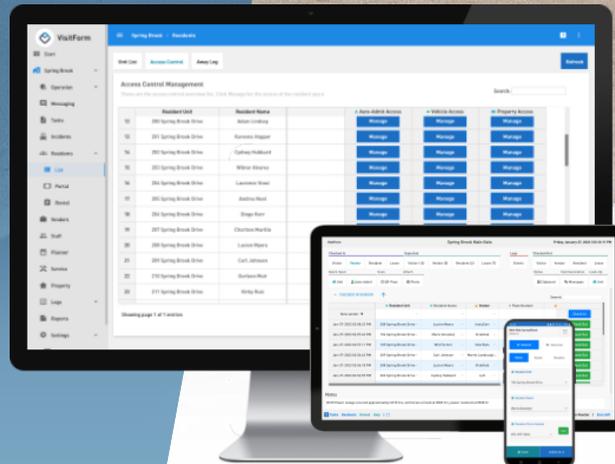




VisitForm

VisitForm Gatehouse Attendant Manual





Contents

Visitor Types.....	3
Checked In (Visitor, Vendor, Resident).....	3
Checking in an Unexpected Visitor	3
Checking in an Unexpected Vendor	5
Checking in an Unexpected Resident	6
Details.....	7
Expected (Visitor, Vendor, Resident).....	8
How to Pre-Register a Visitor.....	8
How to check in an Expected Visitor.....	10
Scan QR-Pass.....	10
Incidents.....	11
Reports.....	11
Community.....	11
Unit.....	11
Person.....	12
Away.....	14

Visitors, residents, and vendors accessing the property are checked-in using VisitForm on a daily basis. With this comprehensive system, they can collect essential information from visitors and notify residents of their arrivals. Further, Attendants have the authority to report any incidents that may occur during their shifts. Attendants working subsequent shifts have access to this information via VisitForm, which ensures continuous awareness of any ongoing situations.

A single page contains all Attendant actions.

Visitor Types

Under the Check In and Expected menus, there are options for Visitors, Vendors, and Residents. When registering or checking in a guest who arrives at the property, choose the appropriate menu option based on their reason for visiting.

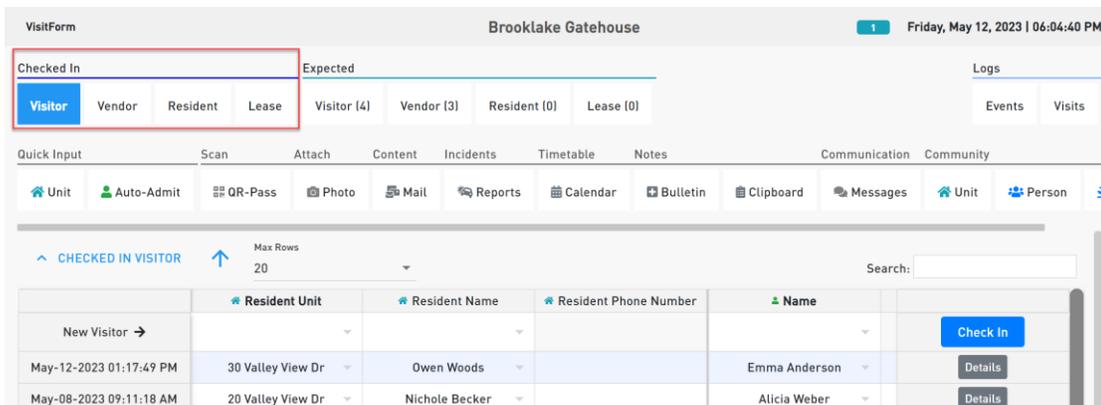
- **Visitor** – Visiting a resident
- **Vendor** – Visiting to perform work
- **Resident** – Someone who lives at the property (but coming through the gate)

Checked In (Visitor, Vendor, Resident)

To check in an "unexpected" visitor, use the menu options under the Checked In section.

Checking in an Unexpected Visitor

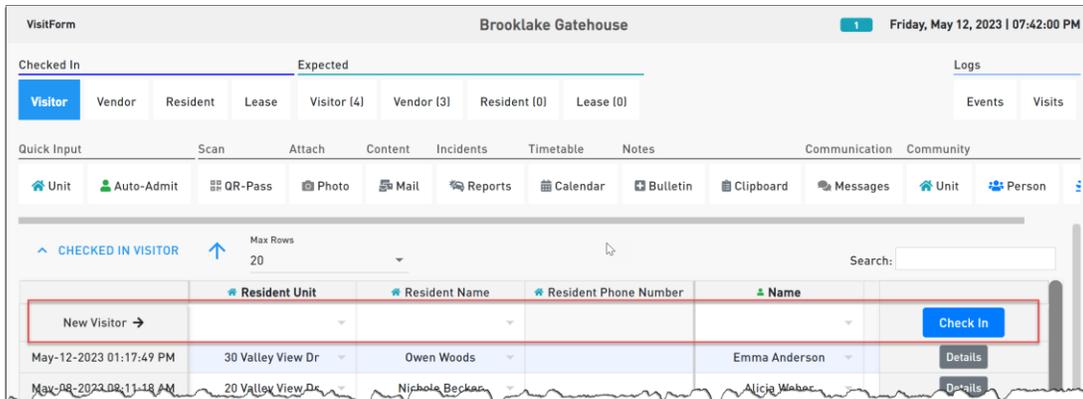
1. Click the Visitor type – **Visitor** - from the **Checked In** menu options.



