

INTRODUCTION

ABOUT VISITFORM

VisitForm is an advanced visitor management Software-as-a-Service (SaaS) designed to manage visitor traffic and resident information simply and easily. VisitForm is a robust and fully customizable system. It is a powerful communication tool for staff and residents alike.

VisitForm is cloud-based so it can be used on any device from any location. Updates and changes to data take place in real time, so information is always up to date. There is no longer needed to keep paper logs as *VisitForm* stores this information in the cloud. Logs can be downloaded and shared with others by choosing Reports and entering the specific criteria for the reports.

Thank you for using VisitForm!

CONTENTS

Getting started	2
Administrator Screen	2
Setup	2
Operation	5
People	5
Vendors (ultimate feature only)	5
Staff	6
Visit log, Vendor Log, Shift Log	6
Reports	6
Analytics	6
Manage	6
Help	6
Account	6
Attendant and check in screen	7
Attendent screen	8
Recommended system	9
Contact and support	9

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GETTING STARTED

There are two types of screens in VisitForm:

Administrator

Attendant / Check in Screen

ADMINISTRATOR SCREEN

The Administrator screen is used for setting up the location and is accessed by logging into VisitForm.

After signing up an account the username is saved locally in your browser history. So, you will not need to log in each time. However, in the event of the system being logged out you would need to sign back in. If that happens, go to the website <https://visitform.com> and click on “Login” at the upper right-hand side of the page and login.

Once you are logged into the Administrator screen you will see a menu on the left side of the screen.

SETUP

The first thing you want to do is to setup your location. To do so, click on Setup on the menu on the left side.

