b> provides information about how our client heard about us i.e. Web, Word of Mouth , Conferences etc.   |
| Phone / Fax / Email                    | <b>Phone / Fax / Email</b> are the general contact details for the company.   |
| Physical Address                       | Example of a <b>Physical Address</b> is 224-226 Normanby Road Southbank VIC 3006.   |
| Postal Address                         | Example of a <b>Postal Address</b> PO Box, GPO Box, Locked Bag.   |
| DX Address                             | Example of a <b>DX Address</b> DX 332 Melbourne.  |
| Account Contacts - Primary and Billing | Examples of <b>Primary Contacts</b> - Directors, Managers, Team Leaders.<br>Examples of <b>Billing Contacts</b> – Accounts / Finance Contact.   |
| Specify Billing Address                | <b>Specify Billing Address</b> allows a client to provide an alternate address for receipt of statements.   |
| Invoice Delivery Method                | <b>Email, Mail, DX.</b>   |
| Default Order Jurisdiction             | <b>Default Jurisdiction</b> is the default page for ordering services in the preferred state. For e.g. - if you choose VIC, when Property Searches menu will automatically open the VIC Menu. |
| Default Delivery Methods               | <b>Default Delivery Methods</b> is the default delivery Method of Certificates ordered via SAI Global.  |
| Add Users                              | <b>Add Users</b> allows an Internal Operator or Account Administrator to create additional users within their account.  |
| Manager User Accounts                  | <b>Manager User Accounts</b> is where the user details such as status, passwords and usernames are maintained.  |



### Notes

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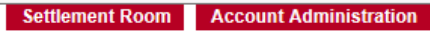

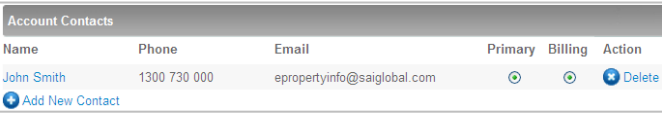
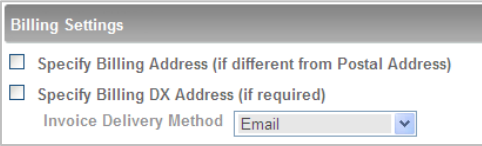
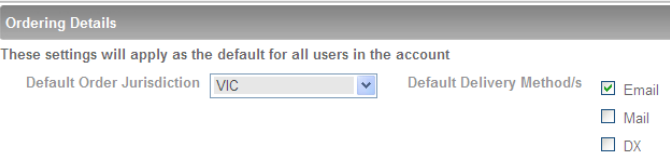

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Complete the steps below to **Update Company Account Details**.

The process time should only take 3 minutes. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action   |
|---|--|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br> |
| 2   | Update details in the <b>Company Information</b> section.<br>                          |
| 3   | Update details in the <b>Address Details</b> section.  |
| 4   | Update details in the <b>Account Contact</b> section.<br>                             |
| 5   | Update details in the <b>Billing Settings</b> section.<br>                           |
| 6   | Update details in the <b>Ordering Details</b> section.<br>                           |
| 7   | Click on <b>Update</b> to save changes.  |
| 8   | A confirmation message will appear.  |
| 9   | Click on <b>Ok</b> to confirm changes.   |
|  A standard user will not see the Account Administration link. |  |



**If an Administrator needs to update any details that are view only, they are required to email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com)**

**Account Management**

Company Information

Site SAIG [SAIG]

Company Name SAI Global Training

ABN/ACN 00 000 000 000

Account Code PCL11880

To change your Company Particulars (Name/Business Number) please email us.



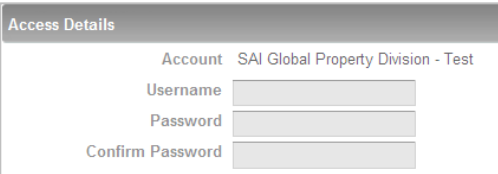

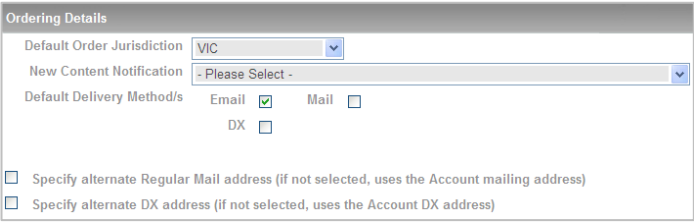
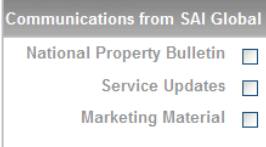

