

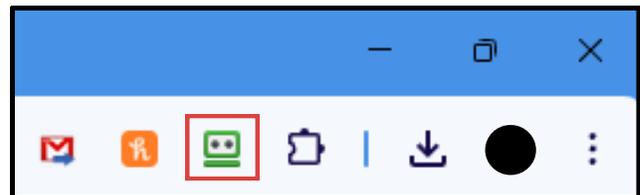
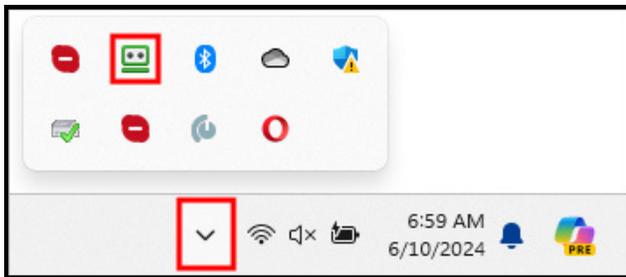
What is RoboForm?

RoboForm is a software tool designed to streamline your productivity on the web. At its core, RoboForm is a secure and convenient way to save and access your **login credentials**, **bookmarks**, **personal information**, and more.

RoboForm is available **across platforms and browsers**, including:

- **Windows**
- **Mac**
- **iOS**
- **Android**
- **Chrome**
- **Safari**
- **Edge**
- **Firefox**

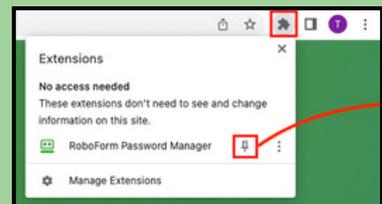
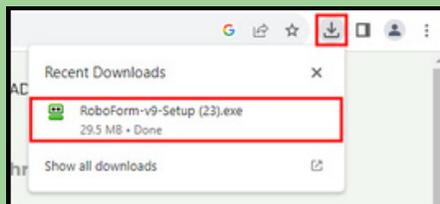
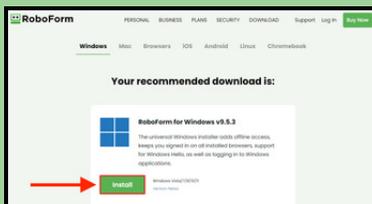
Look for the RoboForm icon in your system tray or on your browser's navigation bar!



Installation and Account Setup

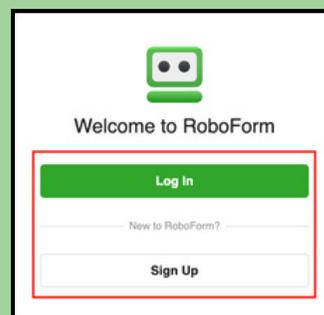
Installation:

1. Go to <https://www.roboform.com/download>.
2. Look for the recommended download for your system, and click the **green Install button**.
3. Click on the Downloads button on the top right of your browser window, and click on the installer.
4. You will be prompted to install the browser extension.
5. To keep RoboForm on your browser navigation, be sure to **Pin** it.



Account Setup:

1. From the RoboForm Start Page, you will have the option to create a new account or sign in to an existing account.
2. If you already have an account, click Log In and enter your credentials.
3. If you do not have an account, click Create New Account.
4. Enter your name, your email address, and choose a Master Password for your RoboForm account.



RoboForm Cheat Sheet

Logins

How to Save

On the Extension window:

1. Click the **blue + icon**.
2. Find the site you're on, or click **Create Your Own**.
3. Enter your account information and click the **Save button**.

How to Use

To use your saved login, simply select the website you're on from the RoboForm extension!

Autosave

When you enter login information you haven't input into RoboForm and click the Login/Submit button, you will be prompted to save the credentials to your RoboForm account.

Saving Other Data (Bookmarks and Safenotes)

Bookmarks: Navigate to the site you would like to bookmark. On the Extension window, click on the **Floppy Disk icon** on the bottom right.

Safenotes: On the Extension window, **click the dropdown menu located next to the Logins tab**, and select **Safenotes**. Click on the **blue + icon** on the bottom right.

