

Portal User's Guide for



SmartPackageRoom®



SmartPackageRoom
Lite™



PackageValet

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Getting Assistance

If you have any questions or comments, or need assistance from Technical Support, please contact Position Imaging, Inc. at their toll-free number: 1-888-909-2468

Or, Email: SPRSupport@position-imaging.com.

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About This Guide

This User's Guide uses the following to indicate useful and important information.

Note: Position Imaging will attempt to update information in this guide as much as possible, but please note, some screenshots might not reflect the current release.

Guide Conventions

The following typographical conventions are used throughout this guide:

- Keyboard entries are indicated in "quotes".
- Menu selections, menu items and entries in screen images are indicated as **bold**.
- References to other guides are *italicized*.
- References to internal [online links](#).

Note: Provides useful information about the current topic.

Caution: Provides information for the prevention of damage to the software.

WARNING! PROVIDES INFORMATION FOR THE PREVENTION OF PERSONAL INJURY OR DAMAGE TO THE HARDWARE.

Regulatory Requirements

Per IEC 60825-1 (Lasers)



LASER RADIATION
AVOID DIRECT EYE EXPOSURE
CLASS 2 LASER PRODUCT



This device complies with part 15 of the FCC Rules. Operation is subject to the following two conditions:

- 1) This device may not cause harmful interference, and
- 2) This device must accept any interference received, including interference that may cause undesired operation.

Note: This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instruction manual, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference in which case the user will be required to correct the interference at his own expense.

Getting Started

This User's Guide assists a Property Manager and Staff on how to use the Portal. It will show you how to:

- Register your account
- Manage Staff member accounts
- Create/deactivate a PIN for Staff
- Add Couriers
- Create/deactivate a PIN for a Courier
- Update a Recipient's information
- Re-issue a PIN
- Search for an item or recipient
- Create a custom note

Note: For information on how to deliver an item, pick up an item, or perform room maintenance, see the *Smart Package Room® User's Guide (90064)*, the *Smart Package Room Lite™ User's Guide (90147)* or the *Package Valet™ User's Guide (90228)*.

About the Portal

The Portal allows you to setup your User Account, create a PIN number or Key (QR) code to access the Kiosk, get history on Recipient items, invite Staff members, administer Couriers, and create a customized note. Your product may not use some of these features.

The Portal supports the Smart Package Room, Smart Package Room Lite, and Package Valet products. Some features in this guide may not be relevant to your product.

You can access the Portal via a laptop/desktop or on your phone.

Most of the options in the Portal are pre-defined and automatically set up for you. This guide details those options that you will need to access for setup and beyond.

Depending on your Authorization level (Staff or Manager), you may not have access to all options.

The Portal is located here: <https://app.smartpackageroom.com>.

Registering Your Account – Property Manager

To gain access and use your package room as a Property Manager or Staff member, you will need to register and set up your account in the Portal.

Invitation

An invitation from a Position Imaging Administrator will be sent to your Email's Inbox.

To set-up your account:

1. You would have received an Email from Position Imaging for an “Invitation from Smart Package Room,” click **View Invitation**, or cut and paste the URL link (in blue) into a web browser (recommended browsers: Google Chrome or Mozilla Firefox), see [Figure 1](#).

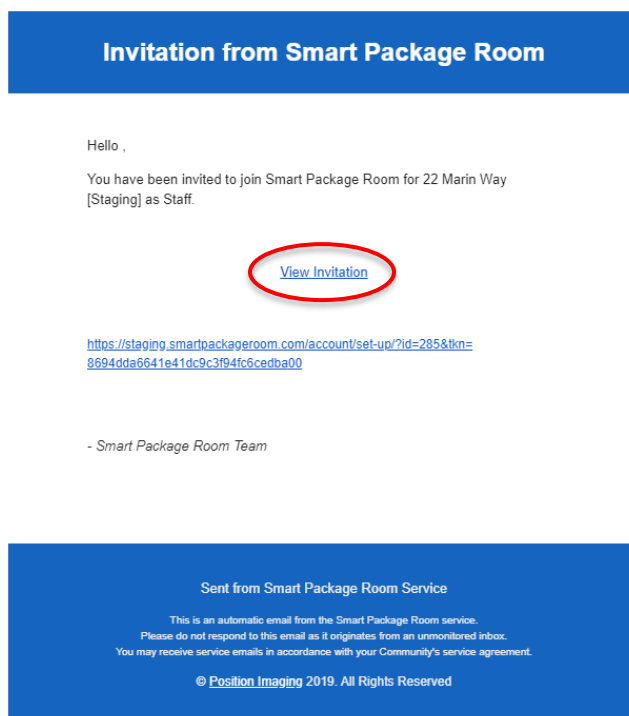


Figure 1: Sample Invitation Email

The Account Set-Up dialog opens, see [Figure 2](#).

2. If you do not have a Portal Account, you may create one at this time. Click **I do not have a Smart Package Room Account**.

If you do have an Account already, click “I already have a Smart Package Room Account” to bring you to the Sign-In page.

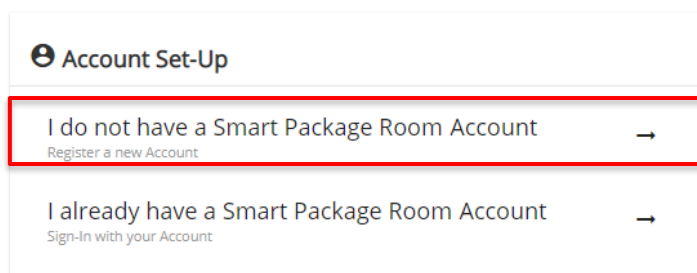
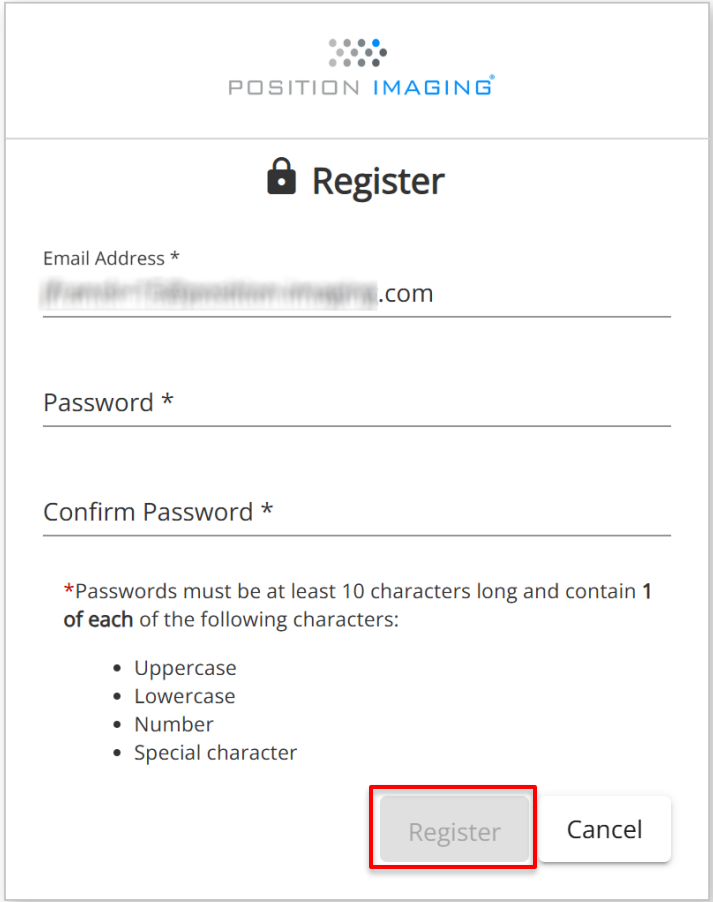


Figure 2: Package room account choices

Register Your Portal Account

To sign-in to the Portal, you must first create an account. If you clicked the “I do not have a Smart Package Room Account,” the Register new Account dialog opens, see [Figure 3](#).

A registration dialog box for Position Imaging. At the top is the logo with the text "POSITION IMAGING". Below it is a title "Register" with a padlock icon. There are three input fields: "Email Address *" with a placeholder "j.smith@position-imaging.com", "Password *", and "Confirm Password *". Below the fields is a note: "*Passwords must be at least 10 characters long and contain 1 of each of the following characters:" followed by a bulleted list: "Uppercase", "Lowercase", "Number", and "Special character". At the bottom right are two buttons: "Register" (highlighted with a red box) and "Cancel".

POSITION IMAGING

Register

Email Address *

j.smith@position-imaging.com

Password *

Confirm Password *

*Passwords must be at least 10 characters long and contain 1 of each of the following characters:

- Uppercase
- Lowercase
- Number
- Special character

Register Cancel

Figure 3: Register a new account

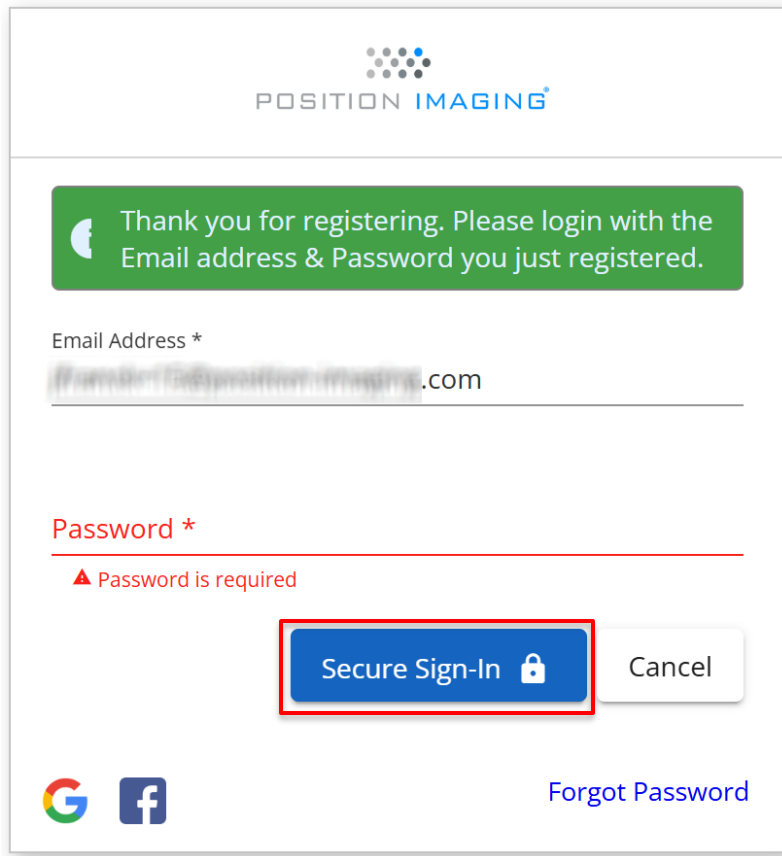
1. Enter your Email address and a password. Confirm the password. The password must contain an uppercase, lowercase, a number, a special character and be at least 10-characters long.
2. Click **Register**. See [Figure 3](#).

After you successfully register, you are brought to a Sign-in dialog and must sign-in to proceed.

Account Set-Up Sign-In

Once you register your Email and password, you need to sign-in and accept your registration.

1. Enter the Email and password that you used to register in the previous dialog, then click **Secure Sign-In**, see [Figure 4](#).

The image shows a web form for signing in to Position Imaging. At the top is the Position Imaging logo. Below it is a green message box that says "Thank you for registering. Please login with the Email address & Password you just registered." There are two input fields: "Email Address *" and "Password *". The email field contains the text "fremont@position-imaging.com". The password field is empty and has a red error message "▲ Password is required" below it. At the bottom of the form are two buttons: "Secure Sign-In" with a lock icon and a "Cancel" button. The "Secure Sign-In" button is highlighted with a red rectangle. In the bottom left corner are Google and Facebook social media icons. In the bottom right corner is a link that says "Forgot Password".

POSITION IMAGING®

Thank you for registering. Please login with the Email address & Password you just registered.

Email Address *

fremont@position-imaging.com

Password *

▲ Password is required

Secure Sign-In 

Cancel

[Forgot Password](#)

Figure 4: Account Sign-In

(Optional) Adding a Google Account Login to Sign-In

In the future, you can sign-in using your Google account.

1. Click the **My Account** icon in the top-right corner of the Portal, then click your name, see [Figure 5](#).

The My Account screen opens.

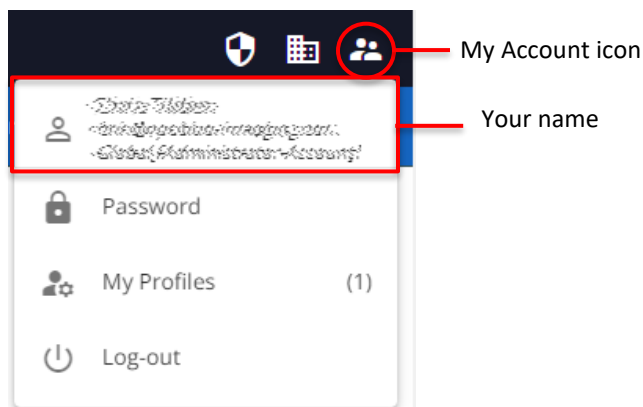


Figure 5: My Account menu selection

2. From the My Account page, scroll to the 3rd Party Logins section, see [Figure 6](#).

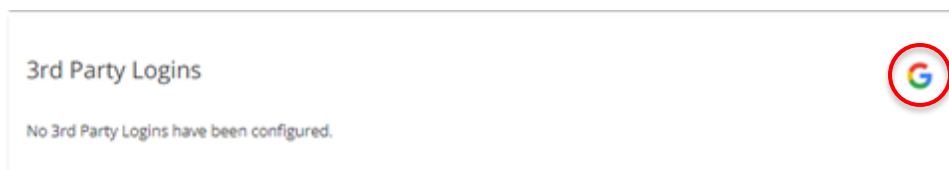


Figure 6: 3rd Party social media login

3. Click the Google social media icon, see [Figure 6](#).

The 3rd Party Permissions dialog opens, see [Figure 7](#).

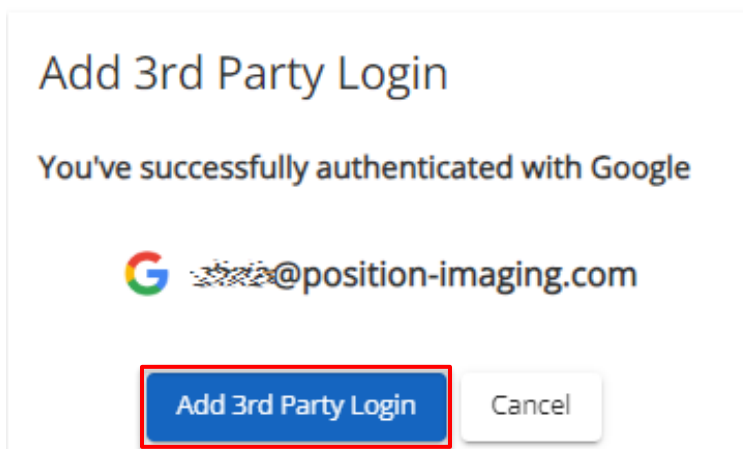


Figure 7: 3rd Party Permissions confirmation

4. Click **Add 3rd Party Login** to accept the Google login, see [Figure 7](#).

The system signs you in using your Google account and the next time you sign-in, you can click on the social media icon to sign-in.

Deleting a Social Media Login

If you need to delete (remove) Google login, follow these instructions.

1. Sign-in to the Portal.
2. In the Dashboard, click the **My Account** icon in the upper-right, then select **your name**.
3. Scroll to the bottom of the My Account page.
4. In the 3rd Party Logins section, click the **Remove Login** (trash can) button. See [Figure 8](#).



Figure 8: Remove 3rd party login

5. Click **Yes** to confirm your update.

Signing-In

Once registered (if you have not registered, see [Registering Your Account](#)), you are ready to sign-in to the Portal. Signing in to the Portal will require entering a user verification code sent via email. Instructions are provided on the next page.