The screenshot shows the VisitForm interface for Brooklake Gatehouse. The 'Checked In' menu is open, and the 'Visitor' option is selected. Below the menu, there is a table of visitor entries. The table has columns for Resident Unit, Resident Name, Resident Phone Number, and Name. The first row is highlighted in blue and has a 'Check In' button next to it. The second row has a 'Details' button next to it. The third row has a 'Details' button next to it.

	Resident Unit	Resident Name	Resident Phone Number	Name	
New Visitor →					Check In
May-12-2023 01:17:49 PM	30 Valley View Dr	Owen Woods		Emma Anderson	Details
May-08-2023 09:11:18 AM	20 Valley View Dr	Nichole Becker		Alicia Weber	Details

2. The first step in checking in an unexpected visitor is to enter the information for the resident he or she is visiting into the top row of the list. This includes the Resident Unit, Resident Name, and optionally the Resident Phone Number. The top row is exclusively used to enter new, unexpected visitor information.



Double-click in any column to open a drop-down selection list.

- Enter the rest of the visitor information in the columns: Visitor Name, Identification information, License Plate number, and Driver's License number. Additional comments can be added to the Comments column. In the Notification Type column, select from Automatic, Call, Email, or Text. When the visitor is checked in, the resident will be notified using the Notification method. Double-click in any column to pop up data selection options.

Note: The Banned column requires no entry. If the named visitor has been previously banned from the property, the column will show Banned, otherwise, Allow.

The list can be scrolled left and right to view all columns using the scroll bar at the bottom of the list.

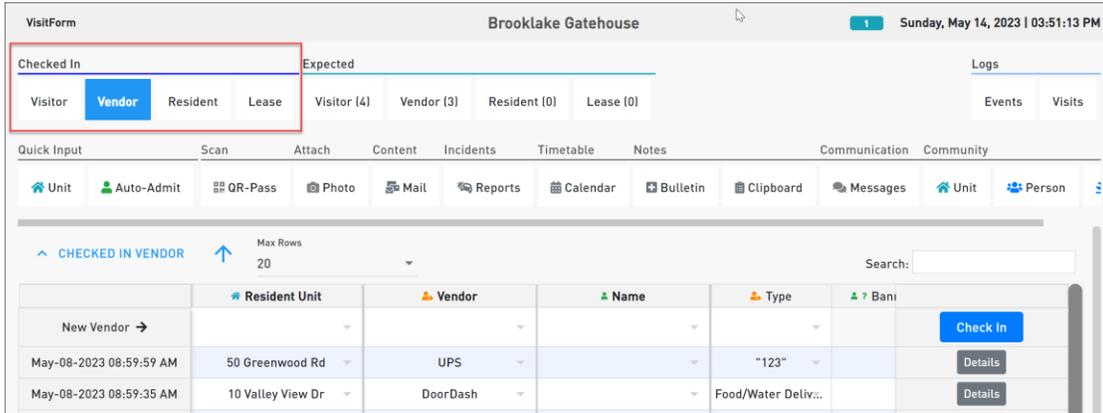
	Unit	Resident Name	Resident Phone Number	Name	Banned	Identification	Plate Number	Driver License #	Comment	No	
New Visitor →											Check In
May-12-2023 01:17:49 PM	ow Dr	Owen Woods		Emma Anderson							Details
May-08-2023 09:11:18 AM	ow Dr	Nichole Becker		Alicia Weber	Allow		NTHYV1600				Details
May-08-2023 09:10:58 AM	ny Way	Samantha Thompson		Harry	Allow		NTHYV6075				Details
May-08-2023 09:10:40 AM	od Rd	Harry Martin		Lee Pierce	Allow		NYJGL9419				Details
May-08-2023 09:09:49 AM	ow Dr	Sarah Hawkins		Paula			NYJRL3083				Details
May-08-2023 09:09:03 AM	ow Dr	Claire Fisher		Henry Wilson			NHMB6456				Details
May-08-2023 09:08:16 AM	ow Dr	Owen Woods		Maria			NYJRF3742				Details

- Once all visitor information is entered, click the **Check In** button on the list's right side. The visitor will automatically be checked in.



