



# **Resident User Manual**

CapSure Resident Manual version 5.2

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## Overview

### Terminology

Before you begin using CapSure, please take a few moments to familiarize yourself with some of the terms used throughout the system.

#### Tabs

Tabs are used to separate sections of the program. They are found at the top of the page and are visible from every screen.

#### Links

A link is a block of text that will open another page when you click on it. In CapSure, a link can be blue text that is larger than the text below it, or it can be blue underlined text.

#### Dropdowns

A dropdown is a box that contains a list of predefined data. Click on the arrowhead to drop the list down. Next, click on the item you wish to select. You may also use the arrow keys on your keyboard to move up and down through the list.

#### Text Box

A Text Box is simply a box you can type in. Use your or the TAB key to move from one field to the next. If you are using a text box to search, you will need to press the Enter key on the keyboard to start your search.

#### Column Headers

The Column Header is the row that identifies each column on the page. You may sort data on the page by clicking on a column header.

#### Bread Crumbs

Bread Crumbs are located on the left side of your screen just below the section Tabs. They show where you have been and you can click them to go back to a screen you have visited.

#### SmartKeys

SmartKeys is the CapSure term for any access control form a company uses to allow Employees access to a point of entry.

#### Add Button

The add button is a green plus sign located in the right hand corner of screens on the web that allow the option to add new contents.

#### Edit Button

The edit button is a blue pencil located to the right of a configurable feature in the web.

#### Delete Button

The delete button is a red X located to the right of a configurable feature in the web (adjacent to the edit button).

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## Section 1: Managing Your Profile

In this section we will walk you through the process of modifying your personal profile

### Resident Profile

Residents may login to the web to manage most of their personal information. However there are several things only an administrator may change: Username, Address/Property Information and SmartKey/Auto information.

### To Reach the Main Profile Page

1. Login to CapSure

**\*When you login for the first time the system will prompt you to enter a new password.**

**Detailed Help is provided by clicking the HELP button once you are logged in. On the left hand side of the screen is a link to a training video for residents.**

To edit each section follow the steps below.

### Personal Information

\*All information that is not automatically filled in is optional.

1. Click **My Profile** in the menu bar.
2. On the **Personal Info** page fill in the text boxes with your date of birth, drivers license information, access pin and offsite address information.

### Phone Numbers

1. Click the **Phone** tab to the right of the Visitors tab.
2. To add a phone number, click the **Add Button** in the upper right hand portion of the screen.
3. In the screen that pops up, fill in the phone number, extension (if applicable), and phone type.
4. When you are done, click **Save**.
5. To edit or delete a phone number, click the **Edit Button** or the **Delete Button** to the right of the screen.
  - If you choose to add multiple phone numbers you can **Change the Phone Priority**
6. To Change the Phone Priority, click the **Change Phone Priority** button:
  - Use the **Green Arrows** on the left hand side of the screen to change the phone priority.
  - When you are finished with your selections, click **Save Priority**.

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## Email

1. Click the **Email** tab to the right of the Phone tab.
2. To add an email address, click the **Add Button** in the upper right hand portion of the screen.
3. In the screen that pops up, fill in the email address, email type, and who the email address is signed to.
4. When you are done, click **Save**.
5. To edit or delete an email address, click the **Edit Button** or the **Delete Button** to the right of the screen.
6. If you choose to add multiple email addresses you can **Change the Email Priority**:
  - To Change the Phone Priority, click the **Change Phone Priority** button
  - Use the **Green Arrows** on the left hand side of the screen to change the phone priority.
  - When you are finished with your selections, click **Save Priority**.

## Family Members

1. Click the **Family Member** tab to the right of the Phone tab.
2. Click the **Add Button** to add a family member.
3. In the screen that pops up, fill in your family member's **First Name, Last Name, Relation, Sex, Occupation** and **Date of Birth**.
4. When you are done, click **Save**.

## Automobiles

1. Click the **Automobiles** tab to the right of the **Family Members** tab.
2. Residents are able to view what Automobile information is in the system. If an automobile listed on the profile is incorrect, contact your system administrator and ask them to update this information.

