



# Tap2Open

SmartGuard

User's Guide

Version 2.0

4/18/24



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### Introduction:

The Tap2Open Guard Interface was designed to provide security guards the functionality they need to manage guests at a gate. This guide will walk through the various features and options. With Tap2Open, most guests can open the gate(s) themselves without stopping to speak to the guard (depends on the gate configuration and community rules). However, there are many times when a guest may be confused and pull up to the guard even with an invitation. The software allows guards to see all invitations, create invitations, lookup resident details, open the gate(s) and more.

### Device Types:

The entire Tap2Open system, including the guard interface, is accessible via smartphone, computer or tablet. For PC's, there is a simple web browser interface. For smartphones and tablets, there are iOS and Android apps available. While the browser version will work on tablets and smartphones, the apps add an enhanced user experience.

With a connected tablet, the system can also be used by roaming guards while patrolling the neighborhood.

### Guard Accounts:

Tap2Open typically adds an address for the clubhouse and each guard house for employee and administrator accounts. If there isn't a physical address, we make one up that approximates its location in the community. The appropriate address can then be used for the employees' accounts.

### Logging In:

You should have a login & password for your account. The same credentials (username & PW) work will work for all versions.

On a computer, go to Tap2Open.com. A login button can be found in the upper RH corner of the screen. Log into the **Dashboard Login** for guard functionality.

A green rectangular button with rounded corners and a white border. The text "Dashboard Login" is written in white, bold, sans-serif font.

On a tablet or smartphone, click to open the appropriate (Android or iOS) app. Use the **T2O Dashboard** app.

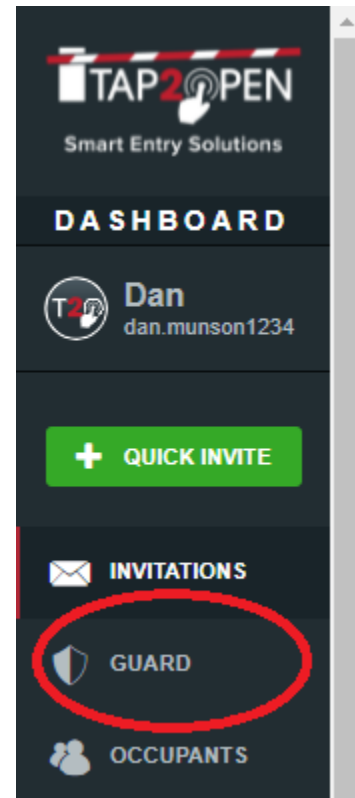




### Accessing the Guard Interface:

On the LH side of the screen you will see the menu items for the different screens. Choose guard.

**Note:** Only neighborhoods that have subscribed to the guard interface will have this option. If you don't see this option, either your neighborhood doesn't subscribe, or as a user you don't have guard access.



### Types of Guests – Scheduled and Unscheduled

There are two types of guests in the system:

- **Scheduled** – These are guests where a resident has created an invitation for the user. In most communities, this means the guest can let themselves into the community using their smartphone.
- **Unscheduled** – These guests show up unannounced to the gate. The guest may be unexpected or perhaps the resident has simply forgotten to create an invitation for the guest.

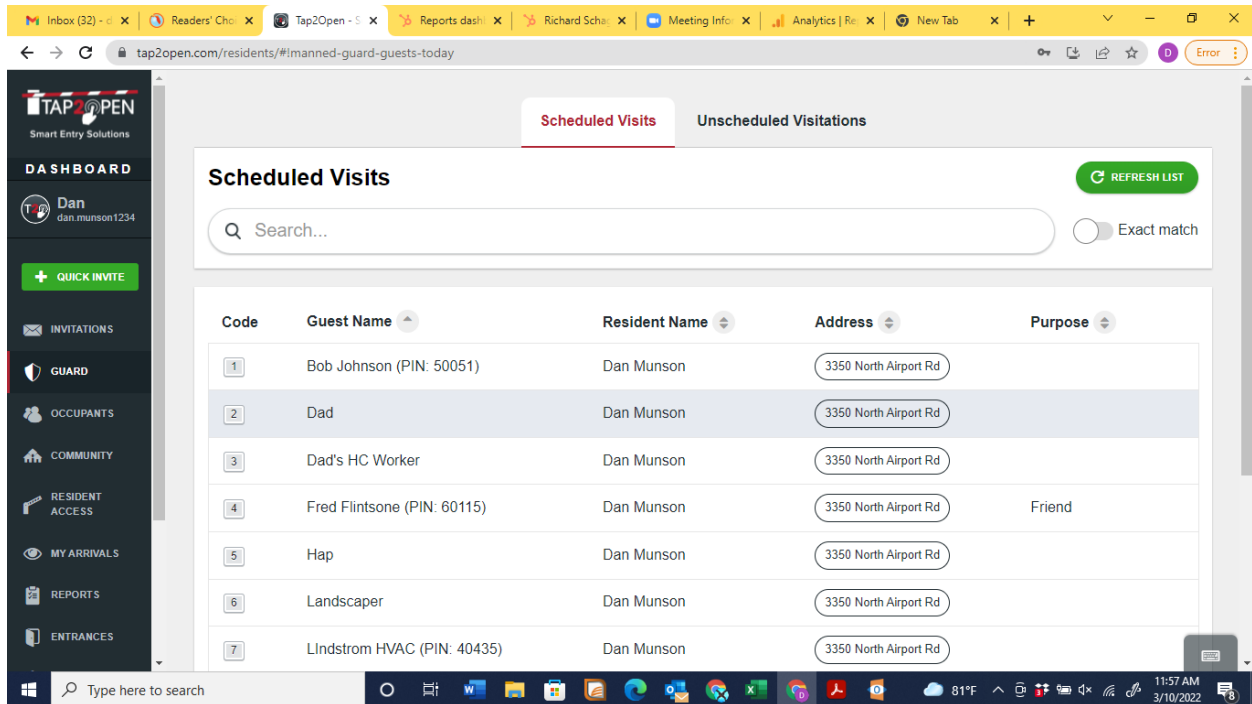
Tap2Open handles both types of visitors, but there is different functionality for each type.

**Options:** In some cases, the community does not allow guests to open the gates. In this case, we can turn off that functionality, and each guest must be admitted by the guard. The invitation system can still be used by residents to invite guests, and guards use the guard functionality to admit guests.

