SITE CAPTURE

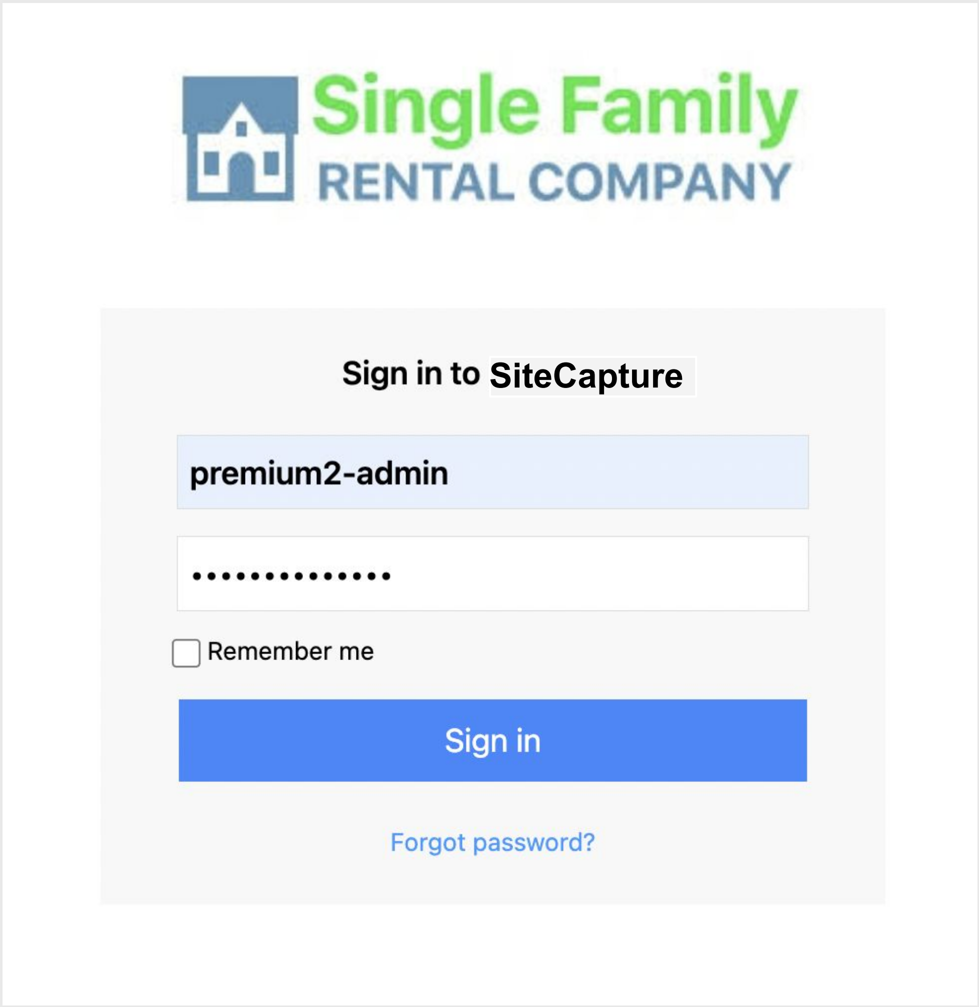
Getting Started Guide for Portal Admins

Logging In

Go to the link provided to you (or app.sitecapture.com) and log in using your portal admin username and password.

- If you do not remember your password, click the blue "Forgot Password" link to reset your password.

- If you do not know your username, please email support@sitecapture.com.

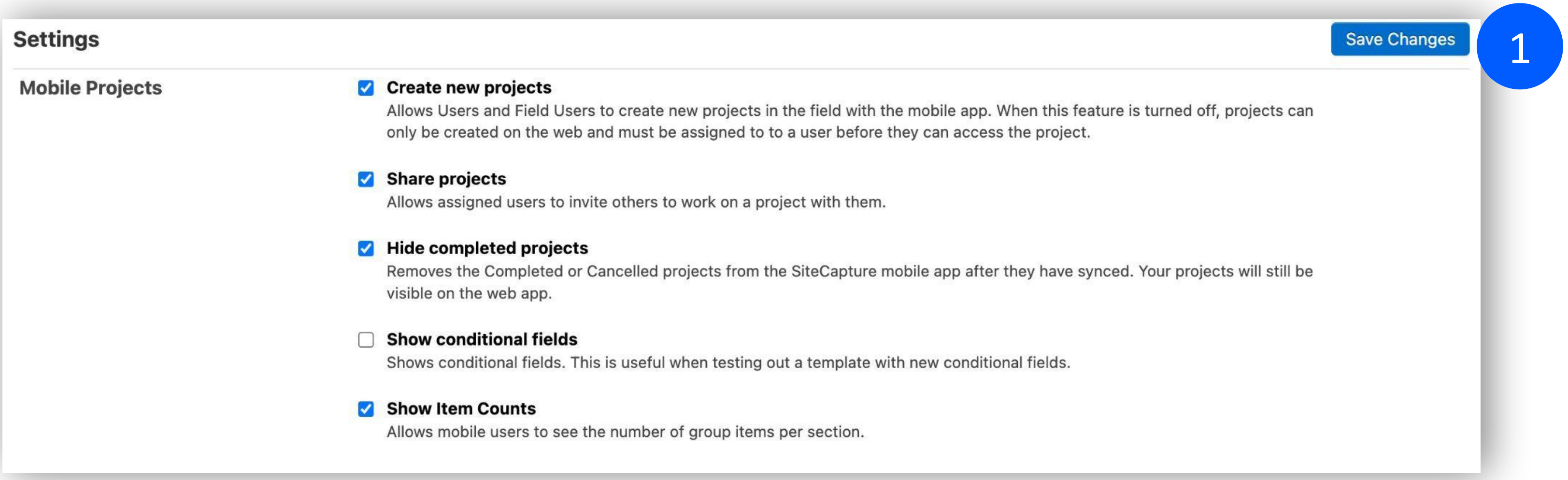


Admin Settings – Mobile Projects

To access your SiteCapture Admin Settings, click on the gear in the top right.

- To make changes to a setting, check or uncheck the box next to the setting and press the Save Changes button in the top right corner (1). In the Mobile Projects section, you can manage what your users have access to on mobile.

Create new projects: This allows Users to create new projects in the field with the mobile app. When this feature is turned off, projects can only be created on the web and must be assigned to a user before they can access the project.
Share projects: Allows assigned users to invite others to work on a project with them.
Hide completed projects: Removes projects with a status of Completed or Cancelled from the SiteCapture mobile app after they have synced. Your projects will still be visible on the web app.
Show conditional fields: Shows conditional fields in italics before the conditions have been met. This is only on the web app. This is useful when testing out a template with new conditional fields.
Show item counts: Allows mobile users to see the number of group items per section.



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Admin Settings – Mobile Photos

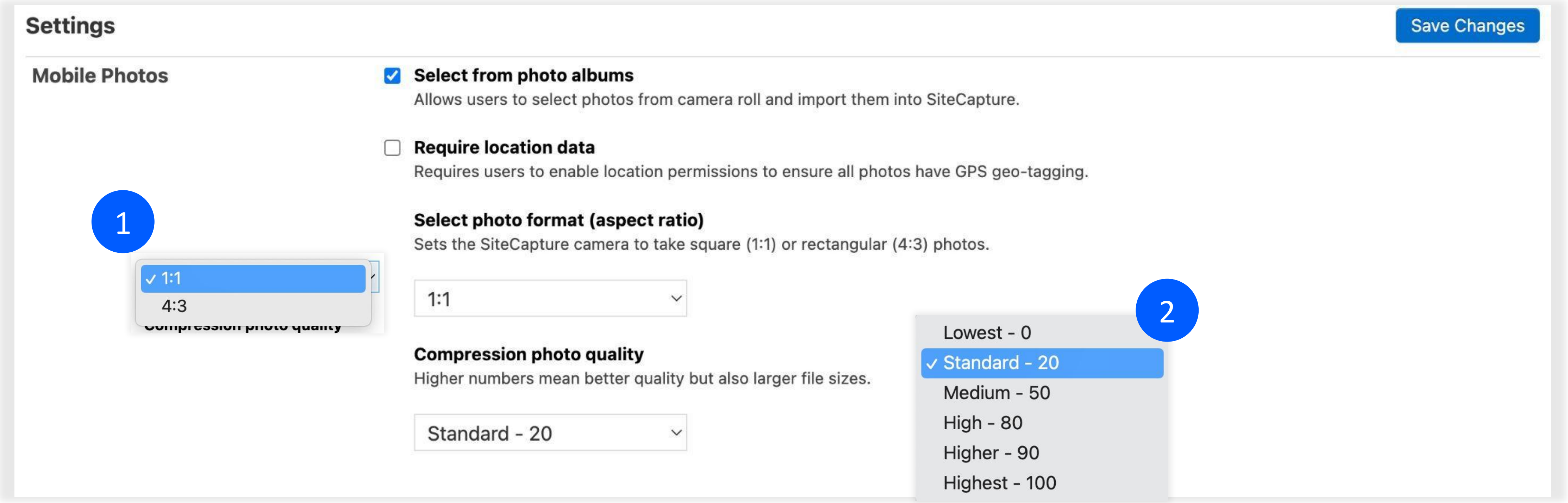
In the Mobile Photos section, you can manage mobile photo settings for your users.

Select from photo albums: Allows users to select photos from the camera roll on their mobile device and import them into a project in the SiteCapture mobile app.

Require location data: Requires users to enable location permissions to ensure all photos have GPS geo-tagging.

Select photo format (aspect ratio): Set the SiteCapture camera to take square (1:1) or rectangular (4:3) photos (1).

Compression photo quality: Set the photo quality for photos. Higher numbers mean better quality but also larger file sizes (2).