A window will pop up that will allow you to save either of these items in the same way that you save a Login.

Identities

Creating an Identity

1. Go to the RoboForm **Start page**.
2. Select Identities on the **left side of the screen**.
3. Click the **blue + icon** on the bottom right.
4. Name the Identity, select your country, and click **Next**.

You Can Save Your:

- Name and Title
- Passport Details
- Credit Card Details
- Vehicle Information
- Workplace Info
- Address
- Bank Information

Using an Identity

When you encounter a form, click the RoboForm autofill icon and choose the Identity you'd like to pull information from, and click "Fill".

Staying Organized With Folders

When saving a new Login, Bookmark, or Safenote, you have the ability to place that login into an existing folder, or to create a new folder entirely. Just open the dropdown menu and choose your destination!

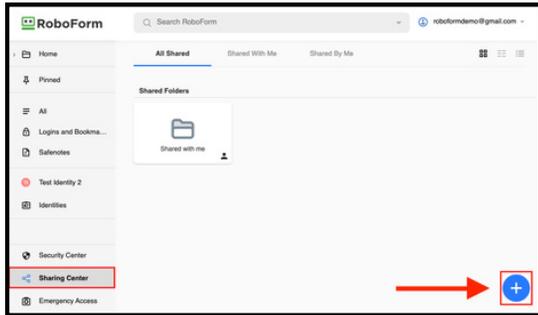
Differences Between Sharing and Sharing RoboForm Items

Sharing

Sharing RoboForm Data is like sharing a Google Doc - the shared data is updated to any changes (ex. changing a password) and access to the shared data can be revoked at any time. The sharer may choose multiple recipients.

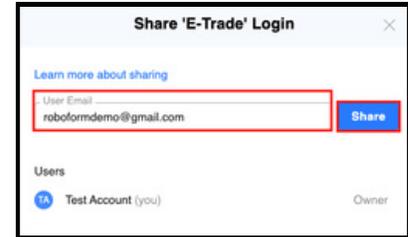
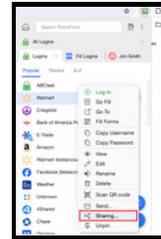
Sharing and Sending Individual Items

Right-click on a RoboForm item, choose either **Sharing** or **Send**, then enter the email of the desired recipient.



Sending

Sending RoboForm Data is similar to sending an email. The RoboForm data is sent once, and any changes won't be updated (ex. changing a password) to the recipient and access to the sent data can't be revoked. You can send an item to multiple recipients.



Creating Shared Folders

On the RoboForm Start page:

1. Click on the **Sharing Center button** on the left side of the screen.
2. Click on the **blue + icon** on the bottom right.
3. Name your Shared Folder and choose the recipients you would like to have access to it.

Security

Compromised Passwords

On the RoboForm Start page:

1. Click on the **Security Center button** on the left side of the screen.
2. Click on the **Compromised Passwords tab** to see a list of your passwords that have been exposed in a data breach.

Login Limits

To access your RoboForm Security settings from the Extension,

1. Click the 3 dots in the upper right.
2. Select Settings, and then select Security on the left side of the screen. From here you can select your preferences for:

Authentication Method

1. **Always ask for Master Password** - When checked, means you can only log in by typing your Master Password.
2. **Windows Hello** - Allows you to use Windows Hello to log in instead of your Master Password.
3. **Use Fingerprint** - Allows you to use your fingerprint to log in instead of your Master Password.
4. **Don't ask for Master Password** - When checked, turns off the prompt requesting the Master Password. For security reasons, we recommend against this.

Automatic Logout

1. **Auto-Logout on User Switch or Lock Workstation** - Automatically logs you out when you switch users or lock your workstation (only available in Editor).
2. **Auto-Logout After This Many Minutes** - The time period before RoboForm automatically logs you off. You can turn off Auto-Logout by checking the box in the Editor. The number at the bottom shows the amount of minutes before Automatic Logout. To change the time period, simply type in a number or click the up and down arrows to select a number of minutes.

Two-Factor Authentication

1. **Email**
2. **SMS Text**
3. **Authenticator App**
4. **Off**