

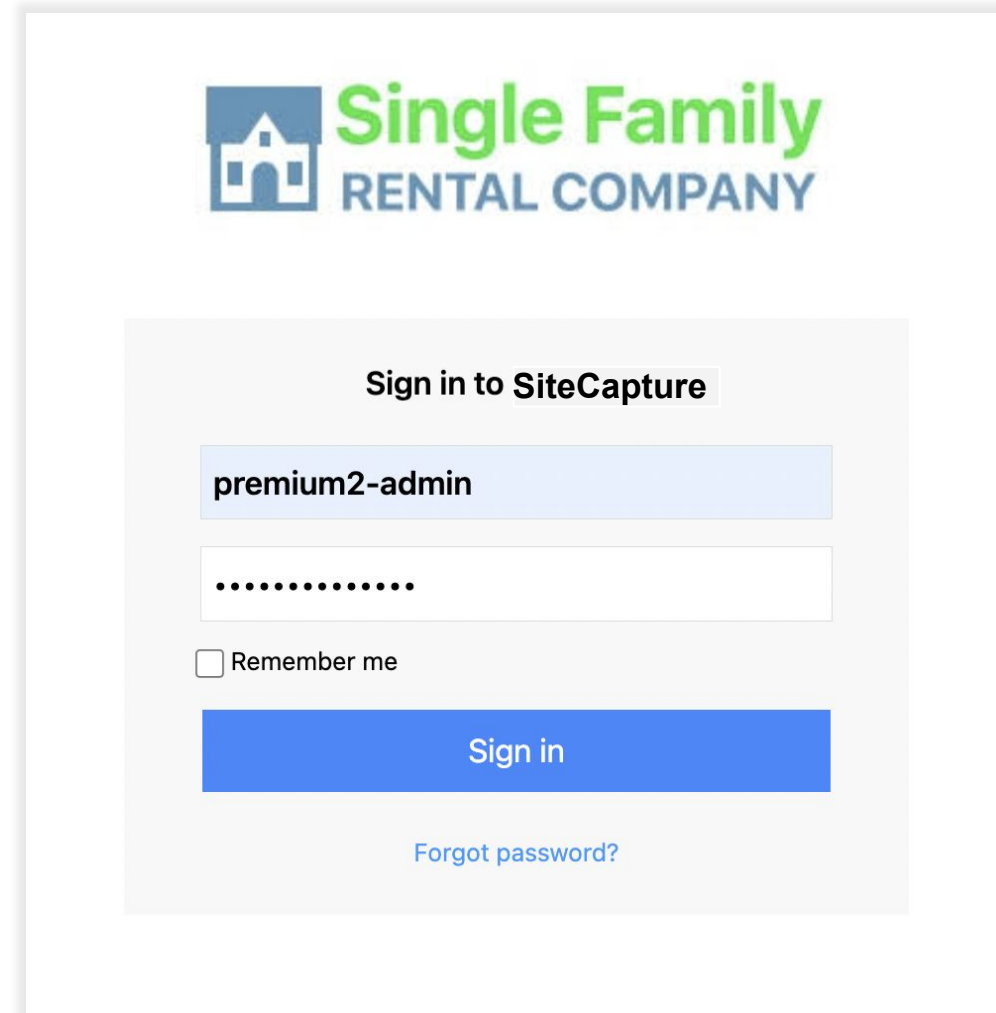
SITE[]CAPTURE

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.



Single Family
RENTAL COMPANY

Sign in to SiteCapture

premium2-admin

.....

Remember me

Sign in

[Forgot password?](#)

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.

Settings Save Changes

Mobile Projects

- Create new projects**
Allows Users and Field 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 the Completed or Cancelled projects 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. 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.

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).

Settings Save Changes

Mobile Photos

- Select from photo albums**
Allows users to select photos from camera roll and import them into SiteCapture.
- Require location data**
Requires users to enable location permissions to ensure all photos have GPS geo-tagging.

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

1:1

1

4:3

Compression photo quality
Higher numbers mean better quality but also larger file sizes.

Standard - 20

2

- Lowest - 0
- ✓ Standard - 20
- Medium - 50
- High - 80
- Higher - 90
- Highest - 100

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.

Settings

Notifications

SiteCapture can send an email notification when a project is created or assigned.

Send email notifications to:

Sender name:

Sender's reply-to 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.

Settings Save Changes

1 Send email on project creation

Text included in project creation email:

Write something...

