



## **Portal Administrator Guide**

Username:		
Password:		

Record your login credentials for future reference

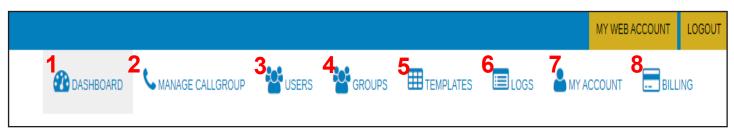
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## **Web Portal Navigation**

Log into the Web Portal at user.zapopen.com with your email address and password.



## **Navigation Bar**

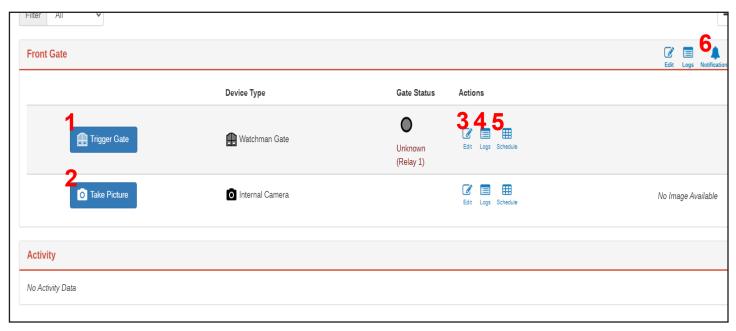
The navigation bar displays on every screen in the portal. The options on the navigation bar are defined below:

- 1. The **Dashboard** icon returns you to the Dashboard. The Dashboard is the first page you see when you enter the portal
- 2. The **Manage Callgroups** icon lets you view and import callgroups.
- 3. The **Users** icon allows you to edit their information and permissions and to add and delete users as needed.
- 4. The **Groups** icon opens your groups. CellGate has created groups to meet most common needs. From this screen you can create additional groups, change group schedules and permissions, and update members in the group.
- 5. The **Templates** icon lets you create Schedule Templates and User Group Restriction Templates. You can use templates to create and save schedules that you often use. You can also use templates to create schedules for unusual times, when you need to ignore any programmed schedule.
- 6. The **Logs** icon shows the recent activity on each of your gates. You can export this information to manage it in Excel.
- 7. The **My Account** icon allows you to edit your account information, including your account contact information. You can add and remove contacts, and update address and timezone information.
- 8. The **Billing** icon allows you to view your billing information, including your billing contact. You can see the amount billed to you each pay period and view recent invoices.

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## **Dashboard**

The Dashboard is the first screen you see when you log into the Web Portal at user.zapopen.com with your email address and password.



## **Dashboard Options**

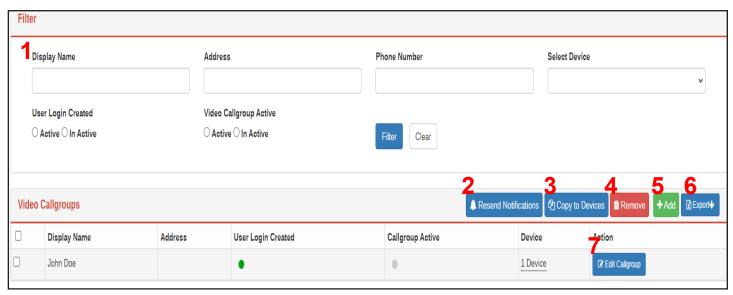
Refer to the numbers for information about what each option on the Dashboard allows you to do.

- 1. Click Trigger Gate to trigger this gate.
- 2. Click Take Picture to take a photo from the gate's camera.
- 3. Click to edit the name of this gate.
- 4. Click to view recent logs from the device.
- 5. Click schedule to set a schedule for this gate.
- 6. Click the Notifications to set up text and email notifications.

## **Callgroups**

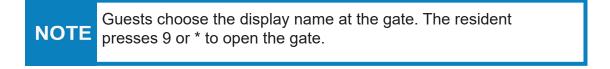
## **Manage Callgroup**

With Manage Callgroups, you can filter your callgroups and update your callgroup information.



- 1. Use the Filter section to filter the way the information about your callgroups displays. If you choose to filter by Display Name, you can enter the display name of the callgroup you're looking for, then click Filter. This callgroup displays. You can also filter according to Address, Phone Number, or Device. You can choose to see whether the user has already created a login (Login Active) and whether the callgroup is active (View CallGroup Active). Remember, click Filter when you've entered your specifications!
- 2. Click Resend Notifications to resend an invitation for someone to set up their callgroup.
- 3. Click Copy to Devices to copy the callgroup to your device.
- 4. Click Remove to remove the callgroup.
- Click + Add to add a callgroup.
- 6. Click 
  □ Export 

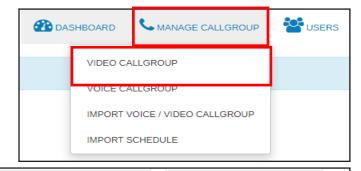
  to export your callgroup to a spreadsheet.



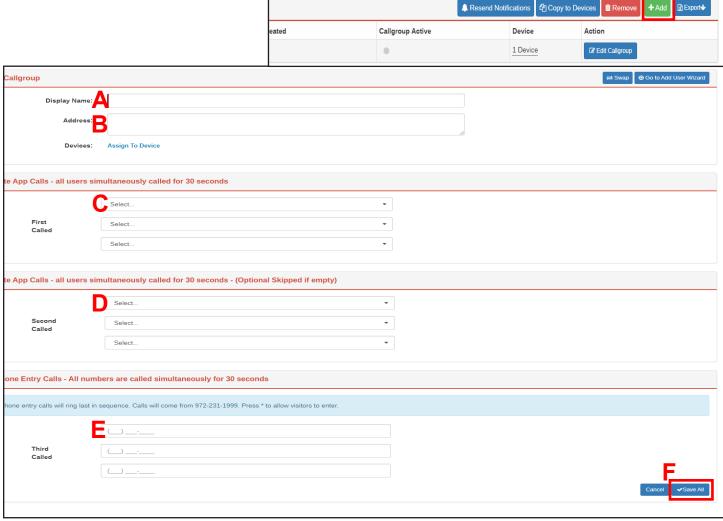
## Add a Video Callgroup

To add a Video Callgroup,

1. Click Manage Callgroup, click Video Callgroup.



2. Click + Add



Clear

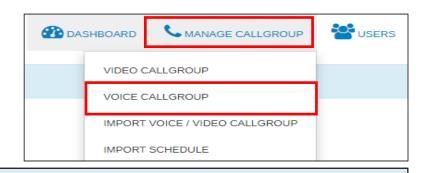
- 3. Enter the following:
  - A. The Display Name is the name that displays for the callgroup.
  - B. The Address is optional.
  - C. Enter the First Called users. These are the first app users who are called.
  - D. Enter the Second Called users. This is the second set of app users called.
  - E. Enter the *Third Called* phone numbers. This tier is voice only.
  - F. Click Save All to save the callgroup information.

## Add a Voice Callgroup

To add a Voice Callgroup,

1. Click Manage Callgroup, click Voice Callgroup.





V Filter...

Group

Account Admin

Video Callgroup Manager with Remote Access

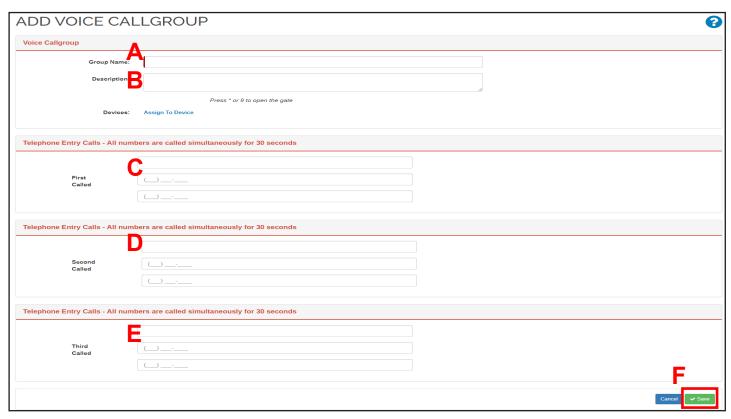
Select...

Restrictions

Winter Access

Callgroups

John Doe



- 3. Enter the following
  - A. Group Name which is the voice callgroup name.
  - B. The Description is optional.
  - C. Enter the First Called phone numbers. These are the first phone numbers called.
  - D. Enter the Second Called phone numbers. These are the second set of numbers called.
  - E. Enter the *Third Called*, which is the final group.
  - F. Click Save to save the callgroup information.

