AANC Forms Online User Manual

Updated: February 2016

Table of Contents

Getting Started

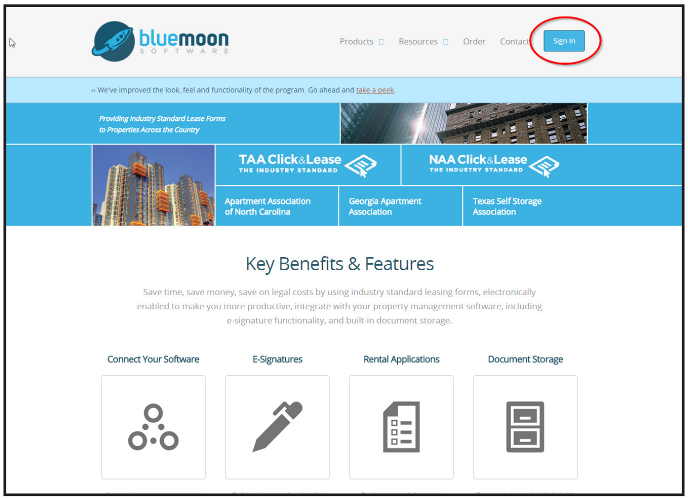
Logging Into Your Forms Online Account

All transactions made using the Forms Online program are protected by SSL encryption. In order to access your Forms Online account, you must first log in using your License (Serial) Number, User ID, and password.

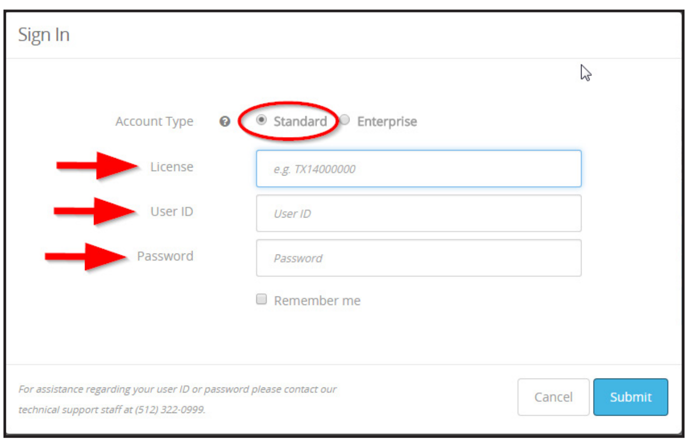
Follow these steps to log into the Forms Online program online:

1. Open your web browser and go to www.bluemoonforms.com.

2. On the homepage, click the ***Sign In*** button.



3. Enter your License (Serial) Number, User ID, and password. For *Account Type*, verify that ***Standard*** is selected.



4. Once you have entered your login information, click the ***Submit*** button.

NOTE:
If the login information entered is not valid, the program will display this message: ***The combination of License #, User ID, and password entered does not match our records***.

5. If you are logging in for the first time, you will be required to accept the software license agreement before you can use the Forms Online program. If you do not accept the license agreement, you will not be allowed to continue. You may also be prompted to complete the Setup Wizard.

The Setup Wizard

The first time you log in, the Setup Wizard will guide you through the process of configuring some settings for your Forms Online program.

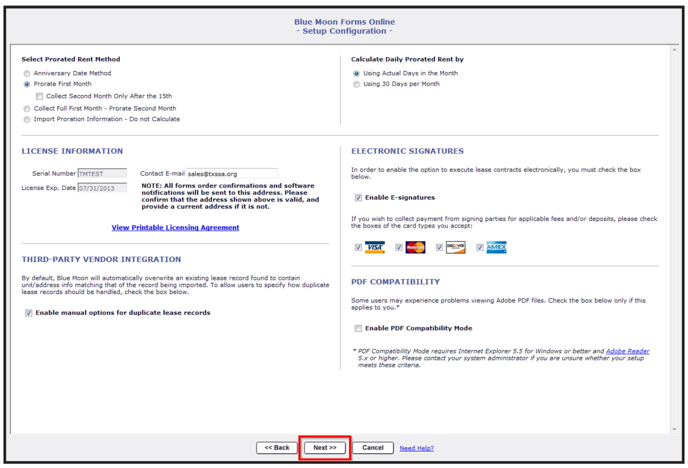
The Setup Wizard can be navigated using the buttons located at the bottom of the screen. Upon entering the wizard, simply click the ***Next*** button to begin entering configuration settings. If you do not wish to enter any settings at this time, click the ***Cancel*** button to exit the Setup Wizard.

All of the settings contained in the Setup Wizard can be accessed at a later time using the Settings tab in the Forms Online program.

Follow these steps to complete the Setup Wizard:

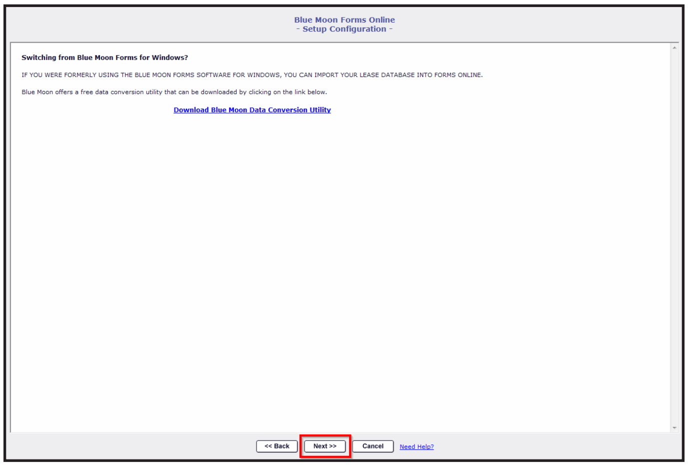
1. Read through the information on the first screen of the wizard, then click ***Next***.

2. On the *Setup Configuration* screen make your selections for each setting and click ***Next***.

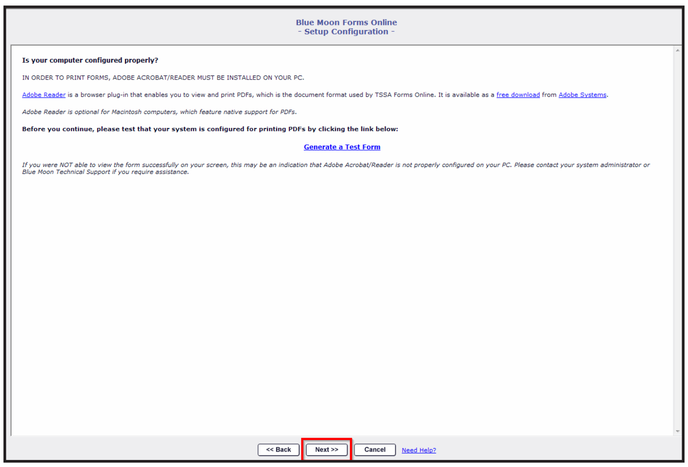


3. If you are a former Blue Moon Forms for Windows customer, and you have data that needs to be imported to the Forms Online program, click on the ***Download Blue Moon Data Conversion Utility*** link to run the conversion tool. Then click ***Next***.

NOTE:
If you are not a former Windows customer, you may skip Step 3 and click ***Next***.



4. In order to generate lease documents using the Forms Online program, you must have Adobe Reader installed. To ensure your system is configured to print PDF files, click on the ***Generate a Test Form*** link. Then click ***Next***.



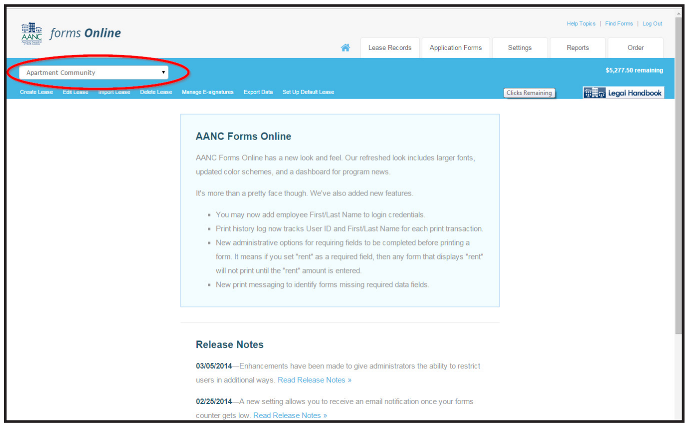
5. You are now finished with the Setup Wizard. It is recommended you set up your default lease at this time. Click on the ***Set Up Default Lease Now*** link, or click ***Finish*** to set up your default lease at a later time.

Setting Up the Default Lease

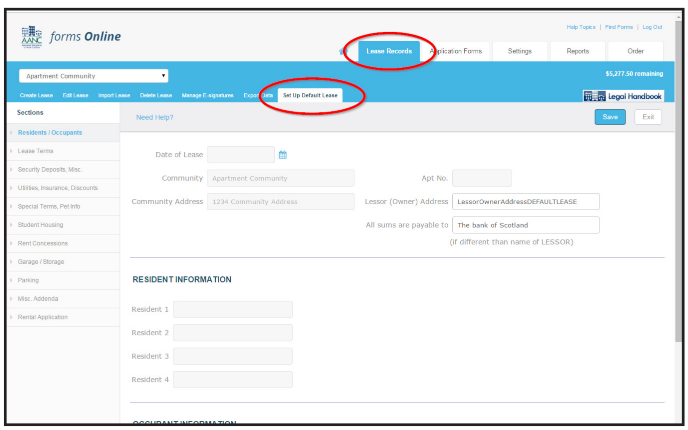
Before beginning to create lease records, most users will want to set up a default lease which can be used as a model to complete actual lease contracts. Setting up your default lease allows you to automatically fill in much of the lease including late fees, reletting charges, etc.

