

Check-in Scenarios



VisitForm

visitform.com

Check-in Scenarios

The following slides describe how the different check-in scenarios are handled in VisitForm. And how the interaction between guard, visitor, resident and vendor is managed.

Manned access

- 1. Unregistered Visitor
- 2. Unregistered Vendor
- 3. Recurring Visitor
- 4. Recurring Vendor
- 5. Pre-registered Visitor
- 6. Pre-registered Vendor

Unmanned access

- 7. Self check-in Visitor
- 8. Self check-in Vendor

- 1. Unregistered Visitor

1. Visitor tells the guard who they are visiting
2. Guard reaches out to resident via Call or Text (can be done via VisitForm) and confirms the visit
3. Guard enter the visitor's details in VisitForm, clicks the check-in button and opens the gate or turns away the visitor
4. VisitForm automatically sends a text or email notification to resident with the visitor's details

Visitor Vendor

▼ Checked in

These are the visitors who are checked in

| | Resident unit | |
|-------------------------|----------------|----|
| New visitor → | | |
| Jan-26-2022 11:49:21 PM | 302 Las Palmas | |
| Jan-26-2022 11:48:38 PM | 303 Las Palmas | A |
| Jan-26-2022 11:48:07 PM | 304 Las Palmas | |
| Jan-26-2022 11:47:25 PM | 305 Las Palmas | M |
| Jan-26-2022 11:46:57 PM | 306 Las Palmas | |
| Jan-26-2022 11:46:37 PM | 307 Las Palmas | O |
| Jan-26-2022 11:46:13 PM | 308 Las Palmas | / |
| Jan-26-2022 11:45:42 PM | 309 Las Palmas | Ka |
| | 310 Las Palmas | |
| | 311 Las Palmas | |

(step 3 screenshot) Guard selects the resident unit from the residents list

(step 3 screenshot) Guard enter the details about the visitor and clicks Check in

| Name | Auto-Admit Name | Allowed | Require call | Plate number | Notified | Phone | Comment | |
|------------------|-----------------|---------|--------------|--------------|--------------------------|-------|---------|----------|
| Daniel Rodriguez | | | yes | ABGC4681 | <input type="checkbox"/> | | | Check in |
| | lavion Rosales | Allow | yes | ABYN2771 | <input type="checkbox"/> | | | |

- 2. Unregistered Vendor

1. Visitor tells the guard who they are visiting
2. Guard reaches out to resident via Call or Text (can be done via VisitForm) and confirms the visit
3. Guard enter the vendor's details in VisitForm, clicks check-in and opens the gate or turn away vendor
4. VisitForm automatically sends a text or email notification to resident

Visitor Vendor

▼ Vendors checked in

These are the vendors who are checked in

| | Vendor | Type | Resident unit |
|-------------------------|-----------------------------|--------------------|----------------|
| New vendor → | Hudson Group | Private Contractor | 203 Las Palmas |
| Jan-27-2022 12:10:33 AM | Abshire, Durgan and Johnson | | 106 Las Palmas |
| Jan-27-2022 12:10:22 AM | Amazon | | 106 Las Palmas |
| Jan-27-2022 12:10:09 AM | Amazon Groceries | | 311 Las Palmas |
| Jan-27-2022 12:09:52 AM | AT&T | | 106 Las Palmas |
| Jan-27-2022 12:09:29 AM | Brakus LLC | | 311 Las Palmas |
| Jan-27-2022 12:09:08 AM | Brentons Landscaping | | 102 Las Palmas |
| Jan-27-2022 12:08:48 AM | Dominoes Pizza | | 309 Las Palmas |
| Jan-27-2022 12:08:25 AM | DoorDash | | 405 Las Palmas |
| Jan-27-2022 12:08:13 AM | FedEx | | 406 Las Palmas |
| | CrubHub | | |

(step 3 screenshot) Guard types in the vendor name in the vendor column. This isn't a recurring vendor so it should not already be in the list