## **User Invite**

#### **Create Password**

The user receives an invite to the portal via email. Callgroup Users and Callgroup Managers set up their password and add the Cellgate app. Callgroup Users *cannot* reset their password.

After creating login information, callgroup managers set up their callgroups.

1. Click the link in the email.



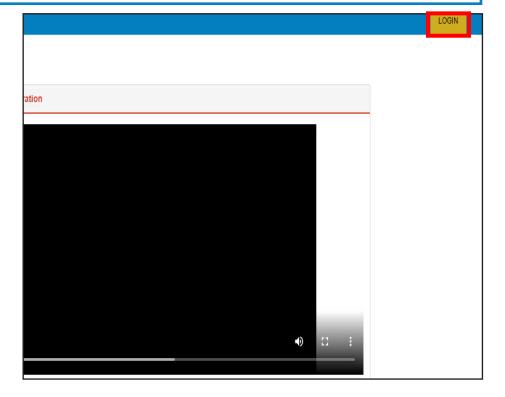
2. Create a login password. You'll use this password to login to the portal.



**NOTE** 

Passwords must contain 8-15 characters, with at least 1 number and 1 lowercase letter.

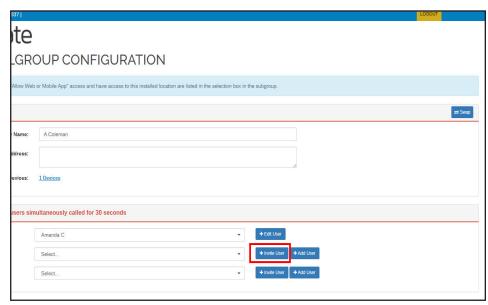
 Watch the video on the landing page. Once you've watched the video, click Login, and reenter your username and password.



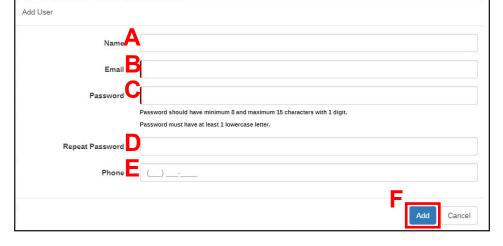
## **Set up Callgroup**

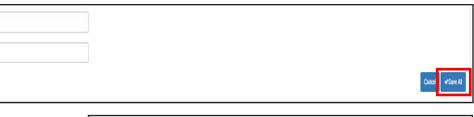
If you are a CallGroup Manager, you can then set up your callgroup. Callgroup Users cannot set up a callgroup. After creating a password and logging in, the Callgroup Manager see the page to invite users to the callgroup.

1. Click Invite User next to the user at the tier level you want to invite.



- 2. Enter the following:
  - A. User's Name
  - B. Email
  - C. Password for the user.
  - D. Confirm the password.
  - E. Add the user's Phone Number.
  - F. Click Add
- 3. Click ✓Save All
- 4. You'll receive a warning that changes require 30 minutes to take effect. Click ok.





user.zapopen.com says

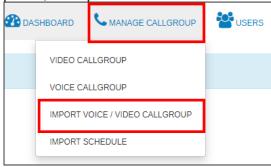
Your Changes may take up to 30 Minutes to take effect. Please download the watchman app, and login using your email & password.

## **Import**

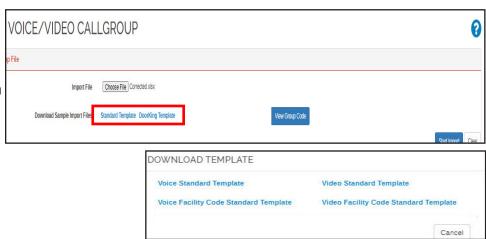
## **Import Users to a Callgroup**

You must use the CellGate Excel spreadsheet, available on the portal, to import new information.

 Click Manage Callgroup. Click Import Voice/Video Callgroup.



2. Download the appropriate template. Select Standard Template or DoorKing Template. With Standard Template, a popup opens with more specific options. Select the template that meets your needs; the template opens in Excel



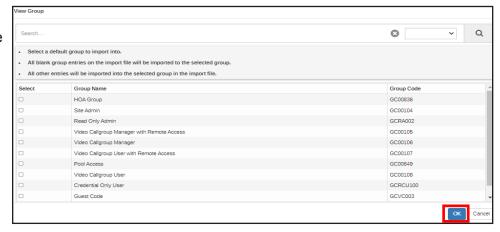
3. While filling out the Excel spreadsheet, click

View Group Code in the portal.

Group codes are used to identify specific groups. The code identifies users in this group and assigns permissions accordingly. Use these codes to fill out the spreadsheet. Click ok to close the popup.

For more information about groups, see the Groups section.

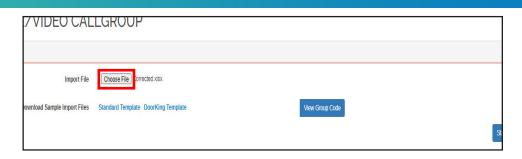




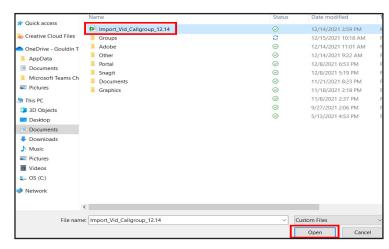
**NOTE** 

Only groups that have already been set up display.

4. To import your file, click Choose File |.



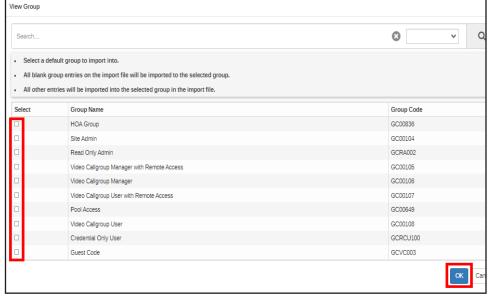
5. Select your updated file with your current information.



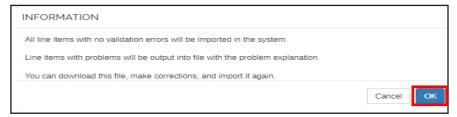
6. Click Start Import



7. Select a Group Code. Any user without a group code will be imported to the group selected on the screen. Click



8. A popup informs you that all error free data will be imported. Click ox.



## **CellGate Portal**

9. Enter your Property
Manager's information; the
Property Manager is notified
by email and text that you've
uploaded the file. Click
Import Now
.

You can view the upload progress in the progress bar under *Import Status*. All entries with errors are separated.

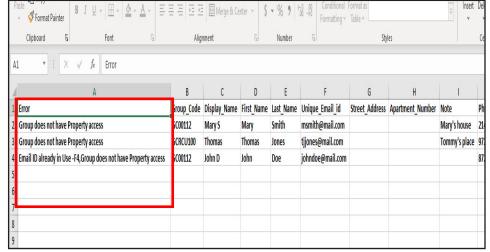


 Click Downloaderror.log to view the information you need to correct in Excel.



Errors are identified in the left column.

11. Correct the error or errors



NOTE

The cell that contains the error is identified, along with the error, in the left column.

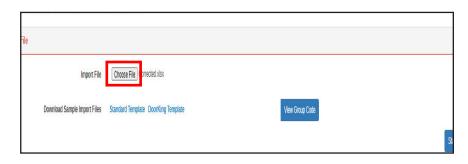
- in each row. Save your spreadsheet.
- 12. Return to the portal and click Choose File |.

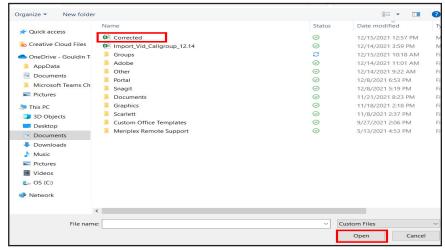
13. Select the file that includes your corrections.

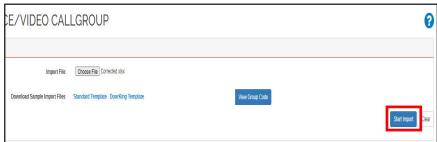
14. Click Start Import

Uses the corrected file to resolve problems and automatically merges the data.

You can now view the imported users.