You can open the Portal here: <https://app.smartpackageroom.com>.

1. A dialog opens, see [Figure 9](#), asking you to Sign-In. You have a few options:
 - a. You can enter your Email address and password, or
 - b. You can use your Google account login. Click the **Google** icon.

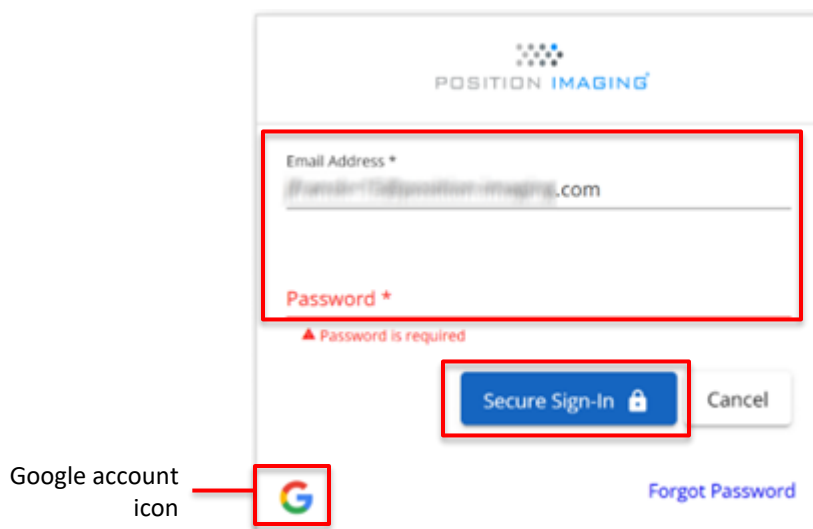


Figure 9: Sign-In

2. Click **Secure Sign-In**.

The Portal uses Multi-Factor Authentication (MFA) as a second layer of protection to your Portal account. A verification code will automatically be sent to the email address on file. See [Figure 10](#).

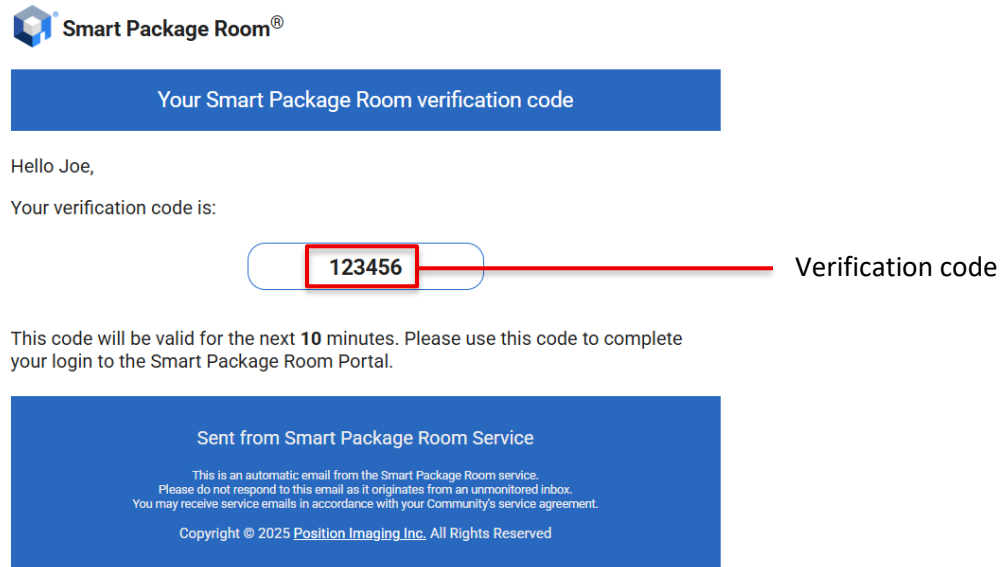


Figure 10: Verification code sent via email

3. Enter the verification code (type or cut n'paste) from the email into the Verification dialog, then click **Validate Code**. The code is valid for 10 minutes. Click **Resend Code** if you need the code resent. See [Figure 11](#).

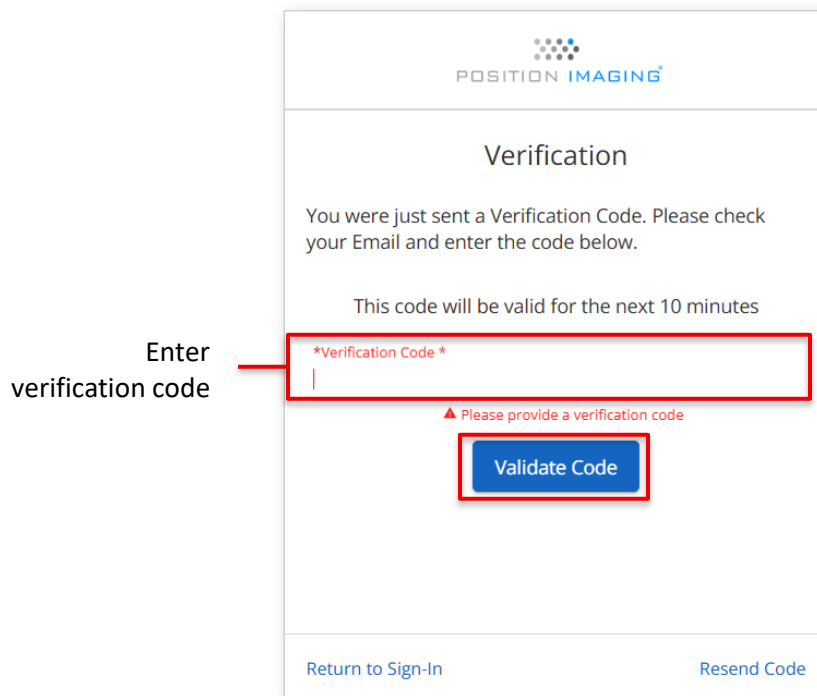


Figure 11: Enter the verification code

The Dashboard page opens ([Figure 12](#)).

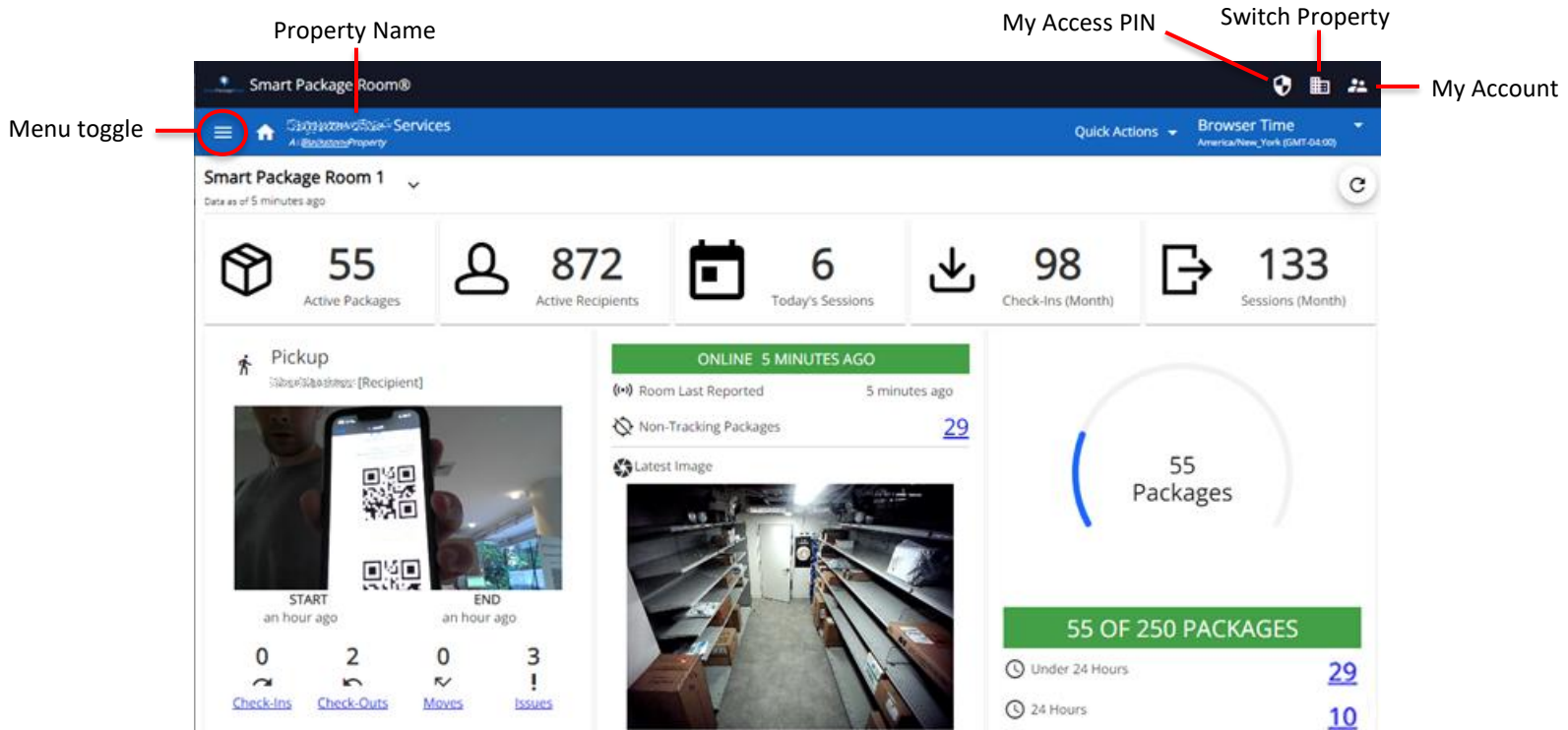


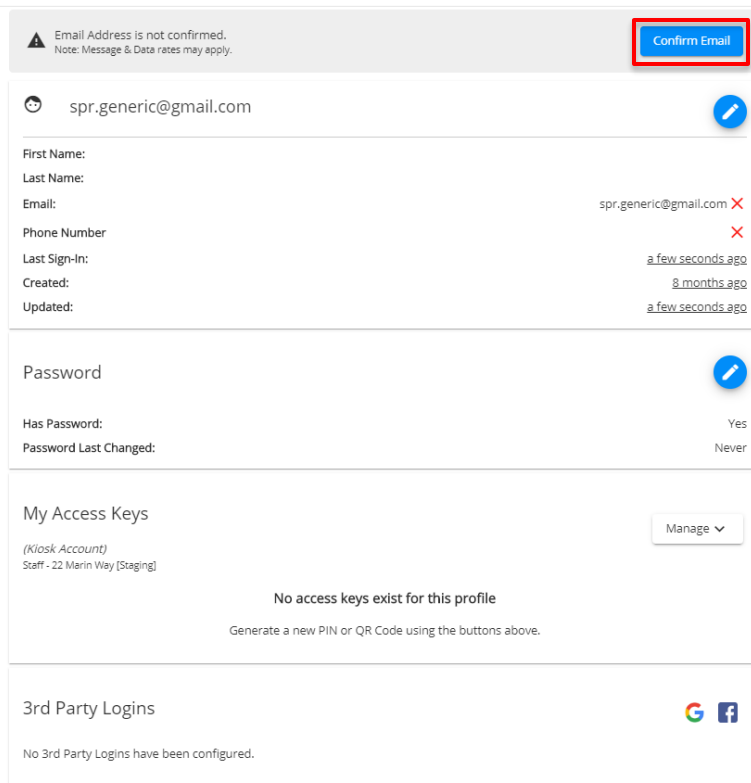
Figure 12: Dashboard

Confirming Your Email

You can confirm that there is communication between the Portal and your Email address.

To confirm your Email:

1. Sign-in to the Portal, as described in the previous section.
The Dashboard page opens. See [Figure 12](#).
2. Click the **My Account** icon in the upper-right, see [Figure 12](#), then select **your name**.
The My Account page opens, see [Figure 13](#).



⚠ Email Address is not confirmed.
Note: Message & Data rates may apply.

Confirm Email

spr.generic@gmail.com

First Name:
Last Name:
Email: spr.generic@gmail.com ✖
Phone Number: ✖
Last Sign-In: a few seconds ago
Created: 8 months ago
Updated: a few seconds ago

Password

Has Password: Yes
Password Last Changed: Never

My Access Keys

(Kiosk Account)
Staff - 22 Marin Way [Staging]

Manage

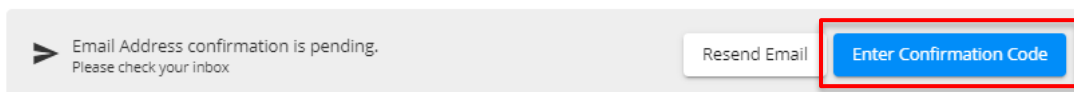
No access keys exist for this profile
Generate a new PIN or QR Code using the buttons above.

3rd Party Logins

No 3rd Party Logins have been configured.

Figure 13: Email confirmation

- Click **Confirm Email**. See [Figure 13](#).
An Email notification is sent to the signed-in Email address.
- From the Email, note the Confirmation Code.
- Click **Enter Confirmation Code** on the My Account page, see [Figure 14](#).



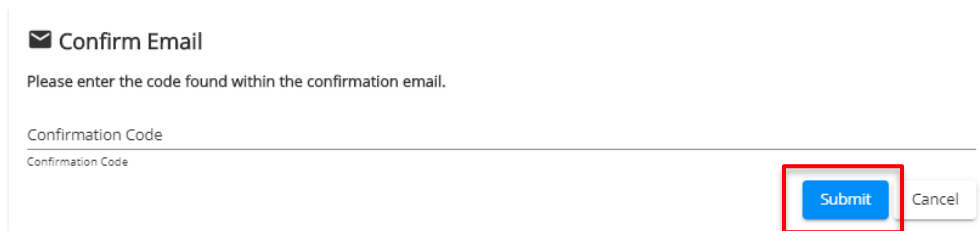
➤ Email Address confirmation is pending.
Please check your inbox

Resend Email

Enter Confirmation Code

Figure 14: Enter Confirmation Code

The Confirm Email dialog opens, see [Figure 15](#).



✉ Confirm Email

Please enter the code found within the confirmation email.

Confirmation Code

Confirmation Code

Submit Cancel

Figure 15: Confirm Email

- Enter the Confirmation Code you received in the Email, then click **Submit**. See [Figure 15](#).
You'll receive a message that the Email was successfully confirmed.

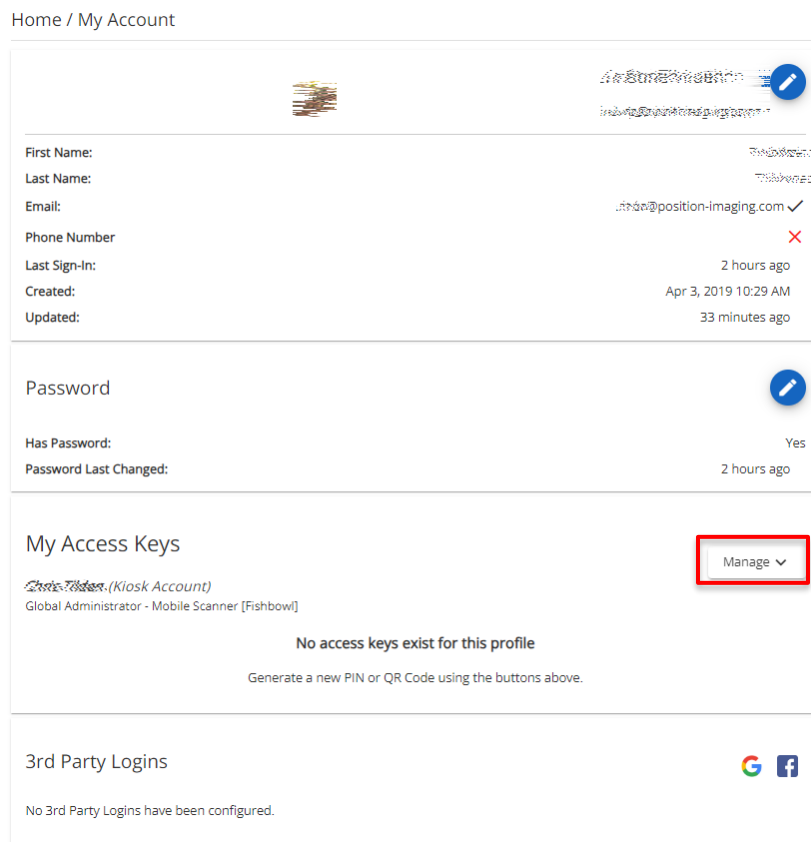
Creating a PIN (for the Property Manager)

To sign into the Kiosk, you will need to create a PIN.

