

How to Customize Settings for FRONTSTEPS Visitor Management

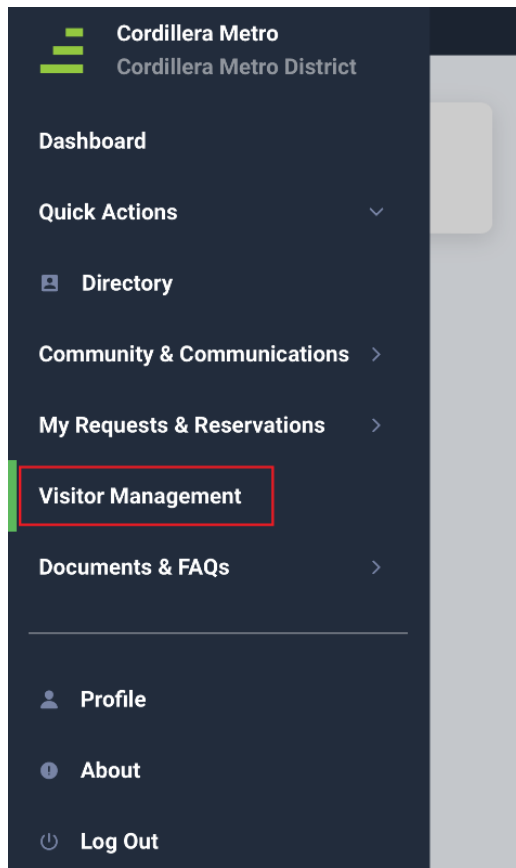
Log in to the FRONTSTEPS resident dashboard on the FRONTSTEPS Community app (at right) -OR- on a desktop browser (directions below).

FRONTSTEPS Community App Directions:

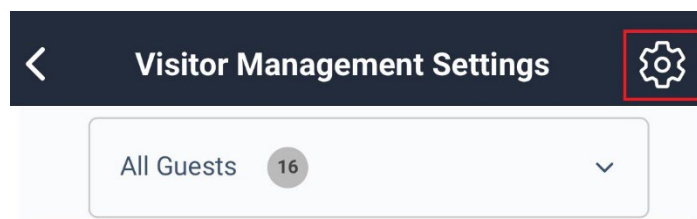
Sign in to the app using the email and password you chose when setting up your account from your personalized set-up link.



Select **VISITOR MANAGEMENT** from the dashboard menu. From here, choose your property address.



Then, click the **settings wheel** (top right) to view settings options.



NOTIFICATION SETTINGS:

The Notifications Settings allow property owners to decide how they prefer to be informed when a when an invited guest registers or enters the community (email or text).

To Set Notification Settings:

- Select **Notification Settings** from the Visitor Management Settings menu.
- Choose notification preferences (email and/or text).
- Choose text message number from the account options drop-down, and choose the provider.
- Select **Save**.

The screenshot shows the 'Notification Settings' screen in a mobile app. At the top is a dark header with a back arrow and the title 'Notification Settings'. Below the header, there are two sections: 'Guest Registration' and 'Guest Entry'. Each section has two toggle switches for 'Email' and 'Text Message'. At the bottom, there are two dropdown menus: 'Text Message Number Select Phone' and 'Provider Select Provider'.

CALL PRIORITY SETTINGS:

Call Priority allows property owners to set the order of phone numbers by which they would like to be contacted if gate agents need to call. The options for setting call priority are linked to the phone numbers for **any** person in the household. The numbers available to select will only be the phone numbers already listed in Account Basics.

To Set Call Priority:

- Select **Call Priority** from the Visitor Management Settings menu.
- **Select phone numbers from the drop down menu** in order of call priority. **Note:** *Users cannot ADD phone numbers in this area. Phone numbers that have previously been added to their Account Basics will be visible in the drop down.*
- Select **Save**.

The screenshot shows the 'Call Priority' screen in a mobile app. At the top is a dark header with a back arrow and the title 'Call Priority'. Below the header, there is a subtitle 'Prioritize numbers to be contacted by community staff'. The main content area lists four call priority levels: 'Call Priority 1', 'Call Priority 2', 'Call Priority 3', and 'Call Priority 4'. Each level has a 'Select Phone' dropdown menu next to it.

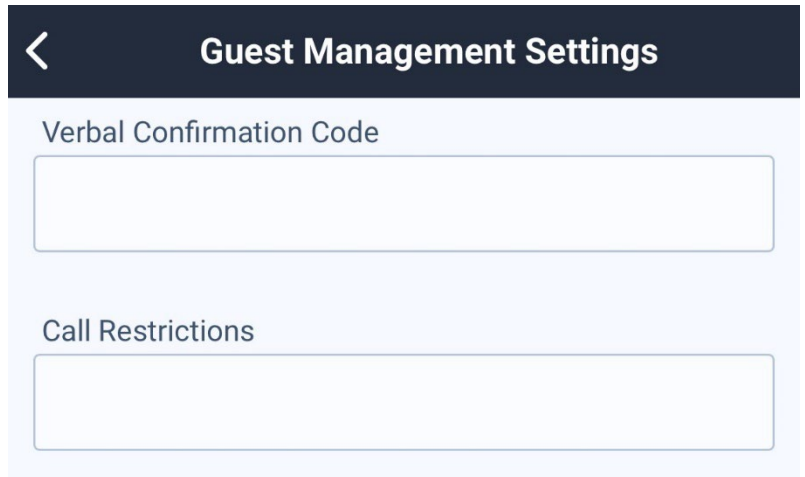
GUEST MANAGEMENT SETTINGS:

