Customer portal Guide

*For Entity Admins at Customer Organizations*

Purpose of This Guide  
This document provides instructions for Entity Admins to manage settings within the VISITAR Customer Portal, including branding, waiver policies, Active Directory integration, and host management.

**Tech Pundits Tester Please Perform Detailed Review**

**Before Sending to Customer**

1. Entity Admin Role Overview  
Entity Admins are responsible for configuring the VISITAR system for their Entity within the organization. These configurations apply across all Sites under their Entity.

The Customer Portal allows Entity Admins to:

* Upload branding (logos)
* Set a visitor waiver policy
* Manage host lists or connect to Microsoft Active Directory

Changes made in the Customer Portal are reflected in both the Receptionist Portal and tablet check-in app.

# 2. Logging into the Customer Portal

1. Open a web browser and go to the Customer Portal URL
2. Enter your username and password.
3. Click Login.

# 3. Managing Branding / Logos

1. On the left Menu navigate to **General Settings**.
2. Click on “Entity Settings”.
3. Configure your Entity Settings.
   1. App Name: Add the name of your Entity.
   2. App Logo: Upload a logo image you’d like to display on the visitor check-in application.
   3. Badge Logo: Upload a logo you’d like to print on the badge.
      1. We suggest using a black and white logo for best print quality.
      2. Using a landscape image with more width than height will optimize badge print area.
4. Preview the logo on screen before saving.
   1. Logos with more width than height will look “compressed” on screen.
   2. This is OK and is not how they will appear on the badge.
5. Changes take effect immediately across all Sites under your Entity.

# 4. Setting a Waiver Policy

1. On the left Menu navigate to **General Settings**.
2. Click on “Contents”.
3. Click the green pencil icon to edit.
   1. If you just want to view the policy click on the blue eye icon.
4. Paste, edit and submit a Waiver in both English and Spanish.
   1. This can include health and safety terms, legal disclaimers and/or visitor rules.
5. The waiver will appear during check-in at all Sites and must be accepted by visitors to proceed.

# 5. Profile and Password Settings

1. On the left Menu navigate to **Personal Settings**.
2. Click on “Change Password” to manage your password.
3. Click on “Profile” to manage your profile.

# 6. Receptionists and Sites

1. On the left Menu navigate to **Receptionist**.
   1. Toggle the Status toggle do activate or deactivate a Receptionist
   2. Click on the blue eye icon to view the receptionist profile
   3. Click the red trashcan to delete the account
      1. WARNING: This is not reversable. We advise using the Status toggle instead
2. On the left Menu navigate to **Sites**.
   1. Click the green pencil icon to edit the site
   2. Please contact your IT Team if a new site is required
   3. New Sites can only be added by the VISITAR Admin. Please contact your internal IT team if additional Sites are needed so they can negotiate with the vendor and modify the contract.

# 7. Managing Hosts vs Connecting to Active Directory

The VISITAR application will allow customers to manually enter Hosts. However, for large entities / organizations we recommend connecting directly to your Active Directory. This functionality can be added by your IT Team.

Should you choose to add Hosts manually you can follow the instructions below:

1. On the left Menu navigate to **Hosts**.
2. Click “Add” in the upper right
3. Enter full name and email
4. Click “Submit”
5. To remove a Host, click the red trashcan icon under Actions

# 8. Troubleshooting & Support

|  |  |
| --- | --- |
| **Issue** | **Solution** |
| Logo not updating | Check file type and size; try clearing browser cache |
| Waiver not displaying | Ensure waiver was saved and scrollable |
| Teams notifications not sending | Confirm AD integration is active and Teams connection was tested |
| Host list is empty or outdated | Resync directory or manually add a host |

For unresolved issues, contact your IT support who can escalate to VISITAR Support Team if required.