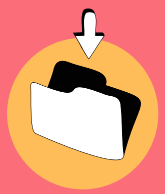
capsa

Quick Start Guide

Create a project. Invite your team. Upload your first documents.



Welcome to Capsa.

This guide gets you from zero to working project in minutes.

No theory. Just the steps.

Create Your Account

There are two ways to join Capsa:

Option A – You are creating a new project

1. Go to the Capsa website.
2. Click [Sign Up].
3. Enter your details.
4. Create your password.
5. Confirm your email address.

You will then be taken to your Dashboard.

Option B – You have been invited to a project

1. Open the invitation email.
2. Click the link.
3. Create your account (if new) or log in (if existing).
4. Confirm your email address if prompted.

Once complete, the project will appear on your Dashboard.

Each user must use their own unique email address.

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Navigate around the app

Use the Capsa + to access further options.

Click on the Capsa C anywhere in the app to take you back to your dashboard.

Your project dashboard, home to your projects performance and use data.

The home of Capsa, this is where you store and access all of your project documents and access the essential features.

Access downloadable reports on documents and users.

Manage and control all your users.

Control and tailor your project in the settings.

log into the portal at
www.app.capsaapp.com

Create a Project

From your Dashboard:

Option 1

Click the [Plus] icon in the header and select [Create New Project].

Option 2

Click [Create New Project] from the welcome panel.

Complete all required fields and click [Create].

Select your subscription, confirm billing, and click [Purchase].

Your project will now appear on your Dashboard.

The user who creates the project becomes the Project Owner.

Invite Your Team

1. Open your project.
2. Go to the Users page.
3. Click [Plus] > [Add User].
4. Enter their email address.
5. Select their role.
6. Click the [Tick] icon to send the invitation.

They will receive an email to join.

Start simple:

- Owner controls billing
- Controller or Lead manages setup
- Creators upload
- Viewers read

You can adjust roles later.

Upload Your Documents

1. Go to the Documents page.
2. Click [Plus] > [Add Document].
3. Drag files in or click the [Cloud] icon.
4. Complete the metadata fields.
5. When the status turns pink, click [Upload All].

Upload documents as individual files.

Revisions should be added using [Add Revision], not as new documents.

Find What You Need

On the Documents page you can:

- Click column headings to sort
- Use the [Search] box
- Use [Filter] to narrow results
- Apply [Tags] to group documents
- Click [Multiple] for bulk actions

No folders. Everything stays searchable and stacked.

Share a Document

To notify a project user:

1. Click the [Plus] icon next to a document.
2. Select [Notify].
3. Choose the user.
4. Confirm.

To share externally:

1. Click [Plus].
2. Select [Transfer].
3. Enter the email address.
4. Confirm.

Sharing stays linked to the document.

Need Help?

For project questions:

Contact your Project Owner, Controller or Lead.

For technical issues:

Click [Plus] in the header > [Help].

For full guides, FAQs and resources:

Visit the Learn and Resources pages on the Capsa website.

That’s it.

You’re up and running.

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Project created.
Team invited.
Documents uploaded.

You're ready.

For full guidance and advanced features, see the Capsa Help Guide.

www.capsaapp.com