



INTRODUCTION

The Tap2Open virtual call box provides a dial-by-name service for visitors to reach residents for access. A (unique to each entrance) telephone number on a sign (optionally with a QR code) is called by surprise visitors when they arrive at the gate.

The visitor is then given instructions to dial the resident by name (although other configurations are possible in special scenarios). As dialing by name on a phone keypad can result in ambiguity the system requests that the visitor keeps dialing until a sufficiently small list of candidate residents is obtained.

Optionally the system may further disambiguate the desired resident by asking the visitor to dial the house number.

Once the visitor selects a resident they are placed on a brief hold while the system attempts to call the resident.

The resident will be called by the number associated with the entrance the visitor is calling from. Residents may add these numbers to their phone's contact list for quicker identification of visitor calls.

The system will then inform the resident that there is a visitor at the entrance wishing to contact them. When the resident accepts the call they are then connected to their visitor.

The resident can use the digits on their phone to perform certain actions including opening the entrance for their visitor.

NOT A TRADITIONAL CALL BOX

Legacy call boxes were designed when each household had its own telephone number. In the modern world every resident has their own phone number.

When setting up residents for the virtual call box it is important to understand that there is no special designation of one resident in a household above the others.

Therefore try to avoid using names and recordings such as "John and Mary Smith" for a resident name.

If a particular household wishes to have only one person receive calls from the virtual call box then a better approach is to disable the virtual call box for the residents who do not wish to participate.

LOGGING

All calls (even those that do not grant access) are logged. The log includes the originating telephone number (guest's cell phone number) as well as a caller ID name (if available).

Calls that do not grant access are shown as anomaly events in the log. All call logs include the duration of the call to help communities better understand waiting times for visitors.

ABUSE PREVENTION

To prevent abuse the Virtual Call Box will limit the number of calls to the community from a specific phone number within a period of time.

Furthermore residents may choose to block a specific caller (e.g. due to harassment or stalking) for a longer period of time.



TRIGGER CODES

When a visitor is prompted to dial-by-name the 0 digit is not assigned to any letter. This digit is therefore available as a prefix for special actions.

To manage the list of special actions begin by selecting the community screen from the dashboard main menu:



Then go to the community settings menu by clicking on the gear icon:



Under the **Virtual Call Box** section select **Special Prefixes** to manage the list of prefixes.

When adding a prefix do not add the leading 0.

RESIDENT DIRECTORY CODES

As with many physical call boxes it is possible to assign a code to each resident. This allows visitors to shortcut the task of searching for a particular resident by dialing a numeric code. For example, if a prefix of 601 is designated as direct dialing "James Smith" then the visitor need only dial 0601 at the dial-by-name prompt for James.

To define a directory code create a special prefix with the code:

New Special Prefix

Digit Sequence

601

Then set the action for this prefix to call a specific resident:

Action

Call a specific resident

Then choose the target resident:

Target Resident

James Smith at 123 Dover St

Finally register the code:

REGISTER

Residents can communicate these directory codes to potential visitors in advance.

These directory codes, with appropriate signage, can also help visitors reach a guard or after-hours management office.

PERMANENT ACCESS CODES

For visitors that need permanent access (e.g. sanitation services, security officers, etc.) permanent codes may be defined with a prefix as well. If this feature is enabled the first step is to determine the prefix used to access a permanent code.

As an example we will use 99 as this prefix. To register this permanent code prefix define the prefix:

Digit Sequence

99

Next set the prefix to treat this as a permanent code:



Action

Token Type

Once this prefix is registered the permanent codes can be defined as tokens of the selected type for a particular resident.

To continue with our example, we create a token for a resident (who only has a flip phone) to use as an emergency form of access:

Access Token
Description <input type="text" value="Emergency phone access"/>
Token Identifier <input type="text" value="2488"/>
Token Type <input type="text" value="Call box access code"/>

Will allow a resident to open the gate by dialing 0992488# in the virtual call box. Notice that to use a permanent code:

- The special function prefix of 0 must be entered, then
- The prefix for permanent codes (in this example 99) must be entered, finally

- The individual permanent code is entered followed by a #.