## **Users**

## **Create Users**

- Click the User tab, and click Manage Users.
- 2. Click + Add User



Callgroups

MANAGE CALLGROUP

**USERS** 

Groun

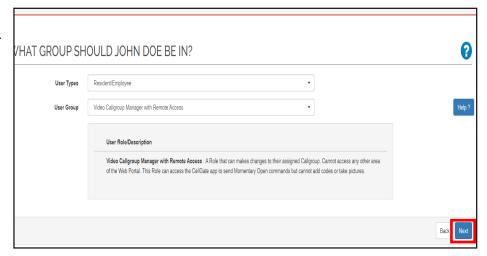
Restrictions

GROUPS

- 3. Enter the following:
  - A. User Name
  - B. Email
  - C. Phone Number
  - D. Timezone.
  - E. Click Next .



4. From the dropdowns, select the User Type and User Group. If you are creating a Callgroup Manager, specify the *Voice or Video Call Group* as determined by your account tier. Click Next.



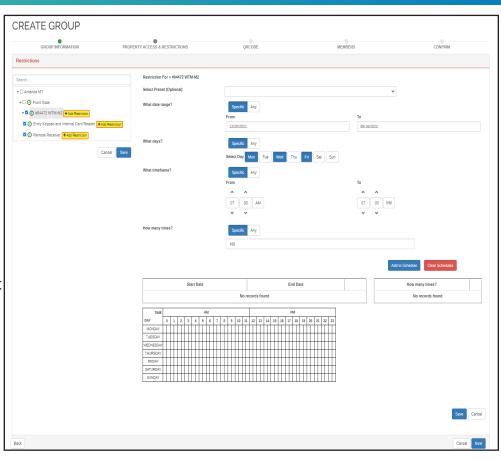
## **CellGate Portal**

5. Create restrictions as needed, and click Add to Schedule to preview the schedule.

> Click Save

Click Next

Remember, the users assigned to the group receive the restrictions associated with that group.



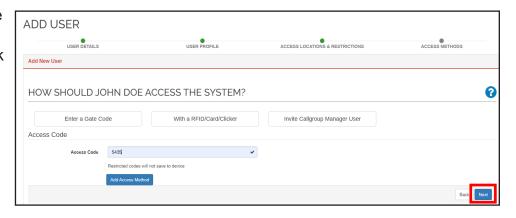
You will be prompted to name the preset. Enter the name and click Save



Restrictions added in the User edit screen only apply to NOTE this individual usual, creating an individual restriction.

6. Enter the information for the access method for the user to access the property. Click Next

> The user can access the system using a Gate Code, RFID/Card/Clicker or Web/ Smartphone Login. Alternatively, you can migrate all access methods from another user.



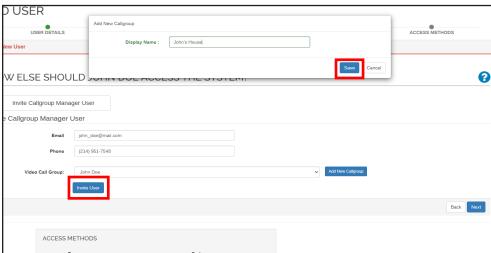
## **CellGate Portal**

7. If you created a Voice or Video Callgroup Manager, you will need to create a Callgroup, and invite the user to join the callgroup.

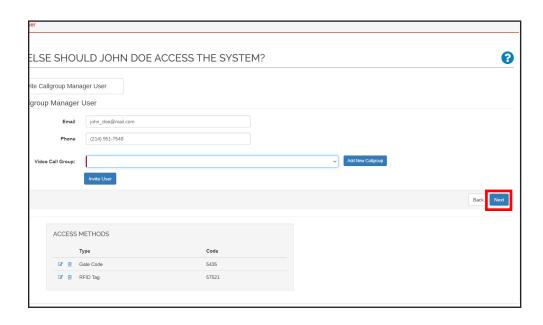


- 8. Enter the Callgroup name. Click Save.
- 9. Enter the user's contact information and click

  + Invite User



10. Click Next



#### How to Edit a User

- Click the User tab and click Manage Users.
- 2. Click the user you want to edit.



MANAGE CALLGROUP

**USERS** 

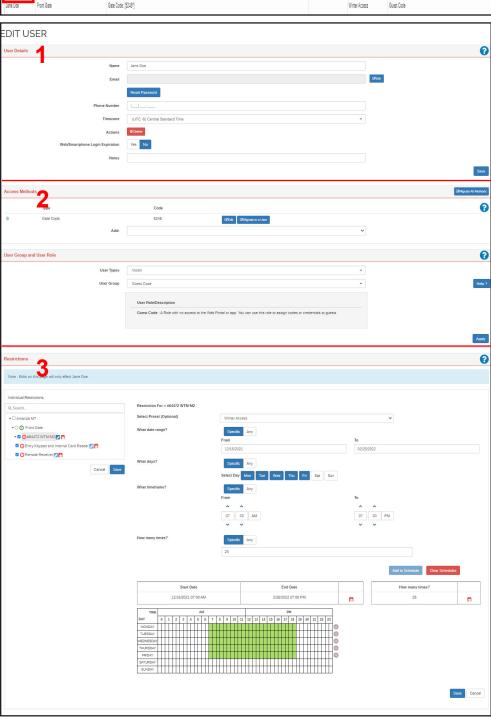
MANAGE USERS

QR CODE

GROUPS

The Edit User screen has 3 sections:

- 1. User Information
- 2. Access Methods, User Group and User Role
- 3. Restrictions



#### 1. User Information

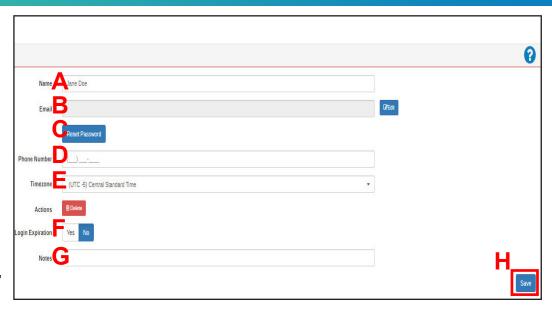
In this section you can update the following:

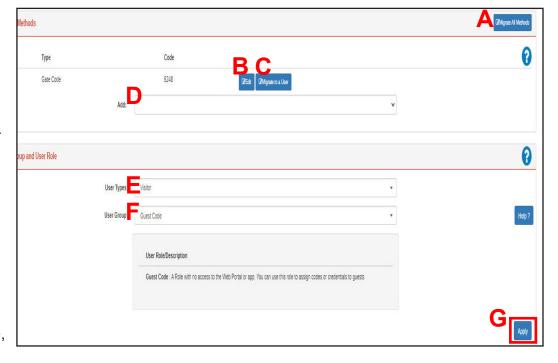
- A. Name
- B. Email
- C. Password
- D. Phone Number
- E. Timezone
- F. Login expiration
- G. Notes
- H. When you're done, click Save.

## 2. Access, User Group, User Role

You can

- A. Migrate all methods
- B. Edit or delete user access
- C. Migrate to a user
- D. Add access method
- E. Change User Types
- F. Change User Group
- G. When you're done, click Apply.



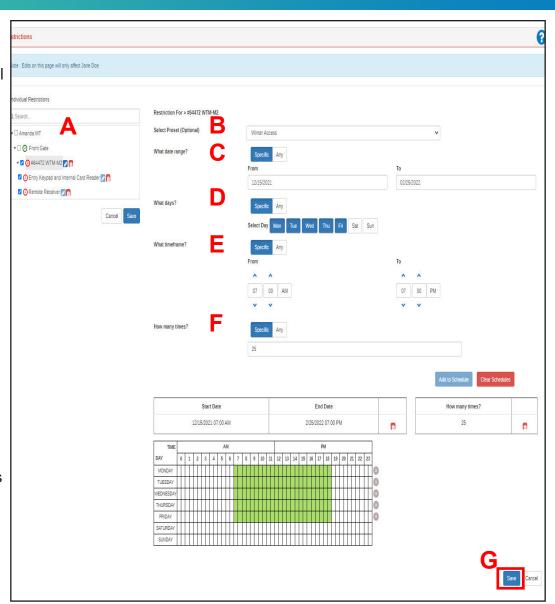


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## 3. Edit the Restrictions

You change the individual user's restrictions, including

- A. Properties and locations restrictions apply to
- B. Apply a preset
- C. Date range for restrictions
- D. Days to allow access
- E. Timeframe during which access is allowed
- F. Number of times access is permitted
- G. When you have completed all edits to restrictions, click Save.



