INTRODUCTION

Almost all Tap2Open features can be managed by a community manager account. Additionally you can view logs, check the status of the on-premesis equipment, and change various system settings.

Unlike most telephone entry systems Tap2Open manages multiple residents per dwelling. This is much more powerful than a single flat list of residents or forcing every resident to share a single account per household. Keep in mind, however: The list of dwellings is static and is created when your system is first setup. If you need to update the list of dwellings in your community please reach out to Tap2Open support.

Finally, please keep in mind that Tap2Open technical support can not manage user accounts over the phone or via e-mail.

① Adding a Resident

To add a resident to a dwelling first select `Community` from the navigation bar. Select the household containing the relevant resident. You can use the search feature to simplify finding them.

Next click the `View Details` button to see the detailed list of residents for the dwelling:

Next click the `Add Resident` button:

You will then be shown a form to fill in for the new resident. Not all of the information is required and some fields, such as username, will be automatically generated if you do not put in a value.

Enter the user's first name and their e-mail address. If you do not fill in their username the system will automatically generate an appropriate one. If you entered the new resident's e-mail address and have this option set:

The system will send the new resident an e-mail with instructions on installing the apps and setting up their password automatically.

If a resident does not have e-mail or does not wish to provide their e-mail address you can set their password manually once they are created from the `Password` menu. You can then communicate their username and password to them through other means.

Another option to take note of when creating a resident is if you enable their "supervisor" access:

When this setting is set to Yes the newly created resident may:

- Add, remove, or modify other residents in their household (up to the community limits).

- See the visits of their household (including those of other household members).

This allows a resident to setup their family without the community manager having to gather information about the entire household.

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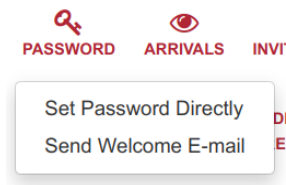**1-561-740-OPEN (6736)**

② Understanding The Welcome E-Mail

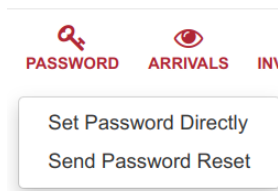By default when a resident is added they are sent a "Welcome e-mail." This e-mail contains:

- A brief description of Tap2Open.

- Instructions on installing our apps or logging in via a web browser.

- A link to set their password.

This e-mail is in many ways similar to a password reset e-mail, just with additional details to help out a first-time user. In fact, Tap2Open will not send out the Welcome e-mail to a resident who has logged in.

Clicking on the password button for a particular resident may show different options depending on if this account has ever logged in. For a new resident the Password drop-down menu looks like this:

And for a resident who has logged in notice that the welcome e-mail option has changed to:

In fact if a user who has never logged in requests a password reset they would receive the welcome e-email if they have never logged in.

③ Moving Residents Out

When the owners of a dwelling are moving out it is necessary to cancel their access. There are several ways to do this and each has subtle nuances that a community manager should be aware of.

Navigate to the `Community` tab and select `View Details` for the dwelling in question. The simplest way to "move out" this dwelling is to click the `Move Out` button:

Clicking this button will perform the following actions:

- Delete any residents in this dwelling.

- Delete all access tokens and invitations created by the deleted residents.

- Note the "move out" time in the dwelling.

This action will not delete any of the visit records that the deleted residents have. You may continue to view these records up to the data retention period.

Keep in mind that for privacy reasons normal residents (i.e. non-managers) may not view any visitation history prior to the "move out" time of the previous residents. This is the big difference between using the `Move Out` button and deleting the individual resident accounts explicitly.

In the case of a rental property the date the tenants are moving out can be set so that a community manager does not have to remember to cancel access when the lease has ended. To schedule an automatic move out at some point in the future click:

MANAGE AUTO MOVEOUT

This will allow you to set a specific date and time. If a date and time is set there is no need to worry as you can always update or cancel it.

④ Delegating Management Duties

Some systems allow only a single account to have manager privileges. This is not the case for Tap2Open. In many smaller communities management duties are shared between residents every so often.

As such it is possible to grant or revoke manager privileges to user accounts at any time. When clicking `Details` on a resident account there is a drop down with the various user roles:

Community Role

Resident

Changing the role of a resident to `Community Manager` allows that resident to view and change any user data in the system, so do so cautiously. However, the system does keep an audit trail of most changes performed by manager accounts.

⑤ Activity Reporting

Tap2Open has a variety of reporting functions that allow a community manager to see what is going on at a community. This functionality is available under the reports section of the dashboard. Which looks like this on a desktop computer:

REPORTS

NOTE: Not all reporting functionality is available in the smartphone apps. However the dashboard login web page does work on mobile devices as well.

Many reports are linked with each other. As such clicking on an item in some reports (e.g. an invitation looked up by PIN or the heat map) will take you to a more detailed view of the visit log.

Additionally many screens will have a download button in the heading:

Clicking this button will allow the data on this screen to be downloaded in CSV (Comma Separated Value) format. This file can then be imported into other software, such as a spread sheet, for further analysis.

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