

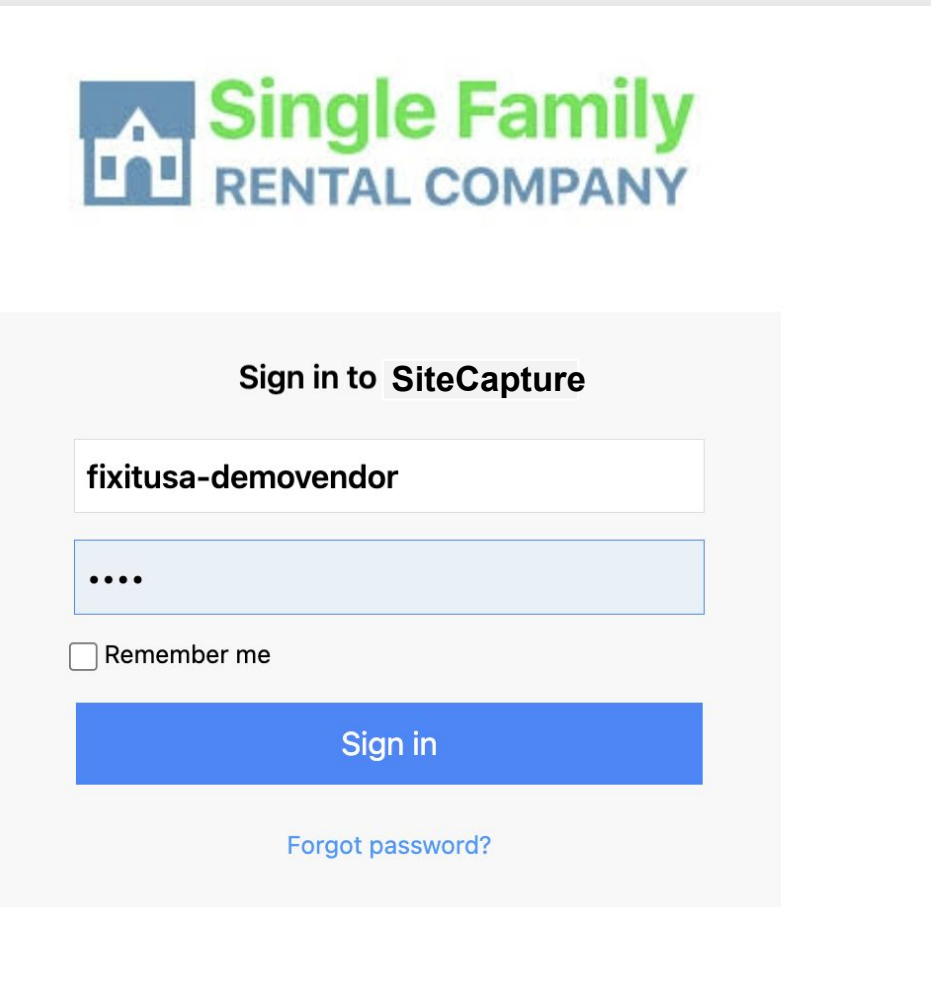
SITE[oi]CAPTURE

**Web App Training
for Vendor Company Admins**

Logging In

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

- 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 reach out to the company that has assigned work to you in FotoNotes.



Single Family
RENTAL COMPANY

Sign in to SiteCapture

fixitusa-demovendor

....

Remember me

Sign in

[Forgot password?](#)

Dashboard, Searches and Views

The first page you see in the web app will be the dashboard.

- Click on the Saved View (1) that has been created for you or click the link in the top toolbar (2).

