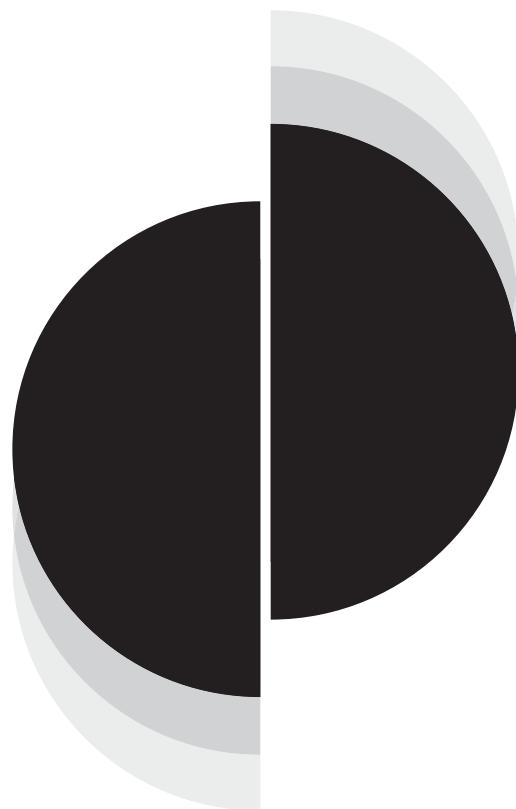


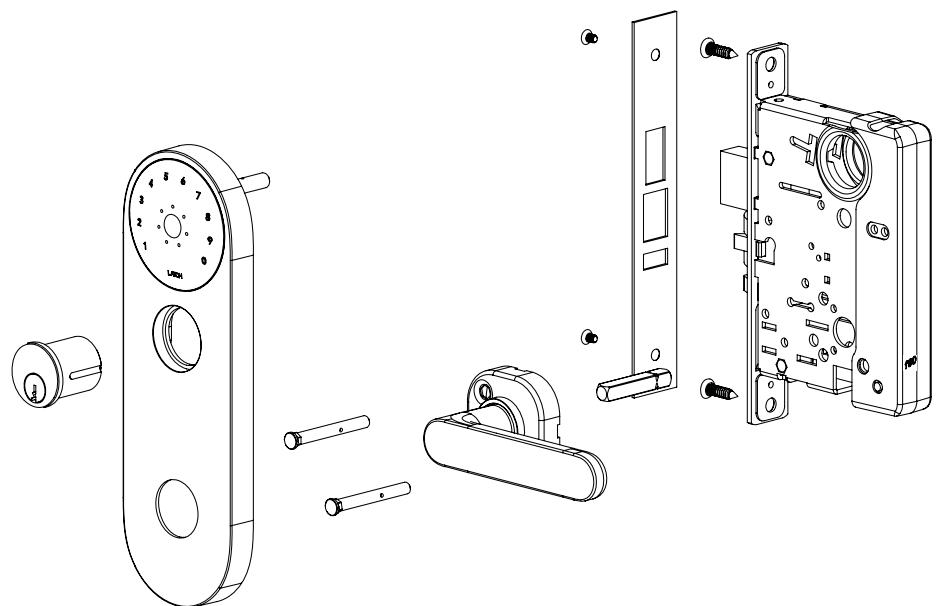
# INSTALLATION GUIDE

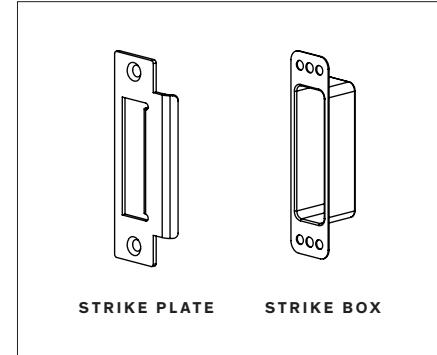
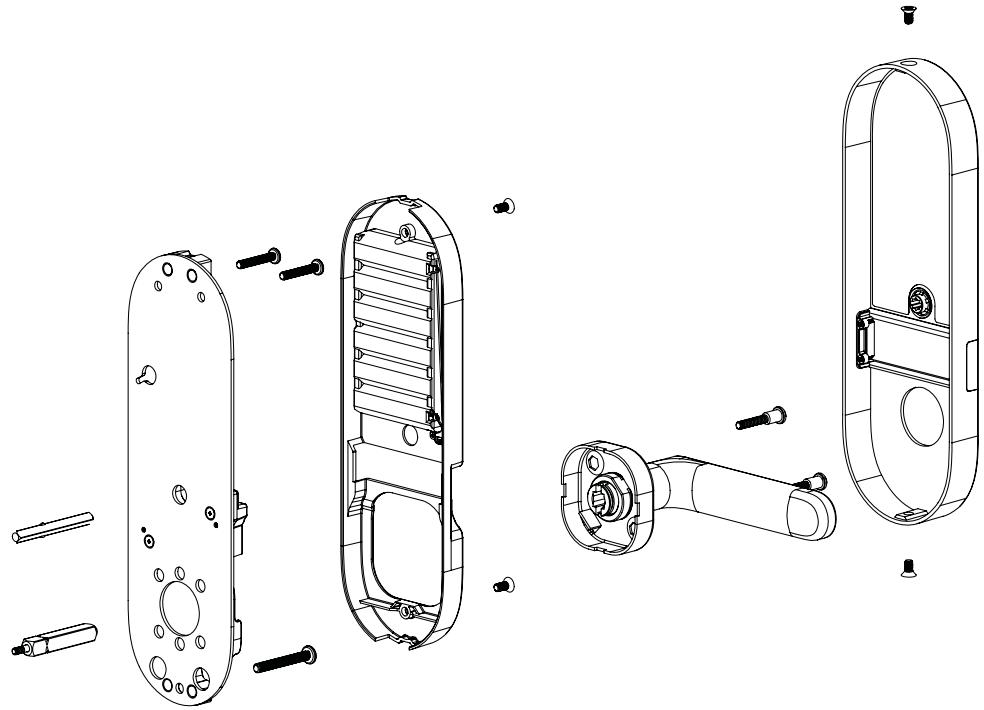


M SERIES

LATCH<sup>®</sup>

## Inside the Box

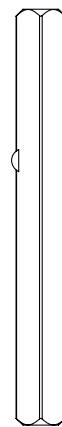




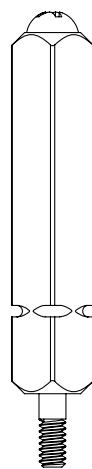
## Hardware



**X 2**



**X 1**



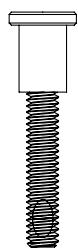
**X 1**



**X 1**



**X 1**



**X 2**



**X 2**



**X 4**



**X 2**



**X 2**



**X 2**

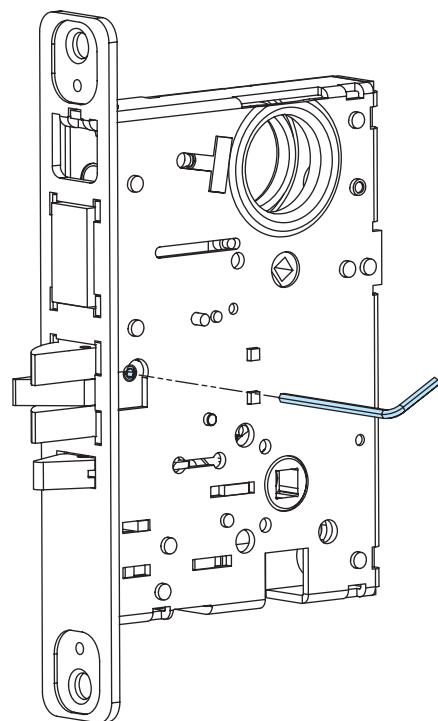


## **HANDING**

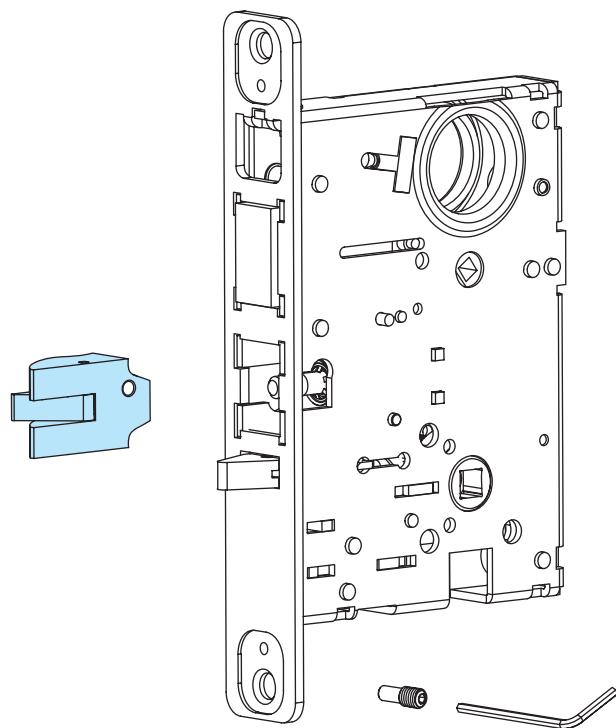
Here's how to make changes to the field reversible mortise cartridge based on your door handing and swing.

### How to change the latch-bolt position:

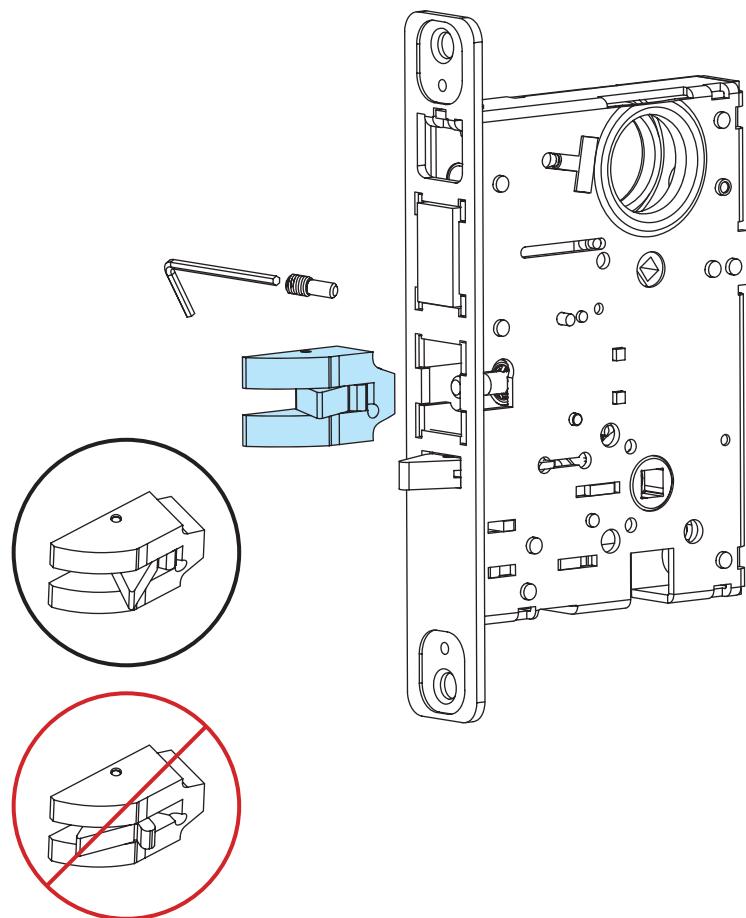
1 Remove the set screw with the Allen wrench.



