

## Visitor Management User Manual

**A Visitor Management System is a completely connected SaaS solution that lets you manage your visitors and their data efficiently. It helps you to capture the visitors' photographs, save their details and deliver a superior visitor check-in experience. This option is an additional feature which is available only on cloud.**

The screenshot shows a web browser window with the URL `sohcm.com/SmartApp/`. The browser's address bar and tabs are visible, including Google, Addons Store, Skype, smartoffice website, sql link, SQL Server 2008 R2..., and https://sohcm.com/... - Smart Office Empl...

The main content area features the SmartOffice logo and the text "Time and Attendance Software". Below the logo is a login form with the following fields:

- CLOUD ACCOUNT NAME:
- USERNAME:
- PASSWORD:
- Show Password
- [Forgot Password](#)
- 

Below the login form is a "GOODBYE VERIFIED & SECURED" badge.

To the right of the login form, the text "Time & Attendance on Cloud+ ESS + Android Mobile App" is displayed. Below this text are two sections:

- Employee Panel**
  - Apply Outdoor
  - Apply Leave
  - Employee Leave Summary
  - Attendance Regularization
  - Swipe Details
  - Apply Comp Off
  - GPS Clock in/out
- Manager Panel**
  - Employee Attendance Details
  - Employee Swipe Details
  - Employee Outdoor Entries
  - Comp Off Approval / Decline
  - Leave Approval / Decline
  - Pending Approval /Decline
  - GPS track location

On the right side, there is a diagram showing a smartphone displaying the SmartOffice app interface. Three icons are connected to the phone by lines: "Android" (Android robot icon), "QR-Code" (QR code icon), and "Play Store" (Google Play Store icon).

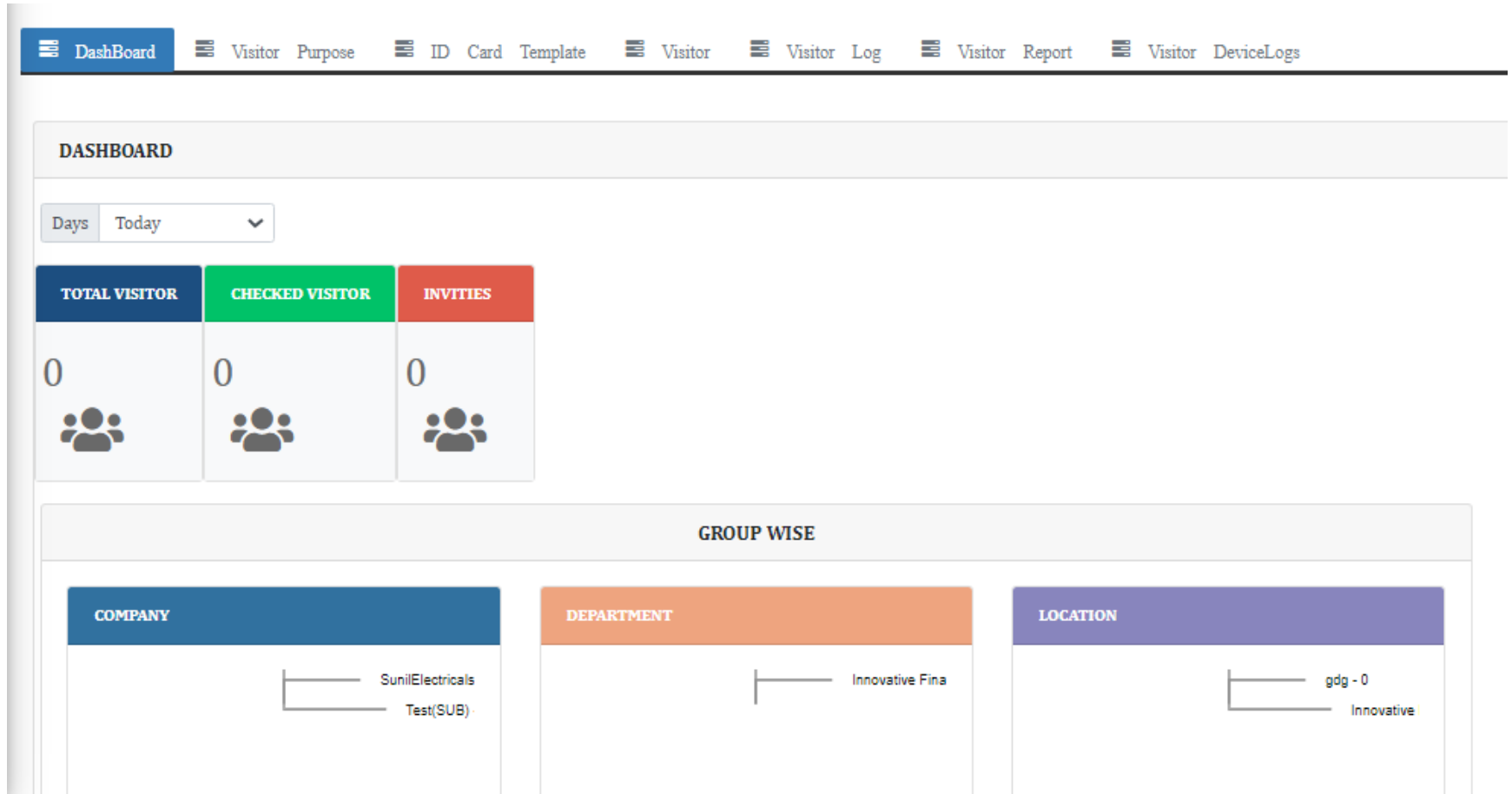
- First, we need to have cloud domain and then admin have to create a login password for receptionist who will maintain the details of visitors.
- To create the login credentials for the receptionist, go to the system user option create a system user login password & give permission for the visitor management as per below image.