## 5.1 Add User

Add User allows the Account Administrator & internal operators to create additional users under an account. It is recommended that all users have their own unique log in details for SAI Global Property.

| Glossary                   |   |
|----------------------------|---|
| Username                   | <b>Usernames</b> can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).   |
| Password                   | Depends on the accounts security profile. The default profile that applies to almost everyone requires a <b>password</b> between 8 and 30 characters.<br><br><div style="border: 1px solid black; padding: 5px;"> <p><b>Standard</b><br/> <b>Session Timeout</b> 90 minutes<br/> <b>Minimum Password Length</b> 8 characters<br/> <b>Maximum Password Length</b> 30 characters<br/> <b>Password Expiry</b> 0 days<br/> <b>Password Expiry Notification</b> 5 days<br/> <b>Password Reuse History</b> 3 days<br/> <b>Password Attempts</b> 5<br/> <b>User Lock Out Duration</b> 5 minutes</p> </div> |
| Basic Details              | <b>Basic Details</b> refers to the users name and contact details.  |
| Default Jurisdiction       | <b>Default Jurisdiction</b> is the default page for ordering services in the preferred state. For e.g. - if you choose VIC, when Property Searches menu will automatically open the VIC Menu.   |
| New Content Notification   | There are 3 options for users to be <b>notified</b> of completed certificates / orders via SAI Global website: <ul style="list-style-type: none"> <li>• Don't notify me at all, I'll check the website myself;</li> <li>• Notify me only when all content has arrived and the order is complete;</li> <li>• Notify me when any new certificate contact arrives for an order.</li> </ul>   |
| Default Delivery Methods   | <b>Default Delivery Methods</b> is the delivery method of certificates ordered  |
| User Initials              | <b>User Initials</b> are the user's initials; These are used on certain billing reports.  |
| Alternate Address          | If a user has 'mail as a default delivery and their <b>mailing address</b> is different to the company address, the user can enter the mailing address details in the users profile.  |
| National Property Bulletin | The <b>National Property Bulletin</b> is a free weekly bulletin that is sent to all users   |
| Service Updates            | <b>Service Updates</b> must be selected to receive emails about system changes.   |
| Marketing Materials        | <b>Marketing Materials</b> must be selected to receive emails about new products etc.   |

Complete the steps below to 'Add a User'.

The process time should only take 2 minutes. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action   |
|---|--|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>  |
| 2   | Click on <b>Add User</b> under related tasks.<br>   |
| 3   | Enter in the <b>Access Details</b> (All fields are mandatory).<br>   |
| 4   | Enter in the <b>Basic Details</b> (All fields are mandatory except alt phone and fax).<br>  |
| 5   | Enter in the <b>Ordering Details</b> (All fields are mandatory except default jurisdiction, user initials, alternate addresses).<br> |
| 6   | Select from the <b>Communication from SAI Global</b> options (non mandatory).<br>   |
| 7   | Click on <b>Save</b> to create a new user.   |
| 8   | The Account Administrator is returned back to the <b>Manage Account Screen</b> .   |
|  <p>SAI Global Property recommend that all users have their own unique login details because:</p> <ul style="list-style-type: none"> <li>• It highlights who placed the order;</li> <li>• If there is a problem with the order we know who to contact;</li> <li>• Certificates are delivered directly to the user by email.</li> </ul> |  |



Once an Account Administrator has added a new user to their account, the user will be able to place orders immediately.

## 5.2 Manage Users

Manage Users displays a list of all users in an account.

| Glossary            |  |
|---------------------|--|
| Username            | <b>Usernames</b> can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).  |
| Surname             | <b>Surname</b> is the user's surname.  |
| Given Name          | <b>Given Name</b> is the user's first name.  |
| Status – Active     | <b>Status – Active</b> enables the user to log into SAI Global Property.   |
| Status – Locked Out | For certain accounts (based on their security profile), users will be automatically ' <b>Locked Out</b> ' if they provide an incorrect password a certain number of times. Users can be unlocked by an SAIG Operator or the Accounts Administrator/s of that account. The default (at this stage) will be to not lock users out. |
| Status – Suspended  | <b>Status – Suspended</b> allows SAIG Operator or Account Administrator to temporarily deactivate a user's account, to prevent them from logging in. Users can still be edited and re-activated by an SAIG Operators or Accounts Administrators.   |
| Status - Deleted    | <b>Status - Deleted</b> is a permanent and irreversible closure of a users account. The user's details will be viewable, not editable, and the status change cannot be reversed.   |
| Admin               | If the <b>Admin</b> box is ticked then that person is an Account Administrator.  |
| Reset Password      | <b>Reset Password</b> allows the administrator to reset a user's password.   |