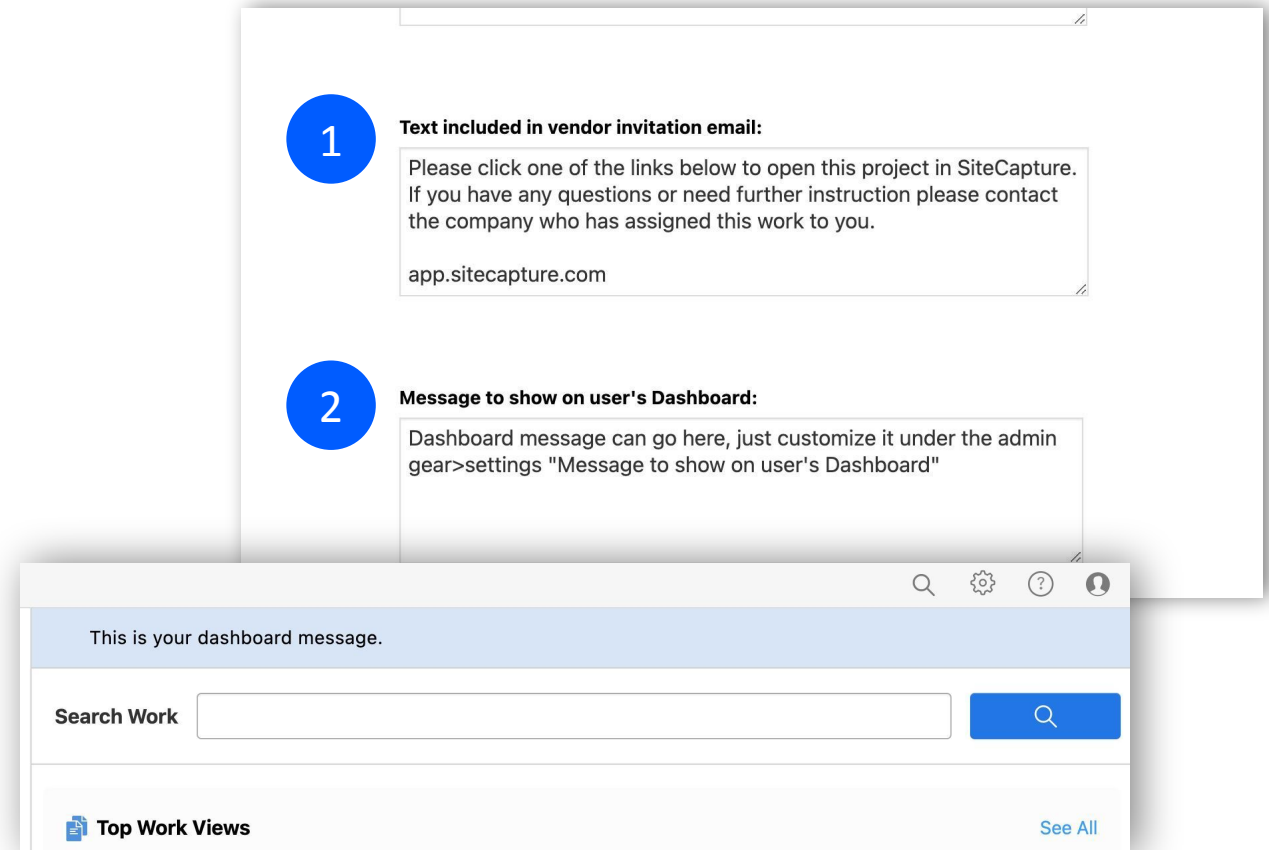
2 Send email on project assignment

Text included in project assignment email:

Please click one of the links below to open this project in SiteCapture.
If you have any questions or need further instruction please contact
the company who has assigned this work to you.

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.



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).

The screenshot displays the 'Settings' page for 'Work' in the SiteCapture application. The interface is divided into two main sections: 'Customizations' and 'Tags'.

Customizations:

- 1:** A red box highlights the 'Work' label in the top toolbar.
- 2:** A blue circle highlights the 'Display name for your type work:' field, which currently contains 'Work'.
- 3:** A blue circle highlights the 'Upload Image' button, which is used to add a company logo. The current logo for 'Single Family RENTAL COMPANY' is displayed above it.

Tags:

- 4:** A blue circle highlights the 'Add tag' button and the list of existing tags: 'Bad Marketing Photos', 'complete', and 'exception'. Each tag has a pencil icon for editing and a trash bin icon for deletion.

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).

The screenshot displays the SiteCapture admin interface. On the left, a navigation menu is visible with the following categories and items:

- Account**
 - Company Info
 - Settings
- Team** (highlighted with a blue circle containing the number 1)
 - Users** (highlighted with a blue bar)
 - Vendors
- Configuration**
 - Templates
 - Types
 - Services
 - Data Views
 - Reports
- Data & Integration**
 - Import
 - Integration Status
 - Activity Log

On the right side of the interface, the top navigation bar includes a search icon, a gear icon (highlighted with a blue circle containing the number 2), a help icon, and a user profile icon. Below the gear icon is a button labeled '+ Create New User'. At the bottom of the page, there is a table with the following headers: Phone Number, All Types, App Version, and Last Login. The table content is currently empty, showing '1 - 1 of 1' items.