Sites 2

SITE[O]CAPTURE

SiteCapture Demo
409 Piedmont Ave
Oakland CA 94614

Primary Contact: SiteCapture Admin
admin@email.com
646-277-9090

You're signed in as: Demo Administrator
scmktg-admin · Portal Admin

Usage

Users	7
Templates	19

Search Work

Top Site Views 1

- All Sites ★ 6
- Atlanta Market Properties
- Southeast Region Properties
- All Sites In Construction

Top Work Views 1

- All ★
- All Inspections
- All Estimates
- All Construction
- All Work Orders

Recent Activity

Searches and Views

After clicking on the Saved View or Work link, you will see a list of work assigned to you and Saved Views on the left.

- Saved Views are groups of work created in a search using unique criteria (1).
- To add a view to **Favorites**, click the star icon next to the view name (2).
- Click New Search on the right to create a new view (3).

The screenshot displays the 'Work' section of the SITE[O]CAPTURE interface. The left sidebar shows a 'VIEWS' list with 'All Estimates' highlighted. The main area shows a table of work items under the 'All Estimates' view. Annotations 1, 2, and 3 highlight the 'VIEWS' list, the star icon, and the 'New Search...' button respectively.

Assigned	Title & Description	Status	Updated	Priority	Due	Assigned	Tags	Template	Created
<input type="checkbox"/>	ESTIMATE Renovation Initial Bid/Estimate	New 37 days		None				SFR Initial Bid/Estimate v3 Estimates	12/14/22 3:20 PM
<input type="checkbox"/>	REPAIR Mr. Homeowner 1234 W Main Street Somewhere, Iowa 99999 Central - Iowa	New 58 days		None				Solar Service Repair w/ Estimating v7	11/23/22 12:26 PM

Searches and Views

On the next screen, select the criteria for your search.

For example, you can select all work with a status of In Progress by selecting "In Progress" in the Status dropdown and clicking search (1).

You may also want to select specific types of work, due dates or work created during a specific timeframe.

Search Filters for Work Orders

Types: Select

Template: All

Due Date: None

Contains text:

Match text exactly

Advanced search options

Priority: All

Tag: All

Created: None

Current Status Date: None

Status: In Progress (1)

Assigned: Check All, Uncheck All

Archives: Search...

Closed

Complete

Declined

In Progress

Manager: Manager Review

Customer: New

[Clear all filters](#) Cancel Search

Searches and Views

After clicking Search, a list of work meeting that criteria will appear.

- Save the search as a saved view by clicking the three dots at the top and selecting [Save as new view...](#) (1)
- Give your Saved View a name (2).
- The new Saved View will appear in the list on the left (3).