Follow these steps to set up your default lease:

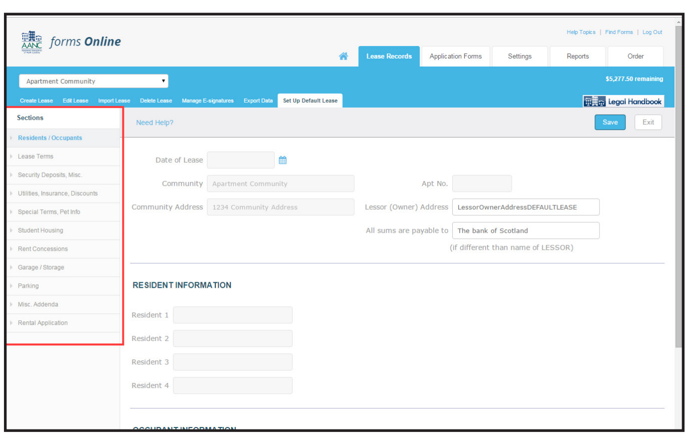
1. Once logged in, make sure your property is selected in the ***Select Property*** menu. If you have more than one property linked to your Forms Online license, you will need to create a default lease for each property in the menu.



2. Click the ***Lease Records*** tab. Then click ***Set Up Default Lease***.

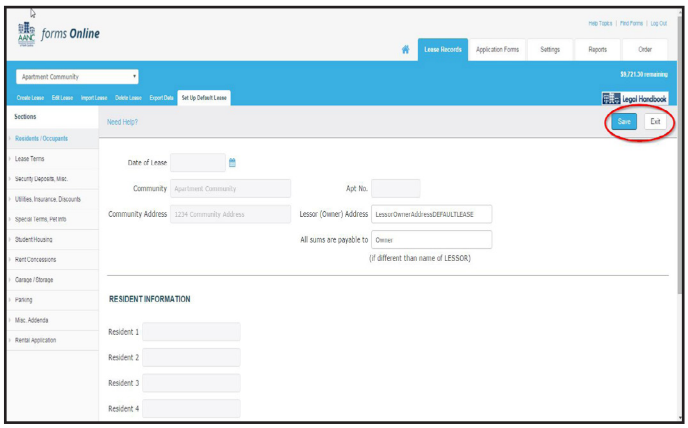


3. The sections listed on the left side of the screen correspond to the various sections of the lease contract including *Lease Terms*, *Special Provisions*, *Lease Guaranty*, etc.



NOTE:
Some fields are disabled because the information contained in these fields will typically be different for each lease. For example, you cannot enter any resident information on the default lease since this information will vary for each resident.

4. Click on each section of the lease and fill in each field with the appropriate information according to your property/company's normal operating procedures. As you complete each section, click ***Save*** in the upper right corner of the screen. If you click ***Exit***, you will be prompted to save before exiting.

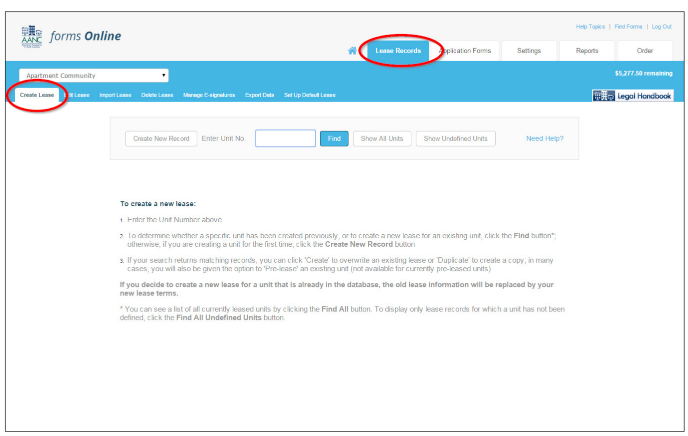


Working with Lease Documents

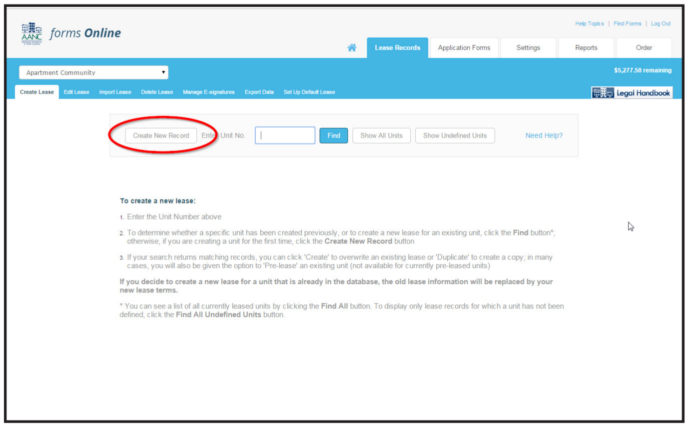
Creating a New Lease

Follow these steps to create a new lease:

1. With the ***Lease Records*** tab selected, click on ***Create Lease*** on the left side of the screen.

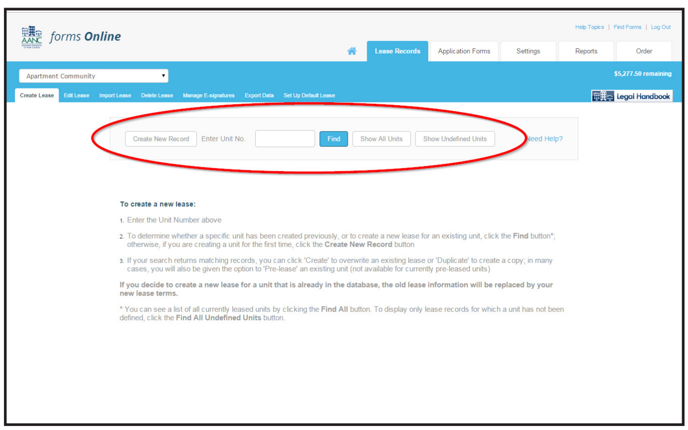


If the unit you are leasing has not been leased before, you may click the ***Create New Record*** button and skip to Step 5,



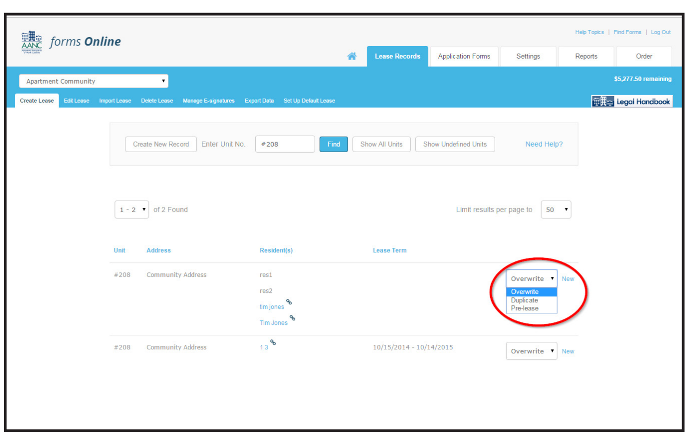
OR to determine if the unit you are leasing has a previous lease record, follow these steps:

- Enter the unit number in the ***Enter Unit No.*** field, then click ***Find*** to view previous lease records for this unit, OR
- Click ***Show All*** to view a list of all the currently leased units, OR
- Click ***Show Undefined Units*** to view a list of lease records where a unit is not defined



2. If there is an existing lease record, you have the following options:

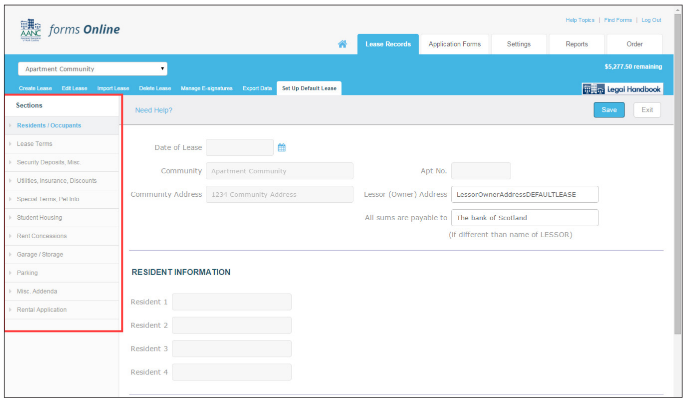
- ***Overwrite*** - you will overwrite the existing lease record with the new lease record
- ***Duplicate*** - you may create a new lease record for the unit without overwriting the existing lease record for the unit
- ***Pre-Lease*** - you will pre-lease the unit for which there is an existing lease record



NOTE:
There must be an existing lease record in order to create a pre-lease for a unit.

3. Select one of the options from Step 3 and click ***New***.

4. You have entered the lease editor. Complete each section of the lease and click ***Save*** in the upper right corner of the screen.



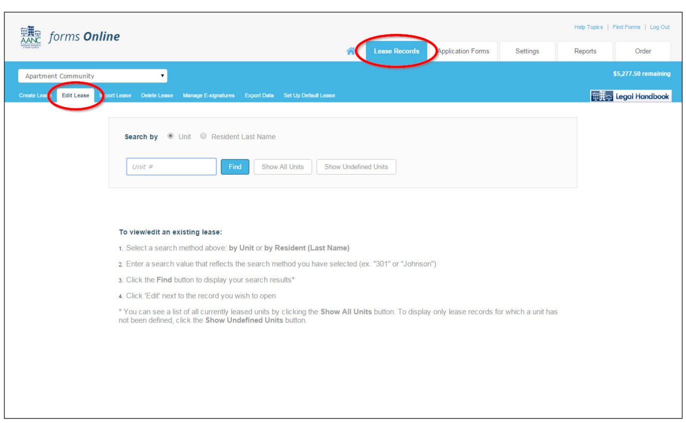
5. To view the print menu, click ***View Print Menu***. To exit the lease editor, click ***Exit***.

Editing an Existing Lease

At times you may need to edit a lease record before or even after it's been saved or printed. You may edit a lease record at any time, but if the lease has been generated previously, you will not be able to edit the lease terms.

Follow these steps to edit a lease:

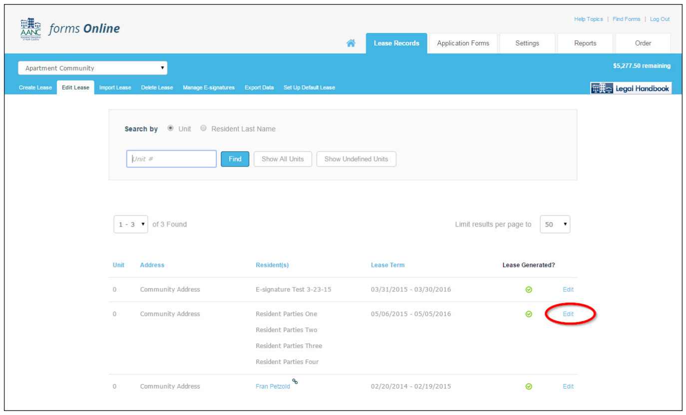
1. With the ***Lease Records*** tab selected, click ***Edit Lease*** on the left side of the screen.