To create a Property Manager PIN:

1. Sign-in to the Portal, as described in the previous section.
The Dashboard page opens. See [Figure 12](#) in the previous section.
2. Click the **My Account** icon in the upper-right, see [Figure 12](#), then select **your name**.
The My Account page opens, see [Figure 16](#).

Home / My Account



Home / My Account

First Name: [Redacted] Edit

Last Name: [Redacted] Edit

Email: [Redacted] ✓

Phone Number: [Redacted] ✗

Last Sign-In: 2 hours ago

Created: Apr 3, 2019 10:29 AM

Updated: 33 minutes ago

Password Edit

Has Password: Yes

Password Last Changed: 2 hours ago

My Access Keys Manage

Global Administrator - Mobile Scanner [Fishbowl]

No access keys exist for this profile

Generate a new PIN or QR Code using the buttons above.

3rd Party Logins

No 3rd Party Logins have been configured.

Figure 16: Home/My Account

3. Click **Manage** from the My Access Keys section, then select **Generate PIN** from the menu, see [Figure 17](#).

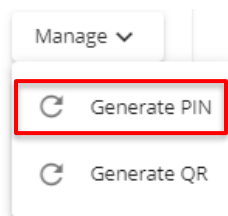


Figure 17: Generate PIN menu selection

The system generates a 6-digit PIN and displays the PIN number in the My Access Keys section of My Account, as shown in [Figure 18](#).

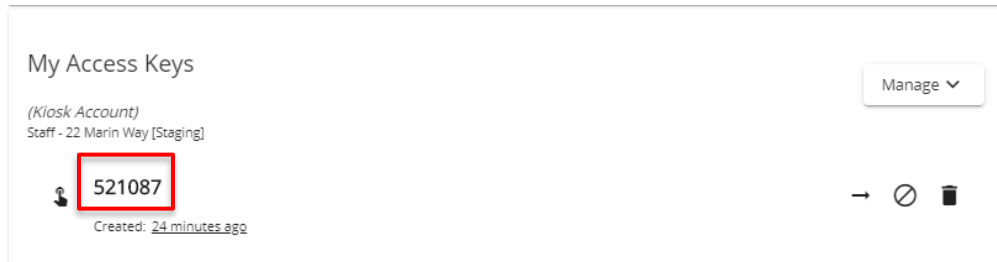


Figure 18: PIN activated, and number displayed

Note: After you have generated the PIN, you can also click the Shield in the upper-right corner of the Home page to display your PIN number.

Note: If you need a specific PIN (6 digits) number, contact Position Imaging Support with the PIN number you prefer, and they will be able to assist you.

4. Note the **PIN**. The PIN will be entered at the Kiosk to assign a Key Fob.

Deactivating a PIN

By deactivating a PIN, you are keeping the PIN so you can possibly reactivate it at a future time. When a PIN is deactivated, however, you cannot use it (until you reactivate it).

To deactivate a PIN:

1. Sign-in to the Portal.
The Dashboard page opens. See [Figure 12](#) in the previous section.
2. Click the **My Account** icon in the upper-right, see [Figure 12](#), then select **your name**.
The My Account page opens, see [Figure 16](#) in the previous section.
3. From the My Access Keys section, click the **Deactivate PIN** icon, see [Figure 19](#).

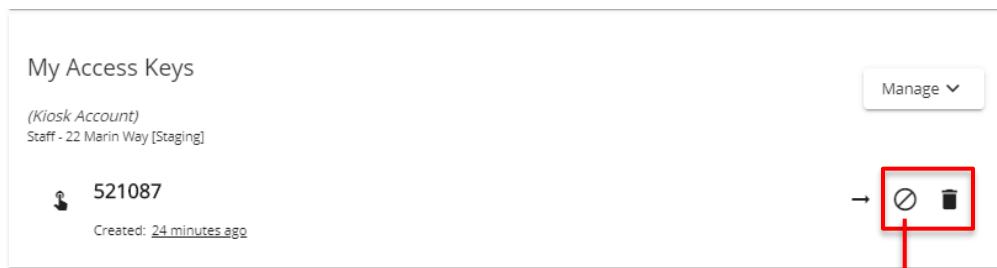


Figure 19: Deactivate PIN

Deactivate PIN

If you deactivate the PIN, the PIN will still display, and the Deactivate PIN icon changes to “Reactivate PIN.”

Managing Staff Accounts

Follow the procedure below to invite a Staff member and create a PIN for them to sign in at the Kiosk.

Inviting a Staff Member

To enable a Staff member to have access to the Portal and the package room, you can send them an Invite and have them create their account as described in the steps above. This section describes how to invite a Staff member.

To invite a Staff member:

1. From the Portal, click the **Menu** button on the left and choose **Invitations**. See [Figure 20](#).

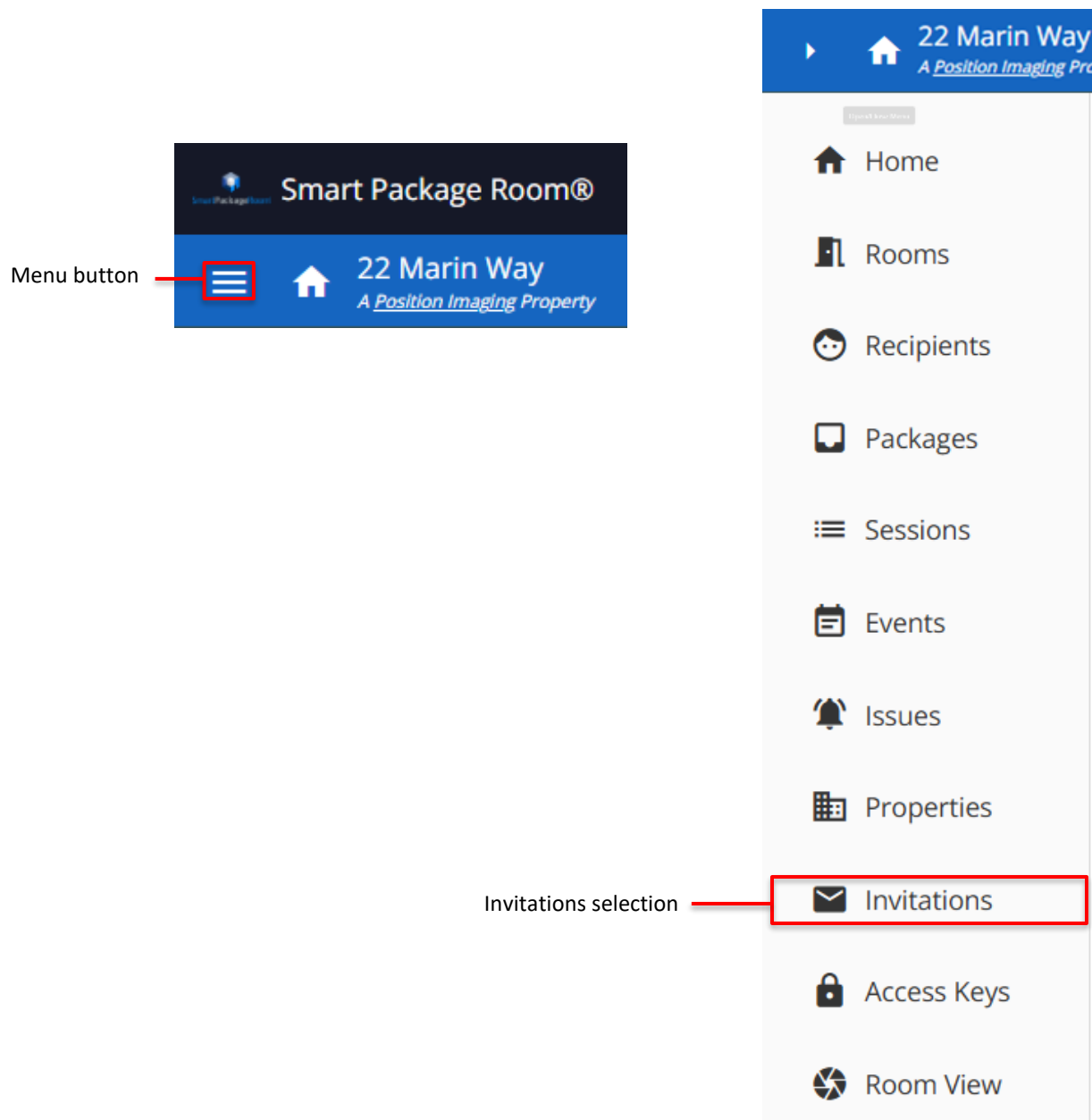
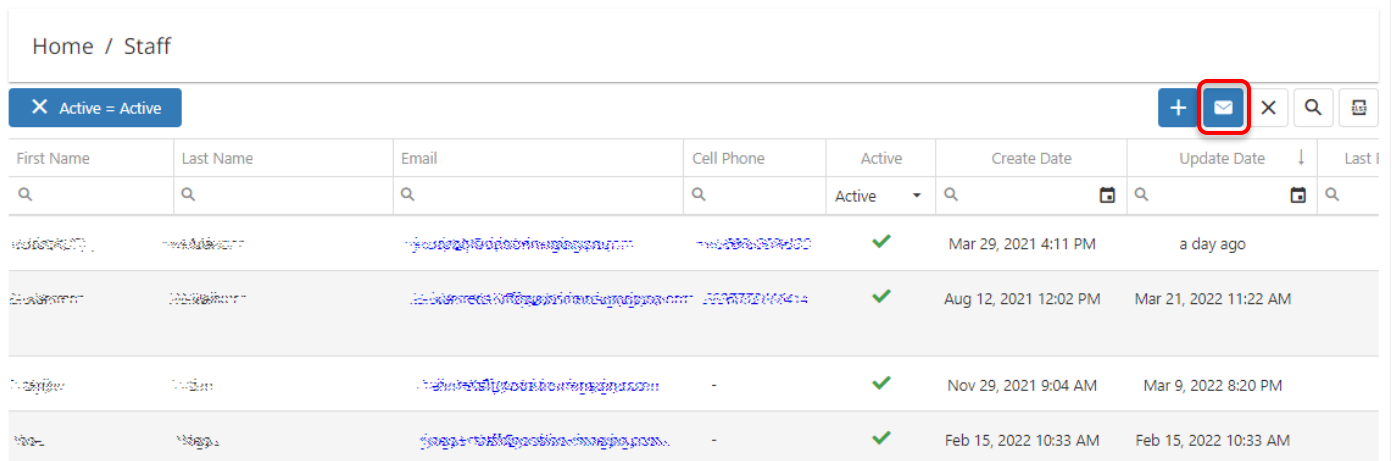


Figure 20: Menu button and options

The Staff page opens, see [Figure 21](#).

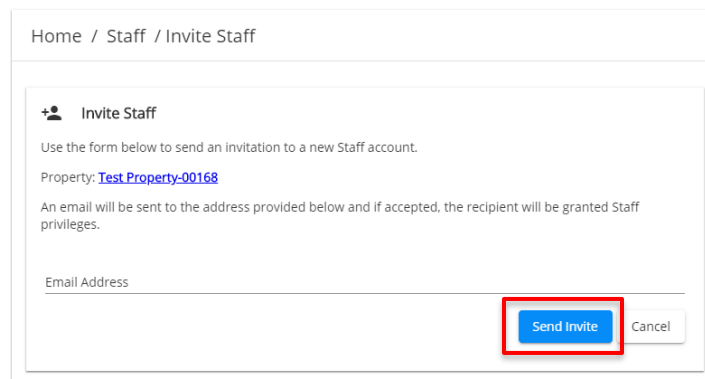


First Name	Last Name	Email	Cell Phone	Active	Create Date	Update Date	Last I
John	Adams	john.adams@company.com	714.555.1234	✓	Mar 29, 2021 4:11 PM	a day ago	
John	Adams	john.adams@company.com	714.555.1234	✓	Aug 12, 2021 12:02 PM	Mar 21, 2022 11:22 AM	
John	Adams	john.adams@company.com	-	✓	Nov 29, 2021 9:04 AM	Mar 9, 2022 8:20 PM	
John	Adams	john.adams@company.com	-	✓	Feb 15, 2022 10:33 AM	Feb 15, 2022 10:33 AM	

Figure 21: Staff page

2. Click the **Invite Staff** (envelope) button. See [Figure 21](#).

The Invite Staff dialog opens, see [Figure 22](#).



Home / Staff / Invite Staff

Invite Staff

Use the form below to send an invitation to a new Staff account.

Property: [Test Property-00168](#)

An email will be sent to the address provided below and if accepted, the recipient will be granted Staff privileges.

Email Address

Send Invite Cancel

Figure 22: Invite Staff dialog

3. Enter the **Email Address** of the Staff member you wish to add, then click **Send Invite**. See [Figure 22](#). Click **Yes** to confirm.

An Email is sent to the Staff member. Once they accept the invitation and create their account, they will be added to the Staff page and granted Staff privileges.

Inviting a Staff Member Using a Link

You can also send a staff member an invitation link (via email, text, chat) to Invite them to create their account as described in the steps above. This section describes how to invite a Staff member via a link.

1. From the Portal, click the **Menu** button on the left and choose **Invitation**.
2. Click the **Invitation Link** icon next to their name. See [Figure 23](#).

The Invitation Link dialog opens.

3. Click the **Copy Link** icon. See [Figure 23](#).

The link is copied to the Clipboard.

Copy Link icon

Invitation Link icon

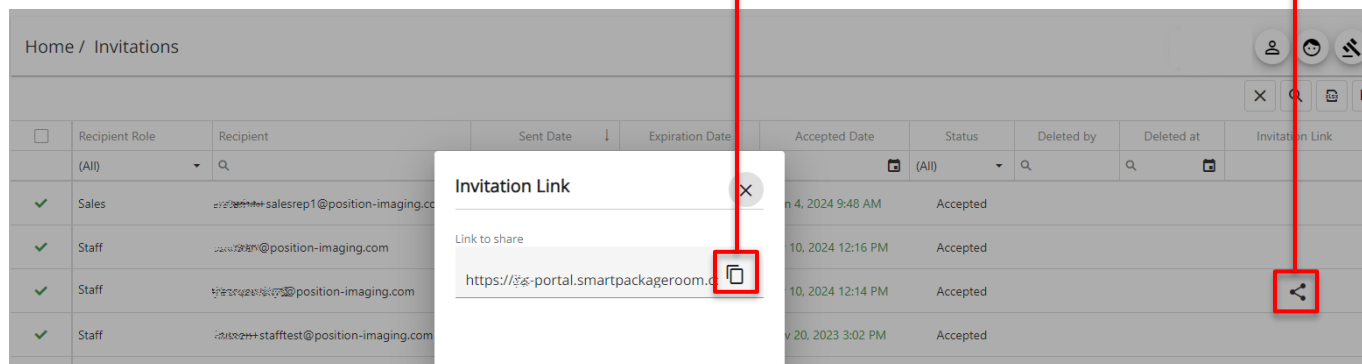


Figure 23: Invitation and Copy Link

4. Paste the link into any email, text or chat, and send it to the end user.

The end user can use this link to create a Staff account in the Portal.

Creating a PIN or QR Code for Staff

If Staff is having trouble creating a PIN for themselves, the Property Manager can create one using the following procedure.

To create a Staff PIN:

1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Staff**.

The Staff page opens, see [Figure 24](#).