The screenshot displays the 'SystemUser Details' form. The 'Login Name' field contains 'VSM'. The 'Login Password' field is masked with '\*\*\*'. The 'System Admin' checkbox is unchecked. Under 'Companies Allowed', 'Default' and 'Krisom' are selected. Under 'Departments Allowed', 'Default' is selected. Under 'Location Allowed', 'Default' and 'None' are selected. In the 'Permissions Allowed' list, 'VisitorManagement' is checked, while all other permissions are unchecked. The 'Compliance Free Login' checkbox is also unchecked. At the bottom, there are 'Save' and 'Close' buttons.

Field	Value
Login Name	VSM
Login Password	***
System Admin	<input type="checkbox"/>
Companies Allowed	Default, Krisom
Departments Allowed	Default
Location Allowed	Default, None
Permissions Allowed	<input type="checkbox"/> Daily Detail Report For Manager <input type="checkbox"/> Bulk Device User Deletion <input type="checkbox"/> Shift Group <input type="checkbox"/> Locations <input checked="" type="checkbox"/> VisitorManagement <input type="checkbox"/> AttendanceRegularize <input type="checkbox"/> ImportEmployeeLeaveBalance <input type="checkbox"/> Canteen Report
Compliance Free Login	<input type="checkbox"/>

### a) Dashboard

Daily wise you can see the total checked visitor and invites and total visitor. And you can also see group wise like department, company or location wise visitor list.



**b) Visitor Purpose-**

Here we need to mention the purpose of as shown in below image.

The screenshot shows a web application interface for managing visitor purposes. The navigation bar includes 'Dashboard', 'Visitor Purpose' (selected), 'ID Card Template', 'Visitor', 'Visitor Log', 'Visitor Report', and 'Visitor DeviceLogs'. The main content area is titled 'PURPOSE' and contains a table with the following data:

Purpose	Active		
Interview	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Meeting	true	<a href="#">Edit</a>	<a href="#">Delete</a>
others	true	<a href="#">Edit</a>	<a href="#">Delete</a>

c) ID Card template-

We have 4 ID card templates, admin have to select the template according to their choice and save it. So it will create visitors id card accordingly.

Dashboard Visitor Purpose **ID Card Template** Visitor Visitor Log Visitor Report Visitor DeviceLogs

Choose any template  
Selected : Template 3

**Template 1**  
Visitor  
Natural World  
9108084516  
Host : Ashutosh Gupta  
grajoshkumar523@gmail.com  
Meeting  
Template 1  
Select

**Template 2**  
Ashutosh Gupta (14)  
Senior Software Developer  
SMARTOFFICE PAYROLL AND BIOMETRICS SOLUTIONS PRIVATE LIMITED  
9108084516  
Host Sumit Jain  
Template 2  
Select

**Template 3**  
Ashutosh Gupta  
Smartoffice Payroll And Biometrics Solutions  
Private Limited  
9108084516  
Host Sumit Jain  
Template 3  
Select

**Template 4**  
Ashutosh Gupta  
Smartoffice Payroll And Biometrics  
Solutions Private Limited  
9108084516  
Sumit Jain  
Template 4  
Select

**d) Visitor –**

**Either receptionist can add visitor or office employee can add through SmartOffice mobile app, it will reflect in the visitor option.**



The screenshot displays the 'VISITOR' management interface. At the top, there is a navigation bar with the following menu items: Dashboard, Visitor Purpose, ID Card Template, Visitor (highlighted), Visitor Log, Visitor Report, and Visitor DeviceLogs. Below the navigation bar, the title 'VISITOR' is centered. A '+ Add Visitor' button is located in the top left of the table area. The table has the following columns: Visitor Name, Company Name, Mobile Number, Email, and two columns for actions (Edit and Delete). The table contains the following data rows:

Visitor Name	Company Name	Mobile Number	Email		
test	test	8095444694	sumayyamudhol176@gmail.com	Edit	Delete
fgd	rff	56888	fgf	Edit	Delete
fgd		8884402445	sumayyamudhol176@gmail.com	Edit	Delete
shafeen	deafult	8884402420	roi@smartoffice365.in	Edit	Delete
Rakesh	Construction	8904912061	po2442994@gmail.com	Edit	Delete
1	1	1525252441	south@smartofficepayroll.com	Edit	Delete
...	...	...	...	Edit	Delete

At the bottom of the table, there is a pagination bar with navigation arrows, a page number '1', a dropdown menu set to '20', and the text 'items per page'. On the far right of the pagination bar, it says '1 - 20 of 25 items'.

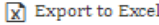


**e) Visitor Log-**

- a) Visitor photo will be displayed here for verification.
- b) Visitor Logs will be displayed with visitor ID card and his/her ID proof (Company ID card).
- c) If host invites then invitation code will be displayed otherwise it will be blank.
- d) Visitor name and his check-in and check-out date and time will be visible.
- e) Emp code and Emp name- are the host details who invited the visitor.
- f) CheckOut- If visitor didn't check out for any reason then admin can checkout manually.
- g) Add Visitor Log & Invite Visitor – This option is used if Admin needs to add the details of visitor.