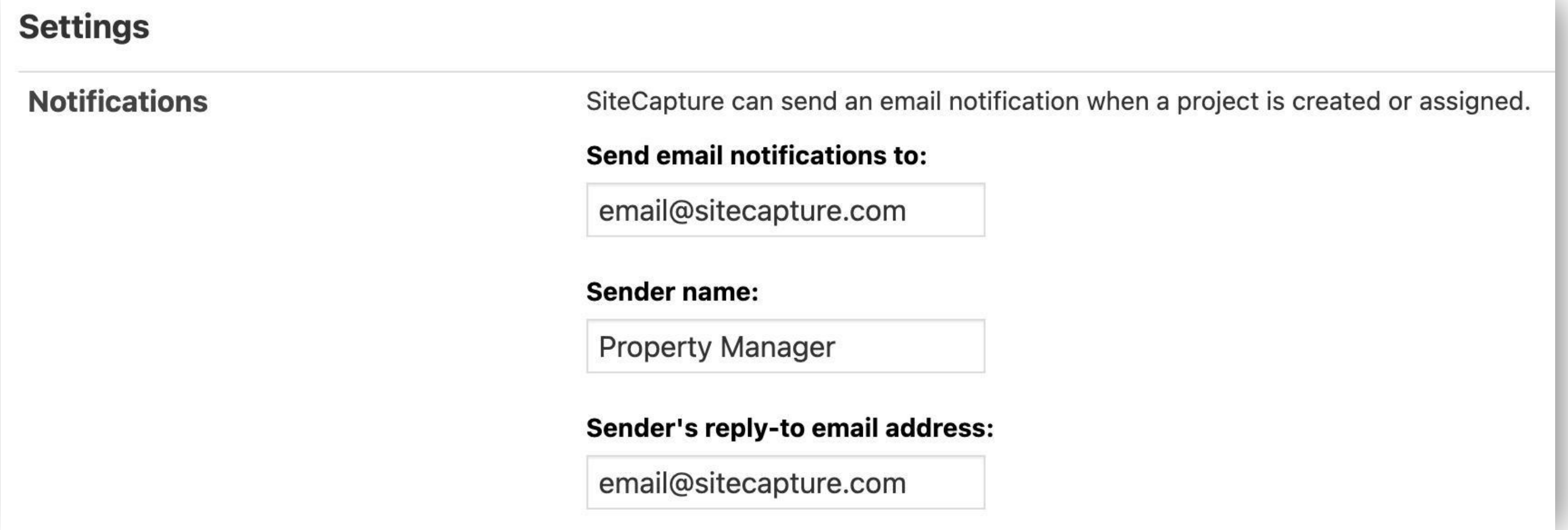
Admin Settings – Notifications

Portal admins can turn on notifications, manage the sender name and reply-to email address in email notifications, and add a dashboard message.

Send email notifications to: Enter an email to be copied on any notifications in this box. These emails are usually a portal admin or administrator's email OR it could be a group email address your company uses.

Sender name: The sender name can be your company name or the name of the person who manages the company.

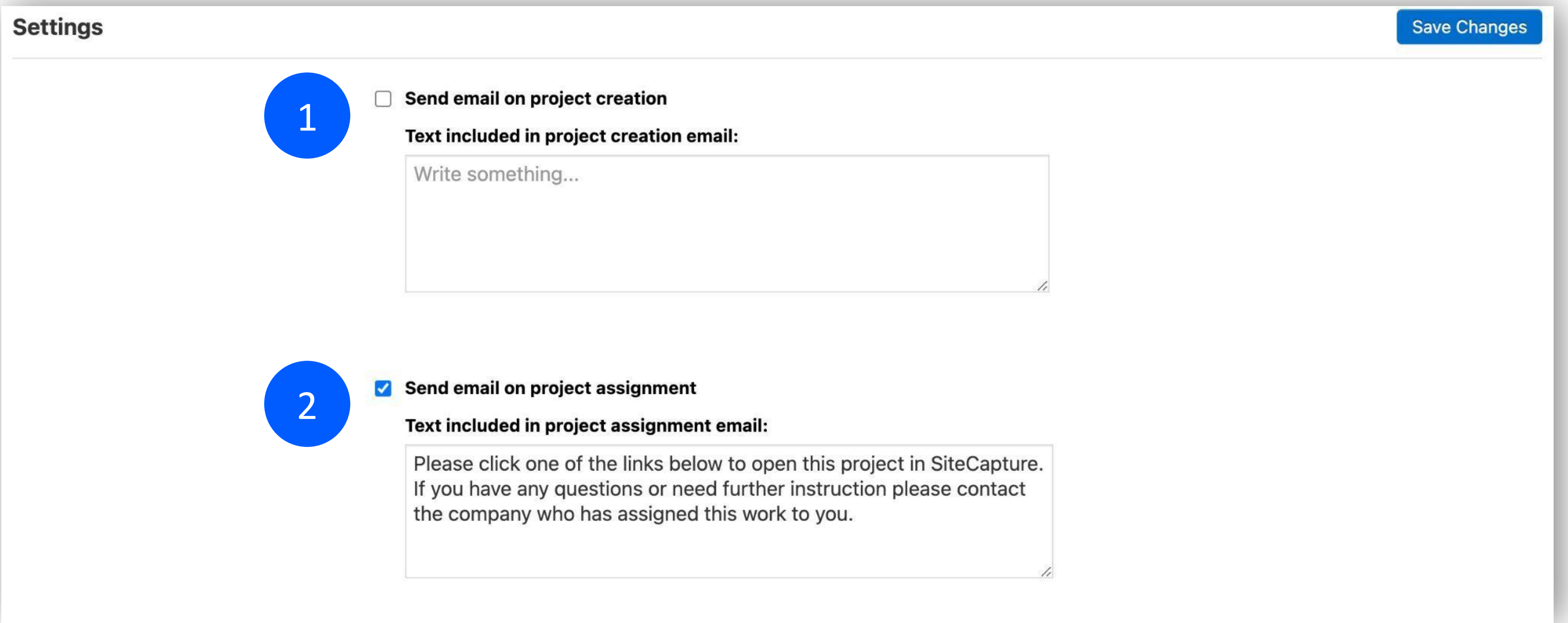
Sender's reply-to email address: If the "Sender's reply-to email address" is left blank, users will receive notifications from do-not-reply@sitecapture.com by default. If you would like your users to be able to reply to your own email, please fill this in with the appropriate email address.



Admin Settings – Notifications

- **Send Email on Project Creation (1)**: Check this box if you would like an email sent to the user when a new project is created. Enter text for the custom email. Click "Save Changes".
- **Send Email on Project Assignment (2):** Check the box if you would like an email sent to the user when a project is assigned to them. Enter text for the custom email. Click "Save Changes".

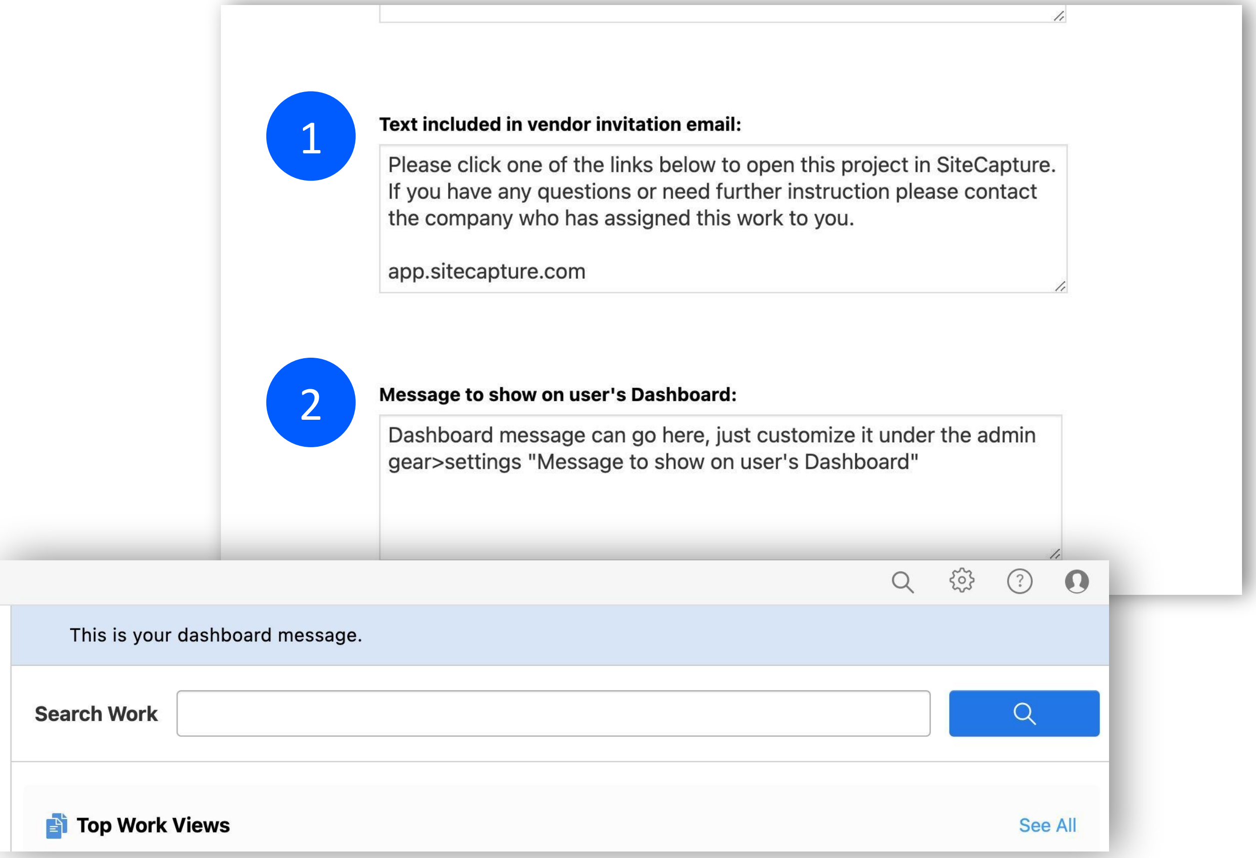
Note: Email notifications will be sent when a project has been re-assigned. The original assigned user or company will get a notification that the work was re-assigned, and it will include the project id.



Admin Settings – Notifications

- **Text included in vendor invitation email (1)**: If your SiteCapture subscription includes vendor management, enter the message you would like Vendors to receive in their vendor invitation email. This will be sent after you set up the vendor in SiteCapture.

- **Message to show on user's dashboard (2)**: The dashboard message will display to users when they log in on the web app.



