# Visitor Management

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| **Feature Required** |
| Use pass code invites.  * + Replace the intercom and register book for a technologically forward pass code-based solution that makes it easy for residents to participate in the process of approving their visitors. |

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| **Workflow (User Story) How resident will pre-approve a planned guest?** |
| **Step 1** If the Resident intends to call a guest. He should be ready at least with the name & Mobile Number of the guest.  **Step 2** The resident will create a passcode for the guest by adding name and mobile number of the guest. Detail of the guest will be sent to Security along with a passcode (OTP). The same OTP will be shared with guest also. If a guest has no mobile number available, in that case resident will have to call security and approve the guest.  **Step 3** Guest will come to community gate and show the passcode (OTP) to the Security.  **Step 4** Security will validate the passcode (OTP, Name and Mobile Number, Time, Date with Expiry).  **Step 5** If passcode (OTP) is validated then Security will allow the Visitor to enter the community. |

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| **Step-1** | |
| **Screen** | **Description** |
| Graphical user interface, application  Description automatically generated | Resident will have the dashboard to access all the features. |

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| **Step-2** | |
| **Screen** | **Description** |
| Graphical user interface, application  Description automatically generated | In the dashboard resident will choose the option **Add Guest.** |

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| **Step-3** | |
| **Screen** | **Description** |
| A picture containing text  Description automatically generated | The resident will add the guest’s name and mobile number either manually or select a contact from phone contacts to invite.  After filling mobile and name resident will choose the following option:   1. One Time visitor 2. Frequent visitor   If the resident will choose the **One-time visitor** option**,** then the resident will have to choose the date and give the check-in time.  If the resident will choose the **Frequent visitor** option**,** then the resident will have to choose the date range and give the time range. |

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| **Step-4** | |
| **Screen** | **Description** |
| Diagram  Description automatically generated | After invitation, all the invited guest will show in the form of card list  Resident will have the following options:   1. Call 2. Share 3. Edit   By using **Call** option resident can call the guest.  By using **Share** option resident can Share the token (OTP) to the guest.  By using **Edit** option resident can edit the invitation of the guest. Resident can also cancel the invitation by using edit option. |

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| **Step-5** | |
| **Screen** | **Description** |
| Graphical user interface, application  Description automatically generated | Resident can share the token (OTP) as given in screen. |

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| **Step-6** | |
| **Screen** | **Description** |
| Graphical user interface, application  Description automatically generated | Resident can see the details of the visitor inside visitor profile, by choosing a visitor card. |

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| **Step-7** | |
| **Screen** | **Description** |
| Graphical user interface, text, application  Description automatically generated | Resident can see the visiting log details of the visitor inside visitor visit log, by choosing a visitor card. |

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| **Step-8** | |
| **Screen** | **Description** |
| Graphical user interface, text, application, chat or text message  Description automatically generated | Resident can update the visiting time and date of the visitor inside visitor preapprove tab, by choosing a visitor card. |

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| **Feature Required** |
| Verify unexpected visitors  * + The process is also simplified for visitors that simply turn up at the gate. Residents receive a notification on their app, requesting them to approve their entry. One clicks and they’re in.  App should be able to capture the following:  1. Data (name/address/contact no/purpose of visit/vehicle no/type of vehicle/etc.) 2. Photo(visitor/vehicle/etc.) 3. Documents details & snap (ID cards) 4. Safety instructions/Assembly points/important information for the day. |

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| **Work Flow (User Story) How Security will Allow planned (Pre-Approved) Guest** |
| **Step 1** If any guest will come to the community gate having a preapproval. Security will take the token number of preapproval.  **Step 2** Security will validate the token number. If token is validated then security will move to the **step 3**.  **Step 3** Security will take the required details such asbody temperature, mask available or not, photo, Name, Address.    **Step 4** Security will allow the guest to enter the community. |

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| **Step-1** | |
| **Screen** | **Description** |
| Graphical user interface, text, letter  Description automatically generated | The security will have the dashboard as shown on screen.  All the Visitor (guest, delivery, cab, visiting help) will be placed inside **visitor Tab.**  All the property staff will take place inside the **staff tab**  All the check-in visitors will be visible in **check out tab**, so that security will check them out.  All the preapproved but not checked-in yet visitors will be visible inside the **completed tab.**    If a preapproved guest will come to the community gate, then security will ask for the token from the guest and will choose the option token number.  After Searching the token, security will check in the guest. After getting checked in visitors will be visible inside the checkout tab. |

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| **Work Flow (User Story) How Security will Allow unplanned (Not Pre-Approved) Guest** |
| **Step 1** If any guest will come to the community gate without any preapproval. Security will take the body temperature, mask available or not, photo, Name, Address, and mobile (if available).  **Step 2** Security will send a request to the resident to approve/reject the guest.  **Step 3** If the resident will approve the guest, then security will allow the guest to enter the community. OR resident can call security for getting more details about the guest. |

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| **Step-1** | |
| **Screen** | **Description** |
| Graphical user interface, text, letter  Description automatically generated | Security will choo se the **Add Visitor** Button. |

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| **Step-2** | |
| **Screen** | **Description** |
| Text  Description automatically generated | Security will select the unit number. |