2. You may search for a lease record by the Unit Number or Resident's Last Name. Select which option you prefer.

3. Enter either the unit number or resident's last name in the ***Search by*** field and click ***Find***.

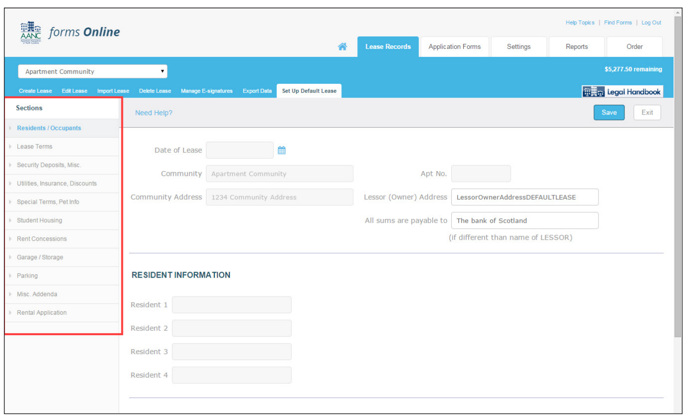
4. A list of lease records matching your search criteria will display. Locate the lease record you want to edit and click ***Edit*** to the right of that record.



NOTE:

If a lease has been generated for any unit, a green checkmark will appear in the ***Lease Generated?*** column for that unit.

5. You will enter the lease editor. View each section of the lease listed on the left side of the screen and edit any lease information as needed. As you edit information, click ***Save*** in the upper right corner of the screen.



NOTE:

If the lease has been generated previously, you will not be able to edit the lease terms including beginning and ending lease dates, resident(s) name(s), and rent.

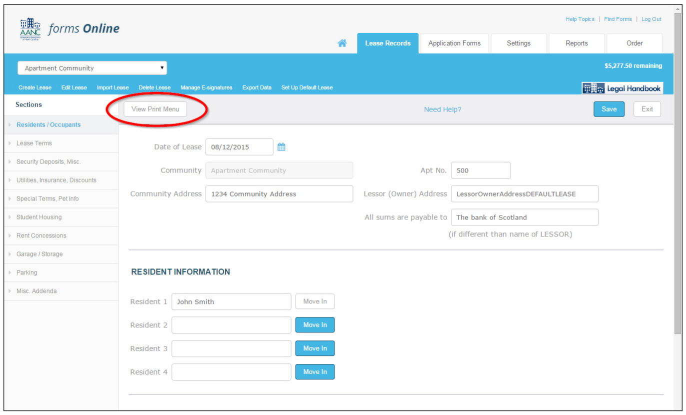
6. To view the print menu click ***View Print Menu***. To exit the lease editor click ***Exit***. If you have not saved your information, you will be prompted to save before exiting.

Printing a Lease

Once you've created, renewed, or edited a lease record you may enter the print menu to generate the needed lease forms for the resident to sign.

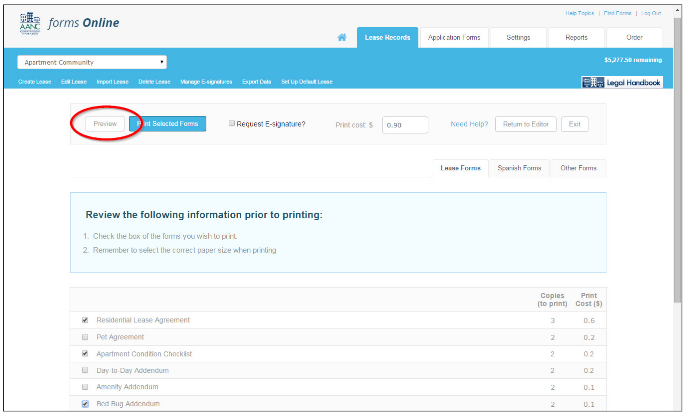
Follow these steps to generate/print a lease:

1. From the lease editor screen, click ***View Print Menu***.

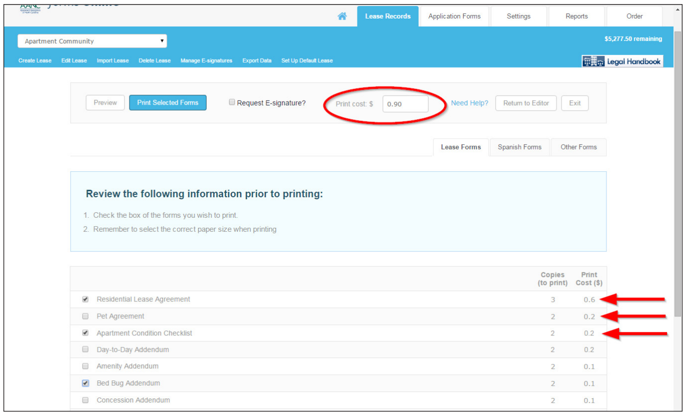


2. The print menu will appear. Check the box next to each form you would like to generate/print.

3. Click the ***Preview*** button to generate samples of the selected forms. You will not be charged any clicks to preview the lease. Review the sample forms to ensure all information looks accurate.



4. The cost to generate each form is listed in the ***Cost in Clicks*** column. The total clicks cost of your lease forms appears in the ***Print Cost*** field.

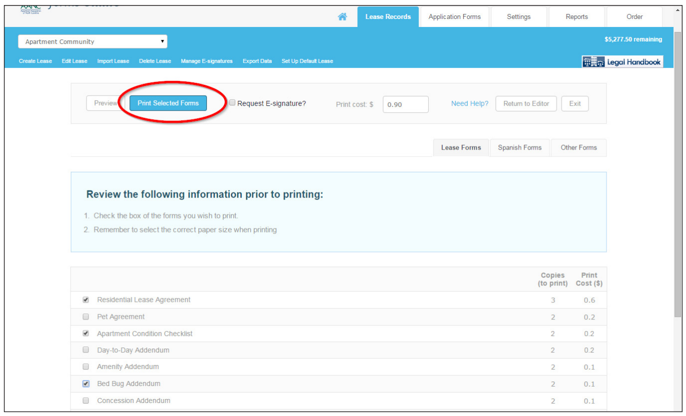


NOTE:

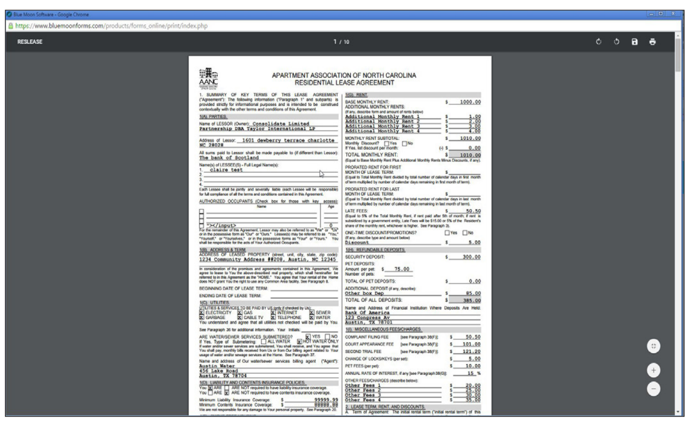
It is important to understand the information in the ***Copies to Print*** column. This is the number of copies recommended you print. But, the program doesn't force you to print the stated number of copies.

For example, it's recommended you print three copies of the Residential Lease Agreement. In the C***opies to Print*** column you see "3." In the ***Cost in Clicks*** column you see ".60." When you click the ***Print Selected Forms*** button you are charged .60, but you may send any number of copies to your printer. No matter how many copies you send to your printer, you've only been charged .60.

5. When you are ready to generate the final executable lease forms, click ***Print Selected Forms***.



6. A PDF file of your lease forms will display. You may print the file by sending the appropriate amount of copies to your printer, or you may save the file to your hard drive.



NOTE:

It's very important that you either print or save the file. If you close the file window without printing or saving, you will have to click ***Print Selected Forms*** again. When reprinting a lease you won't be charged clicks again as long as the Begins On date of the lease doesn't change more than 30 days. If it changes more than 30 days, the program views it as a new lease and charges the full amount to reprint it.

7. The print cost is deducted from your clicks counter in the upper right corner of the screen.

Application Forms

Printing the Rental Application and Other Forms

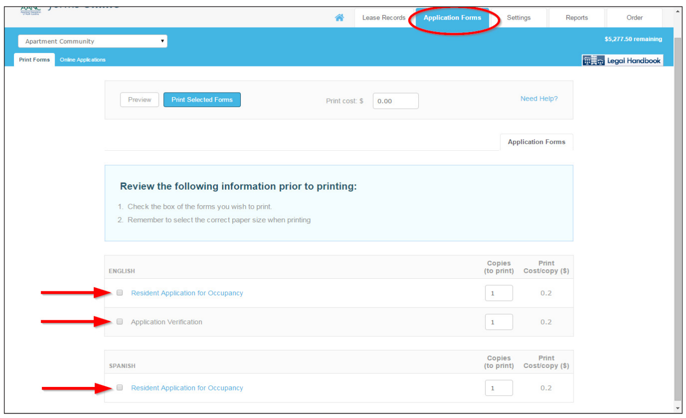
The Forms Online program allows you to print blank copies of the Rental Application to allow the resident to complete manually.

> ***NOTE:***
> The application forms are not found in the standard print menu.

Follow these steps to print out any application form:

1. Click the ***Application Forms*** tab.

2. Check the box next to each application form you'd like to generate/print.



3. Click ***Print Selected Forms***. A PDF file of the selected forms will display. Send the file to your printer to have the resident complete the form(s) manually.