Creating Users

- **Username 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.

Create New User

Username*	<input type="text" value="user@email.com"/>	Role	<input checked="" type="radio"/> Field User
Display Name	<input type="text" value="John Field User"/>		<input type="radio"/> Manager
Email Address*	<input type="text" value="user@email.com"/>		<input type="radio"/> User
Password*	<input type="password" value="...."/>		<input type="radio"/> Portal Admin
Confirm Password*	<input type="password" value="...."/>		
Job Title	<input type="text" value="Field Technician"/>		
Phone Number	<input type="text" value="555-555-5555"/>		
External Id	<input type="text" value="External Id"/>		

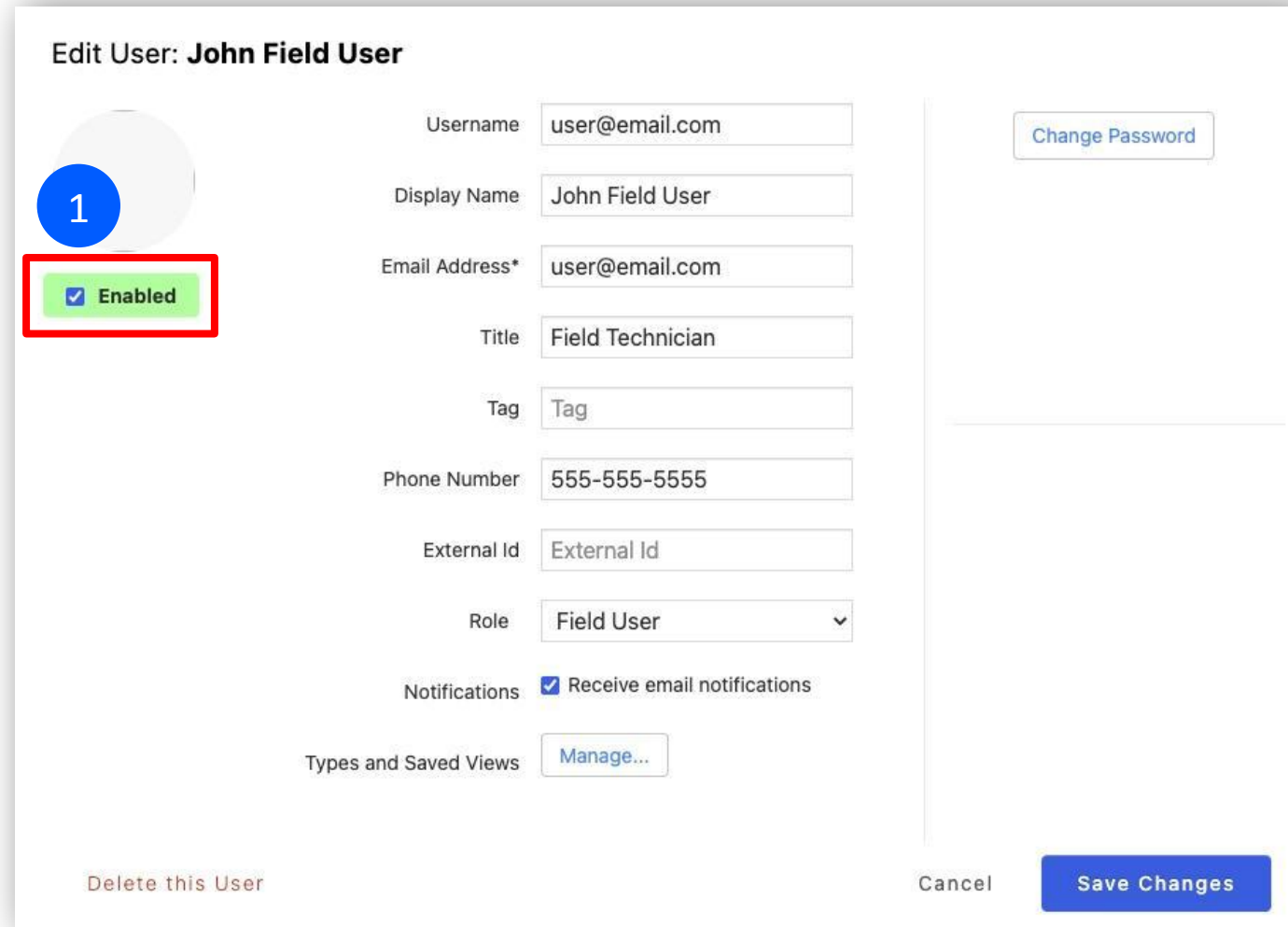
Email credentials to this user

Cancel

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.