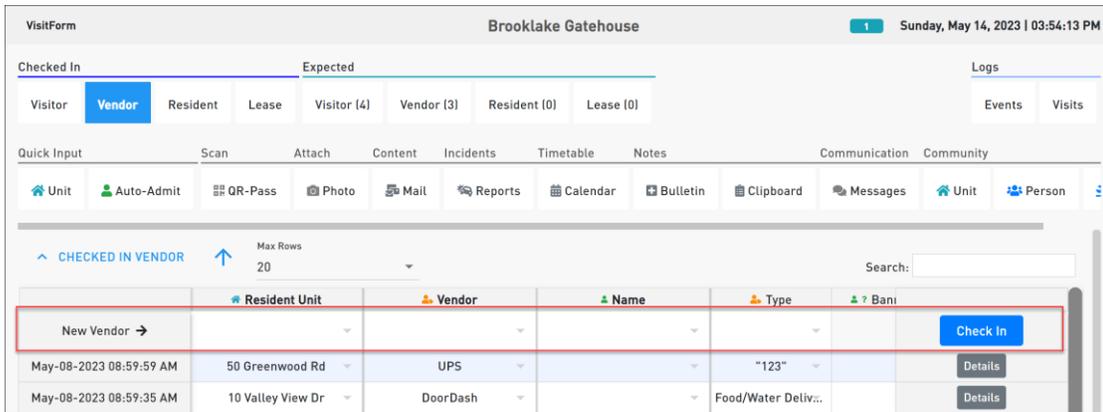
Checking in an Unexpected Vendor

1. Click the Visitor type – **Vendor** - from the **Checked In** menu options.



The screenshot shows the VisitForm interface for Brooklake Gatehouse. The 'Checked In' menu is open, and 'Vendor' is selected. The 'Expected' menu shows counts for Visitor (4), Vendor (3), Resident (0), and Lease (0). The main table has a 'CHECKED IN VENDOR' filter applied. The table columns are Resident Unit, Vendor, Name, Type, and Bani. The first row is 'New Vendor' with a 'Check In' button. Below it are two rows of existing vendor records: one for UPS at 50 Greenwood Rd and one for DoorDash at 10 Valley View Dr.

2. To check in an unexpected vendor, begin by entering the Residential Unit the visitor is visiting, Vendor Name (company), Visitor Name, and type of vendor in the top row of the list. This row is exclusively used to enter new, unexpected visitor information.



This screenshot is identical to the previous one, but the 'New Vendor' row in the table is highlighted with a red border, indicating where to enter new vendor information.

Double-click in any column to open a drop-down selection list.

3. Enter the rest of the visitor information in the columns: Representative, Plate Number, and Notification Type. Additional comments can be added to the Comments column. In the Notification Type column, select from Automatic, Call, Email, or Text. When the visitor is checked in, the resident will be notified using the selected Notification method. Double-click in any column to pop up data selection options.

Note: The Banned column requires no entry. If the named visitor has been previously banned from the property, the column will show Banned, otherwise, Allow.

The list can be scrolled left and right to view all columns using the scroll bar at the bottom of the list.

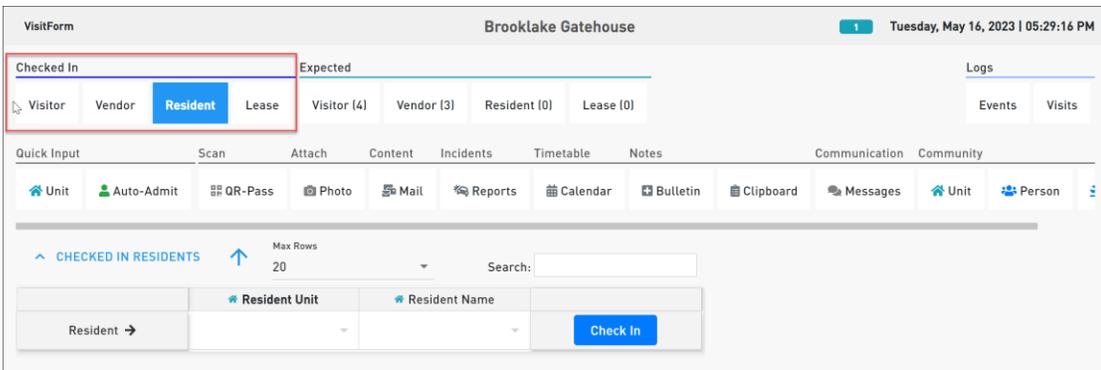
	Init	Vendor	Name	Type	Banned	Require Call	Representative	Plate Number	Notification Type	C	
New Vendor →	-	-	-	-	-	-	-	-	-	-	Check In
May-08-2023 08:59:59 AM	8 Rd	UPS		"123"		no		NYTRV9519			Details
May-08-2023 08:59:35 AM	8 Dr	DoorDash		Food/Water Deliv...		no		NYKTY4827			Details
May-08-2023 08:58:44 AM	8 Dr	Amazon		"123"		no		NYART5431			Details
May-08-2023 08:58:27 AM	8 Rd		Gordon's Pizza	Food/Water Deliv...		no		NYJBN4292			Details
May-08-2023 08:57:58 AM	Way	Lyft		Transportation		no		NTHBV9936			Details
May-08-2023 08:57:44 AM	8 Rd	Amazon		"123"		no		NYAVC5721			Details
May-08-2023 08:57:30 AM	8 Rd	DoorDash		Food/Water Deliv...		no		NYLYH8245			Details

- Once all visitor information is entered, click the **Check In** button on the list's right side. The visitor will automatically be checked in.