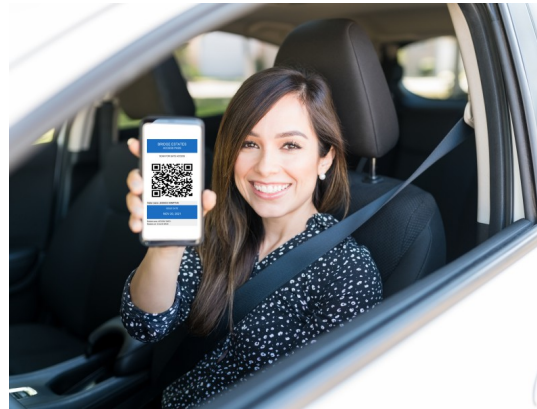
(step 3 screenshot) Guard types in the vendor's information and click Check in

| Type | Resident unit | Allowed | Require call | Representative | Plate number | Notification type | |
|--------------------|----------------|---------|--------------|----------------|--------------|-------------------|----------|
| Private Contractor | 203 Las Palmas | | no | William | AAMT4974 | | Check in |

• 3. Recurring Visitor

VisitForm calls recurring visitors “Auto-Admits”. Which means that each resident unit has a list of persons who are either permanently or temporarily (timespanned) allowed or banned. Each auto-admit person can have a QR-code pass (pdf file which is shown on any handheld device upon arrival) which is issued by the resident via the Resident's portal or by the gatehouse on request from the resident.

1. Visitor shows the QR pass or tells their name
2. Guard either scan (with the VisitForm app) or selects their name in the auto-admit column
3. VisitForm will show if the person is allowed or banned
4. The guard clicks the check-in button and opens the gate. VisitForm automatically sends a text or email to the resident.



(step 1 screenshot) Visitor shows QR code or identify themselves

| 🏠 Resident unit | 👤 Name | 👤 Auto-Admit Name | 👤 ? Allowed |
|------------------|--------|--------------------|-------------|
| 306 Las Palmas ▼ | | Heather Campbell ▾ | Allow |

(step 2 and 3 screenshot) on the desktop version the Allowed column shows if the visitor is allowed to the unit

The screenshot shows the Bridge Estates mobile app interface. At the top, there's a status bar with the time 00:23 and battery level 62%. Below that, a header bar says "Bridge Estates Check in" with a menu icon. The main content area shows a green notification box that says "Allowed" with a close button (X) and the time 12:23 AM. Below this, a message states "Heather Campbell is allowed to the premises" with an "OK" button. Further down, there are input fields for "Resident name" (showing "Thomas Scott") and "Resident Phone #" (with a "Call" button). There's also a "Require Call?" checkbox. At the bottom, there's a "Visitor Name" field and two large buttons: "SCAN" and "CHECK IN >".

(step 3 screenshot) on the app a dialog shows the guard if the visitor is allowed or not. This is the same app the guard use to scan the pass

- 4. Recurring Vendor





VisitForm has a list of recurring vendors which works in similar way to the auto-admits for residents.

1. Vendor tells the guard who they are visiting
2. Guard selects the Vendor and the resident unit they are going to
3. Guard looks in the look-up column information in VisitForm to determine if they are automatically allowed in or reaches out to the resident. If they aren't in the list the guard may check them in anyway after confirming with the resident.
4. Guard click Check-in and opens the gate
5. VisitForm automatically sends a text or email to the resident

Vendor recurring entry, entered by the guard on request by resident

| Vendor | Unit | Name | Errand | Duration | Entry from | Entry to | Banned | Comment | Pass |
|------------------------|-----------------|--------|---------------------|-------------|------------|------------|---------|---------|------------------------|
| Ritchies Landscaping ▼ | 105 Las Palmas▼ | Martin | Driveway north side | Temporary ▼ | 02/01/2022 | 02/28/2022 | Allow ▼ | | Create |

(step 3 screenshot) Guard selects the vendor during check in

|  Vendor |  Type |  Resident unit |  ? Allowed |
|--|--|---|---|
| Ritchies Landscap... | Private Landscaper | 105 Las Palmas ▼ | Allow |

- 5. Pre-registered Visitor

The pre-registered visitor tab is typically not scheduled visits but rather "from time-to-time" visits. Pre-registered visitors that runs on a user-defined schedule is currently not supported. One possible way with the current setup would be to every month add the scheduled visits as pre-registered. Let us discuss this feature.