Edit User: John Field User

1

Enabled

Username: user@email.com

Display Name: John Field User

Email Address*: user@email.com

Title: Field Technician

Tag: Tag

Phone Number: 555-555-5555

External Id: External Id

Role: Field User

Notifications: Receive email notifications

Types and Saved Views: [Manage...](#)

[Change Password](#)

[Delete this User](#) [Cancel](#) [Save Changes](#)

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).

Add New Vendor

FIRST, search for the vendor you want to add, that may already be in our list of vendors. **THEN** if you don't see the Company you're looking for, you may enter their information manually.

 1

Company	Contact	Email	
Test 123	TEST 123	test@email.com	2 <input type="button" value="Add"/>

[I don't see the vendor I'm looking for, so I need to add a new one.](#)

Close

*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.

Connect to Test 123

Send invitation to connect on SiteCapture.
Once they accept, you may assign them work.

Email invitation to:

Cancel

*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 New Vendor

FIRST, search for the vendor you want to add, that may already be in our list of vendors. THEN if you don't see the Company you're looking for, you may enter their information manually.

Add New Vendor

Company

Company name **required**

Address

City

State

Zip

Primary contact

Contact name **required**

Contact e-mail **required**

Contact phone

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.

Connect to Contractor Testing Co

Send invitation to connect on SiteCapture.

Once they accept, you may assign them work.

Vendor username:

Email invitation to:

Copy views from vendor with vendor key of:

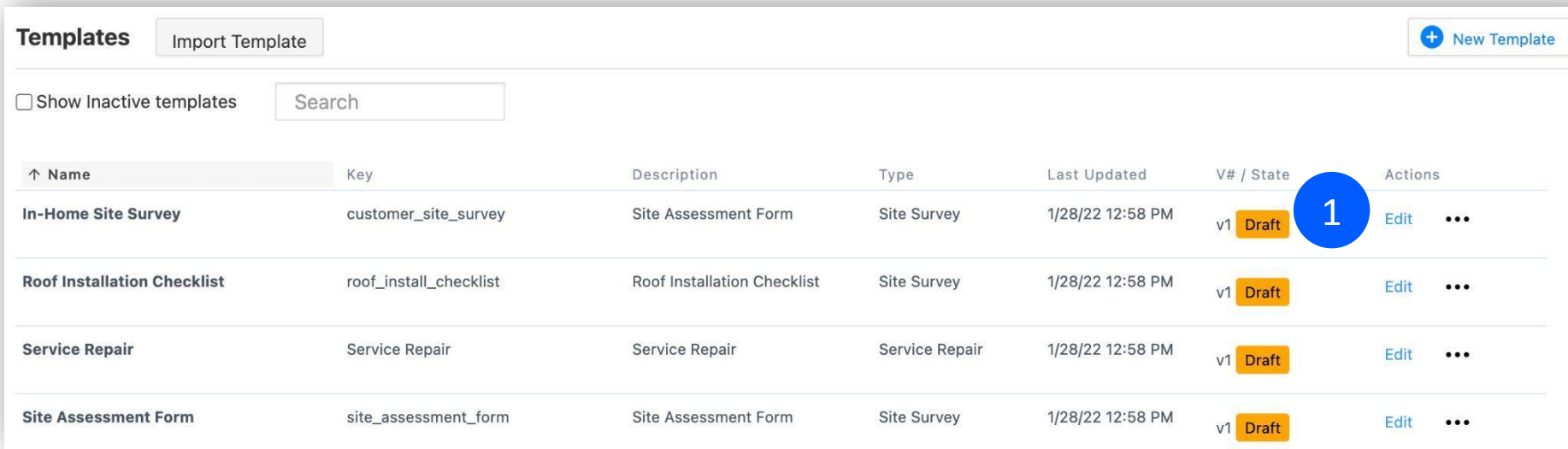
Cancel

Send

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.

