

VANTACA SETUP GUIDE

Give Superkey access to Vantaca

About 10 minutes for a Vantaca administrator

Superkey reads your associations' records in Vantaca so we can keep their insurance accurate: who the board is, how many units there are, who the owners are, and which policies and documents are on file. We only read. We never add, change or delete anything in Vantaca.

USER EMAIL <code>insurance@superkey.com</code>	ACCESS LEVEL View only
ASSOCIATIONS The All portfolio	SIGN-IN CODES By email to <code>insurance@superkey.com</code>

Before you start

- You need a Vantaca user who can manage Users, Roles and Responsibilities. This is usually your Vantaca administrator.
- In Vantaca, a user can only sign in once it has a **Responsibility**. A Responsibility pairs a Role (what the user can do) with the associations it can see. Without one, sign-in fails with "Invalid Login Information!".
- Use `insurance@superkey.com` exactly. Our team monitors that inbox, and sign-in codes must reach it.

Steps

1

Create the user

Go to **Settings > Users > New User** and enter:

FIRST NAME Superkey

LAST NAME Insurance

LOGIN `superkey.insurance` , or your usual format

EMAIL

insurance@superkey.com

CELL NUMBER

(207) 770-5673, our team's shared line. Texts to it land in our shared inbox.

REQUIRE 2 FACTOR
AUTHENTICATION

Checked, if your company uses it

Set a temporary password and click **Update**.

2

Choose a view-only role

Vantaca's built-in **Outside Accountant** role is a view-only role made for outside firms. Use it if it can view these areas. If it can't, copy it under **Settings > Roles > Copy**, name the copy **Superkey (view only)**, and turn on **View** only for:

AREA IN VANTACA	WHAT WE USE IT FOR
Association (including Edit Association, view only)	Legal name, tax ID, number of properties
Association > Insurance	Current policies on file
Board/Committee Members	Board contacts for renewals and certificates
Homeowner List, including Export to Excel	Owner and unit roster for the schedule of values and master policy certificates
Homeowner details	Community and unit addresses
Documents	Governing documents, budgets and reserve studies
Vendors	Your communities' insurance and service vendors

3

Create a Responsibility

Go to **Settings > Responsibilities > + New Responsibility**. Name it **Outside Accountant – Superkey** (or use your copied role's name), pick the role from step 2, and click **Update**.

4

Assign the user and all associations

Open the new Responsibility.

- On the **Users** tab, click **+ Assign New User** and choose the Superkey user.
- Under **Portfolios**, click **+ Add Portfolio** and choose **All**. New associations are then included automatically.

If you'd rather limit access to the associations Superkey insures, use the **Associations** tab instead and tick each one.

Give this user only this one Responsibility. If a user has two, Vantaca applies the stronger role's permissions everywhere.

5 Check two-step verification

Your company-wide setting is under **System > System Settings > Security > Two Factor Login**. Either setting works for us: "Required for all users", or "Users can be enabled individually" with the box from step 1 checked. Codes go to insurance@superkey.com or by text to (207) 770-5673, and are good for 15 minutes.

6 Send us the sign-in details

Vantaca doesn't email new users their login. Email insurance@superkey.com with your Vantaca company ID and the Login from step 1. Don't put the password in the same email; call us at (207) 770-5673 with it instead. We'll change it when we first sign in.

Prefer an API connection?

Vantaca offers API access to partners. If you'd rather connect Superkey that way, tell us and we'll coordinate with Vantaca.

Removing access

You stay in control. You can see this user's sign-ins under **Management > User Activity**. To end Superkey's access at any time, remove the user from the Responsibility or deactivate it.

Questions? Email insurance@superkey.com or call (207) 770-5673.