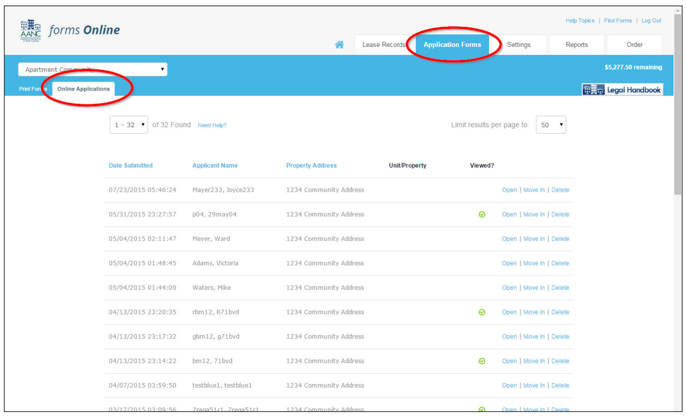
Blue Moon Online Rental Application

A link to the Blue Moon Online Rental Application may be placed on your property's website so that prospective residents may apply online. For more information on placing a link to the online rental application on your property's website, have your web administrator go to: https://www.bluemoonforms.com/?p=resources/onlinerentalapplication

When a resident has submitted the online rental application, an email notification is sent to your property. You may then manage the online rental applications submitted to your property by logging into the Forms Online program. You can view and print the applications, or move a resident in upon approval.

Follow these steps to manage your online rental application submissions:

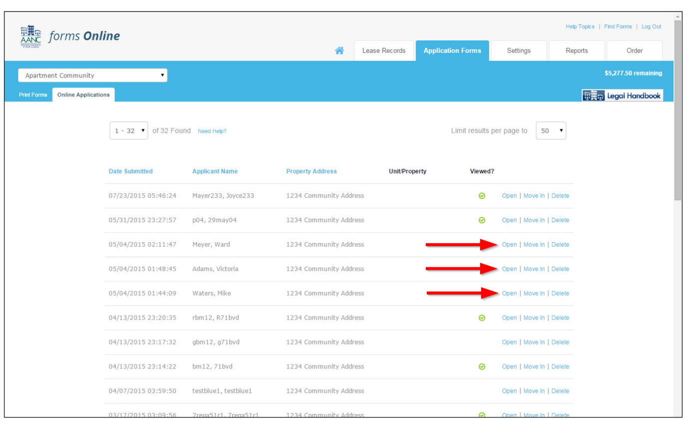
1. Click the ***Application Forms*** tab. Then click ***Online Rental Applications***.



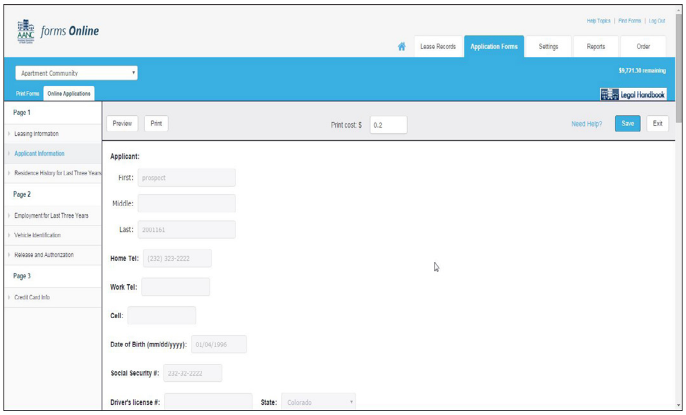
2. A list of the online rental applications submitted to your property will display including:

- the date and time the application was submitted online
- the applicant's name
- the property address
- the unit number
- whether the application has already been viewed

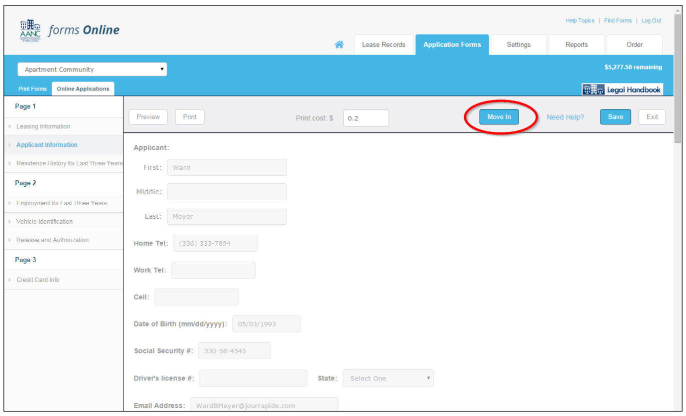
3. To open and view any application, click ***Open*** to the right of that record.



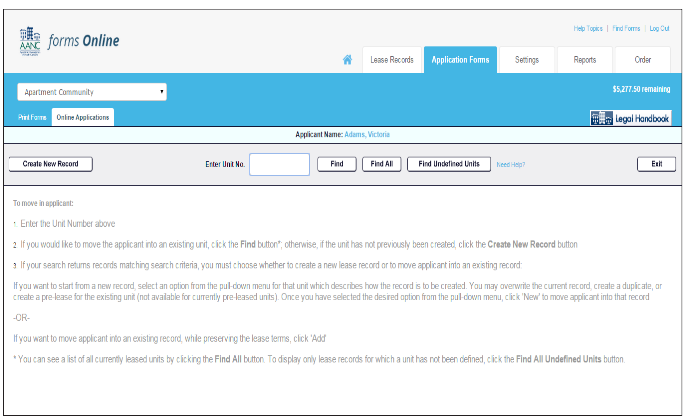
4. The application will open. You may view the information submitted by the applicant, but you cannot edit any of the information they've submitted. Click ***Preview*** to preview the completed application, or click ***Print*** to print it out.



5. To move the applicant into a unit click the ***Move In*** button.



6. You may now create a new lease record for the applicant. After you've created a lease for the applicant and entered the print menu you'll have the option to include their rental application as part of the lease forms package.



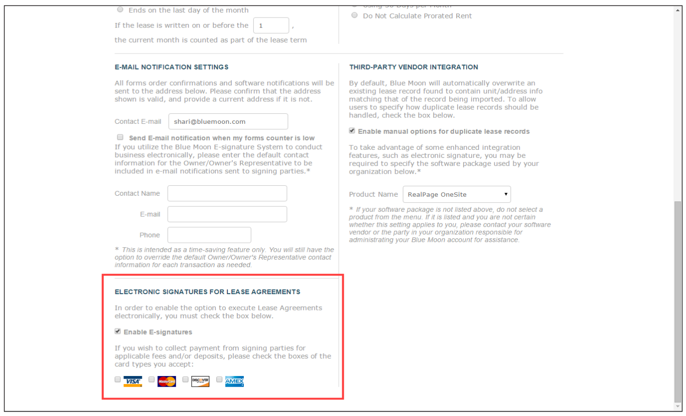
Electronic Signatures

Enabling the eSignature Feature

The Click & Lease program provides the eSignature feature free of charge. eSignature allows you to email the lease forms package to the resident, who is then able to electronically sign the lease. Once a lease has been signed electronically, you are able to retrieve the signed lease forms online.

Follow these steps to enable the eSignature feature:

1. Click the ***Settings*** tab. Make sure you are viewing the ***General Settings*** and scroll down until you see the ***Electronic Signatures*** section.



NOTE:
You must be logged in as a Master or Administrator to access these specific settings.

2. Check the box next to ***Enable eSignatures***.

3. If you wish to allow residents to submit credit card payments online for any applicable fees when signing electronically, select which credit cards you accept.

NOTE:
Blue Moon Software will NOT process any payment information. The resident will simply be able to submit credit card information when signing electronically. Your property will retrieve that information when executing the lease and you must process the payment according to your normal payment processing procedures.

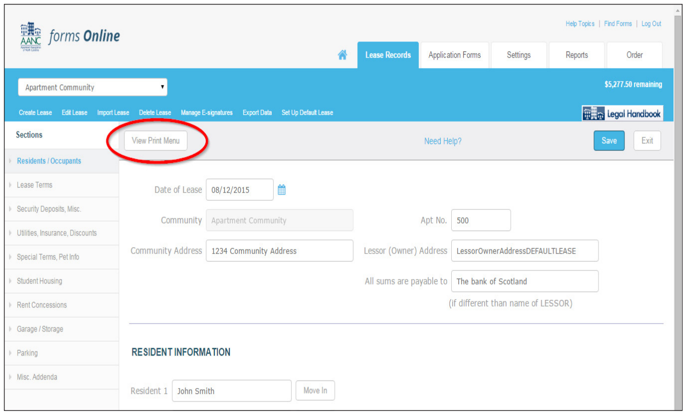
4. Scroll back up to the top of the screen and click ***Apply*** to save your changes.

Requesting eSignature from Resident(s)

Once the eSignature feature has been enabled, you may collect eSignatures from residents.

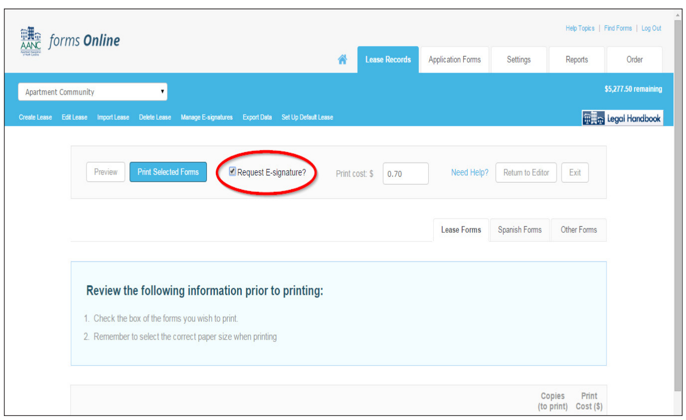
Follow these steps to request eSignature(s) from a resident/residents:

1. Make sure the ***Lease Records*** tab is selected and either create, edit, or renew a lease record. Once you are ready to generate the lease forms for the resident, click ***View Print Menu***.