	Resident Unit	Vendor	Name	Type	Bani	
New Vendor →						Check In

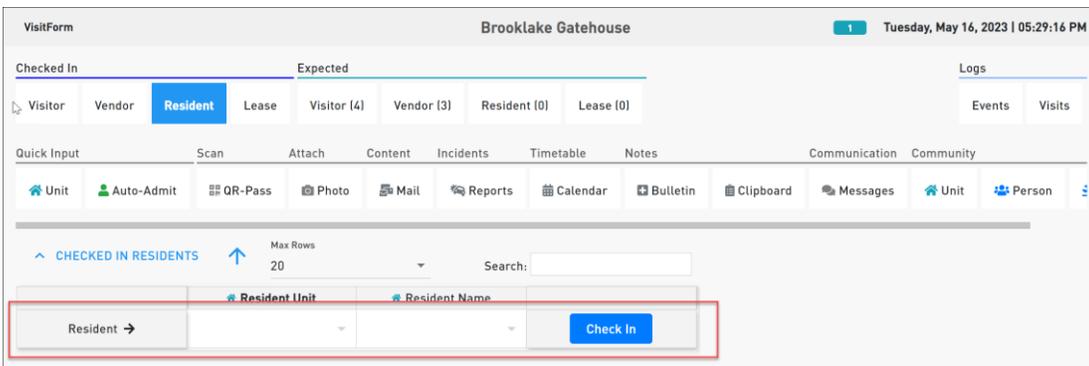
Checking in an Unexpected Resident

- Click the Visitor type – **Resident** - from the **Checked In** menu options.



The screenshot shows the VisitForm interface for Brooklake Gatehouse. The 'Checked In' menu is open, and 'Resident' is selected. Below the menu, there is a table for 'CHECKED IN RESIDENTS' with columns for 'Resident Unit' and 'Resident Name', and a 'Check In' button.

- To check in an unexpected vendor, begin by entering the Residential Unit and the Resident Name in the top row of the list. This row is exclusively used to enter new, unexpected visitor information.



The screenshot shows the VisitForm interface for Brooklake Gatehouse. The 'Checked In' menu is open, and 'Resident' is selected. Below the menu, there is a table for 'CHECKED IN RESIDENTS' with columns for 'Resident Unit' and 'Resident Name', and a 'Check In' button.

Double-click in any column to open a drop-down selection list.

	Init	Vendor	Name	Type	Banned	Require Call	Representative	Plate Number	Notification Type	C	
New Vendor →	-	-	-	-	-	-	-	-	-	-	Check In
May-08-2023 08:59:59 AM	8 Rd	UPS		"123"		no		NYTRV9519			Details
May-08-2023 08:59:35 AM	8 Dr	DoorDash		Food/Water Deliv...		no		NYKTY4827			Details
May-08-2023 08:58:44 AM	8 Dr	Amazon		"123"		no		NYART5431			Details
May-08-2023 08:58:27 AM	8 Rd		Gordon's Pizza	Food/Water Deliv...		no		NYJBN4292			Details
May-08-2023 08:57:58 AM	Way	Lyft		Transportation		no		NTHBV9936			Details
May-08-2023 08:57:44 AM	8 Rd	Amazon		"123"		no		NYAVC5721			Details
May-08-2023 08:57:30 AM	8 Rd	DoorDash		Food/Water Deliv...		no		NYLYH8245			Details

3. Click the **Check In** button on the list's right side. The visitor will automatically be checked in.

	Resident Unit	Vendor	Name	Type	Bani	
New Vendor →						 Check In

Details

Once a Visitor or Vendor are checked in, a QR-Pass can be created that the visitor can to come and go between the time they check in and their expected departure.

Click **Details** to create the pass.

Details

CREATE QR-PASS 

Edit Arrival and Departure time by clicking the blue texts below Arrival and Departure.
After creating a pass for the visit, the pass must be recreated in order to change arrival and departure date.
To edit visitor data, recreate the visit.

NAME	DUE
RESIDENT UNIT	RESIDENT NAME
10 Valley View Dr	Sarah Hawkins
EXPECTED ARRIVAL	EXPECTED DEPARTURE
May-16-2023 05:34 PM	May-17-2023 12:00 PM

Visit Notes

Note only visible to staff

REMOVE VISIT
CLOSE

Make sure there is an Expected Arrival and Departure date/time. Then click **Create QR Pass**.

Once the QR Pass is created, it can be downloaded and emailed, printed, or shared as a link to the visitor.

Details

DOWNLOAD QR-PASS 
PRINT QR-PASS 
SEND QR-LINK 

NAME	DUE
RESIDENT UNIT	RESIDENT NAME
10 Valley View Dr	Sarah Hawkins
EXPECTED ARRIVAL	EXPECTED DEPARTURE
May-16-2023 05:34 PM	May-17-2023 12:00 PM

Visit Notes

Note only visible to staff

REMOVE VISIT
REMOVE PASS
CLOSE

Once the pass information is retrieved, click **Close**.

Expected (Visitor, Vendor, Resident)

When a resident is aware that a visitor will be coming to the property, they may choose to pre-register them, adding them using the Resident Portal. Attendants can also be requested to pre-register a guest as an expected visitor. Once a pre-registered visitor arrives at the property, Attendants can quickly check them in.

Use the menu options under the Expected section to check in an expected visitor.