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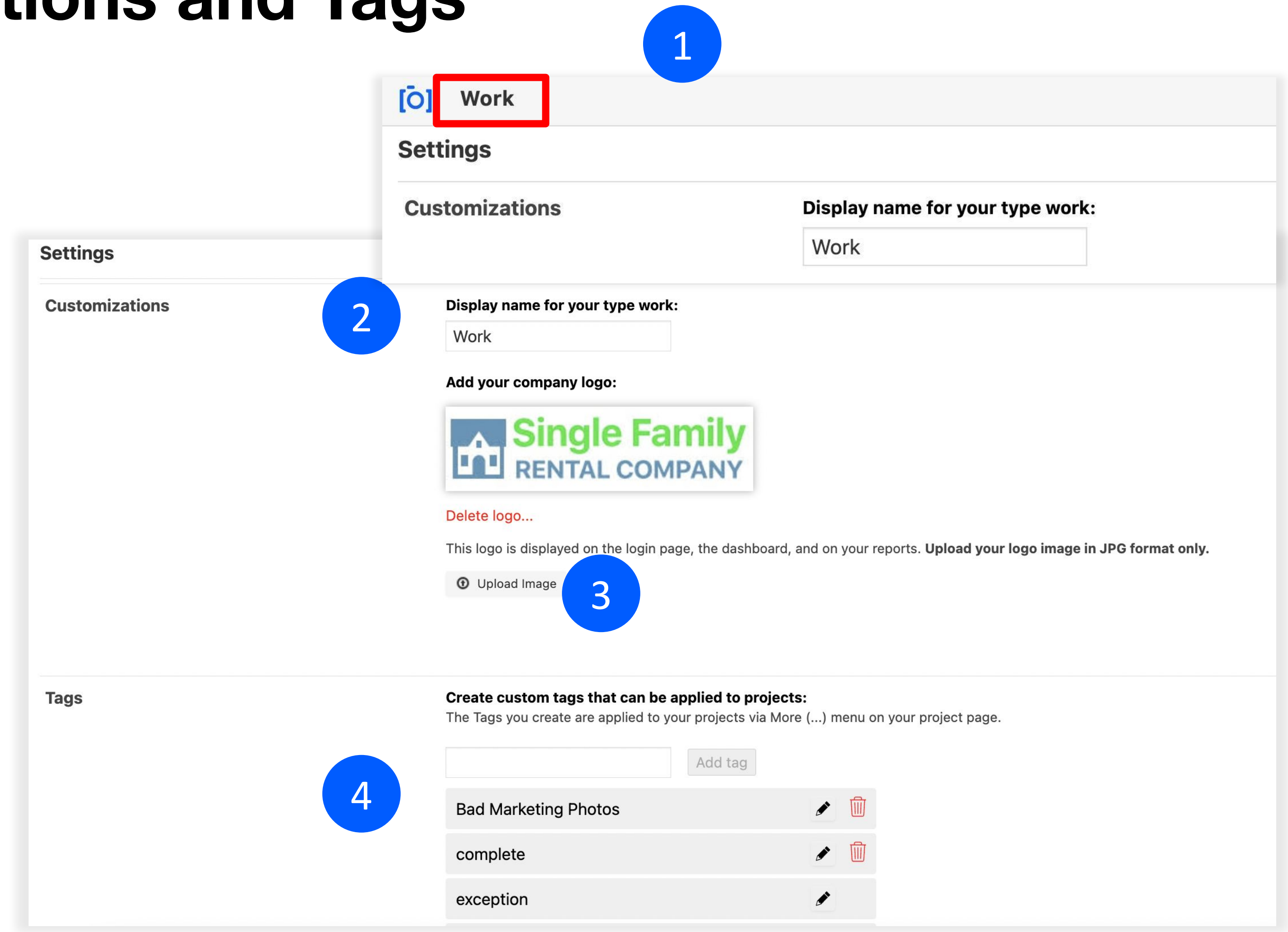
Admin Settings – Customizations and Tags

Portal Admins can manage the name for the work link displayed in the top toolbar (1) and add a company logo.

- To change the name for Work in the top toolbar, type the new name and click Save Changes in the top right (2).
- Upload a company logo by clicking the Upload Image and selecting your company logo (3). This logo is displayed on the login page, the dashboard, and in your reports. The file must be a JPG format.

Portal Admins can create and edit tags that can be applied to projects. *Only Portal Admins, Managers, and users who have admin access to a project can add tags to a project.

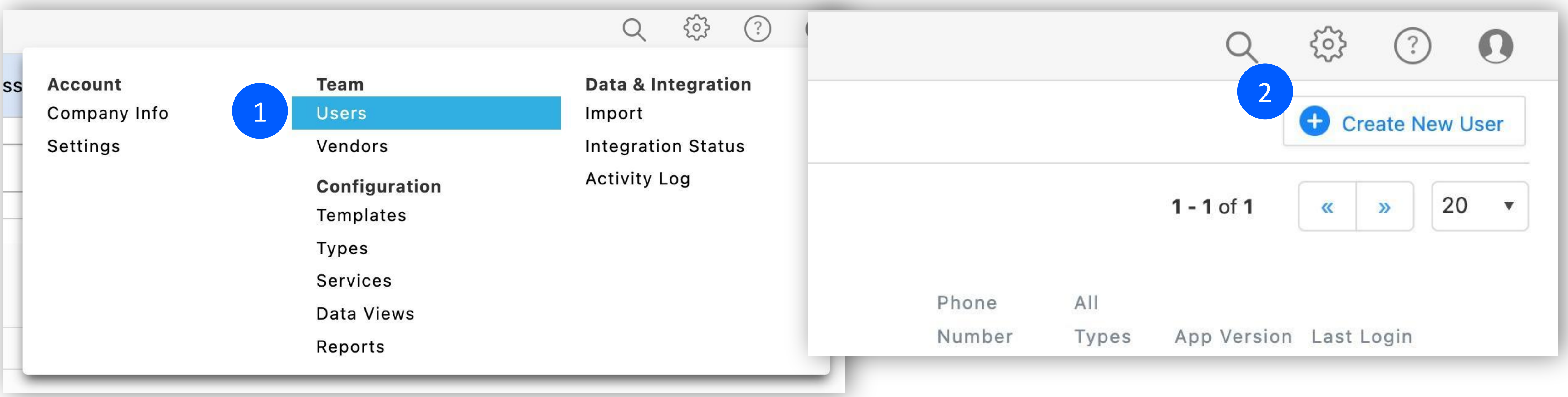
- To add a tag, type the name of the tag in the box and Add Tag. To edit a tag, click the pencil icon on the right and make the edit, click save. To delete a tag, click the trash bin icon (4).



Creating Users

As a Portal Admin, you can create Manager, Field User, and Customer users. *Managers also have permission to add users. Each user role has different permissions. Click here for a full list of user roles and permissions.

- To create a user, click on the **admin gear** in the top right and select **Users** (1).
- On the User page, click **Create New User** and fill in the information (2).

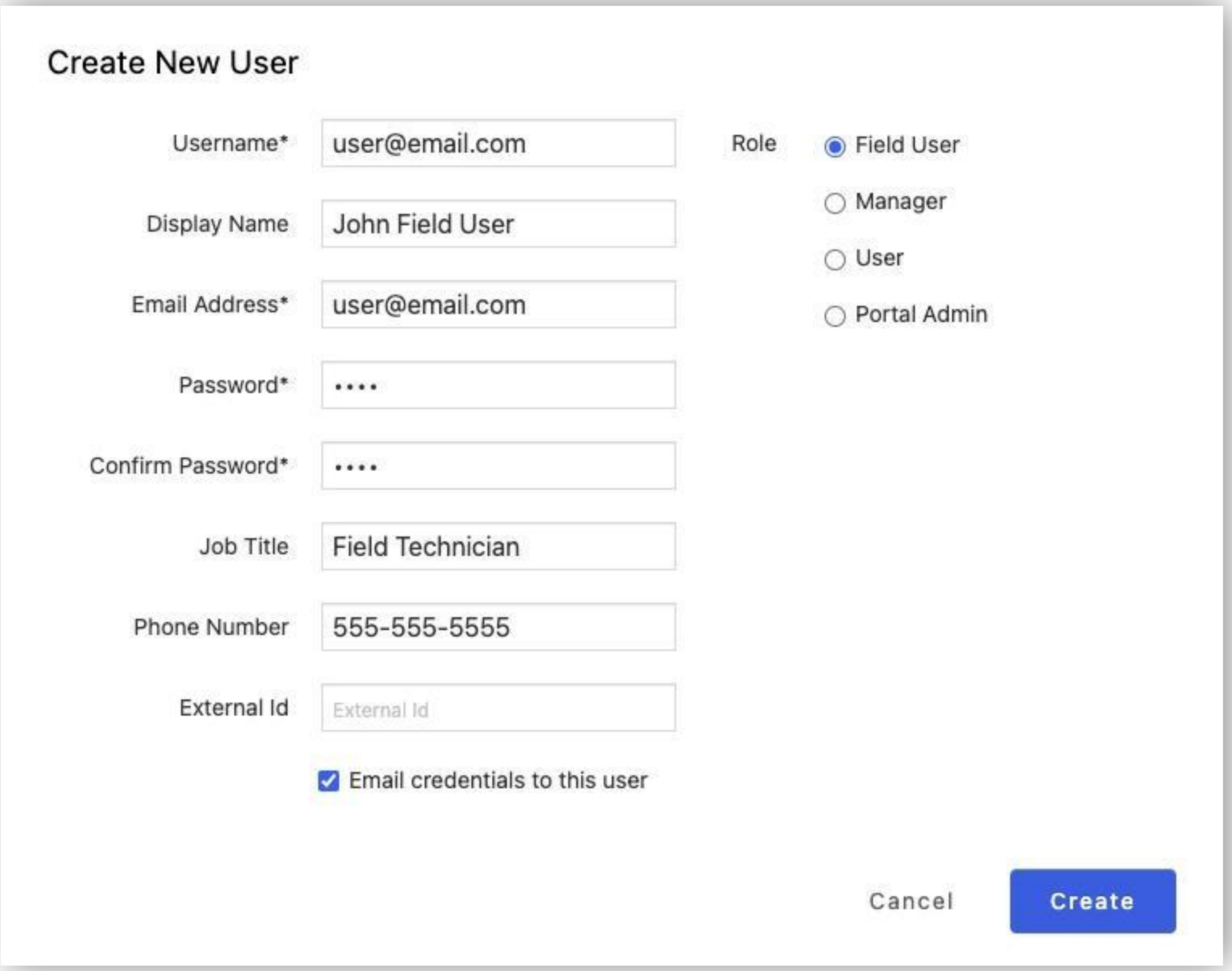


Creating Users

- **Usernames within SiteCapture must be unique**. We recommend using the user's email address. Enter a unique password. (The user can change later with the forgot password link.)

- Add the user's email and any other information you have, like job title, and phone number. **Click Create**.

