

QuickStart Guide

Tap2Open allows you to easily schedule your guest and vendor access without the need to contact your community guard.

The following guide will provide you with the steps you need to set up your account and start using Tap2Open at your community.

1. Welcome E-mail

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2.1 Setting Your Preferences

2.2 Invitations: Grant Temporary Guest Access

Create an Invitation

Guest Invitation

How do I schedule permanent guests?

Unscheduled/Surprise Visitors

Visitors Who Arrive Outside of Your Scheduled Times

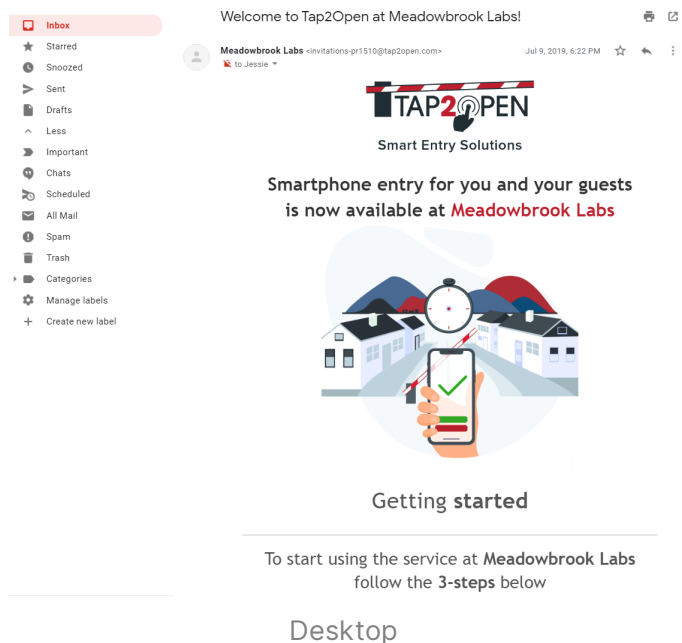
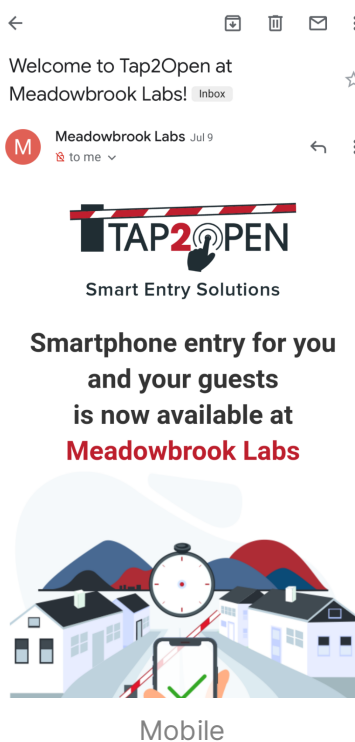
2.3 Adding Occupants

Add a Resident

1. Welcome E-mail

If you provided an e-mail address to your Community Management you will receive an e-mail titled **Welcome to Tap2Open at (your community name)**. This e-mail will provide you with the following 3-steps to set up your Tap2Open account:

1. Your username, which is required for logging in
2. A link to set your own password
3. Links to download the **Dashboard** and **Access** apps if you have a smartphone



Can't find your Welcome e-mail?

Be sure to check your *Spam* or *Junk* box. If you are still unable to locate it and have never logged in, you can visit <https://tap2open.com/login> and press the "**Forgot your password?**" link. Then enter the e-mail address that was used to set up your account. **You can also reach out to your Community Manager to confirm your e-mail address.**

1.1 Set Your Password

- Click on the link to set your password. Follow the onscreen steps to set up your password then press the confirm button to proceed.