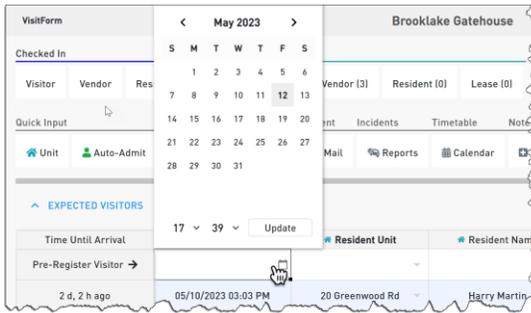
How to Pre-Register a Visitor

To add a visitor to the Pre-Registered list

1. Click the Visitor type (Visitor, Vendor, Resident) from the **Checked In** menu options.
2. Double-click in the Expected Arrival Date column at the top of the list. The top row of the list is reserved to pre-register visitors.

Time Until Arrival	Expected Arrival	Resident Unit	Resident Name	Resident Phone Number	
Pre-Register Visitor →	05/12/2023 05:32 PM				Register
2 d, 2 h ago	05/10/2023 03:03 PM	20 Greenwood Rd	Harry Martin		Check In Details
2 d, 2 h ago	05/10/2023 03:15 PM	30 Pine Valley Way	Hilda Cortez		Check In Details

A popup calendar will display the Expected Arrival date/time selection.



Select a date on the calendar, enter a time, then click **Update**.

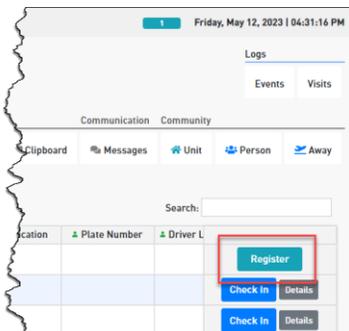
- Now enter the rest of the visitor information in the columns: Resident Unit, Resident Name, Resident Phone Number, Visitor Name, Identification information, License Plate number, and Driver's License number. Comments can be added to the Comments column. Select from Automatic, Call, Email, or Text in the Notification Type column.

Note: The Banned column requires no entry. If the named visitor has been previously banned from the property, the column will show Banned, otherwise, Allow.

The list can be scrolled left and right to view all columns using the scroll bar at the bottom of the list.

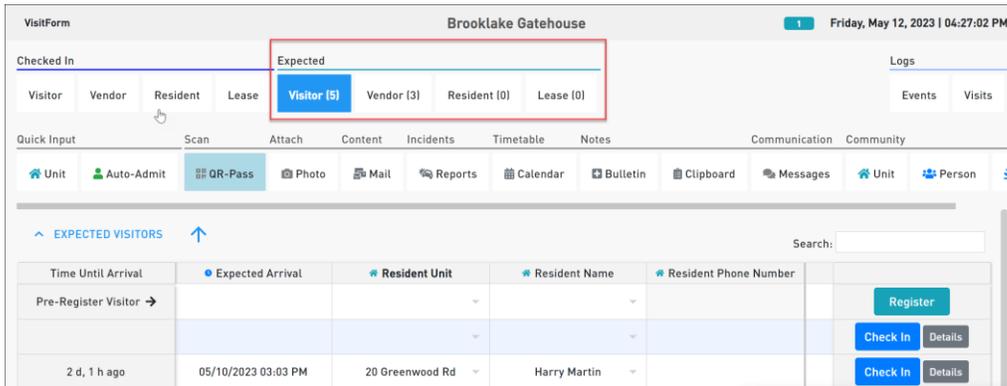
Time Until Arrival	Resident Unit	Resident Name	Resident Phone Number	Name	Banned	Identification	Plate Number	Driver License #	Comments	
Pre-Register Visitor →										Register
2 d, 2 h ago	20 Greenwood Rd	Harry Martin		Doreen Henderson	Allow					Check In Details
2 d, 2 h ago	30 Pine Valley Way	Hilda Cortez		Maria						Check In Details
1 d, 2 h ago	10 Valley View Dr	Sarah Hawkins		Paul						Check In Details
2 d, 21 h	50 Greenwood Rd	Martin Frazier		William						Check In Details

- After all visitor information has been entered, click **Register**.

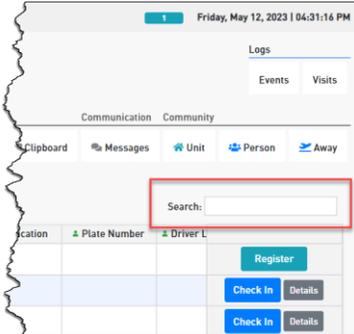


How to check in an Expected Visitor

1. Click the Expected Visitor type (Visitor, Vendor, Resident) from the **Expected** menu options.



2. Find the visitor's name by scrolling through the list or entering it into the Search box. The list will automatically filter based on the entered characters.



3. Once the pre-registered visitor entry is found, click the **Check In** button on the list's right side. The visitor will automatically be checked in.