Verbal Code and Call Restrictions

Guest Management Settings include the Verbal Code, or verbal security code, for the homeowner. The Call Restrictions field is a text field that property owners can use to communicate preferences with gate agents. For instance, they may say, *“Please do not call after 9:00 p.m., or use Call Priority #2 on Tuesdays.”*

To Set Guest Management Settings:

- Select **Guest Management** from the Visitor Management Settings menu.
- Enter what you would like to use as your **Verbal Confirmation Code**.
- Enter any **Call Restriction** instructions.
- Select **Save**.

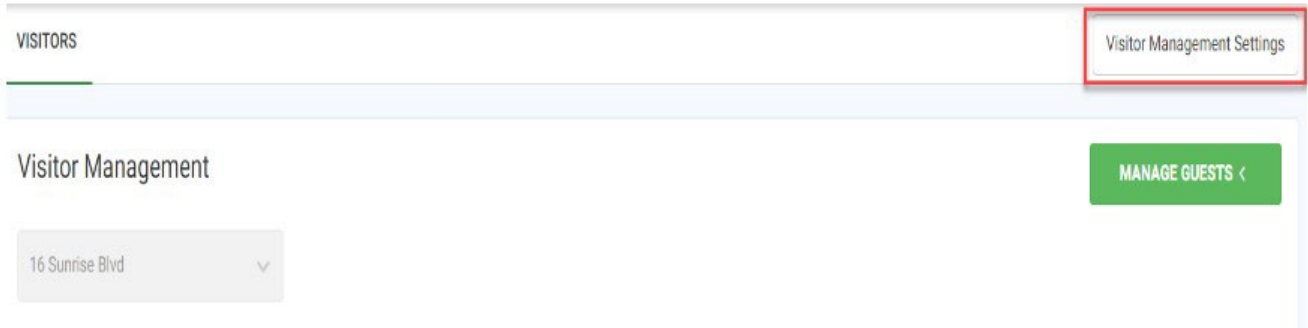


The screenshot shows a mobile application interface for 'Guest Management Settings'. At the top, there is a dark blue header with a white back arrow on the left and the title 'Guest Management Settings' in white. Below the header, the form is light blue. It contains two sections: 'Verbal Confirmation Code' with a large empty text input field, and 'Call Restrictions' with another large empty text input field.

FRONTSTEPS Desktop Browser Access Directions:

Sign in to the app using the email and password you chose when setting up your account from your personalized set-up link. Access the login page on a desktop using Cordillera's sign-in link: http://cordillerametrodistrict.frontsteps.com/users/sign_in.

Select **VISITOR MANAGEMENT** from the dashboard menu.



From here, **select Visitor Management Settings.**

NOTIFICATION SETTINGS:

The Notifications Settings allow property owners to decide how they prefer to be informed when a when an invited guest registers or enters the community (email or text).

To Set Notification Settings:

- Select **Visitor Management Settings.**
- Check notification preference (email and/or text).
- Select **Save Changes.**

Notification Settings

Guest Registration

Receive confirmation when a guest registers.

Email



Text



Guest Entry

Receive confirmation when guests have entered the community.



Text Messages Number

1555555555



Provider

Alltel



Save Changes

CALL PRIORITY SETTINGS:

Call Priority allows property owners to set the order of phone numbers by which they would like to be contacted if gate agents need to call. The options for setting call priority are linked to the phone numbers for **any** person in the household. The numbers available to select will only be the phone numbers already listed in Account Basics.

To Set Call Priority:

- Select **Visitor Management Settings**.
- Scroll to the **Call Priority** area.
- **Select phone numbers from the drop down menu** in order of call priority. **Note:** *Users cannot ADD phone numbers in this area. Phone numbers that have previously been added to their Account Basics will be visible in the drop down.*
- Select **Save Changes**.

Call Priority

1st

2nd

3rd

4th

Save Changes

GUEST MANAGEMENT SETTINGS:

Verbal Code and Call Restrictions

Guest Management Settings include the Verbal Code, or verbal security code, for the homeowner. The Call Restrictions field is a text field that property owners can use to communicate preferences with gate agents. For instance, they may say, *“Please do not call after 9:00 p.m., or use Call Priority #2 on Tuesdays.”*

To Set Guest Management Settings:

- Select **Visitor Management Settings**.
- Scroll to the **Guest Management** area.
- Enter what you would like to use as your **Verbal Code**.
- Enter any **Call Restriction** instructions.
- Select **Save Changes**.

Guest Management Settings

Verbal Code

Call Restrictions

Save Changes

Get more FRONTSTEPS how-to and support at www.CordilleraLiving.com/Frontsteps.