



TSRs are **FREE** online property reports created by KeyTrack[®] Licensed Law Firms for all interested parties to access at: www.KeyTrack.co.nz aided by Email & SMS Text Updates.

To login to the KeyTrack[®] website enter your Username and Password at the 'Login Here' section of our website and click on 'GO'.

'My TSRs' Tab

Transaction Status Reports (TSRs)

All of your 'open' TSRs, that are created by a KeyTrack[®] licensed law firm (*detailed a signed Sale and Purchase Agreement received by them*) are listed under the 'My TSRs' tab. To open the TSR relating to the property address, click the  icon under the 'View TSRs' column. The new screen that appears is the TSR. Under the 'Real Estate Agency Notes' section in the TSR, you can add your own notes. After you type your message, click 'Add Note' to action the sending of an 'Update Email' via KeyTrack[®] to all TSR participants. KeyTrack[®] automatically notifies all interested parties, simultaneously by email, once the file (TSR) is updated.

When a property deal settles the TSR is no longer 'open'. You can view 'closed' TSRs by clicking  Closed under 'Status' in the search bar then click 'Search'.

'My Info' Tab

To update your contact details overwrite existing information then click 'Update' to save any changes.

If you do not wish to receive KeyTrack[®] newsletters regarding new firms, new functionality or our news, please untick the 'Signed to Newsletter' box and then click on 'Update' to save this change.



Branch Managers and Administrators have the same functionality as other Real Estate users but they can also do the following:

'Branch' Tab

Branch Details

You are able to edit your branch contact details by over typing existing information. Ensure you click 'Update' to save these new changes. If your branch administrator or manager has changed, please contact us to update this for you.

Adding New Agent

To add a new agent to your branch records click on  [Add a New Agent](#) under the 'Branch Details' tab. A screen will appear for you to fill in the agents details. A username, password and phone number will automatically be generated; these can be overtyped if necessary. When completed click on 'Add' and the following message will appear to confirm the new agent has been added  Successful Insert.

Editing Existing Agent

To edit existing agent's details click 'Edit' under the 'Action' column next to the appropriate agent. A new screen will appear where you can over type any changes that need to be made. Ensure you click 'Update' to save these new changes.


Archive Existing Agent

To remove an agent from your branch records click 'Archive' under the 'Action'. A pop up box will appear asking 'Are you sure you want to archive this agent?' Press 'OK' to confirm. By clicking 'OK' the agent will be removed and your page automatically refreshed.

Set BCC Email Address


Branch administrators are able to set a BCC email address, so that someone else will also receive a copy of all 'Administrator' emails that are generated by KeyTrack[®] Licensed Law Firms.

'View TSRs' Tab

To view your agent's TSRs click on '**View TSRs**' then under then the according name under '**View TSR For**'. To open the TSR relating to the property address click the  icon under the '**View TSRs**' column.

To view TSRs for all agents in one list click '**View all Branch TSRs**'.

Extra KeyTrack® Features for all Real Estate users (at cost)

***NB:** To view, or print any of your Text Message or MSR invoices click on the '**My Invoices**' tab and select the invoice you want to print from the 'Invoice No.' column, then click on the  icon.*

'Text Messaging' Tab

PC2TXT Service

This is a premium texting service that you can elect to use when logged into KeyTrack®. Branch agents are all preloaded, saving you time entering their names and numbers. Texts cost 25c (*inc GST*) each. KeyTrack® invoices you each fortnight directly (*via email*) for any TXTs you have sent. This service is ideal for Branch Managers / Administrators to utilise when coordinating sales meetings with their agents.

Under your '**Text Messaging**' Tab you can TXT your branch staff (Other users at your Agency), any staff at your company nationwide (*other agents in your group*) who are listed in KeyTrack®, or your clients. You can add clients to your database under the '**MSRs**' then '**My Clients**' then '**Add New**' tab.

Once you have selected recipients click '**Add/Remove recipients**'. To remove recipients untick the box corresponding with their name and click '**Add/Remove recipients**' again. Type your TXT message in the '**Your Message**' box then click '**Send Message**'. A pop up box will appear asking '**You are about to send a text to (amount of recipients) recipients. This will cost \$(total cost). Click on 'OK' to proceed or cancel to abort sending message.**' A confirmation message will then appear advising who the text was sent to, how much you were charged and your transaction reference. A copy of your text is sent to you (*via email*).

'MSRs' Tab

Marketing Status Reports (MSRs)

MSRs are shared online reports that Real Estate Agents can create in KeyTrack® to assist with the communication of important marketing data to their vendor clients and others (Branch Manager/Administrator), prior to an Agreement being signed. MSRs cost just \$5 each (*inc GST*) or you can purchase a package of 15 MSRs for just \$50 (*inc GST*). KeyTrack® will invoice you directly for MSRs by email. **NB:** Administrators & Managers can also create MSRs for their agents under their 'MSR' tab. Please contact us on 0800KeyTrack if you need any assistance.

To create a New MSR, click on '**New MSR**'. This is **Step 1**, where you add your client's details (*email and mobile number*). Then click on '**Next**' at the bottom of the page to go to **Step 2**. Here you can add another Agent or an '**Other Interested Party**' by clicking on the links and adding their contact details to the MSR. If there are no others involved, just click on '**Next**' to continue. **Step 3**. This is where you enter the details of the vendor client's property that is being marketed for sale. Then click on '**Next**' to proceed. Then you check through the '**Confirmation for creating a new MSR**' summary. You need to check the KeyTrack® Terms & Conditions box & then click on '**Create MSR**' if all the participants and details correct.

The 'Result for creating a new MSR' page asks you how you would like to pay for the MSR. You can either pay by Credit Card, or we can invoice you (*invoices are emailed to agents the following Monday*).

FREE user support is available for you during business hours

Email us at: Info@KeyTrack.co.nz

Or call us on our Freephone line: **0800KeyTrack** (0800 539 872)