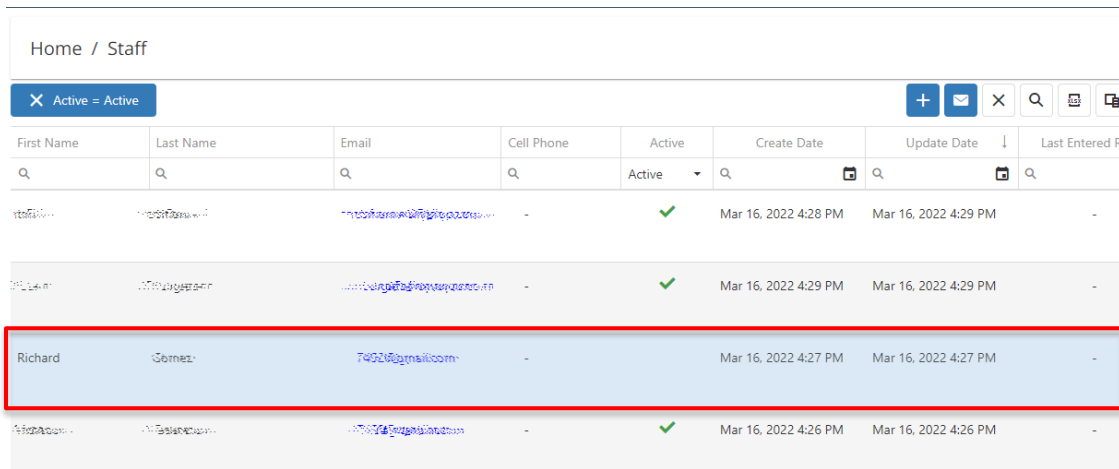


Figure 24: Select a Staff

2. Click the Staff member you want to create a PIN for. As you mouse over the name, it highlights blue. See [Figure 24](#).

The Staff Detail page opens. See [Figure 25](#).

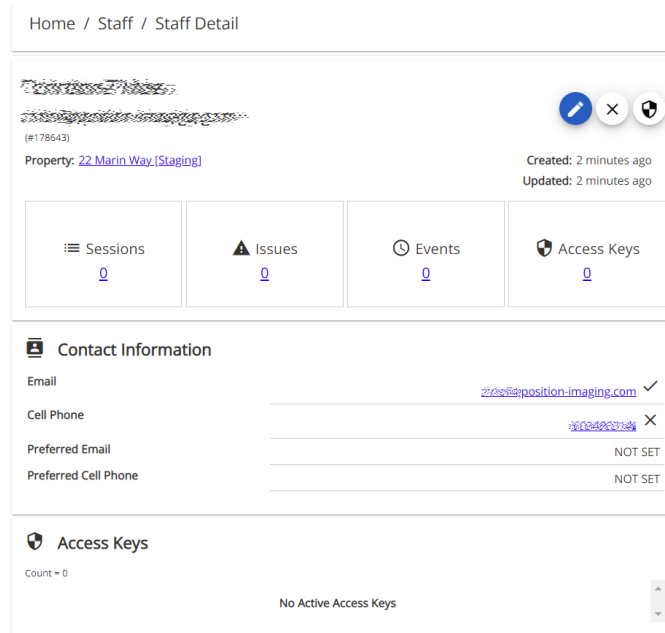


Figure 25: Staff Detail page

3. Click the **Access Key Maintenance** (shield) button on the Staff Detail page and select **Generate PIN** from the menu, see [Figure 26](#).

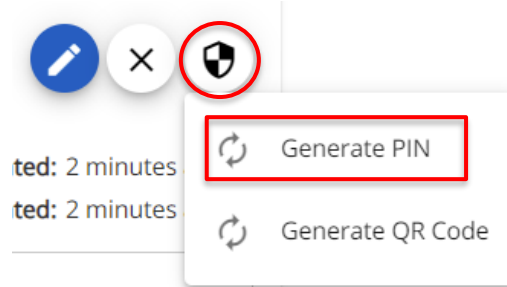


Figure 26: Generate PIN menu selection

The system generates a 6-digit PIN and displays a checkmark and the PIN number in the Access Keys section of the Staff Detail page, as shown in [Figure 27](#). If an “x” appears in place of a checkmark, this indicates that the PIN is inactive.



Figure 27: PIN activated, and number displayed

4. Note the **PIN**, because you will need this to access the package room.

The PIN is used to sign-in to the Kiosk, you will also need the PIN to assign a Key Fob. See the *Smart Package Room User's Guide* or the *Smart Package Room Lite User's Guide* for information on how to assign a Key Fob.

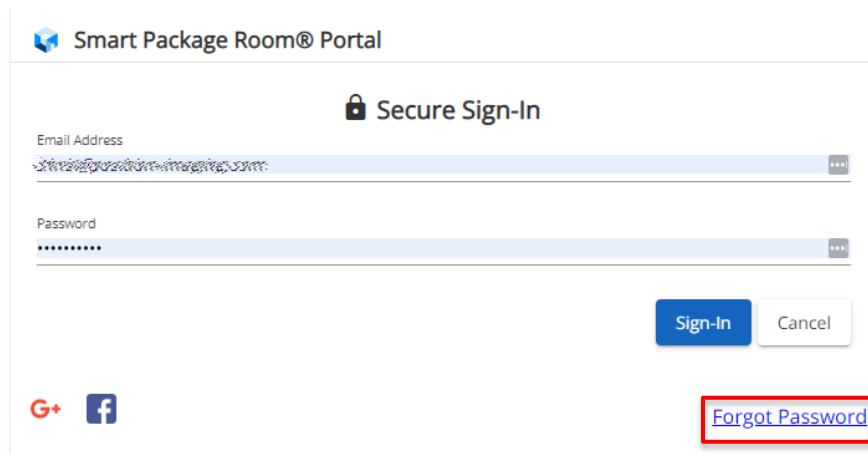
5. To create a QR Code for a Staff member, follow the same steps above, but choose “Generate QR Code.”

Forgot a Password

If a Staff member forgets their password to log into the Portal, they can reset their password to receive a new one.

To reset a Staff's password:

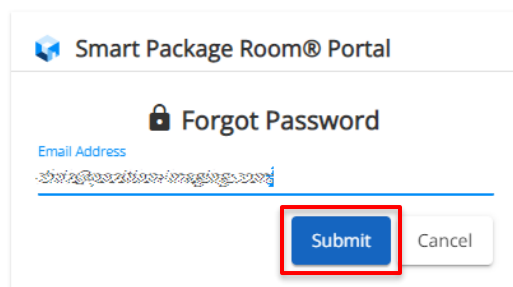
1. In the Portal, click the "Forgot Password" link on the Sign-in screen. See [Figure 28](#).



The image shows the 'Smart Package Room® Portal' 'Secure Sign-In' page. It features input fields for 'Email Address' and 'Password'. Below the password field are 'Sign-In' and 'Cancel' buttons. At the bottom right, a 'Forgot Password' link is highlighted with a red rectangle. Social media icons for Google+ and Facebook are visible at the bottom left.

Figure 28: Forgot Password link

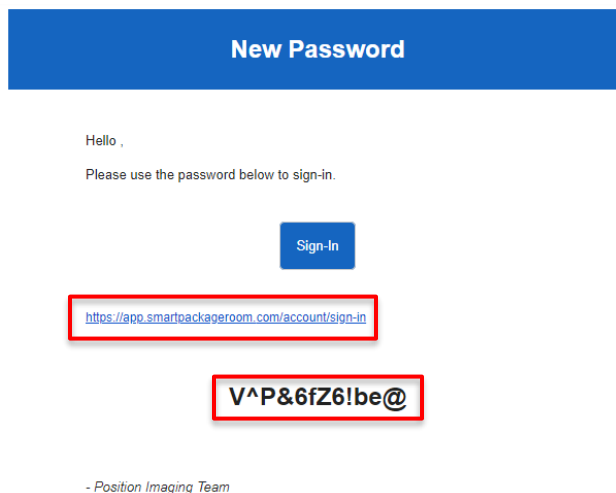
2. In the Forgot Password dialog, enter your email address into the field, then click **Submit**. See [Figure 29](#).



The image shows the 'Smart Package Room® Portal' 'Forgot Password' dialog. It has an 'Email Address' input field with a blue border. Below the field are 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a red rectangle.

Figure 29: Enter your email address

You will be sent a link and a temporary password to your email. See [Figure 30](#).



The image shows an email template for password reset. It has a blue header bar with the text 'New Password'. Below the header, it says 'Hello ,' and 'Please use the password below to sign-in.' There is a 'Sign-In' button. Below the button, a URL 'https://apo.smartpackageroom.com/account/sign-in' is highlighted with a red rectangle. Below the URL, a temporary password 'V^P&6fZ6!be@' is highlighted with a red rectangle. At the bottom, it says '- Position Imaging Team'.

Figure 30: Email link and temporary password

3. Copy the temporary password.
4. Click the link in the email.
5. This brings you back to the Portal, your Email Address should display. Paste the temporary password into the Password field. Click **Sign-In**.

The Mandatory Password Change dialog opens, see [Figure 31](#).

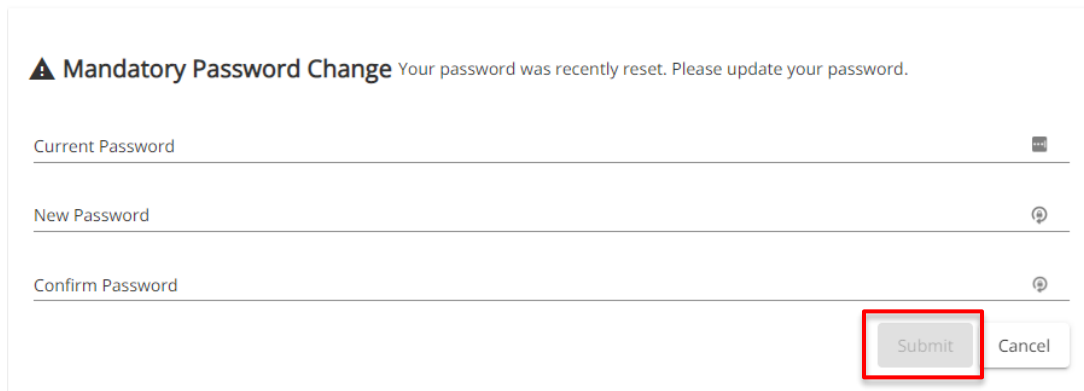
The image shows a web dialog box titled "Mandatory Password Change" with a warning triangle icon. Below the title is a message: "Your password was recently reset. Please update your password." There are three input fields: "Current Password", "New Password", and "Confirm Password". Each field has a small icon on the right side (a square for current password, and a circle with a question mark for new and confirm passwords). At the bottom right, there are two buttons: "Submit" and "Cancel". The "Submit" button is highlighted with a red rectangular border.

Figure 31: Mandatory Password Change dialog

6. Paste the temporary password into the Current Password field.
7. Enter a new password and confirm the password again. The password must contain an uppercase, lowercase, a number, a special character and be at least 10-characters long.
8. Click **Submit**. See [Figure 31](#).

You should see a message, "Password Successfully Changed".

Changing a Password

If you need to change your account password, follow these instructions.

1. Sign-in to the Portal.
2. In the Dashboard, click the **My Account** icon in the upper-right, then select **Password**. See [Figure 32](#).

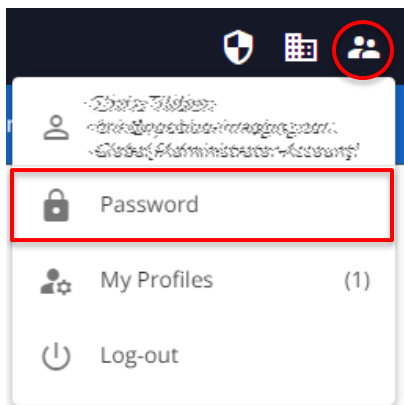


Figure 32: My Account icon and password option

3. In the Password page, enter your current password. See [Figure 33](#).

A screenshot of the 'Change Password' form. It contains three input fields: '*Current Password *', '*New Password *', and '*Confirm Password *'. Below these fields is a text box with password requirements: '*Passwords must be at least 10 characters long and contain 1 of each of the following characters:'. The requirements listed are: Uppercase, Lowercase, Number, and Special character. At the bottom right, there is a blue 'Update Password' button and a grey 'Cancel' button. The 'Update Password' button is highlighted with a red rectangular box.

Figure 33: Change password

4. Enter your new password, then confirm your new password.
5. Click the **Update Password** button. See [Figure 33](#).

Updating Your Account – Email or Phone

If you need to update any information in an account (Email, cell phone), follow these instructions.

1. Sign-in to the Portal.
2. In the Dashboard, click the **My Account** icon in the upper-right. Then click **My Profiles**. See [Figure 34](#).

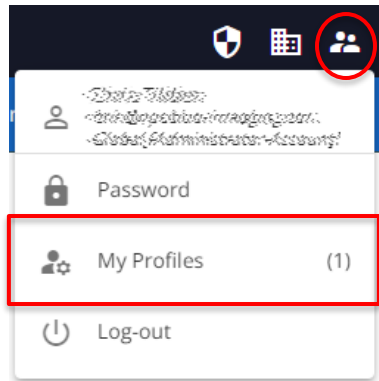


Figure 34: My Account icon and My Profiles menu option

3. In the My Profiles page, click **View Profile** (arrow) button. See [Figure 35](#).

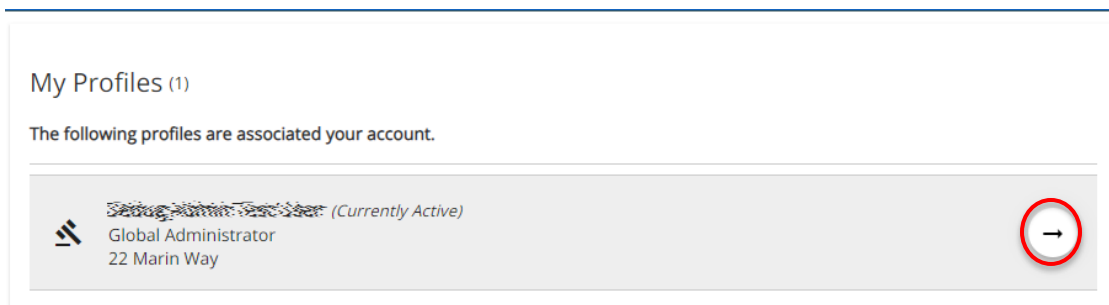


Figure 35: View Profiles

The Administrator Detail page opens.

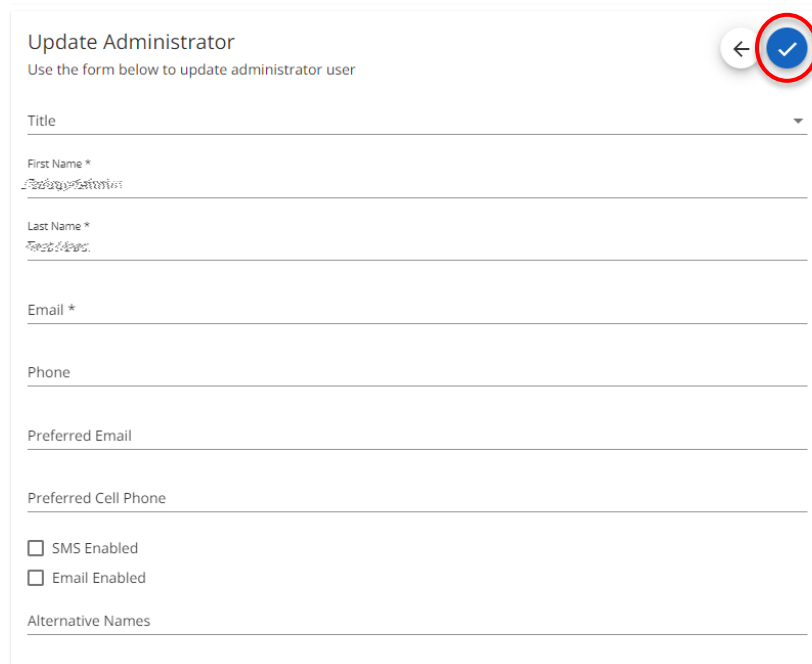
4. Click **Edit Administrator** (pencil) button. See [Figure 36](#).



