



Ai4 Society Connect for Creatio

POWERED BY  ai4process

User Manual

Your guide to smarter collaboration
and seamless processes.



User Friendly

Designed for ease of use
and efficiency.



Connected

Bringing people, processes
and technology together.



Secure

Built with security and
trust at the core.



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Smarter together. Stronger impact.

(★ Important: Steps mentioned under headings marked as **Important** are mandatory and must be configured after installing the package.)

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Ai4 Society Connect user manual

1. Introduction

1.1 About Ai4 Society Connect

Ai4 society connect is a comprehensive Society Management Application designed to streamline and automate day-to-day society operations. The application provides a centralized platform for managing residential communities, residents, visitors, complaints, staff attendance, invoices, payments, and society-wide announcements.

The application enables seamless collaboration between society administrators, residents, and security personnel, ensuring efficient communication, improved transparency, and enhanced operational control.

By digitizing manual processes, Ai4 society connect helps societies improve resident experience, reduce administrative effort, and maintain accurate records across all society activities.

1.2 Purpose of the Application

The primary purpose of Ai4 society connect is to:

- Manage societies and residential units efficiently.
- Simplify resident onboarding and profile management.
- Streamline visitor entry and approval processes.
- Track complaints and their resolution lifecycle.
- Generate and manage invoices for residents and commercial units.
- Process and approve payments securely.
- Maintain attendance records for society staff.
- Communicate important updates through announcements.
- Provide role-based access to administrators, residents, and security personnel.

1.3 Intended Audience

- Society Administrators
- Residents
- Security Personnel

1.4 Key Features

- Resident Onboarding and Management

- Visitor Management
- Help Desk Management
- Invoice and Payment Management
- Society Staff Attendance
- Announcements and Communication
- Approval Workflows

2. Application Roles and Responsibilities

2.1 Administrator Role

The Administrator is responsible for managing overall society operations. Key responsibilities include:

- Managing societies and society units.
- Approving resident registration requests.
- Managing visitor records and approvals.
- Handling complaints and service requests.
- Generating invoices.
- Approving resident payments.
- Managing society staff records.
- Publishing announcements for residents.

2.2 Resident Role

Residents can access and manage information related to their own unit and society activities. Key responsibilities include:

- Registering and maintaining profile information.
- Managing family members, vehicles, and domestic staff.
- Creating pre-approved visitor requests.
- Tracking visitor activities.
- Raising complaints and tracking resolution status.
- Viewing invoices and submitting payments.
- Viewing society announcements.

2.3 Security Role

The Security role is responsible for managing visitor movement and society staff attendance. Key responsibilities include:

- Managing visitor check-in and check-out activities.
- Processing visitor approval requests.
- Recording visitor entry and exit details.

- Managing attendance records for society staff.
- Maintaining security-related operational records.

3. Application Overview

The Ai4 society connect application consists of the following core sections:

3.1 Societies

Stores information about societies, including society details and configuration settings.

3.2 Society Units

Maintains information about each individual unit within a society.

3.3 Residents

Stores resident information, profile details, family members, vehicles, domestic staff, invoices, complaints, and visitor-related information.

3.4 Visitors

Manages visitor entries and exit logs, approvals, check-in/check-out activities, and visitor history.

3.5 Society staffs

Maintains society staff records and attendance management.

3.6 Complaints

Tracks resident complaints, resolution activities, approvals, and closure processes.

3.7 Commercial spaces

Maintains information about commercial units operating within the society.

3.8 Society Invoices

Manages invoice generation, billing information, payment tracking, and invoice statuses.

3.9 Payments

Maintains payment records submitted by residents and supports payment approval workflows.

3.10 Announcements

Provides a centralized platform for publishing important notices, updates, and society communications.

4. Application Configuration (One - Time Setup)

Before using the Ai4 society connect application, the administrator must configure the required

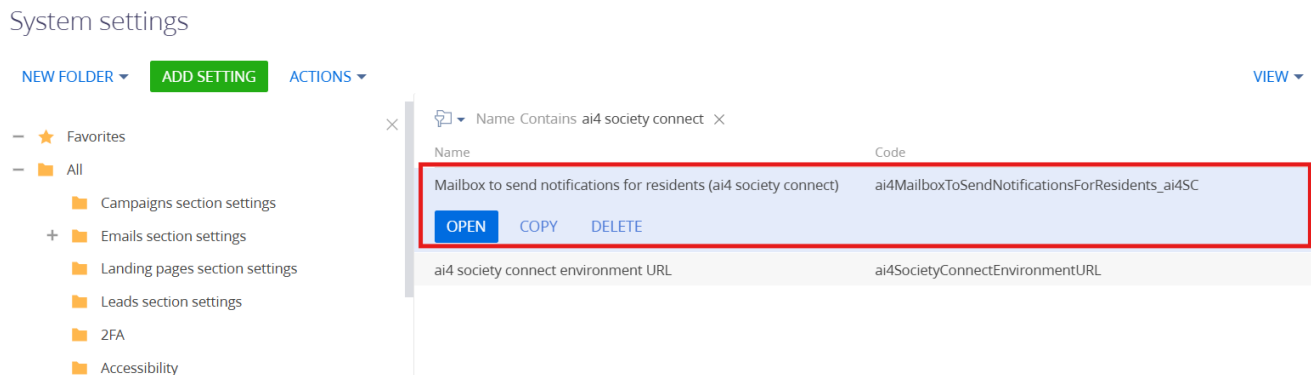
system settings. These settings ensure that the application sends email notifications correctly and generates links that point to the appropriate environment

4.1 Configure System Email (Important)

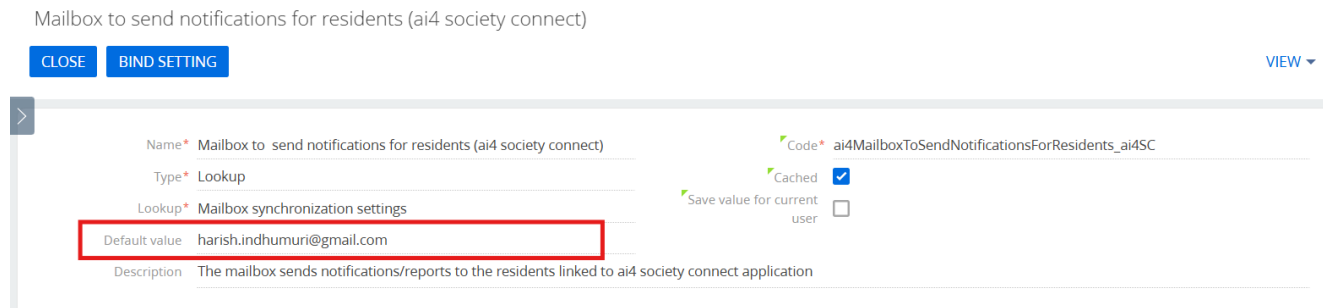
The **System Email** setting specifies the email address that will be used to send system-generated notifications to residents, such as registration approval, invoice generation, payment approval, and other application notifications.

Steps

1. Navigate to **System Designer** → **System Settings**.
2. Search for **Mailbox to send notifications for residents (ai4 society connect)**.



3. Open the system setting.
4. Replace the default value with a valid and working email address.



5. Save the changes.

Note: Ensure that the configured email account is properly set up in Creatio for sending emails. All application notifications will be sent from this email address.

