

# User Portal Guide

The Single Tenant portal offers you many options to help you manage your security. This guide will walk through all the options on the portal.

## Navigation Bar



The navigation bar displays at the top of every page. You use the navigation bar to access options on the portal. The definitions of the entires on the navigation bar are below.

## Dashboard



The Dashboard is the first page you see when you log in. The dashboard allows access to other areas and common tasks.

## Manage Callgroup



You'll use Manage Callgroup to manage the callgroups you've created.

## Users



The Users section shows you the users in your system. You can add users and edit user permissions.

## Logs



The Logs page show the recent logs. The logs record activity by device. From this page you can determine how you'll see the logs, track the information about who has accessed your property, when they access it, and how they gained access.

## My Account

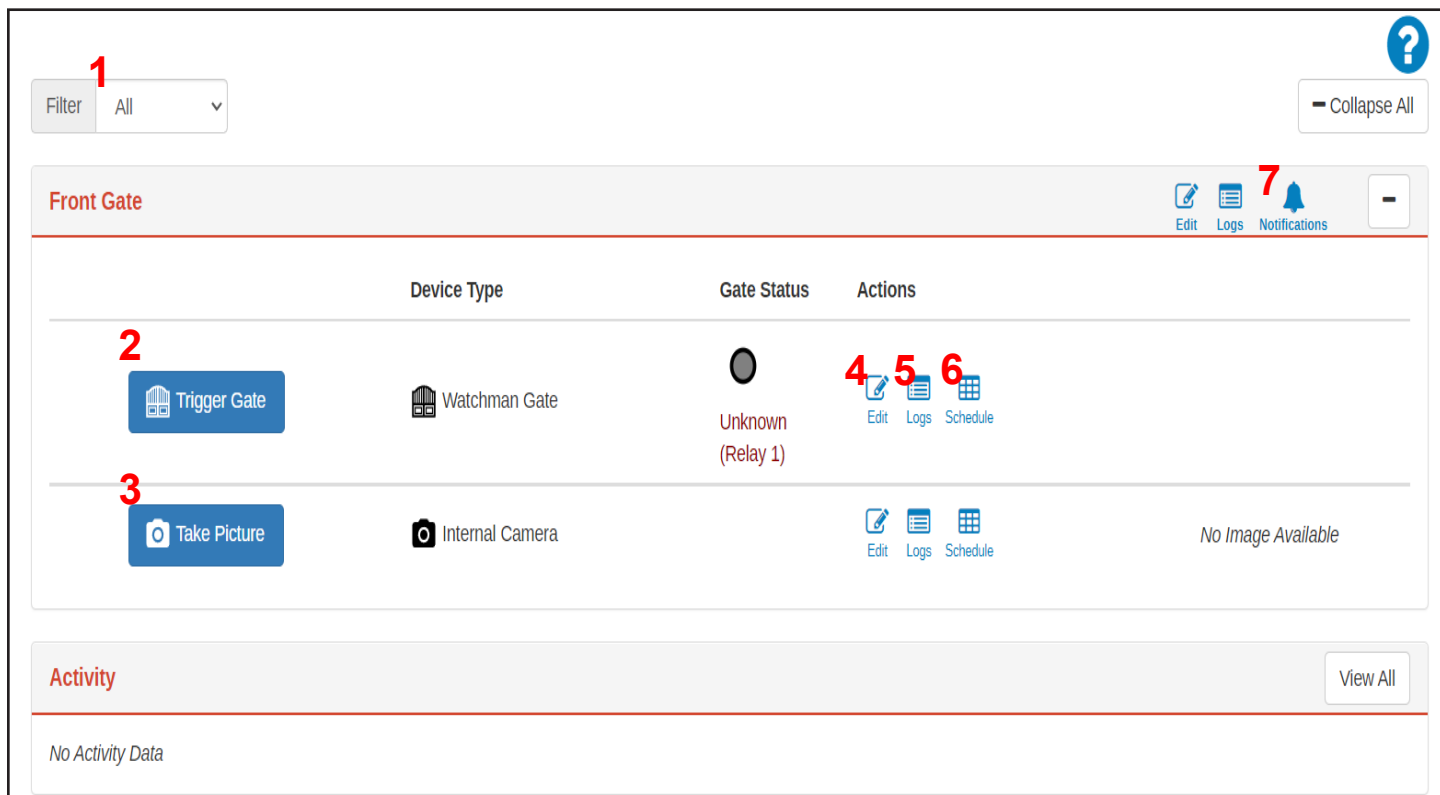


The My Account tab opens the My Account page. This page holds information about your account, including your username and address.

## Billing


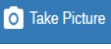






The Billing page allows you to edit your billing information and allows you to review your past invoices.



## Dashboard

The Dashboard is the first page you see when you log in. The dashboard offers you access to other areas and an easy way to perform common tasks.

1. Filter: if you have multiple install locations, you can filter to a specific install location.
2. : sends a signal to open the gate
3. : takes picture from the device at the gate
4. Edit : edit install information
5. Logs : shows logs for this device
6. Schedule : create or edit the schedule for open and close for this gate or door.
7. Notifications : allows you to set up notifications

## Manage Callgroup

Depending on your account, you can manage voice or video callgroups.

### NOTE

A callgroup is the group of people who are called simultaneously when a guest arrives at the gate.

**Filter**

**1** Display Name
**2** Address
**3** Phone Number
**4** Select Device

User Login Created:  Active  In Active
 Video Callgroup Active:  Active  In Active

Filter
Clear

---

**Video Callgroups**

Resend Notifications
Copy to Devices
Remove
+ Add

	Display Name	Address	User Login Created	Callgroup Active	Device	Action