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| **Step-3** | |
| **Screen** | **Description** |
| Graphical user interface  Description automatically generated with medium confidence | Security will fill all the details and add the guest. This guest will be visible inside the completed tab. |

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| **Step-4** | |
| **Screen** | **Description** |
| A picture containing letter  Description automatically generated | After Saving the form a request will be sent to the resident to allow / reject the unplanned guest.  If the resident will not have the app installed, the question mark symbol will be visible on the card.  If the resident will have the app installed, but resident not responded, then the question mark symbol will be visible.  If resident will allow the guest, security will allow the guest to enter into the community.  If the resident will reject the guest, then guest will remain visible in the completed list. |

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| **Step-5** | |
| **Screen** | **Description** |
| Graphical user interface, text, application  Description automatically generated | Security will check out the guest by using the checkout tab. |

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| **Work Flow (User Story) How Security will Allow a Delivery** |
| **Step 1** If any Delivery will come to the community gate. Security will take the body temperature, mask available or not, mobile Number, photo, Name, Company.  **Step 2** Security will send a request to the resident to approve/reject the delivery.  **Step 3** If the resident will approve the delivery, then security will allow the delivery to enter the community. OR resident can call security for getting more details about the delivery. |

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| **Step-1** | |
| **Screen** | **Description** |
| Graphical user interface, text, letter  Description automatically generated | The security will have the dashboard as shown on screen.  All the Visitor (guest, delivery, cab, visiting help) will be placed inside **visitor Tab.**  All the property staff will take place inside the **staff tab**  All the check-in visitors will be visible in **check out tab**, so that security will check them out.  All the preapproved but not checked-in yet visitors will be visible inside the **queue tab.**    If a vendor will come to the community gate, then security will ask for the Unit Number where he intends to visit. |

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| **Step-2** | |
| **Screen** | **Description** |
| Text  Description automatically generated | Security will select the unit number / numbers. |

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| **Step-3** | |
| **Screen** | **Description** |
| Graphical user interface  Description automatically generated | Security will fill all the details and add the vendor. This vendor will be visible inside the check in tab until any resident not approves the vendor. |

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| **Step-4** | |
| **Screen** | **Description** |
| Graphical user interface, text, application  Description automatically generated | All the selected units residents will get a notification of delivery.  If the resident will not have the app installed, the question mark symbol will be visible on the card.  If the resident will have the app installed, but resident not responded, then the question mark symbol will be visible. |

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| **Step-5** | |
| **Screen** | **Description** |
| Text  Description automatically generated | Delivery will be listed inside checkout tab. |

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| **Work Flow (User Story) How Security will Allow a Visiting Help** |
| **Step 1** If any Visiting Help will come to the community gate. Security will take the body temperature, mask available or not, mobile Number, photo, Name, Company.  **Step 2** Security will send a request to the resident to approve/reject the visiting help.  **Step 3** If the resident will approve the delivery, then security will allow the delivery to enter the community. OR resident can call security for getting more details about the delivery. |

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| **Step-1** | |
| **Screen** | **Description** |
| Graphical user interface, text, letter  Description automatically generated | The security will have the dashboard as shown on screen.  All the Visitor (guest, delivery, cab, visiting help) will be placed inside **visitor Tab.**  All the property staff will take place inside the **staff tab**  All the check-in visitors will be visible in **check out tab**, so that security will check them out.  All the preapproved but not checked-in yet visitors will be visible inside the **queue tab.**    If a vendor will come to the community gate, then security will ask for the Unit Number where he intends to visit. |

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| **Step-2** | |
| **Screen** | **Description** |
| Text  Description automatically generated | Security will select the unit number / numbers. |

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| **Step-3** | |
| **Screen** | **Description** |
| Text  Description automatically generated with low confidence | Security will fill all the details and add the visiting help. This visitor will be visible inside the check in tab until resident not approves the visiting help. |

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| **Step-4** | |
| **Screen** | **Description** |
| A picture containing graphical user interface  Description automatically generated | Selected unit’s residents will get a notification of visiting help.  If the resident will not have the app installed, the question mark symbol will be visible on the card.  If the resident will have the app installed, but resident not responded, then the question mark symbol will be visible. |

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| **Step-5** | |
| **Screen** | **Description** |
| Graphical user interface, text, application  Description automatically generated | Visiting Help will be listed inside checkout tab. |

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| **Work Flow (User Story) How Security will Allow a Cab** |
| **Step 1** If any Cab will come to the community gate. Security will take the body temperature, mask available or not, mobile Number, photo, Name, Company of the driver of the cab.  **Step 2** Security will send a request to the resident to approve/reject the cab.  **Step 3** If the resident will approve the cab, then security will allow the cab to enter the community. OR resident can call security for getting more details about the cab. |

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| **Step-1** | |
| **Screen** | **Description** |
|  | The security will have the dashboard as shown on screen.  All the Visitor (guest, delivery, cab, visiting help) will be placed inside **visitor Tab.**  All the property staff will take place inside the **staff tab**  All the check-in visitors will be visible in **check out tab**, so that security will check them out.  All the preapproved but not checked-in yet visitors will be visible inside the **queue tab.**    If a vendor will come to the community gate, then security will ask for the Unit Number where he intends to visit. |