### Notes

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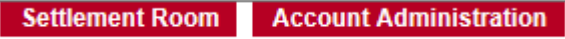

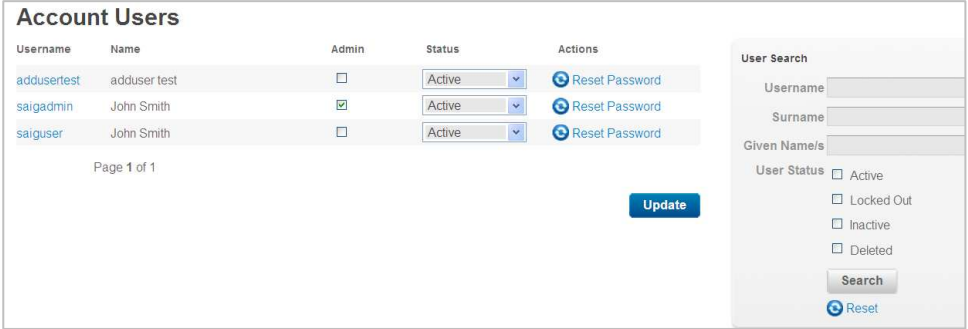

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Complete the steps below to view a list of **Account Users**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step | Action   |
|------|--|
| 1    | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br><br>  |
| 2    | The Manage Account Screen will open.   |
| 3    | Click on <b>Manage Users</b> under related tasks.<br><br>   |
| 4    | The following screen will appear to <b>Manager User Accounts</b> .<br><br>  |
|      |  To view user details click on the user's username ( <i>written in blue</i> ).<br><br>Option available on this page to add or remove an account administrator, change a user's status or reset a user's password. |



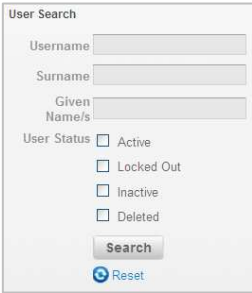


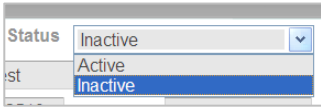

 **A list of all users (Active, Locked Out, Inactive and Deleted) will be shown. Use the User Search Tool to filter the user list.**






Complete the steps below to change a **Users Status**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step | Action   |
|------|--|
| 1    | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>   |
| 2    | Click on <b>Manage Users</b> under related tasks.<br>   |
| 3    | Search for the <b>User</b> using the <b>User Search Tool</b> , by entering in at least one field.<br><ul style="list-style-type: none"> <li>• Username;</li> <li>• Surname;</li> <li>• Given Name(s);</li> <li>• User Status.</li> </ul>  |
| 4    | Change the user's status to <b>Active or Inactive</b> .  |
| 5    | Click on <b>Update</b> .   |
| 6    | A confirmation message will appear.  |
| 7    | Click on <b>Ok</b> to confirm changes.<br>  |
| 8    | <b>Or;</b>   |
| 9    | Click on the users <b>Username</b> ( <i>written in blue</i> );<br>  |
| 10   | Go to the <b>Status</b> drop down  |
| 11   | Select a <b>Status</b> ;<br>  |
| 12   | Click on <b>Update</b> to save changes   |
|      |  Access to rest password & change username can be found under related tasks in the user's profile.  |