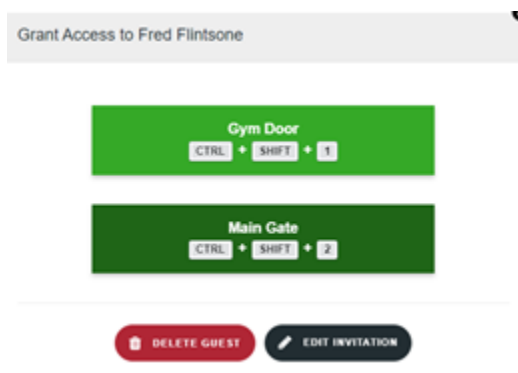


### Scheduled Guests:

Most guests in Tap2Open should be scheduled. Again, in most neighborhoods, these people can open the gate themselves and go through the resident line. However, in some cases, the guest can't find their invitation or is confused, and they will go approach the guard to be let in. Guards can see every active invitation in the system. The screen looks like the screen below:



This screen shows the guests with active invitations. An *active invitation* is one where the guest has access to the neighborhood/gate at the *current time*. To allow the guest in, the guard can simply click an item in the list or the corresponding Code on the LH side of the list. That will bring up the following dialog box:



### Grant Access/Open Gate:

On the screen, there is a list of the gates/doors in the neighborhood on the Tap2Open system. The guard can either click on the button on the screen or use the keyboard combination shown.

There may be too many items to show; in this case, the guard can search for the invitation. The search bar can be used to search for a name; the name can be



the name of the guest OR the resident. The list can also be sorted by any of the columns using the up/down arrows next to the column names.

Code	Guest Name	Resident Name	Address	Purpose
1	Dad	Dan Munson	3350 North Airport Rd	
2	Dad's HC Worker	Dan Munson	3350 North Airport Rd	

Once the proper invitation has been found, the guard can click on the item on the screen, or use the keyboard **code** shown to open the gate.

Exact or partial match  **Exact match** is also an option. If you choose **Exact match**, you must spell the name correctly. If you do not choose exact match, the system will use phonetic searching to find the closest matches.

There are also 2 buttons in the dialog box: [Delete guest](#) and [edit invitation](#). These are usually used by the guard when a resident calls and asks them to modify or delete an invitation.



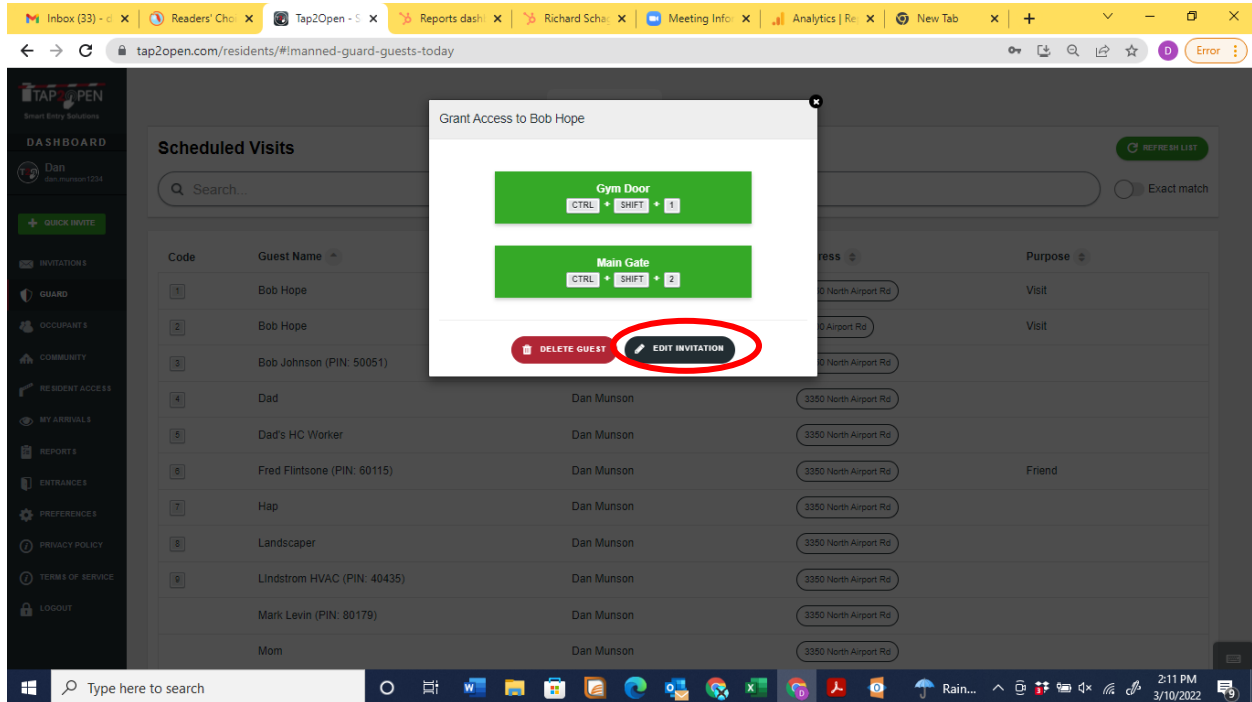


Editing an Invitation:

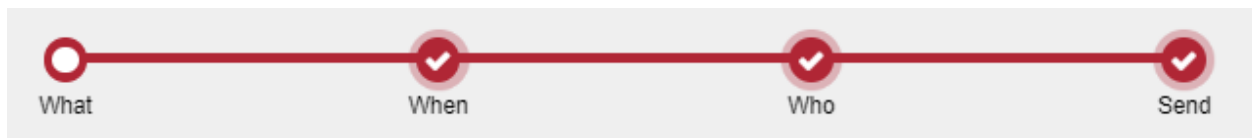
If a resident would like an invitation to be edited, do the following:

Pick the **Scheduled Visitor** tab.

Look up the resident or guest. Find the relevant invitation. Click on the invitation, or open it using the keyboard shortcut. In the dialog box, choose Edit Invitation:



You can now edit the invitation. Note that you do not have to go through all of the steps of creating an invitation. Simply edit the tab that's necessary by clicking on the bar at the top.



Once you are finished changing the invitation, you can simply click on another step, and the changes will be saved. You do NOT have to resend the invitation to the guest. However, you may WANT to send it to them if the details have changed.

All of the steps in creating an invitation are explained later in this document.

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Deleting an Invitation:

If a resident would like an invitation to be deleted, do the following:

Pick the **Scheduled Visitor** tab.

Look up the resident or guest. Find the relevant invitation. Click on the invitation, or open it using the keyboard shortcut. In the dialog box, choose Delete Guest:

Code	Guest Name	Purpose
1	Bob Hope	Visit
2	Bob Hope	Visit
3	Bob Johnson (PIN: 50051)	Visit
4	Dad	Visit
5	Dad's HC Worker	Visit
6	Fred Flintstone (PIN: 60115)	Friend
7	Hap	Visit
8	Landscaper	Visit
9	Lindstrom HVAC (PIN: 40435)	Visit
	Mark Levin (PIN: 80179)	Visit
	Mom	Visit

That invitation has now been deleted.