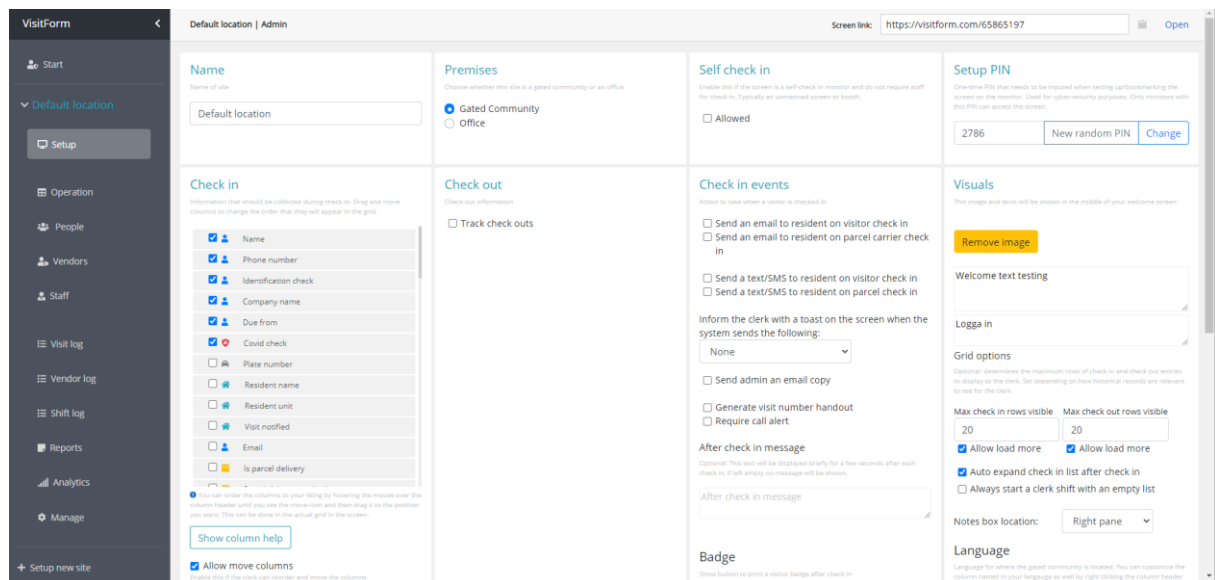


Figure 1.1 Overview of the Setup page on the administrator section

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- Choose a **Name** for your site. By default, “Default location” is already in the field, simple replace it with whatever you want and then click anywhere on the screen. Most languages are supported. To see the change everywhere, you need to reload the page by either clicking on reload on your browser or F5 on the keyboard.
- Choose which **Premises** your location is, if your site is a Gated Community or an Office by clicking on the small circle next to it. You can see that options in other fields are different depending on this choice.
- Decide if visitors can **Self Check in** or if it is managed by attendants. Again, different options appear depending on this choice.
- **Setup PIN** is used to give an extra layer of security, the first time you setup the location click on “New Random PIN” this gives a new random generated one-time PIN that needs to be inputted when setting up/bookmarking the screen on the monitor. Used for cyber-security purposes. Only monitors with this PIN can access the screen.
- Next go to **Check in** and click on the boxes which information you want to collect from the visitors. It is possible to click and hold an object and then move it for them to appear in the way you want on Check in screen.
 - You can create your own fields by clicking the box: Allow rename column names. Then while in the Check in screen right click on the column you want to rename and type in the information you want to collect, then press enter.
- If you want to be able to **Check out** visitors. Click the box next to “Track check outs”
- In the **Check in events** field, you can choose different action that happens when a visitor checks in.
 - Click on the boxes next to the action you want to happen. For the “Send an email to host” or “Send a text/SMS to host information about the host need to be registered in the People tab. For more information how to register people/host/residents see the People guide in this manual.
 - The function “Send a text/SMS” to host is **only** available for customers using the premium version of VisitForm.
 - If you want a confirmation message after a check in and/or check out. Type in a text in the “After check in message” and/or the “After check out message” field. By default, this is empty, and no confirmation is enabled. The same thing applies to check out.
 - Here you can also add the “Print badge bottom” this enables the feature in the Check in screen to print out information about the most recent checked in visitor
- The **Visual** enables to personalize the Check in screen. Here you can:
 - Add an image, start by clicking on “Browse” then choose the picture you want to add then click “Set image”. This image will appear along your Welcome text.
 - Create and customize a “Welcome text” and “Caption text”. Just click on the area and start typing what you want to appear.

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- Change how many rows are visible for the attendant and change if you want for the next shift to start with an empty list of visitors.
- Change the Language and time zone.
- **Vendor tracking** this creates another page in the Check in screen with the so Vendors and Visitors can be tracked on different pages.
 - Note that this feature is only available fully in the ultimate edition.
- With the **Auto-Admit** function enabled it is possible to use a list registered in the People tab for both auto admission but also banned to a certain residence. This can make the site easier to handle for the attendants knowing prior who to let in and who not.
 - Make sure “Auto-Admit Name” and “Banned” is checked in in the **Check in** field for this function to properly work.
- You can change the **Attendant term** in the Check in screen by simple change it to what is the most fitting for your site.
- **Date format** is possible to change in the check in screen if you prefer DD/MM/YY or MM/DD/YY just click on the format and change it.
- With the **Resident window** function, you can make it possible for the attendant to view and edit the list. If enabled a blue text saying Resident in the button left corner is visible for the attendant in the Check in screen. This can make it easier for the attendant. By default, this is hidden.
- You can **Color even rows** in the Check in screen, simple click on the box and a small color appears next to it. Click on this color to change, a popup appears where you can pick any color you like then click ok. Keep in mind that the text color is always black.
- **Announcements order** is possible to change to fit your preferences, you can choose between chronologically or severity. More details about announcements are described in the operation section in this guide.

When everything is setup the way you like. Go to the top right corner of the page and notice there is a **Screen link** which should look something like <https://visitform.com/64228764> to open the link you can also click on **Open** next to it. If it is the first time opening the Check in screen, you will be prompted to enter the PIN we created earlier in this guide.

This will take you to the **Attendant / Check in Screen**

Please keep in mind that all the options can at any time be changed by the administrator. Do not be afraid to try different setups to find the solution that suits your location the best!

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OPERATION

The Operation Menu is used to enter ongoing information about the community. It allows communication between the administrator and attendants. This screen allows you to enter both announcements and notes. . Once an announcement is set up on the *Operations* screen, it will also appear immediately on the top of the *Check in Screen*.