 **A user's status can only be made deleted by an SAIG Property Operator.**

## 5.4 Reset Password

**Reset Password** allows the Administrator to reset a user's password.

| Glossary  |   |
|---|---|
| Password  | <p>Depends on the accounts security profile. The default profile that applies to almost everyone requires a <b>password</b> between 8 and 30 characters.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Standard</b><br/> <b>Session Timeout</b> 90 minutes<br/> <b>Minimum Password Length</b> 8 characters<br/> <b>Maximum Password Length</b> 30 characters<br/> <b>Password Expiry</b> 0 days<br/> <b>Password Expiry Notification</b> 5 days<br/> <b>Password Reuse History</b> 3 days<br/> <b>Password Attempts</b> 5<br/> <b>User Lock Out Duration</b> 5 minutes</p> </div> |
| Security Setting – Session Time out             | <b>Session Time out</b> is the number of minutes of inactivity before system will automatically log you out.  |
| Security Setting – Minimum Password Length      | <b>Minimum Password Length</b> is the minimum amount of characters required for a password.   |
| Security Setting – Maximum Password Length      | <b>Maximum Password Length</b> is the maximum amount of characters allowed for a password.  |
| Security Setting – Password Expiry              | <b>Password Expiry</b> is the number of days before your password must be changed. If password expiry is 0 the password never expires.  |
| Security Setting – Password Notification Expiry | <b>Password Expiry Notification</b> is the number of days before password expires that the system will notify you. If password expiry is 0 then this redundant.   |
| Security Setting – Password Reuse History       | <b>Password Reuse History</b> is the length of time that the system will remember passwords and disallows reuse.  |
| Security Setting – Password Attempts            | <b>Password Attempts</b> is the number of invalid password attempts before the user is automatically locked out.  |
| Security Setting – User Lock Out Duration       | <b>User Lock Out Duration</b> is the number of minutes that a user is unable to log into the systems following an automatic lockout. A user can contact the account administrator or SAI Global Operator to unlock their account sooner then the duration.  |



### Notes



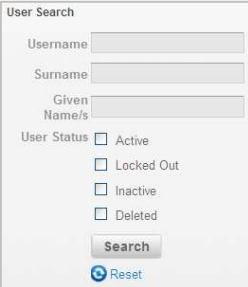



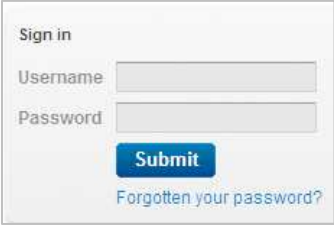
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Complete the steps below to change a **Users Password**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action  |
|---|---|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>   |
| 2   | Click on <b>Manage Users</b> under related tasks.<br>  |
| 3   | Search for the <b>User</b> using the <b>User Search Tool</b> , by entering in at least one field. <ul style="list-style-type: none"> <li>• Username;</li> <li>• Surname;</li> <li>• Given Name(s);</li> <li>• User Status.</li> </ul>  |
| 4   | Click on a <b>Username</b> ( <i>written in blue</i> ).<br>  |
| 5   | Click on <b>Reset Password</b> under related tasks.<br>  |
| 6   | Enter in the <b>New Password</b> .  |
| 7   | In Confirm Password enter in the <b>New Password</b> again.   |
| 8   | Click on <b>Confirm</b> to save changes.  |
| 9   | A confirmation message will appear.   |
| 10  | Click on <b>Ok</b> to confirm changes.  |
|  Password Requirements are 8 – 30 Characters.<br>Please note: If a user has forgotten their password, the user can type in their username and click on 'Forgotten your Password' on the login page. An email link will be emailed to the user. The user will need to follow the prompts to update their password.<br> |   |



**If more than one user has the same email address an error message will appear and the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.**


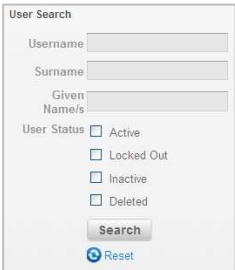


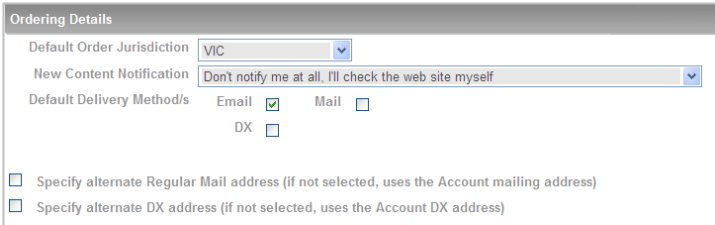
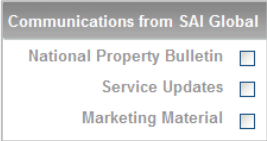

## 5.5 Update Profile

Update Profile allows the Administrator to update a users profile such as User Details, Ordering Details, and Communication from SAI Global and Other Settings sections.