<input type="checkbox"/>	John Smith	441 West Street	●	●	1 Device	<span style="background-color: #007bff; color: white; padding: 2px 5px;"><b>8</b> Edit Callgroup</span>

## Callgroups

You can find the callgroups in the portal.

From this location you access callgroups and callgroup functionality. The Filter section lets you select how you want to view the information.

1. Display Name: enter the name of your callgroup.
2. Address: enter the callgroup description you want to search.
3. Phone Number: enter the phone number associated with the callgroup you want to display.
4. Select Device: select the device associated with the callgroup you want to search for from the dropdown menu.
5. Click Filter to filter the callgroups according to your entries.
6. Click Remove to remove the a selected callgroup.
7. Click + Add to add a new callgroup.
8. Click Edit Callgroup to edit the callgroup.

### NOTE

When you receive a call, press \* to open the gate.

## Users

A user is anyone who uses the CellGate service. Users are divided into types and roles.

**User Types** are categories of users with the same permissions and restrictions.

Users can be administrators, who access the online portal; residents (or employees), who can enter the property and can open the gate when contacted by the Cellgate device; or guests, who can only access your property with an assigned code.

A **User Role** creates more specific restrictions within a the User Type. A role give specific information about the individual user. For example, an Account Admin can access the CellGate portal and manage their account. A Vendor Code denotes someone who only enters the property at certain times using a code, like a lawn service.

The users page shows the users in your account, and allows you to manage those users.

### ACCOUNT USERS ?

Access Codes with an asterisk are stored on device.

1

2

3

4

5


6

Name	Properties/Locations	Access	Callgroups	Restrictions	Role
Amanda C <span style="color: red; font-weight: bold; font-size: 24px;">7</span>	All devices on this account				Account Admin


1. Select the options for the way in which you want to view the user. You can choose Name, Code/Credential, Phone Number, Property/Location, or Role.
2. In the Filter menu, w
3. Click  to filter the users with the terms.
4. Click  to clear your search results. You can then start your search again.
5. Click  to add a code only user.
6. Click  to add a new user.
7. Click on a user's name to select the user you want to edit.