- There are different categories of announcements, and you should choose the category that best applies to a given situation based on your location.
 - To send a new announcement type in the field *announcement text*, fill in for how long and the severity then click Send announcement.
- Announcements can be cancelled by administrator by clicking on the [Cancel](#) button.
- Announcements can ONLY be entered or edited from the Operation tab, not on the attendants screen.
- Notepad is for general information and can be used in any way that suits your location. Examples of usage could be: “Payroll is due tomorrow”, or “Tony is on vacation from July 8 - July 12”. The notes will appear on the Check In screen. Unlike Announcements notes do not have a duration and can be entered, edited, and deleted by both administrator and attendant. Click [Save Notes](#) each time a note is entered or edited.

PEOPLE

- With the People menu you can add Unit / Residents in the grid. Simple click on the field you want to edit. Keep in mind to click [Save](#) found in the top right corner to save your changes. Before seeing the changes and going to the Away log or Auto-admit you will need to refresh the page by clicking refresh on your browser or F5 on the keyboard
 - By default, 100 rows are available for all fields. If more rows are needed it is possible to add more by right click in the grid click “*Insert a new row after*” then enter the information you want and then as before click [Save](#).
 - If a row is added this way the row will vanish if Resident unit is left empty when refreshing the page.
- If Resident window is enabled in the Setup page attendants can read and edit the people list. If it’s not enabled only the administrator can.

VENDORS (ultimate feature only)

- With the Vendors menu you can add Vendors in the grid. Simple place your cursor over the field you want to edit. Keep in mind to click [Save](#) found in the top right corner to save your changes. Before going to the Away log or Auto-admit you will need to refresh the page by clicking refresh on your browser or F5 on the keyboard.

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STAFF

- In the Staff menu it is possible for the administrator to add attendants that manage the Check in screen.
- Only the administrator can read and edit the staff list.

VISIT LOG, VENDOR LOG, SHIFT LOG

- Keep logs on the recent event
 - It is possible to choose a specific time for when you want to see the log.

REPORTS

- Reports can all be customized and can be exported to Excel and or PDF. This feature can be used when trying to track a particular event.

ANALYTICS

- Shows which hours the visitors have been checked in to be able to see statistics in easy and visual way.

MANAGE

- It is possible to remove a site. Just go to manage and click on **Remove**. A confirmation box will appear giving the option to cancel or proceed with the removal. Note that the removal is final and there is not possible to restore a deleted site.

HELP

- See this section for more details about the system and features.

ACCOUNT

- Here you can change the password for your login.
 - Enter your old password then the new and then click reset password.
- It is not possible to change the mail associated with the account.

Many common short commands such as Ctrl + C and Ctrl + V works excellent when working in the various grid pages.

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ATTENDANT AND CHECK IN SCREEN

The Attendant screen or the *Check In* screen is where all incoming traffic to the premise will be logged. Depending on the choice we made prior in the manual regarding if the visitor can check in by themselves or handled by attendant different screen will appear.

Here we've setup that visitors can check in and checkout by themselves, there is then two options: **Check in** and **Check out** both leading to a new page where the visitor will be asked to fill in the grid.