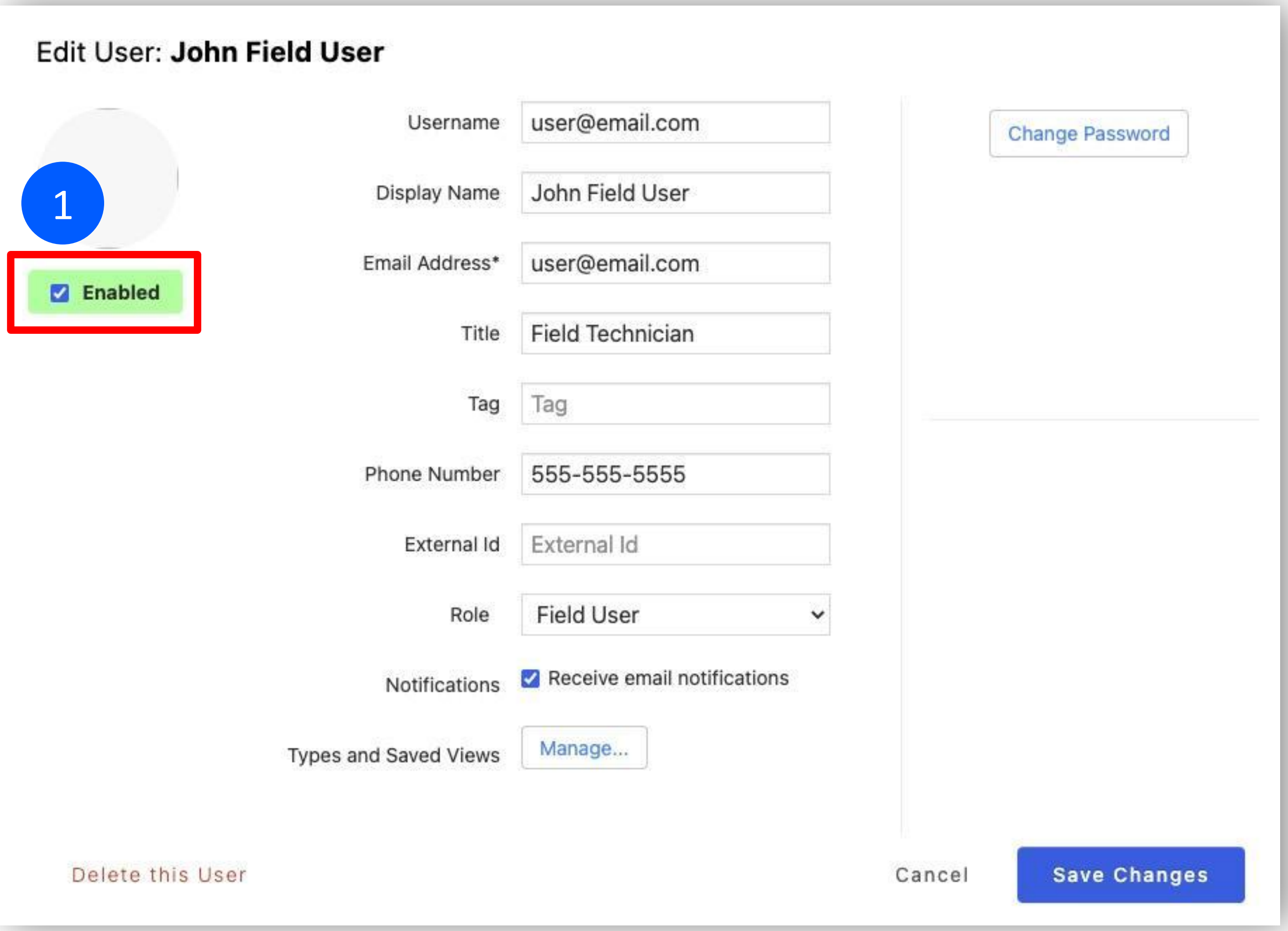
The user has now been created and you will see them in the list of users.



Disabling Users

SiteCapture highly recommends disabling users instead of permanently deleting them. Any disabled users in your portal will not count towards your total amount of users allowed.

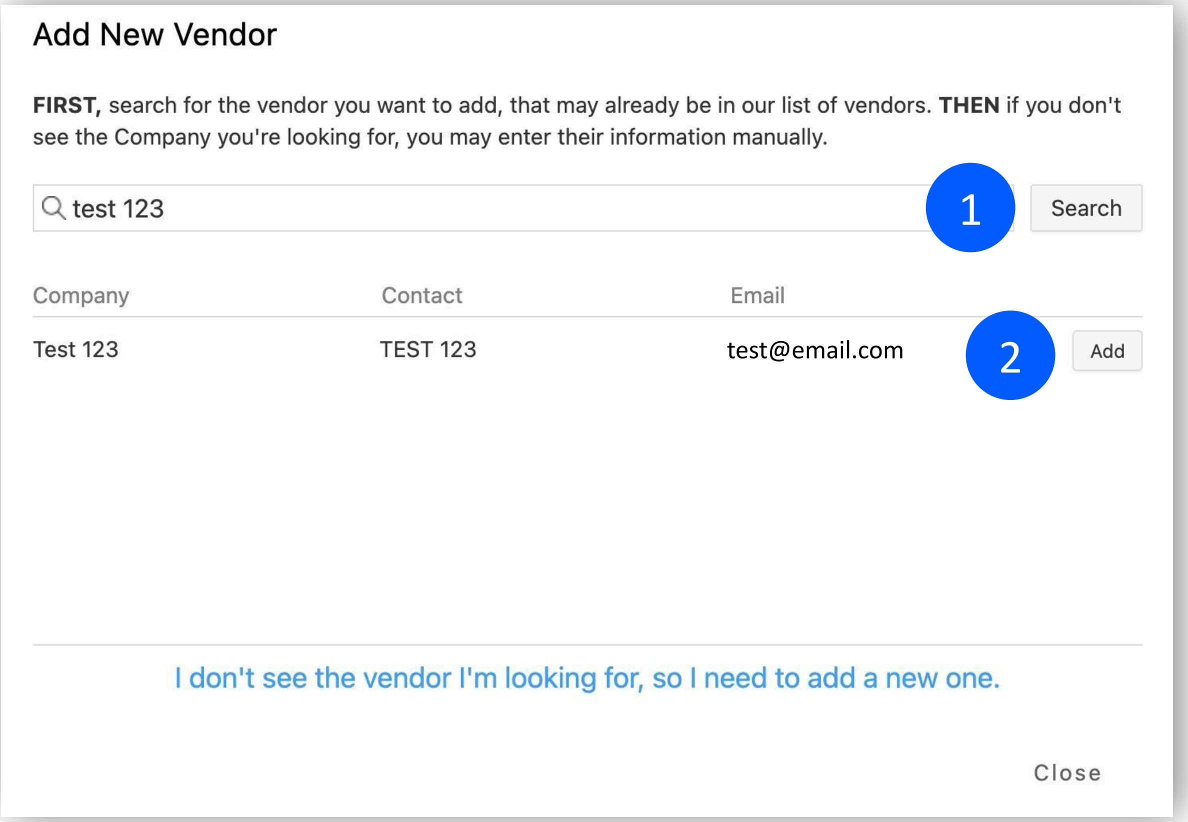
- Portal admins can disable or delete users in the web app portal. Click on the Admin gear in the top right corner and select Users.
- Click on the user you wish to disable
- Uncheck "Enabled" to disable the user (1). We always recommend disabling users instead of permanently deleting users. Disabled users do not count towards the number of users allowed.



Find and Add a Vendor

If your subscription of SiteCapture includes vendor management, you can find and connect with vendors.

- To find and connect with a vendor that is already in SiteCapture, click the admin gear in the top right and select Vendors. Click the Find and Add A Vendor button.
- Enter the Vendor’s company name, contact name or contact email address and click search (1). *We recommend typing the first few characters of the name or email.
- If you see the vendor in the list of search results, click the Add button to the right of their name (2).



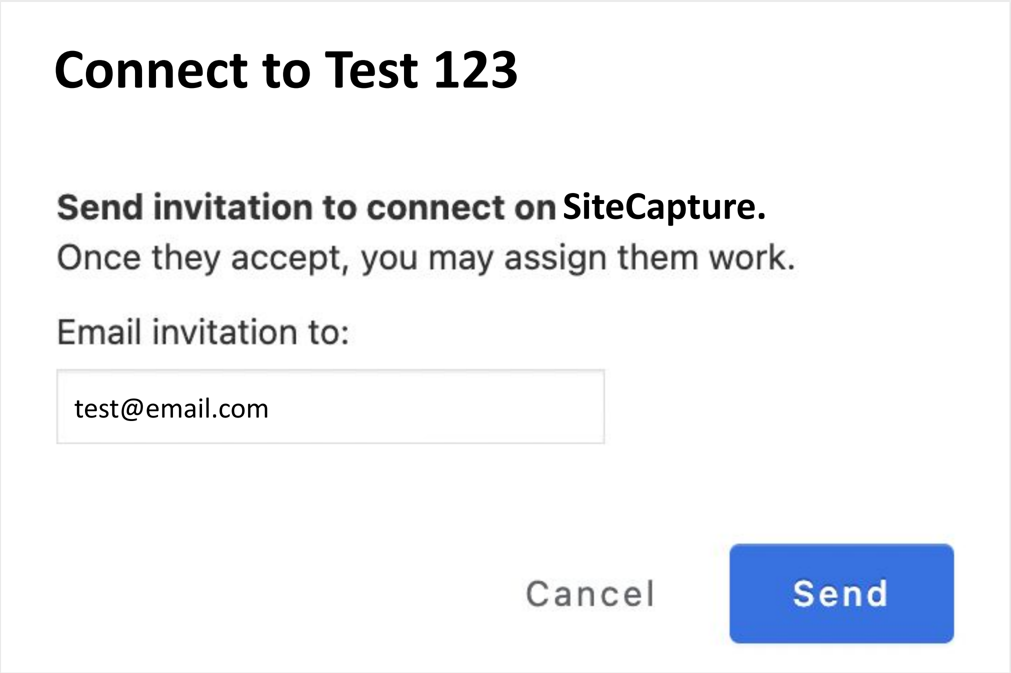
*Professional/Premium Feature Only.

Connect with a Vendor

- The Vendor's record will be created, and you will need to Connect with the vendor.

- To connect with the vendor, click on the Connect to Vendor button in the top right of the vendor's record.

- Confirm the vendor's contact name and click Send. An email will be sent to the Vendor to connect on SiteCapture. Once they accept the invitation you will be able to assign items to them in SiteCapture.*The vendor's email will likely be the same email that is already in the vendor record.