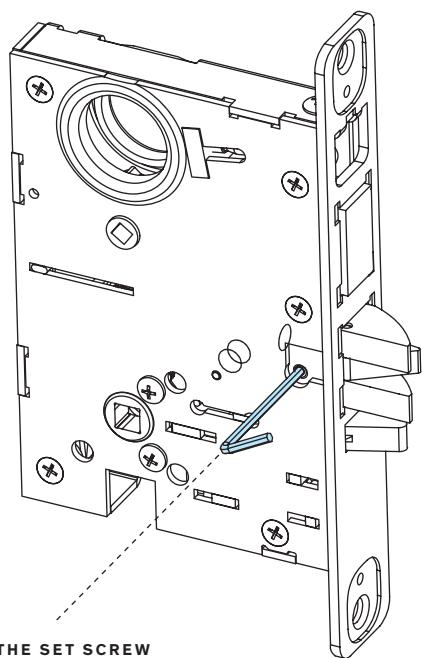
**2** Pull the latch-bolt out of the lock.



**3** Rotate the latch-bolt 180° and reinstall into the lock.  
Push the latch-bolt into the lock and then release.



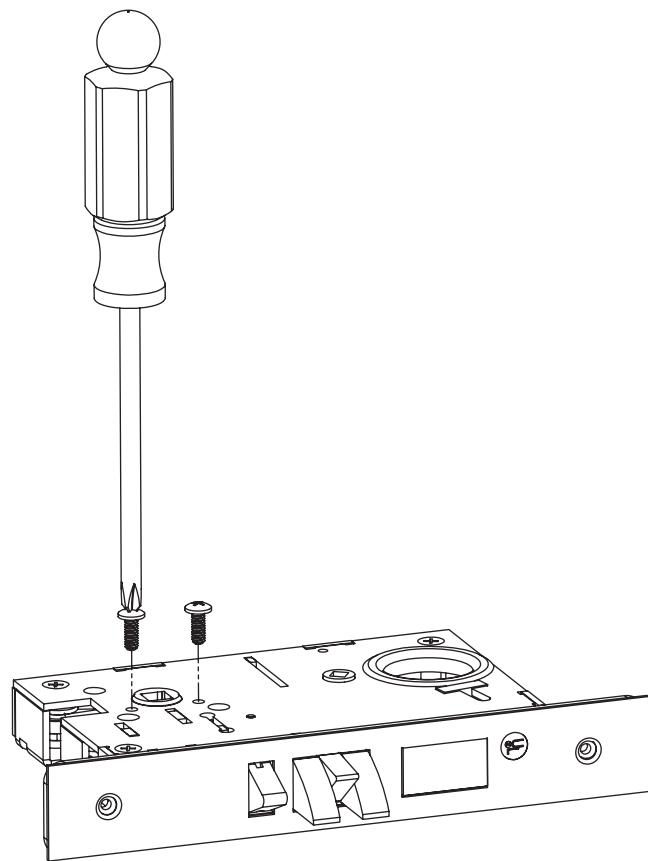
**4** Reinstall the set screw and tighten securely with the Allen wrench.



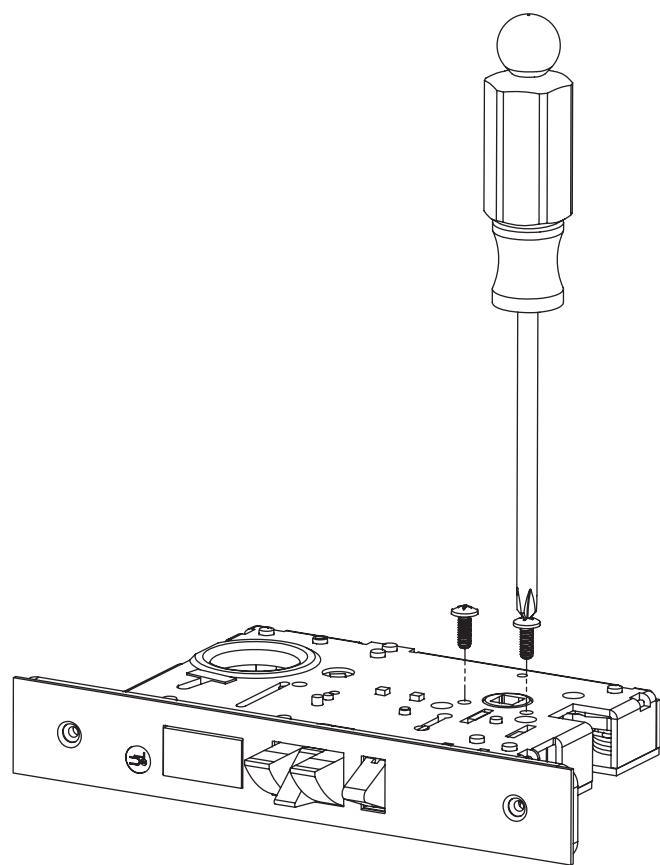
**INSERT THE SET SCREW  
FROM THE OPPOSITE SIDE**

### How to change the locking slide position:

1 Remove the two screws as shown below.



**2** Reinstall the screws on the opposite side of the mortise cartridge.



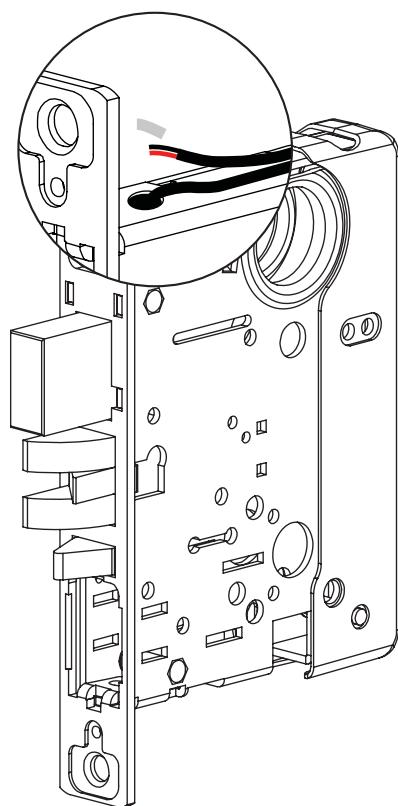
THE SCREWS SHOULD BE ON THE INTERIOR SIDE OF THE DOOR.



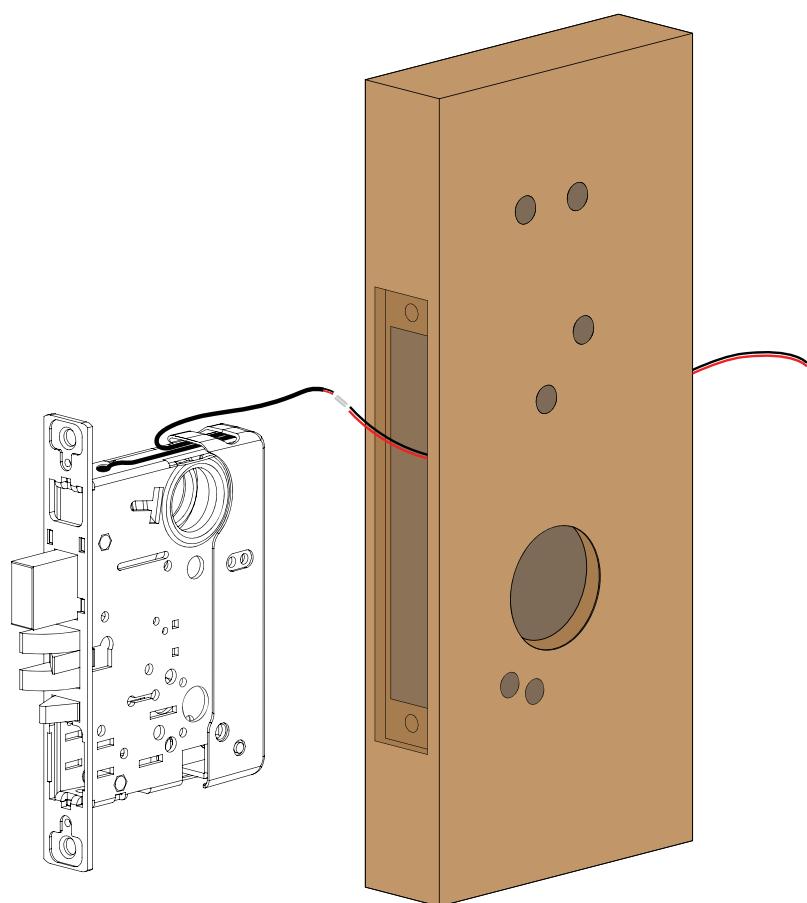
## **PERMANENT POWER WIRING**

Optional preparation for permanently powering the device.

**1** Remove cap from mortise power cable.



**2** Connect power wires (12-24VDC) to mortise power cable with dolphin connectors.

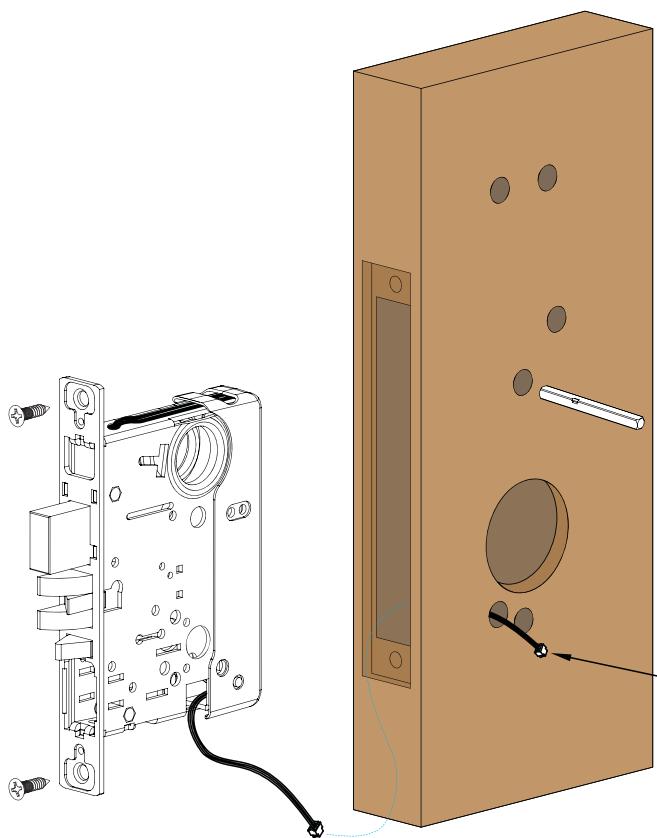




## INSTALLATION

# 1

Prepare the door according to the template provided.  
Install the mortise cartridge as shown and secure with  
two screws. Feed the cable through as shown.  
**Avoid pinching or pulling on the cable.**



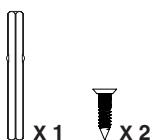
## 1.1

Place the thumb-turn spindle to  
help balance the inner mounting  
plate while assembling the  
handle in the next step.