Visitor Photo	Visitor ID Card	Visitor ID Proof	Invitation Code	Visitor Name	Mobile	Emp Code	Emp Name	Check In	Check Out	
	<a href="#">VisitingCard_20220713233129.jpg</a>	<a href="#">FileUpload_6020220713232932.jpg</a>	57839	test	8884402420	47	shafeen	13-Jul-2022 23:31	31-Aug-1900 23:51	<a href="#">Checkout</a>
	<a href="#">VisitingCard_20220713130324.jpg</a>	<a href="#">FileUpload_17120220713130142.jpg</a>	95116	maaz	8618263830	47	shafeen	13-Jul-2022 13:03	13-Jul-2022 13:03	<a href="#">Checkout</a>

**f) Visitor Report-**

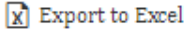

In visitor report we can see the visitor name with photo and whom he /she came to meet in office and how many times visitor came to visit in a month. And here we can see the 1st check in and latest check-in in the month.

VISITOR Report								
Month		Year		2022				
Jul								
Visitor Report		Employee Report						
 Export to Excel								
	Visitor Name	Mobile	Emp Code	Employee Name	visitor Came to meet no of time	First Checkin	Latest Checkin	
	test	8884402420	47	shafeen	1	13-Jul-2022 23:31	13-Jul-2022 23:31	
	maaz	8618263830	47	shafeen	1	13-Jul-2022 13:03	13-Jul-2022 13:03	



**g) Employee report-**

Here we can view the number of visitor came to meet the host. and we can view the 1st visitor check-in and latest check-in date time.

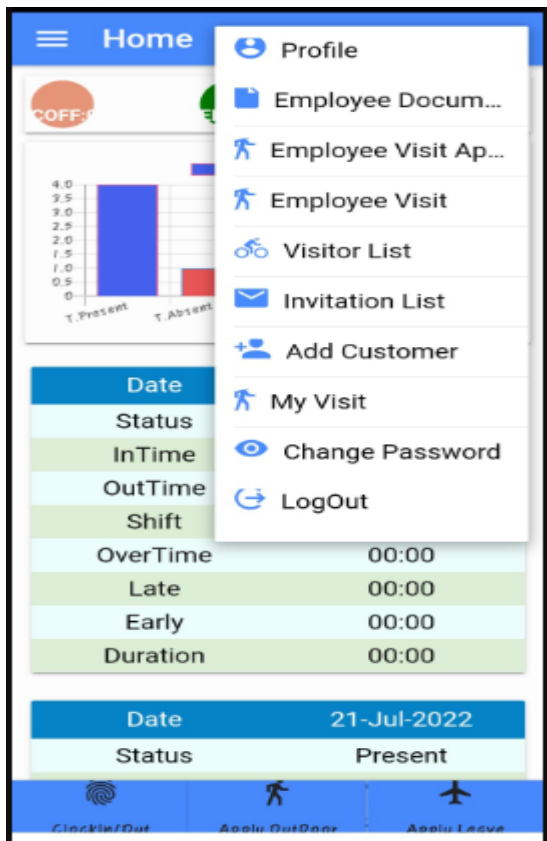
VISITOR Report						
Month	Year 2022					
Jul						
Visitor Report	Employee Report					
						
	Emp Code	Employee Name	No Of visitor Came to meet	First Checkin	Latest Checkin	
	47	shafeen	3	13-Jul-2022 13:03	14-Jul-2022 11:48	

## ESS- Employees Self services

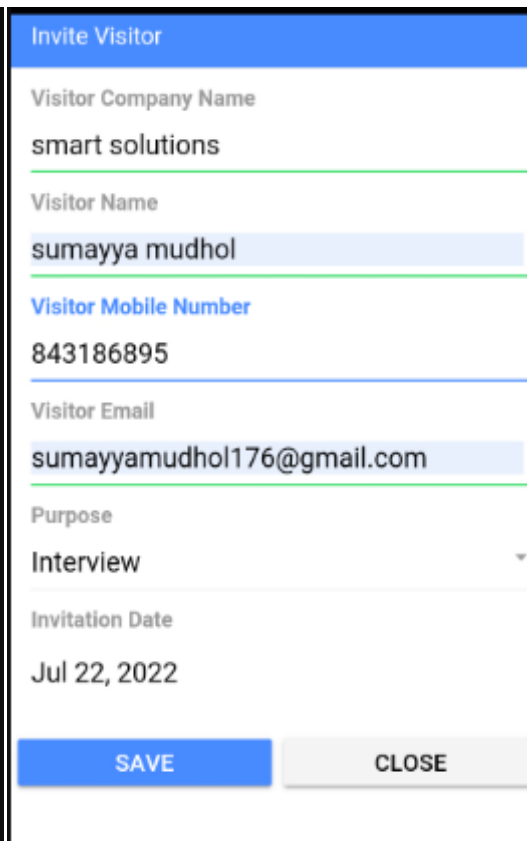
### How Host invites visitor?

Host must have smartoffice365 mobile app which is available in playstore (<https://play.google.com/store/apps/details?id=com.Smartoffice.SmartOffice365>). In app they have to click on invitation list and add have to add the visitor details like Name, Company and etc (as shown in image b). If visitor has come before no need of adding the details again just host have to mention the visitor mobile number, data will be auto fetched (as per image c).