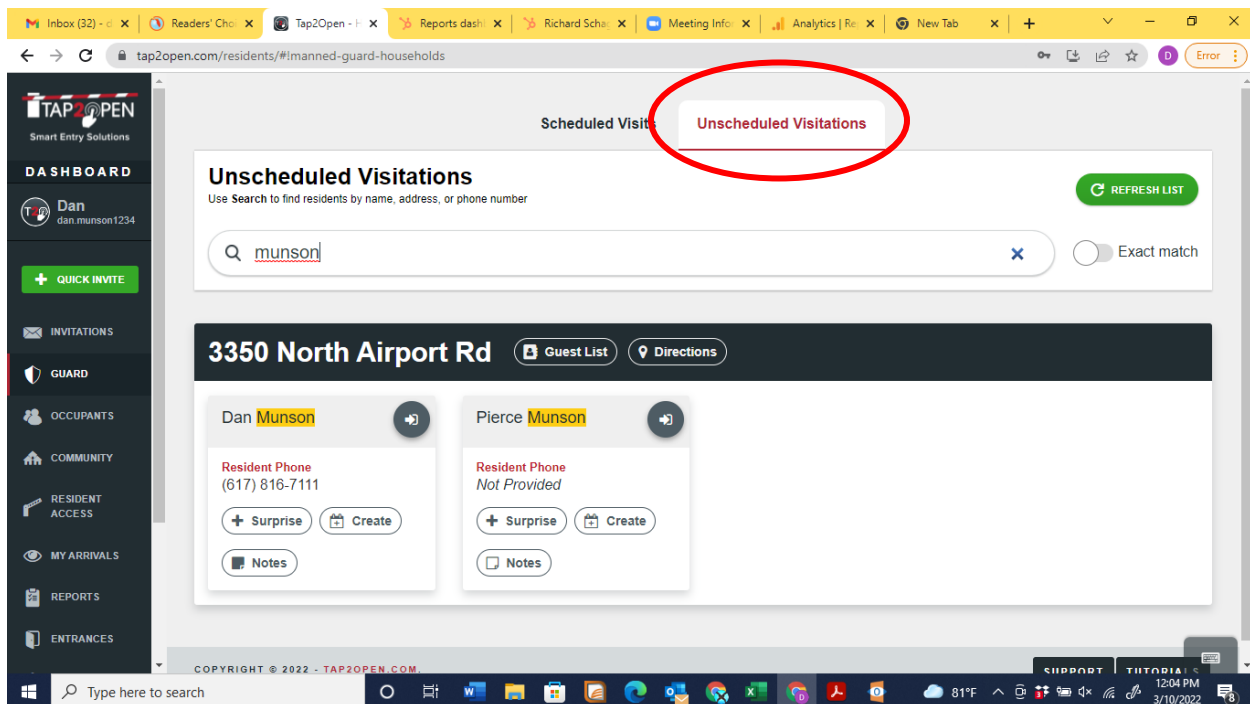


### Unscheduled Visitations:

These are guests that show up unannounced to the gate. The guest may be unexpected or perhaps the resident has simply forgotten to create an invitation for the guest. With Tap2Open, guards can lookup residents and their contact info, and clear guests.


### Clearing an Unscheduled Visitor:

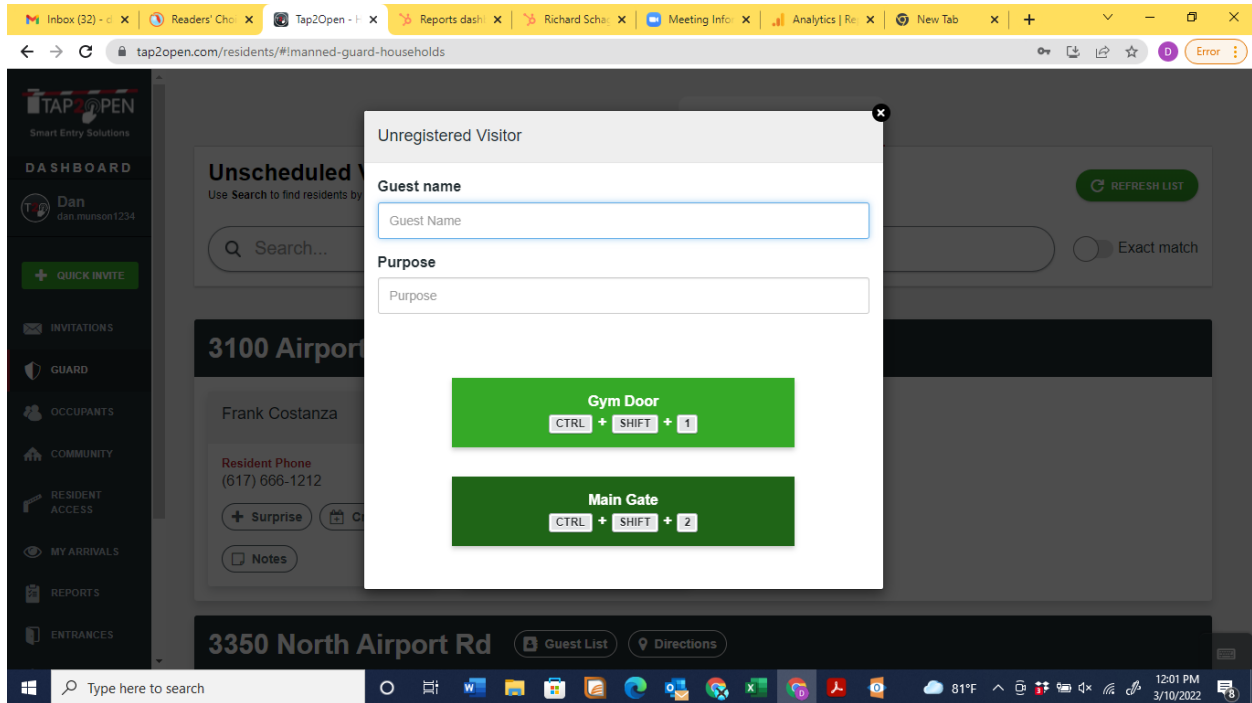
Click in the **Unscheduled Visitations** tab at the top. You will see the following screen. This is a list of all the residences and residents/users.



In the case of an unscheduled guest, typically the guard must reach out to the resident to get approval to admit the guest. *This usually starts by getting the guests name/company and the name of the resident.*

Typically, the guard will then search for the name of the resident. It is recommended that the guard search using the LAST NAME of the resident. Once the resident is found, the guard can see the resident's contact information.

After the guard has contacted the resident and gotten approval, the guard can log the visitor using the **+Surprise**  button. The following dialog box will appear:



Here the guard can enter the info on the guest. At a minimum, this is usually the name of the guest, but other fields can be added. When the guard is ready to open the gate, they either click the onscreen button, or use the keyboard shortcut for that entrance. The gate opens!