2. SET YOUR PASSWORD

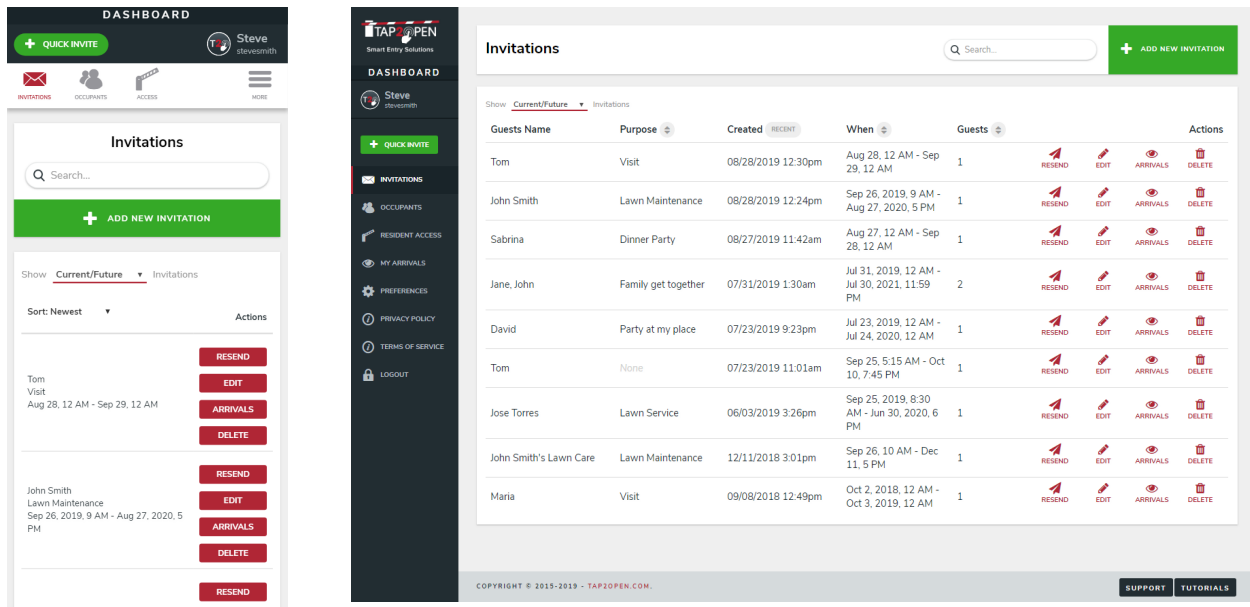
This link will expire and not work after *Jun 17 11PM*.

SET PASSWORD

2. Tap2Open Dashboard

You will be logged into the **Tap2Open Dashboard**. The Dashboard app allows you to:

- Create, send, and manage your visitor invitations
- View past arrivals
- Manage your occupants
- Modify your preferences