4. If the visitor is not found in the list, they can be added on the fly by selecting a Check In menu option.

Scan QR-Pass

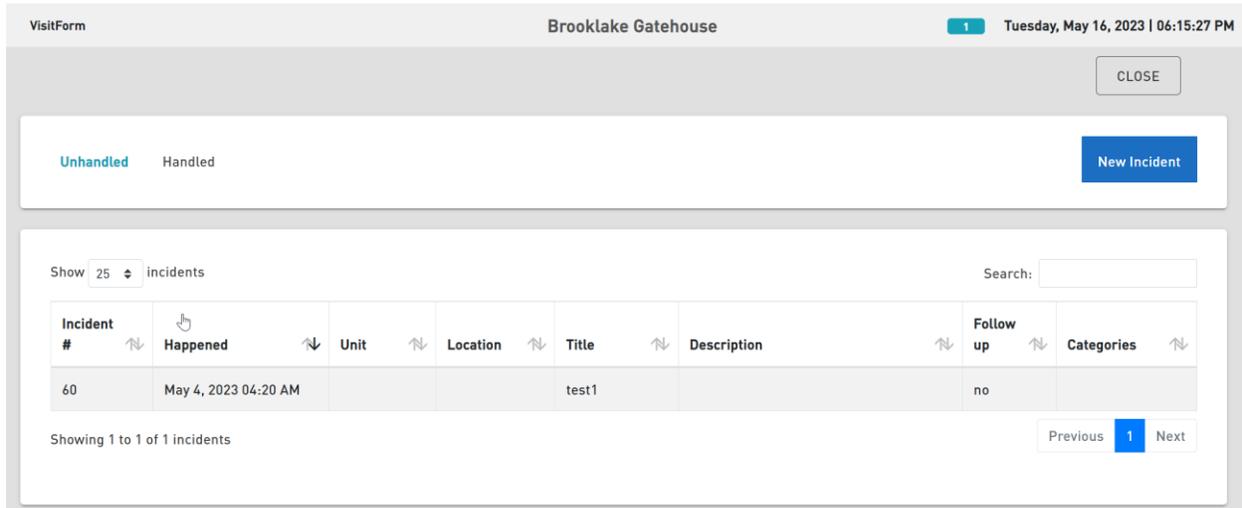
When a visitor arrives and shows a QR Pass, click on the **Scan > QR Pass** menu option. Attendants can use a Smartphone, Tablet, or Handheld Scanner Gun to scan the QR code.

When the scan is complete, a popup will appear with the visitor's details (such as name, unit, and if they are allowed on the property or not). Then the Attendant can click **Check In** to allow them entry.

Incidents

Reports

Click **Incidents > Reports** to review the current incidents when starting a shift. This is also where new incidents are reported. When reviewing the list of recent incidents, click on any column header to sort the list in ascending order by that column. Click the column header again to sort it in descending order.



Click **New Incident** to report a new issue.

Click **Close** to close the Incident page and return to the previous page.

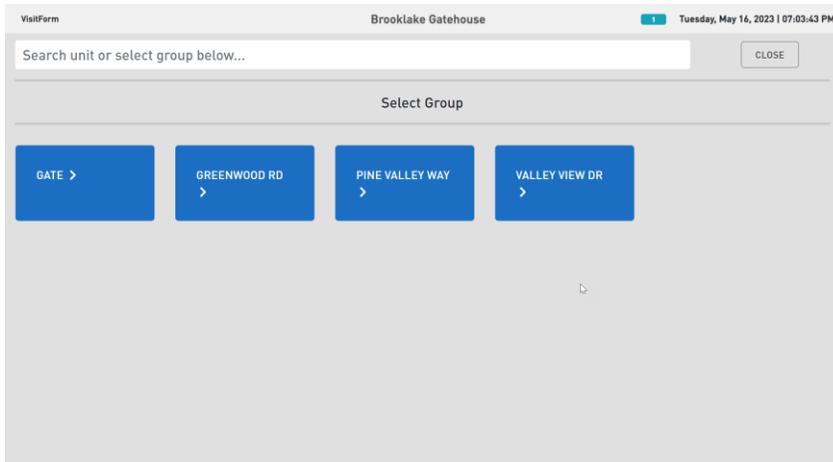
Community

Unit

Click **Community > Unit** to locate a resident using a simple point and click interface, which is easy to use with a device like a tablet. This interface allows you to click and go without doing much typing on a keyboard. The result of the selections made on this page is a resident's details, similar to the Person menu option.