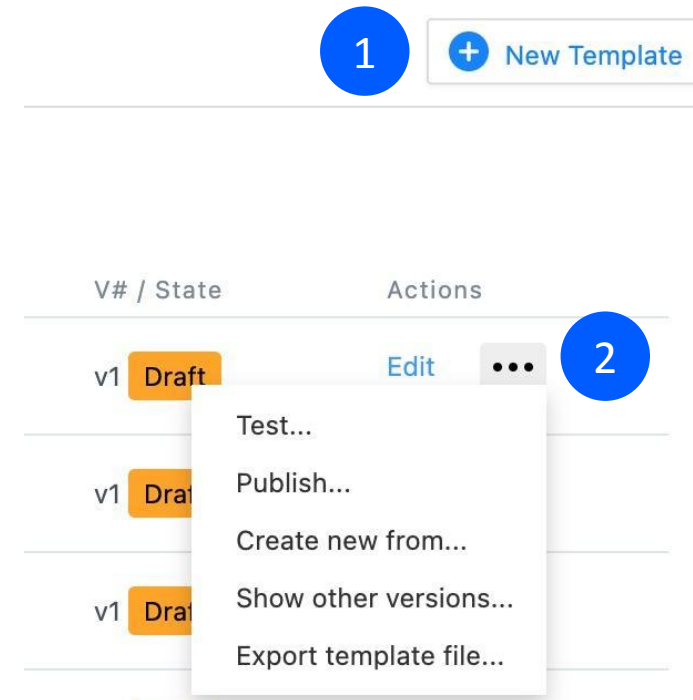


The screenshot displays the 'Templates' management page. At the top, there is a header with the title 'Templates', an 'Import Template' button, and a '+ New Template' button. Below the header, there is a search bar and a checkbox for 'Show Inactive templates'. The main content is a table with the following columns: Name, Key, Description, Type, Last Updated, V# / State, and Actions. The table lists four templates: 'In-Home Site Survey', 'Roof Installation Checklist', 'Service Repair', and 'Site Assessment Form'. Each template row has an 'Edit' button and a three-dot menu icon. A blue circle with the number '1' is overlaid on the 'Edit' button for the 'In-Home Site Survey' template.

↑ Name	Key	Description	Type	Last Updated	V# / State	Actions
In-Home Site Survey	customer_site_survey	Site Assessment Form	Site Survey	1/28/22 12:58 PM	v1 Draft	Edit ...
Roof Installation Checklist	roof_install_checklist	Roof Installation Checklist	Site Survey	1/28/22 12:58 PM	v1 Draft	Edit ...
Service Repair	Service Repair	Service Repair	Service Repair	1/28/22 12:58 PM	v1 Draft	Edit ...
Site Assessment Form	site_assessment_form	Site Assessment Form	Site Survey	1/28/22 12:58 PM	v1 Draft	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!



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](#)

The screenshot displays the 'Basic photo inspection - soft scope - v3' template in a 'Draft' state. The interface is divided into several sections:

- FORM SECTIONS:** A list of sections including Property Information, Exterior, Interior, Mechanical, and Other. A blue circle '1' highlights a plus sign (+) at the top of this list, indicating where to click to add a new section.
- Section Management:** Each section in the list has a right-side menu with three dots. A blue circle '2' highlights the 'Delete section' option in the menu for the 'Exterior' section.
- Edit Template:** A modal window is open, showing the 'Edit Template' settings. A blue circle '4' highlights the 'Edit' icon (pencil) next to the template name 'Basic photo inspection - soft scope', which is used to access these settings.
- Section Settings:** A blue circle '3' highlights the 'Edit' icon (pencil) next to the 'Property Information' section in the list, which opens a settings panel for that specific section.

The 'Edit Template' modal includes fields for Name, Type, Report, Manage Status Options, Default Icon, Report Logo, Display Lines, and Media Field. The 'Manage Status Options' table is as follows:

Manage Status Options			
New	/ NEW		
In Progress	/ In Progress		
Complete	/ COMPLETE		

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](#)

The screenshot displays a list of template fields in the SiteCapture application. Each field row includes a description, a field type, and a set of icons for actions like favorite, lock, add photo, comment, view, edit, and delete. A context menu is open over the 'Estimated year roof was installed?' field, showing options: Insert, New field..., Copy of this field, Copy of different field..., and Delete. A blue circle with the number '1' highlights the 'Delete' option. Another context menu is visible over the 'Exterior photos' field, showing the same options.

Is the roof in good condition? Photos and comments if no. <i>roof</i>	Boolean	★ 🔒 📷 💬 🖼️ 🧑 📱 📄
Estimated year roof was installed? <i>roofyear</i>	Integer	★ 🔒 📷 💬 🖼️ 🧑 📱 📄
Note and photograph any issues (fencing, structure, coverings) <i>additional_notescments_exterior</i>	Long Text	★ 🔒 📷 💬 🖼️ 🧑 📱 📄
Exterior photos (take enough for a good representation of exterior) <i>exterior_photos</i>	Image	★ 🔒 📷 💬 🖼️ 🧑 📱 📄
Detail scope for any exterior repairs or upgrades <i>scope exterior</i>	Long Text	★ 🔒 📷 💬 🖼️ 🧑 📱 📄
Estimated cost of exterior work <i>estexterior</i>	Dollar Amount	★ 🔒 📷 💬 🖼️ 🧑 📱 📄

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

updated Report: Full Photo and Data Report

Open All Sections Close All Sections

Section: Property Information
property_information

Property Photo property_photomain	Image
Property ID property_id	Text Field
Street Address address	Text Field
City, State Zip address_line2	Text Field
County county	Text Field

Possible Data Loss Some features might be lost if you save this workbook in the com...