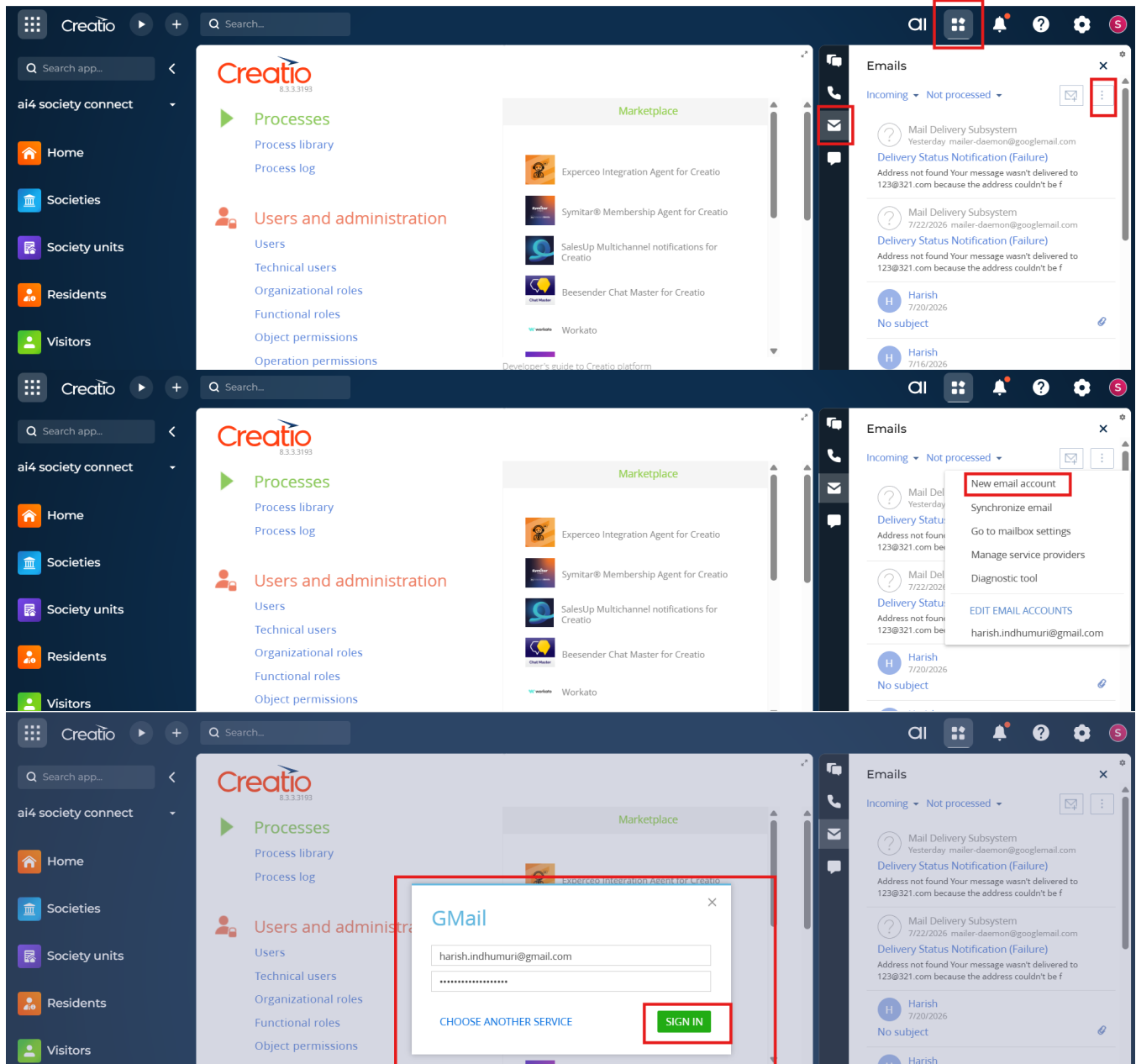
4.2 Configure the System Email (Important)

The **System Email** system setting is used to define the email account from which the Ai4 Society Connect application sends notifications to residents. Before selecting an email address as the default value in this system setting, the email account must first be configured in the Creatio environment.

Adding an Email Account to the Creatio Environment

Follow the steps below to add an email account:

1. Log in to the Creatio environment.
2. Click the **Communication Panel** icon located in the top-right corner of the application.
3. Select **Email**.
4. Click the **More Options (:)** menu.
5. Select **New Email Account**.
6. Enter the required details:
 - a. **Email Address**
 - b. **App Password** (generated for your email account)
7. Click **Sign in**.



Once the email account is successfully added, it becomes available in the Creatio environment and

can be selected as the default value for the **System Email** system setting.

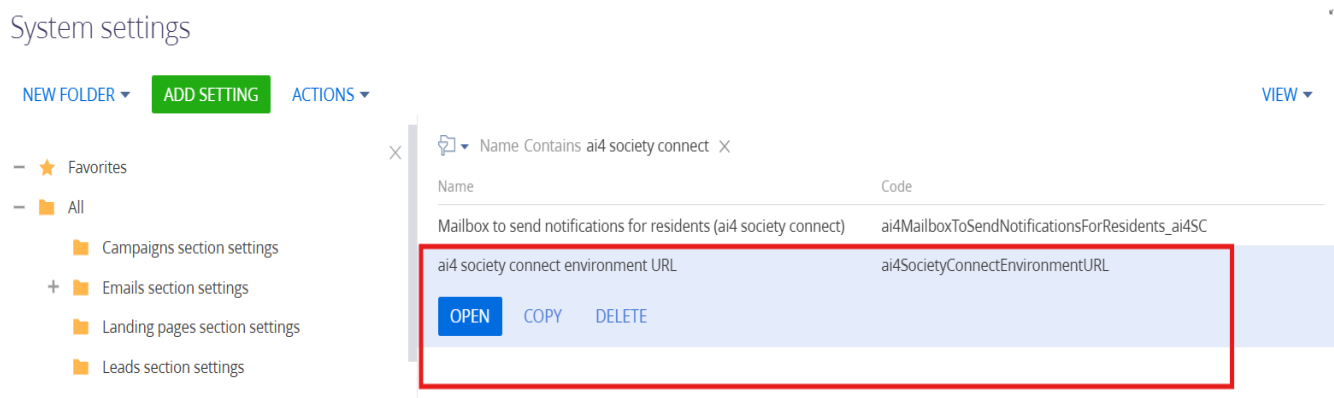
Note: Ensure that the configured email account is active and has a valid App Password. This email account will be used to send all automated email notifications generated by the Ai4 Society Connect application.

4.2 Configure Environment URL (Important)

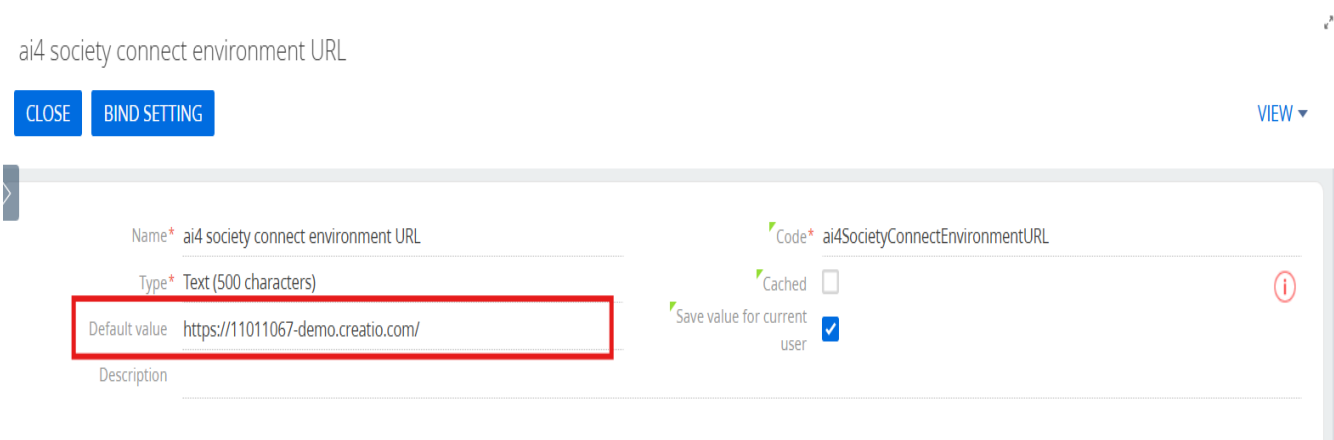
The Environment URL setting stores the URL of the Creatio environment where the ai4 society connect application is installed. This URL is used when generating links in email notifications, allowing residents to access the application directly.

Steps

1. Navigate to **System Designer** → **System Settings**.
2. Search for **ai4 society connect environment URL**.



3. Open the system setting.
4. Replace the default value with your Creatio environment URL.



5. Save the changes.

Example:

<https://your-environment.creatio.com>

Note: Ensure that the URL points to the environment where the Ai4 society connect application is deployed. An incorrect URL may prevent residents from accessing the application through links received in email notifications.

4.3 Prerequisite - Configure Societies and Society Units (Important)

Before residents begin the registration process, the **Admin User** must configure the Society and Society Unit master data in the application.

These records are used during resident onboarding. If no Society or Society Unit records are available, residents will not be able to complete the registration process.

Steps to Configure Society Data

1. Log in using an **Admin User**.
2. Navigate to the **Societies** section.
3. Create all societies applicable to your Community.
4. Navigate to the **Society Units** section.
5. Create the corresponding units (such as Flats, Villas, or Commercial Spaces) and associate each unit with the appropriate society.
6. Save the records.

Once the Society and Society Unit records have been configured, residents can successfully select their society and Society unit during the registration process.

Note: Configuring the Society and Society Unit master data is a mandatory prerequisite before residents can register and use the Ai4 Society Connect application.

4.4 One-Time Setup - Configure Workplace Access (Important)

Before using the **Ai4 Society Connect** application, a one-time workplace configuration must be performed by a **System Administrator**.

By default, Creatio grants the **All Employees** organizational role access to the standard out-of-the-box (OOTB) workplaces such as **CRM, Sales, Service, Marketing**, and others. As a result, users assigned to the **Resident, External Resident, and Visitor Management** functional roles may also have access to these workplaces.