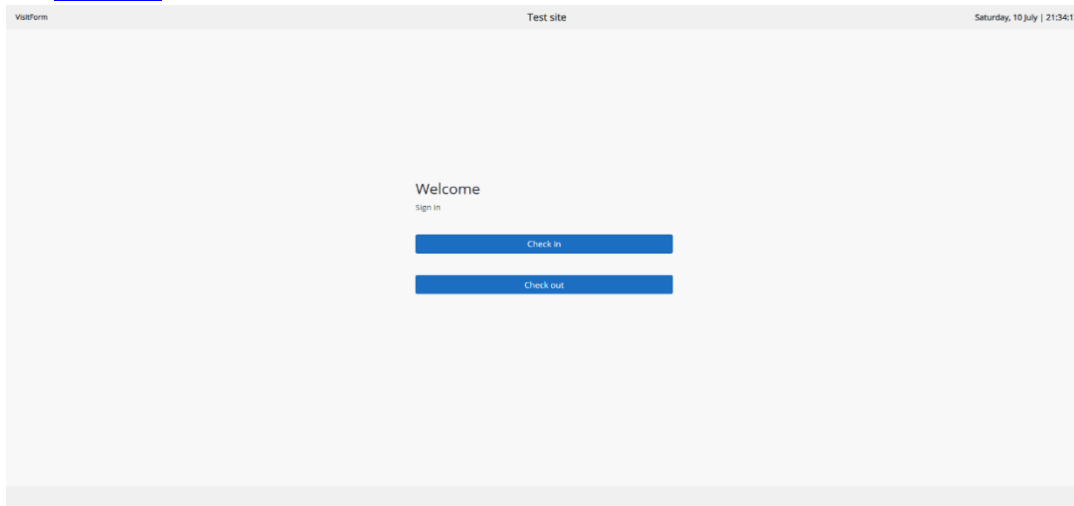


Figure 2.1 Check in screen allowing Self Check In

In this next example we have **not** allowed visitors to check by themselves. Instead, we've a sign in field. If attendants have been registered in the Staff section on the Administrator page, it's possible for the attendants to start writing their name on the field "Registered attendant get suggestions and then click on their name that appear. If there is no premade list of attendants it is also possible to write the name manual on the field below. Then click **Start Shift**. This will take you to the attendant screen.

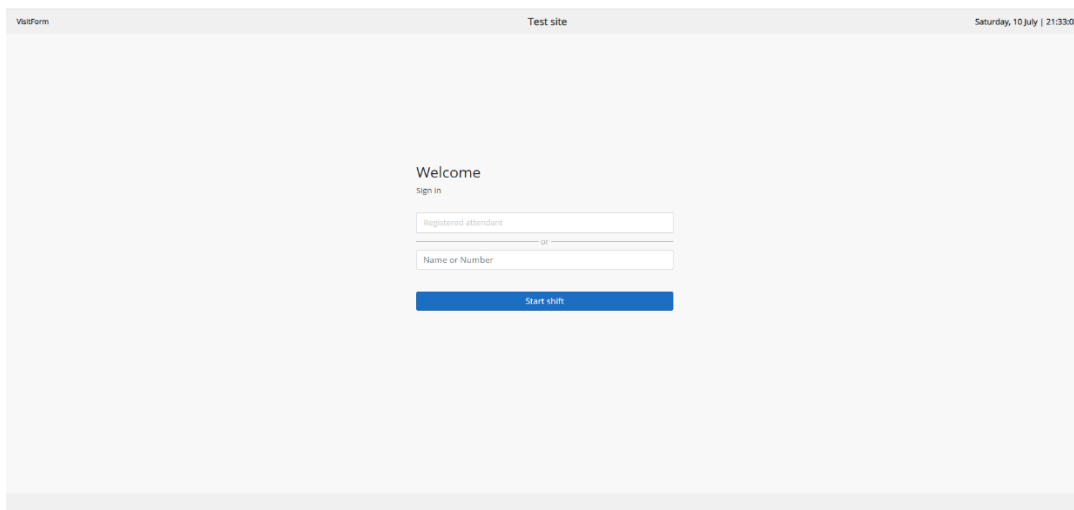


Figure 2.2 Check in screen not allowing Self Check In

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ATTENDANT SCREEN

The Attendant screen is split into three sections.

- Checked In
- Vendors Checked In
- Checked out (If enabled)

