

# Keeper Security "Create New" Button

## System Instructions

### Introduction

The Create New button is one of the most important controls within Keeper Security and offers the ability to create and store Website or Application password and online payment information. Additionally, you can also create Folders and Shared Folders to help organize Records for yourself or for your team if access to some sites is shared.



### Create New Record

1

To create a new **Record**, click the **Create New** button, then click the **Record** option in the drop down. This will open a new window.

New Record
Cancel
Save

My Vault ▶ New Record

Title

Login

Password

Website Address

+ Custom Field

+ Files or Photos

+ Add Two-Factor Code ?

Note

2

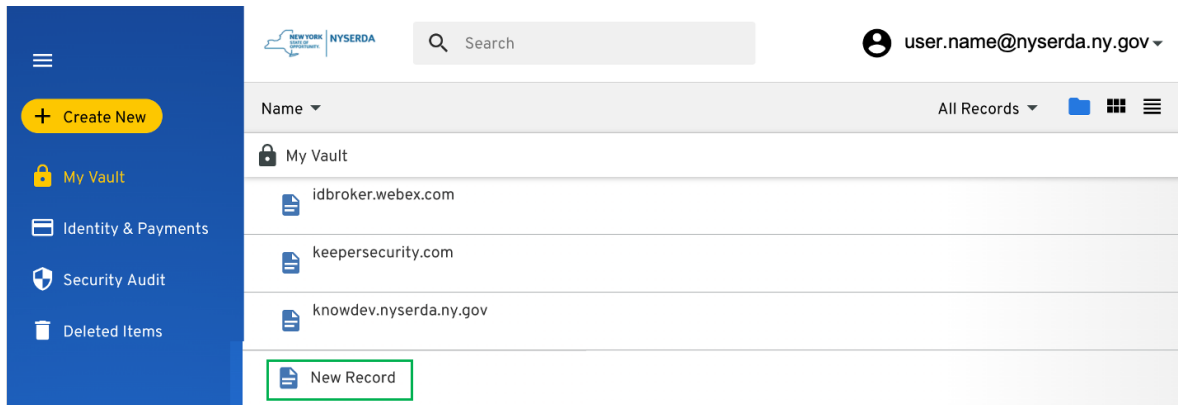
Then complete each of the following fields using the guidance below.

Field Title	Description
Title	Enter in a title for the record as you want it to appear in your Vault. Adding a unique title will make searching for records easier within Keeper Security.
Login	Add the Username associated with the Website Address.
Password	<p>Add the password associated with the Website Address. If you do not currently have a password setup for the Website Address, you can have Keeper Security generate one for you by clicking on the <b>Dice</b> icon to the right of the field. When the <b>Dice</b> icon is pressed, additional <i>generate password</i> options appear below this field to select:</p> <ul style="list-style-type: none"> <li>The password length anywhere from 8 to 50 characters long (the slide bar controls the password length)</li> <li>If the password must contain at least one capital letter (A-Z)</li> <li>If the password must contain at least one number (0-9)</li> <li>If the password must contain at least on Symbol (Sym)</li> </ul> <div> Character Length: 20 <input type="range"/> <input checked="" type="checkbox"/> A-Z <input checked="" type="checkbox"/> 0-9 <input checked="" type="checkbox"/> Sym </div>

Website Address	Copy and Paste the Website Address Login Page URL into this field. Be sure you input the Login Page URL otherwise Keeper Security will not be able to auto input your Username and Password and submit your credentials.
Custom er Field	This is an optional field. It can be used to input additional Login Field information on the Website Login Page Address. This field is only useful if the Login Page of the Website requires more than a Username and Password to access.
Files or Photos	This is an optional field. This option allows you to upload a file or photo to the Record.
Note	This is an optional field. Enter any relevant notes, if applicable, that relate to the Website Address.

3

When you have completed the form, click the **Save** button in the upper right hand corner. Your new **Record** can now be accessed from your **Vault**.



## Create New Folder

1

To create a new **Folder** in your, click the **Create New** button, then click the **Folder** option in the drop down. This will open a new window.