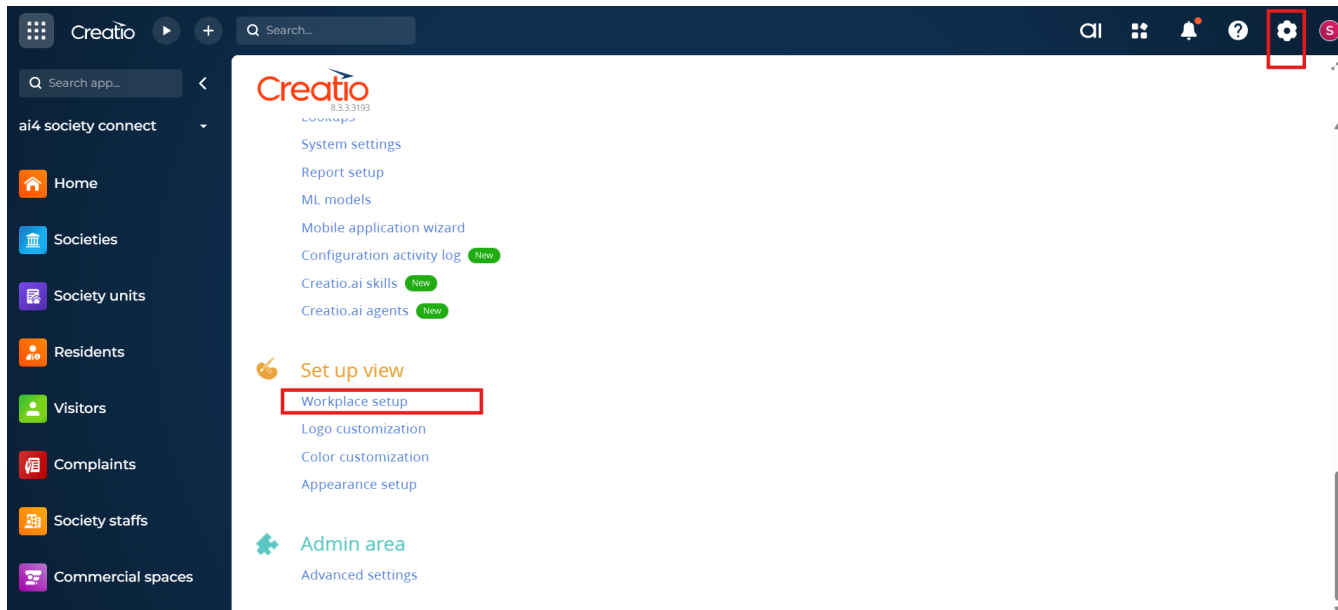
To ensure that users can access only the workplaces intended for the **Ai4 Society Connect** application, the System Administrator must remove the **All Employees** organizational role from the following OOTB workplaces:

- CRM
- Sales

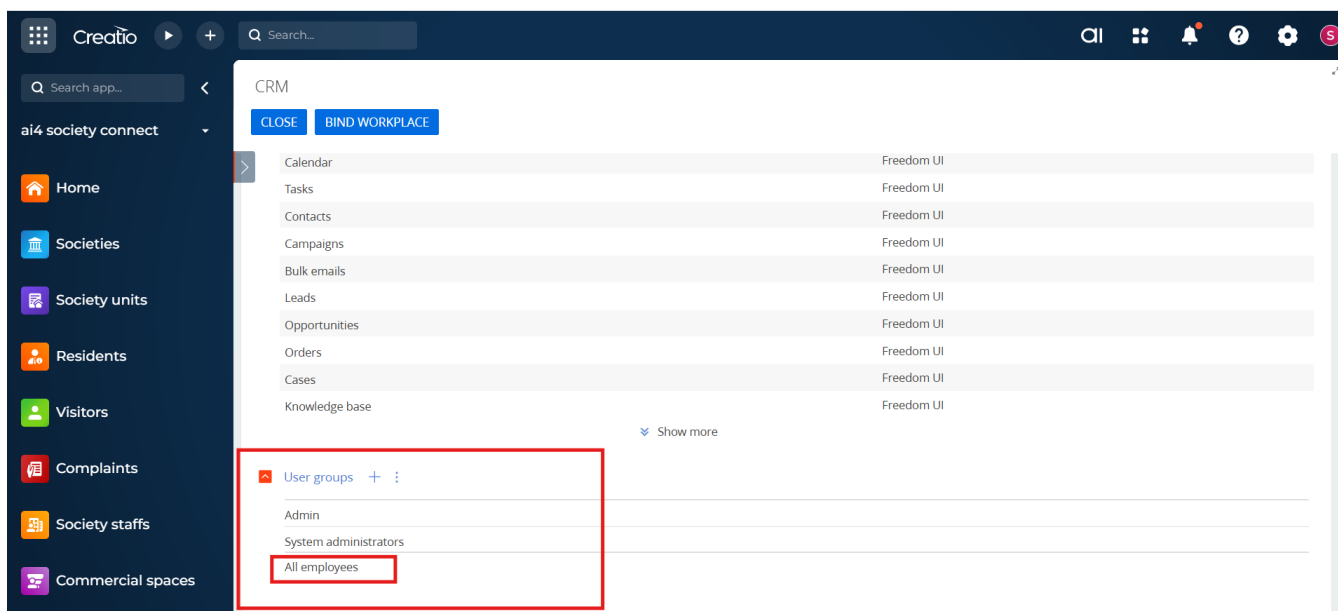
- Service
- Marketing
- Contact center

Steps to Configure

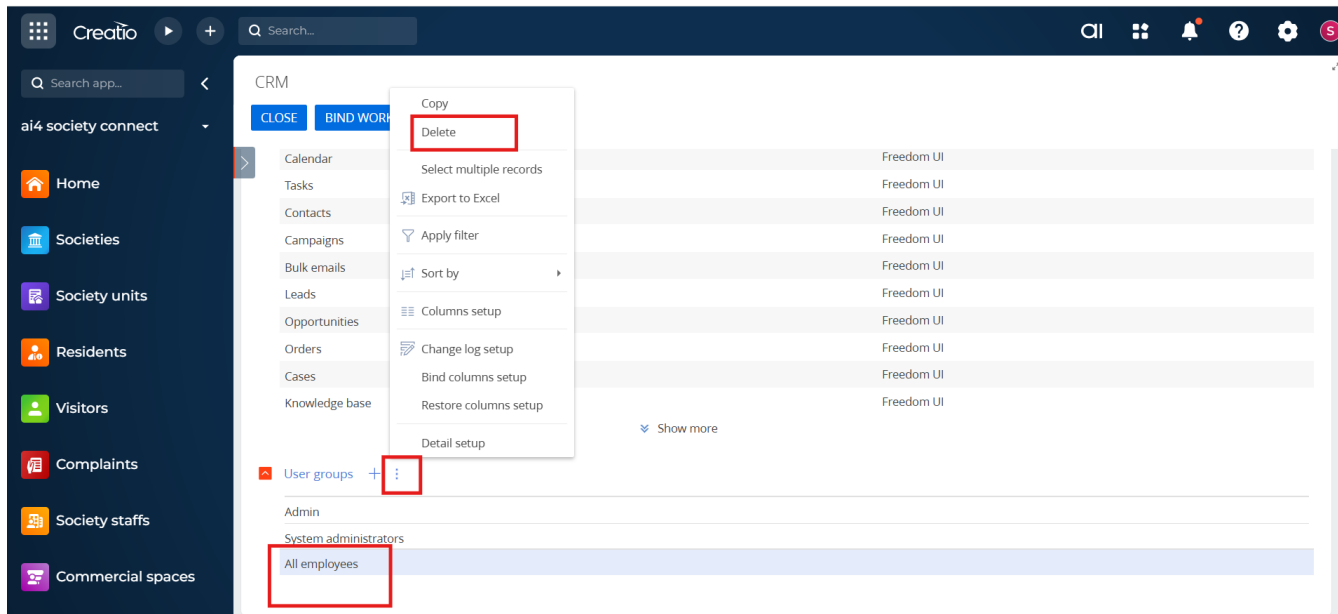
1. Log in using a **System Administrator** account.
2. Navigate to **Studio** → **Workplaces**.



3. Open each of the above OOTB workplaces.
4. Navigate to the **User Groups** tab.
5. Remove the **All Employees** organizational role.



6. To delete the All employees role in the user groups, Select the All employees role, then click on 3 dots icon then select delete option.



7. Save the changes.

8. Repeat the above steps for all listed OOTB workplaces.

Note: This is a **one-time configuration**. The **Admin** role required for the Ai4 Society Connect application is already configured and will continue to have access to the required workplaces.