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| **Step-2** | |
| **Screen** | **Description** |
| Text  Description automatically generated | Security will select the unit number / numbers. |

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| **Step-3** | |
| **Screen** | **Description** |
| Text  Description automatically generated with low confidence | Security will fill the cab details and add. This cab will be visible inside the check in tab until resident not approves the cab. |

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| **Step-4** | |
| **Screen** | **Description** |
| A picture containing letter  Description automatically generated | Selected unit residents will get a notification of cab.  If the resident will not have the app installed, the question mark symbol will be visible on the card.  If the resident will have the app installed, but resident not responded, then the question mark symbol will be visible. |

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| **Step-5** | |
| **Screen** | **Description** |
| Graphical user interface, text  Description automatically generated | Cab will be listed inside checkout tab. |

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| **Work Flow (User Story) How Security will Allow Daily Visitor (Home Help / Staff)** |
| **Step 1** If daily help / staff will come to the community gate that is not registered in community.  **Step 2** Security will ask for Mobile number, Name, Address, and registered as a Guest.  **Step 3** Admin will create Daily Help / Staff ID after getting all the details of the daily help / staff.  **Step 4** Security will always use this ID to allow the daily help to enter in the community. |

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| **Step-1** | |
| **Screen** | **Description** |
|  | All the staff registered in the community will be visible everyday inside the Staff tab with check in option. Security will select the IN button to check in the staff. Security can also scan ID QR code to search staff record. |

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| **Step-1** | |
| **Screen** | **Description** |
|  | All the staff already Checked in will be visible inside the checkout tab. Security will check out the staff by pressing the **OUT** button. |

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| **Work Flow (User Story) How Security will Approve Visitor (Other Category)** |
| **Step 1** If any Other Type of visitor will come to the community gate without any preapproval. Security will take the body temperature, mask available or not, mobile Number, photo, Name, Company.  **Step 2** Security will send a request to the concern person/department to approve / reject the visitor.  **Step 3** If the concerned person will approve the visitor, then security will allow the visitor to enter the community. OR resident can call security for getting more details about the visitor. |

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| **Step-1** | |
| **Screen** | **Description** |
|  | If staff come first time inside the community, and are not yet registered.  Security will choose the Unit Number Button. |

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| **Step-2** | |
| **Screen** | **Description** |
|  | Security will choose the Unit Number Office / Admin Block. |

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| **Step-3** | |
| **Screen** | **Description** |
| Graphical user interface  Description automatically generated with medium confidence | Security will fill the visitor details in the form and add the visitor. |

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| **Step-3** | |
| **Screen** | **Description** |
| Graphical user interface, diagram  Description automatically generated | A popup will appear to the admin dashboard. |

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| **Step-4** | |
| **Screen** | **Description** |
| Graphical user interface, text, application  Description automatically generated | If admin will approve the visitor, then security will allow the visitor to enter into the community and visitor will visible inside the checkout tab. |

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| **Feature Required** |
| Resolve parking issues  * + A visitor’s car is in a resident's spot? Fix this with ease on app, simply enter the vehicle number and get the owner’s contact details. Resolve the issue quickly. |

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| **Work Flow (User Story)** |
| **Step 1** Security will get a complaint on call when a visitor’s car is in a resident's spot.  **Step 2** Security will find the car owner's mobile number by using the car number.  **Step 3** Security will call the car owner and inform. |

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| **Step-1** | |
| **Screen** | **Description** |
| Graphical user interface, text, application  Description automatically generated | Security will Search for guest vehicle number and call them after getting mobile number. |

## Material Movement - Resident Initiated

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| Work Flow (User Story) Case 1 Material-Out |
| **Step 1** Resident will create a gate pass. This gate pass will contain the details (description of material) or photo of the material that needs to be moved outside.  **Step 2** Security will verify the visitor's material movement pass with the description of material.  **Step 3** After verification material can be moved outside. |

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| Work Flow (User Story) Case 2 Material-In |
| Step 1 Resident will create a material movement pass by adding name and mobile number of **Bearer**. This material movement pass will contain the details of the material that needs to be moved inside.  Step 2 Security will verify the visitor's material movement pass with the material description.  Step 3 After verification material can be moved inside.  ***\* If mobile number not available then resident will follow the procedure as given in guest preapprove section.*** |

## Material Movement - Admin Initiated

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| **Work Flow (User Story) Case 1 Material out** |
| **Step 1** Property Admin will create a material movement pass. This material movement pass will contain the details/challan of the material that needs to be moved outside.  **Step 2** Security will verify the visitor's material movement pass with the material.  **Step 3** After verification material can be moved outside. |

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| **Work Flow (User Story) Case 1 Material in** |
| Step 1 Property Admin will create a material movement pass. This material movement pass will contain the details/challan of the material that needs to be moved inside.  Step 2 Security will verify the visitor's material movement pass with the material.  Step 3 After verification material can be moved inside.  ***Remark: This module only handles the material movement pass based on challan generated by inventory module.*** |