## New Folder

My Vault

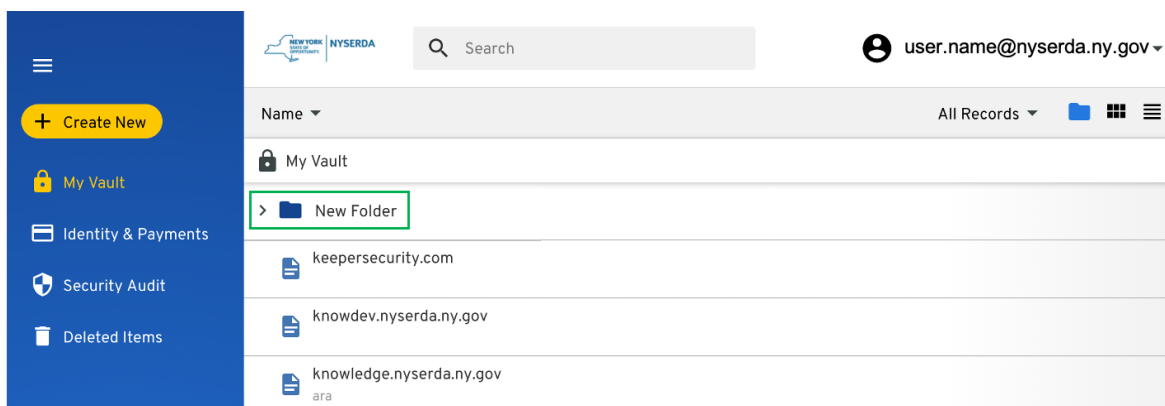
Folder Name

Cancel

Create

2

When the **New Folder** window opens, type the name in the **Folder Name** field and click **Create** . You new **Folder** will now appear at the top of your Vault, listed alphabetically with any other **Folders**.



3

To move existing **Records** to a **Folder**, either Click and drag a **Record** over the **Folder**:

**Error rendering macro 'multimedia'**

com.atlassian.rendererv2.macro.MacroException: Cannot find attachment 'AddingRecord.mov'

Or, Click on the **Folder** until the Right-Hand control pane opens and add the **Record** to the **Folder**:

Error rendering macro 'multimedia'

com.atlassian.rendererv2.macro.MacroException: Cannot find attachment 'ClickandDrag.mov'

## Create New Shared Folder

1

To create a new **Shared Folder**, click the **Create New** button, then click the **Shared Folder** option in the drop down. This will open a new window.

### New Shared Folder

My Vault

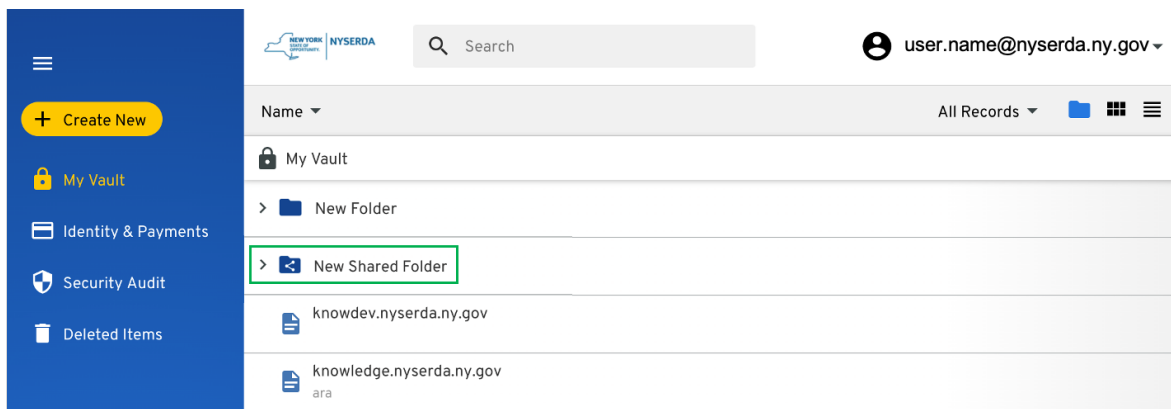
Folder Name

Cancel

Create

2

When the **New Folder** window opens, type the name in the **Folder Name** field and click **Create**. Your new **Shared Folder** will now appear at the top of your Vault, listed alphabetically with any other **Folders**.