## Pets

1. Click the **Pets** tab to the right of the **Automobiles** tab.
2. Click the **Add Button**.
3. Fill in the text boxes with the pet's name, type, breed, color, identification or tag information, and a veterinary contact if possible.
4. When you are done click **Save**.

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## Messages

Security personnel at the gates will be able to view messages during the effective date when they look up the resident who created them.

1. Click the **Messages** tab to the right of the **Pets** tab.
2. Click the **Add Button**.
3. In the text boxes provided, enter an **Effective Date** and **Expiration Date**.
4. Enter a **Short Description** of the message.
5. Enter a **Long Description** of the message.
6. When you are done, click **Save**.

## Decals

1. Click the **Decals** tab to the right of the **Messages** tab.
2. Residents can view this information. If any decal information is incorrect, contact your system administrator and ask them to update this information.

## Associated Properties

1. Click the **Associated Properties** tab to the right of the **Decals** tab.
2. Residents can view this information. If an associated property is incorrect, contact your system administrator and ask them to update this information.

## Visitor Notification

1. Click the Visitor Notification tab to the right of the **Associated Properties** tab.
2. Residents can choose their preferred method of notification when a visitor arrives.

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## Section 2: Managing Your Visitor List

In this section we will walk you through the process of managing your visitor list

### Scheduling Visitors Online

#### Schedule a One Time Visitor

One Time visitors are purged from your authorized visitor list after they are expired. They can be rescheduled at a later date if necessary but they will not remain on your authorized list.

1. Click the **Visitors** tab.
2. To add a new visitor, click the **Add Button** in the upper right hand portion of the screen.
3. Enter the **Frist Name, Last Name**, and if the visitor is with a company enter the **Company Name** in the field provided.
4. Select the **Visitor Type** from the dropdown box.
5. Select the **Schedule Date/Time** of arrival, then the **Expiration Date** that their pass should expire.
6. Choose the **Destination** in which the Visitor should go
7. If there are any comments you wish to include, you can do so in the **Comments** field.
8. You may also choose **Additional Options**:
  - If you wish to **Deny** a visitor permanently to your visitor list, click the **Deny** button.  
{Please be aware, that another resident within your community will still have access to schedule this visitor. To block this visitor permanent access to your community you must contact your System Administrator}
  - If your visitor has a recurring schedule, such as a domestic visitor that arrives every Wednesday, you can select the **Recurring schedule** and then choose your preferences.
9. Click **Save & Exit** when you are finished.

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## Create a Permanent Visitor

Permanent visitors are always authorized to enter the community. These visitors are not automatically purged from the system; they must be removed manually if they are no longer allowed access.

1. Click on the **Schedule New Visitor(s)** link on the home page.
2. In the provided fields type in the visitor's **First** and **Last Name**, select **Permanent** from the Visitor Type dropdown.
3. Next, choose the **Schedule Date, Expiration Date, Schedule time** and **Destination** from the dropdown list and click **Add To List**.
4. When you are done, click **Save**.

## Reschedule a Visitor

You may update the schedule date and time for any visitors on your authorized visitor list.

1. Click the **Visitor** tab on the **My Profile** page.
2. Click the **Edit Button** to the right of the visitor you want to reschedule.
3. Update the **Expiration Date, Schedule/Time** and **Destination**.
4. Click on the **Save** button at the bottom of the page.

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## Section 3: Troubleshooting

In this section we have listed some typical questions and/or problems you may encounter as well as general troubleshooting procedures. The majority of the time a problem occurs when the correct steps are not followed or the internet is down. If the problem persists please document all steps taken (include breadcrumbs if applicable) and record any errors received then contact your system administrator. It is important that you provide as much detail as possible as this will help expedite the support process.

- **I cannot get to the login site**
  - Are you able to open Google or Yahoo?
    - If the answer is no you have an internet connection problem.
  - Are you typing in the correct site address (i.e. enterprise.capsure.com)?
  
- **I am getting an error**
  - What does the error say?
  - Repeat the steps you took and make sure everything is being done correctly.
  
- **My information is out of date**
  - Please refer to Section 1: Managing Your Profile for instructions on how to update your information.
  
- **I cannot add a visitor**
  - Repeat the steps you took and make sure everything is being done correctly.