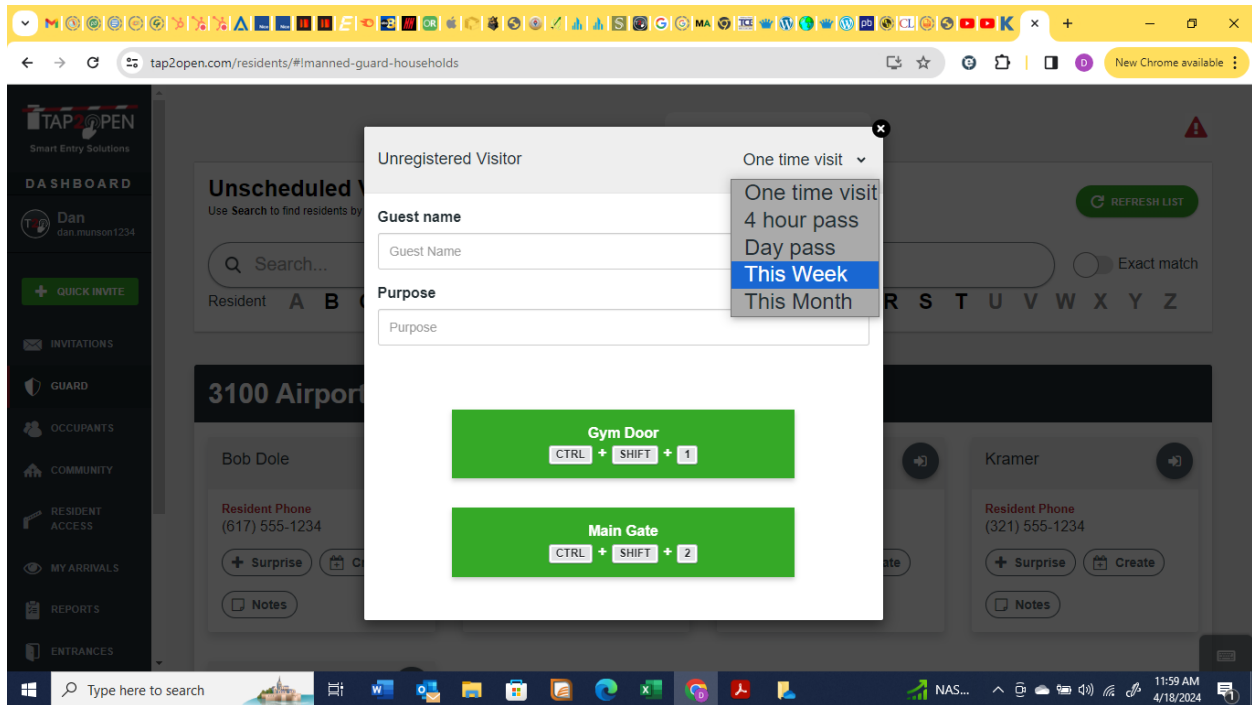
**By using the buttons in the system for entrance, the entry will be logged by Tap2Open. It is not recommended to use a different clicker or button, as this will not log the entry!**

Options: Additional fields can be added to the screen so that guards collect additional data on visitors.

Options: Tap2Open now offers a license scanner to capture the license details of guests without the guard needing to key in the information. It automatically populates the fields on the screen. Contact Tap2Open for further information.

Adding an Invitation on the Fly for an Unregistered Visitor:

When an unregistered visitor comes to the gate, there may be reasons that the visitor will be returning. There is a simple option to create an invitation on the fly for the visitor. On the screen where the guard is opening the gate, there is a pull down in the upper RH corner as shown below:



This will default to one time. So if the visitor will return (like a plumber that may need to come in and out after buying supplies) it would be appropriate to change this to a day pass. You then need to send this to the visitor if they're coming back for quick entry.

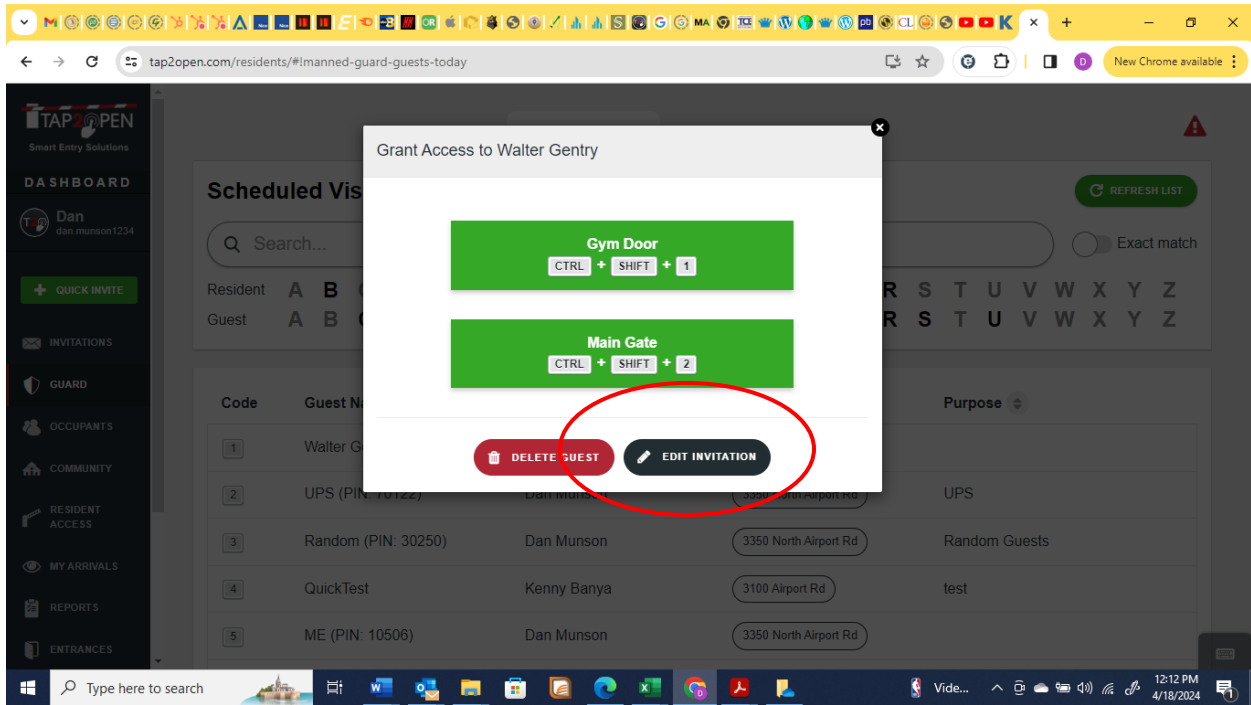


Simply go back to Scheduled Visits tab on the Guard Screen and find the invitation on the list. Click on it. It will show the dialog screen to allow entry. Click on the invitation.