### CABLE ROUTING

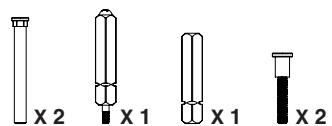
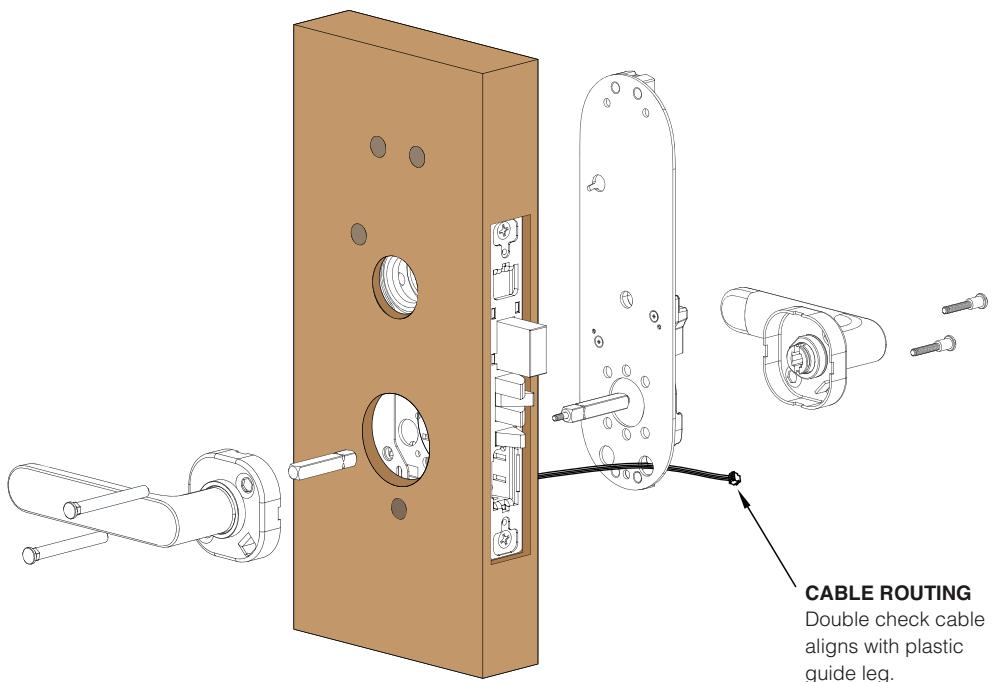
Shown for left-handed door.

**For right-handed doors,  
the mortise cable is fed  
through the hole furthest  
from the door edge.**



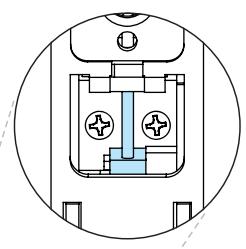
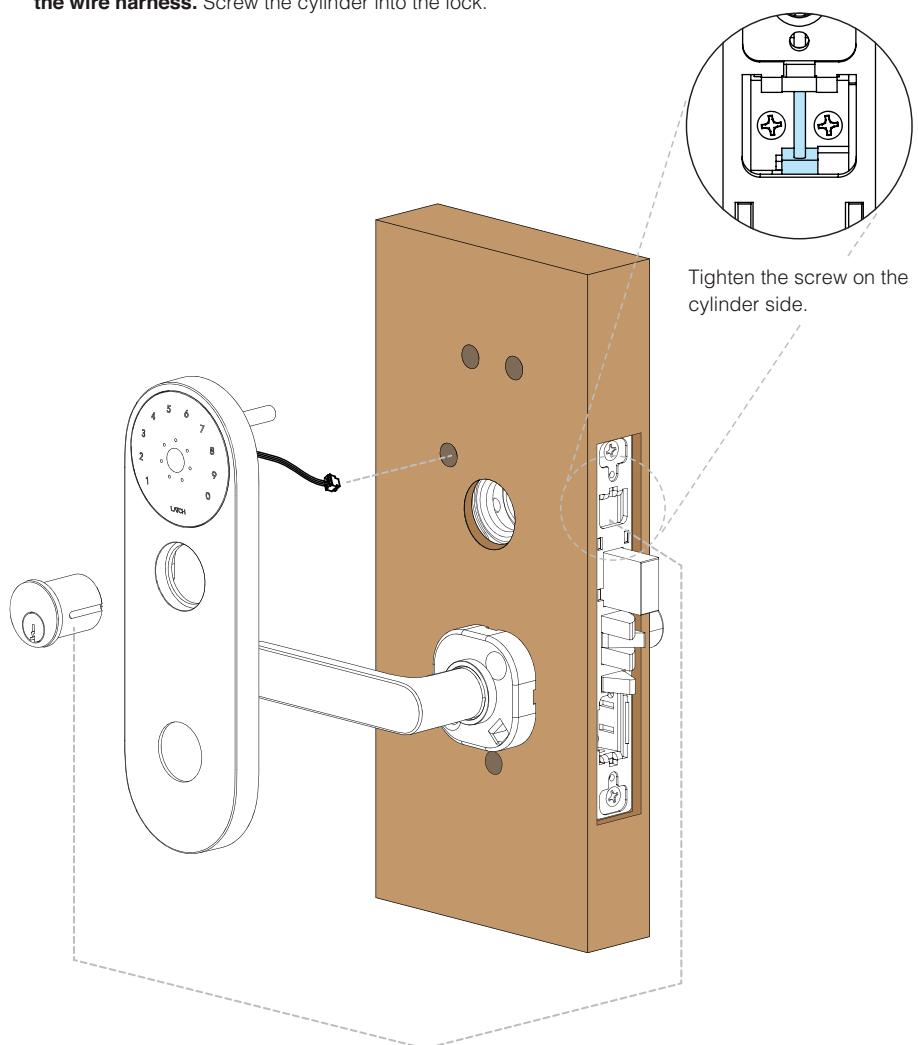
## 2

Put the outer & inner spindles (screw side) in the mortise hub and hand tighten the screw. Place the mounting plate on the inner spindle. Add the outer & inner levers. Lastly, put the posts through the outer lever trim holes and connect the lever screws through the inner lever trim holes.



### 3

Guide escutcheon onto the outer lever trim. Feed the wire harness through the door hole as shown. **Avoid pinching the wire harness.** Screw the cylinder into the lock.



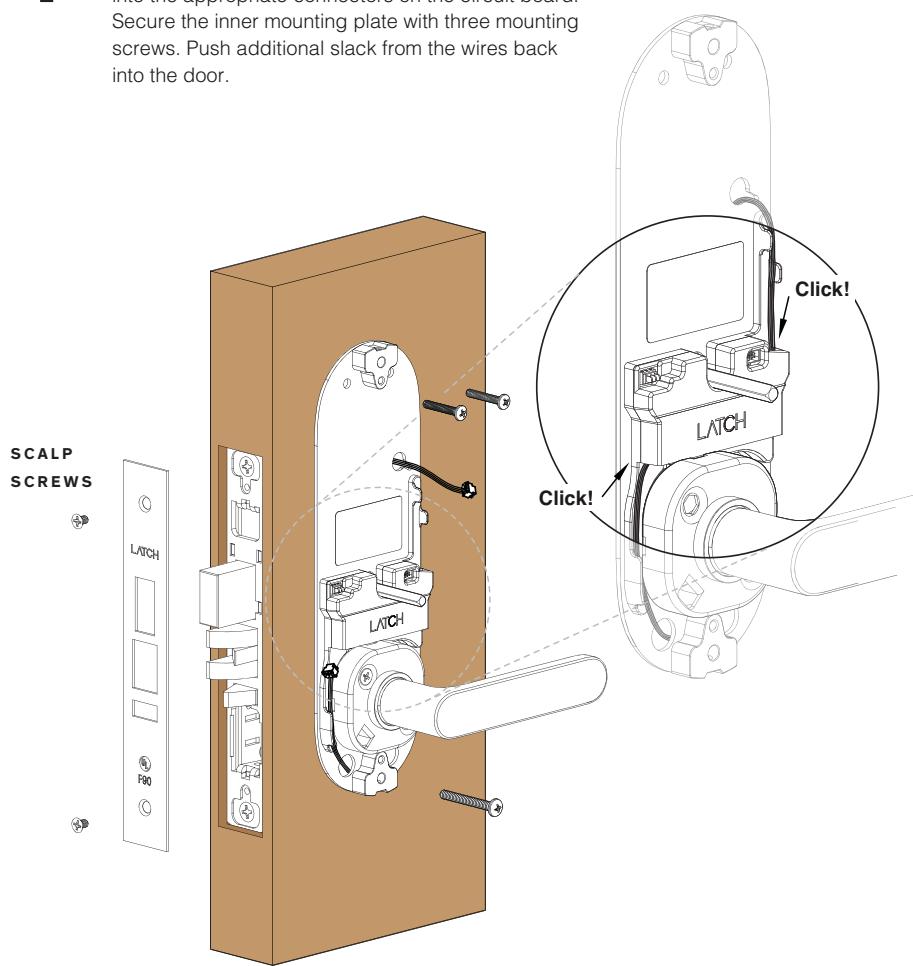
Tighten the screw on the cylinder side.

#### WARNING

AVOID DAMAGING THE SWITCH WITH THE SCREW DRIVER.

## 4

Secure the inner mounting plate. Route the wires as shown. Plug the mortise cable and the wire harness into the appropriate connectors on the circuit board. Secure the inner mounting plate with three mounting screws. Push additional slack from the wires back into the door.