## **QR Codes**

#### What is a QR Code?

A QR code is a barcode that can be shared via cellphone. Scanning the QR code allows visitors to access the property.

Visitors receive a QR code on their cellphones via text when the invite is sent. At the time of an event, a visitor can scan the QR code and enter the property. A QR code *only* works during the day and times for which it was created.

Administrators can assign QR code permission to a group and create QR code rules.

#### **Access QR Codes**

To access the main page for QR codes, on the portal click the **Users** tab and click QR **Code**.

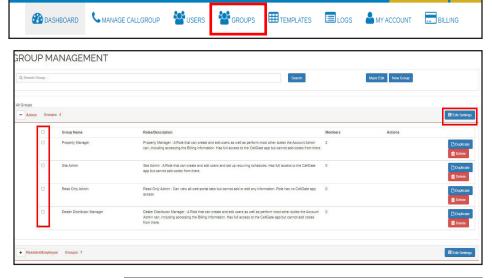
A page displays showing all of your current QR codes. From here, you can add, edit, or inactivate QR codes.



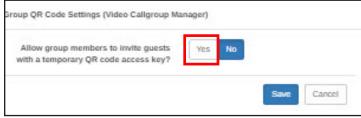
#### **Administrator QR Creation**

To allow group members to create QR codes, follow these steps:

- 1. Click **Groups**.
- Expand the groups headings and click the checkbox for the group or groups for which you want to allow QR Code privileges. Click Edit Settings.



 Click **Yes** to allow members to invite guests with QR codes. The popup expands to allow you to select the options for this group.



MY WEB ACCOUNT LOGOUT

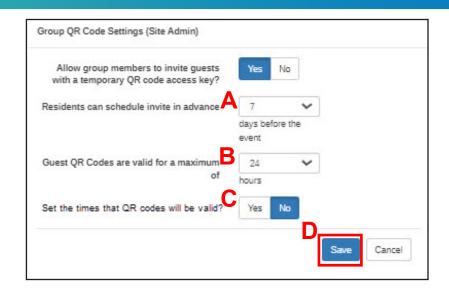
- 4. Select the following:
  - A. Number of days before the event that group members can schedule the invite.
  - B. Select the number of hours for QR codes to remain valid.
  - C. Set the allowed times when the QR code will work, regardless of your the amount of time the code is set to be valid. For example, if you set a 24 hour QR code, then set the "times that QR codes will be valid" from 9-5, the QR codes only work from 9 to 5.
  - D. Click Save

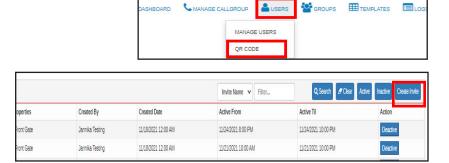
The members of this group can now create QR codes from the CellGate app on their phones.

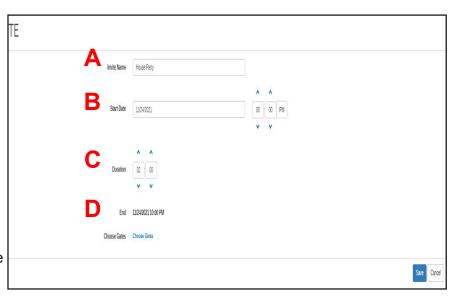
#### **Create QR Code**

To create a QR code for yourself in the portal:

- 1. Click Users; click QR Code.
- 2. Click Create Invite
- 3. Enter the event information.
  - A. For *Invite Name*, enter a unique name for the event.
  - B. For *Start Date*, enter the event date, then select the time the event will begin.
  - C. For *Duration*, set the amount of time the event will last. End time auto-populates.
  - D. Click Choose Gates.







4. Click the checkbox for the gate or gates where visitors with the QR code can enter. Click Select.



End 11/24/20/21 10:00 PM

Choose Gates Choose Gates

Save Carcel



The invitation is added to the Temporary Invites screen.

## **User QR Codes**

Users can create their own QR codes in the CellGate app.

1. Tap New Invite.



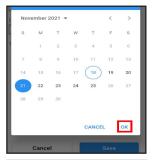




2. Tap Enter Invite Name.

3. Enter the invite name. Click Save.

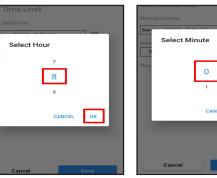
4. Choose the day of the event. This is the day the QR code will be valid. Click **OK**.



5. On the clock, tap the time you want the event to start. Click **OK**.



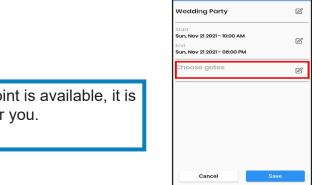
- 6. Choose the number of hours you want the event to last. Click **OK**.
- 7. Choose the number of minutes you want the event to last. Click **OK**.



8. Click Save.



9. Tap Choose gates.



NOTE If only one QR access point is available, it is automatically selected for you.

10. Select the gates you want visitors with the QR code to use. Click **Save**.

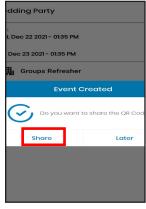


11. A popup asks if you want to share the QR code. Click **Share**.



QR codes can only be used on devices with a touch screen.

12. Tap **Share Invite**. Your contacts will open. Select the people you want to share QR code with.





#### **Invite Received**

Guests receive this message on their phones.

Press Guest QR code On the entry unit when you arrive at the property.

Press the invite link below, and present the QR code to the entry unit.

<a href="http://www.linkforQR.com">http://www.linkforQR.com</a>

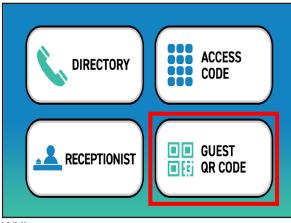
### **Use QR Code with CellGate Hardware**

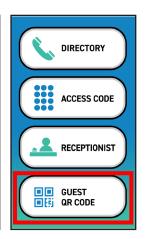
After the guest has received a QR code from a CellGate user, they're ready for the event. Guests should travel to the property at the time of the event and follow these steps to enter the property.

1. Open the QR code on your phone so that it is visible in the center of your phone screen.



On the Cellgate device, WXL or 480, press the QR code button.

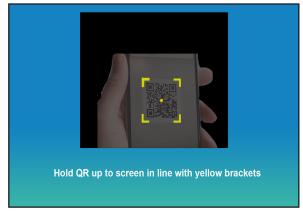


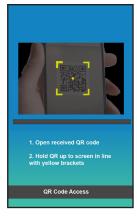


WXL

Hold your phone screen to the device.

The system reads the QR code and opens the gate or door.





**WXL** 

## **Groups**

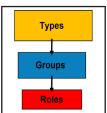


#### **Overview**

Groups allow you to create users with the same permissions and restrictions. With groups, you can edit user information quickly.

We provide preset groups that contain common restrictions. You can also create new groups based on your needs. Groups include web and app access and restrictions for property access.

## **Hierarchy Breakdown**

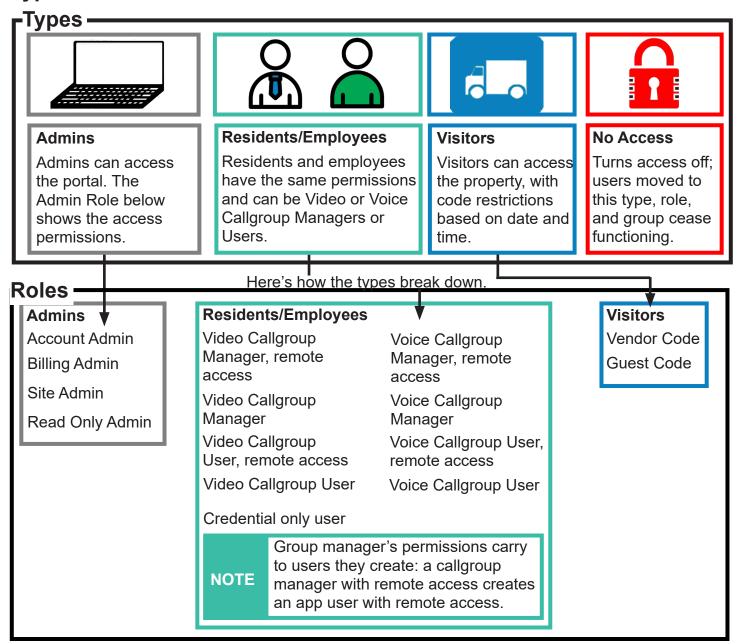


**Types** are categories of users with similar permissions and restrictions based on intended use.

**Groups** contain users with the same permissions and restrictions, including app and portal access.

**Roles** are the most specific: roles give specific information about individual users.

## Types and Roles



## **Types and Roles: Further Details**

These tables describe the permissions each user type and user role provide.