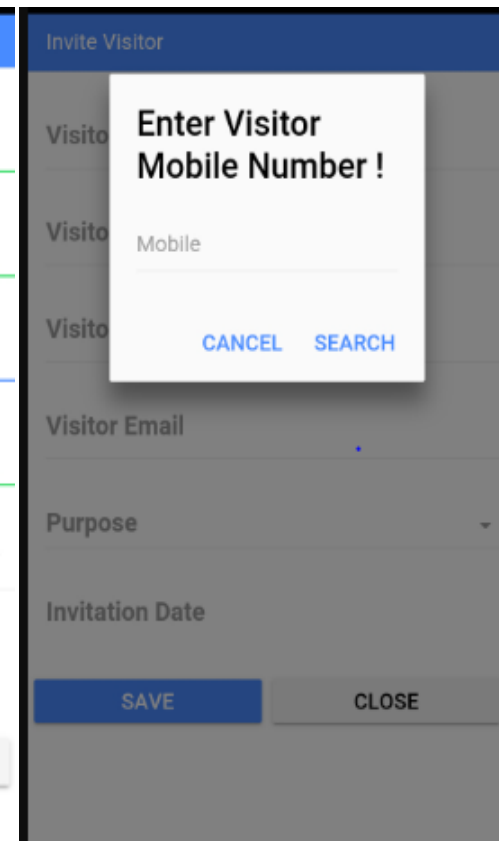
a)



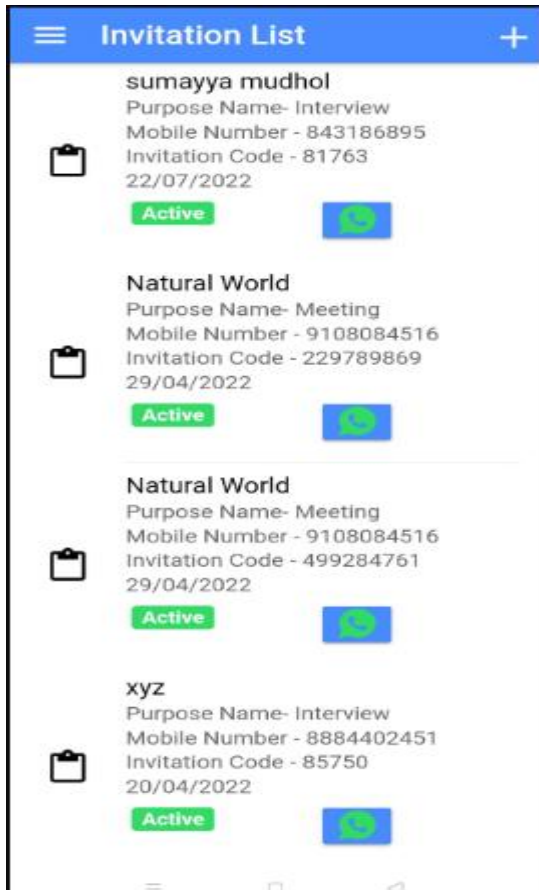
b)



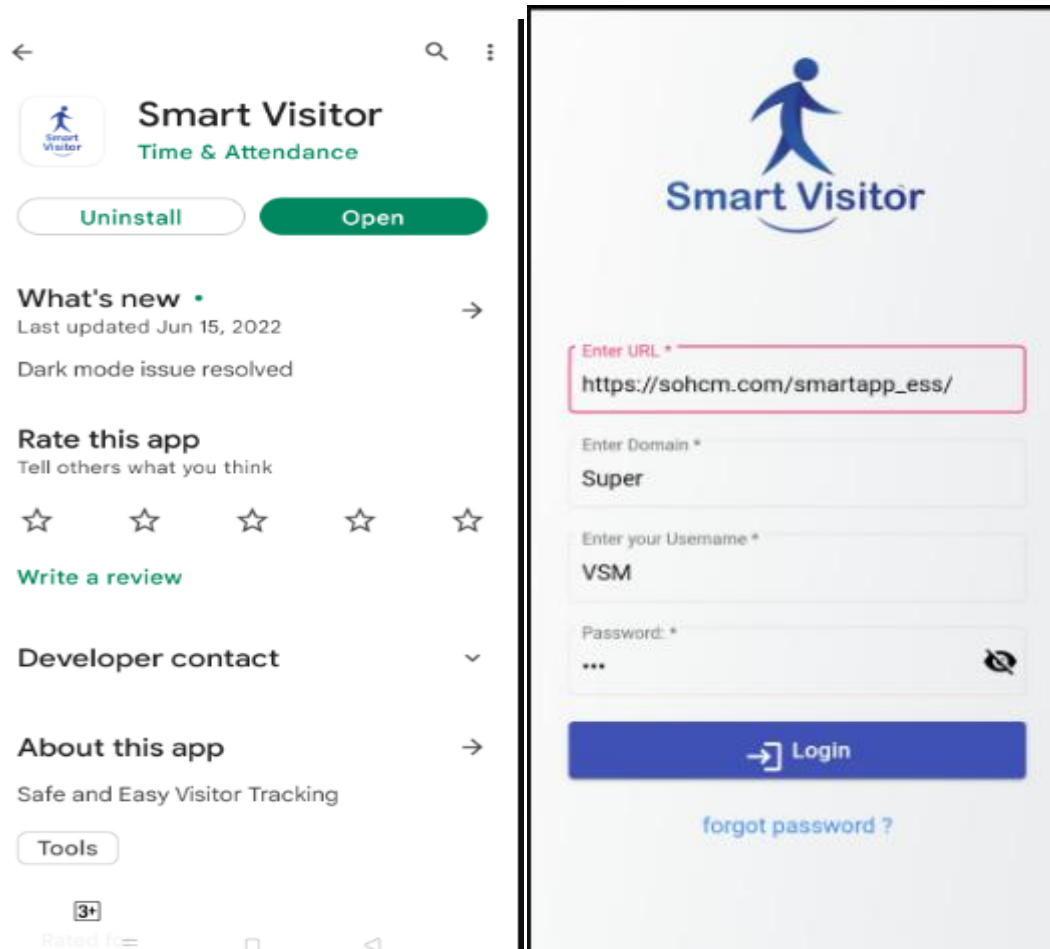
c)