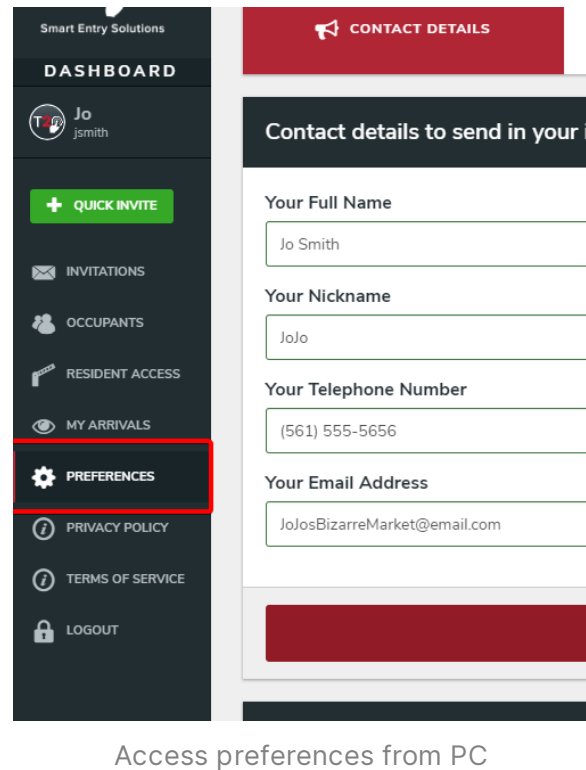
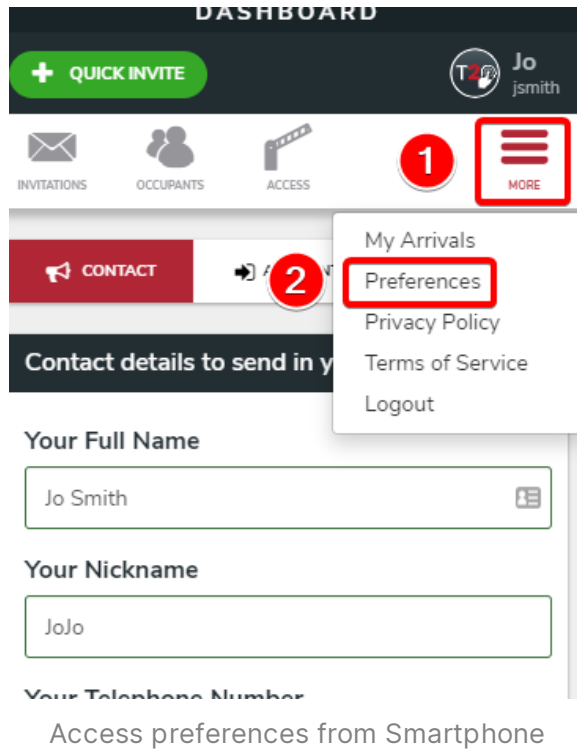
Dashboard desktop & app for smartphones



The Occupants section is only available if you are a **Supervisor User**. Some communities have this feature disabled. Please reach out to your **Community Manager** if you need assistance with this.

2.1 Setting Your Preferences

From the **Preferences** page, you'll be able to edit your contact details and update your login information.



Access preferences from Smartphone

Access preferences from PC

2.2 Invitations: Grant Temporary Guest Access

The **Invitations** page allows you create and manage invited guests. Within seconds you can schedule and pre-invite your guests to enter your community with their smartphone.

Create an Invitation

1. From the **Invitations** page press the **Add New Invitation** button.
2. In the **Purpose** field you can enter the purpose of the visit or leave the default name and press **Next**.
3. If you'd like to change the default time click **Change** and set your Start and End dates, then press **Add** then **Next** to proceed.
4. Type the name of your guest and click the **Add** button. Repeat for multiple guests then press **Next**.

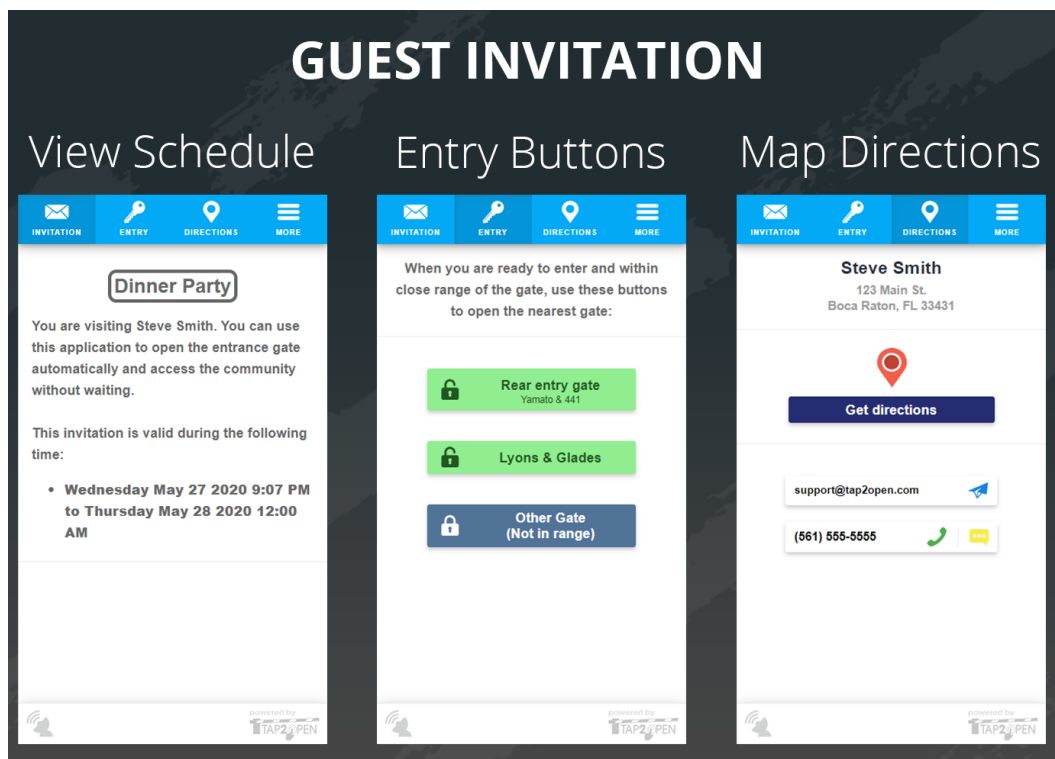
5. Although it's not required, you can choose to **Send** the invite to your guests or just press the **Finish** button to send the invitation at a later time.