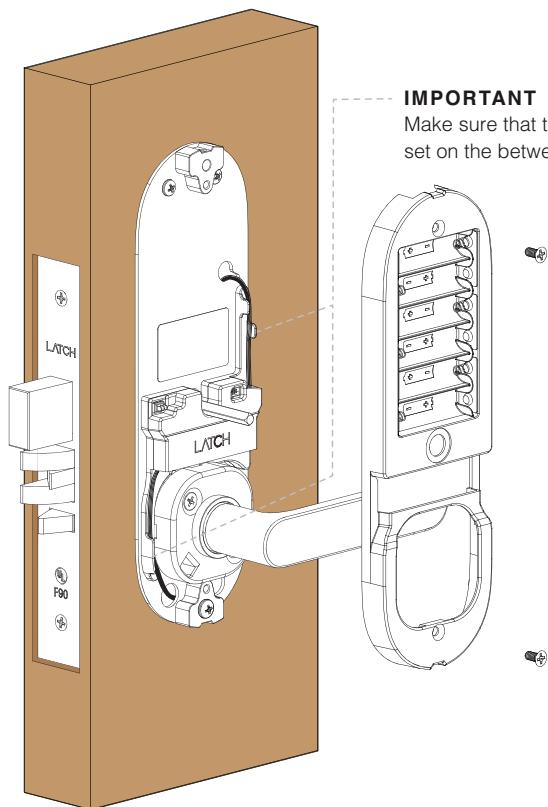
**WARNING**

OVER-TIGHTENING MAY WARP HOLLOW DOORS.

X1   X2   X2

**5**

Line up the battery plate to the inner mounting plate, secure with the two battery tray mounting screws.



**IMPORTANT**

Make sure that the cables are properly set on the between the plastic fins.

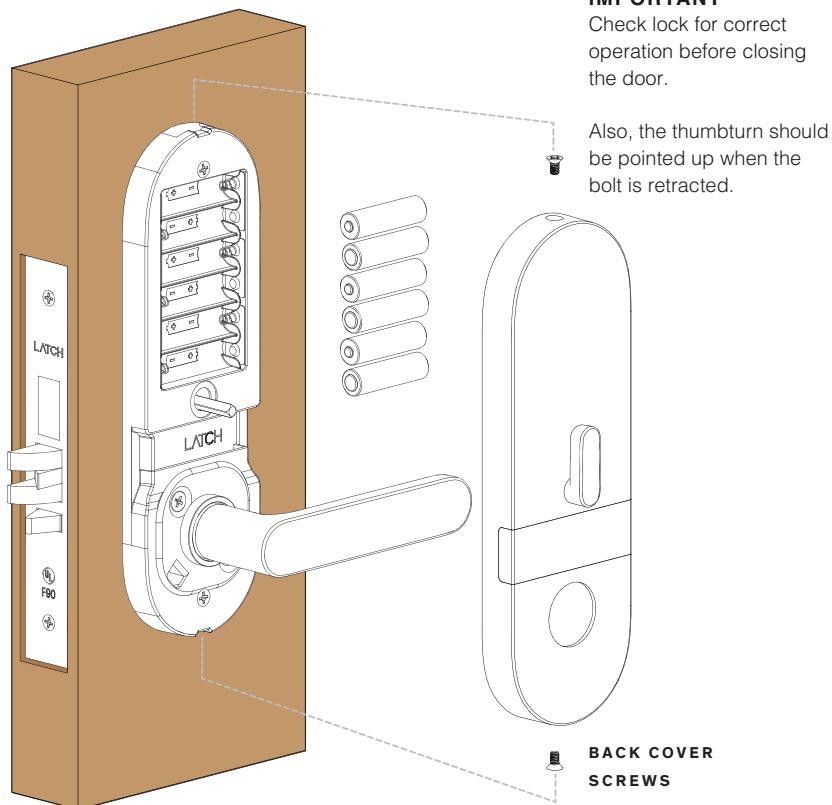
**WARNING**

AVOID PINCHING THE CABLES BETWEEN THE BATTERY TRAY AND THE MOUNTING PLATE.

 x 2

# 6

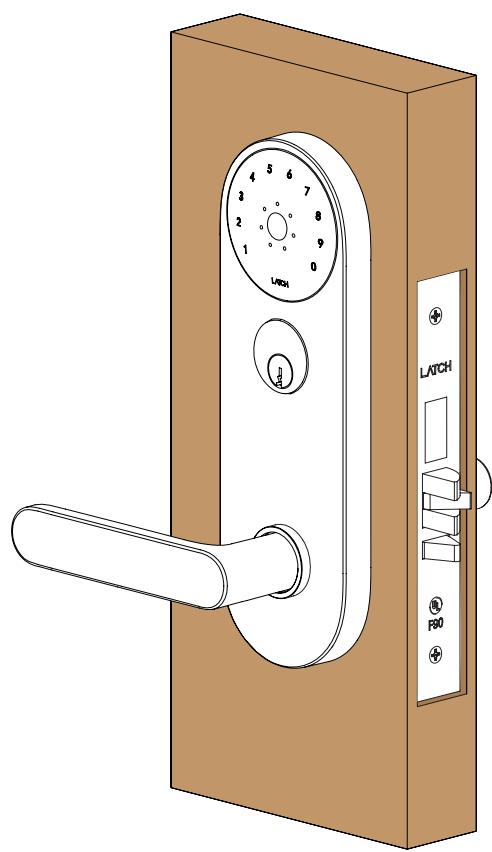
Load six AA non-rechargeable alkaline batteries. Guide the inner cover over the lever trim. Use the two mounting screws to secure the inner cover.

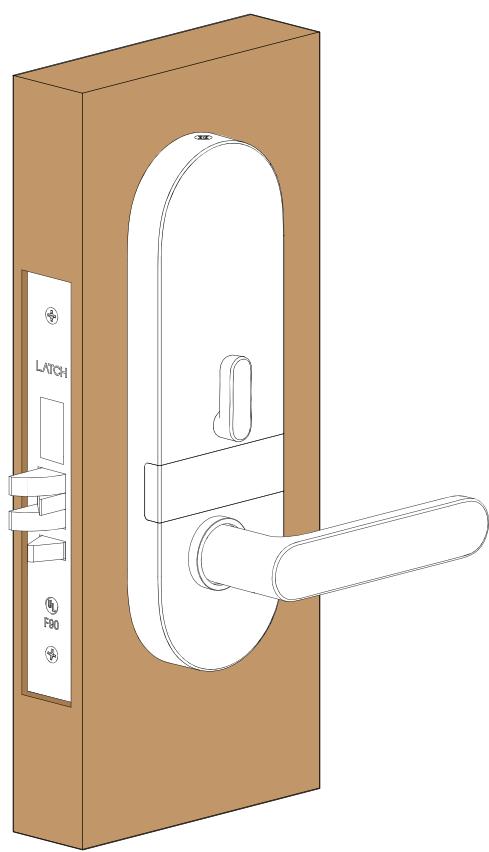


## WARNING

INCORRECT BATTERY ORIENTATION CAN CAUSE DAMAGE.  
NEVER MIX NEW AND OLD BATTERIES.

 X 2





### **Federal Communication Commission Interference Statement**

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

#### **FCC Caution:**

Any changes or modifications not expressly approved by the party responsible for compliance could void the user's authority to operate this equipment.

This transmitter must not be co-located or operating in conjunction with any other antenna or transmitter.

#### **Radiation Exposure Statement:**

This equipment complies with FCC radiation exposure limits set forth for an uncontrolled environment. This equipment should be installed and operated with minimum distance 20cm between the radiator & your body.

**Industry Canada statement:**

This device complies with ISED's licence-exempt RSSs. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

Le présent appareil est conforme aux CNR d' ISED applicables aux appareils radio exempts de licence. L'exploitation est autorisée aux deux conditions suivantes : (1) le dispositif ne doit pas produire de brouillage préjudiciable, et (2) ce dispositif doit accepter tout brouillage reçu, y compris un brouillage susceptible de provoquer un fonctionnement indésirable.

**Radiation Exposure Statement:**

This equipment complies with ISED radiation exposure limits set forth for an uncontrolled environment. This equipment should be installed and operated with minimum distance 20cm between the radiator & your body.

**Déclaration d'exposition aux radiations:**

Cet équipement est conforme aux limites d'exposition aux rayonnements ISED établies pour un environnement non contrôlé. Cet équipement doit être installé et utilisé avec un minimum de 20 cm de distance entre la source de rayonnement et votre corps.



v.1.1

[WWW.LATCH.COM](http://WWW.LATCH.COM)

# LATCH

Latch / Living with Latch / Troubleshooting & FAQs

## Ways to unlock

### Latch App

*Tip: Hold the phone close to the black Latch Lens on the lock and it will automatically find and unlock the right door. Android devices have [additional settings](#) that you can tune for the best experience.*



*Alternatively, swipe left or right to select your door and tap the ring to unlock. Ensure your phone's Bluetooth is turned on.*

## LATCH



## Doorcode

*Tip: Find your doorcodes in the left menu of the Latch App.*

# LATCH



## Using doorcodes

*Tip: Tap the center of the black Latch Lens on the lock and enter your doorcode.*

## LATCH



## Latch Keycard

*Tip: Tap the center of the black Latch Lens on the lock and present your Keycard. [Learn more](#) about getting and setting up a Latch Keycard.*



## Mechanical Key

**LATCH**

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# LATCH

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## Introduction to Latch

Latch is a smart access system of hardware and software products, which allow occupants and property managers to open, manage, and share every space from their smartphone. Read the full [Introduction to Latch](#) in Setting up Latch for your Building.

## What is Latch Manager and what does it do?



With Latch Manager, you can give and revoke access to every Latch device in your building, straight from your web browser. Within Latch Manager, you'll see People, Keys, Doors, and Activity. These sections enable you to add your building occupants, set up the correct Keys for your Doors, and monitor the individuals coming in and leaving your building.

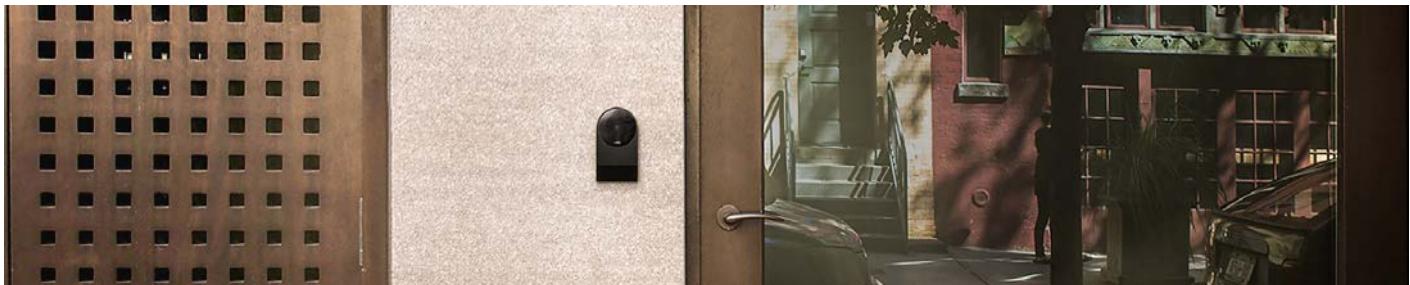
- **People:** These are the individuals you're inviting to Latch and whom you plan to give access to.
- **Keys:** If you want to give someone access to a door, you need to give them a Key. You can group one or more doors into a Key, set a schedule for when the doors can be unlocked, and whether that Key can be shared.
- **Doors:** Every Latch device for the different spaces within the building is identified in Latch Manager under Doors.
- **Activity:** Monitor who has been coming and going between your spaces and see the series of access events. Latch devices only record the access history of guests. See here for full security and privacy terms.