## Create Users

1. Click **Users** icon from the navigation bar.
2. Click **+ Add User**.
3. Enter Name, Email, Phone Number, Timezone, and click **Next**.
4. Select User Type and User Role from dropdown; click **Next**.
5. Create user restrictions. See the [Restrictions](#) section for more information.
6. Enter information about how you want the user to access the system. You might choose to have the user enter a gate code, use an RFID/Card/Clicker, or a Web Smartphone login. Click **Next**.
7. Click **Next**.



DASHBOARD MANAGE CALLGROUP **USERS** LOGS MY ACCOUNT BILLING



Select Groups Filter: Search Clear Add Code Add User

Accessions	Access	Callgroups	Restrictions	Group
Armedas	Gas Code (2287)		Home Health Access	Home Health Access
Armedas	Gas Code (3027) RFID Tag (3542)	Home 5148	Home 5148	Callgroup Manager

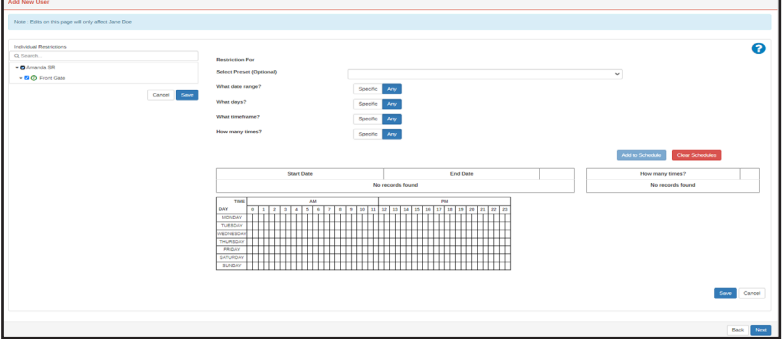
WHO DO YOU WANT TO ADD TO THE SYSTEM?

Name: Jane Doe  
Email: jsmith@gmail.com  
Phone Number: (972) 655-1442  
Timezone: (UTC-8) Central Standard Time

WHAT ROLE SHOULD JANE DOE HAVE?

User Types: Resident  
User Role: Video Callgroup User

User Role Description: Video Callgroup User - A Role that cannot access any portion of the Web Portal. This Role can access the CellGate app to send Monetary and Hold Open comments but cannot add codes or take pictures.



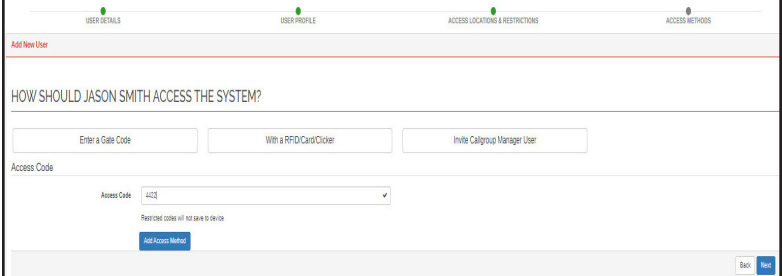
Add New User

Individual Restrictions: Accession, Accession Bill, Home Gate

Restrictions For: Select Person (Optional)

When does range? Specific Open  
When does? Specific Open  
When does/when? Specific Open  
How many times? Specific Open

User Date: No records found  
End Date: No records found  
How many times? No records found



USER DETAILS USER PROFILE ACCESS LOCATIONS & RESTRICTIONS ACCESS METHODS

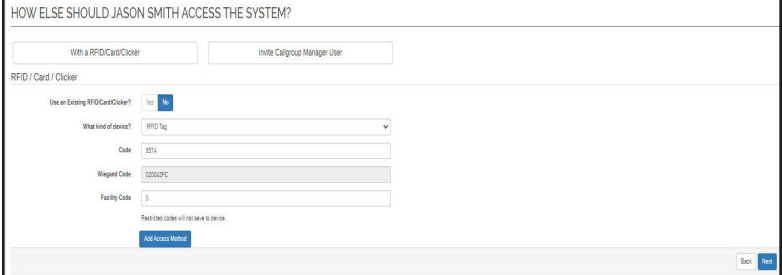
Add New User

HOW SHOULD JASON SMITH ACCESS THE SYSTEM?

