

# **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.

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# 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 <u>https://tap2open.com/login</u> 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

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		John Smith	Lawn Maintenance	08/28/2019 12:24pm	Sep 26, 2019, 9 AM - Aug 27, 2020, 5 PM	1	RESEND	EDIT	@ ARRIVALS	DELETE
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ewest ¥ Actions	PRIVACY POLICY     TERMS OF SERVICE	David	Party at my place	07/23/2019 9:23pm	Jul 23, 2019, 12 AM - Jul 24, 2020, 12 AM	1	RESEND	EDIT	(C) ARRIVALS	DELETE
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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.

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	My Arrivals		Jo Smith			
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Contact details to send in y	Terms of Service Logout	RESIDENT ACCESS	Your Telephone Number			
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# 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.
- 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

Full Name (Required)	User Name (Required)
Chad Pennington	E chad.pennington7750
Community Role	Telephone Number
Resident	• 561-555-5656
Nickname	Email Address
Chad	chad.p@email.com
Supervisor	Send Welcome Email
YES NO	YES NO

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.

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