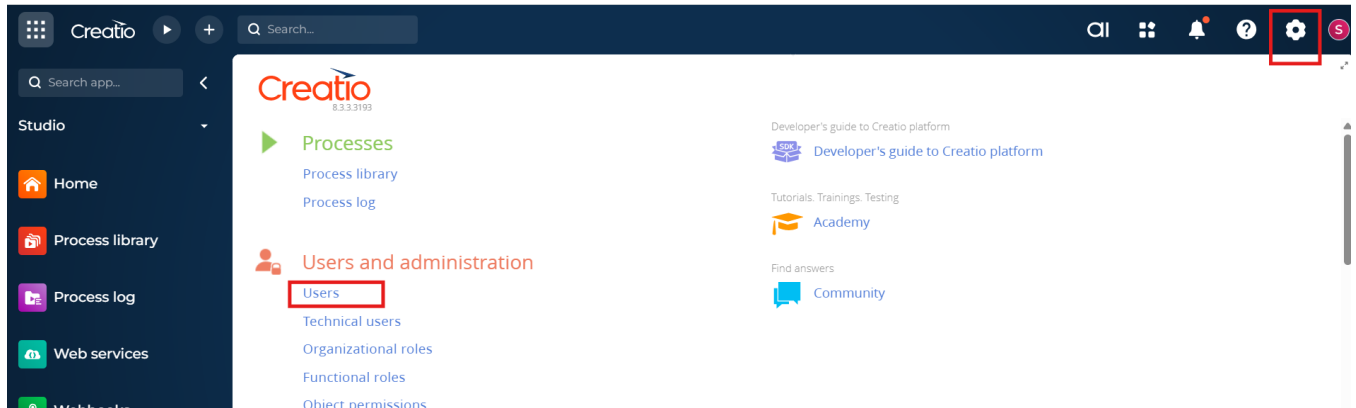
5. Administrator Guide

Before using the Administrator module, a user account must be created and assigned to the Admin role. Only users with the Admin role can access all sections and perform administrative operations within the Ai4 Society Connect application.

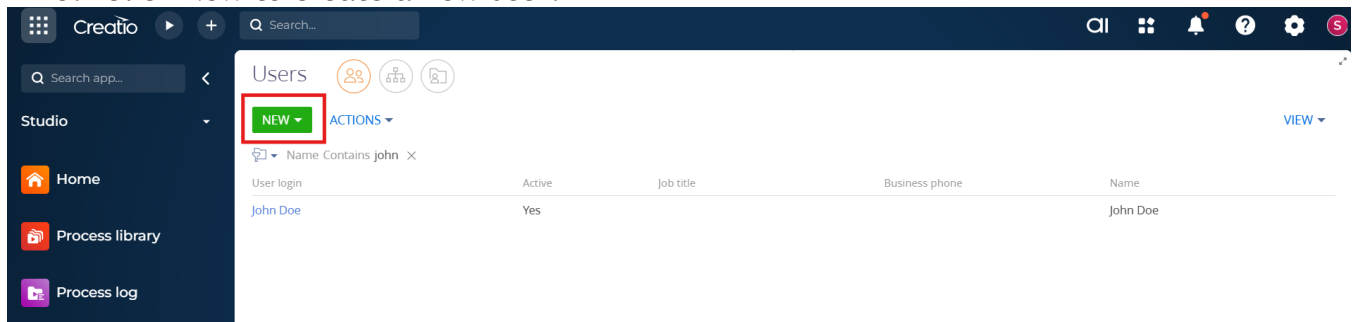
Creating an Administrator User:

Follow the steps below to create an Administrator user:

1. Navigate to System Designer.
2. Click Users.



3. Click New to create a new user.



4. Enter the required user information, including:
 - User Name
 - Contact
 - Email Address
 - Password (or follow your organization's password policy)
5. Save the user record.
6. Open the newly created user.
7. Navigate to the Roles tab, Under the Functional role
8. Add the user to the Admin role.
9. Save the changes.

Supervisor

[CLOSE](#) [DELETE](#)

>

 Contact* [Supervisor](#) Culture* [en-US](#)

Type* [Company employee](#) Date and time format

Active ☒ Time Zone

Home page First day of the week

< GENERAL INFORMATION **ROLES** LICENSES RIGHTS DELEGATION ACCESS RULES >

 Organizational roles + :

Role

[System administrators](#)

[All employees](#)

 Functional roles + :

Role

[Admin](#)

After assigning the Admin role, the user can log in using the assigned credentials and will have access to all application sections and administrative functionalities.

5.1 Administrator Overview

The Administrator is the primary user responsible for managing society operations within the ai4 society connect application. After logging in, the administrator has access to all sections and can perform activities related to society management, resident onboarding, visitor tracking, complaint management, billing, payments, staff administration, and communication.

The following sections explain each module available to the administrator and its purpose within the application.

5.2 Societies

The Societies section serves as the foundation of the application and is used to maintain information about residential societies managed through Ai4 society connect.

Before managing residents, units, invoices, or visitors, the administrator must first create the society record.

5.2.1 Society List Page

Society name	Status of society	Builders	Address	City	State	PIN code
1 Green Valley Residency	Active	PLR constructions	12/144,Kadapa	Kadapa	AP	516267
2 Lakeview Heights	Active	Hifi Builders	Sector 62, Golf Course Road	Gurugram	Haryana	122011
3 Sunshine Residency	Active	Aditya Constructions	Hinjewadi Phase-2	Pune	Maharashtra	411057
4 Green Meadows Residency	Active	Green	Plot 21, Nizampet Main Road	Hyderabad	Telangana	500090
5 Blue Sky Apartments	Active	Nature Constructions	Bannerghatta Road	Bengaluru	Karnataka	560076

- The Society List page displays all societies available in the application.
- Administrators can review existing societies, search for a specific society, and create new society records when required.

5.2.2 Society form page

The screenshot shows the 'Society form page' for 'Green Valley Residency'. The page has a dark blue sidebar on the left with a search bar and a list of menu items: Societies, Society units, Residents, Visitors, Complaints, Society staffs, Commercial spaces, and Society invoices. The main content area is white and titled 'Green Valley Residency'. It features a 'Society name' field with the value 'Green Valley Residency' and a 'Status of society' field with the value 'Active'. Below these fields are two tabs: 'GENERAL INFORMATION' and 'STAFF DETAILS'. The 'GENERAL INFORMATION' tab is active and displays a form with two sections: 'Society details' and 'Contact details'. The 'Society details' section includes fields for 'Builders' (PLR constructions), 'Address' (12/144, Kadapa), 'State' (AP), 'Web URL' (greenvalley.mysocietyconnect.com), 'City' (Kadapa), and 'PIN code' (516267). The 'Contact details' section includes fields for 'Contact person name' (Bal reddy), 'Phone number' (7657654567), 'Email address' (Bal.Peddi0@gmail.com), and 'Alternate phone (optional)' (6543654323).

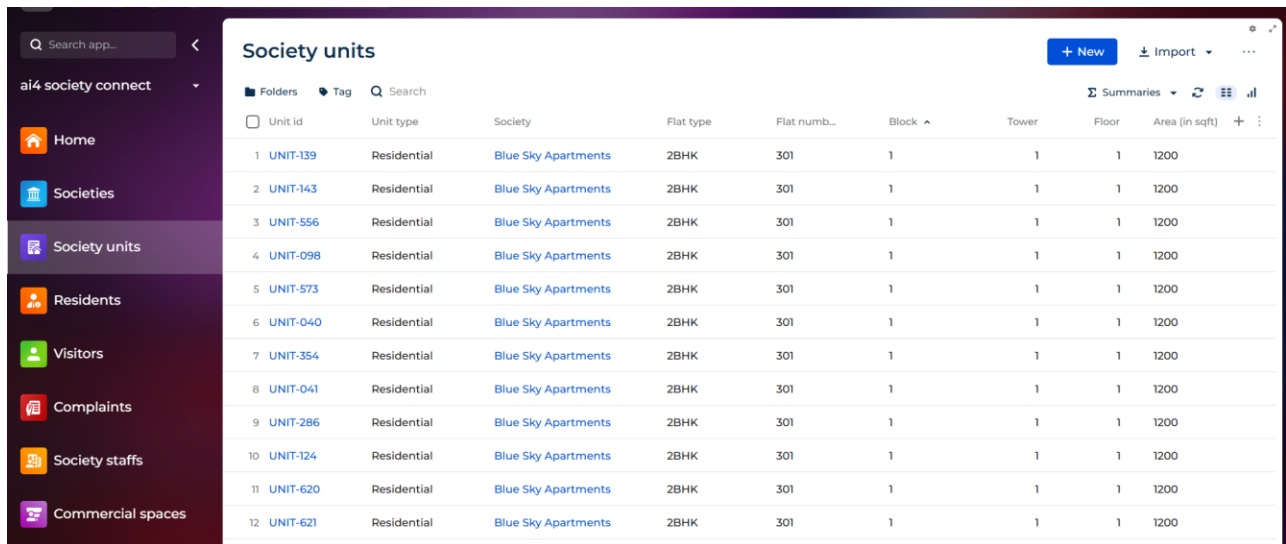
- The Society Form page contains detailed information about a society, including its name and other administrative information.
- This information is referenced throughout the application when creating units, residents, invoices, and other society-related records.
- And also it maintains the staff details who are working the society

5.3 Society units

The Society units section is used to manage residential units and commercial units belonging to a society. Each unit is maintained within this section and linked to a specific society.