| Glossary                   |  |
|----------------------------|--|
| Username                   | <b>Usernames</b> can be between 1 and 50 characters, and can basically contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).   |
| Password                   | Depends on the accounts security profile. The default profile that applies to almost everyone requires a <b>password</b> between 8 and 30 characters. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Standard</b><br/> <b>Session Timeout</b> 90 minutes<br/> <b>Minimum Password Length</b> 8 characters<br/> <b>Maximum Password Length</b> 30 characters<br/> <b>Password Expiry</b> 0 days<br/> <b>Password Expiry Notification</b> 5 days<br/> <b>Password Reuse History</b> 3 days<br/> <b>Password Attempts</b> 5<br/> <b>User Lock Out Duration</b> 5 minutes</p> </div> |
| Basic Details              | <b>Basic Details</b> is the users name and contact details.  |
| Default Jurisdiction       | <b>Default Jurisdiction</b> is the default page for ordering services in the preferred state. For e.g. - if you choose VIC, when Property Searches menu will automatically open the VIC Menu.  |
| New Content Notification   | There are 3 options for users to be <b>notified of completed</b> certificates / orders: <ul style="list-style-type: none"> <li>• Don't notify me at all, I'll check the website myself;</li> <li>• Notify me only when all content has arrived and the order is complete;</li> <li>• Notify me when any new certificate contact arrives for an order.</li> </ul>   |
| Default Delivery Methods   | <b>Delivery Method</b> of Certificates ordered via SAI Global website  |
| User Initials              | <b>User Initials</b> is the user's initials; this can be used for certain billing reports.   |
| Alternate Address          | If a user has a delivery default as mail and their <b>mailing address</b> is different to the company address they can enter these details in the user's profile.  |
| National Property Bulletin | <b>National Property Bulletin</b> is a free weekly bulletin that is sent to all users  |
| Service Updates            | <b>Service Updates</b> must be selected receive emails about system changes.   |
| Marketing Materials        | <b>Marketing Materials</b> must be selected to receive emails about New Products etc.  |

Complete the steps below to update **User Profile** details.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.






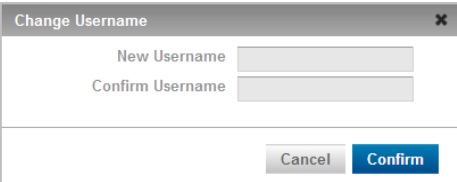

| Step  | Action  |
|---|---|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>   |
| 2   | Click on <b>Manage Users</b> under related tasks.   |
| 3   | Search for the <b>User</b> using the <b>User Search Tool</b> , by entering in at least one field.<br><ul style="list-style-type: none"><li>• Username;</li><li>• Surname;</li><li>• Given Name(s);</li><li>• User Status.</li></ul>  |
| 4   | Click on the required <b>Username</b> ( <i>written in blue</i> ).<br>   |
| 5   | Update any details in the <b>User Details</b> section.<br>  |
| 6   | Update any details in the <b>Ordering Details</b> section.<br>  |
| 7   | Update any details in the <b>Communications from SAI Global</b> section.<br>   |
| 8   | Click on <b>Update</b> to save changes.   |
| 9   | A confirmation message will appear.   |
| 10  | Click on <b>Ok</b> to confirm changes.  |
|  To from changes are automatically saved under the notes sections. |   |






Complete the steps below to change a **Users Username**.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproptysupport@saiglobal.com](mailto:eproptysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step | Action   |
|------|--|
| 1    | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>   |
| 2    | Click on <b>Manage Users</b> under related tasks.<br>   |
| 3    | Search for the <b>User</b> using the <b>User Search Tool</b> , by entering in at least one field.<br><ul style="list-style-type: none"> <li>• Username;</li> <li>• Surname;</li> <li>• Given Name(s);</li> <li>• User Status.</li> </ul>  |
| 4    | Click on the required <b>Username</b> ( <i>written in blue</i> ).<br>  |
| 5    | Click on <b>Change Username</b> under the related tasks.<br>  |
| 6    | Enter in the <b>New Username</b> .   |
| 7    | Confirm the <b>New Username</b> .  |
| 8    | Click on <b>Confirm</b> to save changes.<br>   |
| 9    | A confirmation message will appear.  |
| 10   | Click on <b>Ok</b> to confirm changes.   |
|      |  Usernames are unique.  |



**Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).**

## 5.7 Manage Groups

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

### 5.7.1 Add Group Name

| Glossary    |  |            |   |      |  |
|-------------|--|------------|---|------|--|
| Teams       | <p><b>Team</b> is the same as Default (groups) but a Team Leader can be assigned to a team.</p> <p>A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.</p> <ul style="list-style-type: none"> <li>• Group Type named Team;</li> <li>• Group named Sales;</li> <li>• Team Leader Selected as John Smith;</li> <li>• Users under John are Terry and Harry etc.</li> </ul> <p>John will then have access to manage the users, but he cannot add or remove users from the team unless he is an Account Administrator.</p> |            |   |      |  |
| Departments | <p><b>Department</b> is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.</p>  |            |   |      |  |
| Name        | <p><b>Name</b> is the group name.</p>  |            |   |      |  |
| Type        | <p>There are two options for <b>Type</b>:</p> <table border="1"> <tbody> <tr> <td>Department</td> <td>Department comes from a requirement for specific accounts to see a department code on their invoices.</td> </tr> <tr> <td>Team</td> <td>Team allows a team leader to be assigned to a group.</td> </tr> </tbody> </table>  | Department | Department comes from a requirement for specific accounts to see a department code on their invoices. | Team | Team allows a team leader to be assigned to a group. |
| Department  | Department comes from a requirement for specific accounts to see a department code on their invoices.  |            |   |      |  |
| Team        | Team allows a team leader to be assigned to a group.   |            |   |      |  |



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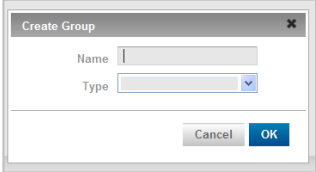
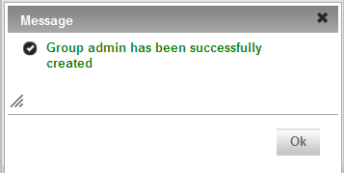

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Complete the steps below to 'Add a Group Name'.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action  |
|---|---|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>  |
| 2   | Click on <b>Manage Groups</b> under related tasks.<br>   |
| 3   | Click on <b>Add Group</b> under related tasks.<br>   |
| 4   | The Following Box will appear to <b>Add a Group</b> .   |
| 5   | Type in a <b>Group Name</b> .   |
| 6   | Select one of the following options under type: <ul style="list-style-type: none"> <li>• <b>Department</b> (<i>Departments Box Selected in Manage Accounts</i>);</li> <li>• <b>Team</b> (<i>Teams Box Selected in Manage Accounts</i>).</li> </ul>  |
| 7   | Click on <b>Ok</b> to add a New Group Name.   |
| 8   | A confirmation message will appear.   |
| 9   | Click on <b>Ok</b> to confirm New Group Name.<br>  |
|  Access to Group Functions is only enabled for account administrators to see if the group settings box is selected by an internal operator in the Account Management Screen. |   |



**A Group Type is required prior to adding Group Names. Access for Administrators requires special permissions.**

### 5.7.2 Edit Group Name

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

| Glossary    |  |            |   |      |  |
|-------------|--|------------|---|------|--|
| Teams       | <p><b>Team</b> is the same as Default (groups) but a Team Leader can be assigned to a team.</p> <p>A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.</p> <ul style="list-style-type: none"> <li>• Group Type named Team;</li> <li>• Group named Sales;</li> <li>• Team Leader Selected as John Smith;</li> <li>• Users under John are Terry and Harry etc.</li> </ul> <p>John will then have access to manage the users, but he cannot add or remove users from the team unless he is an Account Administrator.</p> |            |   |      |  |
| Departments | <p><b>Department</b> is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.</p>  |            |   |      |  |
| Name        | <p><b>Name</b> is the group name.</p>  |            |   |      |  |
| Type        | <p>There are two options for <b>Type</b>:</p> <table border="1"> <tbody> <tr> <td>Department</td> <td>Department comes from a requirement for specific accounts to see a department code on their invoices.</td> </tr> <tr> <td>Team</td> <td>Team allows a team leader to be assigned to a group.</td> </tr> </tbody> </table>  | Department | Department comes from a requirement for specific accounts to see a department code on their invoices. | Team | Team allows a team leader to be assigned to a group. |
| Department  | Department comes from a requirement for specific accounts to see a department code on their invoices.  |            |   |      |  |
| Team        | Team allows a team leader to be assigned to a group.   |            |   |      |  |



**Notes**

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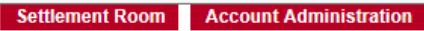


