

Log an escort visit

Record each person you escort to a tenant, and find those records later.

An escort visit is a record that a person, such as a courier or contractor, was escorted from the front desk to a tenant contact (a named person at the tenant). Each visit stores who came, which company they're from, who they visited, the reason, and the check-in time. Managers and Associates can log and view escort visits in the iPad app.

Log an escort visit

- 1 In the iPad app, tap **Escorts**.
- 2 Tap the **+** button in the bottom-right corner. The **Add escort** screen opens.
- 3 Tap **Escort**, then type at least two characters of the person's name in **Search escorts....** Search matches the start of the full name, so type the first name first.
- 4 Tap the person in the results. If they aren't listed, tap the row that shows the name you typed with **Create new** under it, then **add the person**.
- 5 Tap **Tenant contact**, tap the tenant, then tap the contact the person is visiting. You can filter both lists with **Search tenants...** and **Search contacts....**
- 6 In **Reason**, enter why the person is visiting (at least two characters).
- 7 Tap **Save & Add escort**.

The visit appears at the top of the **Escorts** list, showing the person, their company, and **Visiting:** with the contact and tenant.

Note: Logging an escort visit doesn't notify the tenant contact. Call or message them yourself if they need to come down.

Add a new person

When you tap **Create new**, the **Add courier** form opens with the name you typed already filled in.

- 1 (Optional) Tap **Scan ID** and photograph the person's ID. The app fills in **First name**, **Last name**, and **ID number** from the scan. Check them before you continue.

- 2 Enter or correct **First name** and **Last name**.
- 3 Tap **Photo**, then tap **Take Photo** or **Choose from Library**.
- 4 Tap **Company**, search for the person's company, and tap it. If it isn't listed, tap **Create new**, enter the **Company name**, and tap **Create company**.
- 5 (Optional) Enter an **ID number**.
- 6 Tap **Save courier**.

You return to **Add escort** with the new person selected in **Escort**. Carry on from step 5 above.

Note: People you add here join your location's courier list, so you can also pick them when you log a package.

View escort visits

- 1 In the iPad app, tap **Escorts**.
- 2 Tap a period at the top of the list:
 - **Today**: visits logged today. This is the default.
 - **This Week**: visits since Sunday.
 - **This Month**: visits since the 1st of the month.
 - **This Quarter**: visits since the start of the quarter.
- 3 Tap a visit to open **Escort Details**.

Escort Details shows the person's photo, **Company**, **ID Number** (if entered), **Visiting Tenant**, **Tenant Contact**, **Reason for Visit**, and **Check-in Time**. Escort visits can't be edited, checked out, or deleted in the iPad app.

Search escort visits

- 1 In the iPad app, tap **Escorts**, then tap the search icon in the top-right corner.
- 2 Set one or more filters on **Search for escorts**:
 - **Logged after** and **Logged before**: pick a date, then tap **Done**. Tap **Clear Date** to remove it.
 - **Courier company**: the visitor's company.
 - **Courier**: the visitor.
 - **Company name**: the tenant they visited.

- 3 Tap **View matching escorts (number)**. Tap **Clear** at any time to reset every filter.

Search results lists each match with its **Date**, **Courier**, **Tenant**, and **Reason**.

Troubleshooting

- **Save & Add escort stays grey:** Fill in all three fields: **Escort**, **Tenant contact**, and **Reason**.
- **Save courier stays grey:** **First name**, **Last name**, **Photo**, and **Company** are all required. **ID number** isn't.
- **"No escorts found" when you search for a person:** Type at least two characters, starting with the first name. If they're new, tap **Create new**.
- **"No contacts available":** The tenant has no contacts yet. Add a contact to the tenant, then log the visit.

See also

- Log an incoming package
- Deliver a package