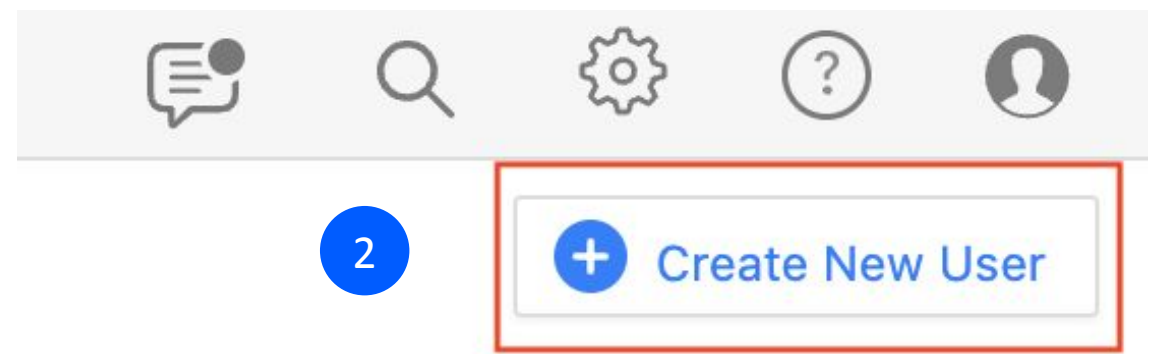
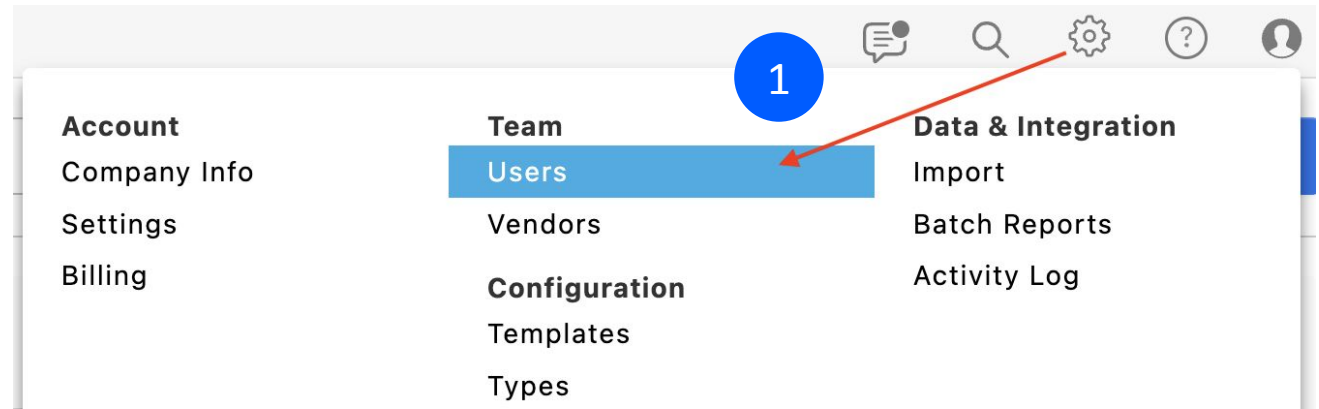
The screenshot shows the 'Work' tab in the SiteCapture application. On the left, a sidebar lists various views under 'FAVORITES' and 'VIEWS'. The 'All Work Orders' view is highlighted with a blue circle labeled '3'. In the main content area, the 'All Work Orders' view is selected, and a three-dot menu is open, showing options like 'Data View...', 'Save changes to this view...', 'Save as new view...' (highlighted with a blue circle labeled '1'), and 'Export results...'. A 'Save View' dialog box is open in the foreground, with the 'Name' field containing 'All Work Orders' (highlighted with a blue circle labeled '2') and the 'Who can see this view' dropdown set to 'All Users - EVERYONE'. The dialog has 'Cancel' and 'Save' buttons.

Creating a Field User

The company assigning work to you in SiteCapture will provide you with **Vendor Basic Admin** credentials. When you log in, you will have access to all work assigned to you by that company.

As a Vendor Basic Admin, you can set up additional field users to sub-assign work.

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



Creating a Field User

- The user role will be Field User.
- **Username within SiteCapture must be unique.** We recommend using the user's email address. Enter a unique password. (The user can change it later with the forgot password link) (1).
- Enter the user's email and any other information you have (like job title, phone number) and **Click Create** (2).

You can now manage this user from the list on the User page.

Create New User

1 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"/> User
Email Address*	<input type="text" value="user@email.com"/>	2	
Password*	<input type="password" value="...."/>		
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