## Switch Latch Manager ownership



If you are new to managing your building(s), check your email to see if you have received an invite to create your Latch ID and permissions for Latch Manager as either a Portfolio Manager or Property Manager. The current Property Manager overseeing your property's Latch Manager can refer to set up other property staff as Portfolio Managers/Property Managers for more information. Once you have Latch Manager, you can add [two-factor authentication](#) to your sign in for additional account security.

## What does Managing Latch look like?



Building management with Latch is designed to be simple, while also recognizing the different individuals and spaces you'll need to give access to. To support a seamless experience, learn how to use the basics within Latch Manager - People, Keys, and Doors - which have already been introduced in “What is Latch Manager and what does it do?“.

### 1. Managing People

- People are the individuals you're inviting to Latch and whom you plan to give access to.
  - [Add, remove, and edit people in Latch Manager](#)
  - [Bulk import people with a CSV file](#)

### 2. Managing Keys

- Group one or more doors, and set a schedule for when those doors may be unlocked. You share access with people by giving them a Key or a set of Keys.
  - [Make Keys](#)

### 3. Managing Doors

- Every Latch device for the different spaces within the building is identified in Latch Manager under Doors. Create and delete doors to match your building. Door updates help you troubleshoot Latch device issues, keep your audit trail up to date, and ensure the devices have the latest feature fixes.
  - [Create a door](#)
  - [Delete a door](#)
  - [Door updates](#)
  - [Set door schedules](#)

## Maintaining a Latch Building



Maintaining your property is easy with Latch Manager. No matter where you are, you can remotely give access to trusted services and vendors such as handymen, view a history of who accessed your property and when, and keep an eye on the battery life of Latch devices, and more, all from your web browser.

Use Latch Manager for the following maintenance activities:

- [Invite guests and vendors](#)
- [Issue Keycards](#)
- [Lockouts](#)
- [Unlock issues](#)
- [If a Latch device loses power](#)

- [Activity Log](#)
- [Swap out or uninstall a Latch device](#)
- [Change batteries](#)
- [Firmware Upgrades](#)

# Introduction to Latch

Latch is a smart access platform designed around opening, managing, and sharing spaces in the fastest and most secure way. Latch devices can be installed on every door in a building, which, when coupled with the Latch App and Latch Manager, allow occupants and property managers to unlock and manage every space from their smartphone.

With Latch Manager, property managers can give and revoke access to occupants no matter where they are from a web browser. Once they give access to an occupant in Latch Manager, their occupants will receive an invitation to sign up to Latch. Once they sign up, they can use the Latch App to unlock spaces, and give their visitors such as friends, cleaning services, and more, temporary access with a Doorcode. Just like the property manager, occupants can view a photographic history of who accessed their space.

Occupants can also optionally use a Keycard to unlock their spaces if their smartphone runs out of battery, or they don't have a compatible smartphone. Keycards are normally handed out upon occupant request, by property management.

This 6-step guide can help you easily get started with Latch to manage your property remotely, share access with visitors such as vendors and services, resolve tenant lockouts remotely, and remove the inefficiencies of traditional key management.

Step 1: Send your purchase order

Step 2: Communicate Latch installation to tenants\*

Step 3: Set up your Latch Manager account

Step 4: Set up before Latch device installation

Step 5: Set up construction access

Step 6: Install Latch devices

\*If you have occupants in your building already

## Step 1: Send your purchase order and software agreement



### 1. Verify and Submit your Project Registration & Software Agreement

Latch devices are delivered per specification on the initial purchase order. If you need a master key for your construction site, please ensure it is noted on your PO. Locks are delivered per spec on PO. For appropriate handing, color, master key, etc, this must be requested on the initial PO.

All items on the Software Agreement must be filled out for a successful implementation. The Latch Onsite Admin on the Software Agreement is the individual responsible for Latch implementation.

Once we receive a Purchase Order alongside Project Registration Subscription Agreement, we will fulfill your order and provide tracking. For information on lead times please contact your rep.

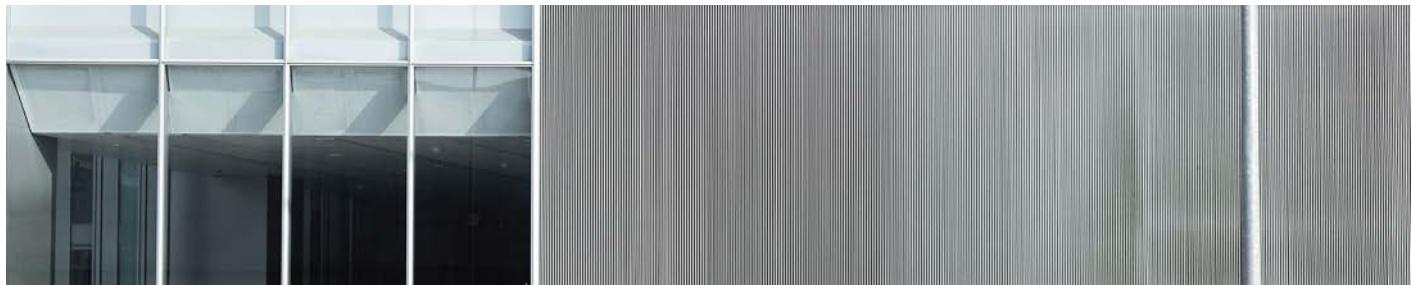
### 2. Identify the Latch Onsite Admin in your Software Agreement

The Latch On Site Admin will be made the Portfolio Manager of Latch Manager. Unlike Property Managers, Portfolio Managers can create additional Property Managers, doors, and Keys.

### 3. On the Software Agreement, identify the Latch Installer

This installer will receive specific permissions and training to successfully install Latch devices within the property.

## Step 2: Communicate Latch installation to property occupants and construction teams



If you have existing occupants in your property, take a moment to educate them on Latch:

- Latch is a full-property smart access platform that allows occupants unlock their doors with a smartphone, or Doorcode, and let family, friends, and services (e.g. dog walker, cleaner) even when they're away. If your occupants don't have a compatible smartphone or are worried about their smartphones running out of battery, they can also keep a Latch Keycard as a backup.
- Let them know which doors within the property will be fitted with Latch devices, and the when installation will occur.
- Assure them that security and privacy is at the core of Latch: Latch devices give occupants peace of mind with; a history of who accessed their space, when they did so, and if it's a guest of theirs, a photo – so they can verify the right person entered. Their comings and goings from their private spaces however are only viewable by them and the Latch will never take a photo of them when entering their space. To keep common areas safe for everyone, property managers are able to see all access history with accompanying photos for the common spaces, much like property security cameras.
- Construction teams can unlock doors using a physical master key, which needs to be part of your PO order, or with a smartphone, Keycard, or Doorcode, once they are added on Latch Manager. For guidance on adding construction teams on Latch Manager, see Step 4.

## Step 3: Set up your Latch Manager account



**Latch Manager** is a cloud-based smart access platform designed for property managers to manage who has access to which spaces in their properties. With Latch Manager, you can create doors and Keys, share access with visitors, and monitor the status of Latch devices. Learn more about “Managing Latch at your Building”.

By setting up your Latch Manager account, you will also be able to install Latch devices, and perform firmware upgrades and door updates from the Manager App.

### 1. Identify the Latch Onsite Admin

The Latch Onsite Admin is the individual given ownership of Latch Manager, as outlined in your Software Agreement.

### 2. Set up other property staff as Portfolio Managers/Property Managers

This allows more of your building staff to manage access. Property Managers can create, delete, give, and revoke access from occupants and visitors, but unlike Portfolio Managers, they cannot create other Portfolio or Property Managers, and may only have purview over select properties in the portfolio.

## Step 4: Get everything ready before installation



Whether you have existing occupants or it's a new construction project, we suggest you first set up doors and Keys for the most efficient and seamless installation. Otherwise, if you give a new occupant access, activate a new Keycard for the door, or assign the associated door to a Key after the Latch device is installed, you will need to perform a door update with the Latch Manager App.

## 1. Identify the different door types

Door types are important for ordering the doors in your app and ensuring the [correct privacy level](#) for occupants and visitors.

## 2. Create doors

To make it easier to manage your access, Latch devices need to be connected to a door. We recommend creating doors in advance so that during installation of a Latch device, installers can easily assign the correct door the Latch device.

## 3. Delete doors

Ensure only the correct doors are created and delete any duplicates.

## 4. Make Keys

Keys contain one or more doors and are what you give to occupants or visitors to enable their access to a certain space.

## 5. Add People to the Latch App

If you already have occupants, invite them prior to installing the Latch to ensure they have access immediately upon successful installation. This ensures there is no disruption in your occupant's access to their space which is a legal requirement in some territories. [You can also quickly add all your users by bulk uploading them with a csv file](#) .

## 6. Bulk Import Residents

It's more efficient for you to import all your residents in one go.

## 7. Issue Keycards

Set up Keycards for occupants or construction teams that do not wish to use the Latch app, require a backup credential, or do not have an email. [Depending on if the individual is using the Latch app, we suggest different processes when issuing their Keycard.](#)

### Step 5: Set up access for construction teams



In order to set up a Key for construction teams, you must have completed Step 4.

### 1. Create a Key for construction teams

Ensures that access can easily and quickly be revoked from construction teams upon construction completion, ensuring that their access doesn't remain once occupants move in.

## Step 6: Install Latch devices



Once you have permission to install Latch devices, you are ready to mount and activate a Latch on a door. Installers will have access to any Latch they have installed for 24 hours in order to test that the Latch correctly unlocks. Should installers need prolonged access, they will need to be given longer access through Latch Manager.

### 1. Mechanical Installation: [Latch R](#) , [Latch M](#) , [Latch C](#)

Mount the Latch device on the door.

### 2. Activate the Latch

This connects the Latch with Latch Manager which enables all digital features including smartphone, Doorcode, and Keycard unlocking, as well as access sharing and access log capture.

### 3. Prepare for Turnover

Your property management team will need to delete construction keys and teams, and prepare to manage access for occupants and visitors in time for property turnover, once construction finishes.