2. In the print menu, select which forms you want to generate for the resident(s).

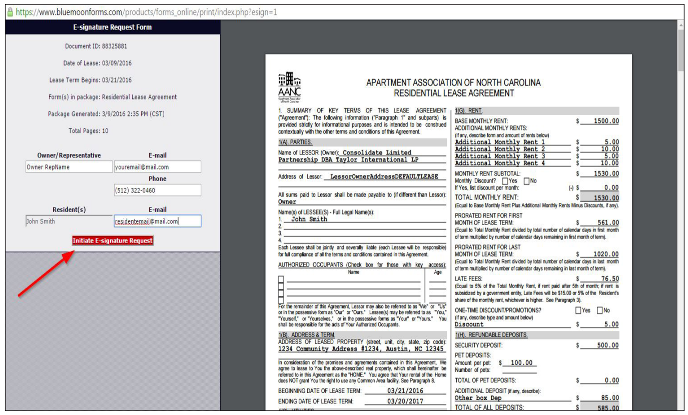
3. Check the box next to ***Request eSignature?***



4. Click ***Preview*** to review the lease forms for accuracy. When you are ready to send the forms to the resident(s), click ***Print Selected Forms***.

5. A PDF file of the lease forms will display along with an ***eSignature Request Form***. You must complete the following information before initiating the eSignature request:
   - Name of the Property/Owner Representative
   - Email Address of the Property/Owner Representative
   - Property Phone Number
   - Resident's Email Address
   - Any applicable fees or deposits you will be collecting
   - Description of any fees or deposits you will be collecting

6. Once all the required fields have been completed click ***Initiate eSignature Request***.



7. You will receive a message stating the eSignature request has been initiated. The resident will be notified via email that they have lease documents awaiting their eSignature.

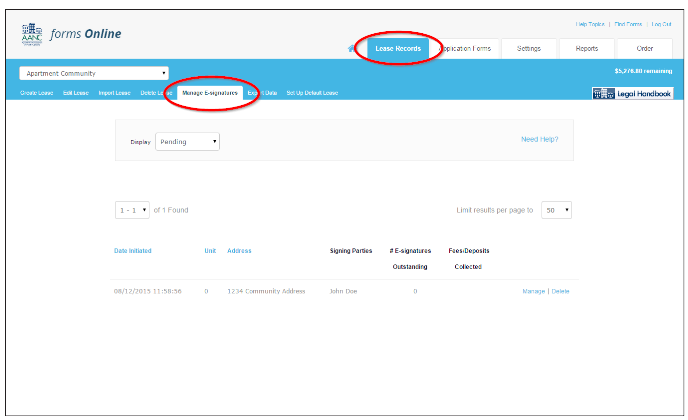
8. Once the resident has submitted their eSignature, you will receive notification via email.

Managing eSignature Requests

Once you have been notified that a resident has submitted their eSignature for lease documents, you may then retrieve the completed documents while logged into the Click & Lease program.

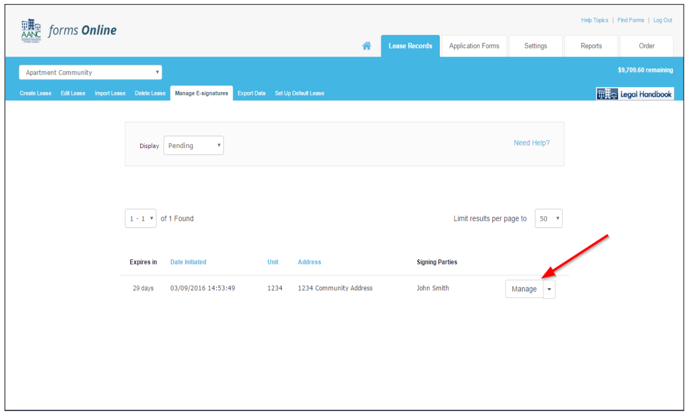
Follow these steps to manage eSignature requests:

1. With the ***Lease Records*** tab selected click on ***Manage eSignatures***.

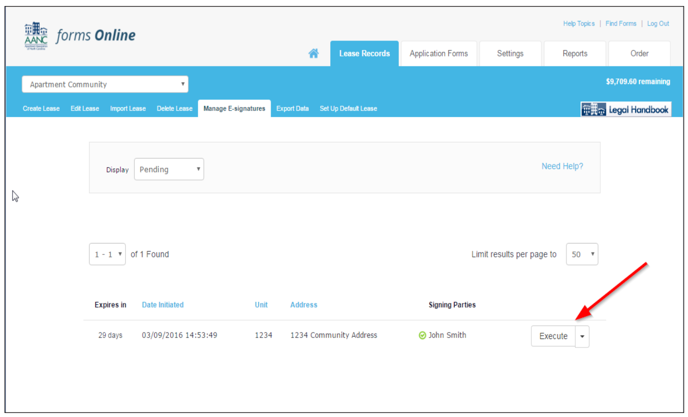


2. All pending eSignature records will display. To adjust which records display on this page use the ***Display*** menu to select from Pending, Entire History, Executed, or Lapsed.

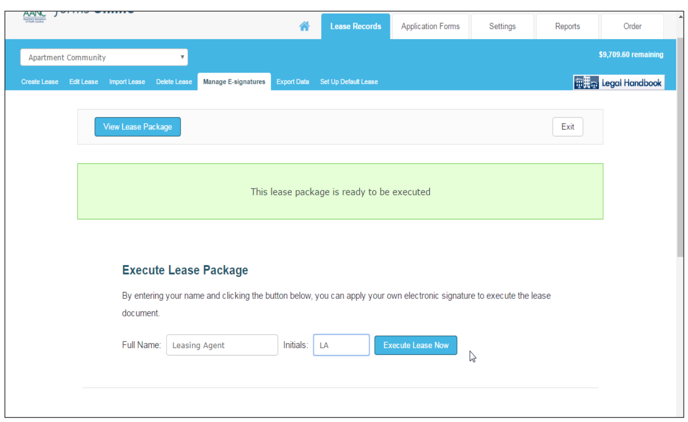
3. Each record displays the names of the signing parties for that lease. A green checkmark will appear next to the names for residents who have submitted their eSignatures. Click on ***Manage*** to the right of any record to view more details.



4. Or, if all residents have submitted their eSignature and the record is ready to be executed, you may click on ***Execute*** to the right of that record.



5. To apply your signature and execute the lease, enter your full name and initials in the appropriate fields in the ***Execute Lease Package*** section. Click ***Execute Lease Now***.



6. A message will display to let you know the lease was executed successfully.

7. Click the ***View Lease Package*** button to generate the PDF file of the executed lease forms.

8. The last page of the file will include the eSignature receipt page. You may now send the executed lease to your printer or save it to your hard drive.

NOTE:
It's very important that you either print or save the executed lease. The lease package will only be stored in the program for 30 days. Beyond the 30-day window, only the receipt page will be accessible.

9. To exit the Manage eSignatures screen click the ***Exit*** button.

Important Information Regarding eSignatures

Lease documents generated for eSignature are active for a 30-day period from the time the forms are generated, but can only be signed by the resident up until the start date of the lease.

For example, if a lease is generated for eSignature on 3/15/15, the lease forms will remain active in the program until 4/15/15. But, if the lease has a start date of 4/1/15, the resident(s) only have until 4/1/15 to e-sign the lease. After 4/1/15, if the resident(s) has not e-signed, the lease is no longer active and a new lease must be created for the resident(s).

Lease forms pending eSignatures can be viewed by the property and resident(s) as needed during this 30-day active period. After the 30-day period the lease forms are permanently deleted from the Blue Moon server. Blue Moon advises all parties to print and/or save a copy of the lease forms prior to the expiration date.

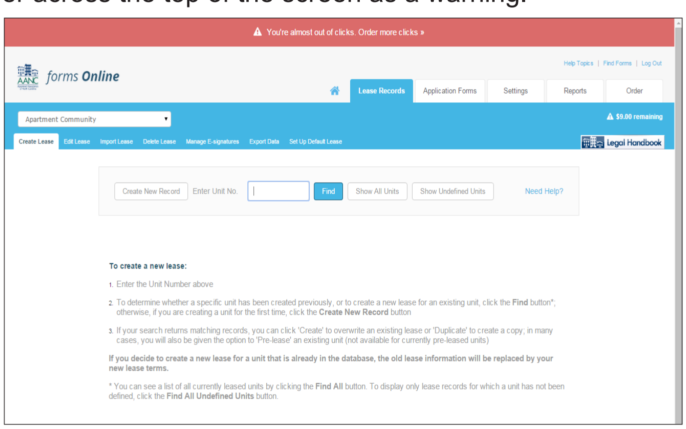
Please be sure that the contents of the lease documents are complete and accurate prior to submitting them for eSignature. If you need to change the contents of the lease forms after they have been sent for eSignature (but before they have been signed/executed), you should first delete the eSignature record from the Manage eSignatures section. Then you can edit the original lease record, enter the print menu and request eSignature again.

Once the lease forms have been signed, the signatures collected are stored on a permanent basis (unless deleted by the user) in the program. Within the 30-day active period, the entire lease package can be viewed. After the 30-day active period, only the eSignature Receipt can be viewed.

Ordering Clicks & Renewing the Software License

Clicks Counter

The number of clicks remaining on your counter is always viewable in the top right corner of the screen. It is important to remain aware of the remaining clicks to avoid running out and disrupting service.
When the clicks counter falls below 150/$10.00, a hazard symbol will appear next to the counter. You will also see a red banner across the top of the screen as a warning.



NOTE:
To receive an additional email notification when your clicks counter is low, go to `Settings > General Settings > E-mail Notifications`.

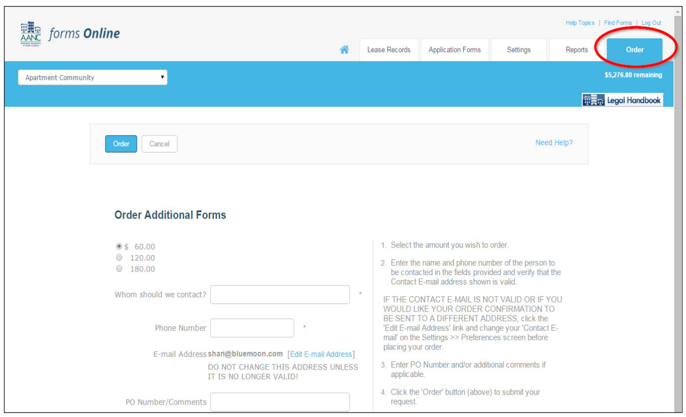
Ordering Clicks

When your clicks counter is low, you must order additional clicks in order to continue generating lease forms. Orders must be placed from within the Click & Lease program and the apartment association will invoice your property for these orders.