1. Resident reaches out to the gatehouse and tell them the name and estimated time of arrival of the expected visitor
2. Guard enters the details in the future-check in tab.
3. When the visitor arrives they tell the guard who they are visiting
4. The guard looks in the pre-check in list and clicks Admit if it matches
5. VisitForm automatically sends a text or email to the resident

| 🕒 Expected arrival | 🏠 Resident unit | 👤 Name | |
|--------------------|------------------|-------------|---------------------------|
| 01/28/2022 5:45 PM | 105 Las Palmas ▼ | Clare David | <button>Register</button> |

(step 2 screenshot) Guard register the visitor and their expected time of arrival

| | | | |
|--------------------|------------------|-------------|--|
| 01/28/2022 5:45 PM | 105 Las Palmas ▼ | Clare David | <button>Admit</button> <button>Remove</button> |
|--------------------|------------------|-------------|--|

(step 4 screenshot) Guard finds the entry and admits the visitor

- 6. Pre-registered Vendor

The pre-registered vendors tab is typically not scheduled visits but rather "from time-to-time" visits. Pre-registered vendors that runs on a user-defined schedule is currently not supported. One possible way with the current setup would be to every month add the scheduled visits as pre-registered. Let us discuss this feature.

1. Resident reaches out to the gatehouse and tell them the name and estimated time of arrival of the expected vendor
2. Guard enters the data in the pre-check in tab.
3. When the visitor arrives they tell the guard who they are visitng
4. The guard looks in the pre-check in list and clicks Check in if it matches
5. VisitForm automatically sends a text or email to the resident

| | 🕒 Expected arrival | 👤 Vendor | 👤 Type | 🏠 Resident unit | |
|-----------------------|---------------------|--------------------|--------------------|------------------|---------------------------|
| Pre-Register vendor → | 02/01/2022 07:30 AM | Brentons Landsc... | Private Landscaper | 103 Las Palmas ▾ | <button>Register</button> |

(step 2 screenshot) Guard register the vendor and their expected time of arrival

| | | | | | |
|-------------------------|---------------------|--------------------|--------------------|------------------|--|
| Jan-27-2022 12:51:32 AM | 02/01/2022 07:30 AM | Brentons Landsc... | Private Landscaper | 103 Las Palmas ▾ | <button>Admit</button> <button>Remove</button> |
|-------------------------|---------------------|--------------------|--------------------|------------------|--|

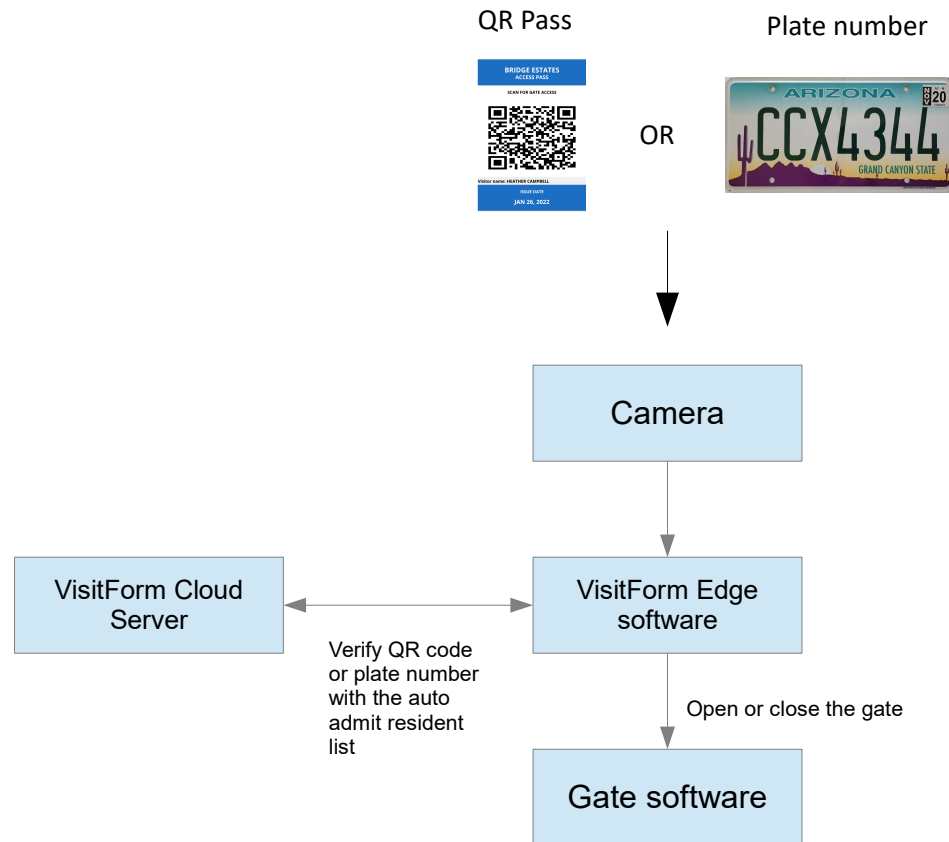
(step 4 screenshot) Guard admits the vendor when they arrive to the gate