Type: Admin Account Admin Sees and edits everything						
					Can  Use CellGate App Import Callgroups Momentarily Open Gate on Demand Momentarily Open Gate During Call Hold Open Gate Take Photos Manage Web Portal Manage Billing Manage Callgroups Manage Devices Manage Schedules Manage Restrictions Manage Permissions Manage Users	Can't
					Billing	Admin
Manages Billing and can only see Billing						
<b>Can</b> Manage Billing	Can't View or edit Groups, Devices, Schedules, Restrictions, Access, Permissions, Users					
Site A	Admin					
Accesses, edits all pages, <i>but</i> Billing						
Can Use CellGate App Momentarily Open Gate on Demand Momentarily Open Gate During Call Hold Open Gate Take Photos Manage Callgroups Manage Groups Manage Devices Manage Devices Manage Schedules Manage Restrictions Manage Access Codes Manage Permissions Manage Users	Can't Access or edit billing information					
Read Only Admin						
Sees content on the portal but can't edit						
Can View Callgroups View Groups View Templates View Schedules View Account Information View Users View Restrictions View Billing Information	<b>Can't</b> Edit any information in the portal					

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## **Type: Resident and Employee**

## **Video Callgroup Manager, Remote Access**

Has portal login, app access, opens gate from app; can see and create users in their callgroup

#### Can

Use CellGate App Momentarily Open Gate on Demand Momentarily Open Gate During Call Hold Open Gate Manage their Callgroup

#### Can't

Manage Billing
Manage Schedules
Manage Restrictions
Manage Groups
Manage Access Codes
Manage Permissions
Manage Users

#### **Voice Callgroup Manager, Remote Access**

Has portal login, app access, opens gate from app; can see and create users in their callgroup

#### Can

Use CellGate App Momentarily Open Gate on Demand Momentarily Open Gate During Call Hold Open Gate Manage their Voice Callgroup

#### Can't

Manage Billing
Manage Schedules
Manage Restrictions
Manage Groups
Manage Access Codes
Manage Permissions
Manage Users

### Video Callgroup Manager

Has portal login, app access, can see and create users in their callgroup

#### Can

Use CellGate App
Momentarily Open Gate on Demand
Momentarily Open Gate During Call
Manage their Callgroup in Web Portal
Manage Callgroup Users in Web Portal

#### Can't

Hold Open Gate
Take Photos
Manage Web Portal
Manage Billing
Manage Other Callgroups
Manage Devices
Manage Schedules
Manage Restrictions
Manage Access Codes
Manage Permissions

Manage Other Users

Import Callgroups

Import Callgroups

#### **Voice Callgroup Manager**

Has portal login, app access, can see and create users in their callgroup

#### Can

Use CellGate App
Manage their Voice Callgroup in Web Portal

#### Can't

Hold Open Gate
Take Photos
Manage Web Portal
Manage Billing
Manage Other Callgroups
Manage Devices
Manage Schedules
Manage Restrictions
Manage Access Codes
Manage Permissions

## Video Callgroup User, Remote Access

Has app access; can answer calls and open gate from app

#### Car

Use CellGate App Momentarily Open Gate on Demand Momentarily Open Gate During Call

#### Can't

Access the Web Portal

Manage Other Users

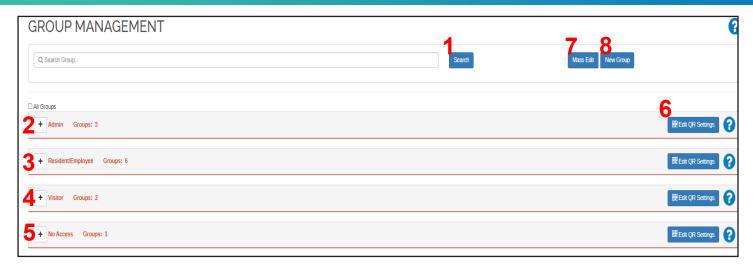
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Type: Resident and Employee, continued				
Voice Callgroup User, Remote Access				
Has app access; can answer calls and open gate f	rom app			
Can Use CellGate App Momentarily Open Gate on Demand Momentarily Open Gate During Call	<b>Can't</b> Access the Web Portal			
Video Callgroup User				
Has app access; can answer calls from app				
<b>Can</b> Use CellGate App	<b>Can't</b> Access the Web Portal			
Voice Call	group User			
No app or portal access				
<b>Can</b> Use CellGate App	<b>Can't</b> Access the Web Portal			
Credential	Only User			
Must use gate code to enter property				
<b>Can</b> Use a code to enter the property	Can't Access the Web Portal Access the CellGate App			
Type: '	Visitor			
Guest	Code			
Must use gate code to enter property				
<b>Can</b> Use a code to enter the property	<b>Can't</b> Access the Web Portal Access the CellGate App			
Vendo	r Code			
Must use gate code to enter property				
<b>Can</b> Use a code to enter the property	Can't Access the Web Portal Access the CellGate App			
Type: No Access				
No Access				
All access permissions removed				
Can	<b>Can't</b> No permissions: all permissions removed			

No one can edit or remove someone in the group above them. For example, a Site Admin cannot edit or remove the Account Admin.

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## **CellGate Portal**



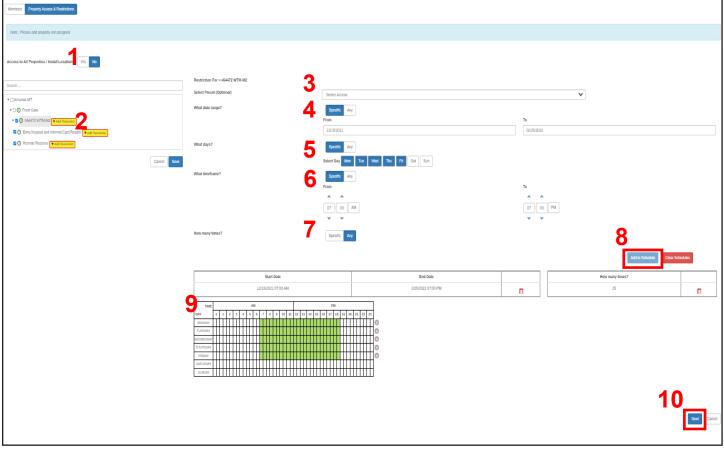
Groups provide you with options, which are identified below.

- 1. You can search for a group by name. Enter the term and click Search.
- 2. Click + to expand Admin, which shows all your admin groups.
- 3. Click + to expand Resident/Employee, which shows all the groups of residents and employees.
- 4. Click + to expand the Visitor groups, which shows the Visitor groups. Visitor groups include Guests and Vendors.
- 5. Click + to expand No Access, which includes members of the No Access group.
- 7. Select a group or groups and click Mass Edit to edit the group to add restrictions.
- 8. Click New Group to create a new group.

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## **Restrictions and Groups**

Use restrictions to limit access by date, time, property location, and number of uses. Restrictions are specific to the credentials a user has: they determine how many times and when a user can access the property. Restrictions are associated with their affiliated code, clicker, ID, or remote. Note that you can add restrictions from the group side or add a restriction specific to a user.



### **How to Create Restrictions**

- 1. For Access to all Properties/Install Locations, choose Yes or No.
- 2. For the devices the restrictions should apply to, click + Add Restriction.
- 3. For Select Preset, select a template from the dropdown or build your own restrictions.
- 4. For *Date Range*, click Specific, and enter the desired dates for the restrictions.
- 5. For Days, click Specific, and select the days the user can access the property.
- 6. For Timeframe, click Specific, and add the times the user can access the property.
- 7. For *How many times*, click Specific, and enter the number of times you want the user to be allowed on the property.
- 8. Click Add to Schedule to see a preview of the schedule.

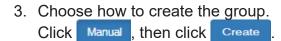
NOTE The number of times applies to all of this user's credentials.

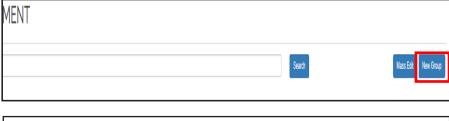
- 9. The preview appears in the calender below.
- 10. Click Save to save the restrictions. You will be prompted to save and name these restrictions.