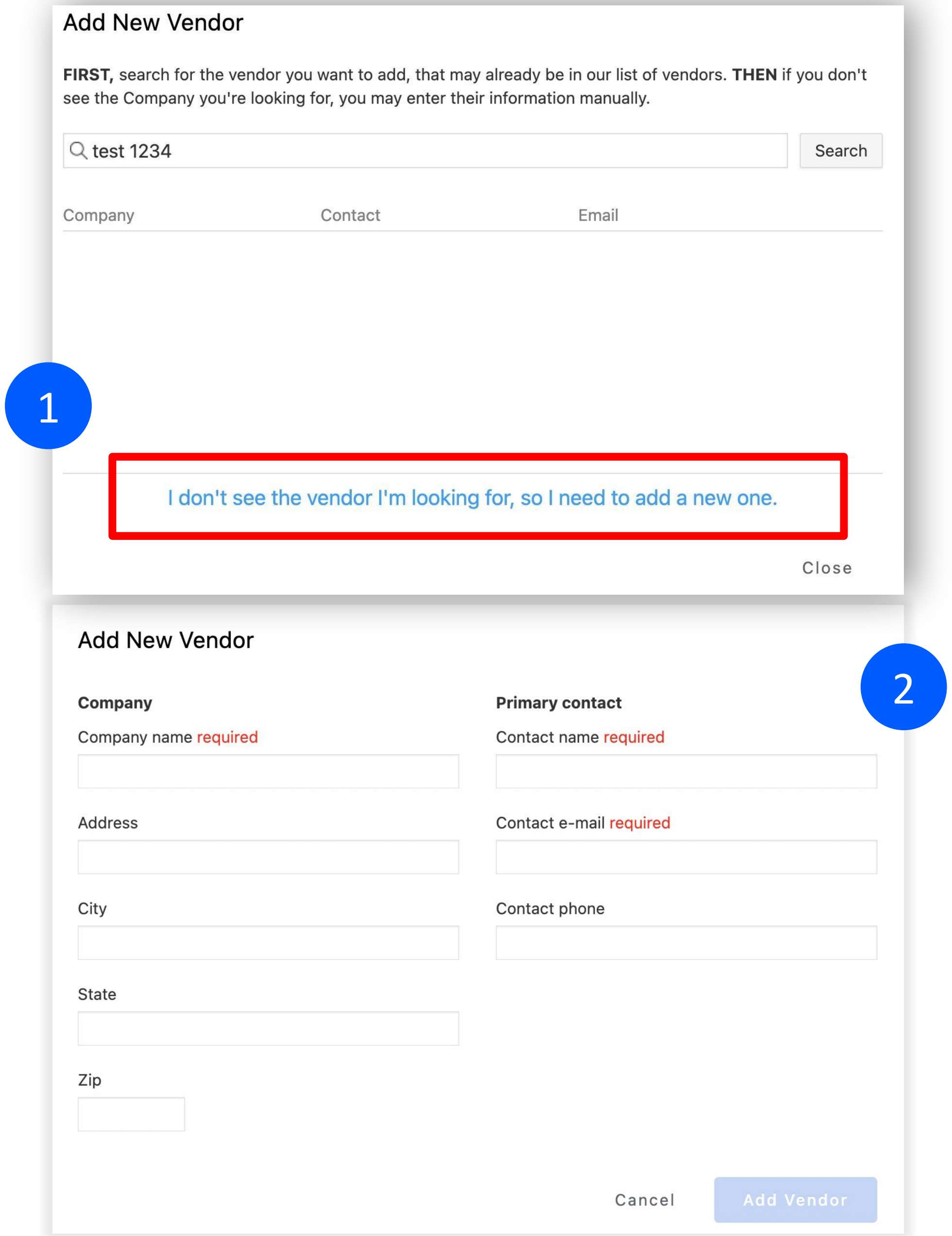


*Professional/Premium Feature Only.

Add a Vendor

- If you tried to find the vendor in the Find and Add Vendor but they were not in the list, you can add a new vendor by clicking the Add New Vendor button at the bottom (1).
- Enter the Vendor's Name, Contact Name, and E-mail. The phone number and address information are optional. Click "Add Vendor" when done (2).
- The Vendor’s record will be created, and you will need to connect with them. Click on "Connect to Vendor".

*Professional/Premium Feature Only.



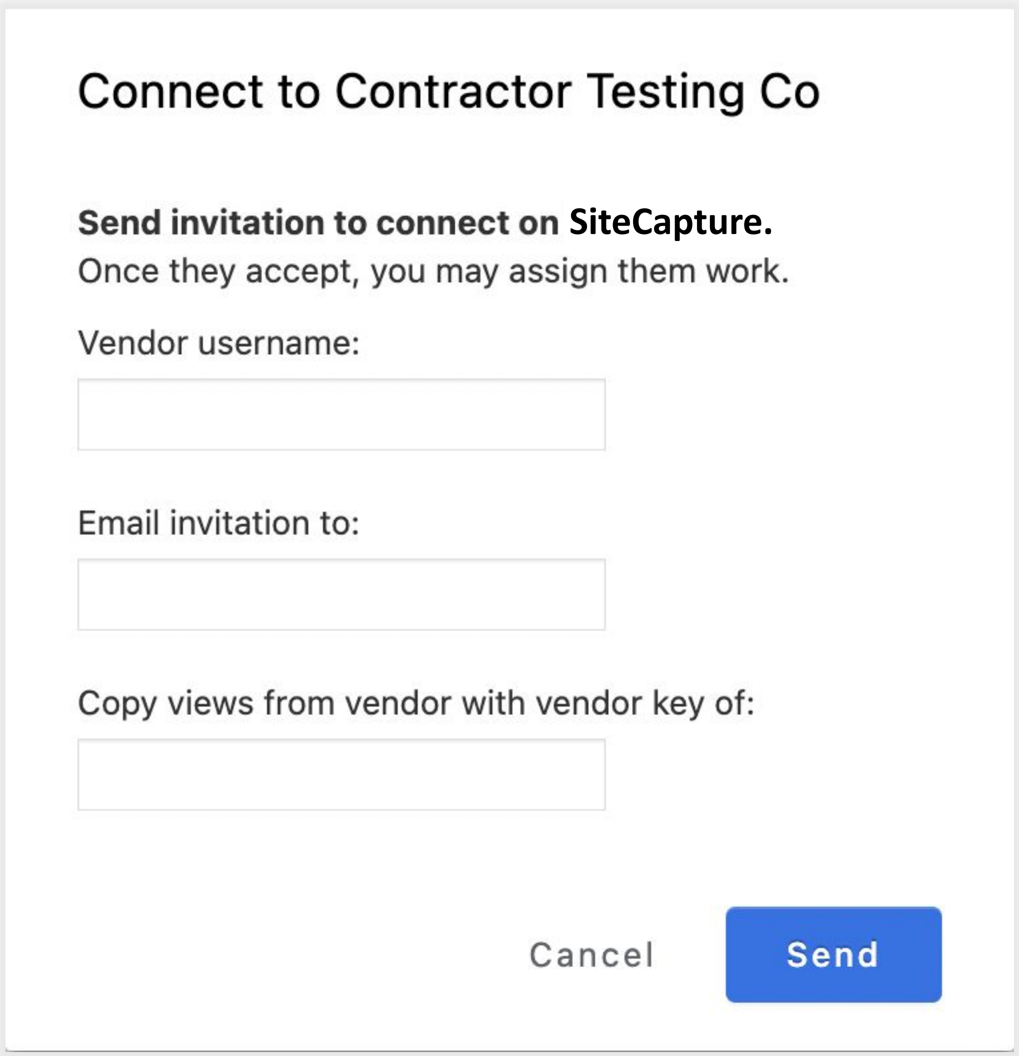
Add a Vendor

- On the next screen, edit the vendor's username and email if needed. We recommend using an email address for the Vendor username. Usernames cannot be duplicated across SiteCapture, so if you have a user who has already been in SiteCapture with their email address, then that user will need to have a unique identifier in their username.

- Click Send. An email will be sent to the Vendor to connect on SiteCapture. Once they accept the invitation you will be able to assign items to them in SiteCapture.

Learn more about setting up and managing vendors here: Vendor Management

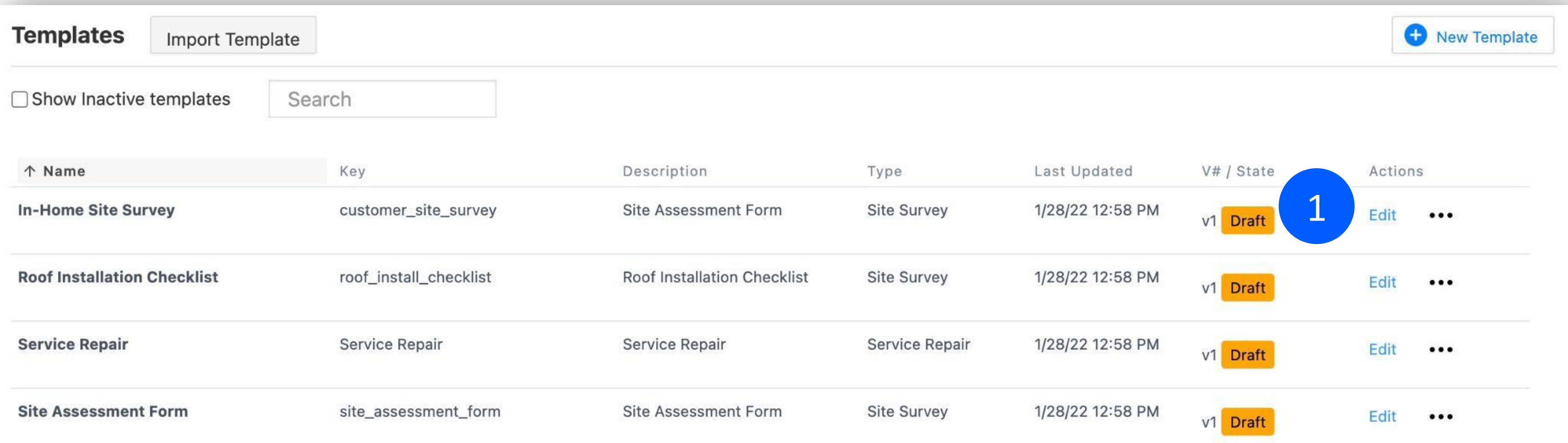
*Professional/Premium Feature Only.



Managing Templates

With SiteCapture template editor, you can create and customize templates to capture all the information you need!

- To review, create, and edit templates, click the admin gear in the top right and select Templates.
- Here you'll see a full list of templates currently available in your SiteCapture portal (we have provided you several examples).
- To create a new version of a template, simply click edit to the right of the template name(1). This will create a new version of the template you can edit.

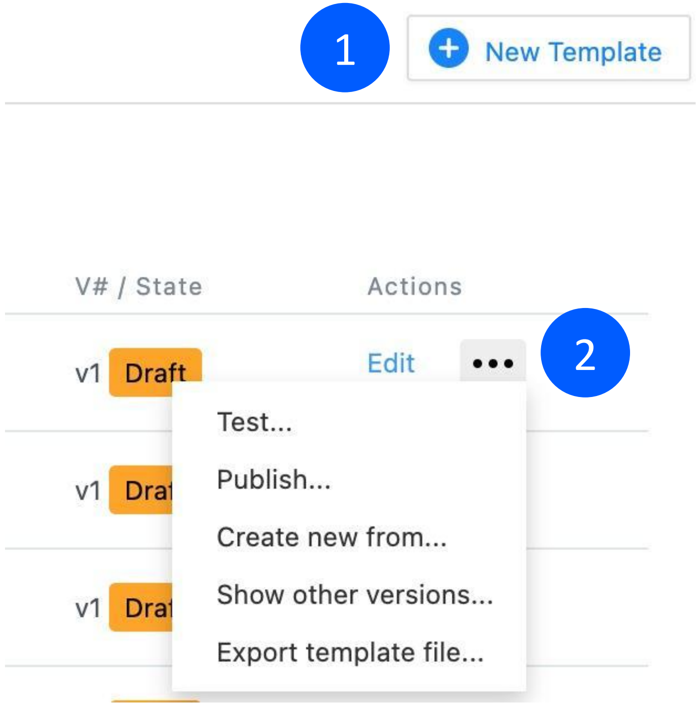


Managing Templates

- You can also create a new template by either creating a clone of an existing template or clicking the New Template button on the right (1).