Tap2Open **does not** automatically send the invitation to your guest. You will need to press the **Send** button and choose one of the provided methods to share your invitation with your guest.

Guest Invitation

After sending your guest an invitation they will have a link that takes them to their invitation. Your guest will be able to:



- View scheduled entry time(s)
- Driving directions to your home, and;

- An entry button or buttons to open shared entrances at your community once they are near the entrance

How do I schedule permanent guests?

All guests under Tap2Open enter using an invitation. Unlike many systems Tap2Open does not differentiate between permanent guests and temporary visitors, all invitations eventually expire.

For improved security, you are required to re-authorize access for your guests when their invitation has expired.

Unscheduled/Surprise Visitors

If a visitor arrives at your community and does not have a scheduled invitation, you may be able to grant them access via the **Access** app or by sending them a **Quick Invite** from the Tap2Open Dashboard.

Visitors Who Arrive Outside of Your Scheduled Times

If a visitor arrives to your community outside of their scheduled entry time this would be considered an **inactive invitation**. They will not be able to enter the community until in this case.



You can edit an existing invite from the **Invitations** page by pressing the **Edit** button on the invitation you'd like to make changes to.

2.3 Adding Occupants

Use the **Occupants** section to add or remove Tap2Open users in your household. You will be able to add additional users such as a spouse, children, or tenant.



If you do not see this option, this feature may not be available at your community.

Add a Resident

1. From the **Occupants** page, press the **Add Resident** button.
2. Enter the resident's information.
3. If the **Supervisor** option is set to **Yes**, this user will be allowed to add or remove other occupants from the property.
4. Press the **Create Resident** button when finished

The screenshot shows the 'Add Resident to Property' form. It contains several input fields: 'Full Name (Required)' with the value 'Chad Pennington', 'User Name (Required)' with 'chad.pennington7750', 'Community Role' as a dropdown menu set to 'Resident', 'Telephone Number' as '561-555-5656', 'Nickname' as 'Chad', and 'Email Address' as 'chad.p@email.com'. There are two toggle switches: 'Supervisor' (set to 'YES') and 'Send Welcome Email' (set to 'YES'). At the bottom right, there are 'CANCEL' and 'CREATE RESIDENT' buttons. Red numbered callouts are placed as follows: 1 points to the 'Full Name' field, 2 points to the 'User Name' field, 3 points to the 'Supervisor' toggle, and 4 points to the 'CREATE RESIDENT' button.

If an e-mail address was provided for the new user, they should receive a Welcome e-mail with instructions on how to set up their account.



If an e-mail address was not provided or the new user has not received the Welcome e-mail, you can set a password for the new user by pressing the **Password** button and choosing the **Set Password Directly** option.