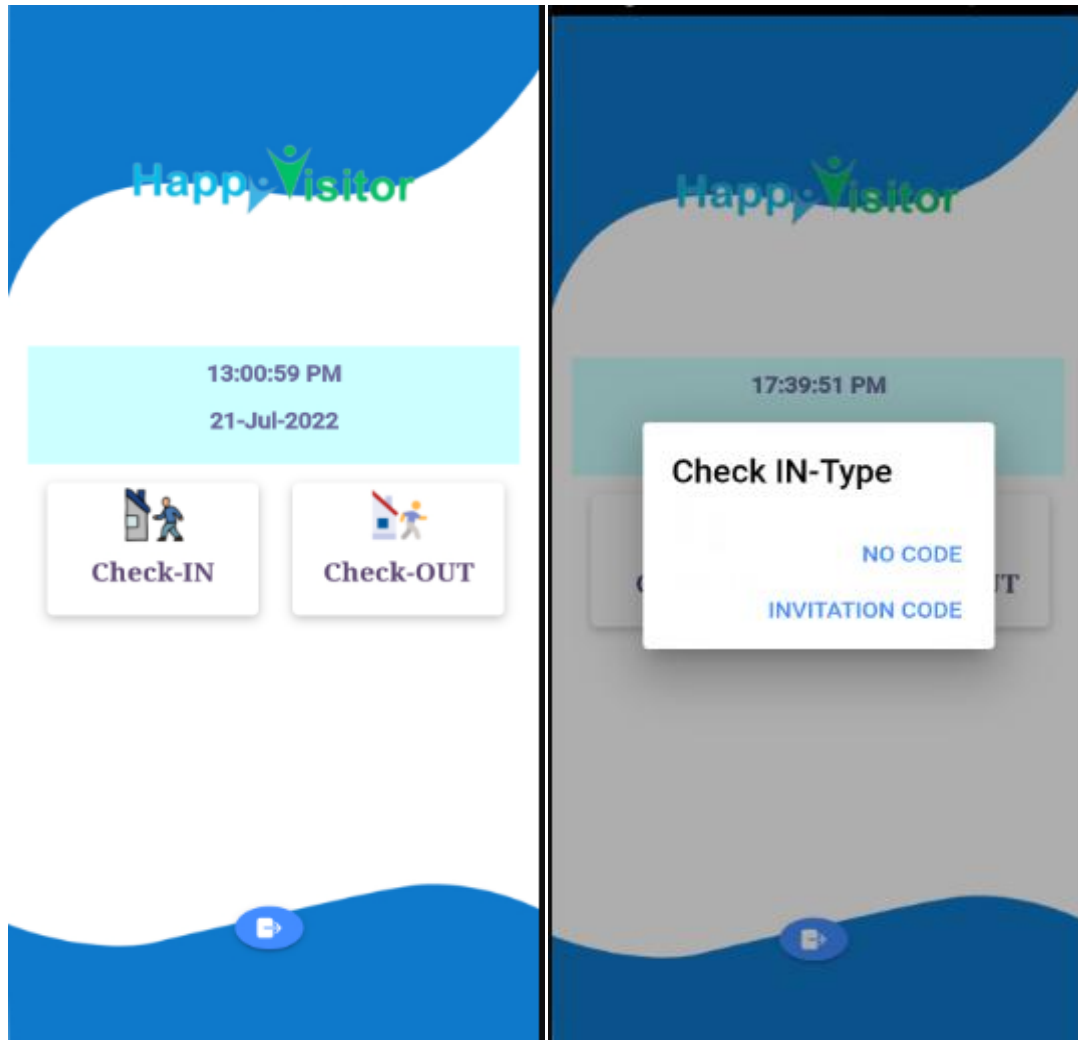
Once details are filled and saved, we can share the invitation code to the visitor through the WhatsApp. It helps the visitor to complete the verification process easily, in visitor app with receptionist. And host can see his visitors list in his login.



- Now receptionist have to install the smart visitor app from play store (<https://play.google.com/store/apps/details?id=com.SmartOffice.Visitor> ) and they have to login with their credentials which is provided by the admin.