5.3.1 Society units List Page

- The Society units List page displays all units available within the managed societies.
- Administrators can search, review, and maintain unit records from this page.



Unit id	Unit type	Society	Flat type	Flat numb...	Block	Tower	Floor	Area (in sqft)
1 UNIT-139	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
2 UNIT-143	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
3 UNIT-556	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
4 UNIT-098	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
5 UNIT-573	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
6 UNIT-040	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
7 UNIT-354	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
8 UNIT-041	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
9 UNIT-286	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
10 UNIT-124	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
11 UNIT-620	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200
12 UNIT-621	Residential	Blue Sky Apartments	2BHK	301	1	1	1	1200

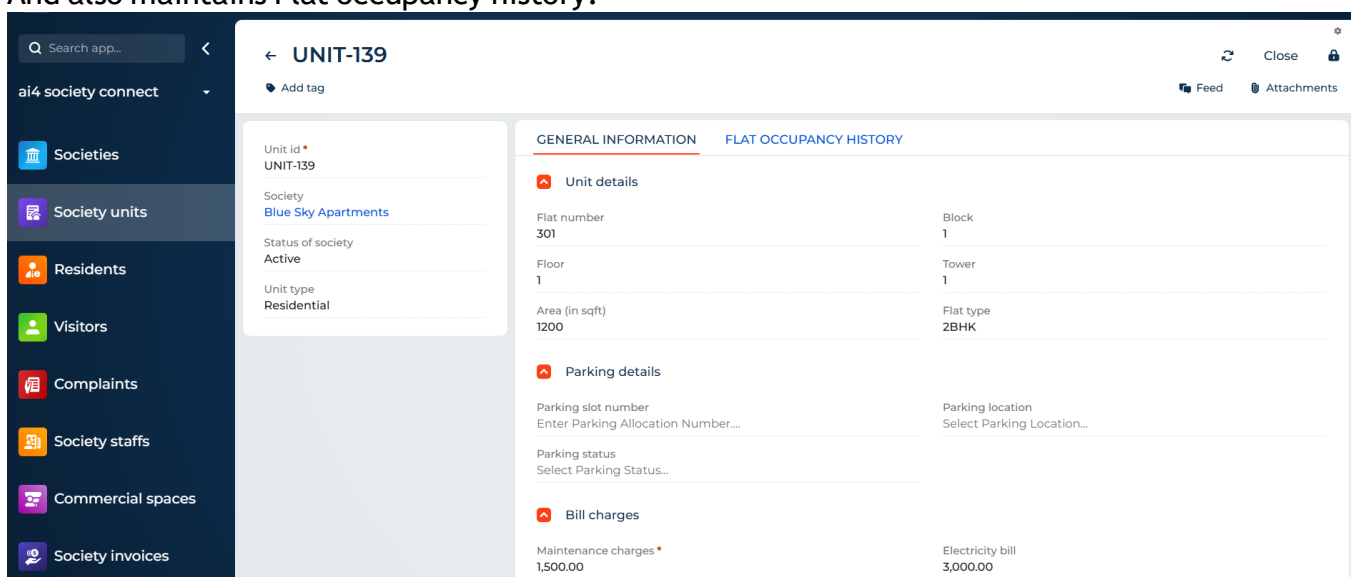
5.3.2 Society units form page

The Society unit Form page is used to maintain detailed information about a residential/commercial unit.

These units are later associated with residents or shops during the resident/shop registration and onboarding process.

Maintaining accurate unit information ensures proper resident allocation, visitor management, and invoice generation.

And also maintains Flat occupancy history.



Unit id
UNIT-139
Society
Blue Sky Apartments
Status of society
Active
Unit type
Residential

GENERAL INFORMATION

FLAT OCCUPANCY HISTORY

Unit details

Flat number
301

Block
1

Floor
1

Tower
1

Area (in sqft)
1200

Flat type
2BHK

Parking details

Parking slot number
Enter Parking Allocation Number...

Parking location
Select Parking Location...

Parking status
Select Parking Status...

Bill charges

Maintenance charges
1,500.00

Electricity bill
3,000.00

5.4 Residents

The Residents section contains information about all registered residents within the society.

Resident records are automatically created after registration requests submitted through the resident portal are approved by the administrator.

5.4.1 Residents List Page

Resident name	Resident type	Status	Phone number	Email address	Society	Unit
1 Harish	Owner	Approved	8688922349	indhumuriharish@gm...	Sunshine Residency	UNIT-101
2 Avinash	Owner	Approved	98764r5	Aci@gmail.com	Green Valley Reside...	UNIT-048
3 Sheik	Owner	Approved	87678767889	Sheik@gmail.com	Hifi_Appartments	UNIT-003

- The Residents List page provides a centralized view of all residents registered within the society.
- Administrators can review resident records, search for specific residents, and monitor resident-related activities.
- And also Administrators can Generate the monthly invoice with fixed charges to residents by selecting the residents record and click on the Generate invoice button. Which will create an invoice to residents and sends an email with the invoice attachment.

5.4.2 Residents Form page

The screenshot displays the 'Residents Form' page for a resident named Harish. The page is divided into two main sections: 'Resident info' on the left and 'GENERAL INFORMATION' on the right. The 'Resident info' section includes a profile picture, name, phone number, email address, resident type, status, and contact information. The 'GENERAL INFORMATION' section includes society details, builders, address, state, status of society, unit details, and a web link. The page also features a sidebar with navigation options and a top bar with search and settings icons.

Field	Value
Resident name	Harish
Phone number	8688922349
Email address	indhumiharish@gmail.com
Resident type	Owner
Status	Approved
Contact	Harish
Society	Blue Sky Apartments
Builders	Nature Constructions
Address	Bannerghatta Road
State	Karnataka
Status of society	Active
Unit	UNIT-139
Web link	bluesky.mysocietyconnect.com
City	Bengaluru
PIN code	560076

5.4.2.1 The Resident Form page provides detailed information about an individual resident, including personal details, unit information, family members, vehicles, domestic staff, invoices, complaints, and visitor-related activities.

5.4.2.2 This section helps administrators maintain a complete resident profile and manage resident-related operations efficiently.

5.5 Visitors

The Visitors section is used to manage and monitor visitor activities within the society. All visitor entries, approvals, check-ins, and check-outs are maintained in this section.

5.5.2 Visitors List Page

The screenshot displays the 'Visitors List' page, which contains a table of visitor records. The table has columns for Visitor ID, Visitor name, Approval status, Visit date, Check-in time, Check-out time, and Visiting resident. The records show various visitors with their respective approval statuses and visit details.

Visitor ID	Visitor name	Approval status	Visit date	Check-in time	Check-out time	Visiting resident
VSTR ID - 00046		Pending	7/15/2026	5:15 PM		Harish
VSTR ID - 00004	Harish	Pending	7/14/2026			Harish
VSTR ID - 00026	Michael	Approved	7/15/2026	1:53 PM		Harish
VSTR ID - 00039		Pending	7/15/2026	2:55 PM		Avinash
VSTR ID - 00006	Harish	Pending	7/14/2026			Harish
VSTR ID - 00033	Michael	Approved	7/15/2026	2:07 PM	4:37 PM	Harish
VSTR ID - 00032		Pending	7/15/2026	2:01 PM		Harish
VSTR ID - 00045	Raj	Approved	7/15/2026	5:15 PM		Harish

- 5.5.2.1** The Visitors List page displays all visitors who have entered or requested access to the society.
- 5.5.2.2** Administrators can review visitor records and monitor visitor movement across the community.

5.5.3 Visitors Form Page

The screenshot displays the 'VSTR ID - 00025' visitor form. On the left, a sidebar contains navigation options: 'Security workplace', 'Visitors' (selected), and 'Society staffs'. The main content area is divided into two sections. The left section, titled 'Visitor info', contains a profile picture of a man, the visitor ID 'VSTR ID - 00025', the name 'Harish', a phone number '8688922349', and the visit date '7/15/2026'. Below this, the 'Approval status' is 'Pending' and the 'Visit status' is 'Not Arrived'. The right section, titled 'GENERAL INFORMATION', contains fields for 'Visit type' (Walk-in), 'Visiting resident' (Harish), 'Purpose of visit' (Describe Purpose of Visit...), 'Check-in time', and 'Check-out time'. At the top right, there are buttons for 'Request approval', 'Close', 'Feed', and 'Attachments'.