Enter a Gate Code With a RFID/Clicker Invite Callgroup Manager User

Access Code: Access Code: 1423

Access Method: Add Access Method



HOW ELSE SHOULD JASON SMITH ACCESS THE SYSTEM?

With a RFID/Clicker Invite Callgroup Manager User

RFID / Card / Clicker

Use an Existing RFID/Clicker? Yes No

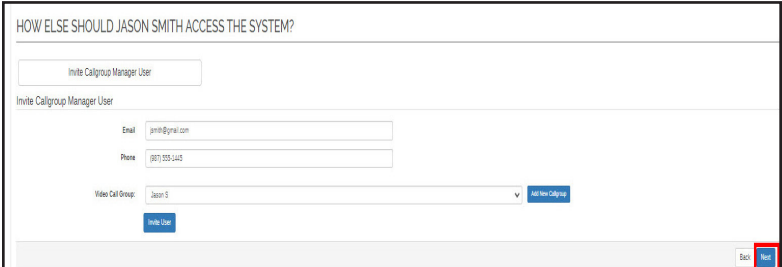
What kind of device? RFID Tag

Code: 874

Wiegand Code: 035A2FC

Facility Code: 0

Access Method: Add Access Method



HOW ELSE SHOULD JASON SMITH ACCESS THE SYSTEM?

Invite Callgroup Manager User

Invite Callgroup Manager User

Email: jsmith@gmail.com  
Phone: (972) 655-1442

Video Call Group: Jason S Add New Callgroup

Access Method: Invite User

# Restrictions

**1** Individual Restrictions

Search...

- Amanda SR
- Front Gate

Cancel Save

**2** Restriction For > Front Gate

Select Preset (Optional)

What date range?

Specific Any

From 01/03/2022 To 03/03/2023

What days?

Specific Any

Select Day Mon Tue Wed Thu Fri Sat Sun

What timeframe?

Specific Any

From 08:00 AM To 12:00 PM

How many times?

Specific Any

10

Add to Schedule Clear Schedules

	Start Date	End Date	How many times?
	1/3/2022 08:00 AM	3/3/2023 12:00 PM	10

DAY	AM											PM												
	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
MONDAY																								
TUESDAY																								
WEDNESDAY																								
THURSDAY																								
FRIDAY																								
SATURDAY																								
SUNDAY																								

Save Cancel

Back Next

The restrictions page has three parts.

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

## 1. Property, Location Access

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

Individual Restrictions

Search...

- Amanda SR
- Front Gate

Cancel **B** Save



## Edit a User

1. Click the **User** tab.



2. Click the user you want to edit.

ACCOUNT USERS

Access Codes with an asterisk are stored on device.

Name	Properties/Locations	Access	Callgroups	Restrictions	Group
Amanda C	All devices on this account		John Doe		Account Admin
Jane Doe	Front Gate	Gate Code [3248]		Winter Access	Guest Code

The Edit User screen has 3 sections:

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

### EDIT USER

#### 1 User Details

Name:

Email:  [Refresh](#)

[Reset Password](#)

Phone Number:

Timezone:

Actions: [9 Delete](#)

Web/Smartphone Login Expiration: Yes  No

Notes:

[Save](#)

#### 2 Access Methods

[View All Methods](#)

Type	Code
Addr:	<input type="text"/>

#### User Role

User Types:

User Role:  [Help ?](#)

**User Role/Description**

Account Admin - The Account owner. Has full Admin privileges in all areas of the portal and app. Role can also create codes from the CellGate app

[Apply](#)

#### 3 Restrictions

Note: Edits on this page will only affect Amanda C

Individual Restrictions

Q Search:

- Amanda SR
- Front Gate

[Cancel](#) [Save](#)

Restriction For

Select Preset (Optional):