Latch / Installation / FAQs

## What are door types?

Door types are important for ordering the doors in your app and ensuring the correct privacy level of people in a building.

- Building Entrance: Should generally be used for entrances, vestibules, and any other passageway used to gain access from the exterior to the interior of the building
- Residence: Should be used for any doors that are direct entrances to someone's private space, apartment, or home
- Service: Should be used for any doors that lead to maintenance areas or areas that are generally closed to residents such as elevator rooms and storage closets
- Communal: Should be used for doors that lead to entertainment or community areas that are open to the majority of residents such as gyms and lounges

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# LATCH

Latch / Property Management / FAQs

## Creating doors

We recommend adding all the door names in your property in advance of installing Latch devices. This means you can add people to the door in advance so that people have access as soon as a device is installed on that door. Once you've created the door names and added all the people, you can assign that door name to a Latch device during installation. Alternatively, you can [create door names during installation using Manager App](#).

### 1. Create a door

1. Navigate to the 'Doors' tab in [Latch Manager](#)
2. Select 'Create Door'
3. Name the door
4. Select the [door type](#)
5. Select 'Create' to finish creating the door
6. You can now [add people to this door](#)

### 2. Assign the door name to a Latch device during installation

Once you have created the door, it needs to be [assigned to a Latch device during installation](#) using the Manager App. Once installation is complete, any people you have added to the door in advance will now have access.

What is a 'Not Installed' door?

# LATCH

can still continue to add people to the door.

[How to delete a door](#)

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# LATCH

# LATCH

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## Deleting a door

You can only delete a door if it hasn't been [assigned to a Latch device yet](#) and doesn't have any people added to it. If the door has already been assigned to a Latch device, you need to deactivate the Latch device first.

### How to delete a door

1. Ensure any Latch devices have been [deactivated](#) from the door
2. Remove any people who have access to the door
3. Navigate to the 'Doors' tab
4. Select the door you want to delete
5. Select 'Remove Door'

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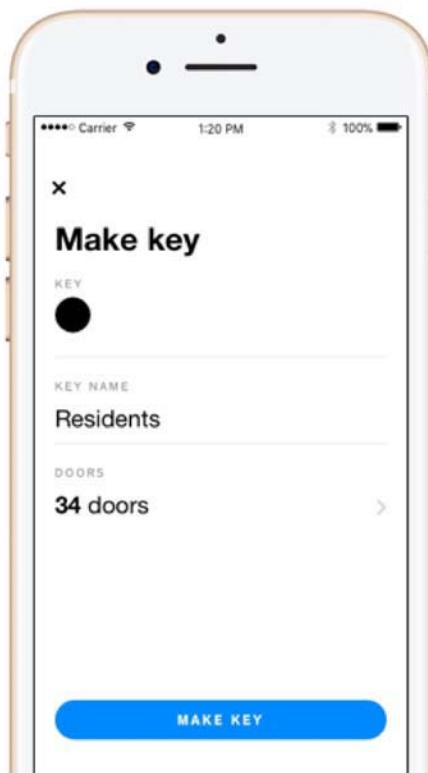
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# LATCH

Latch / Property Management / FAQs

## Making Keys

A Key is made by selecting one or more doors and the schedule they may be opened. A single Key may be given to one or more people, giving them access to all the Key's doors. You may also decide whether someone can share their Key with guests. When making access changes for a group of people, just change their Key and everyone with that Key will be updated.



**How do I give someone a new Key without changing their door codes?**

If you revoke someone's Key, their door codes for that Key's doors will be

permanently deleted. To avoid this, you must first give them the new Key with those same doors. For example, Tracy has Key A with Door 1 and Door 2. To move Tracy to Key B (also with Door 1 and Door 2), give Tracy Key B first and then revoke Key A. Their door codes will remain the same.

## Instructions

1. Add the person to the new Key
2. Remove them from the old Key

## Strategies for setting up your Keys

Managing everyone is easier when you have the fewest number of Keys.

## Considerations

- Which group of people may unlock the same set of doors during the same hours?
- Which group of people may share the same set of doors?

## Example: Keys for a residential complex

1800 Main St is a property with 200 apartments and 20 amenities with different types of people who need access:

- *Vendors* that work only during business hours, may generally only access entrances, some amenities and all service areas. They must not be able to share their key with guests.
- *Employees* that only work during business hours but must access certain show apartments and the amenities and offices. Other employees, such as the maintenance team, must be able to access all entry doors, service spaces

and amenities 24/7. Generally, employees shouldn't be able to share their key with guests.

- *Residents* that must be able to access all entry doors and their apartment 24/7, but only access amenities during certain hours. Additionally, residents may have guests but must escort them to amenities.

Keys:

- Apartment Keys for each of the 200 units, such as "Unit 205C", given to each of their respective resident leaseholders with 'May share Key' turned on.
- "Amenities" Key with all amenity doors given to residents with 'May share Key' turned off
- "Employee All Access 24/7" Key with all doors, except for occupied apartments, given to employees that need to access the entire building 24/7, with 'May share key' turned off.
- "Employee Business hours" Key with all doors, except occupied apartments, with door schedules set to 8:00 am to 6:00 pm and given with 'May share Key' turned off.
- "Residences" Key with all entry doors given to residents with 'May share Key' turned on.
- "Tour" Key with all unoccupied apartment doors, given to all employees when giving a tour with 'May share Key' turned on so they can demo functionality to prospective residents.
- "Vendors" Key with all the entrances, service spaces and amenities, each with 8:00 am to 6:00 pm door schedules and given with 'May share Key' turned off.

**Can't find what you're looking for?**

Let us know and we will get back to you as soon as possible.

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## Adding, removing, and editing people in Latch Manager

Whether it's adding or removing a resident, or editing the doors they should have access to, managing access for your building is simple, fast, and secure with Keys in [Latch Manager](#). If you don't have access to [Latch Manager](#), contact [support@latch.com](mailto:support@latch.com).

### Creating someone

Follow the steps below to add someone to your property:

1. Select the relevant property in the left menu
2. Select 'People'
3. Select 'Invite'
4. Decide whether you want to give them the Latch App or a Daycode
5. Fill out their contact details
6. Add the Keys they need. Learn more about [making Keys](#).
7. Select a start time (if you select a future start date, the person will still receive their welcome email today so they can get acquainted with the Latch App)
8. We recommend you select an expiration date for the person's access. This ensures that their access is automatically removed on the correct day, such as when their lease expires
9. At this point, the recipient will receive a welcome email with their app login details
10. Review the door update tasks on the day that the access starts. [What are door update tasks?](#)

11. Once the devices have been updated, the person will be able to access the doors by using their smartphone, doorcode, or Latch Keycard (Note: You need to independently [setup Latch Keycard](#) before using it)

## Removing someone

1. Navigate to 'People'
2. Select the person you would like to remove
3. Select 'Delete'
4. Confirm that you would like to delete the person (note: this will also remove access for their permanent guests)
5. Update the relevant doors. [What are door update tasks?](#)
6. Once the devices have been updated, the person will no longer be able to access the doors

## Editing someone's Keys

1. Navigate to 'People'
2. Add, edit the expiration, or delete their Keys
3. Review the door update tasks. [What are door update tasks?](#)
4. Once the devices have been updated, the changes will become active

## Can't find what you're looking for?

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## Importing people from a CSV file

With Import, you can upload people all at once from a CSV, just follow these steps:

1. Select 'Invite' in 'People'
2. Select 'Latch App'
3. Select 'Import CSV'
4. Select 'Import'
5. Download the CSV template to ensure your data is in the right format
6. Choose your CSV file or drag a file into the browser window
7. Select 'Import CSV'
8. Review your data, if there are any issues, you can make the changes to your original CSV file and re-upload
9. Select 'Add Contacts'
10. Add the Keys you want them to have
11. Optional: add a start time and expiration for your imported people
12. Review and Send
13. Once complete, all the people you added will receive the Latch welcome email with details on using the Latch app and Latch devices

### Good to know

- Your data must be in CSV form
- Email addresses are treated as the primary identifier people in the Latch system. If you're adding someone with an email address that already has Latch account associated with it, doors will be added to the existing account.

- If for some reason there are problems completing the import process, the same CSV may be uploaded again and the system will only import data that hasn't already been processed.

## Can't find what you're looking for?

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# LATCH

Latch / Living with Latch / Troubleshooting & FAQs

## Setting up Latch Keycard

Latch Keycard is the first physical credential to work across any door in any building you have access to. It leverages a secure process -- similar to setting up a credit card, and is easy to setup and use.

### How do I get a Latch Keycard?

Contact your property manager for your building's policy on Keycard.

### Can I have more than one Keycard?

You can only have one active keycard at any one time. However you can store as many as you want. You just need to deactivate your current keycard first, before activating another one.

### Activating

1. Go to [keycard.latch.com](https://keycard.latch.com)
2. Select 'Activate'
3. Enter the serial number printed on the Keycard
4. Enter your Latch email (that you login into the app with)
5. Open your email and press 'activate'
6. Follow the instructions to add Keycard to your doors.

## Deactivating

It's just as easy to deactivate your Latch Keycard [if you think it's lost or stolen](#).

## Can't find what you're looking for?

Let us know and we will get back to you as soon as possible.

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## Device Management

Here you can choose the properties where a Manager can see battery life and door updates, upgrade software, and install and uninstall devices.

On a Manager's contact card, you will see a section for 'Device Management'. From there, you can select 'Add Property' to add a property to their device management permissions.

When viewing this property, you will see at a glance the number of total devices within the property that you are giving the Manager permissions to.

Upgrade software, view battery life, and perform door updates permissions come automatically when you add the manager to the property. Install and Uninstall Devices permission is the only setting that can be toggled ON or OFF.

Remember, to uninstall a device, a Manager must be given key access for that device.

## Key Management

Here you can choose the level of Key management permissions a Manager will have.

On a Manager's contact card you will see a section for 'Key Management'. From there, you can select 'Add Property' to add a property to that Manager's permissions. When viewing this property, you will see at a glance the number of total keys within the property.

## Permission Levels

You will then need to select the level of key management permission you would like to assign to the Manager:

### Full Key Management

Managers can create, edit, delete, give, and revoke all existing and future Keys. This is the default permission level for all Portfolio Managers. This is the only permission level

that allows for creating, editing, and deleting Keys. This permission also allows the Manager to view access logs.

## Limited Key Management

Managers can only give and revoke existing and future keys. No creating, editing, or deleting permissions. This permission also allows the Manager to view access logs.

## Specific Key Management

Managers can only give and revoke specific Keys designated to the Manager. If Specific permission is selected, you will then be prompted to select the specific keys within a given property that the manager can give and revoke. This permission also allows the Manager to view access logs only for those specifically selected doors.