Once an order has been submitted, you must allow up to two business days for the apartment association to process the order and create an invoice. The apartment association will then send your order to Blue Moon Software for installation. Once your order is installed you will receive notification via email.

Follow these steps to order additional clicks:

1. Click the ***Order*** tab.



NOTE:
If a user has logged in with a user account that has been restricted from placing click orders, the Order tab will not be accessible. A Master or Administrator must log in to place the order.

2. Select the amount of clicks you would like to order.

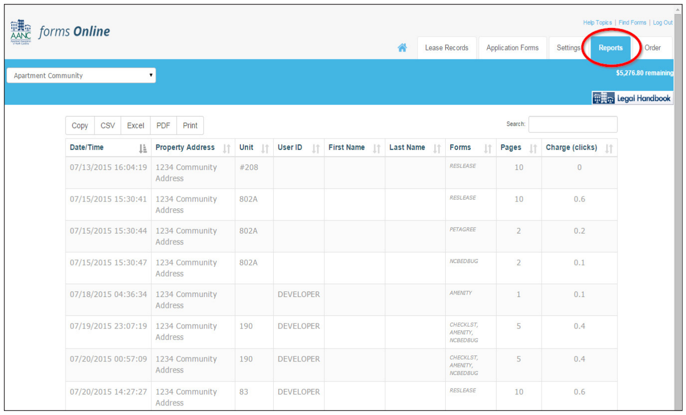
3. Enter your name in the ***Person Placing Order/Whom Should We Contact*** field.

4. Make sure the email address listed is a valid email address that notification can be sent to.

5. If your property requires a PO Number or if you have additional comments enter them in the ***PO Number/Comments*** field.

6. Once all fields have been completed click the ***Order*** button. Make sure you receive a message stating your order was submitted successfully. If you do not receive this message, please resubmit your order.

Reports: Print History



You may view a list of print transactions for the previous 30 days by clicking the ***Reports*** tab. You may view the date and time of each transaction, which user made the transaction, what forms were included in the transaction, and the clicks charge for the transaction.

> ***NOTE:***
> If at any point in time you have questions regarding a print transaction contact Blue Moon Technical Support at 512-322-0999.

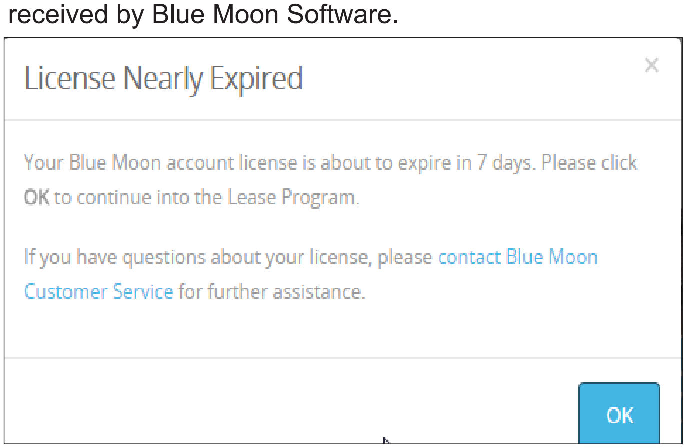
Renewing the Software License

Your software license expires annually based on the month that your property originally began service. For example, if your property began service on 3/15/15, your software license expires on 3/31 of 2016 and every year after that.

Annual license renewal invoices are mailed approximately 30 days before your license is scheduled to expire. Invoices are mailed to the billing address we have on file for your property. Invoices are also email to the billing email address on file.

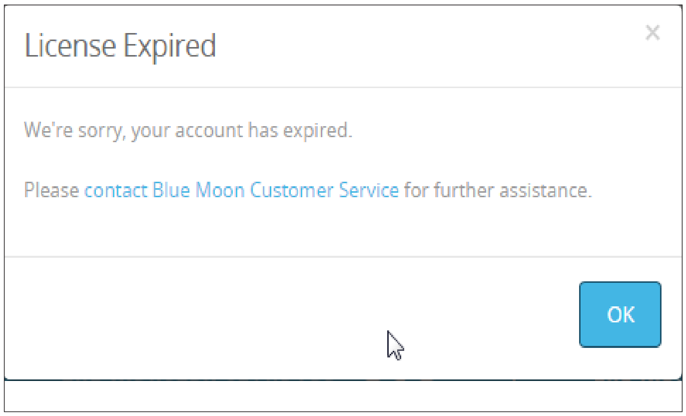
> ***NOTE:***
> If your property is enrolled in paperless billing, an invoice will NOT be mailed via USPS. Please make sure the paperless billing email address on file is up to date. Contact Blue Moon Software at 800-772-1004 to verify the correct billing email address is on file.

- Thirty days before your license expiration date, a pop-up message will begin to warn you upon logging in that your license will expire in a number of days. You will receive this message daily until payment is received by Blue Moon Software.



- If your expiration date occurs and Blue Moon Software has not received payment, a pop-up message will begin to warn you upon logging in that your license has expired and you have a 30-day grace period to remit payment. You will receive this warning daily until payment is received by Blue Moon Software.

- If the 30-day grace period passes and Blue Moon Software does not receive payment, your software license is automatically inactivated. At this point, no users can log into the account until payment is received. Upon login attempt, the user will receive the following message:

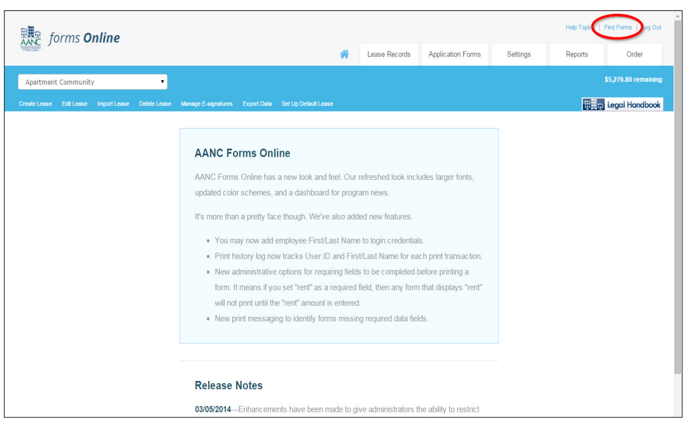


Lease Forms Available for Your State

The Click & Lease program includes a current list of available forms (in your state) and their location in the print menu.

Follow these steps to view a current list of the available lease forms:

1. Click the ***Find Forms*** link in the upper right corner of the screen.



2. A pop-up window will display a list of the available forms in your state and their location in the print menu.

Program Settings

Administrative Access & Multiple Users

The ***Settings*** tab in the Click & Lease program houses options for configuring your software license. You may view General Settings and Property Settings for your license as well as configure lease editor and print settings, and manage user accounts and custom forms.

Master User ID/Administrator Access

By default, Blue Moon Software creates the Master User ID based on what is entered in the User ID field on the original order form submitted to Blue Moon Software. When your online account is created, an account activation email is sent to the address indicated on the order form. The person that receives the email will be asked to finish the account creation process by entering their First and Last Names, the User ID, and a password. This person will now be considered the Master user.

The person(s) with the Master login information has unrestricted access to all the features of the program. Most often, the person(s) with the Master login information will be accessing the ***Settings*** tab in the program to make any changes.

Access Levels Explained...

- MASTER -- original User ID entered when the account was created; has full access
- ADMINISTRATOR -- additional User ID created by Master user; has full access
- USER -- additional User ID created by Master or Administrator; has restricted access

NOTE:
The Master user will be marked with a red asterisk when viewing the User ID list in the Manage Users settings of the program.

Keep in mind that user accounts are managed either at the property level or management company level. Depending on your property or company's operating procedures all property staff may have access to the Master User ID or individual User IDs may be created for each staff member.

Multiple Users

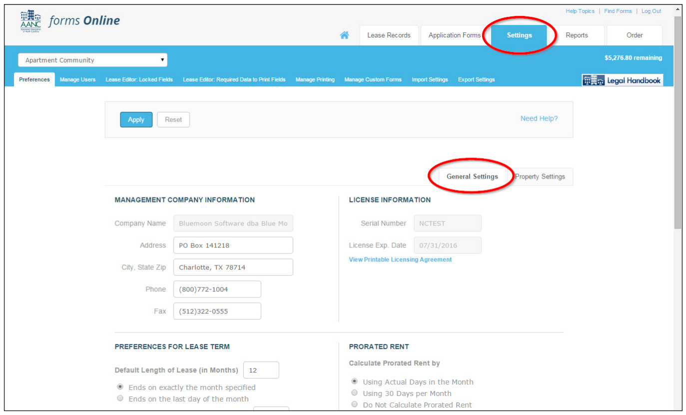
The Click & Lease program allows multiple users to log in and work in the same account simultaneously. Any changes made to lease records are not always in real time. You should be aware of the following scenarios when multiple users are working in the same account simultaneously.

- The number of clicks displayed in the clicks counter is not updated in real time. This means that the clicks used by one user when printing, may not be reflected in the clicks counter for another user logged into the same account on a different computer until the clicks counter is refreshed.
- The last changes saved take precedence over all previous actions. If two users are working in the same lease record simultaneously, any changes that User A has saved will be overridden by any changes User B saves after User A. Blue Moon Software recommends only one user work in a lease record at any given time.