	A	B	C	D	E	F	G
1	Property ID	Street Address	City, State Zip	County			
2	property_id	address	address_line2	county			
3	12345	541 Apple Street	Oakland, CA	94501			
4	67890	671 Apple Street	Oakland, CA	94501			
5							

*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.

Import Property

Step 1: Start an import. Select a template and an import file.

With the help of a spreadsheet and a template, you can batch create items in SiteCapture. Place a template's fieldkeys in the top of each column and each row of data will create a new item. Please read our Help Center article on [Importing Projects](#).

Select template

Remove invalid characters from data **1**

File Test.csv

Choose a CSV file from your computer... **2**

Upload and Validate your Import File

*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.

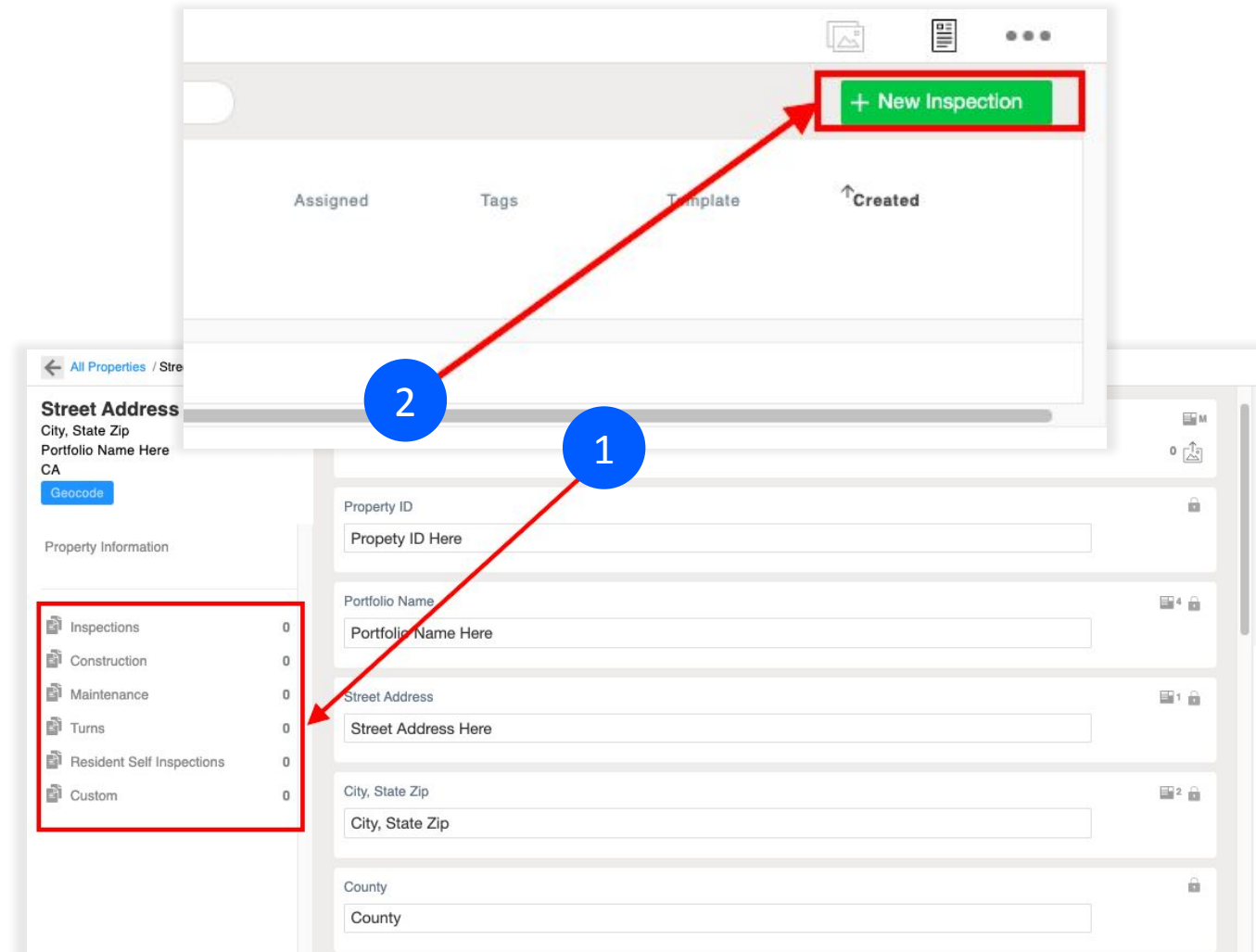
The screenshot displays the 'Properties' management interface. At the top right, a green '+ Property' button is highlighted with a red box and a blue circle containing the number '1'. Below this, the 'Property Information' section is visible, with a blue circle containing the number '2' over the 'Geocode' button. The main form area is outlined in red and contains the following fields:

- Property Photo
- Property ID
- Property ID Here
- Portfolio Name
- Portfolio Name Here
- Street Address
- Street Address Here
- City, State Zip
- City, State Zip
- County
- County

On the left side of the form, there is a sidebar with 'Property Information' and a list of categories with counts: Inspections (0), Construction (0), Maintenance (0), Turns (0), Resident Self Inspections (0), and Custom (0).