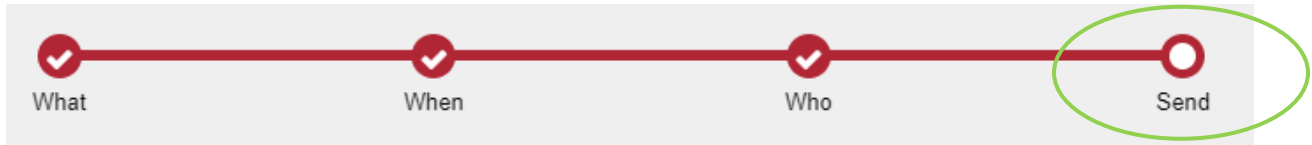
The screenshot shows the Tap2Open web application interface. The 'Scheduled Visits' tab is active, displaying a table of scheduled visits. A red oval highlights the first row of the table, which contains the following data:

Code	Guest Name	Resident Name	Address	Purpose
1	Walter Gentry	Bob Dole	3100 Airport Rd	
2	UPS (PIN: 70122)	Dan Munson	3350 North Airport Rd	UPS
3	Random (PIN: 30250)	Dan Munson	3350 North Airport Rd	Random Guests
4	QuickTest	Kenny Banya	3100 Airport Rd	test
5	ME (PIN: 10506)	Dan Munson	3350 North Airport Rd	

It will show the following dialog. Choose edit:

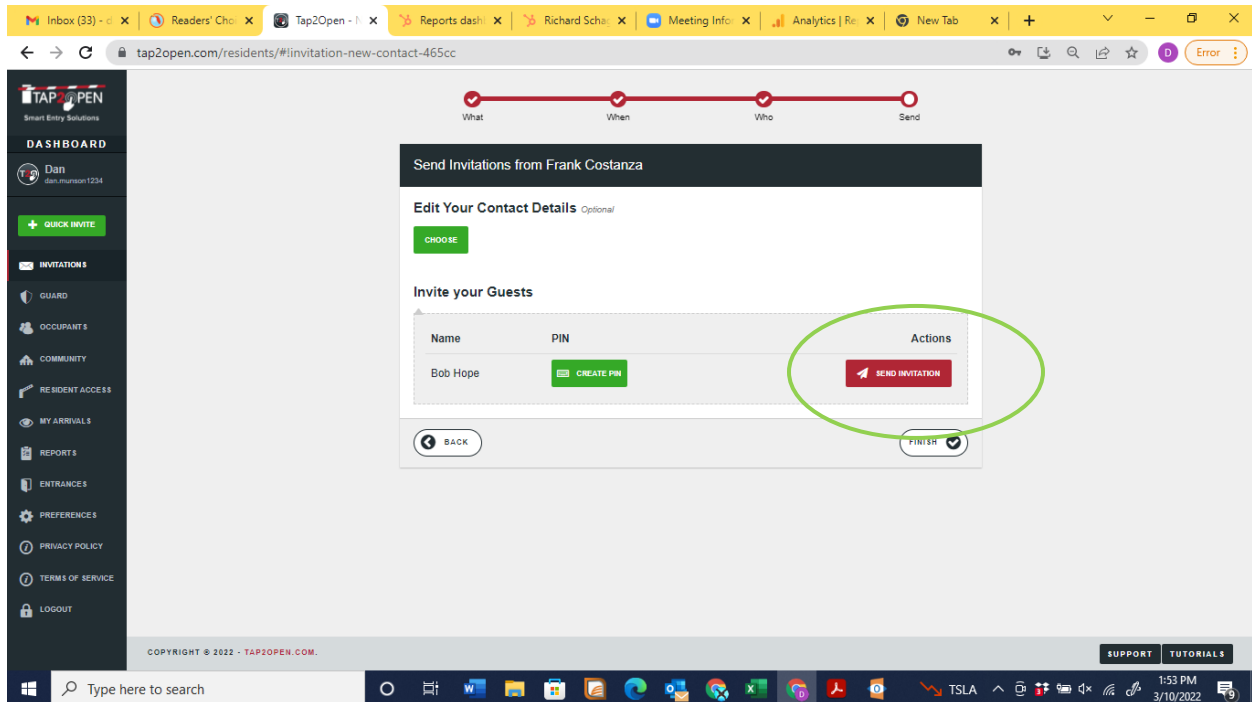


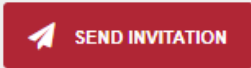
You will see the screen. Click on Send at the top:





It will bring up this dialog.

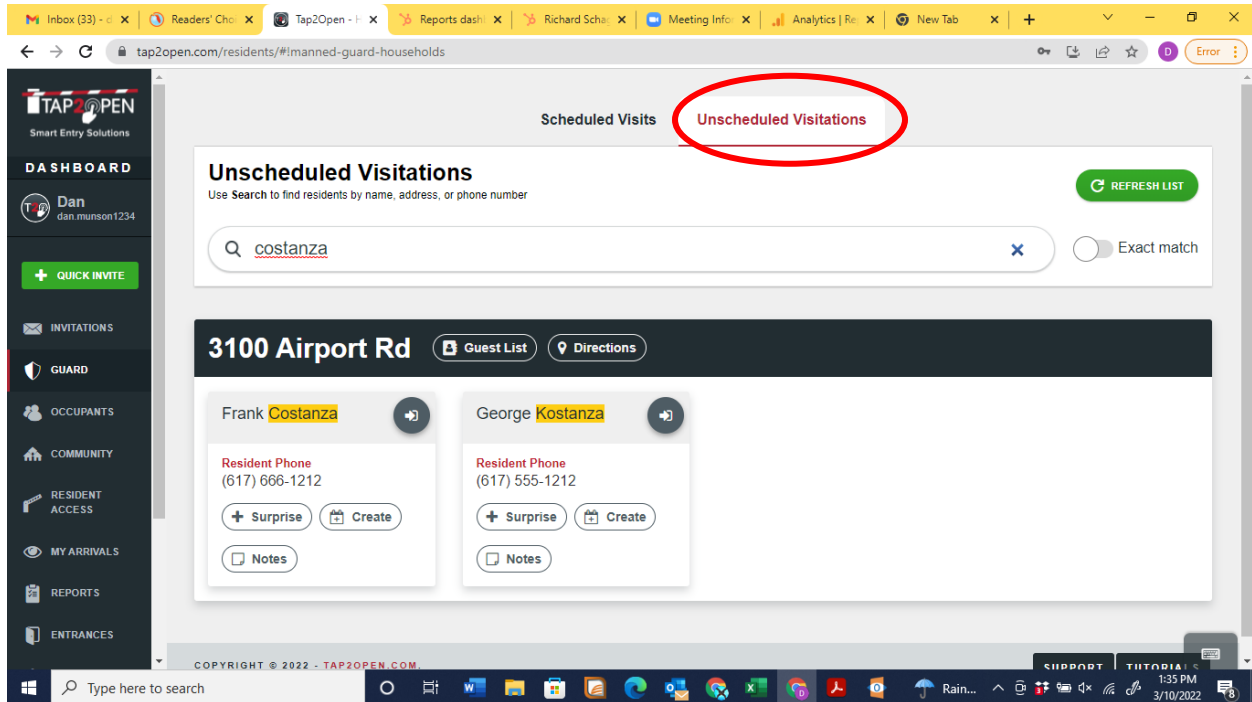


Then hit the **Send Invitation**  button. Then choose the method to send. This is covered in the following section under [Sending an Invitation](#).