Figure 36: Edit Administrator (pencil) button

The Update Administrator page opens.

5. Make the appropriate changes, then click **Update Administrator** (checkmark) button. See [Figure 37](#).



Update Administrator

Use the form below to update administrator user

Title

First Name *

Last Name *

Email *

Phone

Preferred Email

Preferred Cell Phone

☐ SMS Enabled

☐ Email Enabled

Alternative Names

Figure 37: Update my account

Customizing a PIN for Staff

If you want to assign a specific 6-digit number to a Staff's PIN, you can edit their existing PIN. The system will confirm that it is not a duplicate. You will need the Staff's 6-digit PIN that you are changing.

The steps are the same for customizing a Courier's PIN, see [Customizing a PIN for a Courier or Staff](#) on page [31](#).

Deactivating a PIN or QR Code for Staff

If you need to deactivate a Staff's PIN or QR Code, but not deactivate their account, follow these procedures.

1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Staff**.

The Staff page opens, see [Figure 24](#), in the previous section.

2. Click the **Staff member** you want to delete the PIN for.

The Staff Detail page opens. See [Figure 25](#), in the previous section.

3. Click the **Shield** icon and select **Deactivate PIN** from the pulldown menu. See [Figure 38](#).

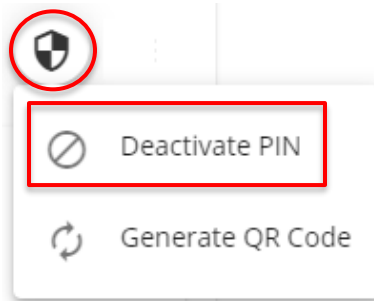


Figure 38: Deactivate PIN

The PIN deactivates.

4. To deactivate the QR Code, follow the same steps above, but choose "Deactivate QR Code."

Deactivating a Staff Account

1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Staff**.
The Staff page opens, see [Figure 24](#), in the previous section.
2. Click the Staff member you want to deactivate. See [Figure 24](#).
The Staff Detail page opens. See [Figure 25](#), in the previous section.
3. Click the **Deactivate Staff** (x) button on the Staff Detail page, see [Figure 39](#).



Figure 39: Deactivate Staff Account button

4. In the Deactivate Account dialog, click **Yes**. See [Figure 40](#).

Deactivate Account

Are you sure you want to deactivate this Account?



Figure 40: Confirmation to deactivate Staff account

The Staff member is deactivated including their Access Keys (PIN and QR Code). A “Staff Is Not Active” message displays at the top of the Staff Detail page. See [Figure 41](#).

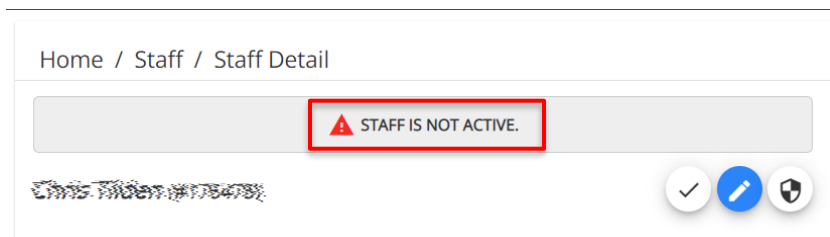


Figure 41: Staff member is not active message

Managing Courier Accounts

To deliver items to a package room, you need to add the courier to the Portal so they have access to the package room.

After adding a Courier, you can assign a Key Card to scan which will allow them access into the package room. The best approach is to make a generic Courier account for each carrier (USPS, UPS, DHL, FedEx, etc.), generate a PIN, then use the PIN to assign a Key Card. You probably will only need one Key Card per carrier, but, if necessary, you can make additional PINs/Key Cards for specific Couriers anytime. Leaving the Key Card with onsite Staff will assure that the Courier always has access to the package room.

Adding a Courier

To add a new Courier:

- 1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Couriers**.

The Couriers page opens, see [Figure 42](#).

Home / Couriers

Add Courier button

Active = Active

+

×

🔍

📄

📄

First Name	Last Name	Carrier	Custom Carrier Name	Carrier Service	Active
🔍	🔍	(All) ▾	🔍	🔍	Active ▾
Lasership	Couirer	Other	-	Any	✓
Generic	Courier	Other	-	Any	✓
Amazon	Courier	Amazon	-	Any	✓
USPS	Courier	USPS	-	Any	✓

Figure 42: Couriers page

2. Click the **Add Courier (+)** button. See [Figure 42](#).

The Create Courier page opens, see [Figure 43](#).

Figure 43: Create Courier

3. Fill in the appropriate information:
 - a. From the Carrier menu, select a carrier, or select Custom to add a custom carrier that is not listed in the menu.
 - b. From the Service menu, select: Any, Ground, Express, Expedited, or Overnight.
 - c. Enter the First Name and Last Name of the Courier or enter something like UPS (as the first name) and Courier (as the last name).
4. Click the **Create Courier** (checkmark) button.

The new Courier is added to the list of Couriers.

Creating a PIN or QR Code for a Courier

For a Courier to access the Kiosk to deliver items, they will need a PIN.

To create a Courier PIN:

1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Couriers**.

The Couriers page opens, see [Figure 44](#).

Home / Couriers							
First Name	Last Name	Carrier	Custom Carrier Name	Carrier Service	Active	Create Date	Upc
		(All)			Active		
	Courier	UPS	-	Any	✓	Dec 8, 2021 2:05 PM	Jun 8, 20
Ray	Smith	FedEx	-	Ground	✓	Apr 22, 2022 11:10 AM	Apr 22, 20
		DHL	-	Expedited	✓	Feb 4, 2022 3:31 PM	Feb 16, 21
	O'Toole	FedEx	-	Express	✓	Dec 10, 2021 10:49 AM	Dec 16, 21

Figure 44: Select a Courier

2. Click the Courier you want to create a PIN for. As you mouse over the name, it highlights blue. See [Figure 44](#).

The Courier Detail page opens. See [Figure 45](#).

Home / Couriers / Courier Detail

Ray Smith
(#178644)
Property: [22 Marin Way \[Staging\]](#)
Carrier: FedEx
Carrier Service: Ground

Created: 4 minutes ago
Updated: 4 minutes ago

Sessions
[0](#)

Issues
[0](#)

Events
[0](#)

Access Keys
[0](#)

Contact Information

Email

NOT SET

Cell Phone

NOT SET

Preferred Email

NOT SET

Preferred Cell Phone

NOT SET

Access Keys

Count = 0

No Active Access Keys

Figure 45: Courier Detail

3. Click the **Access Key Maintenance** (shield) button on the Courier Detail page and select **Generate PIN** from the menu, see [Figure 46](#).

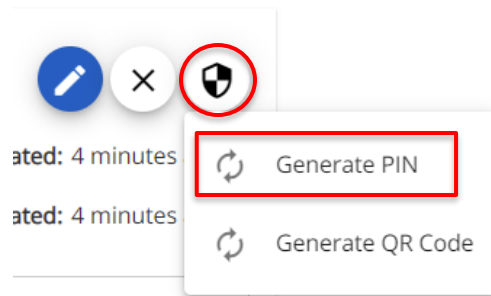


Figure 46: Generate PIN menu selection

The system generates a 6-digit PIN and displays a checkmark and the PIN number in the Access Keys section of the Courier Detail page, as shown in [Figure 47](#). If an “x” appears in place of a checkmark, this indicates that the PIN is inactive.



Figure 47: PIN activated, and number displayed

4. Note the **PIN**, because you will need it to assign a Key Card (for a Courier) using the PIN.
The PIN is used to sign-in to the Kiosk, you will also need the PIN to assign a Key Card. See the *Smart Package Room User's Guide* or the *Smart Package Room Lite User's Guide* for information on how to assign a Key Card.
5. To create a QR Code for a Courier, follow the same steps above, but choose “Generate QR Code.”

Customizing a PIN for a Courier or Staff

If you want to assign a specific 6-digit number to a Courier's or Staffs PIN, you can edit their existing PIN. The system will confirm that it is not a duplicate. You will need the Courier's or Staffs 6-digit PIN that you are changing.

Note: This feature is only accessible to a Manager or Administrator in the Portal.

To customize a PIN:

1. From the Portal, click the **Menu** button on the left and choose **Access Keys**.
The Access Keys page opens.
2. Click the Courier (or Staff) you want to customize the PIN for.

3. Click the **Edit Access Key** (pencil) button. See [Figure 48](#).

Home / Access Keys / Detail

Details User Packages Sessions

PIN
Temporary access key that can be entered or scanned on the kiosk.

PIN IS ACTIVE

Type:	PIN ?
Status:	Active
Priority:	Medium
Created:	Jan 6, 2023 2:34 PM
Updated:	Jan 6, 2023 2:34 PM
Expiration:	-
Deactivation:	-
Property:	22 Marin Way

Assigned To

Figure 48: Access Keys page

4. Click in the **New Value** field and **enter** the new customized 6-digit PIN. Click **Save**. See [Figure 49](#).

Home / Access Keys / Edit

Edit Key Value

Current Value: 433666

New Value *
New Value:
123123

Cancel Save

Figure 49: Current Value and New Value PIN

The system confirms that the PIN is not a duplicate and generates a new customized 6-digit PIN and displays a checkmark and the PIN number in the Access Keys section of the Courier or Staff Detail page, as shown in [Figure 50](#). If an “x” appears in place of a checkmark, this indicates that the PIN is inactive.

Access Keys

Count = 1

	PIN ✓ 123123 Behavior Type: Persisting
--	--

Figure 50: PIN activated, and number displayed

Deactivating a PIN for a Courier

If you need to remove or deactivate a Courier's PIN, follow this procedure.

1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Couriers**.
The Couriers page opens, see [Figure 44](#), in the previous section.
2. Click the Courier you want to create a PIN for. See [Figure 44](#).
The Courier Detail page opens. See [Figure 45](#), in the previous section.
3. Click the **Shield** icon and select **Deactivate PIN** from the pulldown menu. See [Figure 51](#).

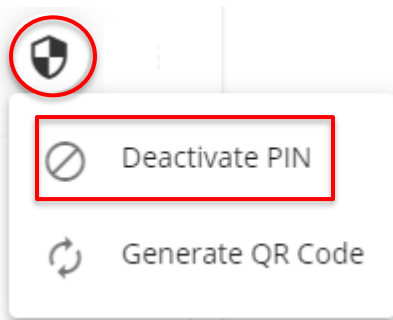


Figure 51: Deactivate PIN

The PIN deactivates.

4. To deactivate the QR Code, follow the same steps above, but choose "Deactivate QR Code."

Deactivating a Courier Account

1. From the Portal, click the **Menu** button on the left and choose **User Admin**, then **Couriers**.

The Courier page opens, see [Figure 44](#), in the previous section.

2. Click the Courier you want to deactivate. See [Figure 44](#).

The Courier Detail page opens. See [Figure 45](#), in the previous section.

3. Click the **Deactivate** (x) button on the Courier Detail page, see [Figure 52](#).



Figure 52: Deactivate Courier Account button

The Courier is deactivated including their Access Keys (PIN and QR Code). A “Courier Is Not Active” message displays at the top of the Courier Detail page. See [Figure 53](#).

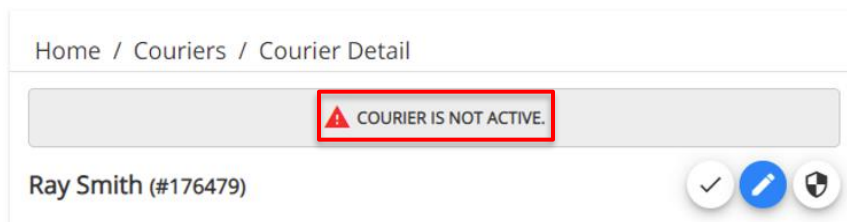


Figure 53: Courier is not active message

Managing Recipients Accounts

Your Residential Data Management program (Yardi, OneSite (Realpage), Entrata, Salesforce, etc.) imports Recipient's (resident's) data into the Portal system daily. It is strongly recommended that you let your Residential Data Management program update your Recipients. However, you may need to add roommates or children to a Recipient's account, or you may need to manually update an existing Recipient associated with your complex/company that will be using the package room. In addition, there are options that may be helpful to turn on and off, including ADA Required, Opt-Out, and Address Verification.

Updating an Existing Recipient

In the Portal, the Recipients Detail page displays information about a current Recipient. You can edit, delete, and block a Recipient in the Recipients Detail page.

To update a Recipient:

- From the Portal, click the **Menu** button on the left and choose **Recipients**.
The Recipients page opens.
- To search for a recipient, you can enter various information: first name, last name, email, etc. Mouse over the search icon under the column you want to search on and select a criterion from the menu. See [Figure 54](#).
- Or just enter the information (last name, first name, email, etc.) into the Search box.
As you type, the system starts populating with matching criteria.

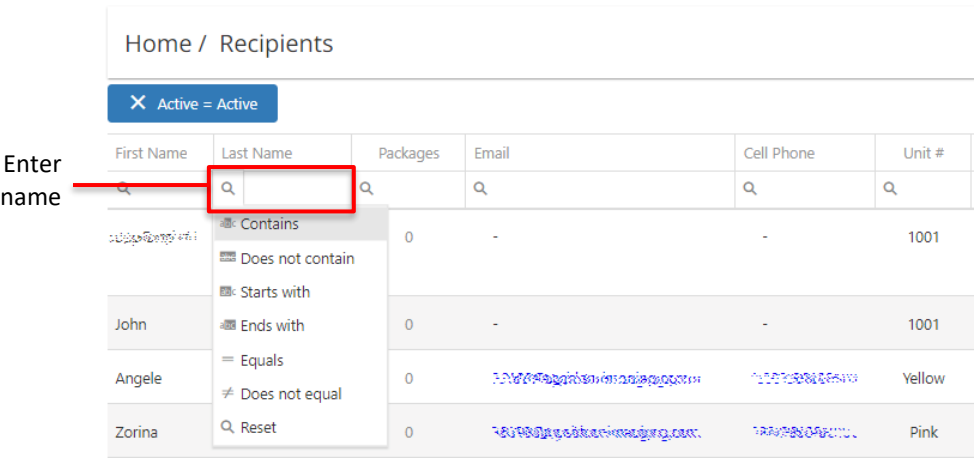
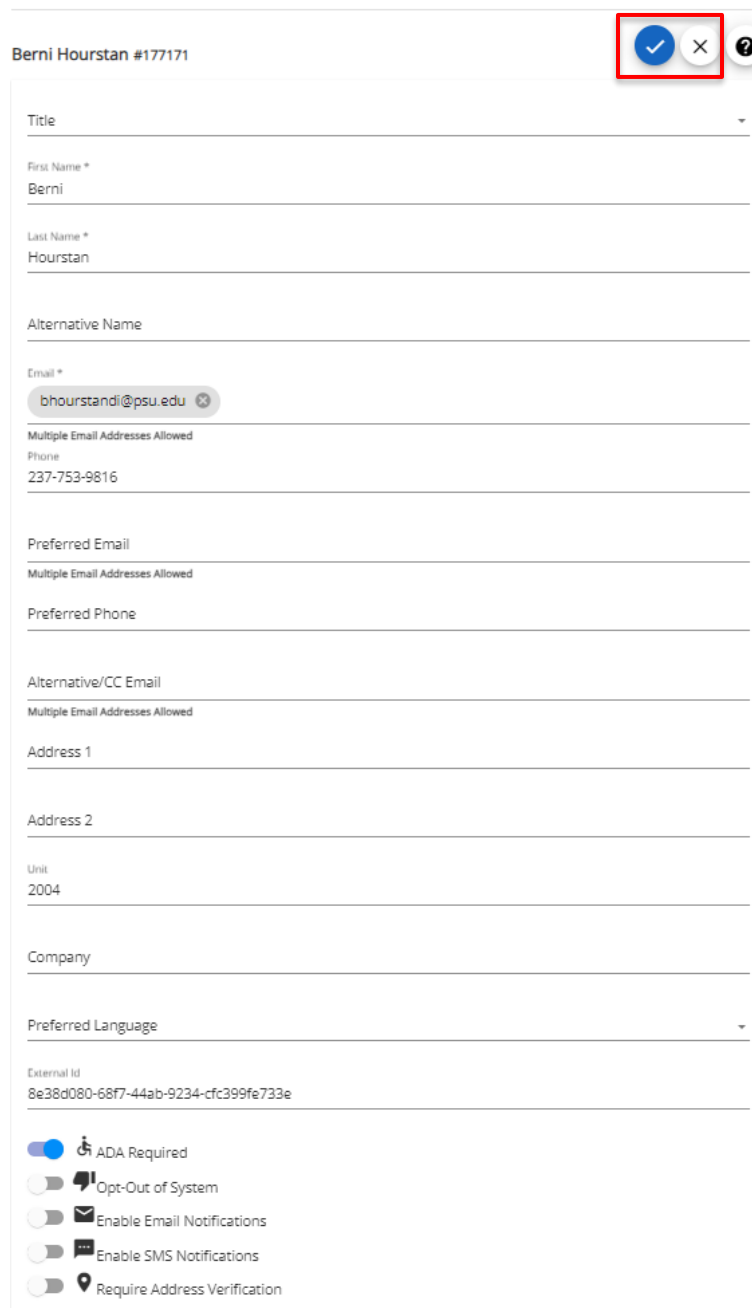


Figure 54: Search for a Recipient

- Click the Recipient you want to update (as you mouse over the name, the area turns blue).
The Recipient Detail page opens displaying information about that Recipient.
- To edit information about the Recipient, click the **Edit Recipient** (pencil)  button.