- 5.5.3.1** The Visitor Form page provides detailed information about individual visitors, including visitor type, visiting resident, approval status, check-in time, and check-out time.
- 5.5.3.2** This section provides complete visibility into visitor activities and helps ensure secure visitor management.

5.6 Society staffs

The Society Staffs section is used to maintain records of staff members working within the society, such as security personnel, housekeeping staff, maintenance personnel, and other operational staff.

5.6.2 Society staffs List Page

The Society Staffs List page displays all staff records maintained within the application.

Society staffs							
Search app... ai4 society connect Home Societies Society units Residents Visitors Complaints Society staffs Commercial spaces + New Import Summaries Refresh Filter Sort							
Staff name	Phone number	Email address	Staff status	Staff type	Society	Joining	
1 Ajay	9543201234	ajay.hk@gmail.com	Active	HouseKeeping	Green Valley Reside...	4/10/2026	
2 Anil Sharma	9765432109	anil.sec@gmail.com	Inactive	Security	Green Valley Reside...	4/7/2026	
3 Arjun	9109876543	arjun.sec@gmail.com	Active	Security	Blue Sky Apartments	4/8/2026	
4 Dinesh	9654301234	dinesh.tech@gmail.com	Active	Technician	Lakeview Heights	4/8/2026	
5 Harish	9987654321	harish.hk@gmail.com	Active	HouseKeeping	Sunshine Residency	4/7/2026	
6 Kamil	212458	shaikmk2838@gmail.com	Active	Technician	Hifi_Apartments	6/5/2026	
7 Kiran Kumar	9871234567	kiran.tech@gmail.com	Active	Manager	Blue Sky Apartments	4/9/2026	
8 Lokesh	9876501234	lokesh.tech@gmail.com	Inactive	Technician	Green Meadows Res...	4/8/2026	
9 Mahesh Yadav	9012345678	mahesh.hk@gmail.com	Active	HouseKeeping	Blue Sky Apartments	4/9/2026	
10 Manoj	9765401234	manoj.sec@gmail.com	Active	Security	Green Meadows Res...	4/10/2026	
11 MDM_202606221311...	9931153740	mdm_20260622131153740@yopmail.com	Active	Technician	Sunshine Residency	6/22/2026	
12 MDM_202606221313...	9931304656	mdm_20260622131304656@yopmail.co...	Active	Technician	Sunshine Residency	6/22/2026	

5.6.3 Society staffs Form Page

- 5.6.3.1 The Society staff Form page contains detailed information about staff members and their attendance records.
- 5.6.3.2 Administrators can review attendance activities and maintain accurate staff information.
- 5.6.3.3 This section helps the society efficiently manage workforce-related information.

Search app...

ai4 society connect

Home

Societies

Society units

Residents

Visitors

Complaints

Society staffs

← Harish

Add tag

Feed

Attachments

Personal information



Staff name
Harish

Phone number
8688922349

Email address
indhumuriharish@gmail.com

Address
4-8/5/1, chitkul, near shivalayam

GENERAL INFORMATION

ATTENDANCE TRACKING

Professional information

Society
Blue Sky Apartments

Staff status
Active

Staff type
Technician

Service type
Maintenance

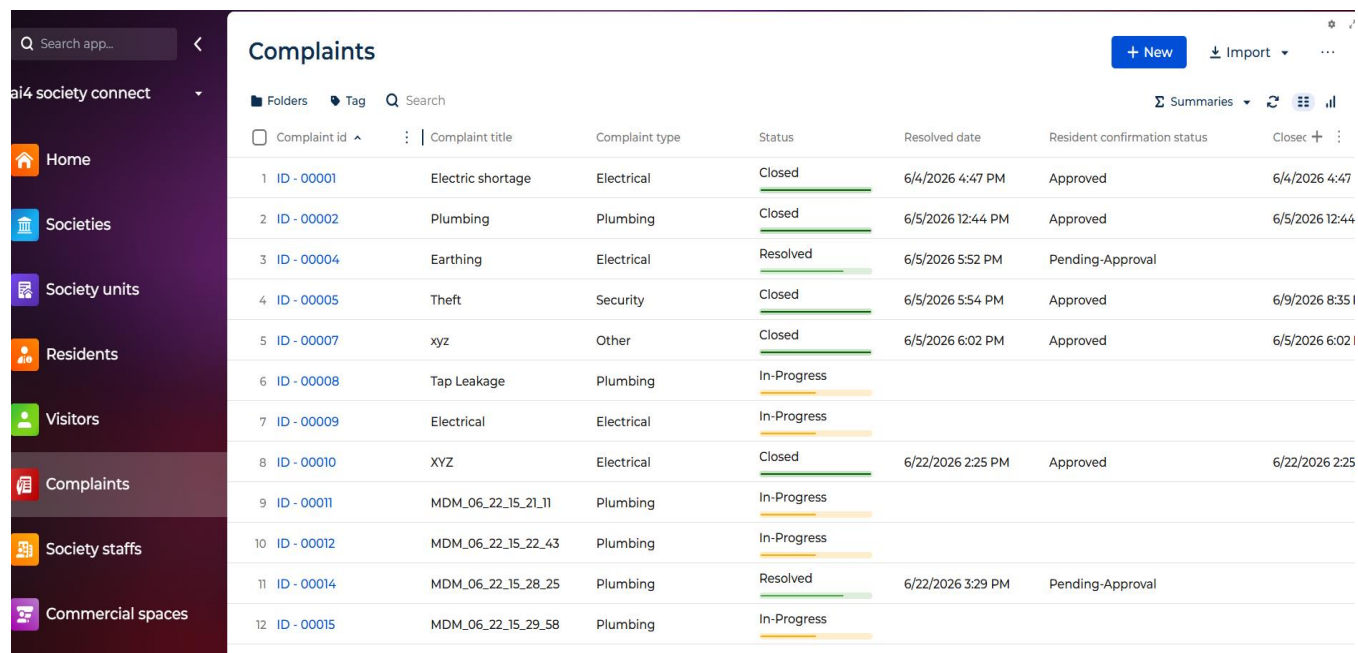
Joining date
7/1/2026

5.7 Complaints

The Complaints section enables administrators to manage service requests and complaints raised by residents.

5.7.2 Complaints List Page

The Complaints List page displays all complaints submitted by residents. Administrators can monitor complaint status and track ongoing pending service requests.



Complaint id	Complaint title	Complaint type	Status	Resolved date	Resident confirmation status	Close
1 ID - 00001	Electric shortage	Electrical	Closed	6/4/2026 4:47 PM	Approved	6/4/2026 4:47
2 ID - 00002	Plumbing	Plumbing	Closed	6/5/2026 12:44 PM	Approved	6/5/2026 12:44
3 ID - 00004	Earthing	Electrical	Resolved	6/5/2026 5:52 PM	Pending-Approval	
4 ID - 00005	Theft	Security	Closed	6/5/2026 5:54 PM	Approved	6/9/2026 8:35 I
5 ID - 00007	xyz	Other	Closed	6/5/2026 6:02 PM	Approved	6/5/2026 6:02 I
6 ID - 00008	Tap Leakage	Plumbing	In-Progress			
7 ID - 00009	Electrical	Electrical	In-Progress			
8 ID - 00010	XYZ	Electrical	Closed	6/22/2026 2:25 PM	Approved	6/22/2026 2:25
9 ID - 00011	MDM_06_22_15_21_11	Plumbing	In-Progress			
10 ID - 00012	MDM_06_22_15_22_43	Plumbing	In-Progress			
11 ID - 00014	MDM_06_22_15_28_25	Plumbing	Resolved	6/22/2026 3:29 PM	Pending-Approval	
12 ID - 00015	MDM_06_22_15_29_58	Plumbing	In-Progress			

5.7.3 Complaints Form Page

- 5.7.3.1 The Complaint Form page contains detailed information about a complaint, including complaint category, description, current status, and resolution information.
- 5.7.3.2 Once a complaint is resolved, the administrator can Click on the button **(Mark as resolved)** which will update the status to resolved and initiate the resident confirmation process before the complaint is officially closed.
- 5.7.3.3 Based on the performed actions it will update the status to resolved/closed as well updates the resolved time and closed time.
- 5.7.3.4 This workflow ensures transparency and accountability throughout the complaint resolution process.

Search app...

ai4 society connect

Home

Societies

Society units

Residents

Visitors

Complaints

Society staffs

Commercial spaces

ID - 00004

Mark as resolved

Close

Feed

Attachments

Next Steps

New

In-Progress

Resolved

Closed

Complaint id
ID - 00004

Complaint title
Enter the Title of the Complaint...

Complaint type
Select Complaint Type...

Created on
7/13/2026 7:15 PM

Priority
Select Priority..

Status
Closed

Resident confirmation status

GENERAL INFORMATION

Description
Please Describe your Complaint....