Creating a Container and Attached Work

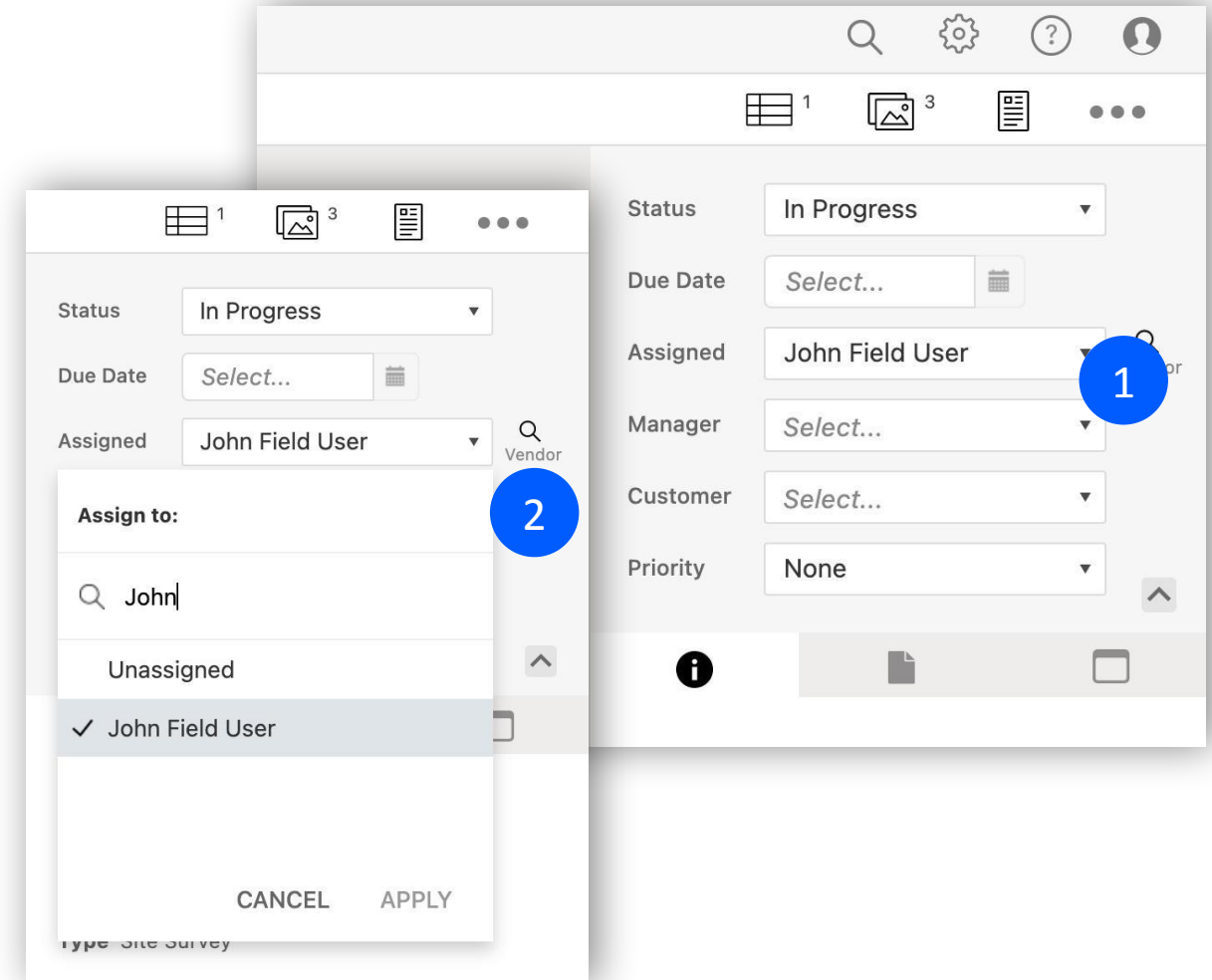
- On the left side, you can add new work that is attached to the container by clicking one of the types of work, like “Inspections” (1). Then, click the +New button on the right to select a template to create a new project attached to the container (2).
- The new project has been created and you can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