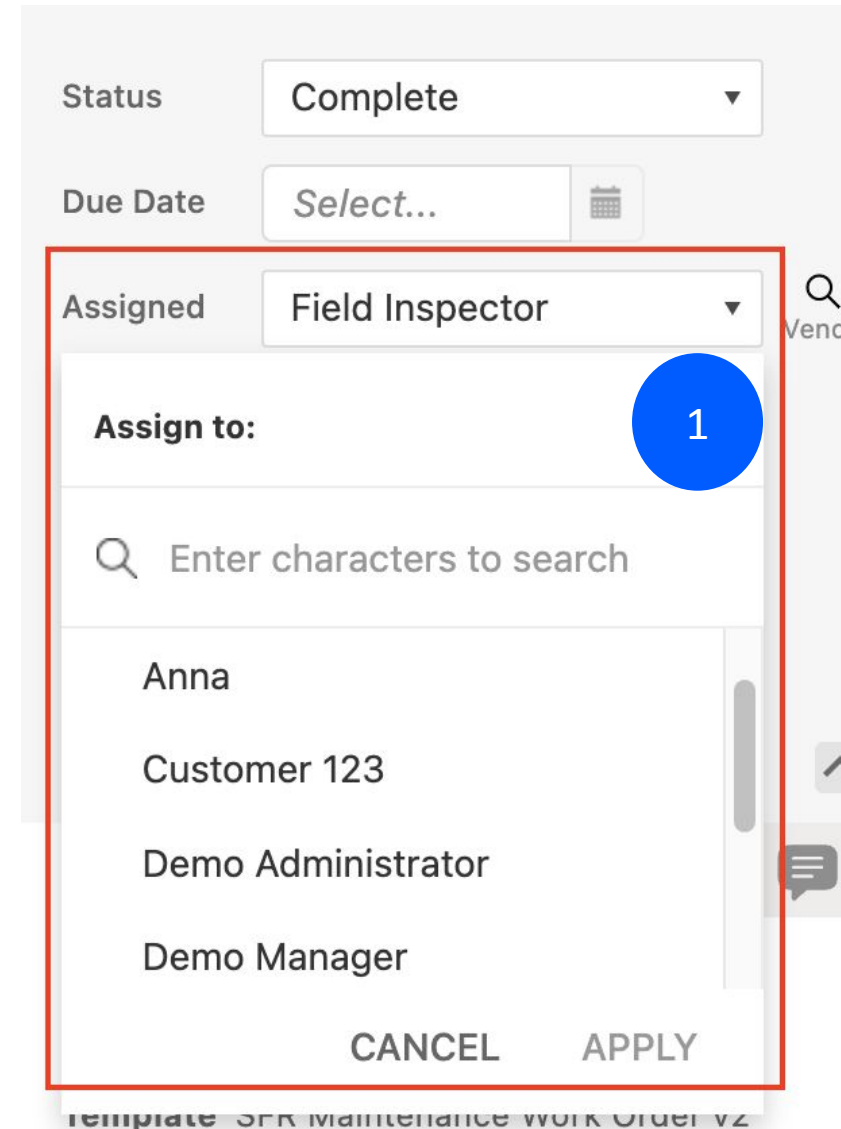
Sub-Assigning Work to a Field User

To sub-assign work with a user, go to a project you would like to assign.

- In the Assigned dropdown, select the user you want to assign the work to and click Apply (1).

When a user you have created and sub-assigned work to signs in, ***they will only see work that has been assigned to them.***

NOTE: You can assign work to a single user, but work can be shared with as many users as needed.



Status Complete

Due Date Select...

Assigned Field Inspector

Assign to: 1

Enter characters to search

Anna

Customer 123

Demo Administrator

Demo Manager

CANCEL APPLY

template SFR Maintenance work Order v2

Sharing Work

Share work with additional users, so more than one user can work on the project.

- Click the (•••) menu and select **Share**. A modal will open showing a list of users sharing this project.
- Click the **Add person** dropdown to select a user.
- Click the **Permission level** dropdown to select a permission. Choose:
 - Read Only** if you only want them to have access to see and review the work.
 - Edit** to give them access to answer questions, edit data or add photos.
- Check **Notify via Email** to send an email that they have been granted access.
- Click **Add** to share access with the user.

Share

The screenshot shows a 'Share' modal with the following elements:

- Add person**: A dropdown menu with 'Customer 123' selected.
- Permission level**: A dropdown menu with 'Read only' selected (indicated by a checkmark).
- Notify via email**: A checkbox that is checked.
- Add**: A blue button to confirm sharing.
- Shared with**: A section below the main form, currently empty.

Additional Support

Visit our support site for additional support articles and videos:

<https://sitecapture.zendesk.com>

For technical support, email support@sitecapture.com