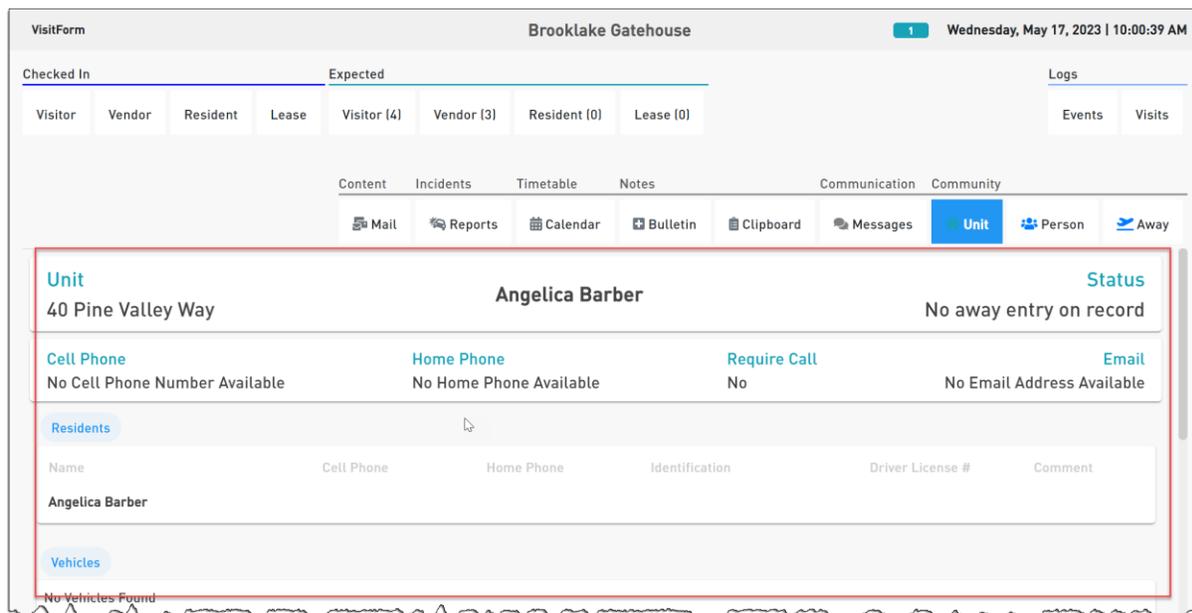
First select the Group and Group number the resident lives on. The Group and Group number is an easy way to categorize addresses in the community, usually breaking them down by subdivision and or street names, or maybe even by groups of house numbers. Communities may group their units differently based on the size and needs of the area.

As an example, let's say there is a large community with 2 gate locations. Within this community there are several subdivisions, and each subdivision has many streets. They decide to set up groups based on subdivision name, then street name. So a house on 20 Pine Valley Drive will fall under the Group of Pine Estates and Group Number Pine Valley. Once these groups are selected, all Units on Pine Valley Drive will display with the Unit number.



You will select the Group first, then the Group Number, and then the Unit.

Once the Unit is selected, the Resident Details page displays.



Note the Status and Phone numbers as well as the Require Call field. Require Call will let you know if you MUST call them to verify the visitor.

Click **Close** to close the page and return to the previous page.

Person

Click **Community > Person** to look up a resident. The list displays all people/residents in the community, and details are available, which can be used to determine their preferred way to contact or if they are available to accept visitors (residents can mark themselves away if they are away from the residence).

Note: No data can be added from this page.

VisitForm Brooklake Gatehouse 1 Tuesday, May 16, 2023 | 07:05:07 PM

CLOSE

RESIDENTS

Search...

REFRESH

Name ↑	Unit	Cell Phone	Home Phone	Email	Address	Plate	Driver License #	Identification	Comment
Angelica Barber	40 Pine Valley Way								
Claire Fisher	50 Valley View Dr								
Earl Fitzgerald	40 Valley View Dr								
Emma Smith	30 Greenwood Rd								
Gate	1 Brooklake								
Harry Martin	20 Greenwood Rd								
Hilda Cortez	30 Pine Valley Way								
Jack Ronalds	20 Pine Valley Way								
Martin	2 Brooklake								
Martin Frazier	50 Greenwood Rd								
Miranda Houston	40 Greenwood Rd								
Nichole Becker	20 Valley View Dr								
Owen Woods	30 Valley View Dr								
Samantha Thompson	10 Pine Valley Way								
Sarah Hawkins	10 Valley View Dr								
Suzanne Davis	60 Greenwood Rd								

Rows per page: 16 1-16 of 17

To locate resident information, enter the resident's **Name** or **Unit** into the **Search** box above the list. The list is automatically filtered to show matching residents as the information is entered. To clear the search value, click the **X**. Clicking **Refresh** will update the list with the latest information (in case something was updated after the list was opened).