What date range?  [Specific](#) [Any](#)

What days?  [Specific](#) [Any](#)

What timeframe?  [Specific](#) [Any](#)

How many times?  [Specific](#) [Any](#)

[Add to Schedule](#) [Clear Schedules](#)

Start Date:  End Date:

No records found

TIME	AM												PM											
DAY	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
MONDAY																								
TUESDAY																								
WEDNESDAY																								
THURSDAY																								
FRIDAY																								
SATURDAY																								
SUNDAY																								

[Save](#) [Cancel](#)



## 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](#)

The screenshot shows a user profile form with the following elements:

- A:** Name input field.
- B:** Email input field with an [Edit](#) button.
- C:** [Reset Password](#) button.
- D:** Phone Number input field with a format mask ( ) \_ - \_.
- E:** Timezone dropdown menu (currently set to UTC -5 Central Standard Time).
- Actions:** [Delete](#) button.
- F:** Smartphone Login Expiration toggle (Yes/No).
- G:** Notes input field.
- H:** [Save](#) button.

## 2. Access, User Group, User Role

- A. Migrate all methods
- B. Delete credential
- C. Edit user access
- D. Migrate to a user
- E. Add access method
- F. Change User Types
- G. Change User Role
- H. When you're done, click

[Apply](#)

The screenshot shows a configuration page with the following sections and elements:

- Access Methods:**
  - A:** [Migrate All Methods](#) button.
  - B:** Type dropdown (Gate Code).
  - C:** [Edit](#) button.
  - D:** [Migrate to a User](#) button.
  - E:** Add: dropdown menu.
- User Role:**
  - F:** User Types dropdown (Resident).
  - G:** User Role dropdown (Voice Callgroup Manager).
  - Help?** button.
  - Voice Call Group: Johnny (with [Add New Voice Call Group](#) button).
  - User Role/Description:**

Voice Callgroup Manager : A Role that can makes changes to their assigned Callgroup. Cannot access any other area of the Web Portal. This Role can access the CellGate app but cannot add codes or take pictures.
  - H:** [Apply](#) button.

## 3. Edit the Restrictions

Edit the user's restrictions and click [Save](#). For more information, see the [Restrictions](#) section.

## Logs

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

**LOGS**

**Log Filter**

Install Location

Code/Credential

Zap Open Number

Phone Number

Callgroup Name

Log Types  Images  Devices  Alarms  Device Actions  Access

Date From...  To...

04 : 37 PM

Timezone

Response  Successful  Failed  Pending

Filter By Schedule  Schedule

**Activity**

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

**LOGS**

**Log Filter**

Install Location **1**

Code/Credential **2**

Zap Open Number **3**

Phone Number **4**

Callgroup Name **5**

Log Types **6**  Images  Devices  Alarms  Device Actions  Access

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, and Access.

The screenshot shows the Log Filter interface with the following elements:

- 1**: Date selection fields labeled "From..." and "To..."
- 2**: Time selection fields for both "From" and "To" times, showing "04 : 37 PM".
- 3**: Timezone dropdown menu showing "(UTC -5) Central Standard Time".
- 4**: Response selection radio buttons for "Successful", "Failed", and "Pending".
- 5**: "Filter By Schedule" checkbox labeled "Schedule".
- 6**: "Filter" button (highlighted with a red box).
- 7**: "Export" button (highlighted with a red box).

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.

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

## My Account

To see your account information, click **My Account** on the Navigation Bar.

### MY ACCOUNT

Account Contacts <b>1</b>			<b>2</b> +Add	
Account	Amanda C		Delete	Edit
Billing	Amanda C		Delete	Edit

Property Contacts <b>3</b>				
Amanda Mt	Amanda C	Email: acoleman1@mail.com	Delete	Edit

#### Account Status



**Active** [Edit](#)

Account Number: 11911  
Timezone: Central Standard Time

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

## Billing

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

1. 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, and where invoices and receipts are sent.
3. Click .

## 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 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.