NOTE Restricted codes are saved in the cloud. Your system must have network access for this code to work.

# Create a Group with Manual Setup

- 1. Click the **Groups** tab.
- 2. Click New Group

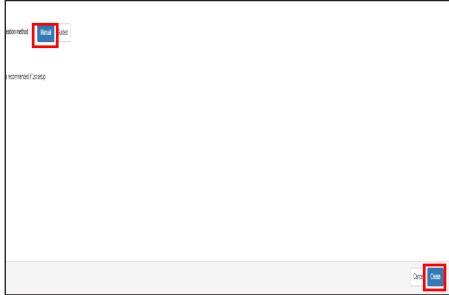




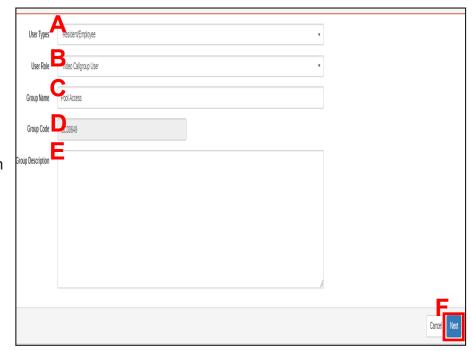
■ TEMPLATES ■ LOGS ■ MY ACCOUNT

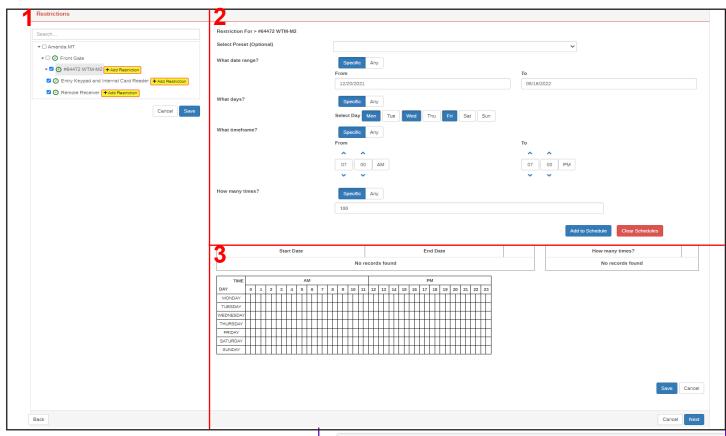
USERS

**GROUPS** 



- 4. Enter group information:
  - A. User Type
  - B. User Role
  - C. Group Name.
  - D. The Group Code is automatically generated.
  - E. If you want, add a Description of the group; this field is not required.
  - F. Click Next



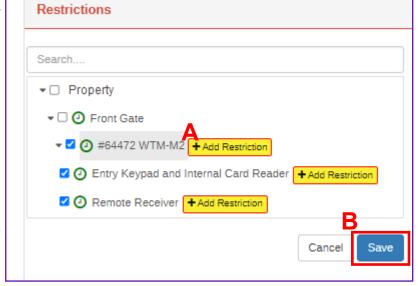


The Apply restrictions page has three parts.

- 1. Property, Location Access
- 2. Create Restrictions (top half of page)
- 3. Preview (bottom half of page)

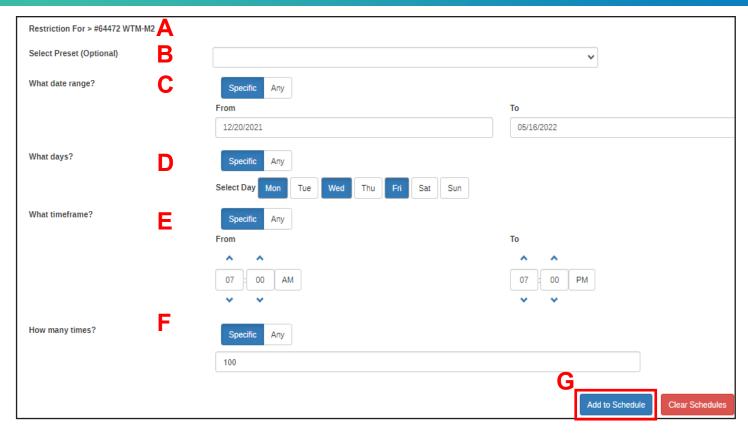
## 1. Property, Location Access

- A. Select checkboxes for property, devices, and gates to which you want to add restrictions; click
   + Add Restriction
- B. If you only want to create restrictions for the property the user can access, Click Save.



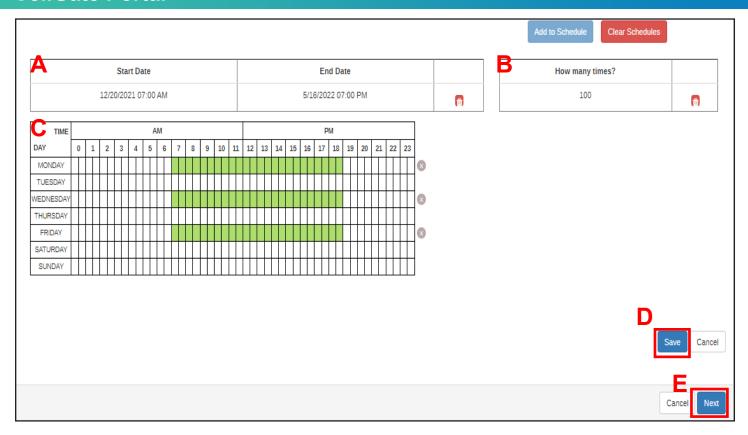
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## **CellGate Portal**



#### 2. Create Restrictions

- A. You see the location the restrictions apply to.
- B. If a preset template applies, select it from the dropdown menu.
- C. To apply a date range for the restrictions, click specific and choose the start and end dates for the restrictions to apply.
- D. To choose the days of the week to allow access, click Specific . Choose the days to allow access.
- E. To set a timeframe, click Specific, and select the times to allow property access, such as *From* 9:00 AM *To* 5:00 PM.
- F. To set the times to allow access, click specific and enter the number of times to allow access to the property.
- G. Click Add to Schedule. You'll see a preview of the changes.

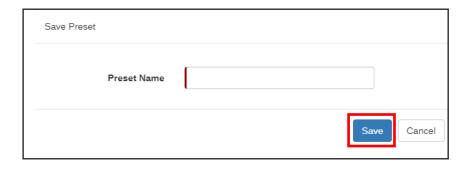


You'll see a preview of your restrictions.

- A. The Start and End Dates for the schedule display.
- B. "How many times?" is the number of entries allowed.
- C. The schedule preview displays in green.
- D. Click Save to save the restriction.
- E. Click Next

NOTE Restrictions added at the group level apply to everyone in the group.

4. If you've created new restrictions, enter the Preset Name. Click Save



NOTE

Once saved, you can apply the restriction to other groups and users.

## **CellGate Portal**

 To migrate existing members to the group, click
 + Select Group

NOTE

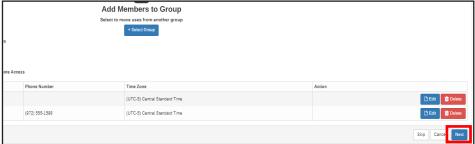
You can skip this step and return to the group later.

6. Click the checkbox or checkboxes for the user group or groups you want to migrate and click Add.





7. You'll see the users in the group. Click Next.



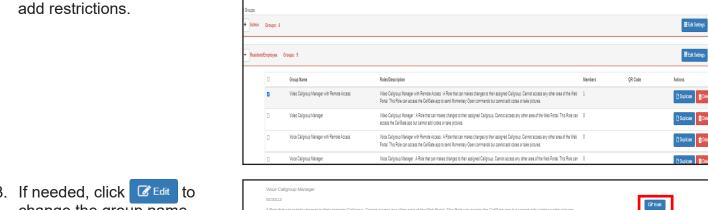
8. Review the Group Information. If you're happy with the group information, click Create.

If you want to discard changes and start again, click *Cancel*.