Note: Remember that Key management is not the same thing as Key access. If you would like to give Key access to a Manager, you will need to 'Add a Key' to that Manager.

## Access Logs

You can only see the access logs for doors that are in the Keys that you manage. For example, if none of the Keys that you manage have 'Door 1', then you won't be able to view access logs for 'Door 1'.

## Deliveries Key

You may also see a 'Deliveries' Key within your portfolio. If you have this Key, your Portfolio Manager has opted in for automated deliveries with UPS and other national carriers. This Key allows those logistics partners to seamlessly deliver packages into your property. The Deliveries Key is managed by Latch and cannot be edited or deleted by anyone, including Portfolio Managers.

# Creating and Deleting Portfolio Managers and Property Managers

## *What is a Portfolio Manager?*

A Portfolio Manager may create and delete Property Managers, and they may create and delete other Portfolio Managers. A Portfolio Manager may also create, edit, delete, give, and revoke access. A Portfolio Manager can see all of the properties and all of the Portfolio Managers and Property Managers within a given portfolio.

## *What is a Property Manager?*

A Property Manager may have access management permissions such as the ability to create, edit, and delete access, in addition to making, giving, and revoking access, but unlike Portfolio Managers they cannot create and delete other managers. A Property Manager can see all of the properties for which they are a Property Manager in any given portfolio.

## *How to Create A Manager*

To create a Portfolio Manager or Property Manager from directly within Latch Manager, navigate to the top right-hand side of the home page and select the ‘Manage Portfolio’ menu.

From the ‘Manage Portfolio’ menu, you may select either the ‘Portfolio Managers’ or ‘Property Managers’ list. From there, you may select ‘Create New’ to create a contact card for your new Portfolio Manager or Property Manager. Simply enter the person's First Name, Last Name, and Email Address, and select ‘Create’.

## *How to Delete A Manager*

To delete a Manager from a portfolio, select the contact card you want to delete and scroll to the bottom. Select ‘Delete’.

Some things to keep in mind about Portfolio and Property Manager contact cards at this time:

- Portfolio Managers cannot edit contact card profile information, such as First Name, Last Name, and Email Address, at this time. If you try to delete the contact card and

re-create a new contact card using the same email address, then the old First Name and Last Name will still persist. If you would like to edit contact card profile information, you will need to contact Latch Customer Support to do so.

- Portfolio Managers can delete themselves from a portfolio so long as they are not the last remaining Portfolio Manager.
- The last remaining Portfolio Manager cannot be deleted. This is to ensure Latch always has at least one point of contact for a portfolio.

## Creating doors

We recommend adding all the door names in your property in advance of installing Latch devices. This means you can add people to the door in advance so that people have access as soon as a device is installed on that door. Once you've created the door names and added all the people, you can assign that door name to a Latch device during installation. Alternatively, you can [create door names during installation using Manager App](#).

### 1. Create a door

1. Navigate to the 'Doors' tab in [Latch Manager](#)
2. Select 'Create Door'
3. Name the door
4. Select the [door type](#)
5. Select 'Create' to finish creating the door
6. You can now [add people to this door](#)

### 2. Assign the door name to a Latch device during installation

Once you have created the door, it needs to be [assigned to a Latch device during installation](#) using the Manager App. Once installation is complete, any people you have added to the door in advance will now have access.

## What is a 'Not Installed' door?

Once you have created a door, it needs to be assigned to a Latch device. This occurs during installation of the Latch device. Until then, the door will remain 'uninstalled'. You can still continue to add people to the door.

### How to delete a door

## Deleting a door

You can only delete a door if it hasn't been [assigned to a Latch device yet](#) and doesn't have any people added to it. If the door has already been assigned to a Latch device, you need to deactivate the Latch device first.

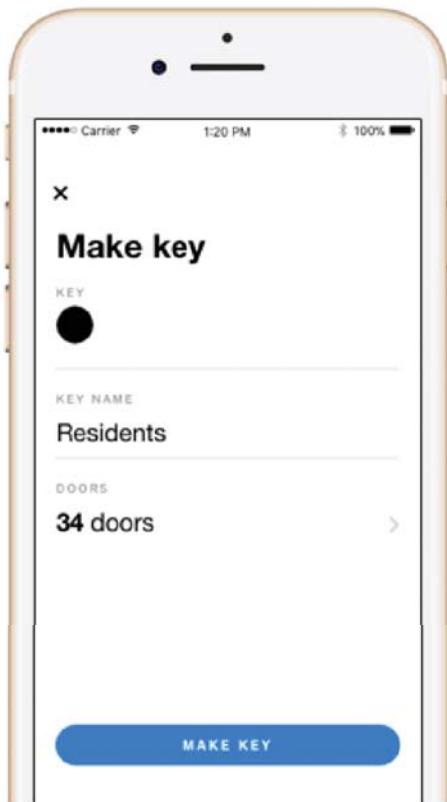
### How to delete a door

1. Ensure any Latch devices have been [deactivated](#) from the door
2. Remove any people who have access to the door
3. Navigate to the 'Doors' tab
4. Select the door you want to delete
5. Select 'Remove Door'

## Making Keys

A Key is made by selecting one or more doors and the schedule they may be opened. A single Key may be given to one or more people, giving them access to all the Key's doors. You may also decide whether someone can share their Key with guests. When

making access changes for a group of people, just change their Key and everyone with that Key will be updated.



## How do I give someone a new Key without changing their door codes?

If you revoke someone's Key, their door codes for that Key's doors will be permanently deleted. To avoid this, you must first give them the new Key with those same doors. For example, Tracy has Key A with Door 1 and Door 2. To move Tracy to Key B (also with Door 1 and Door 2), give Tracy Key B first and then revoke Key A. Their door codes will remain the same.

### Instructions

1. Add the person to the new Key
2. Remove them from the old Key

## Strategies for setting up your Keys

## Managing everyone is easier when you have the fewest number of Keys.

### Considerations

- Which group of people may unlock the same set of doors during the same hours?
- Which group of people may share the same set of doors?

### Example: Keys for a residential complex

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- *Residents* that must be able to access all entry doors and their apartment 24/7, but only access amenities during certain hours. Additionally, residents may have guests but must escort them to amenities.

### Keys:

- Apartment Keys for each of the 200 units, such as "Unit 205C", given to each of their respective resident leaseholders with 'May share Key' turned on.
- "Amenities" Key with all amenity doors given to residents with 'May share Key' turned off
- "Employee All Access 24/7" Key with all doors, except for occupied apartments, given to employees that need to access the entire building 24/7, with 'May share key' turned off.

- "Employee Business hours" Key with all doors, except occupied apartments, with door schedules set to 8:00 am to 6:00 pm and given with 'May share Key' turned off.
- "Residences" Key with all entry doors given to residents with 'May share Key' turned on.
- "Tour" Key with all unoccupied apartment doors, given to all employees when giving a tour with 'May share Key' turned on so they can demo functionality to prospective residents.
- "Vendors" Key with all the entrances, service spaces and amenities, each with 8:00 am to 6:00 pm door schedules and given with 'May share Key' turned off.

## Adding, removing, and editing people in Latch Manager

Whether it's adding or removing a resident, or editing the doors they should have access to, managing access for your building is simple, fast, and secure with Keys in [Latch Manager](#). If you don't have access to [Latch Manager](#), contact [support@latch.com](mailto:support@latch.com).

### Creating someone

Follow the steps below to add someone to your property:

1. Select the relevant property in the left menu
2. Select 'People'
3. Select 'Invite'
4. Decide whether you want to give them the Latch App or a Daycode
5. Fill out their contact details
6. Add the Keys they need. Learn more about [making Keys](#).
7. Select a start time (if you select a future start date, the person will still receive their welcome email today so they can get acquainted with the Latch App)
8. We recommend you select an expiration date for the person's access. This ensures that their access is automatically removed on the correct day, such as when their lease expires
9. At this point, the recipient will receive a welcome email with their app login details

10. Review the door update tasks on the day that the access starts. [What are door update tasks?](#)
11. Once the devices have been updated, the person will be able to access the doors by using their smartphone, doorcode, or Latch Keycard (Note: You need to independently [setup Latch Keycard](#) before using it)

## Removing someone

1. Navigate to 'People'
2. Select the person you would like to remove
3. Select 'Delete'
4. Confirm that you would like to delete the person (note: this will also remove access for their permanent guests)
5. Update the relevant doors. [What are door update tasks?](#)
6. Once the devices have been updated, the person will no longer be able to access the doors

## Editing someone's Keys

1. Navigate to 'People'
2. Add, edit the expiration, or delete their Keys
3. Review the door update tasks. [What are door update tasks?](#)
4. Once the devices have been updated, the changes will become active

## Schedules

When [making a Key](#), you can set doors in that Key to be available on certain days at certain hours for anyone that you give that Key to. In one step, everyone gets the same schedule for the same doors.

## Adding a schedule to a new Key

1. [Make a Key](#)
2. When selecting doors, select the days and time that you want that door to be openable
3. [Update the relevant doors](#) if necessary

## Editing a schedule

To change a schedule:

1. Select the Key in the 'Keys' menu
2. Select 'Doors'
3. Edit the schedule for the relevant doors

## I can't set a schedule for a door

If Schedules isn't available for a door, you may need to upgrade the firmware on the Latch. Contact [support@latch.com](mailto:support@latch.com) for guidance.

## Door updates

Doors without an internet connection require an update whenever you:

1. Revoke someone's access
2. Activate a Keycard

Doors are automatically updated whenever someone unlocks a door for the first time with the app (during the “setting up” process). You may also intervene and update the doors yourself with the Latch apps:

- Latch App: [How to update your doors](#)
- Latch Manager App ([iOS](#)): Go to 'tasks' and then choose the door you wish to update.

## Importing people from a CSV file

With Import, you can upload people all at once from a CSV, just follow these steps:

1. Select 'Invite' in 'People'
2. Select 'Latch App'
3. Select 'Import CSV'
4. Select 'Import'
5. Download the CSV template to ensure your data is in the right format
6. Choose your CSV file or drag a file into the browser window
7. Select 'Import CSV'
8. Review your data, if there are any issues, you can make the changes to your original CSV file and re-upload
9. Select 'Add Contacts'
10. Add the Keys you want them to have
11. Optional: add a start time and expiration for your imported people
12. Review and Send
13. Once complete, all the people you added will receive the Latch welcome email with details on using the Latch app and Latch devices

### Good to know

- Your data must be in CSV form
- Email addresses are treated as the primary identifier people in the Latch system. If you're adding someone with an email address that already has Latch account associated with it, doors will be added to the existing account.
- If for some reason there are problems completing the import process, the same CSV may be uploaded again and the system will only import data that hasn't already been processed.

## What is the best way to issue keycards?

Latch Keycards work securely across all the doors someone can open and are unique only to them. Therefore, activating and deactivating them is similar to a credit card.