Resolved date

Closed date

5.8 Commercial spaces

The Commercial Spaces section is used to maintain information about commercial establishments operating within the society premises.

5.8.2 Commercial spaces List Page

Search app...

ai4 society connect

Home

Societies

Society units

Residents

Visitors

Complaints

Society staffs

Commercial spaces

Commercial spaces

+ New

Generate invoice

Import

Summaries

Commercial space id

Shop name

Owner name

Phone number

Email address

Shop type

1	ID-00018	HVAD Restaurant	Kalyan	7776665554	Kalyan@gmail.com	Restaurant
2	ID-00017	DHI Saloon	Satyam	8703456789	Satyam@gmail.com	Salon
3	ID-00016	KAR Groceries	Abhinaya	9392619336	Abhinaya@gmail.com	Grocery
4	ID-00015	IHV Medicals	Vaishnavi	9182701071	Vaishnavi@gmail.com	Medical
5	ID-00014	HN Groceries	Ajay	8179918995	Ajay@gmail.com	Grocery
6	ID-00013	PBR laundry	Akshith	7989202188	Akshith@gmail.com	Laundry
7	ID-00012	AK Bar & Restaurant	Abhi	9703722299	Abhi@gmail.com	Restaurant
8	ID-00011	Haritha Beauty & Saloons	Haritha	6667778889	Haritha@gmail.com	Salon
9	ID-00010	Fresh Market	Shaik	9876098765	shaik@gmail.com	Grocery
10	ID-00009	Harish Bar & Restaurant	Naveen	9951991439	indhumurinaveen@gmail.com	Restaurant
11	ID-00008	Deepak restaurant	Deepak	7686789687	Deepak@gmail.com	Restaurant
12	ID-00007	Venkateshwara Gorceries	Sheik	9876090986	Sheik@gmail.com	Grocery

26°C Sunny

Search

8:33 AM 7/14/2026

The Commercial Spaces List page provides a consolidated view of all commercial units maintained within the application.

5.8.2.1 And also Administrators can Generate the monthly invoice with fixed charges to shops by selecting the shops record and click on the Generate invoice button. Which will create an invoice to shops and sends an email with the invoice attachment.

5.8.3 Commercial spaces Form Page

Commercial space id *
ID-00009

Shop name
Harish Bar & Restaurant

Owner name
Naveen

Email address
indhumurinaveen@gmail.com

Phone number
9951991439

Unit
UNIT-071

GENERAL INFORMATION INVOICES

Shop type
Restaurant

Status
Active

Address
Enter Address...

- 5.8.3.1 The Commercial Space Form page contains detailed information about commercial units, including ownership and occupancy details.
- 5.8.3.2 This section helps administrators manage commercial properties separately from residential units.
- 5.8.3.3 And also helps tracking of the invoices generated to the units.

5.9 Society invoices

The Invoices section is responsible for managing society billing activities. Administrators generate invoices for residents and commercial units based on applicable charges.

5.9.2 Society invoices List Page

The Invoices List page displays all generated invoices and their current status.

Society invoices

+ New Import

Summaries

Invoice number	Invoice date	Invoice type	Status	Due date	Total amount	Total tax amount	Total amount (inc)
1 INV-00004	7/13/2026	Monthly	Pending	7/18/2026	7,900.00	894.00	8,794.00
2 INV-00005	7/13/2026	Monthly	Partially Paid	7/18/2026	7,900.00	894.00	8,794.00

+ New

5.9.3 Society invoices Form Page

Search app... <

ai4 society connect >

Home

Societies

Society units

Residents

Visitors

Complaints

Society staffs

Commercial spaces

← INV-00005

Close

Add tag

Feed

Attachments

Pending

Partially Paid

Paid

Basic info

Invoice number *
INV-00005

Status
Partially Paid

Invoice type
Monthly

Invoice date
7/13/2026

Due date
7/18/2026

Unit type
Residential

Resident
Harish

GENERAL INFORMATION

PAYMENT DETAILS

Invoice charges + ↺ ⋮ Q

☐ Invoice	Charge type	Amount	Taxable amount	Amount (incl.tax)	+ ⋮
1 INV-00005	Gas Bill	1,000.00	180.00	1,180.00	
2 INV-00005	Maintenance	1,500.00	150.00	1,650.00	
3 INV-00005	Water Bill	400.00	24.00	424.00	
4 INV-00005	Parking Charges	2,000.00	0.00	2,000.00	

Grand total

Total amount
7,900.00

Total tax amount
894.00

Total amount (incl.tax)
8,794.00

26°C Sunny

Search

8:39 AM 7/14/2026

The Invoice Form page contains complete billing information, including maintenance charges, utility charges, taxes, payment information, and invoice status.

Administrators can monitor invoice progress and track whether invoices are pending, partially paid, or fully paid.

Administrators can create a new invoice by navigating to the Invoices section and clicking the **New** button on the Invoice List page.

Search app... <

ai4 society connect >

Home

Societies

Society units

Residents

Visitors

Complaints

Society staffs

Commercial spaces

← INV-00005

Close

Add tag

Feed

Attachments

Pending

Partially Paid

Paid

Basic info

Invoice number *
INV-00005

Status
Partially Paid

Invoice type
Monthly

Invoice date
7/13/2026

Due date
7/18/2026

Unit type
Residential

Resident
Harish

GENERAL INFORMATION

PAYMENT DETAILS

Invoice charges + ↺ ⋮ Q

☐ Invoice	Charge type	Amount	Taxable amount	Amount (incl.tax)	+ ⋮
1 INV-00005	Gas Bill	1,000.00	180.00	1,180.00	
2 INV-00005	Maintenance	1,500.00	150.00	1,650.00	
3 INV-00005	Water Bill	400.00	24.00	424.00	
4 INV-00005	Parking Charges	2,000.00	0.00	2,000.00	

Grand total

Total amount
7,900.00

Total tax amount
894.00

Total amount (incl.tax)
8,794.00

26°C Sunny

Search

8:39 AM 7/14/2026

On the Invoice Form page, the administrator enters the required invoice information, such as the society unit, invoice details, billing period, due date, and other relevant information.

To add invoice charges, the administrator can go to the **Invoice Charges** detail and click the **+** button. This will navigate to the invoice Charges Page

The screenshot shows the 'New record' page for adding invoice charges. On the left is a dark blue sidebar with the 'ai4 society connect' logo and a list of menu items: Residents, Visitors, Complaints, Society staffs, Commercial spaces, Society invoices, Payments, and Announcements. The main content area is titled 'New record' and includes a 'Save' button, a 'Cancel' button, and a 'Feed' button. Below the title is a 'Charge type' dropdown menu with the text 'Select Charge Type...'. The main form area is titled 'GENERAL INFORMATION' and contains several input fields: 'Amount' (with a placeholder 'Enter Amount...'), 'CGST (%)', 'CGST amount', 'SGST (%)', 'SGST amount', 'Taxable amount', and 'Amount (incl.tax)'. The bottom of the screen shows a macOS taskbar with various application icons and a system clock displaying '8:41 AM'.

The Invoice Charges page is used to capture individual charges that make up the invoice. The administrator can enter:

- Charge Type
- Charge Amount
- CGST Percentage
- SGST Percentage

Based on the values entered, the system automatically calculates:

- CGST Amount
- SGST Amount
- Amount Including Tax

After entering the required information, the administrator clicks **Save** to add the charge to the invoice.

Multiple charge records can be added to the invoice as required. As charges are added, the

application automatically calculates and updates:

- Total Amount
- Total Tax Amount
- Total Amount Including Tax

These calculated values are displayed on the Invoice Form page, providing a complete billing summary.

Once all invoice details and charges have been added, the administrator clicks **Save** on the Invoice Form page to generate the invoice.

The invoice is then created and associated with the selected society unit, making it available for the resident to review and submit payment through the resident portal.