Optionally, when creating the token a list of allowed phone numbers may be provided. This limits the use of a permanent code to certain calling numbers. In our example we could limit this to just the resident's flip phone number. To do this the entire phone number (including the country code) must be entered in the "Allowed callers" section of the token:

Allowed callers

Type a number (e.g., 1-555-01XX) and press **Enter** or **Comma**.

In this case the permanent code will only work when called in from +1 561-555-1212.

RESIDENT SETTING: ENROLLMENT

Residents can manage their virtual call box settings in the **Preferences** section of the Tap2Open Dashboard.

Administrators can edit the same settings for any members of the community by going to the resident details.

The most important setting is whether a resident participates in the virtual call box listing or not:

Callbox Enrollment

 ENROLLED DECLINED

When a resident is enrolled additional options will be available.

RESIDENT SETTING: NAME

For newly created residents the virtual call box will use speech synthesis to recite the name of a resident to the guest. Speech synthesis may not pronounce a

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name as desired. Enrolled residents may record their name using the record button:



Speak the name slowly and clearly once recording starts then select this button to:



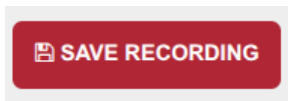
Once recorded you can hear your recording to confirm it sounds proper by playing it back:



If you need to re-record the name you can clear the recording to re-record it by selecting:



Once you are satisfied use this button to upload the name of the resident to the virtual call box:



If for some reason a saved recording is no longer desired (such as a resident who recorded something inappropriate) remove the recording and revert to a synthesized name with:



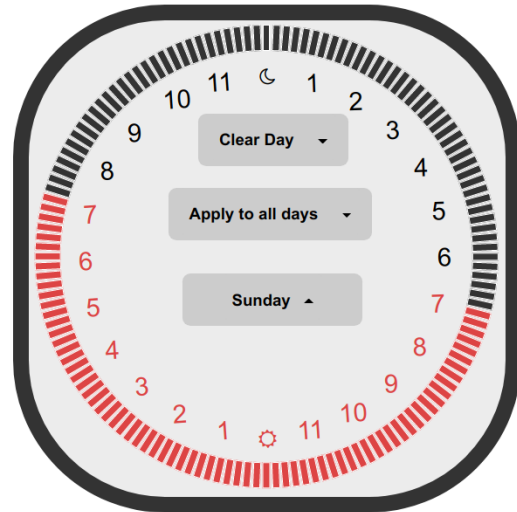
RESIDENT SETTING: DO NOT DISTURB

A resident can restrict the hours they are reachable via the virtual call box. In order to set a schedule slide the do not disturb option to **ON A SCHEDULE**.

When can guests call you?

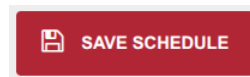


The weekly schedule can be set with a widget representing a 24 hour clock face divided into individually selectable segments:



The clock face can be adjusted for each day of the week. The clock widget displays one day at a time. To change the current day click the day selector. To select an entire hour for do-not-disturb click the hour number.

The virtual call box will not call the resident for the selected blocks of time. Once the appropriate blocks of time have been highlighted the schedule can be saved by selecting:



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Example introductory letter for residents

Dear residents of **<community name>**,

We now have a “virtual call box” at the front gate. When a (surprise) visitor wishes to reach you for access they can call the phone number posted at the gate and dial you by name. The system will then call you from the number assigned to the gate (you may wish to save this number in your phone’s contacts).

Once you answer the call the system will give you a few options – please try to listen carefully. You can press **1** to talk to the visitor just as you would with a traditional call box system. Once connected you can dial **99#** to open the gate for your visitor (should you decide to grant them entry).

By default you have been opted in to the virtual call box directory. The settings for your call box account are managed in the “*Preferences*” section of the Tap2Open dashboard app. From the preferences you can opt in or out, record your name for a more personalized touch, and even set a specific do-not-disturb schedule should you need to.

To help reduce confusion we ask that you keep the information in your Tap2Open account (such as your name and telephone number) up to date. This information is used by surprise visitors like delivery drivers when they need to reach you.

If you wish to opt out and can not use the Tap2Open dashboard app then please reach out to **<manager contact>** for assistance.



Example Sign

Need Access?

**CALL (561) 576-0197
TO DIAL BY NAME**

IF YOU DO NOT HAVE AN INVITATION

Call the number and follow the prompts to enter the resident's last name by digit.

(e.g. for Deluca press 335822)