## Add or Edit Restrictions for an Existing Group

- 1. Click the **Groups** tab.
- 2. Click the checkbox for the Group to which you want to



MANAGE CALLGROUP

3. If needed, click Edit to change the group name.





GROUPS

## TEMPLATES

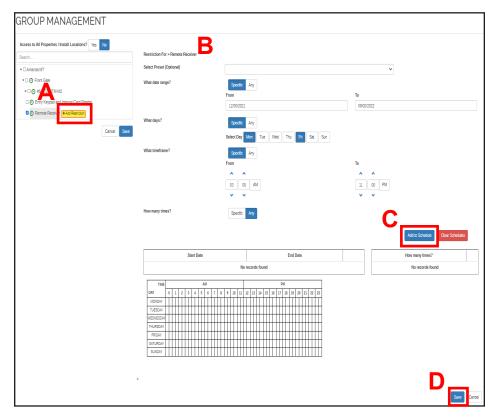
LOGS

BILLING

USERS

- 5. Complete the restrictions.
  - A. Click + Add Restrictions to add click + Add Restriction to a specific port.
  - B. You'll see the port you selected next to Restriction For >.
  - C. Enter the restrictions as needed. Click Add to Schedule to see a preview of the schedule in green.
  - D. Click Save

You will be prompted to save and name the new preset.



### **Templates**

### **Schedule Template**

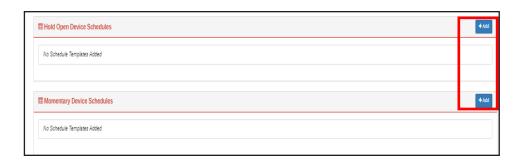
A schedule template sets the device's hold open schedule. A Schedule Template can apply to weekly recurring, alternate, or blackout schedules. You can apply the template to each entry point.

The options within a schedule template are Hold Open and Momentary Device Schedules.

1. Click **Templates** and **Schedule Template**.



2. Click +Add for the type of schedule template to add.

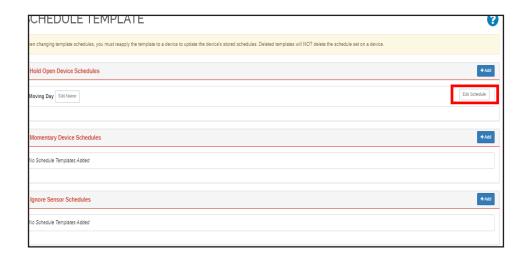


3. Enter schedule name, and click



4. For the schedule name you just created, click

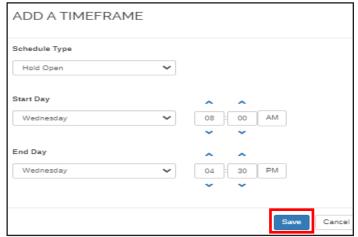
Edit Schedule



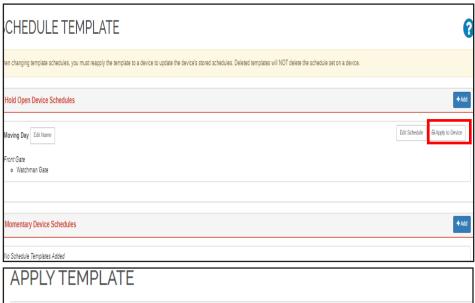
### **CellGate Portal**

- 5. Click + Add for a Weekly schedule or +Add for Alternative Schedules & Blackouts. An Alternative Schedule is a one time schedule for the gate. A Blackout Schedule ignores all other schedules on the device.
- 6. Enter the Start Day and Time and End Day and Time. Click Save

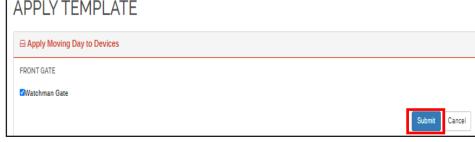




7. Click Apply to Device to reapply the template to the device, which updates the device's stored schedules.



8. Select the device to apply the template to and click Submit

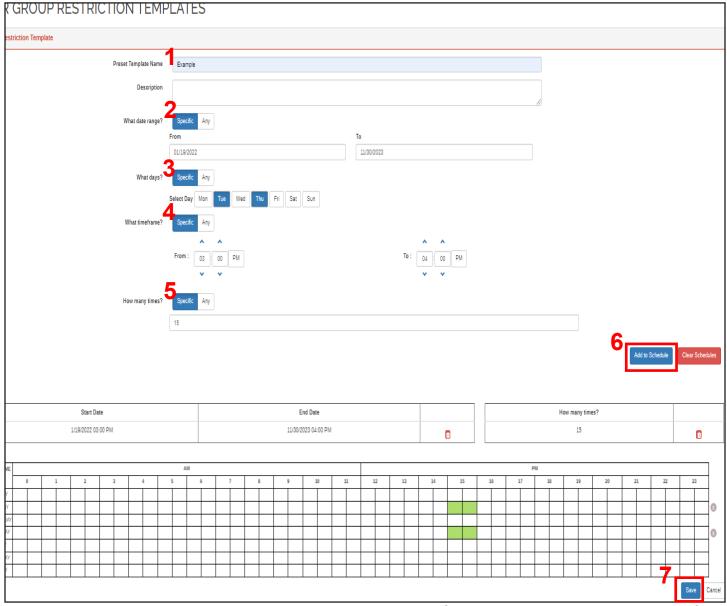


Any time you change the templates, you must reapply them. Even deleted **NOTE** templates need to be applied to devices for the deleted schedule to be removed from the gate.

### **User Group Restriction Template**

To access the User Group Restrictions Template, click **Templates**, then click **User Groups Restrictions Template**. You'll create a template to apply to users and groups.



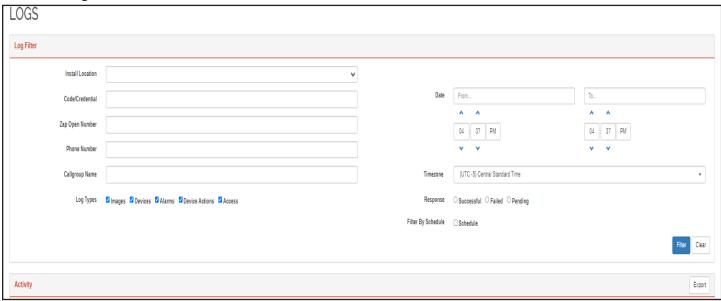


- Enter the Preset Template Name, which you'll use to identify the template, and a Description, if you want, but a description is not required.
- 2. For the date range, click specific and select the *From* and *To* dates. To allow access on all dates, click *Any*.
- 3. For the days, click specific and select days of the week you want to create access restrictions. To allow access on any day, click *Any*.
- 4. For the time frame, click specific, and set the *To* and *From* times to set up restrictions. To allow access at all times, click *Any*.
- 5. To limit the number of times to allow access to the property click specific. Enter the number of times you want to allow access. To allow an unlimited number of accesses, click *Any*.
- 6. Click Add to Schedule to see a preview of the restrictions in the calendar below.
- 7. Click save the template.

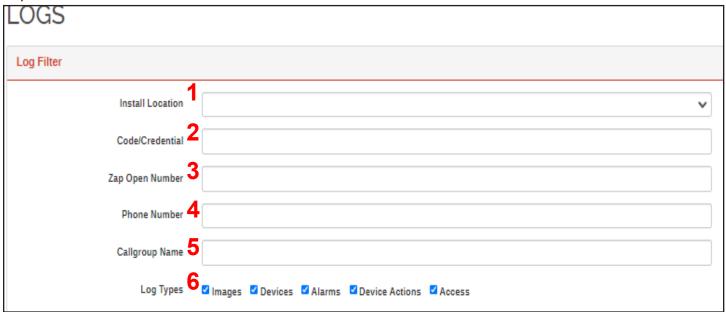
### Logs

To see the logs for your CellGate devices, click **Logs** on the navigation bar.

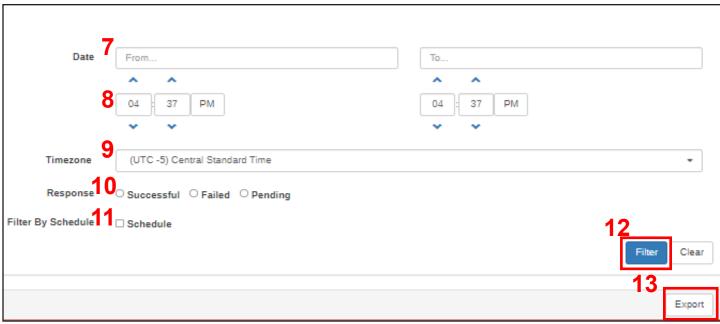




The Log Filter allows you to specify how your information displays in the portal. The Logs options are explained below.