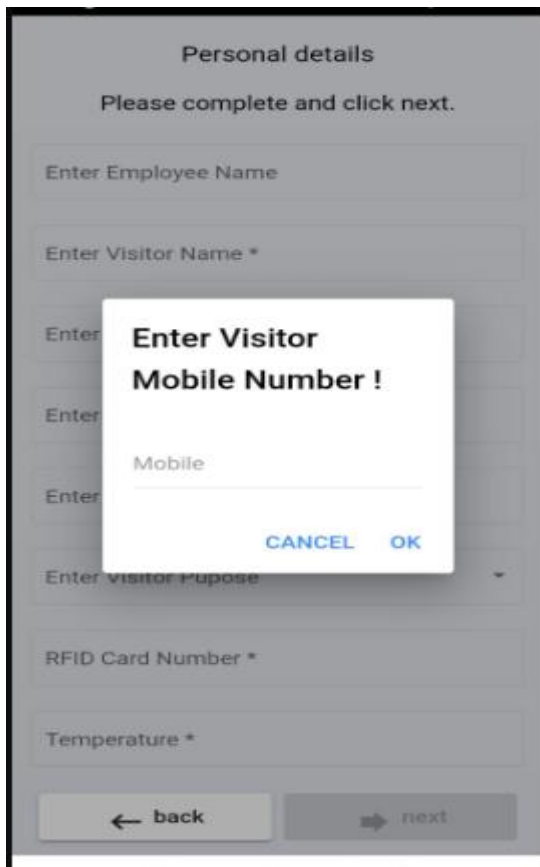
- When receptionist login with smart visitor app he/she gets a check-in and check- out option with date time. Whenever we click on check-in we get 2 options i.e NO CODE and INVITATION CODE.



- i) **NO CODE** – If visitor comes directly without any registration, receptionist can directly fill the visitor details and they can send notification to the host.

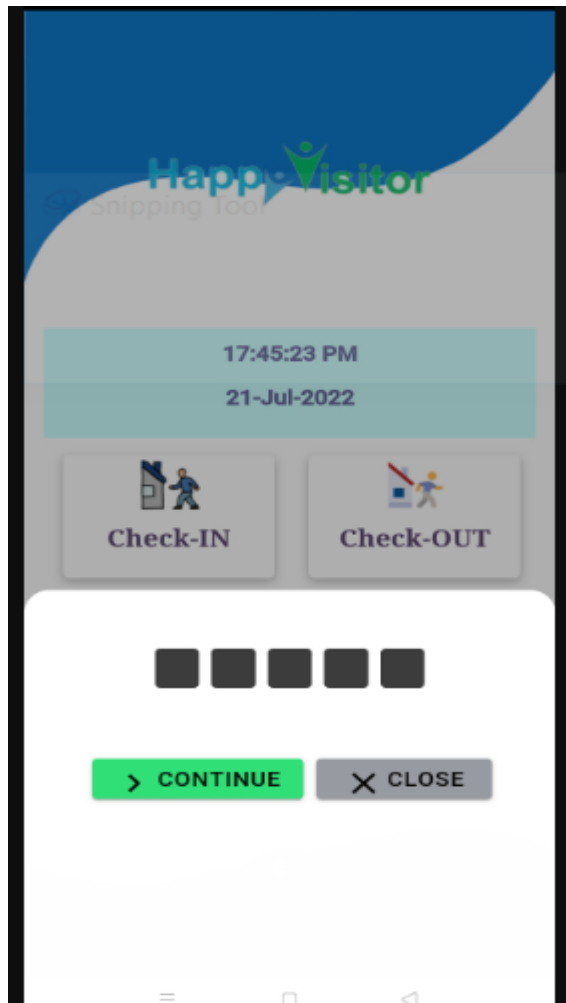
If visitor has visited before just mention the mobile number, details will be automatically fetched and we can send the notification to the host.

If visitor visiting to company for the 1<sup>st</sup> time, receptionist need to do all the process.