### Adding an Invitation for a Resident:

In many cases, the guard is asked to create an invitation by a resident. To do this, first lookup the resident in the unscheduled visitors tab.



The guard can search for the resident's contact information by name, address or phone number. Do a search and find the resident you're looking for.



The screenshot shows the 'Unscheduled Visitations' page in the Tap2Open application. The search bar contains the name 'costanza'. Below the search results, two resident cards are displayed for 'Frank Costanza' and 'George Costanza'. Each card shows the resident's phone number and two buttons: '+ Surprise' and '+ Create'. The '+ Create' button for Frank Costanza is circled in red. The page also includes a 'REFRESH LIST' button and a '3100 Airport Rd' header with 'Guest List' and 'Directions' options.

Click on the **Create** button. This is where you add the invitation details. Start with the purpose of the visit.

The screenshot shows the 'Create' form for an event. The 'Name/Describe Frank Costanza's event' header is visible. The 'Purpose' field is filled with 'Visit'. The 'Choose entrances' section shows 'DEFAULT ENTRANCES' and 'SPECIFIC ENTRANCES' tabs. Under 'SPECIFIC ENTRANCES', 'Gym Door' and 'Main Gate' are selected with green toggle switches. A 'NEXT' button is visible at the bottom right of the form.





You can also either give the visitor access to the default entrances, or to specific entrances. See the example above which shows the individual entrances. If you pick specific entrances, those entrances will be the only ones available to the guest.

Hit **Next**. Then choose the time period(s) when the guest will have access to the gates. The time period defaults to the rest of the current day.

Clicking one of the **Quick Schedule** buttons allows access for the day(s) shown, 24 hours a day (unless the gate has a more restrictive schedule).



However, if you click the **change**  button, there are several more options:

The screenshot shows a mobile application interface for configuring an invitation. At the top, a progress bar with four red checkmarks is labeled 'What', 'When', 'Who', and 'Send'. Below this is a dark header with the text 'Dates/Times Invited'. The main content area is divided into three columns: 'Starting', 'Ending', and 'Actions'. The 'Starting' column shows 'March 10th 2022 12:00am', the 'Ending' column shows 'April 11th 2022 12:00am', and the 'Actions' column has a red trash icon labeled 'DELETE'. Below this is a dashed box titled 'When may guests arrive?'. Inside this box, there are several input fields and controls: 'Start Date' (Mar 25, 2022), 'End Date' (May 18, 2022), 'Visit Time' (with buttons for 'ALL DAY', 'DAILY SCHEDULE', and 'START/END'), a 'START OF DAY' to 'END OF DAY' range selector with a green line and circular markers, 'Visit Day(s)' (with buttons for 'EVERYDAY' and 'SPECIFIC DAY(S)'), and 'Repeat every' (with buttons for 'SU', 'M', 'TU', 'W', 'TH', 'F', 'SA'). At the bottom right of the dashed box are 'CANCEL' and 'ADD' buttons. At the very bottom of the screen are 'BACK' and 'NEXT' navigation buttons.



You can pick a **Start Date** and **End Date**. Under **Visit Time**, all day provides 24 hour access on the day(s) shown. Under **Daily Schedule** you can grant access for a specific time period for the days shown. If you pick **Start/End** the beginning and end of the time period are set for the period shown (see below):

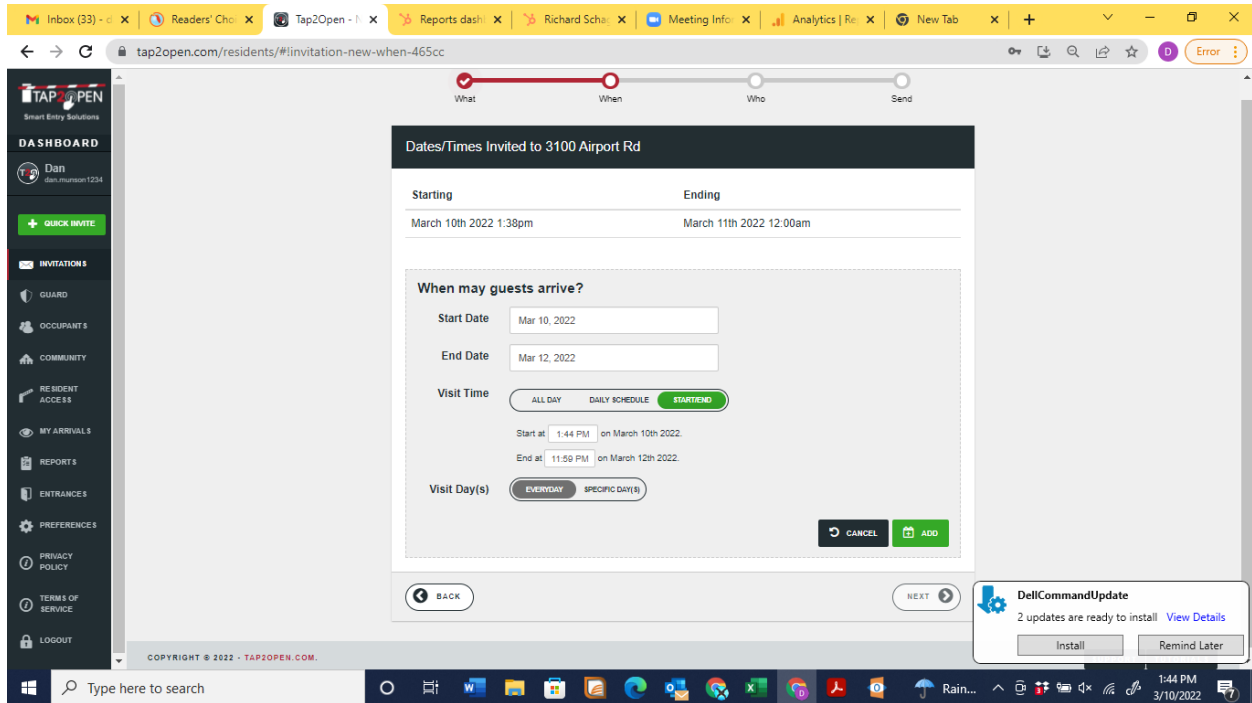
The interface shows a progress bar at the top with four steps: 'What' (checked), 'When' (active), 'Who' (checked), and 'Send' (checked). Below the progress bar is a section titled 'Dates/Times Invited' with a table:

Starting	Ending	Actions
March 10th 2022 12:00am	April 11th 2022 12:00am	DELETE


Below the table is a dashed box titled 'When may guests arrive?' containing the following form fields:

- Start Date:** Mar 25, 2022
- End Date:** May 18, 2022
- Visit Time:** Three buttons: 'ALL DAY', 'DAILY SCHEDULE', and 'START/END' (selected).
- Start at:** 8:08 AM on March 25th 2022.
- End at:** 11:59 PM on May 18th 2022.
- Visit Day(s):** Two buttons: 'EVERYDAY' and 'SPECIFIC DAY(S)'.