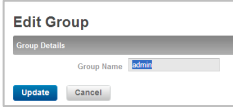


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Complete the steps below to **Edit Group Name**.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action   |
|---|--|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br> |
| 2   | Click on <b>Manage Groups</b> under related tasks.<br>                                |
| 3   | Click on <b>Edit</b> to change a Group Name.<br>                                       |
| 4   | Type in a <b>New Group Name</b> .<br>   |
| 5   | Click on <b>Update</b> to edit the Group Name.   |
| 6   | If the <b>Group Type</b> is <b>Team</b> , the user can update the Team Leader.<br>  |
| 7   | A confirmation message will appear.  |
| 8   | Click on <b>Ok</b> to confirm changes.   |
|  Access to Group Functions is only enabled for account administrators to see if the group settings box is selected by an internal operator in the Account Management Screen. |  |

 **If the group type is Team the user can select the team leader in this section, however the team leader cannot be a member of the group.**

### 5.7.3 Edit Members within a Group (Add Members)

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

| Glossary    |  |            |   |      |  |
|-------------|--|------------|---|------|--|
| Teams       | <p><b>Team</b> is the same as Default (groups) but a Team Leader can be assigned to a team.</p> <p>A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.</p> <ul style="list-style-type: none"> <li>• Group Type named Team;</li> <li>• Group named Sales;</li> <li>• Team Leader Selected as John Smith;</li> <li>• Users under John are Terry and Harry etc.</li> </ul> <p>John will then have access to manage the users, but he cannot add or remove users from the team unless he is an Account Administrator.</p> |            |   |      |  |
| Departments | <p><b>Department</b> is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.</p>  |            |   |      |  |
| Name        | <p><b>Name</b> is the group name.</p>  |            |   |      |  |
| Type        | <p>There are two options for <b>Type</b>:</p> <table border="1"> <tbody> <tr> <td>Department</td> <td>Department comes from a requirement for specific accounts to see a department code on their invoices.</td> </tr> <tr> <td>Team</td> <td>Team allows a team leader to be assigned to a group.</td> </tr> </tbody> </table>  | Department | Department comes from a requirement for specific accounts to see a department code on their invoices. | Team | Team allows a team leader to be assigned to a group. |
| Department  | Department comes from a requirement for specific accounts to see a department code on their invoices.  |            |   |      |  |
| Team        | Team allows a team leader to be assigned to a group.   |            |   |      |  |



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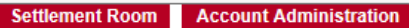
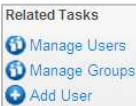



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Complete the steps below to **Add Members** to a group.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [epropertysupport@saiglobal.com](mailto:epropertysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action  |
|---|---|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>                          |
| 2   | Click on <b>Manage Groups</b> under related tasks.<br>   |
| 3   | Click on <b>Members</b> for the group name being updated.<br>   |
| 4   | A list of all active users will be in the Non Members Box, unless they are already a member of this group.<br> |
| 5   | Click on <b>User(s)</b> in <b>Non Members Box</b> .   |
| 6   | Click on <b>Add</b> to add members to the group.  |
| 7   | Once finished adding users click on <b>Update</b> to save changes.  |
| 8   | A confirmation message will appear.   |
| 9   | Click on <b>OK</b> to confirm changes.  |
| 10  | To move to another page use the options under the <b>Related Tasks Menu</b> .   |
|  The Non Members list will only show a list of users who are not a member in any groups within that group type.<br>Select more then one user at time by holding down the ctrl button while selecting the user names. |   |



**Users can belong to multiple groups; however a user can only belong to one group within a group type A Group Type is required prior to adding Group Names.**

### 5.7.4 Edit Members within a Group (Remove Members)

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

| Glossary    |  |            |   |      |  |
|-------------|--|------------|---|------|--|
| Teams       | <p><b>Team</b> is the same as Default (groups) but a Team Leader can be assigned to a team.</p> <p>A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.</p> <ul style="list-style-type: none"> <li>• Group Type named Team;</li> <li>• Group named Sales;</li> <li>• Team Leader Selected as John Smith;</li> <li>• Users under John are Terry and Harry etc.</li> </ul> <p>John will then have access to manage the users, but he cannot add or remove users from the team unless he is an Account Administrator.</p> |            |   |      |  |
| Departments | <p><b>Department</b> is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.</p>  |            |   |      |  |
| Name        | <p><b>Name</b> is the group name.</p>  |            |   |      |  |
| Type        | <p>There are two options for <b>Type</b>:</p> <table border="1"> <tbody> <tr> <td>Department</td> <td>Department comes from a requirement for specific accounts to see a department code on their invoices.</td> </tr> <tr> <td>Team</td> <td>Team allows a team leader to be assigned to a group.</td> </tr> </tbody> </table>  | Department | Department comes from a requirement for specific accounts to see a department code on their invoices. | Team | Team allows a team leader to be assigned to a group. |
| Department  | Department comes from a requirement for specific accounts to see a department code on their invoices.  |            |   |      |  |
| Team        | Team allows a team leader to be assigned to a group.   |            |   |      |  |