The Update Recipient page opens. See [Figure 55](#).



Berni Hourstan #177171

Title

First Name *

Berni

Last Name *

Hourstan

Alternative Name

Email *

bhourstandi@psu.edu

Multiple Email Addresses Allowed

Phone

237-753-9816

Preferred Email

Multiple Email Addresses Allowed

Preferred Phone

Alternative/CC Email

Multiple Email Addresses Allowed

Address 1

Address 2

Unit

2004

Company

Preferred Language

External Id

8e38d080-68f7-44ab-9234-cfc399fe733e

☒ ADA Required

☐ Opt-Out of System

☐ Enable Email Notifications

☐ Enable SMS Notifications

☐ Require Address Verification

Figure 55: Update Recipient

6. Click in the field you wish to update and make the changes.

Some useful fields that might need updating or you may need to add for a Recipient includes:

- Preferred Phone – the phone number the Recipient wants used, this overrides the “Phone” field in [Figure 55](#) and does not get overwritten by the Residential Data Management system.
- Preferred Email – the Email the Recipient prefers that is used to send notifications to, this overrides the “Email” field in [Figure 55](#) and does not get overwritten by the Residential Data Management system.
- Alternative Email – An additional Email that the Recipient wants to include (someone else in their household) to also receive their notifications.

7. Click the options (on=blue, off=white) which apply.
 - a. ADA Required - Click On if the Recipient requires handicap accessibility. This will notify a Courier to place all items on a lower shelf for this Recipient.
 - b. Opt-Out of System – Click On if a Recipient does not want to use the package room for item delivery. The system will not accept any items for this Recipient.
 - c. Enable Email Notifications – On by default. The Recipient will receive Email notifications. Click Off if the Recipient does not want to receive Email notifications.
 - d. Enable SMS Notifications - On by default. The Recipient will receive SMS text notifications. Click Off if the Recipient does not want to receive SMS text notifications.
 - e. Require Address Verification – If this option is On, the Courier must verify the address before delivering the item. This is useful when there are multiple Recipients with the same name living in the building, designed to prevent mis-deliveries.
8. When complete, click the **Update Recipient** (checkmark) button. Click **Cancel** to exit the page and not save the changes. See [Figure 55](#).
9. (For Recipient's that were added manually) On the Recipient Detail page, you can also click the **Deactivate Recipient** (X) button to deactivate the Recipient. You cannot use this process to remove recipients who are in the Residential Data Management program (daily file).

If the recipient is deactivated and they attempt to use a PIN/QR Code to access the room, they will receive a message "Access Denied" on the kiosk and the door will not open. They should reach out to staff.

Manually Adding a Recipient

If you need to manually add a Recipient to your database (to use the package room), follow this procedure.

To manually add a Recipient:

1. From the Portal, click the **Menu** button on the left and choose **Recipients**.
The Recipients page opens.
2. Click the **Add Recipient** (+) button. See [Figure 56](#).

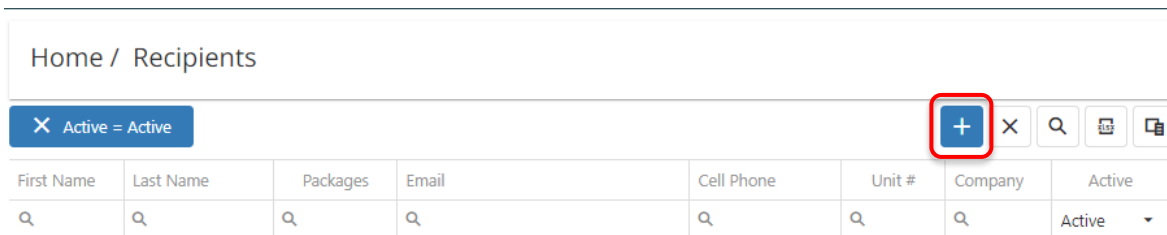


Figure 56: Add a Recipient or search for a Recipient

The Create Recipient page opens, see [Figure 57](#).

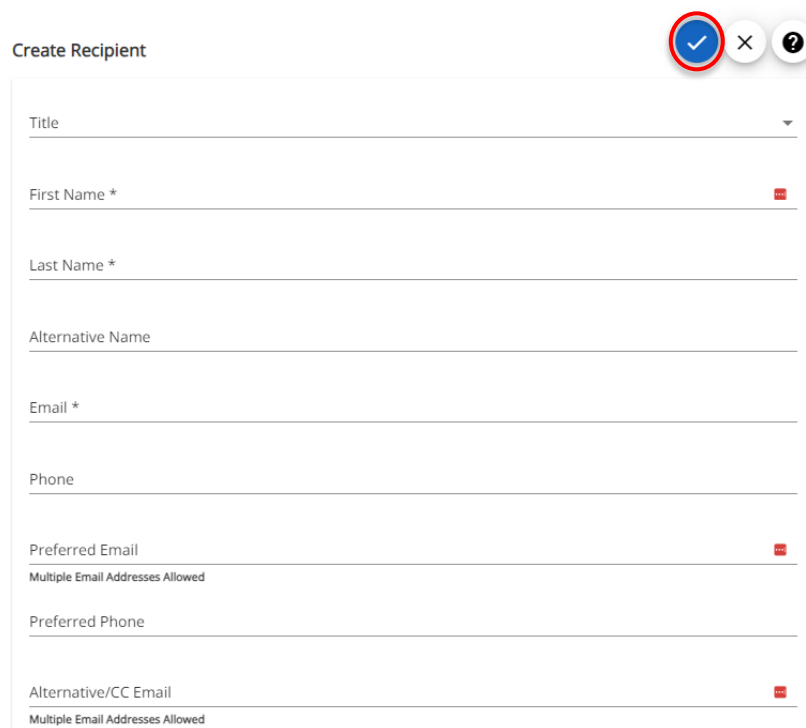


Figure 57: Create Recipient page

3. Fill in the form. When finished, click the **Create Recipient** (checkmark) button. See [Figure 57](#).

This adds a new Recipient.

See the previous section for an explanation of some of the fields.

Deactivating a Recipient

You can only deactivate a recipient if they were added manually (see [Manually Adding a Recipient](#)). You cannot use this process to remove recipients who are in your Residential Data Management program (daily file).

1. From the Portal, click the **Menu** button on the left and choose **Recipients**.
2. Enter the Recipient's First or Last Name in the appropriate column.
3. Mouse over the Recipient you want to update, the area turns blue, click anywhere in that area.
4. On the Recipient Detail page, click the **Deactivate Recipient** (X) button to deactivate the Recipient, see [Figure 58](#).



Figure 58: Deactivate a Recipient

If the recipient is deactivated and they attempt to use a PIN/QR Code to access the room, they will receive a message "Assess Denied" on the kiosk and the door will not open. They should reach out to staff.

If a Recipient Does Not Have Their PIN to Pick Up Their Item

In some instances, a Recipient may need assistance picking up their item because they did not receive notification, or they don't have their notification which includes their QR Code or PIN.

When a Recipient asks for assistance, you can help them in the following ways:

- If the PIN is still active, look up the Recipient's PIN in the Portal. See the following procedures.
- Perform an assisted pick up at the Kiosk (if you do not want a Recipient to have access to the room without supervision), see the *Smart Package Room User's Guide* or the *Smart Package Room Lite User's Guide* for instructions.
- If the PIN is no longer active, you can provide a single entry, one-time use PIN to get into the room, see [Generating a Single Entry, One-Time Access PIN](#).

To look up a Recipient's PIN:

1. Confirm that the Recipient says who they say they are.
2. Log in to the Portal, click the **Main Menu** button on the left and choose **Recipients**.

The Recipients page opens. See [Figure 59](#).



First Name	Last Name	Packages	Email	Cell Phone	Unit #	Company	Active
Q	Q	Q	Q	Q	Q	Q	Active

Figure 59: Search for a Recipient

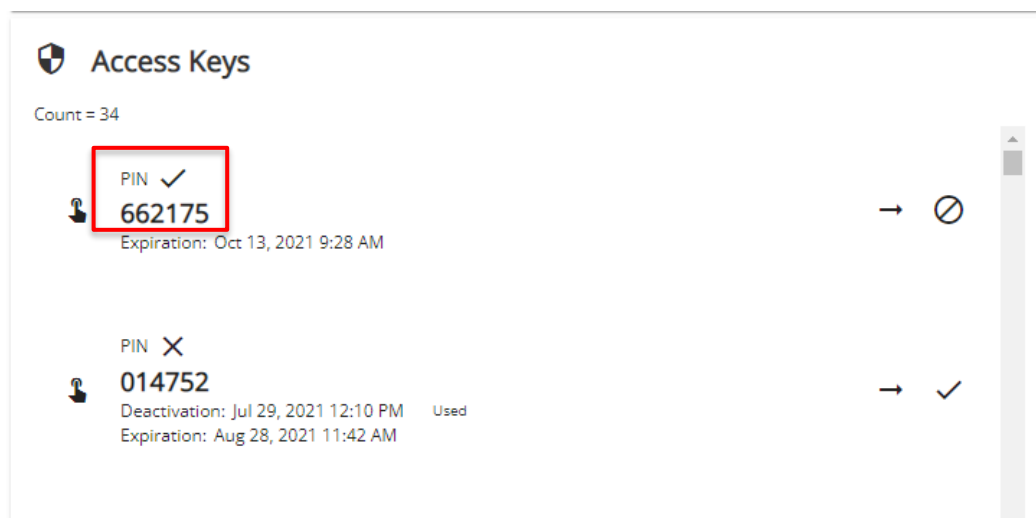
3. Enter the Recipients Last Name in the Last Name Search box. See [Figure 59](#).

As you type, the system starts populating with matching criteria.

4. Click the recipient (as you mouse over, the area turns blue).

The Recipient Detail page opens.

5. Scroll to the Access Keys and note the PIN. An active PIN, indicating an item is in the room, will display a checkmark. See [Figure 60](#). You may see other PINS listed under this Recipient, however if an "x" displays this indicates that the PIN was already used and is no longer active.



Access Keys

Count = 34

PIN ✓	662175	Expiration: Oct 13, 2021 9:28 AM	→	⊘
PIN ✗	014752	Deactivation: Jul 29, 2021 12:10 PM Used Expiration: Aug 28, 2021 11:42 AM	→	✓

Figure 60: Recipient Details page

-
6. Log out of the Portal.
 7. At the Kiosk, **Touch to Begin**.

The Enter Your PIN screen displays.

8. Enter the Recipient's 6-digit PIN.

The Kiosk should display the room and the location of their item.

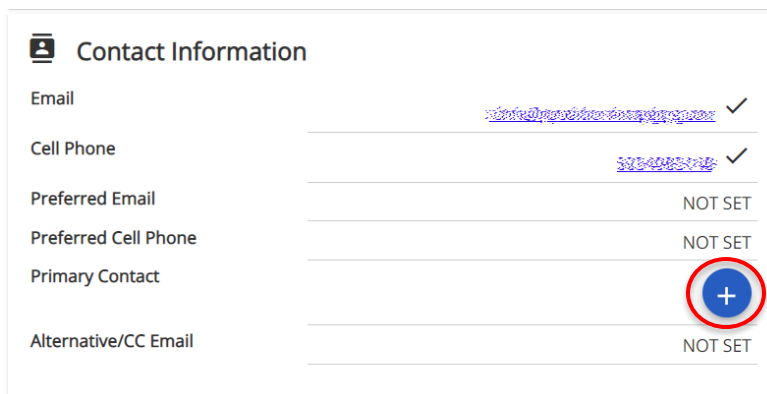
Note: If a Recipient does not have contact information to receive notifications or does not wish to use the package room, you can Opt them Out of the Room. See the option "Opt-Out of System" in [Updating an Existing Recipient](#).

Changing a Primary Contact for a Recipient

Changing a primary contact for a recipient grants another recipient in the building the ability to pick up packages on the recipient's behalf. Also referred to as the "Preferred Contact".

To change a primary contact for a recipient:

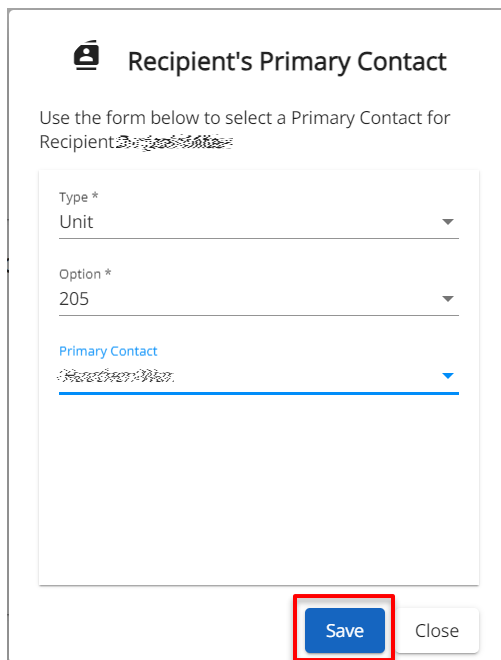
1. In the Portal, click **Recipients**.
2. Locate and click the recipient you want to add the Primary Contact for.
3. In the "Primary Contact" field, click the **Add Preferred Contact (+)** button, see [Figure 61](#).



The image shows a 'Contact Information' form with several fields. The 'Primary Contact' field is highlighted with a red circle around a blue '+' button, indicating where to click to add a new contact. The other fields are: Email (with a checkmark), Cell Phone (with a checkmark), Preferred Email (NOT SET), Preferred Cell Phone (NOT SET), and Alternative/CC Email (NOT SET).

Figure 61: Add Preferred Contact button

4. From the Recipient's Primary Contact dialog, click the dropdowns and select an existing recipient from the dropdown lists: Company/Unit, Number and Primary Contact Recipient. See [Figure 62](#).



The image shows the 'Recipient's Primary Contact' dialog box. It contains three dropdown menus: 'Type *' (set to 'Unit'), 'Option *' (set to '205'), and 'Primary Contact' (set to 'Recipients'). Below the dropdowns are 'Save' and 'Close' buttons. The 'Save' button is highlighted with a red rectangle.

Figure 62: Primary Contact window

5. Click **Save**.

A Recipient Needs Access to Your Package Room

If a Recipient needs access to your package room, Staff can provide a single entry, one-time use PIN to get into the room.

