



# Visitor Management

## Employee User Guide

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## Overview

Splan Visitor Management System provides an easy way to manage a visitor's registration, checkin process, activities, creating badges etc. Optimized for your industry, it can be scaled globally and implemented in the cloud or on premise. Splan provides highly configurable solutions allowing our clients to dynamically change their integration parameters based on unique requirements, per site or location.

This quick reference guide is for the Staff Employees where it is the default role for most users of VMS. This role allows employees to register and maintain their visitors, delegates and profile.

## Create a New Visitor

New Visitor tab enables the employee to schedule a visit. Click **"New Visitor"** tab on the home screen to register a visit. The employee will be directed to the following screen.

New Visitor Registration

You can import a group of visitors from a CSV file by clicking here: [Upload Visitors](#). You can search the visitors by clicking here [Search visitors](#)

**Visitor Information**

First Name \*  Email

Last Name \*  Mobile Number

**Visit Information**

Location Name \*

Whom you are meeting? \*

Start Date  End Date

Start Time  End Time

Reason for Visit  Representing Company

Comments  Duration(In Minutes)

- Enter the required information in the fields and click **"Save"** to register a visitor.
- Click **"Save"** to register the visitor or **" +Add Another Visitor"** to save the first visitor information and be directly navigated to add another visitor's information.

## Multiple Visitors Upload

“**Visitors Upload**” enables the employee to register multiple visitors at by uploading one .csv file. The employee will fill the basic visitor details such as: First Name, Last Name, Email, and Mobile Number of the visitors.

1. Click “**Visitors Upload**” tab on the home screen. The user will be directed to the following screen.
2. Click “**Basic Upload**” to upload multiple visitors. The Basic Upload feature is a 4-step process to be followed.
  - Step 1: Download Link (Sample Visitor Template)
    - Download the CSV file from the link and save the file on your local machine. Enter the basic details of the visitors. The basic details include first name, last name, company details, visitor phone number.
  - Step 2: Upload Visitors
    - Click “Upload” and attach the file. Once the file is successfully uploaded, a pop-up message will be displayed on the screen as shown.
    - Click “Next” for further process.
  - Step 3: Add Visit Information
    - Enter the Visit Information details and click “Next”.
  - Step 4: Preview and Submit
    - All Visitors information along with date and time of the visit can be previewed before finalizing the registration. The employee can also edit and delete a specific visitor
    - Click on the Edit icon under Actions tab to edit a specific visitor. Upon editing the visit detail, click Update and Save. The visitors will be registered.
    - Click on the Delete icon under Actions tab to delete a specific visitor. Upon deleting the visitor, click Update and Save. The visitors will be registered.

## Search Visitors

The employee can search in for the visitor details by clicking “**Search Visitors**” option from “**New Visitor Registration**” page. A pop-up screen will appear. Type in the Name of the visitor and view the visitor details along with the details of number of visits he/she has made to the organization.

Member ID	Name	Email	Location Name	Latest Status
11436397	David Warner	davidwarner@outlook.com	BEGUMPET HYD	Registered on 01-20-2019 11:23 AM

## Edit/Cancel/Schedule Visit

An employee can edit, cancel, and schedule a visit for a particular visitor from the drop down list at Dashboard screen by selecting action.

Please use From Date or To Date from Advanced search to get data from last 1 year

Welcome  
Paul Neumann  
You Have 1 visitor(s) for today.

Pending Visits

4

Previous Visits

0

Search visitors  Advanced Search

All ✓ Pending Visits Previous Visits + New Visitor Registration

Member Id	Name	Email	Host / Sponsor	Meeting Date & Time	Location Name	Representing Company	Latest Status	Action
10782571	Travis Head	travishead@gmail.com	Paul Neumann	01-24-2019 11:25 AM	BEGUMPET HYD		Registered on 01-20-2019 11:26 AM	Action
12550295	Mitchell Marsh	mitchmarsh@gmail.com	Paul Neumann	01-24-2019 10:00 AM	BEGUMPET HYD		Registered on 01-20-2019 11:26 AM	Edit Cancel Schedule
11436397	David Warner	davidwarner@outlook.com	Paul Neumann	01-20-2019 03:25 PM	BEGUMPET HYD		Registered on 01-20-2019 11:23 AM	Action
10782565	Shaun Marsh	shaunmarsh@outlook.com	Paul Neumann	01-22-2019 11:00 AM	BEGUMPET HYD		Registered on 01-20-2019 11:22	Action