VisitForm Brooklake Gatehouse 1 Wednesday, May 17, 2023 | 09:32:42 AM

CLOSE

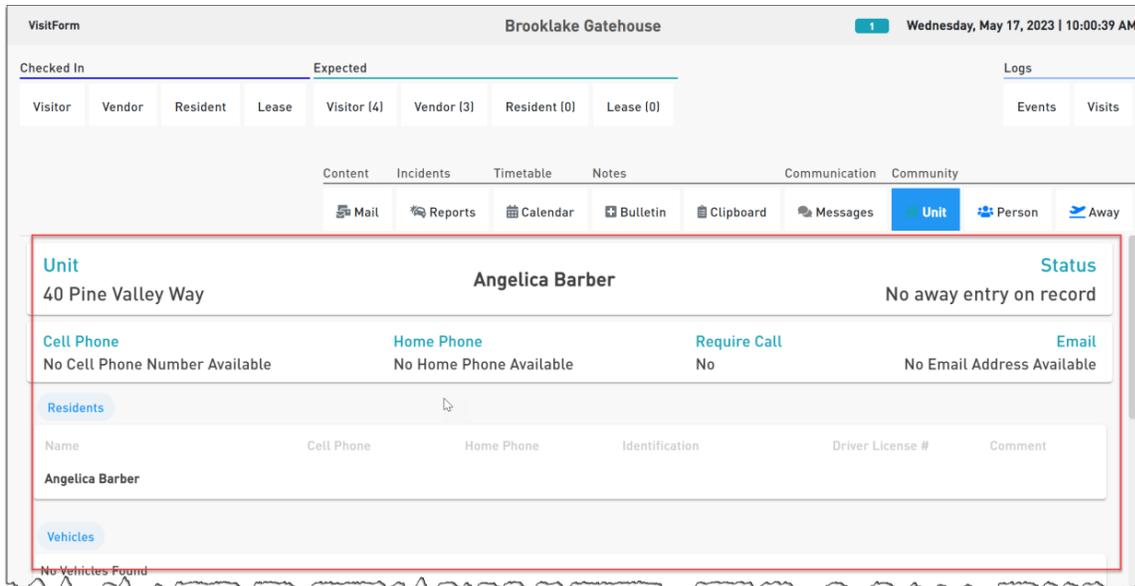
RESIDENTS

pin X REFRESH

Name ↑	Unit	Cell Phone	Home Phone	Email	Address	Plate	Driver License #	Identification	Comment
Angelica Barber	40 Pine Valley Way								
Hilda Cortez	30 Pine Valley Way								
Jack Ronalds	20 Pine Valley Way								
Samantha Thompson	10 Pine Valley Way								
Tom Washington	50 Pine Valley Way								

Rows per page: 16 1-5 of 5

To see the Resident details, click on the **Unit**.



Unit: Angelica Barber
 40 Pine Valley Way
 Status: No away entry on record
 Cell Phone: No Cell Phone Number Available
 Home Phone: No Home Phone Available
 Require Call: No
 Email: No Email Address Available

Name	Cell Phone	Home Phone	Identification	Driver License #	Comment
Angelica Barber					

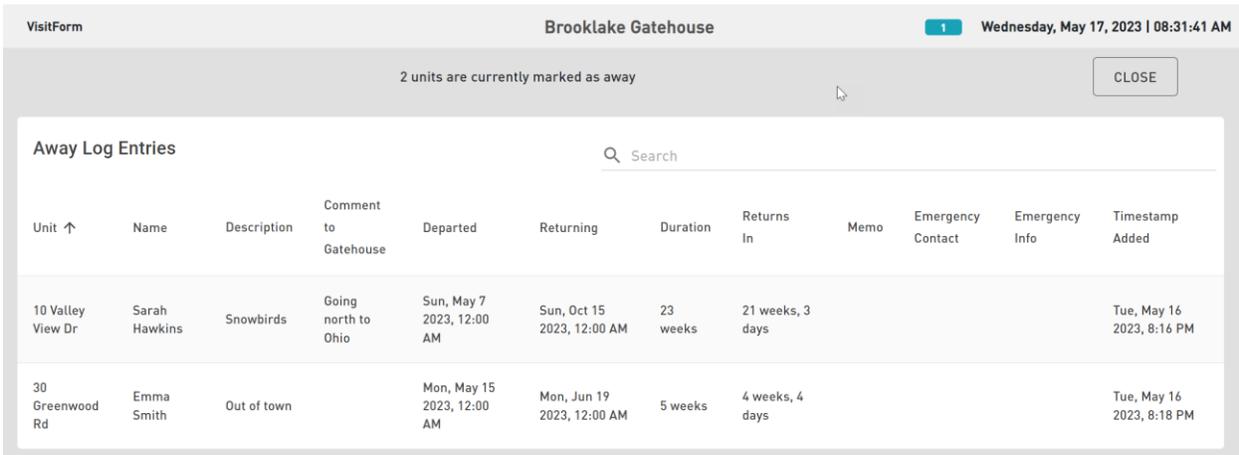
Vehicles: No Vehicles Found

Note the Status and Phone numbers as well as the Require Call field. Require Call will let you know if you MUST call them to verify the visitor.

Click **Close** to close the page and return to the previous page.

Away

Click **Community > Away** to easily check the status of a resident—only residents who have marked themselves as Away will show on this list. Residents can mark themselves as Away via the VisitForm Resident Portal.



2 units are currently marked as away

Search

Unit ↑	Name	Description	Comment to Gatehouse	Departed	Returning	Duration	Returns In	Memo	Emergency Contact	Emergency Info	Timestamp Added
10 Valley View Dr	Sarah Hawkins	Snowbirds	Going north to Ohio	Sun, May 7 2023, 12:00 AM	Sun, Oct 15 2023, 12:00 AM	23 weeks	21 weeks, 3 days				Tue, May 16 2023, 8:16 PM
30 Greenwood Rd	Emma Smith	Out of town		Mon, May 15 2023, 12:00 AM	Mon, Jun 19 2023, 12:00 AM	5 weeks	4 weeks, 4 days				Tue, May 16 2023, 8:18 PM

To see if a resident is on this list, enter the resident's **Name** or **Unit** into the **Search** box above the list. The list is automatically filtered to show matching residents as the information is entered. To clear the search value, click the **X**. Clicking **Refresh** will update the list with the latest information (in case something was updated after the list was opened). If the person you are looking for does not show in the list, they are not marked as Away.

Click **Close** to close the page and return to the previous page.



If you have questions about the VisitForm software or need assistance, please send an email to info@visitform.com