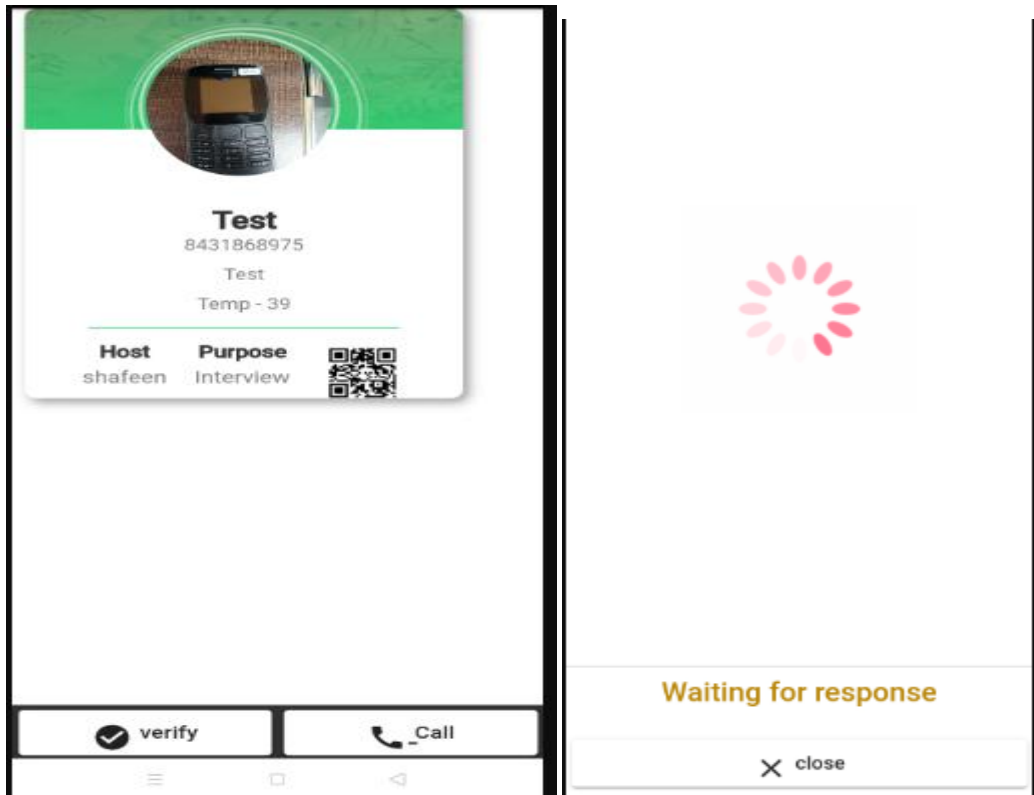


The image shows a mobile application interface for visitor registration. The main form is titled "Personal details" and includes the instruction "Please complete and click next." The form fields are: "Enter Employee Name", "Enter Visitor Name \*", "Enter Visitor Mobile Number \*", "Enter Visitor Purpose", "RFID Card Number \*", and "Temperature \*". A modal dialog box is overlaid on the form, titled "Enter Visitor Mobile Number !", with a text input field labeled "Mobile" and two buttons: "CANCEL" and "OK". At the bottom of the form, there are "back" and "next" navigation buttons.

- ii) **Invitation Code - When Host invites to the visitor invitation code will be sent to the receptionist/visitor that invitation code will be helpful to fetch the details and check who invited to the visitor.**

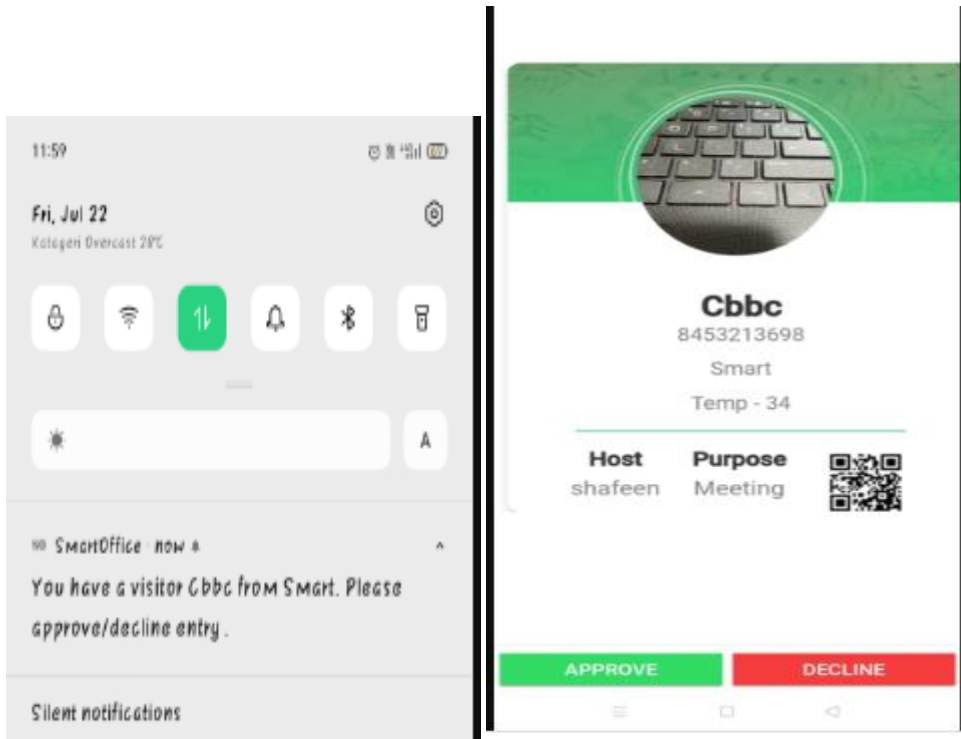


- After details of visitor are filled, receptionist need to take visitor photo and ID proof photo after that ID card will be created (as shown in below image). Then for verification we can send the notification to the concerned host. If concerned host is not responding for any reason you can click on call option and inform to approve or decline the request, using notification which is reflecting on mobile.