At the bottom right of the dashed box are 'CANCEL' and 'ADD' buttons. At the bottom of the entire screen are 'BACK' and 'NEXT' navigation buttons.



Under **Visit Day(s)**, you can choose which days of the week the user can access the property.

Then hit **ADD**  to add the time period for access. You can add more than one time period by hitting ADD again!

Next, **Invite a guest**:

Press the Next  button. Enter the guests name, or choose from the address book.

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tap2open.com/residents/#invitation-new-who-465cc

What When Who Send

Guests visiting Frank Costanza

Name	Shareable Invite?	Actions
No guests. Click 'Add' to add more.		

Invite a guest

Name

Advanced Settings

Can guests re-use passes?

Send alert when guests arrive?

DelCommandUpdate  
2 updates are ready to install [View Details](#)

Hit the **Add** button:



tap2open.com/residents/#invitation-edit-who-465a2

What When Who Send

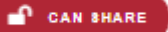
Guests

Name	Shareable Invite?	Actions
Mark Levin	<input checked="" type="button" value="CAN SHARE"/>	<input type="button" value="EDIT"/> <input type="button" value="GUARD NOTES"/> <input type="button" value="DELETE"/>

Advanced Settings

Can guests re-use passes?

Send alert when guests arrive?



You will now see the that a **Can Share** button comes up. If this says “Can Share”, that means the user can forward on the invitation to others. If the invitation says “No Sharing” that means the invite is locked to the device and cannot be shared.

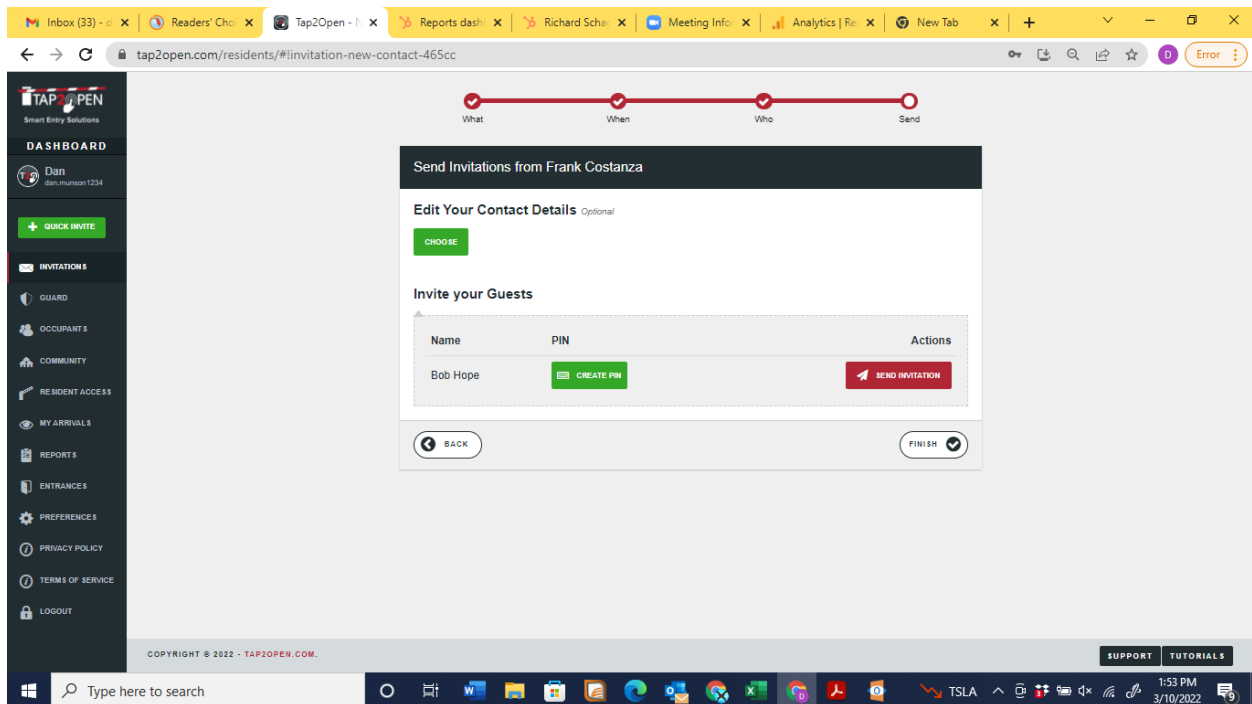
**Options:** The neighborhood can specify whether invitations can be shared. This can be set in Tap2Open. Please have the system administrator contact us to change this.

### Advanced Settings

Under **Advanced Settings**, you see the invitation can be made one time, or reuse pass. In addition, the resident can be notified when a guest arrives via email or text. By default this is by email. Click on either side of the button. The **green** side is the active side. **Hit Next.**

### Send the invite:

On this screen, you are telling the system how to send the invitation to the guest.



**CHOOSE**

The Choose button, allows the user to set preferences fo this guest. If they use the default, it will set default information on the sender. In general leave this as default.

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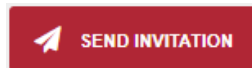


You will then see the guests name. Beside it it MAY say PIN with a **create pin** button. Click on this to create a PIN for the user. This only applies if the neighborhood uses Tap2Open keypads. This generally doesn't apply to entrances with guards. However, it may apply if there are other gates or doors using Tap2Open away from the guards.

In Tap2Open, the PIN is unique and specific to the invitation. The PIN follows the same access rules as the invitation, and will automatically expire when it is no longer valid.