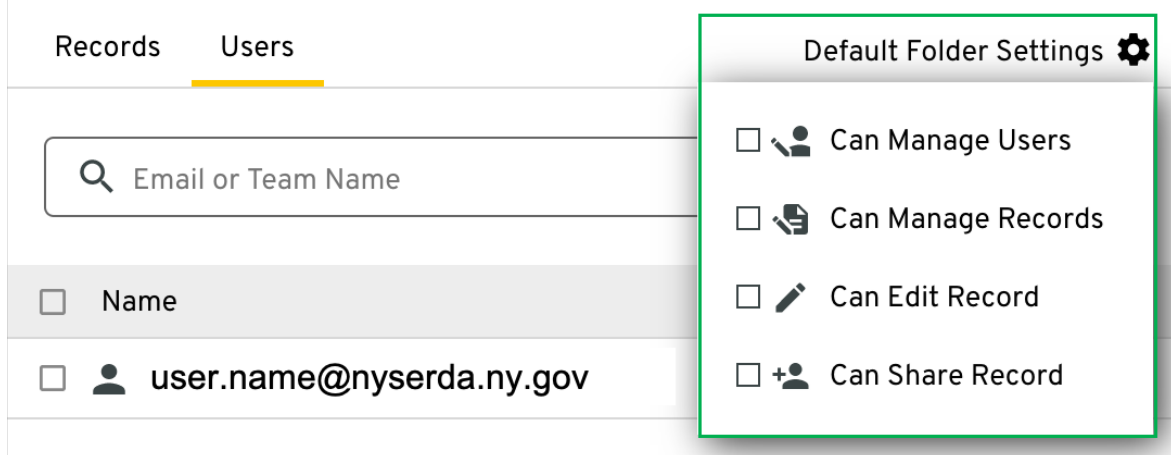


3

Add **Records** to the **SharedFolder** just as you would a **Folder** as shown in the **Create New Record** section on this page.

4

To manage the default **Permissions** for the **Shared Folder**, click on the **Shared Folder** to open the control pane, then click **Default Folder Settings** option and check the box for how you would prefer permissions to be automatically set for added Users or Teams.



5

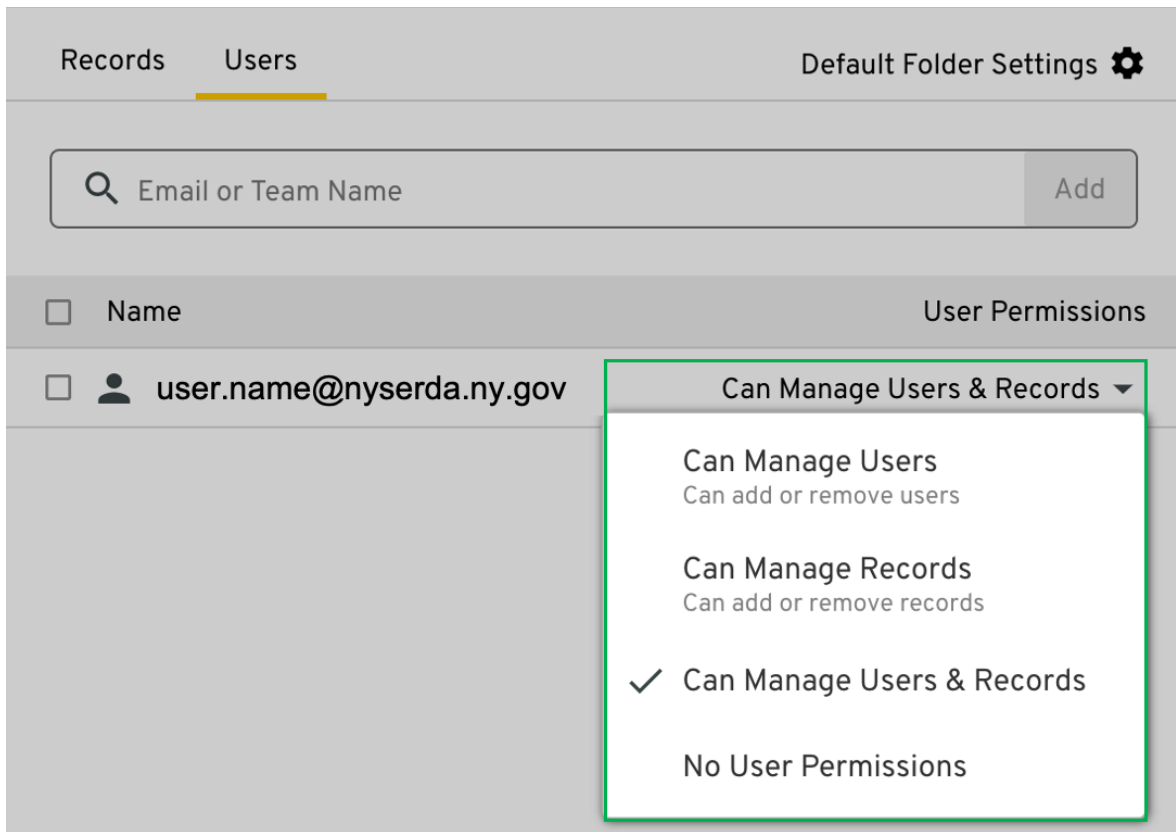
To add **Users** or **Teams** to the **Shared Folder**, click on the **Shared Folder**, click **Edit**, then click the **Users** tab and use the Email or Team Name field to add users or teams. Teams must be set up with IT before you are able to add a Team, and Users can only be added if they have an active Keeper Security license.