## Someone who will use the Latch app

1. Create their access in Latch Manager.
2. Give them their Latch keycard. The card will prompt them to [activate their keycard online](#). After activating they must open any non-internet connected doors with the Latch app before their keycard will work.

Please note: Their keycard must be activated before they open doors with the Latch app for the first time. If they've already used the Latch app to open their doors, they will be shown how to [manually update](#) their doors with the app.

## Someone who will not use the Latch app

1. Create their access in Latch Manager.
2. Give them their Latch keycard. The card will prompt them to [activate their keycard online](#). After activating, they will be instructed to notify their property's management to update their doors.
3. [Update](#) any of their non-internet connected doors using the Latch Manager app (iOS). Their keycard will not open these doors until updated.

## Finding out if your residents have activated a Keycard or have the Latch app

With [Latch Manager](#) you can see if a resident has successfully logged into the app or [activated a keycard](#), so you can rest assured they can get into the property. See [Getting Started](#) for more information on getting access to Latch Manager.

To see if a resident has logged into the app or activated a keycard follow these steps:

1. Open Latch Manager
2. Select 'People'
3. Select the user who's credentials you want to check
4. Select 'Credentials'

## How do I give Keycards to my residents?

[Learn more.](#)

## Can I let guests and vendors in remotely with Latch Manager?

Yes. Latch Manager let's you send a Daycode to guests or vendors immediately for today, no matter where you are.

### With Latch Manager

1. Select 'Invite'
2. Select 'Day code'
3. Enter the guest's contact details (note, you can only send a doorcode via email with Latch Manager. If you'd like to send a doorcode via text, use the Latch app)
4. Select the Keys they need (they will receive a unique code for each door)
5. Select whether you want codes to start today or tomorrow
6. Choose if you want each code to self-destruct 15 minutes after they are first used
7. Send
8. Your guest will now receive an email with the doorcodes

### With the Latch app

See [how to let guests in](#).

## Lockouts

Say goodbye to lengthy and expensive lockouts. [Doorcodes](#) are 7 digit codes that you can remember in the event that you're locked out. If someone forgets their doorcodes, grant them a temporary guest day code to get back in.

[Learn more about creating temporary guests.](#)

## If a Latch device loses power

### Latch M and Latch C

#### Property power outages

Latch M and Latch C are both battery powered and will work as normal in the event of a property-wide power outage. Learn more about [battery power](#).

#### Loss of power

If the Latch M or Latch C lose power, during battery replacement for example, it is important that they are immediately [updated](#). Failing to update the device after power loss may cause disruption to guest access.

### Latch R

#### Property power outages and loss of power

Latch R requires a constant power connection in order to work. In the event of power loss, due to a property-wide outage for example, it is important that it is immediately [updated](#) once power resumes. Failing to update the device after power loss may cause disruption to guest access and [Schedules](#).

#### Fail-safe and fail-secure

It is important that the R is correctly wired and [programmed](#) in order to fail-safe (stay unlocked) or fail-secure (stay locked) in the event of power loss. Please consult your property installer for guidance.

## Issues with unlocking

To troubleshoot an unlock issue, try the following.

### Latch App

Check the following first:

1. Ensure you're on the latest version of the app
2. Device Bluetooth is turned on
3. You are near the Latch device that you wish to unlock
4. The correct Latch device has been selected
5. You are unlocking a door within your designated schedule. Troubleshoot issues with schedules [here](#).

If issues persist try the following:

1. Turn Airplane mode on and off.
2. Try your doorcode [Where do I find my doorcode?](#)
3. [Update the Latch device](#) with the Latch App or Latch Manager App:

### Latch Keycard and doorcodes

If doorcodes or Latch Keycard are not working it could be that the Latch Device is not [up-to-date](#).

If unlocking issues persist, please contact [support@latch.com](mailto:support@latch.com).

## Password Set & Reset Procedure

## *Latch App:*

Resetting Password (If you are unable to log in) :

1. Open the [Latch App](#)
2. At the bottom of the Log In screen, select 'I Forgot My Password'
3. Enter the email registered with your Latch Account
4. This will send a message including a temporary password to your Latch registered email
5. Return to the Latch App
6. Copy or enter this password into the password field (*Note: the password is case sensitive*)
7. If unable to log in, please repeat this process
8. Once logged in, you can change your password provided by Latch by following the Set Password procedure under 'My Profile' and selecting 'Edit'

Setting a New Password

1. Open the [Latch App](#)
2. Select the 'Settings' Menu in the upper left
3. Select 'My Profile'
4. In the password field under 'My Account', select 'Edit'
5. Enter your current password (*if you've recently reset your password, this will be the temporary password provided by Latch*)
6. Enter your new password. (*Please ensure your password is at least 8 characters long, but no more than 1024 characters*)
7. Select 'Done'
8. You should then receive a confirmation message to your Latch registered email that your password has been reset

If you run into issues while resetting your password, or while attempting to log in, please reach out to our Support Team at [support@latch.com](mailto:support@latch.com)

## *Latch Manager App / Latch Manager Web Tool:*

Resetting and setting your password for both the Manager App and the Latch Manager Web tool follow the same process. If resetting or changing your password for either the Manager App, or the Latch Manager Web Tool, please follow the directions below.

Resetting Password (If you are unable to log in) :

1. Open the [Latch Manager Web Tool](#)
2. At the bottom of the Log In screen, select 'Forgot Your Password?'
3. Enter the email registered with your Latch Manager Account
4. This will send a message including a password reset link to your Latch registered email
5. Open Email
6. Click the 'Reset Password' Link
7. Enter your new password . *(Please ensure your password is at least 8 characters long, but no more than 1024 characters )*
8. Select 'Continue'
9. You should then receive a success prompt
10. Select 'Great'
11. You'll then be redirected back to the [Latch Manager Web Tool](#), where you should now be able to log in using your newly created password. You should now also be able to log in to the [Latch Manager App](#) using this same password

Setting a new Password

1. Log in to the [Latch Manager Web Tool](#)
2. Select your name in the upper right
3. Select 'My Account'
4. Select 'Change Password' under the 'Password' section
5. Enter your current password
6. Enter your new password
7. Select 'Change Password'
8. You should then receive a confirmation message to your Latch Manager registered email that your password has been reset
9. You should now be able to log in to both the [Latch Manager Web Tool](#) and the [Latch Manager App](#) using the new password

If you run into issues while resetting your password, or while attempting to log in, please reach out to our Support Team at [support@latch.com](mailto:support@latch.com)

## Changing batteries

The Latch M's 6 AA batteries should last 12 months under normal usage using 6 x AA Duracell non-rechargeable batteries. Managing them is simple. Just follow these steps.

### Reading battery life

View device battery life using the [Latch Manager](#) or Manager App.

Battery life is refreshed every time a device is [updated](#). If a device hasn't been updated for a while, the reported battery life could be out-of-date. If a battery hasn't been read for more than a month, it'll be reported as 'unknown', and you'll need to update the device to get a reading.

### What batteries do I buy?

- 6 x AA non-rechargeable alkaline batteries
- **Never mix old and new batteries. If you're replacing batteries, replace ALL the batteries with new ones of the same brand. Mixing can cause battery failure.**

## Changing batteries

1. Remove the Latch M's back cover
2. Replace the 6 AA batteries with AA non-rechargeable alkaline batteries
3. Important: Replace ALL 6 AA batteries with new batteries of the same brand. Mixing and matching new and old batteries can cause battery failure and reduced battery life

4. Update the device (Important: failing to update the device after battery replacement can result in unreliable functionality). [How do I update a device?](#)

## Turning on Two-Factor Authentication for Latch Manager

Two-Factor Authentication ensures that you're the only person who can access your account, even if someone knows your email and password. If you're a Portfolio Manager, you can also enforce Two-Factor Authentication for all Portfolio and Property Managers of your Portfolio to ensure everyone is protected.

### Turning on Two-Factor Authentication for yourself

1. Navigate to your name in the top right corner of [Latch Manager](#)
2. Tap 'My Account'
3. Tap 'Set Up' under 'Two-Factor Authentication'
4. Enter the phone number to which you'd like us to send your authentication codes
5. Enter the authentication code sent to your phone number

### Turning on Two-Factor Authentication for your Portfolio

1. First set up Two-Factor Authentication for yourself
2. Navigate to 'My Account'
3. Tap 'Security Settings' under 'Two-Factor Authentication'
4. Turn on Two Factor Authentication for your Portfolio at the bottom of the page

## Turning off Two-Factor Authentication

### Turning off Two-Factor Authentication for yourself

1. You will not be able to turn off Two-Factor Authentication for yourself if it has been enforced by your Portfolio Manager.
2. If Two-Factor Authentication is not enforced by your Portfolio Manager, navigate to your name in the top right corner of [Latch Manager](#)
3. Tap 'My Account'
4. Tap 'Security Settings' under 'Two-Factor Authentication'
5. Tap 'Turn Off'

## Turning off Two-Factor Authentication for your Portfolio

1. Navigate to your name in the top right corner of [Latch Manager](#)
2. Tap 'My Account'
3. Tap 'Security Settings' under 'Two-Factor Authentication'
4. Tap 'Turn Off' at the bottom of the page

## Troubleshooting Two-Factor Authentication

### I cannot receive the authentication code

If you've turned on Two-Factor Authentication for yourself, or your Portfolio Manager has enforced it for all Portfolio and Property Managers in your Portfolio, you will need to enter an authentication code sent to your phone, every time you attempt to login to Latch Manager. If you have lost your phone, or your phone number has changed before you could change it in Latch Manager, contact us at [support@latch.com](mailto:support@latch.com) for guidance on getting into your account.

### I want to change the phone number used for Two-Factor Authentication

1. Navigate to your name in the top right corner of [Latch Manager](#)
2. Tap 'My Account'
3. Tap 'Security Settings' under Two-Factor Authentication

4. Tap 'Change phone number'
5. Enter the authentication code sent to your existing phone number
6. Enter your new phone number
7. Enter the authentication code sent to your new phone number

## How do I ensure people have the correct access?

Latch is designed to let the right people in. Below are some helpful best practices and tips to ensure people have the appropriate and timely access to spaces in your building.

- Ensure your property managers and staff are educated on Latch
- Name [doors correctly when creating them](#) to avoid mistakes when giving or revoking access to them
- Make Keys: see [best practices](#)
- Ensure your property managers and staff are given specific [key management permissions](#) and [device management permissions](#) that are appropriate to their security clearance
- [Add an expiration date](#) whenever you give a Key to someone. This ensures that their access automatically expires at the right time and ensures no unexpected prolonged access
- Set reminders if someone's lease is coming to an end, and if applicable, extend their expiration date
- [Remove someone's access](#) if their lease is abruptly ended or they no longer require access to an area or property