- 7. Self check-in visitor / Unmanned gate access

Self check-in with QR-code requires a software integration with the camera and gate system. VisitForm can be integrated with a wide range of gate systems.

Resident uses the VisitForm Residents' portal app or contacts the gate house with the details of the person they want to admit. A QR pass is generated and emailed to the visitor. This happens any time before the actual visit.

1. The person with the QR-pass arrives to the gatehouse and scans the QR code to a camera that has an integration with VisitForm.
2. VisitForm verifies the QR code and the unit they want to check in to.
3. VisitForm sends a request to the gate system to open the gate.



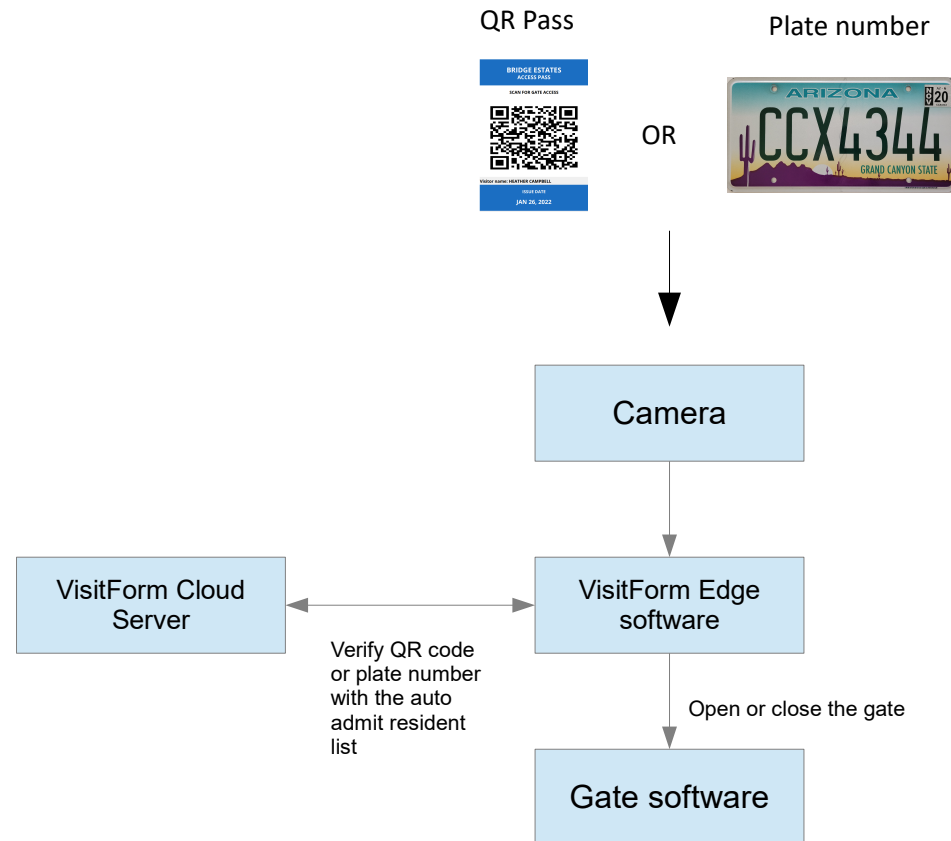
VisitForm also has an API endpoint where the gate system software can verify the QR pass itself via a REST call.

- 8. Self check-in Vendor / Unmanned gate access

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