You can create and send a Recipient a Single Access PIN using the Portal via the Quick Actions menu or from the Recipients tab.

Please Note: This feature will override standard room security and should be used when needed. If you have any additional questions regarding room security, please contact SPRSupport@position-imaging.com.

Quick Actions Instructions

1. From the Portal, click **Quick Actions**. See [Figure 63](#).
2. Then select, **Send One-time Access PIN**. See [Figure 63](#).

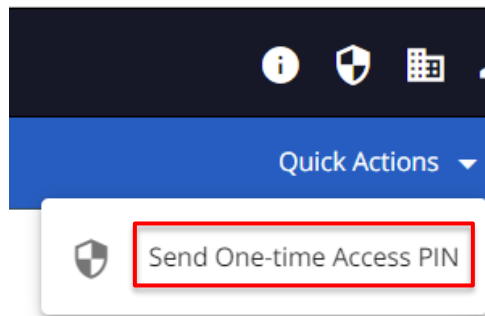


Figure 63: Send Single Access Pin selection

The Send One-Time Access PIN dialog opens, see [Figure 64](#).

A screenshot of a dialog box titled 'SEND ONE-TIME ACCESS PIN'. The title is in a blue bar at the top. Below the title, there is a paragraph of text: 'Use the form below to send a One-Time Access PIN. The selected user will receive an SMS or Email notification that will contain a PIN for a one-time access to the package room whether or not the room contains a package for them.' Below this text is a form with a label 'Select Recipient:' followed by a dropdown menu. The dropdown menu is open, showing a list of names. The first name is highlighted with a red rectangular box. Below the dropdown menu is a button labeled 'Show more options...' which is also highlighted with a red rectangular box. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Generate'. The 'Generate' button is highlighted with a red rectangular box.

Figure 64: Send One-Time Access Key dialog

3. From the Select Recipient area, start typing in the name of the Recipient.
A dropdown menu will auto populate with Recipient names.
4. Select the Recipient's name.
5. Click to **Show more options**:
 - a. From the "Send notification via" pulldown menu, choose Email, SMS (text), or Both.
 - b. Select the date you want the access to expire (default is 24 hours).
6. Click **Generate**. See [Figure 64](#).

The Recipient will receive the one-time access notification via, Email, text or both, depending on what you chose.

Recipient Tab Instructions

1. From the Portal, go to the **Recipients** tab.
2. Locate and click the Recipient you need to grant access for.
3. From the Recipient's page, click the **Shield** icon in the upper-right, see [Figure 65](#).

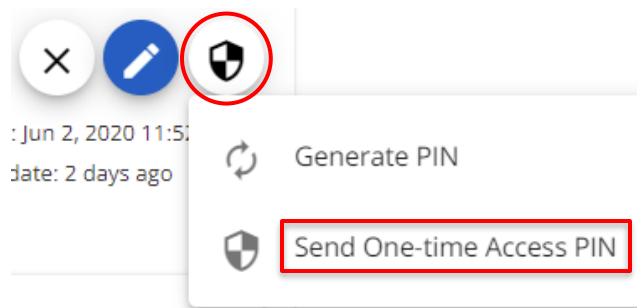


Figure 65: Shield icon

4. Choose **Send One-time Access PIN**.
5. From the Send One-Time Access Key dialog, select these additional options:
 - a. From the "Send notification via" pulldown menu, choose Email, SMS (text), or Both.
 - b. Select the date you want the access to expire (default is 24 hours).
6. Click **Generate**.

The Recipient will receive the one-time access notification via, Email, text or both, depending on what you chose.

How to Find Aged Out Packages

The Room Maintenance section of the kiosk (or MobileKiosk) can give you information about aged out packages, packages that have been sitting in your package room for over 3 days, 7+ days, and 15+ days. See “Storage Time” in the *Smart Package Room User’s Guide* for more information, but you can also search for aged out packages in the Portal.

Once you get the list of aged out packages, you can then obtain the email or phone number of the recipient and send a reminder that they have a package to pick up.

Cleaning out your room of overdue packages frees up space for incoming deliveries. You should periodically check your room for aged-out packages.

- 1. To quickly check for packages that have been in your room for more than 3 days, 5 days, or 1 week+, the main screen of the Portal displays this information in the lower-right corner. See [Figure 66](#).

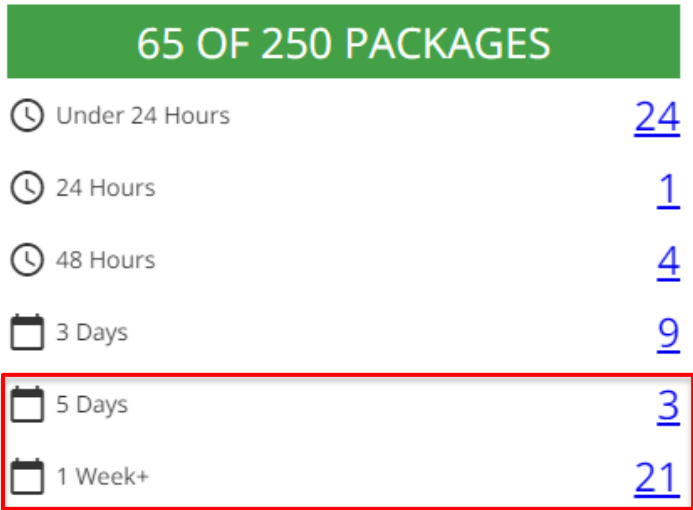


Figure 66: Packages in your room

In the example above, it indicates that there at 3 packages that have been in the room for 5 days and 21 packages that have been in the room for 7+ days. See [Figure 66](#).

- 2. Click on the number of packages, in this example, 21. See [Figure 66](#).

The Packages page opens and displays a list of packages that have been in the room for 7+ days. See [Figure 67](#).

Home / Packages							
Time In Room - > 1 Week		Room - Smart Package Room 1		Status - Checked-In			
Tracking No.	Room	Last Location	Status	Recipient	Unit	Company	Check-In Date
TBADD0009940110 4429050	Smart Package Room 1	L1	CHECKED-IN	Jane Doe 603-333-1234 ✓ JaneD@email.com	9D	-	7 days ago
TBADD0009970023 4428949	Smart Package Room 1	Envelope	CHECKED-IN	Jane Doe 603-333-1234 ✓ JaneD@email.com	7F	-	7 days ago
1Z3876FE0392316496 4428944	Smart Package Room 1	R2	CHECKED-IN	Jane Doe 603-333-1234 ✓ JaneD@email.com	10F	-	7 days ago
1ZR064020397229269 4428941	Smart Package Room 1	L2	CHECKED-IN	Jane Doe 603-333-1234 ✓ JaneD@email.com	9D	-	7 days ago
10000000000061506957 4422466	Smart Package Room 1	R1	CHECKED-IN	Jane Doe 603-333-1234 ✓ JaneD@email.com	9D	-	Jul 8, 2024 10:10 AM

Figure 67: Packages in your room for 7+ days

- In the Recipient column, you can obtain the name, email and phone number of the recipient to contact them to inform them that they have an overdue package to pick up. See [Figure 67](#).

To find aged-out packages with an explicit date:

- To give an exact date to search on, use the Check-In Date search. Click the calendar, click the date. See [Figure 68](#).
- Then, click the symbol (less than/equal to) and select a criterion from the menu (for example, < less than). See [Figure 68](#).

Note: The default filer is “Greater Than or Equal To”. So, if you filter on 5/23/2025, it will show all items with the relevant date after 5/23/2025 at midnight.

Unit	Company	Check-In Date
Q	Q	< 5/23/2025

<

MAY 2025

>

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

>=

5/23/2025

<=

= Equals

≠ Does not equal

< Less than

> Greater than

<= Less than or equal to

>= Greater than or equal to

Between

Reset

Figure 68: Enter a specific date to search on

The page populates with the matching criteria, all packages checked-in prior to 5/23/2025. See [Figure 69](#).

Home / Packages

Check-In Date - Fri May 23, 2025 00:00:00 GMT-0400 (Eastern Daylight Time) Room - Warehouse Status - Checked-In

Tracking No.	Room	Last Location	Status	First Name	Last Name	Email	Mobile Phone	Unit	Company	Check-In Date
67694	Warehouse	MOVE IT	CHECKED-IN	Karen	Resident	[REDACTED]	603-709-512	220	-	May 22, 2025 4:35 PM
67692	Warehouse	MOVE IT	CHECKED-IN	Sydney	[REDACTED]	[REDACTED]	214-471-6210	-	-	May 22, 2025 4:34 PM
67691	Warehouse	MOVE IT	CHECKED-IN	Tom	[REDACTED]	[REDACTED]	503-226-4506	228	-	May 22, 2025 4:33 PM
67690	Warehouse	MOVE IT	CHECKED-IN	Karen	[REDACTED]	[REDACTED]	1631-925-0942	-	-	May 22, 2025 4:31 PM

Figure 69: Enter Recipient name in Search field

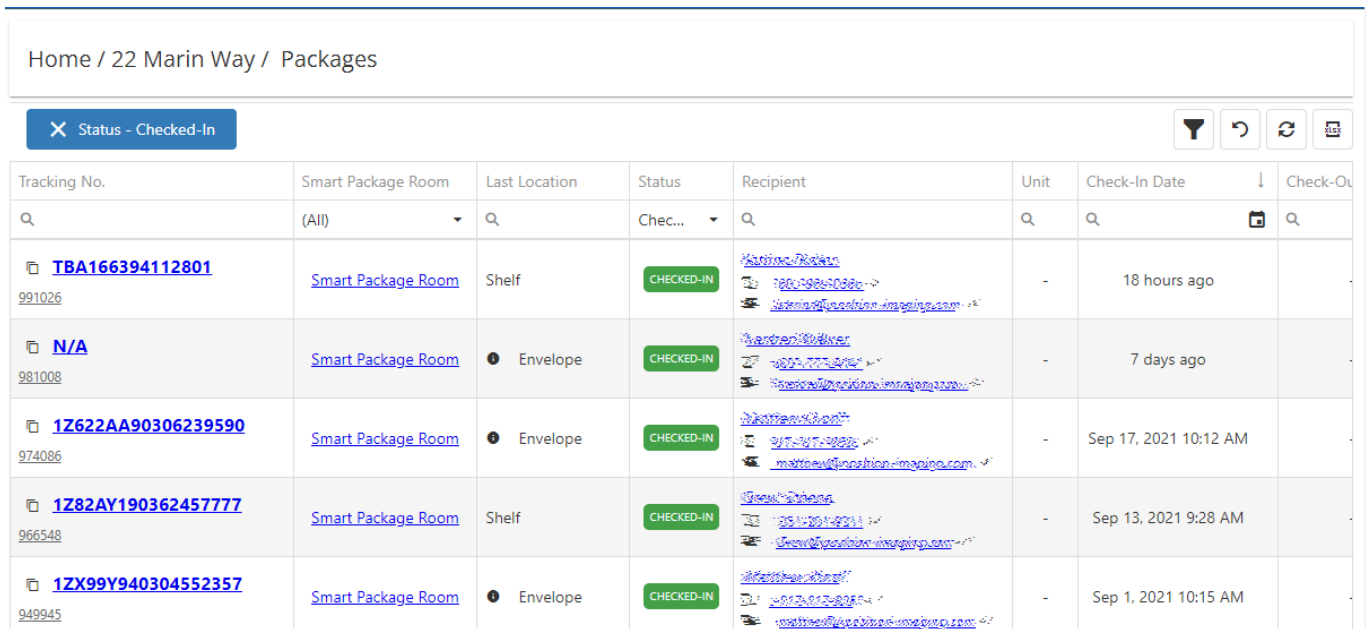
In the Last Name and First Name column, you can obtain the name, email, and phone number of the recipient to contact them to inform them that they have an overdue package to pick up. See [Figure 69](#).

Searching for a Package

If a Recipient is having trouble locating their item (package), you can use the Portal to assist with the search.

1. Gather as much information from the Recipient.
 - Recipient Name
 - Unit #
 - Date item was delivered
 - Tracking # if it was scanned
2. From the Portal, click the **Main** menu on the left, then click **Packages**.

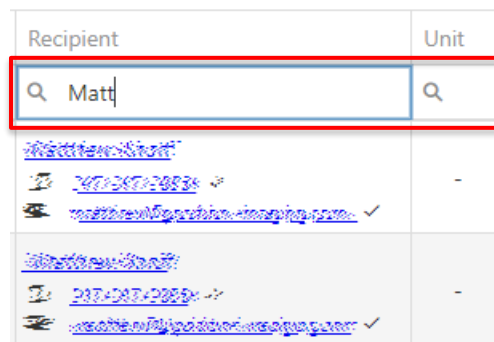
The Packages page opens. See [Figure 70](#).



Home / 22 Marin Way / Packages							
X Status - Checked-In							
Tracking No.	Smart Package Room	Last Location	Status	Recipient	Unit	Check-In Date	Check-Out
Q	(All)	Q	Chec...	Q	Q	Q	Q
TBA166394112801 991026	Smart Package Room	Shelf	CHECKED-IN	Matthew@fusion.com matt@fusion.com	-	18 hours ago	
N/A 981008	Smart Package Room	Envelope	CHECKED-IN	Matthew@fusion.com matt@fusion.com	-	7 days ago	
1Z622AA90306239590 974086	Smart Package Room	Envelope	CHECKED-IN	Matthew@fusion.com matt@fusion.com	-	Sep 17, 2021 10:12 AM	
1Z82AY190362457777 966548	Smart Package Room	Shelf	CHECKED-IN	Matthew@fusion.com matt@fusion.com	-	Sep 13, 2021 9:28 AM	
1ZX99Y940304552357 949945	Smart Package Room	Envelope	CHECKED-IN	Matthew@fusion.com matt@fusion.com	-	Sep 1, 2021 10:15 AM	

Figure 70: Packages page

3. Enter the Recipient's name in the **Recipient** Search field or Unit # in the **Unit** Search field. As you type, the field starts populating with matching criteria. See [Figure 71](#).



Recipient	Unit
Q Matt	Q
Matthew@fusion.com	-
matt@fusion.com	-

Figure 71: Enter Recipient name in Search field

-
- From the Status field, select (All) to display all items that have entered or exited the package room for the recipient or unit, see [Figure 72](#).

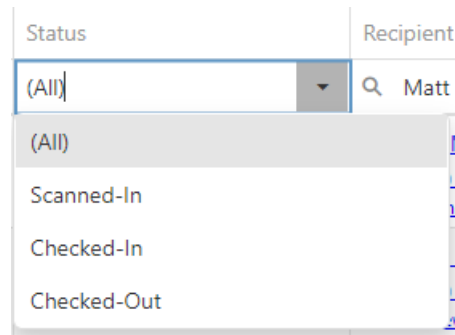


Figure 72: Item status

- Hover your cursor over** the item **Check-In Date** column to display the timestamp, see [Figure 73](#).
If you click the clock, it will change the date view from day to the exact date/time.

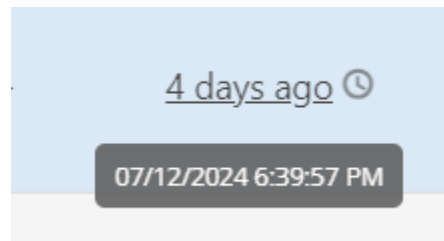


Figure 73: Timestamp displays

- If you think this is the item, click the line to open the Package Detail page.

7. Scroll to the **Timeline** and the **Room View** section. In the Timeline, locate the event you would like to see more of. Click the time. See [Figure 74](#).

Note: If the item is delivered to a non-standard area or Smart Package Room Lite, there will be less recorded events in the timeline than an item delivered to a shelf.