- To create a clone, click the three dots to the right of the template you want to clone and select Create new from… (2).

- Once you have your new draft or clone ready, you can edit your template!



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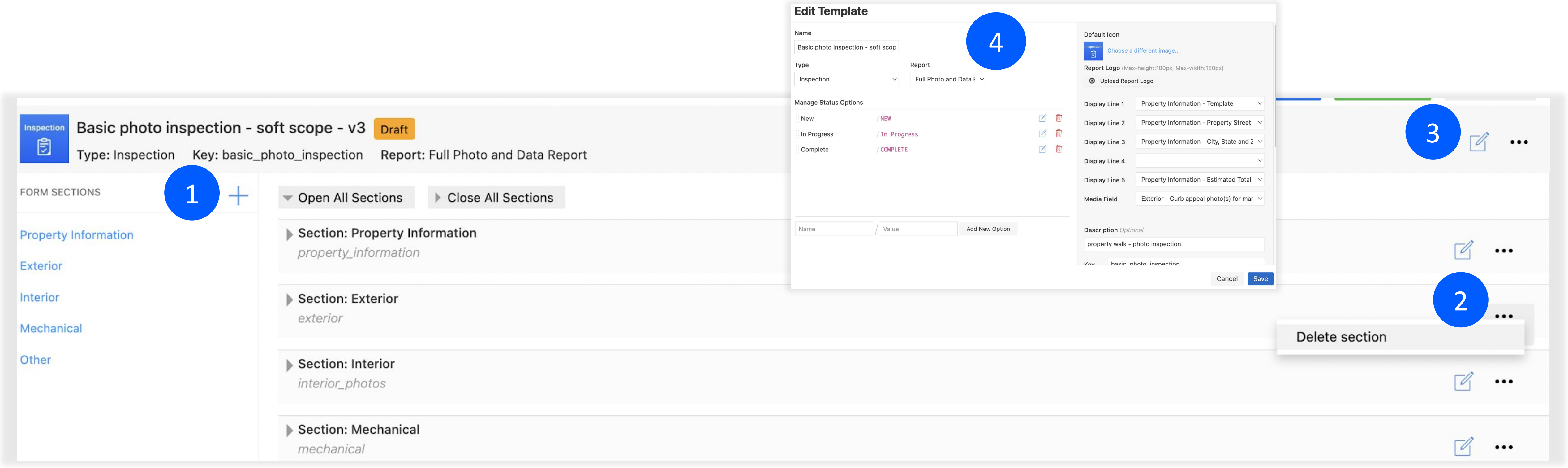
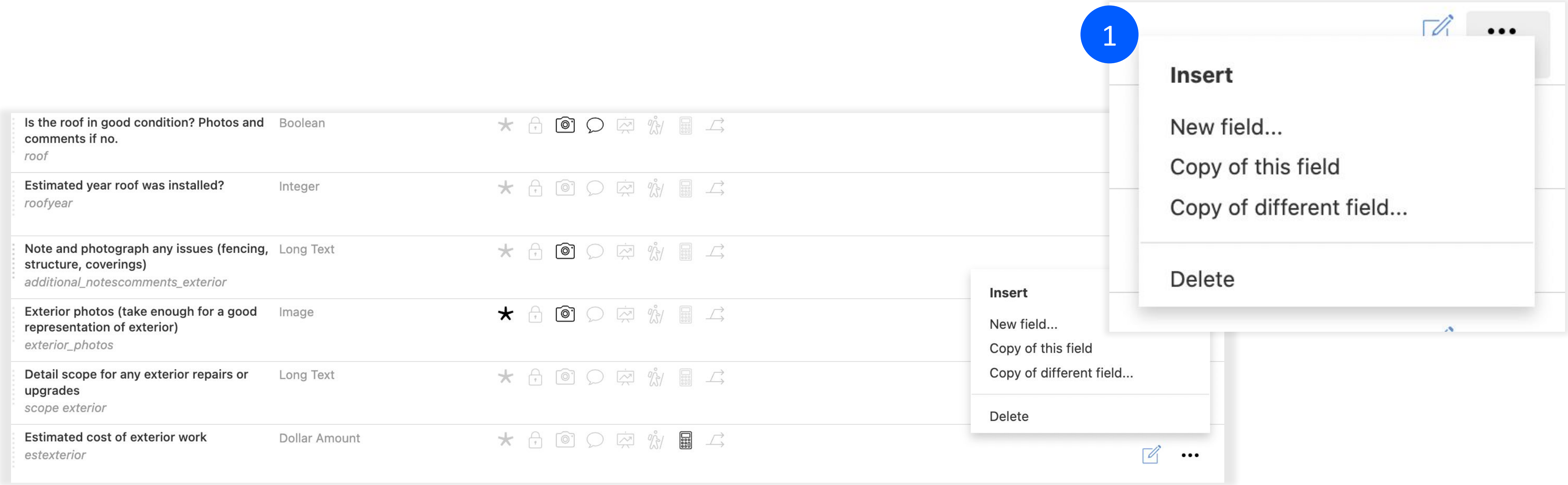
Managing Templates

- On the left, you'll see a list of the sections in your template. To add a new section, click the + sign at the top (1). To delete a section, click the three dots to the right of the section and click Delete section (2).
- Click the edit box (3) to the right of the template name to view and edit template settings (4).
- Learn more about template settings here [Template Settings]



Managing Templates

- To edit a field, click the edit box to the right of the field name.
- To make a copy of a field, click the three dots on the right and select Copy of this field... To add a new field, select New field… To delete the field, select Delete (1).
- Learn more about field types, settings, and managing templates here: [Managing Templates]()



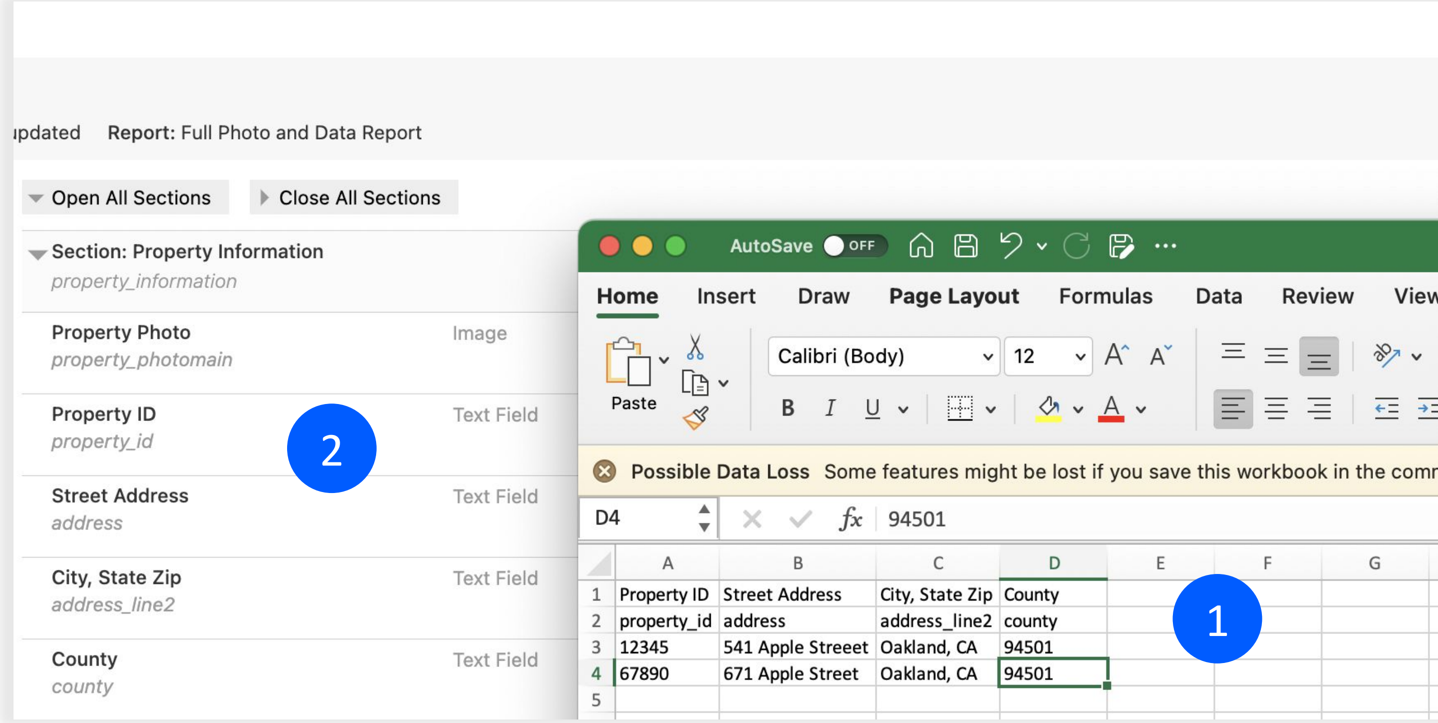
Importing Containers (Properties, Job Sites, etc.)

If you have a standard or premium subscription of SiteCapture, you likely have containers. For some clients these are properties, but they can be whatever you like. To easily set up all your containers in SiteCapture, you can create a .csv spreadsheet of your property and import them into SiteCapture.

- Before you build your import, be sure to review your Container template and make any necessary changes.

- In your .csv file, create two rows. The first row is the field name (from your container template) and the second is the field key (from your property template) (1). The field keys must match exactly what is in your container template (2).