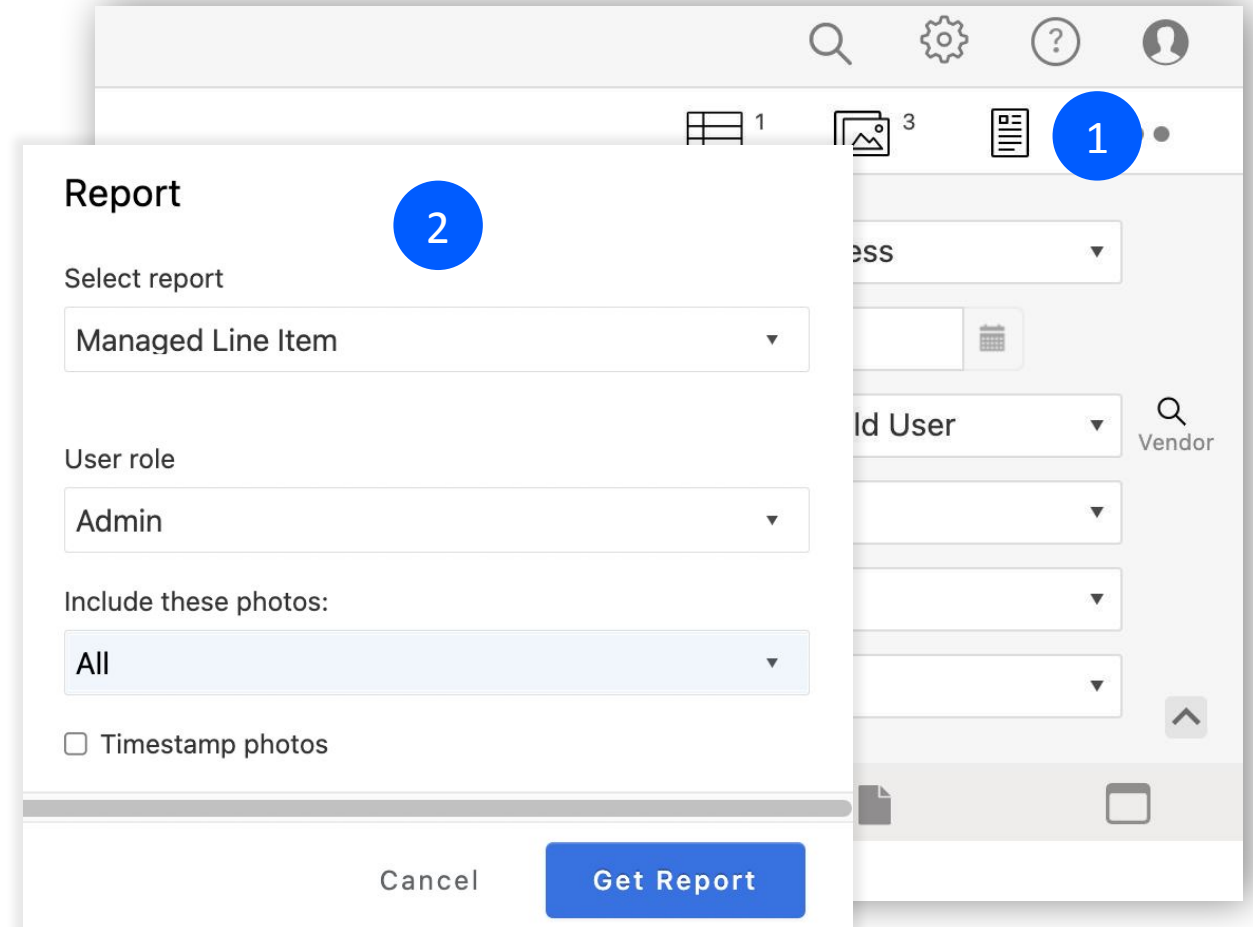
- To assign work, click into the project and locate the assignment dropdowns on the right (1).
- To assign a field user or vendor, click the Assigned dropdown, type the field user or vendor's name, select them in the dropdown, and click apply (2).
- To set a manager or customer on a project, select their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

The screenshot displays the 'Reports' section of the application. At the top right, there is a '+ New Report' button, highlighted with a blue circle containing the number '2'. Below this, the text 'Create and manage your reports.' is shown. A table with the following content is visible:

Managed Line Item
Full Photo and Data Report

To the right of the 'Full Photo and Data Report' row, there is an edit icon and a three-dot menu icon. A context menu is open over the three-dot icon, containing 'Copy' and 'Delete' options. This menu is highlighted with a blue circle containing the number '1'.

Additional Support

Visit our support site for additional support articles and videos:

<https://sitecapture.zendesk.com>

For technical support, email support@sitecapture.com