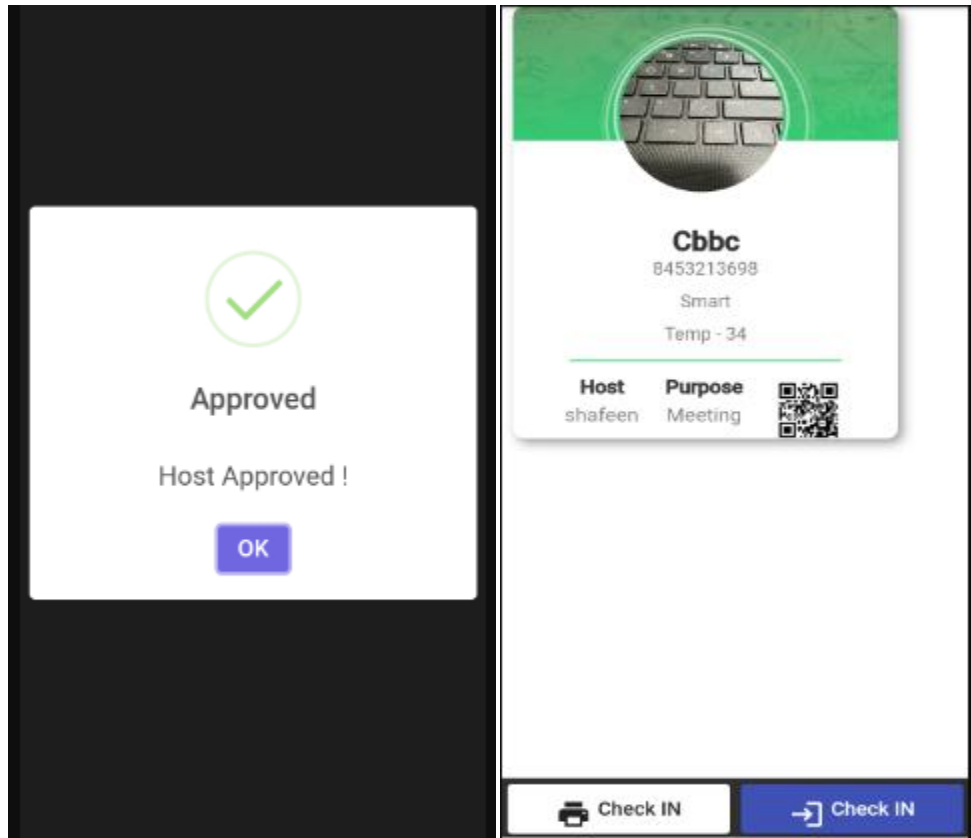




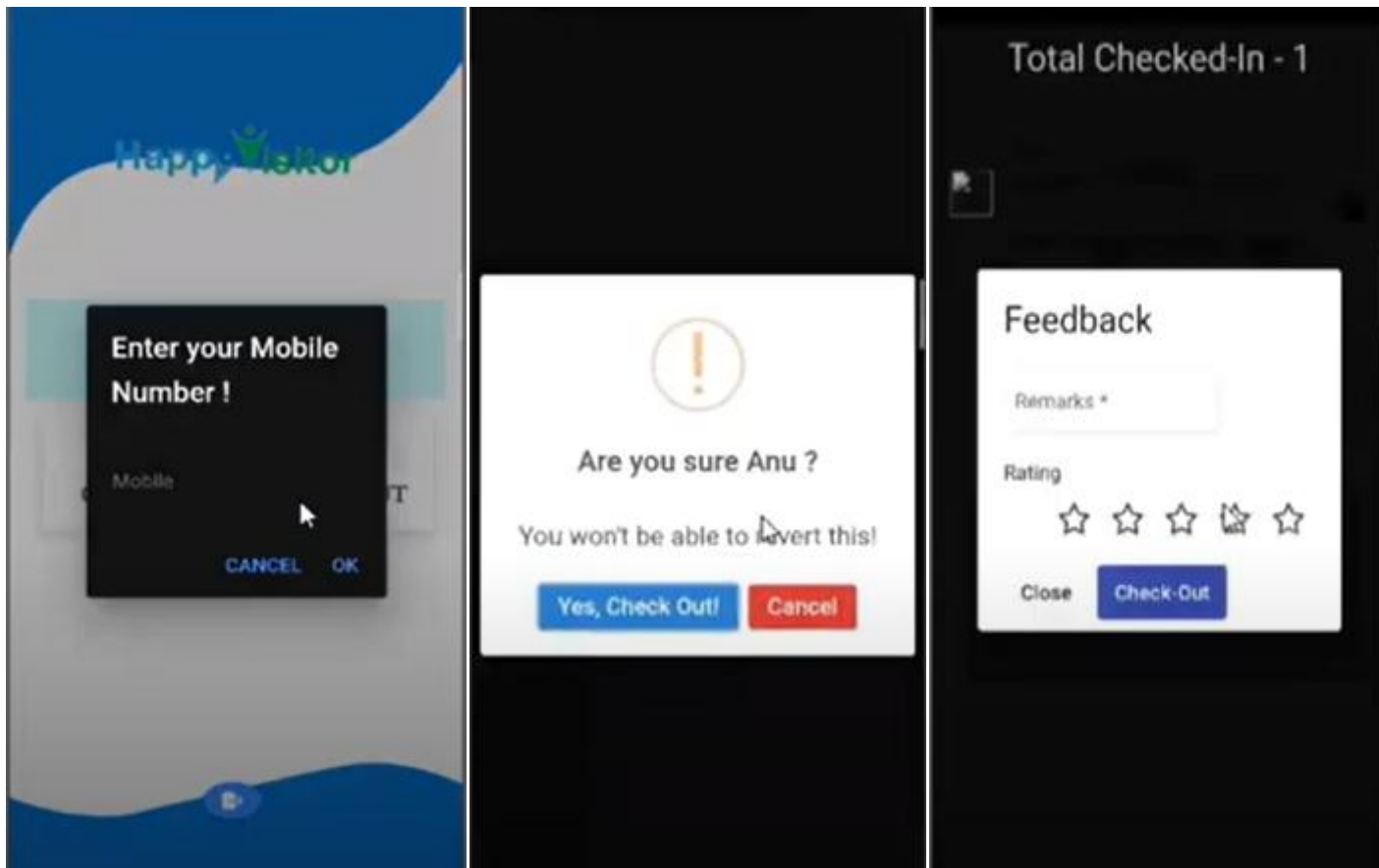
- Host will receive the notification on his mobile as per below image 1. And when host click on notification they can see the visitor details with approve and decline options as per image 2.



- After approval of host, receptionist will receive response as per below image1. The receptionist can provide the ID card in hardcopy by taking print and then visitor can check-in the office.



- After Meeting completes, visitor need to check-out with his mobile number. And they have to give the feedback with ratings and check out.
- Visitor reports can be seen in admin panel in visitor reports.



**Thank you. If you have any questions please write to us on [tlsupport@smartoffice365.in](mailto:tlsupport@smartoffice365.in)**