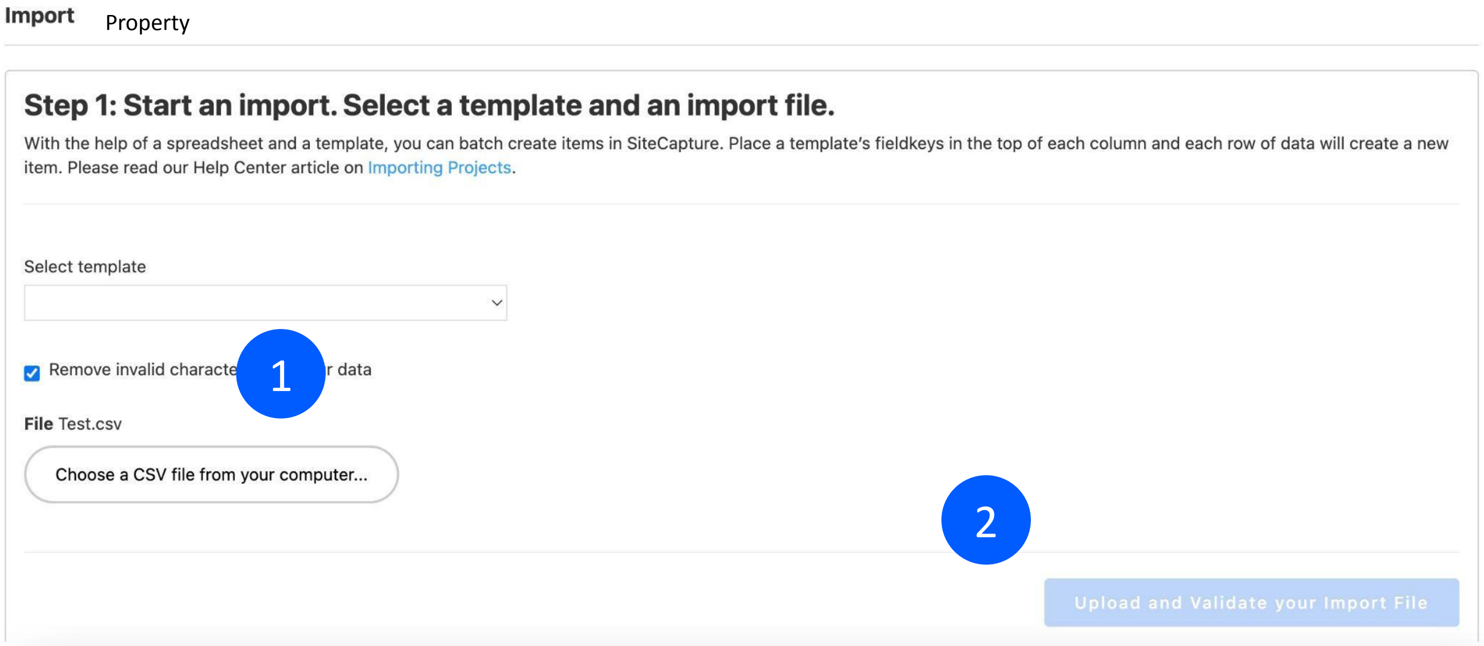
- The following rows will be your container data. Make sure the appropriate data is in each row



*Professional/Premium Feature Only.

Importing Containers

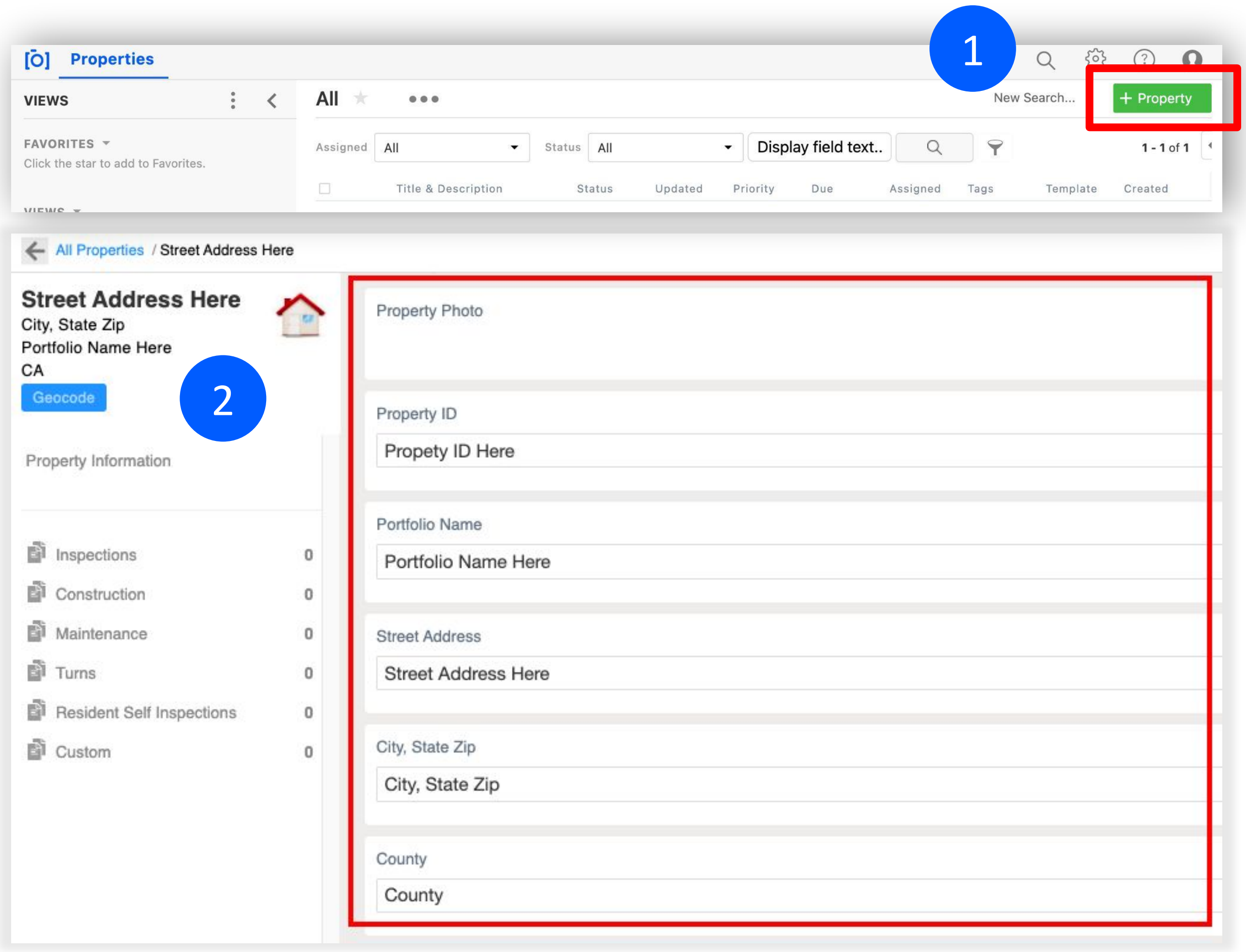
- When your .csv container file is complete, click on the admin gear in the top right and select Import.
- On the import page, select the container name type (for example, Properties) in “What would you like to import?”. In the template dropdown, select your container template. If you would like to automatically remove invalid characters from your spreadsheet so the import works, check the box next to that option (1). Click the Choose a CSV file from your computer… button and select your file. Click Upload and Validate your import file (2).
- Your containers will be created, and you can access them by clicking the Container name type in the top toolbar. It will be the left tab.



*Professional/Premium Feature Only.

Creating a Container and Attached Work

- To create a container and attached work click on the container name/type in the top toolbar. *If you already imported your containers you will see those containers.
- Create a new container by clicking on the green button (1).
- Select your template and then click "Create".
- Fill out the information fields (2).

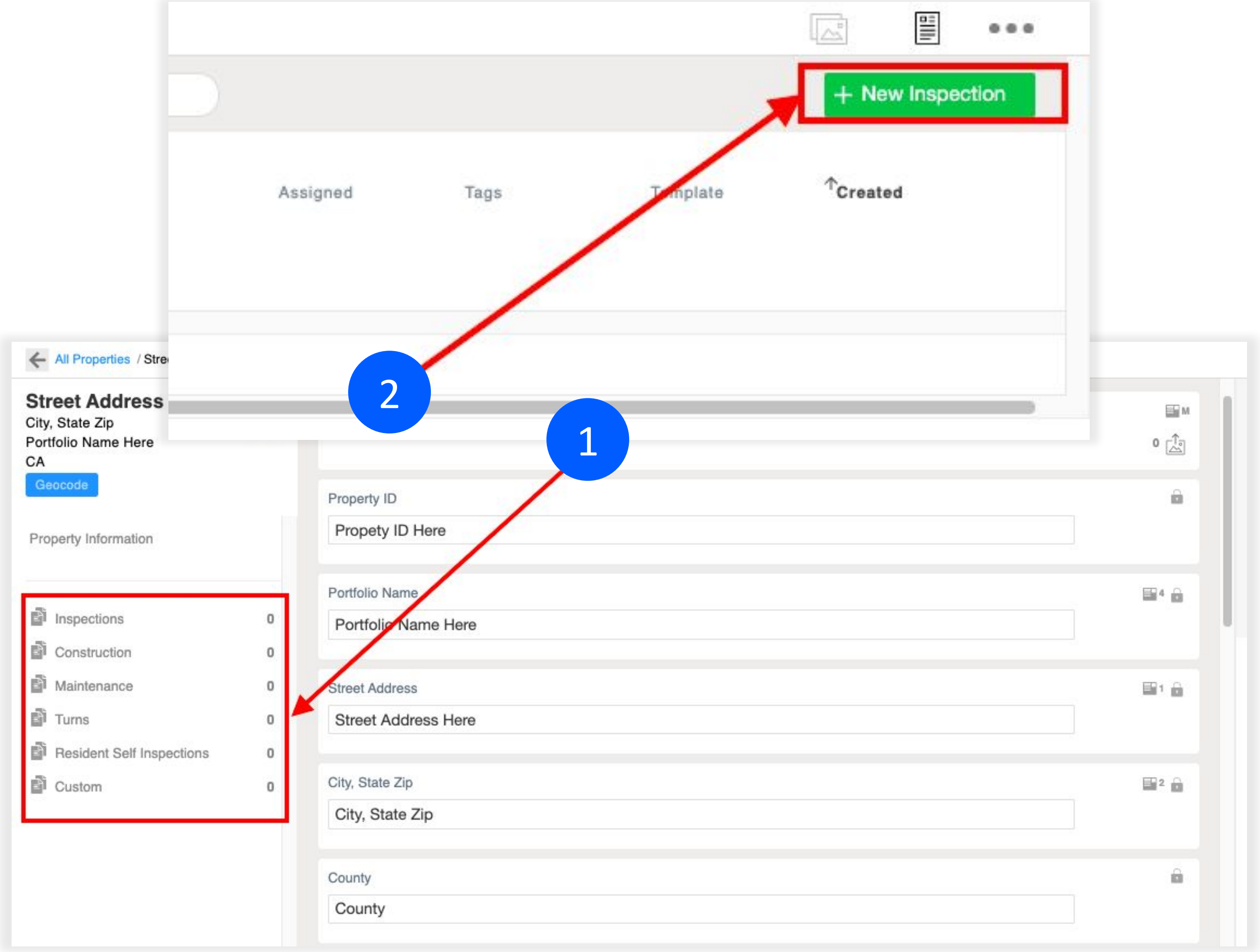


*Professional/Premium Feature Only.

Creating a Container and Attached Work

- On the left side, you can add new work that is attached to the container by clicking one of the types of work, like “Inspections” (1). Then, click the +New button on the right to select a template to create a new project attached to the container (2).