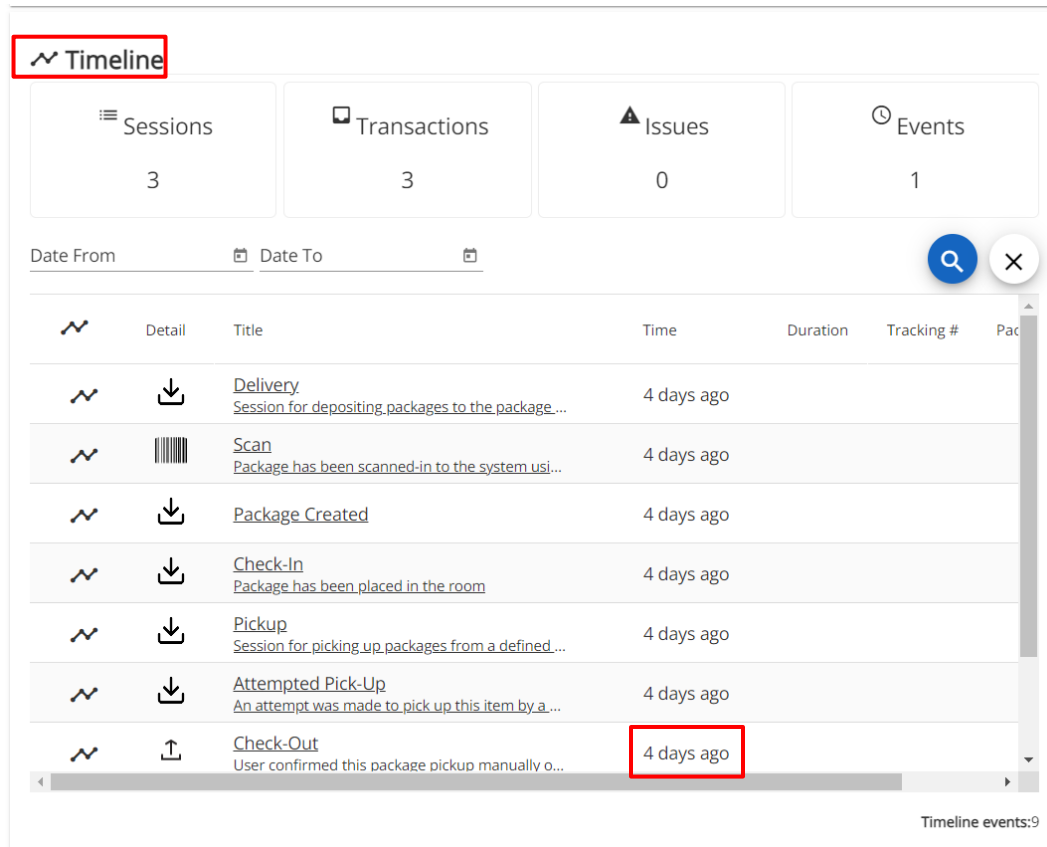


Figure 74: Room View section

8. The video jumps to the approximate location. The blue circle indicates the time you clicked on in the Timeline (above). Use the right and left arrows below the video footage to click through the images to identify the sequence of events. See [Figure 75](#).

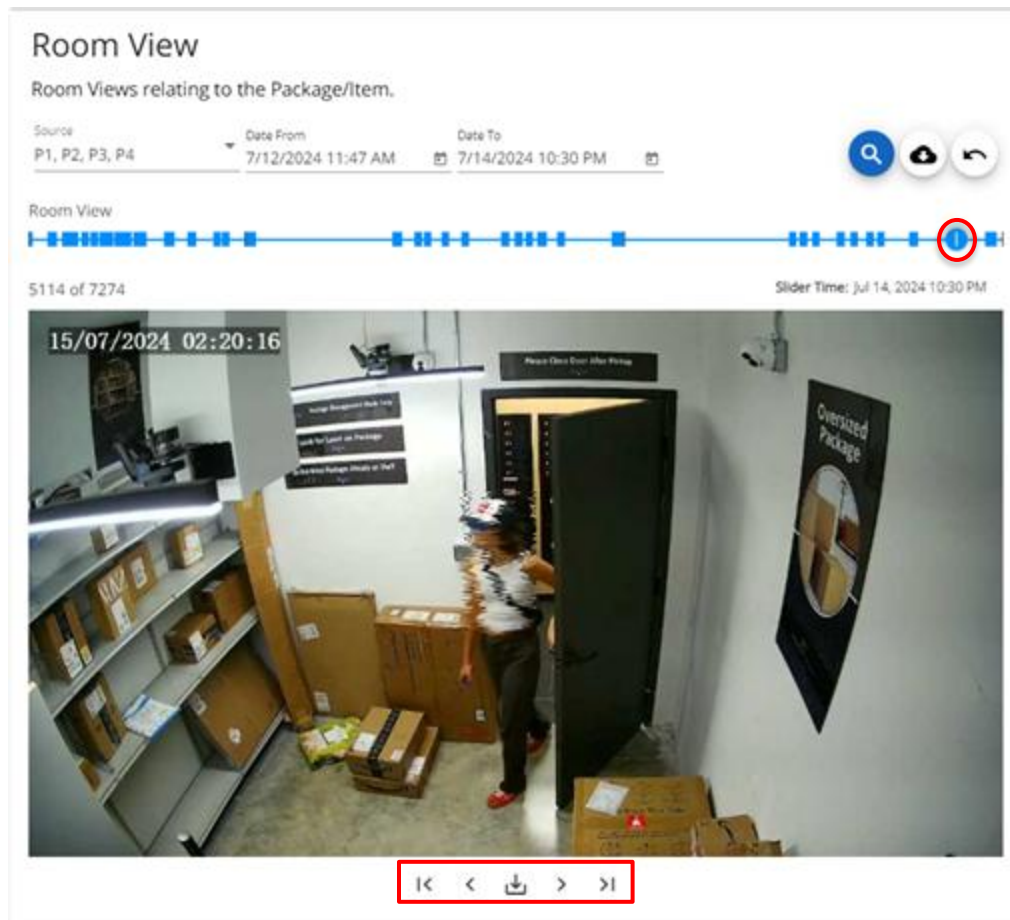


Figure 75: Package room images by sequence of events

Adding Package Notes

The Portal allows you to assign package notes to a delivered package. Notes can inform a recipient that their package has specific requirements. You can add package notes but activate when necessary. These notes are all customizable and can include:

- Perishable (default) – Recipient should pick up as soon as possible
- Signature Required – If you need a package to require a signature upon pick up
- ESD – A package might include an electronic device
- Front Desk – A package could be expensive and safer to place and pick up at the front desk

To add package notes to your system:

1. From the Portal, click the **Main** menu on the left, then click **Properties**.
2. Click to select your property.
The Properties page opens.
3. Scroll to the **Package Notes** section, see [Figure 76](#).



Figure 76: Package Notes on Properties page

4. Click the View Package Notes (pencil) button. See [Figure 76](#).

The default package notes (if any) display. You can edit any of the default notes and you can add your own package notes. See [Figure 77](#).

Home / 22 Marin Way / Package Notes

22 Marin Way Package Notes

Default Package Notes

↶

↷

↺

+

No.	Name	Descript...	Package Notes Subject (Email Only)	SMS Message	Email Message	Staff Visible Only	Is Active		
	Q	Q	Q	Q	Q	(All) ▾	(All) ▾		
1	Perishable	Contains items likely to decay or go bad quickly such as fresh food, flowers etc.	Includes a perishable	Includes a perishable	IMPORT... One of these packages is perishab... Please pickup as soon as possible	No	Yes	Edit	Delete
2	Signature Required	Package that require signature captured upon pick up	Signature required on pick up	Signature required on pick up	Signature will be required on pick up	No	Yes	Edit	Delete

?

Figure 77: Customized Package Notes

- Click **Add a Note (+)** button. See [Figure 77](#).
The package Notes dialog opens. See [Figure 78](#).

Package Notes

×

Name: *

Description:

Package Notes Subject (Email Only): *

SMS Message: *

Email Message: *

Staff Visible Only:

▾

Is Active:

Yes

▾

Save

Cancel

Maximum length of 15 characters

Figure 78: Add a Note - Package Notes dialog

- Fill in the fields, click **Save**. See the table below for a description and example of each field.

Field	Description	Example
Name	What name will be displayed in the UI, when staff/courier checks in the package. Note: Keep this text short.	Perishable Signature Required Front Desk
Description	A brief description of the note, why it is needed.	Contains items likely to decay or go bad quickly such as fresh food, flowers etc. Packages that require a signature upon pick up.
Package Notes Subject (Email Only)	What is displayed in the Subject line of the Notification Email.	Includes a perishable. Signature required on pick up.
SMS Message	What is displayed in the Text Notification. Note: Can be no longer than 15 characters.	Perishable item Needs Signature
Email Message	What is displayed in the body text of the Email Notification	IMPORTANT: One of these packages is perishable. Please pick up as soon as possible. Signature will be required on pick up.
Staff Visible Only	Select: Yes – If you only want notes to be visible to Staff. No - If you want notes visible to couriers, staff, and all.	N/A
Is Active	Select: Yes - If you want this note to be displayed and active. No - If you <i>do not</i> want the note displayed and active.	N/A

7. You can also click **Edit** in each note to edit/change the note. Click **Delete** to remove the note. Click **Revert to Default** to set the notes to the defaults set up at the time of installation.

Switching Properties and Switching Rooms

If your property owns multiple properties or your property has multiple package rooms, you can switch between properties and/or choose which room you want to view information about.

How to Switch Between Properties

The Portal has two primary tiers of staff levels: “Staff” and “Manager”. If your Portal account has “Manager” privileges, you will be permitted to access multiple properties across your company’s account.

1. From the Portal’s home page, click on the **Switch Property** (Building) icon in the top-right corner. See [Figure 79](#).

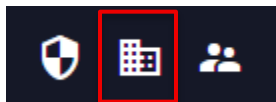


Figure 79: Switch Property icon

The Switch Property dialog opens.

2. Click the **drop-down menu** beneath your company and **select** whichever **property** you wish to manage. See [Figure 80](#).

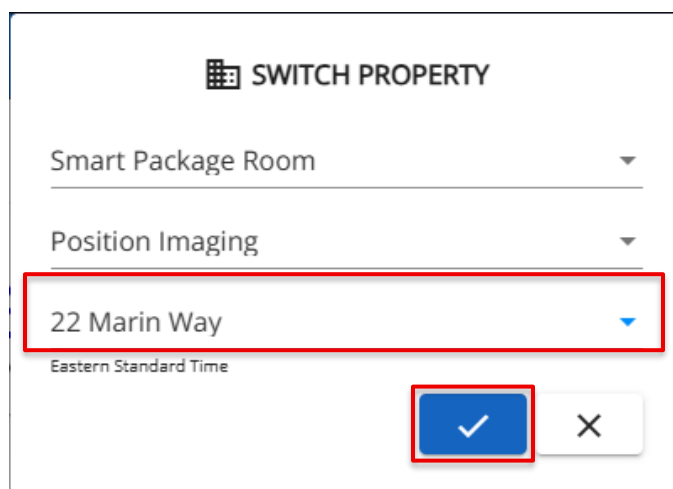


Figure 80: Switch Property dialog

3. Click the **checkmark** button, see [Figure 80](#).

Your Home dashboard will display the new property, and your staff PIN will now be active at the other property for use.

How to Switch Between Rooms

If your property has more than one package room, you can change which Room appears on your homepage. You can also view information about all the rooms at once or choose to view information about only one room.

Choosing a Room for Your Homepage

1. From the Portal, click the **Home** tab.
2. In the upper-left (below your Property name and to the right of Home), click the **Switch Room** (down arrow) button and choose a room from the pulldown menu. See [Figure 81](#).

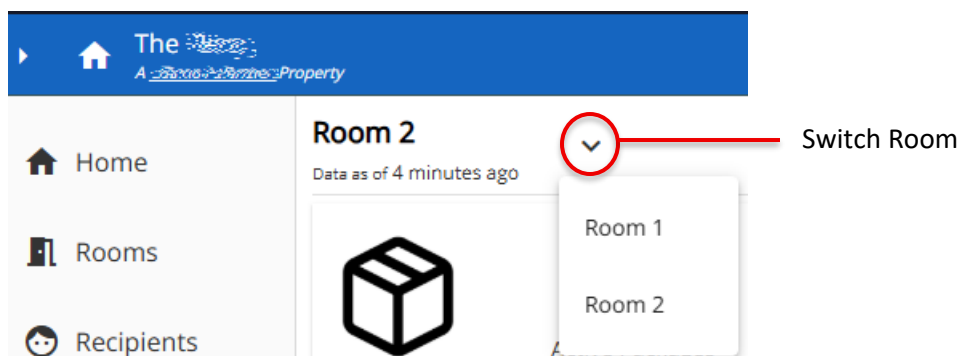


Figure 81: Switch Room pulldown menu

Each tab will now display information about the room you chose.

Note: You can easily change to another Room or view information about all your rooms from the Room column in each tab. Most tabs have a Room column.

Viewing Information About All Rooms or a Single Room

1. From the Portal's home page, click **Rooms**.
2. Click the Room column, then choose a room from the **drop-down** menu. See [Figure 82](#).

The default is set to All (displays all rooms).

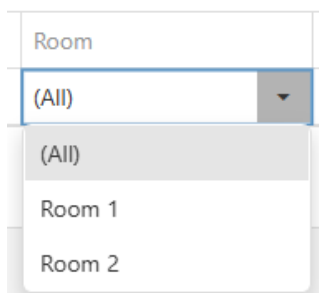


Figure 82: Choose a room

Most tabs allow you to choose a room from the Room column of that tab (including from the Room View), so depending on what tab you are in, you can always choose a Room.

Exporting Data About Your Package Room

You can export an Excel spreadsheet that gives you helpful data about the packages in your package room. The report includes information such as:

- Tracking Number (if available)
- Last Location (If your room has package type (flat, oversized) locations)
- Recipient
- Unit number
- When a package was delivered (checked-in)
- When a package was picked up (checked-out)
- How long the package has been in the room

This data can be helpful by determining the number of days a package stays in a room, who's receiving packages, and how many flat packages vs. oversized are being delivered.

How to Export Package Room Data

If you would like to export data from your package room:

1. From the SPR Web Portal, click the Open/Close Menu to open the Main menu. See [Figure 83](#).



Figure 83: Open/Close Menu

2. Click **Packages**, see [Figure 84](#).

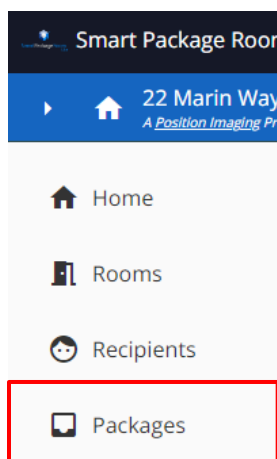


Figure 84: Packages selection

The Packages window opens.

3. In the top-right of the Packages window, click the **Export all Data** button. See [Figure 85](#).



Figure 85: Export all Data button

The system gathers room information about packages in the room and downloads the file to your computer, titled “*Packages.xlsx*”.

- Open the file to view the current inventory of packages in your package room. See [Figure 86](#) for a sample Excel file.

Tracking No.	Smart Package Room	Last Location	Status	Recipient	Unit	Check-In Date	Check-Out Date	Time in Room (Hours)
N/A	DevSetup	Flat	Checked-In	Debug Resident Test User	[Unit Test 321]	10/21/2021		1967.46
420038859374889684090195206754	Room 2	Undefined	Checked-In	Debug Resident Test User		9/30/2021	9/29/2021	0.00
TBA158730208801	Room 2	Undefined	Checked-In	Debug Resident Test User		9/30/2021	9/29/2021	0.00
9622080430005078647700519000006581	Room 2	Undefined	Checked-In	Debug Resident Test User		9/30/2021		2471.57
9622080430005078647700518248308737	Room 2	Undefined	Checked-In	Debug Resident Test User		9/30/2021		2471.57
00000064900078931450	Room 2	Undefined	Checked-In	Debug Resident Test User		9/30/2021		2471.58

Figure 86: Sample exported Excel spreadsheet

Note: The Time in Room column displays packages in red which indicates any package that has been in the room longer than the configured storage time (typically 72 hours).