- 1. Install location is the gate or door where the device is located.
- 2. Code or credentials searches for information according to the user's credentials.
- 3. Zap Open Number searches by the Zap Open Number. Some accounts do not have access to this feature.
- 4. Phone Number displays results associated with the phone number.
- 5. Callgroup Name allows you to see activity according to the name that displays on the Cellgate device.
- 6. For Log Types, select the checkbox for the type of logs you want to display, including Images, Devices, Alarms, Device Actions, Access, and QR codes.



The Log Filter allows you to specify how your information displays in the portal. Fill out the information for the item you want to search.

- 7. The selection for Dates displays the dates for which you want to view logs.
- 8. Times specifies that you only want to see the activity between certain times, for example from 8 to 10 pm.
- 9. Timezone specifies the timezone of the device.
- 10. Responses lets you specify whether access was successful, failed, or pending. Failed indicates a transaction that was not successful.
- 11. Filter by schedule lets you view data by the schedule name, so you see all results for one schedule, but only for that schedule.
- 12. Click Filter to filter according to the options you've selected.
- 13. Click Export to export logs to a spreadsheet. The export function exports up to 500 transactions.

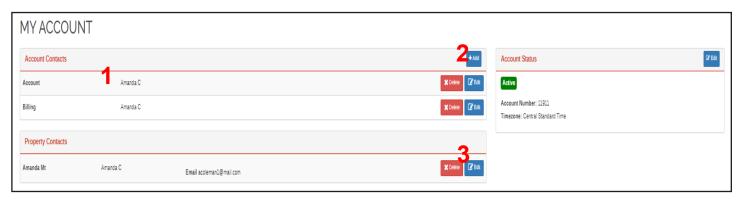
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## **CellGate Portal**

## **My Account**

To see your account

information, click My Account on the Navigation Bar.



- 1. Your primary account contact displays.
- 2. Click + Add to add another contact.
- 3. Click to update contact information.

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### **Billing**

 ⚠ DASHBOARD
 MANAGE CALLGROUP

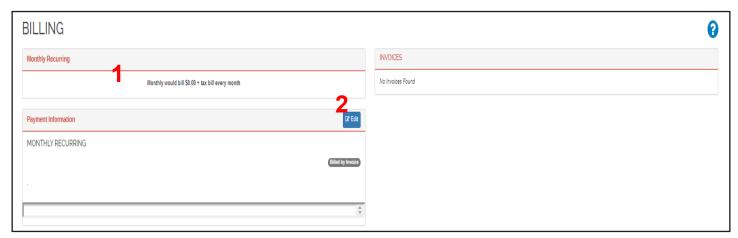
 WANAGE CALLGROUP
 Superior

 GROUPS
 TEMPLATES

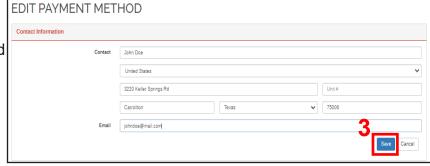
 TEMPLATES
 LOGS

 MY ACCOUNT
 Embilling

To view your billing information, click **Billing** on the navigation bar.



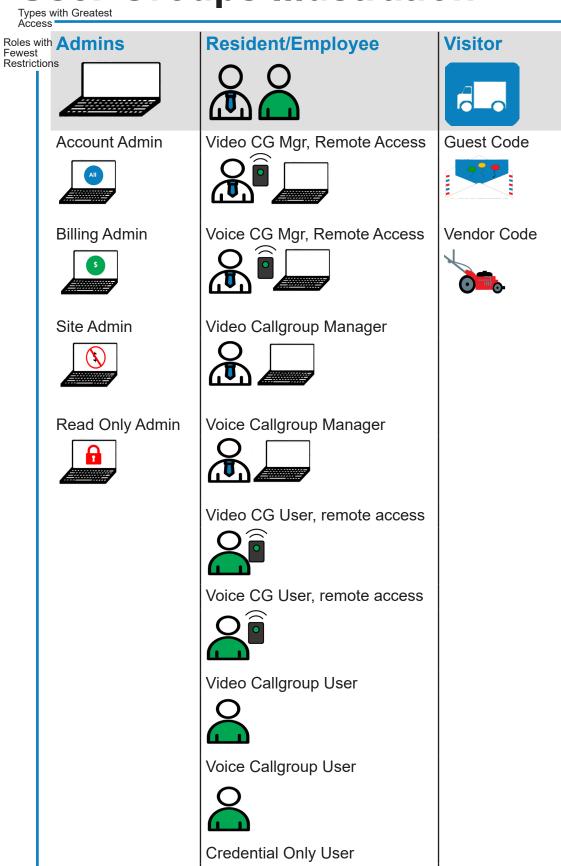
- The screen shows your Monthly Recurring Bill.
- 2. Click to update your credit card information, which opens the *Edit Payment* screen. You can update your contact information, including the billing address and email, where invoices and receipts are sent,



3. Click Save .

# **User Groups Illustration**

Types with Most Limited Access



####



Roles with Most Restrictions

# **Glossary: Group Terms**

#### **Admins**

**Account Admin:** Account owner; has full Admin privileges in entire portal and app, and can create codes from the CellGate app.

**Billing Admin:** Can input and update Billing information, including credit card info. Has no app permissions and can't see the rest of the web portal.

**Site Admin:** Role that can create and edit users and perform most duties of the Account Admin, but can't access Billing information. Has full access to the app, but can't add codes.

**Read Only Admin:** Can view all portal tabs except Billing, but can't add or edit information. Has no CellGate app access.

### Residents/Employees

**Video Callgroup Manager with Remote Access**: Role that can make changes to assigned callgroup. Can't access other areas of portal. Role can access app to send Momentary Open commands, but can't add codes or take pictures.

**Voice Callgroup Manager with Remote Access**: Role that can make changes to assigned callgroup. Can't access other areas of portal. Role can access app to send Momentary Open commands, but can't add codes or take pictures.

**Video Callgroup Manager:** Role that can make changes to assigned Callgroup. Can't access other areas of Web Portal. Role can access the app, but can't add codes or take pictures.

**Voice Callgroup Manager:** Role that can make changes to assigned Callgroup. Can't access other areas of Web Portal. Role can access the app, but can't add codes or take pictures.

**Video Callgroup User with Remote Access:** Role that can't access the portal. Can access app to send Momentary Open commands, but can't add codes or take pictures.

**Voice Callgroup User with Remote Access:** Role that can't access the portal. Can access app to send Momentary Open commands, but can't add codes or take pictures.

**Video Callgroup User:** Role that can't access the portal. Role can access app, but can't send remote commands, take pictures, or add codes. Voice Callgroup User

**Voice Callgroup User:** Role that can't access the portal. Role can access app, but can't send remote commands, take pictures, or add codes.

**Credential Only User:** Role can't access the portal or app. You can assign a code or credential to this user, and you can add their phone number to a voice callgroup.

#### **Visitor**

**Guest Code:** Role with no access to portal or app. You can use this role to assign codes or credentials.

**Vendor Code:** Role with no access to portal or app. You can use this role to assign codes or credentials to vendors.

#### No Access

**No Access:** Role with no access to the portal or app. Any credentials a user has when moved to this Role are invalidated, so codes and credentials assigned to users under this Role will not work.

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# **Glossary: Other Definitions**

Access Point A gate or a door.

Account [My Account]

The information about your CellGate account, including your primary contacts.

Alternative Schedule

One-time schedule. You'll only run this schedule once.

**App** 

The Cellgate app; when downloaded on a cellphone, users can use the app to open the gate.

Blackout Schedule A blackout schedule prevents a schedule from running.

Billing

The contact and credit card information for your CellGate account.

Callgroup
[Manage Callgroup]

The group of people who are called simultaneously when a guest arrives at the gate.

**Credentials** 

The way someone physically accesses the property. Credentials can be a code, Wiegand card, RFID tag, or clicker.

**Dashboard** 

The first page you see when you log in to the portal; this page gives several common options portal.

**Groups** 

Combinations of users who have the same permissions and access.

Hold Open Schedule

Sets times when the gate will be held open.

Logs

Records from the CellGate devices.

Momentary Open Schedule

Sets a specific time for the gate to open. The gate will only open once, and will not remain open.

**Navigation Bar** 

The icons at the top of the screen; these are the main options to access the portal.

**Schedules** 

Set the time when gates are opened or closed.

**Templates** 

Hold open schedules or restrictions that you can apply to a group.

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## **CellGate Portal**

**User** An individual with access to CellGate systems; this individual may

have access to the app, the portal or both.

Web Portal Online access to CellGate; This is the website you use to manage your

account.

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