General Settings

Follow these steps to access General Settings:

1. Click the ***Settings*** tab, then click ***General Settings***.



General Settings include:

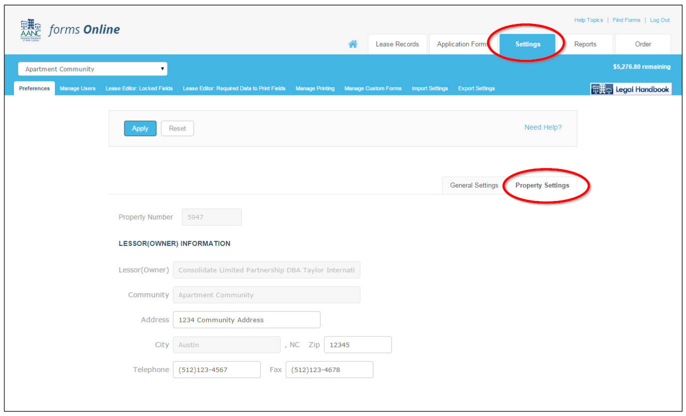
- ***Management Company Information*** - update the company address/phone/fax here
- ***License Information*** - your license/serial number and expiration date are listed here
- ***Preferences for Lease Term***
  - select the default length of your lease (in months)
  - select whether you want the lease to end on the exact month and day specified or end the term on the last day of the month
  - if the lease term starts on or before a certain day in the month (enter that day), then the current month is considered part of the lease term
- ***Prorated Rent*** - select how your property will calculate prorated rent
- ***Email Notification Settings***
  - provide a current property email address
  - check the box if you would like to receive an email when the clicks counter is low
  - if you plan to use the eSignature or online lease guaranty feature include the default contact information to be included in email correspondence to the resident
- ***Electronic Signatures***
  - check the box to enable the eSignature feature
  - select whether you utilize the NAA Rental Application
  - select any credit card types you wish to accept online payment from (if any)
- ***Online Lease Guaranty***
  - you may disable the use of the Online Lease Guaranty services
  - you may disable the use of the Online Guarantor Pre-Lease Application
- ***Third-Party Vendor Integration***
  - check the box to enable manual options for when a duplicate lease record is found when using a third-party vendor software (like Yardi, Onesite, MRI, etc.)
  - select the third-party vendor software your property uses (if any)

Property Settings

NOTE:
If you have multiple properties linked to your Click & Lease license, the information that displays on this screen may vary depending on which property you have selected in the ***Select Property*** menu.

Follow these steps to access Property Settings:

1. Click the ***Settings*** tab. Then click ***Property Settings***.



Property Settings include:

- ***Property Number*** -- your property number may be needed for 3rd-party integration
- ***Lessor Owner Name*** -- your property's owner name or property name will display here
- ***Community*** -- your property's name will display here
- ***Property Address***, City, State, Zip
- ***Property Telephone*** & Fax Numbers

Manage Users

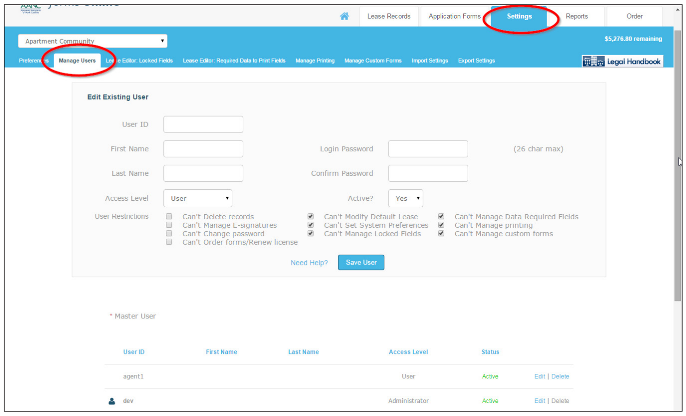
Any Master or Administrator may manage user accounts by adding new users, editing existing users, changing password, or assigning access rights to users. You should be aware of the following information regarding the Master User ID:

- The Master User ID cannot be deleted or deactivated
- The Master User ID cannot be changed/renamed
- Only a user logged in with the Master User ID can change the password for the Master User ID
- The Access Level assigned to the Master User ID cannot be demoted to "User"

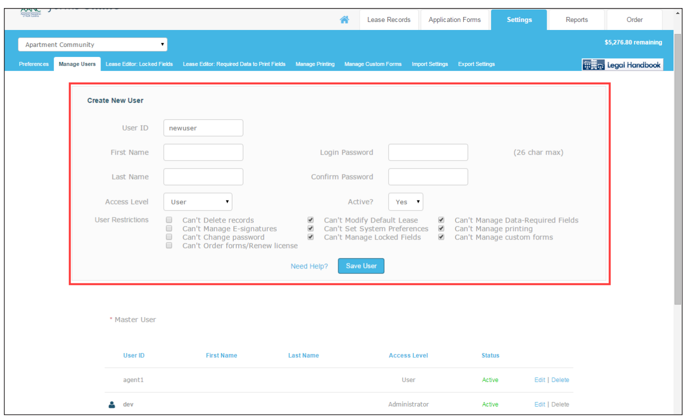
Creating a New User Account

Follow these steps to create a new user account:

1. Click the ***Settings*** tab. Then click ***Manage Users***.



2. Enter a new and unique name in the ***User ID*** field. Tab to the next field and the window header "Edit Existing User" will change to "Create New User" because the system will recognize a new User ID has been entered.



NOTE:

The User ID chosen should not match any of the existing User IDs listed in the user list. Otherwise, settings for the existing account bearing the same User ID may be overwritten. It is NOT possible to have more than one account with the same User ID.

When creating a User ID there is a 20-character limit. Characters entered can only be letters and numbers. No spaces or symbols are allowed. User IDs are NOT case-sensitive, which means that "willows" is the same as "WiLLoWs."

3. Enter the ***First*** and ***Last*** names of the person you're assigning this User ID to.

4. Select an option from the ***Access Level*** menu. You may select from User or Administrator:

- ***User*** - this option allows you to restrict this user from accessing certain program features
- ***Administrator*** - this option allows the user unrestricted access to all program features

5. If you selected “User” in Step 4 you may restrict the user’s access in the following ways:

NOTE:
By default, the boxes next to the following four settings WILL NOT be checked.

- ***Can’t delete records*** - user cannot delete lease records
- ***Can’t manage eSignatures*** - user cannot retrieve or manage leases that are E-signed
- ***Can’t change password*** - user cannot change their password, nor can Blue Moon Software help them reset their password
- ***Can’t order forms/renew license*** - user cannot order clicks nor renew the software license

NOTE:
By default, the boxes next to the following six settings WILL be checked.

- ***Can’t modify default lease*** - user cannot modify the default lease settings
- ***Can’t set system preferences*** - user cannot modify any preferences in General Settings
- ***Can’t manage locked fields*** - user cannot modify which fields are locked in the lease editor
- ***Can’t manage data-required fields*** - user cannot modify which fields require data to print
- ***Can’t manage printing*** - user cannot modify which forms appear in the print menu
- ***Can’t manage custom forms*** - user cannot modify which custom forms are available to print

NOTE:
A “User” may access the Settings tab in the program but will only have access to certain program settings based on the selections you make in Step 4.

Each of the program features referred to above are further explained in the upcoming sections of this manual.

6. Make sure “Yes” is selected in the ***Active?*** menu. If “No” is selected, the user will not be able to log into the Click & Lease program.

7. Enter a password in the ***Login Password*** field.
   Re-enter the password in the ***Confirm Password*** field.

8. Click the ***Save User*** button. The user account you created will now appear in the User list.

NOTE:
In the User list, the Master User ID will be marked with a red asterisk.

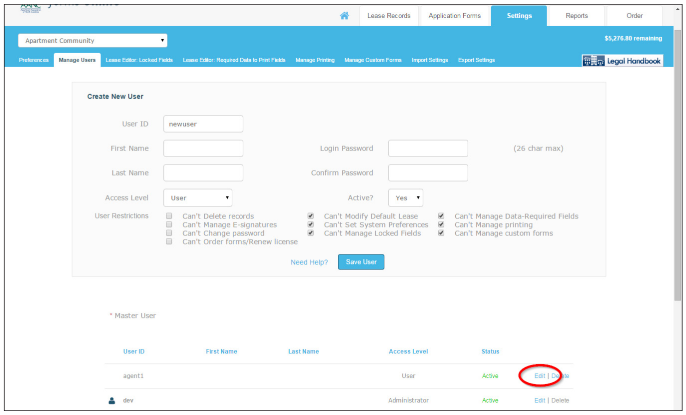
Edit an Existing User Account

The account settings for an existing user account can be modified by a Master or Administrator user. For instance, if a user account has been restricted from placing click orders, a Master/Administrator can log in and lift that restriction by editing the user account settings.

Follow these steps to edit an existing user account:

1. Click the ***Settings*** tab. Then click ***Manage Users***.

2. In the User list, locate the user account you want to edit. Click ***Edit*** to the right of that account.



3. The fields in the ***Edit Existing User*** window will populate with the current settings for the selected user account. You may then modify any of these settings or even change the password.

4. After making the desired changes, click the ***Save User*** button.

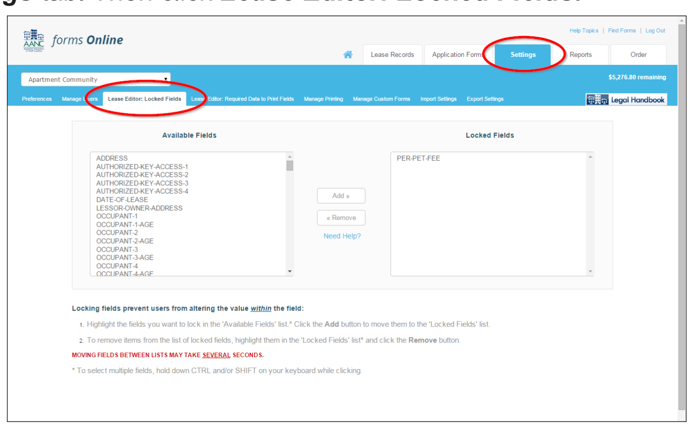
NOTE:
The User ID for any account cannot be changed. If a new User ID is entered in the User ID field when trying to edit an existing account, once the Save User button is selected a NEW user account will be created.

Lease Editor: Locked Fields

A Master or Administrator may edit which fields in the lease editor are available to modify and which fields are locked for restricted users. For example, an administrator may want to lock the “Consent necessary for guests staying longer than X days” field on the lease. The administrator can enter five days in the default lease settings and then lock the field so that a restricted user cannot modify it. Locked fields will appear grayed out to a restricted user.

Follow these steps to modify Lease Editor: Locked Fields settings:

1. Click the ***Settings*** tab. Then click ***Lease Editor: Locked Fields***.



2. The ***Available Fields*** window displays all the fields in the lease editor that can currently be modified by a user.

3. To lock a field, select that field in the ***Available Fields*** window and click the ***Add*** button to move it to the ***Locked Fields*** window.

4. To unlock a field, select that field in the ***Locked Fields*** window and click the ***Remove*** button to move it to the ***Available Fields*** window.

NOTE:
To select multiple fields at once, press the `CTRL` key while selecting individual fields. Press the `SHIFT` key to select multiple fields in a row.