**Notes**

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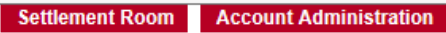




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Complete the steps below to **Remove Members**.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email [eproperysupport@saiglobal.com](mailto:eproperysupport@saiglobal.com) Monday to Friday 8:00am to 7:00pm EST.

| Step  | Action  |
|---|---|
| 1   | On the banner of the welcome page, click on the <b>Account Administration</b> link.<br>                          |
| 2   | Click on <b>Manage Groups</b> under related tasks.<br>   |
| 3   | Click on <b>Members</b> for the group name being updated.<br>   |
| 4   | A list of all active users will be in the Non Members Box, unless they are already a member of this group.<br> |
| 5   | Click on <b>User(s)</b> in the <b>Current Members Box</b> .   |
| 6   | Click on <b>Remove</b> to remove members.   |
| 7   | Once you have finished removing user(s) click on <b>Update</b> to save changes.   |
| 8   | A confirmation message will appear.   |
| 9   | Click on <b>Ok</b> to confirm changes.  |
| 10  | To move to another page use the options under the <b>Related Tasks Menu</b> .   |
|  The Non Members list will only show a list of users who are not a member in any groups within that group type.<br>Select more than one user at time by holding down the ctrl button while selecting the user names. |   |



**Users can belong to multiple groups; however a user can only belong to one group within a group type.**

### 5.7.5 Remove Group

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

| Glossary    |  |            |   |      |  |
|-------------|--|------------|---|------|--|
| Teams       | <p><b>Team</b> is the same as Default (groups) but a Team Leader can be assigned to a team.</p> <p>A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.</p> <ul style="list-style-type: none"> <li>• Group Type named Team;</li> <li>• Group named Sales;</li> <li>• Team Leader Selected as John Smith;</li> <li>• Users under John are Terry and Harry etc.</li> </ul> <p>John will then have access to manage the users, but he cannot add or remove users from the team unless he is an Account Administrator.</p> |            |   |      |  |
| Departments | <p><b>Department</b> is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.</p>  |            |   |      |  |
| Name        | <p><b>Name</b> is the group name.</p>  |            |   |      |  |
| Type        | <p>There are two options for <b>Type</b>:</p> <table border="1"> <tbody> <tr> <td>Department</td> <td>Department comes from a requirement for specific accounts to see a department code on their invoices.</td> </tr> <tr> <td>Team</td> <td>Team allows a team leader to be assigned to a group.</td> </tr> </tbody> </table>  | Department | Department comes from a requirement for specific accounts to see a department code on their invoices. | Team | Team allows a team leader to be assigned to a group. |
| Department  | Department comes from a requirement for specific accounts to see a department code on their invoices.  |            |   |      |  |
| Team        | Team allows a team leader to be assigned to a group.   |            |   |      |  |



**Notes**

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Complete the steps below to 'Remove a Group'.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

| Step | Action   |
|------|--|
| 1    | On the banner of the welcome page, click on the <b>Account Administration</b> link.   |
| 2    | Click on <b>Manage Groups</b> under related tasks.    |
| 3    | Click on <b>Members</b> for the group name you are updating.   |
| 4    | Remove <b>All Current Members</b> by clicking on the user(s) you wish to remove.   |
| 5    | Click on <b>Update</b> to save changes.  |
| 6    | A confirmation message will appear.  |
| 7    | Click on <b>Ok</b> to confirm changes.   |
| 8    | Click on <b>Manage Groups</b> under related tasks.   |
| 9    | Click on <b>Delete</b> beside the group you wish to delete.    |
| 10   | A confirmation message will appear.  |
| 11   | Click on <b>Ok</b> to confirm changes.   |
|      |  <p>The Non Members list will only show a list of users who are not a member in any groups within that group type.</p> <p>Select more than one user at time by holding down the ctrl button while selecting the user names.</p> |



**All users must be removed from a group before a group can be deleted.**