**Error rendering macro 'multimedia'**


com.atlassian.rendererv2.macro.MacroException: Cannot find attachment 'AddUsersTeams.mov'

6

To manage permissions for specific **Users** or **Teams** already added to the **Shared Folder**, click on the **Shared Folder**, click **Edit**, then click the **Users** tab. Locate the correct User or Team record then click the permission drop-down to the right of the User or Team name. Finally, select the option best suited for the User or Team.

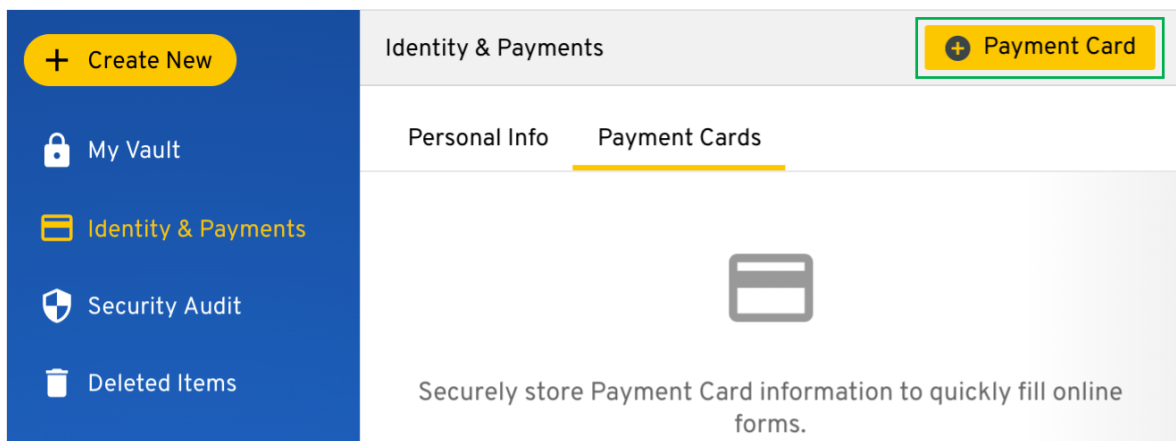


## Create New Payment Card

 Payment Card information is separate from the Vault and can be accessed by clicking the **Identity & Payments** option from the left-hand navigation pane.

1

Creating new Payment Information can be achieved either by clicking the **Create New** button and selecting **Payment Card** (as shown in the image at the top of this page) or by accessing the **Identity & Payments** option and clicking the button



2

A new window will open for you to input the details of your **Payment Card**. Complete all fields. Be sure to toggle the **Default** option if the card information you are entering should be treated as your primary online payment method.

New Payment Card

SaveCancel

Card Title

Card Title

Card Number

0000 0000 0000 0000

Expiration Month

Month▼

Expiration Year

Year▼

Security Code

000

Cardholder Name

Name on Card

Default

Billing Address

Add Billing Address▼

3

When adding an address to the Payment Card, click on the **Add Billing Address** drop-down and select the appropriate option. Addresses stored for any other Payment Card information will be accessible from this drop-down. If this is your first Payment Card, click on the **New Address** option and complete all fields.

Billing Address

Add Billing Address▼

New Address