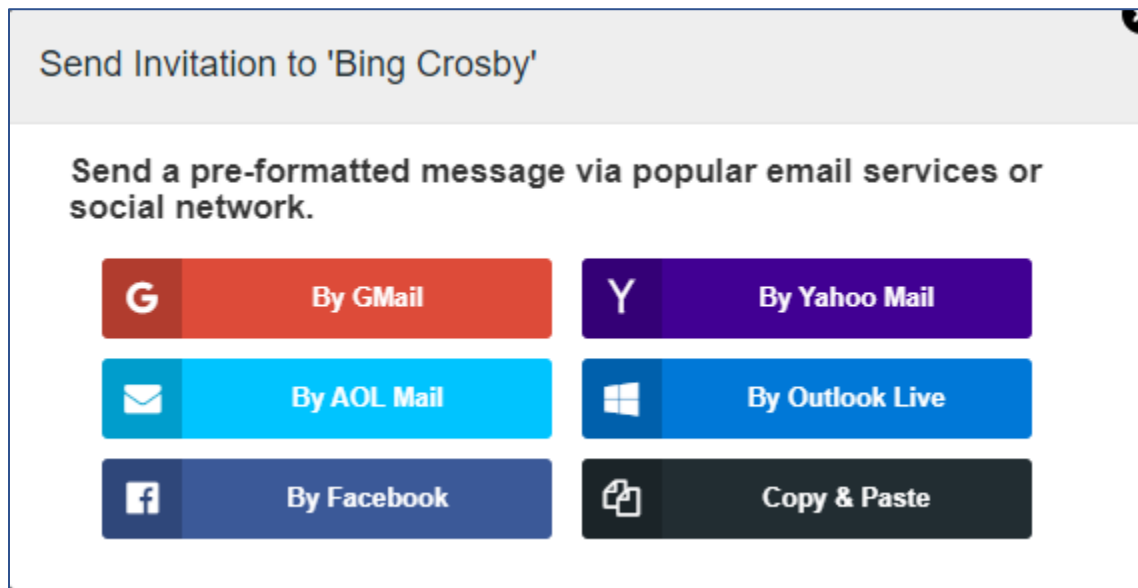
**Option:** PINs can be given to guests with Tap2Open keypads.

**Note:** If you hit **FINISH** without sending the invitation, it is still a valid invitation. This could be used in a case where PINs are being used or if the guard clears the guest.



Then hit the **Send Invitation** button.

The screens may look slightly different using a tablet, phone or computer. This is the computer view:



Click on the method you would like to use to send the invite. On smartphones & tablets, using the Tap2Open app, there is a text message button that doesn't appear here.

Choose the method you would like to use. It will queue up the message for you, then hit Send.

If you don't see the app or method you would like to use, choose **Copy & Paste**. It will create an invitation link for you that can be pasted into any app or document. Simply hit copy and then paste into the other app or document.



### Send Invitation to 'Bing Crosby'

Send a pre-formatted message via popular email services or social network.

**G** By Gmail      **Y** By Yahoo Mail

**✉** By AOL Mail      **☰** By Outlook Live

**f** By Facebook

---

### Copy and paste


Use one of the provided message versions below with any email or messaging application

1. Choose a message length (below) that provides the length of message you want to send.
2. Click the "Copy to clipboard" button to copy the text from the Message Preview.
3. Switch to your preferred app and create a new message.
4. Paste the copied text into your new message.

### Message Preview

To visit Dan click this link before leaving: [https://tap2open.com/v?8EJFrFaaWdusQf1L\\_cEL4Vou1bjdYuHE](https://tap2open.com/v?8EJFrFaaWdusQf1L_cEL4Vou1bjdYuHE)

Short

 **COPY TO CLIPBOARD**

The actual invitation looks something like this:

To visit Dan click this link before leaving:

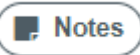
<https://tap2open.com/v?sGdFuASaY3isLNLVE0LDqUuVZHH3nh4>

There are short and long versions, and simply the URL to click. Use the one which is most appropriate.







Adding Notes about Residents:

There is also a option to add notes  **Notes** about a resident.

### Notes for Dan Munson

#### Notes

Likes packages left in his gatehouse.


 **SAVE**  **CANCEL**

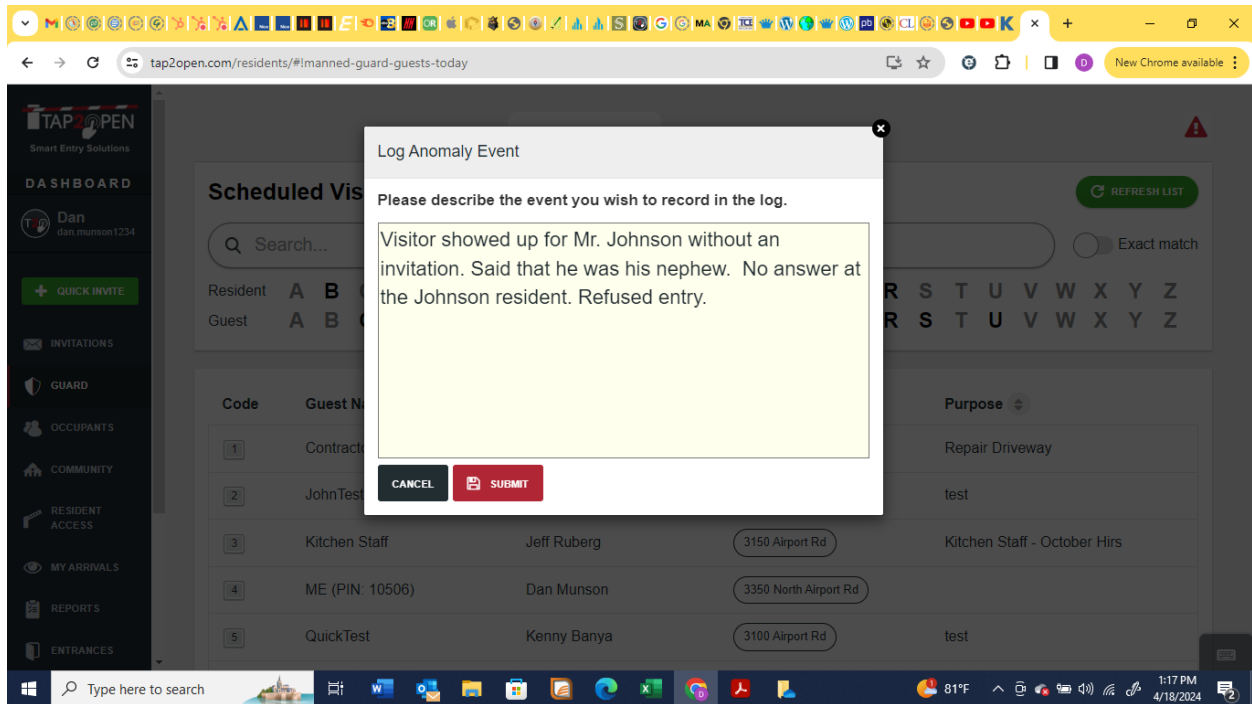
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### Incident Log:

A incident log has been incorporated into Tap2Open. This allows guards to document incidents for later review by staff. On the main guard screen, there is a small triangle icon  in the Upper RH corner. Click on that icon. This will bring up a dialog box to document the incident. These entries can be reviewed later by management with community manager privileges.



The Anomalies Report can be found under Reports>Community Arrivals. Choose either With Anomalies or Just Anomalies.

**Release Date: 4/19/24**