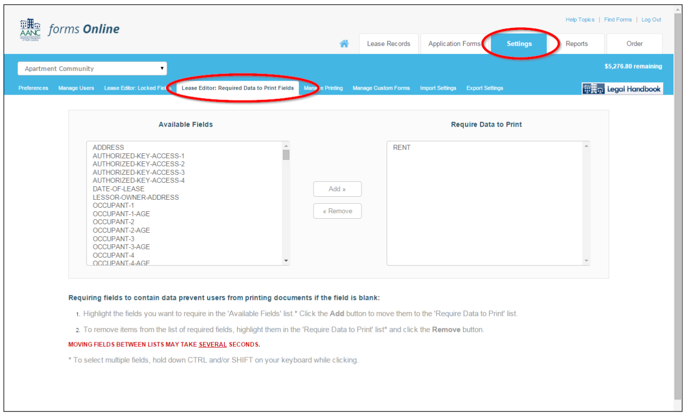
Lease Editor: Required Data to Print Fields

A Master or Administrator can manage what fields in the lease editor require data input in order to allow printing. For example, an Administrator can make the RENT field require data input so that any form that has a RENT field cannot be generated/printed if the user has not entered a rent amount.

NOTE:
When a field requires data it will appear in the lease editor outlined in red with an asterisk next to it. The user will receive a message when attempting to print a form with missing data informing them to complete the missing fields.

Follow these steps to manage Lease Editor: Required Data to Print settings:

1. Click the ***Settings*** tab, then click ***Lease Editor: Required Data to Print Fields***.



2. The ***Available Fields*** window displays all the fields in the lease editor that can be made to require data input.

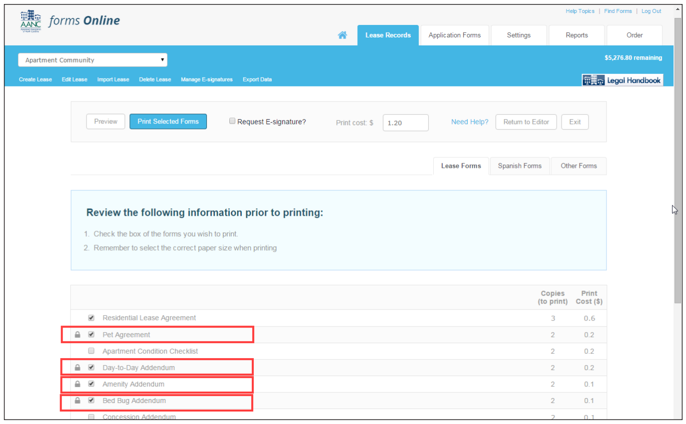
3. Select a field in the ***Available Fields*** window and click the ***Add*** button to move it to the ***Required Data to Print*** window. Any field added in this manner will require data input before allowing a user to print forms.

4. Select a field in the ***Required Data to Print*** window and click the ***Remove*** button to move it to the ***Available Fields*** window. Any field removed in this manner will not require data input before allowing a user to print forms.

Manage Printing

A Master or Administrator can manage what forms automatically print out as part of a lease package (known as locking forms in), or removing forms that appear in the print menu for restricted users (known as disabling forms).

Forms that are selected to always print in the Manage Printing settings appear in the print menu with a padlock icon next to them (see image below). This means that these forms will automatically be selected any time an apartment lease contract is selected. These forms cannot be deselected by a restricted user.



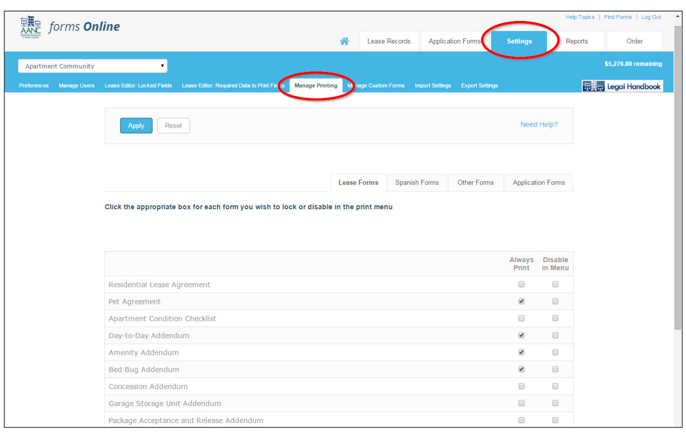
NOTE:

If the apartment lease contract is NOT selected, the locked forms become unlocked and the user can deselect them if desired.

Forms that are disabled in the Manage Printing settings will not appear in the print menu at all for a restricted user.

Follow these steps to manage print settings:

1. Click the ***Settings*** tab. Then click ***Manage Printing***.



2. Check the box in the ***Always Print*** column next to the forms that you want to lock in as part of a lease package in the print menu.

3. Check the box in the ***Disable in Menu*** column next to the forms that you want to remove from the print menu altogether.

4. Click ***Apply*** to save your changes.

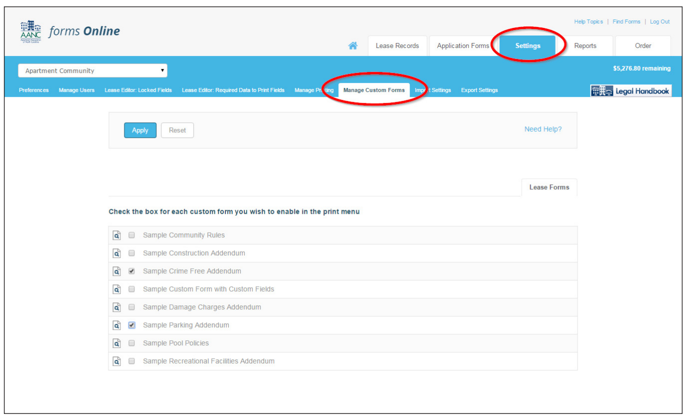
Manage Custom Forms

Some management companies require the ability to include custom forms in their lease packages that are not found in the standard set of lease forms available in the Click & Lease program. In these cases, Blue Moon Software can work with management companies to make these custom forms available in the program for their portfolio of properties.

Custom forms are management company-specific, meaning your management company must contact Blue Moon Software with custom forms requests. It is the responsibility of the management company to manage the use of their own custom forms across their portfolio of properties. If your company has arranged for its own custom forms to be included in the program, the forms must first be activated by a Master or Administrator in order to be available for printing in the print menu.

Follow these steps to manage custom forms:

1. Click the ***Settings*** tab, then click ***Manage Custom Forms***.



2. A list of the custom forms available will appear. To preview a custom form click the ***View*** icon to the left of that form.

3. Check the box next to a custom form to make that form available in the print menu.

4. Click ***Apply*** to save your changes.

NOTE:
Once a custom form has been enabled, you can then manage that form in the Manage Printing settings by following the instructions in the previous section titled “Manage Printing.”

Import & Export Settings

A Master or Administrator can store configuration settings for the license to a file that can then be imported or exported to another license.

The settings that can be stored to a file include:

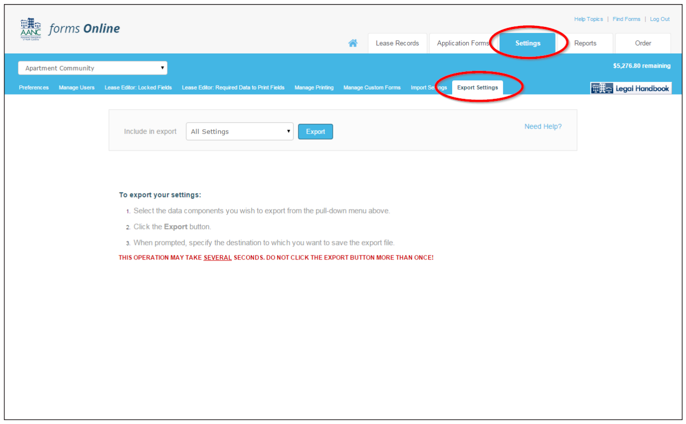
- system preferences
- locked lease fields, data-required fields, print menu settings, and custom forms
- default lease settings

For example, if a management company has configured the account for Property A, and they want Property B configured exactly the same way, the company can export the settings from Property A’s license, and import them into Property B’s license.

How to Export Settings

Follow these steps to export the settings of your Click & Lease software license:

1. Click the ***Settings*** tab. Then click ***Export Settings***.



2. In the ***Include in Export*** menu select which settings you want to export to a file. Your options include ***All Settings***, ***System Configuration Only***, or ***Default Lease Only***.

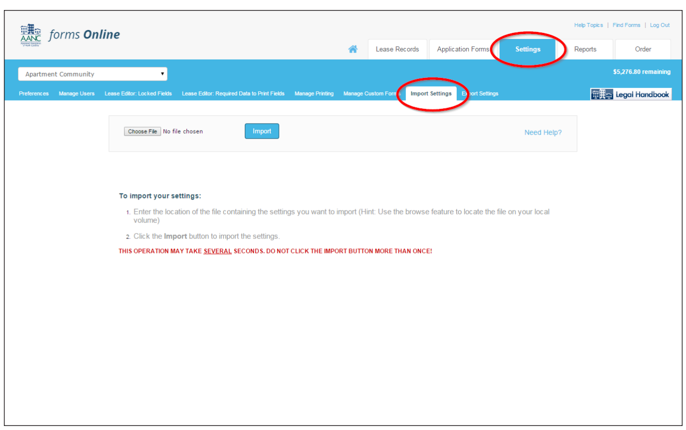
3. Click the ***Export*** button. A window will appear allowing you to choose a location to save the settings file to. Once you have selected a location, click the ***Save*** button.

NOTE:
Do NOT modify the contents of the settings file!

How to Import Settings

Follow these steps to import settings to your Click & Lease software license from a settings file:

1. Click the ***Settings*** tab. Then click ***Import Settings***.



2. Click the ***Choose File/Browse*** button. A window will appear allowing you to locate the settings file you wish to import. Select the file. Then click the ***Import*** button.

3. A warning message will appear. If you are sure you want to proceed, click ***OK***. ***When a settings file is imported, all previous settings will be overwritten and this action cannot be undone. Please be sure you want to overwrite the existing settings before clicking OK.***

4. When the settings file has been imported successfully you will receive a message. Click ***OK***.