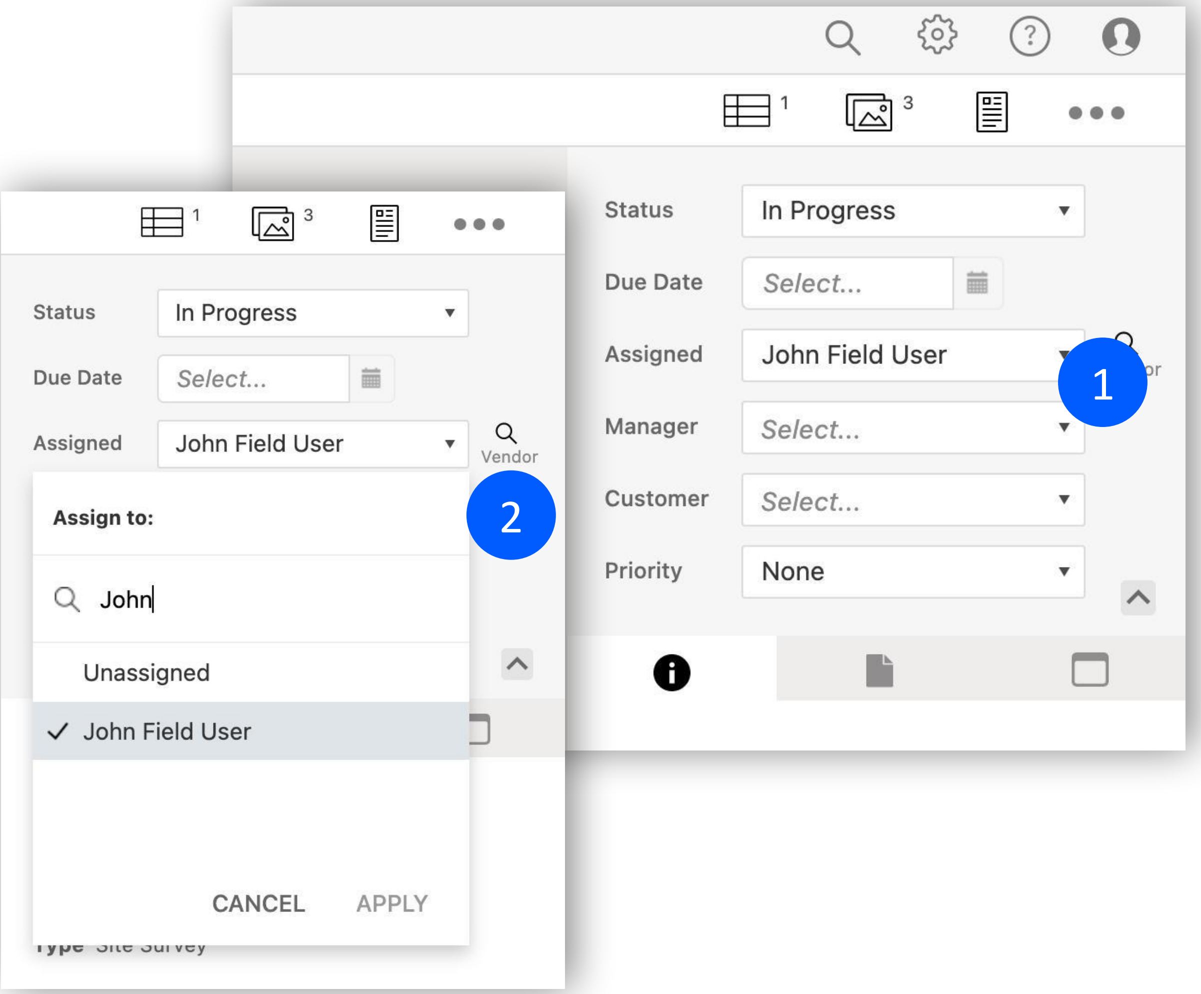
- The new project has been created and you can fill out the information, assign, add a due date, etc. Information in fields with matching field keys will copy down from the container to the new work order.



*Professional/Premium Feature Only.

Assigning Work

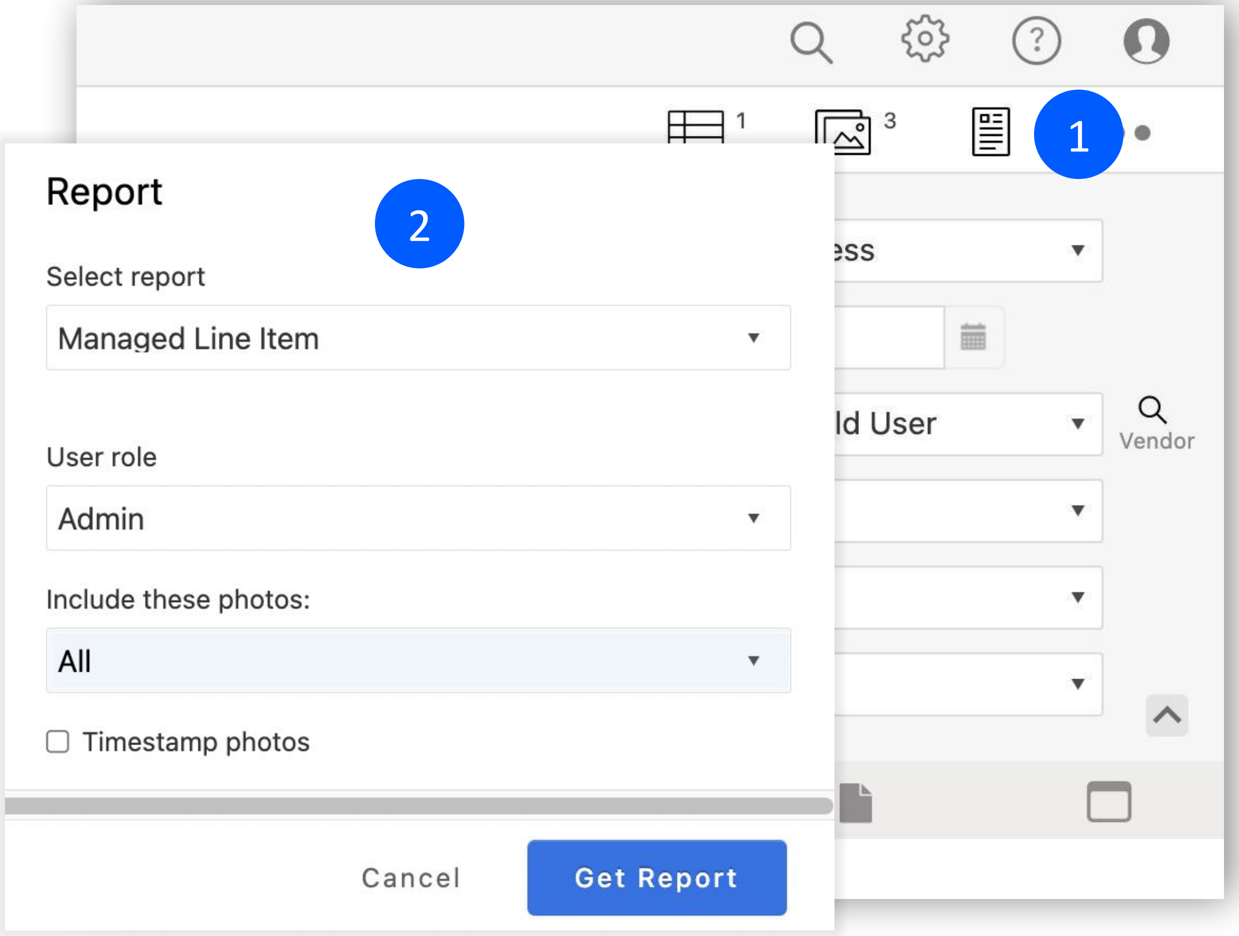
- To assign work, click into the project and locate the assignment dropdowns on the right (1).
- To assign a field user or vendor, click the Assigned dropdown, type the field user or vendor’s name, select them in the dropdown, and click apply (2).
- To set a manager or customer on a project, select their name from the Manager or Customer dropdown and click apply.



Generating a PDF Report

We have provided a few different kinds of PDF reports in your SiteCapture portal.

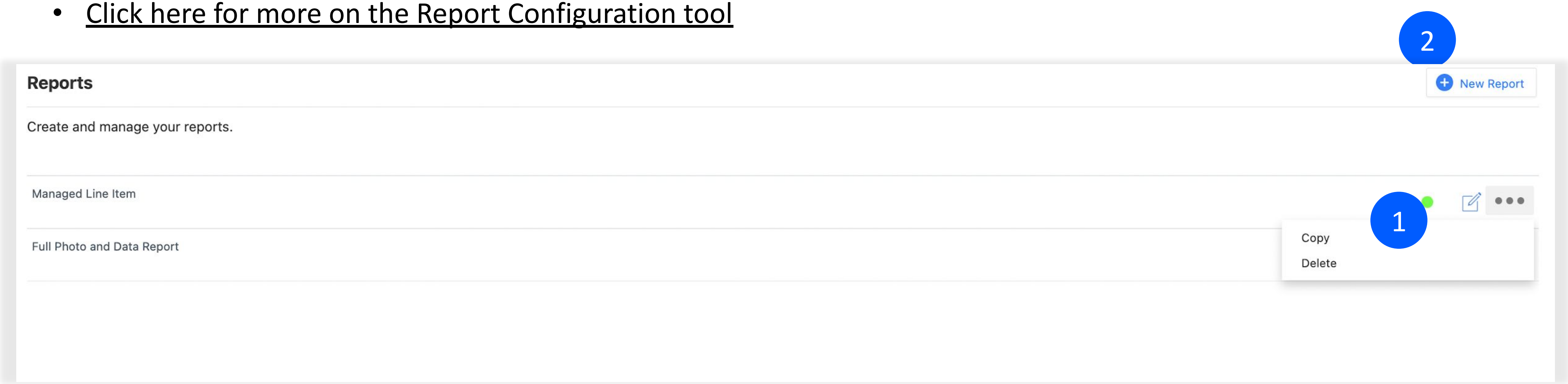
- To generate a report, click into any project and click the PDF report icon in the top right (1).
- Select the report you would like to generate from the dropdown (2).
- Select the User role. Admin will display all fields, Field User will display only fields that are not hidden from the field user, and Customer will display only fields that are not hidden from the field user.
- Select to include All photos, only flagged photos, or only unflagged photos. Check the box to include timestamp photos if needed. Click Get Report.



Report Configuration

The Report Configuration tool allows Portal Admins and Managers to configure PDF Reports.

- To get to the Report Configuration tool, click on the admin gear in the top right and select Reports.
- From here you can click the edit box to the right of any report to make changes or click the three dots to copy or delete a report (1).
- To create a new report, click the New Report button on the right (2).
- Click here for more on the Report Configuration tool



Additional Support

Visit our support site for additional support articles and videos:
https://sitecapture.zendesk.com

For technical support, email support@sitecapture.com