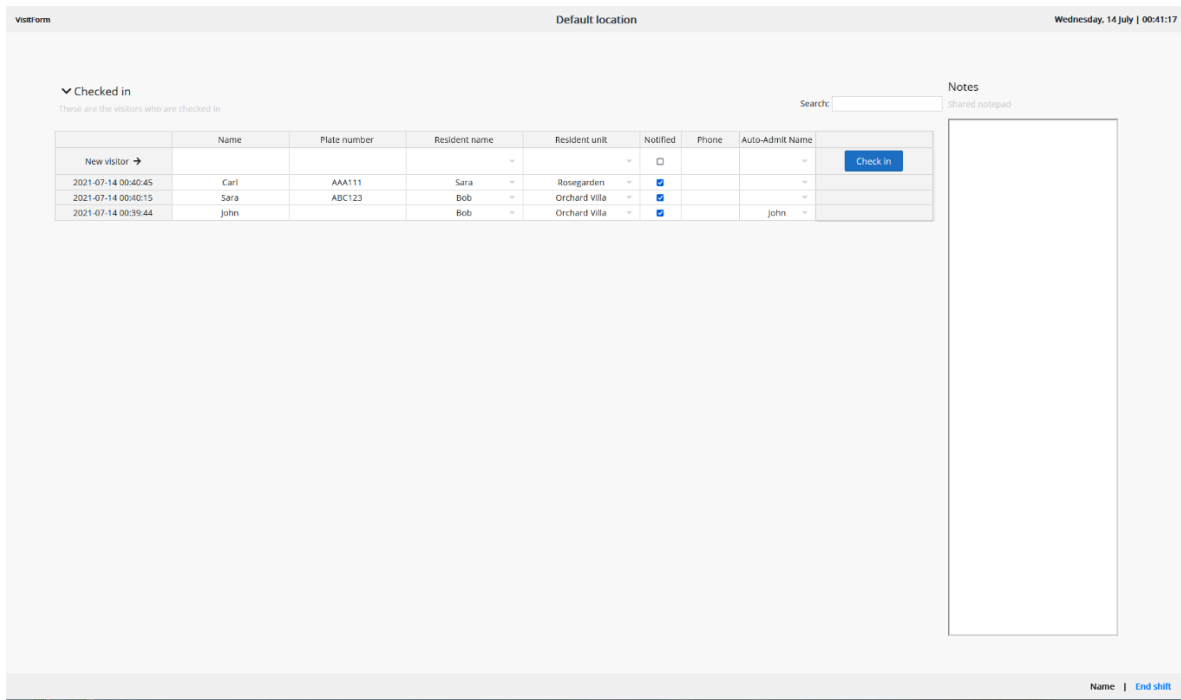


Figure 2.3 Attendant screen

Use the top, blank row next to “New Visitor” to enter a new visitor. After inputted all the information in the grid click **Check In** at the far right-hand side to log a visitor. If you DO NOT click the Check In button, the visitor will NOT be logged in. Notes are shared with the administrator, the difference here is that all notes are saved automatically when entering in the field and thus there is no Save bottom.

- Auto Admit Visitors
 - We can Auto Admit Visitors in the Check in Screen by setting up the People page and using **Auto-Admin name** and/or **Banned** in the Check in section. After you click on the Resident’s unit the column “Auto-Admit Name” will populate with the list of the preset names on the Auto Admit list for that Resident (or banned). From the drop-down menu, click on the person’s name to select them. Banned: The next column, “Banned” will indicate if a visitor is allowed or if they have been banned entry. This information will populate once you select a Resident. The word “Banned” will appear in red in the “Banned” column instead of the word “Allow”. A ban can be either permanent or temporary and will be noted as such in the “Status” column.

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- Vendors Checked In (Only fully available for ultimate edition)
 - The *Vendor Checked In* screen works the same way that the *Check In* screen does. However, there are a few additional columns that contain information critical to giving admittance to a vendor.
 - Use the top, blank row next to “New Vendor” to log in a vendor. Under the *Representative* Field, type in the individual’s name as well as their license plate number in the *Plate Number* field.
 - The “*Insurance Required*” column will let you know if insurance for a particular vendor is needed before granting admittance, and the “On File” check box will be checked. This information will be set up in the system by the Administrator and you should not edit this information.

- Ending a shift
 - At the end of a shift, click on **End Shift**. This will effectively log out the current attendant and the page will go back to the Check in screen for (figure 2.2)

RECOMMENDED SYSTEM

The system works on any device that support any modern web browser e.g., Microsoft Edge, Mozilla Firefox, Google Chrome and Apple Safari. However, for the menus to be presented correctly we recommend using minimum a monitor that is **10”** or larger. That means any tablet, computer screen (both laptop and stationery) is sufficient.

CONTACT AND SUPPORT

If you have any questions, feedback or suggestions please write us an email at info@visitform.com

Thanks again for using VisitForm!

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