5.10 Payments

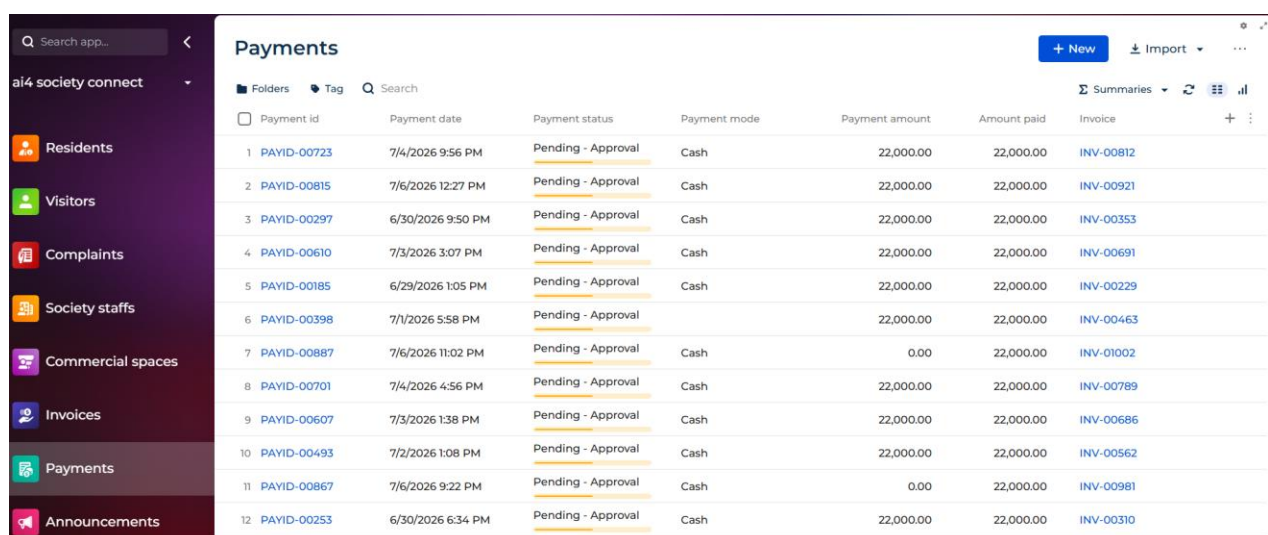
The Payments section is used to review and manage payments submitted by residents against invoices.

5.10.1 Payments List Page

The Payments List page displays all payment transactions recorded within the application.

Administrator Can review the Payments by status. If any Pending-Approval Payments are displayed.

Then Administrator can review the details and approve or reject the payment.



Payment id	Payment date	Payment status	Payment mode	Payment amount	Amount paid	Invoice
1 PAYID-00723	7/4/2026 9:56 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00812
2 PAYID-00815	7/6/2026 12:27 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00921
3 PAYID-00297	6/30/2026 9:50 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00353
4 PAYID-00610	7/3/2026 3:07 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00691
5 PAYID-00185	6/29/2026 1:05 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00229
6 PAYID-00398	7/1/2026 5:58 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00463
7 PAYID-00887	7/6/2026 11:02 PM	Pending - Approval	Cash	0.00	22,000.00	INV-01002
8 PAYID-00701	7/4/2026 4:56 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00789
9 PAYID-00607	7/3/2026 1:38 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00686
10 PAYID-00493	7/2/2026 1:08 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00562
11 PAYID-00867	7/6/2026 9:22 PM	Pending - Approval	Cash	0.00	22,000.00	INV-00981
12 PAYID-00253	6/30/2026 6:34 PM	Pending - Approval	Cash	22,000.00	22,000.00	INV-00310

5.10.2 Payments Form Page

Search app... < PAYID-00007

ai4 society connect Add tag

Feed Attachments

Pending - Approval Approved

Basic info

Payment id *
PAYID-00007

Resident
Harish

Invoice
INV-00004

Invoice status
Paid

Payment amount
8,894.00

Due amount
194.00

Payment information

Payment mode
UPI

Payment date
7/14/2026 5:56 PM

Amount paid
194.00

Reference id (trx no.)
123456787

Approvals

The Payment Form page contains payment information submitted by residents, including payment amount, payment method, transaction details, approval status, and related invoice information.

Administrators review submitted payments and approve them after verification. Once approved, invoice statuses are automatically updated based on the total amount paid.

5.11 Announcements

The Announcements section enables administrators to communicate important information to residents.

5.11.1 Announcements List Page

Announcement id	Announcement title	Announcement date	Posted by
1 ID-00001	Scheduled Power Maintenance	6/4/2026 4:50 PM	Supervisor
2 ID-00002	Annual Sports Day	6/5/2026 12:50 PM	Admin
+ New			

The Announcements List page displays all announcements created within the application.

5.11.2 Announcements Form Page

← ID-00003

Add tag

Announcement id * ID-00003

Announcement title Test Test

Announcement date 7/14/2026 6:05 PM

Status

Posted by Supervisor

GENERAL INFORMATION

Description Test Test Test-3

Publish

Close

Feed Attachments

The Announcement Form page is used to create and publish announcements such as maintenance notices, community updates, events, emergency alerts, and general society communications.

All Published announcements are visible to residents through their resident portal, ensuring effective communication across the society.

6 Resident User Guide

6.4 Resident Onboarding and Registration Process (Important)

The resident onboarding process is designed to ensure that only authorized residents gain access to the ai4 society connect application.

Unlike administrators and security personnel, residents are not provided direct access to the application by default. Instead, residents are assigned the **External Resident** role, which grants them the necessary access to initiate and complete the registration and onboarding process. Once the onboarding process is successfully completed, the resident's access is updated according to their assigned permissions within the application.

Resident Onboarding Prerequisite

Before residents can register in the application, the Society Administrator must create a temporary onboarding user and assign it to the External Resident role. This is a one-time setup activity performed during the initial application configuration.

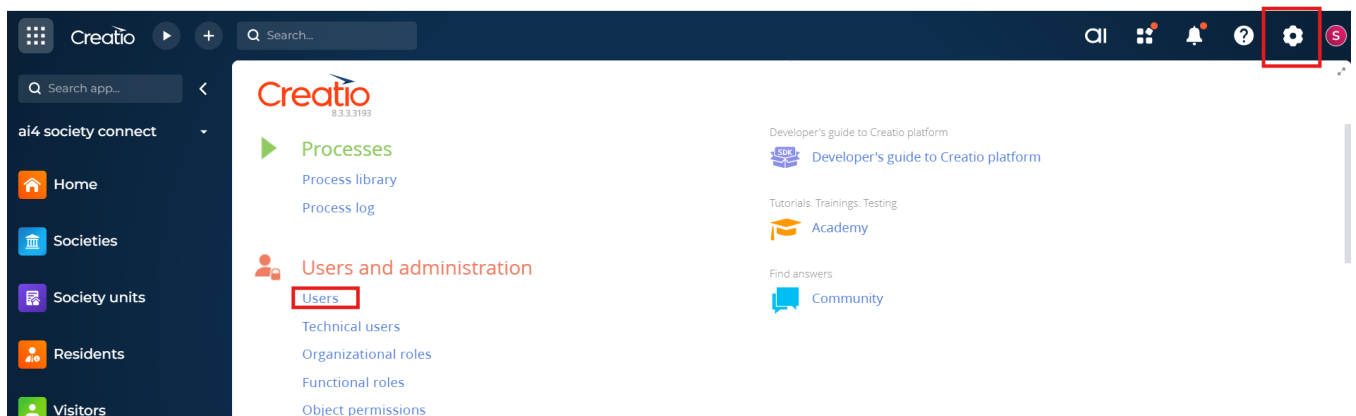
The credentials of this onboarding user are shared with every new resident who wishes to register in the application. These credentials are used only to access the Resident Registration page and submit the registration request.

Note: The onboarding user is created only once. The same credentials can be shared with all new residents for completing the registration process.

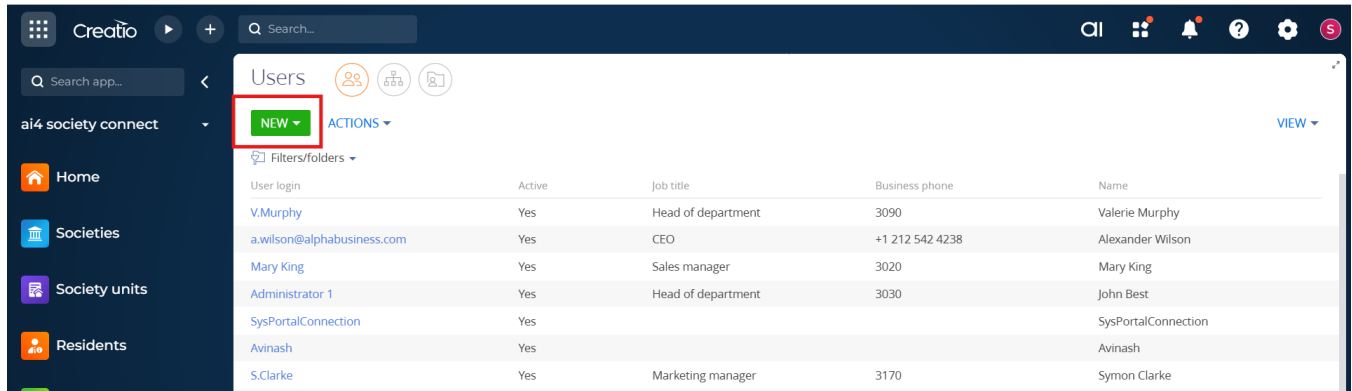
Creating the Temporary Onboarding External User

Follow the steps below to create the onboarding user:

1. Navigate to System Designer.
2. Click Users.



3. Click New to create a new user and select **External user**.



4. Enter the required user details, such as:

- User Name
- Contact
- Email Address
- Password (or follow your organization's password policy)

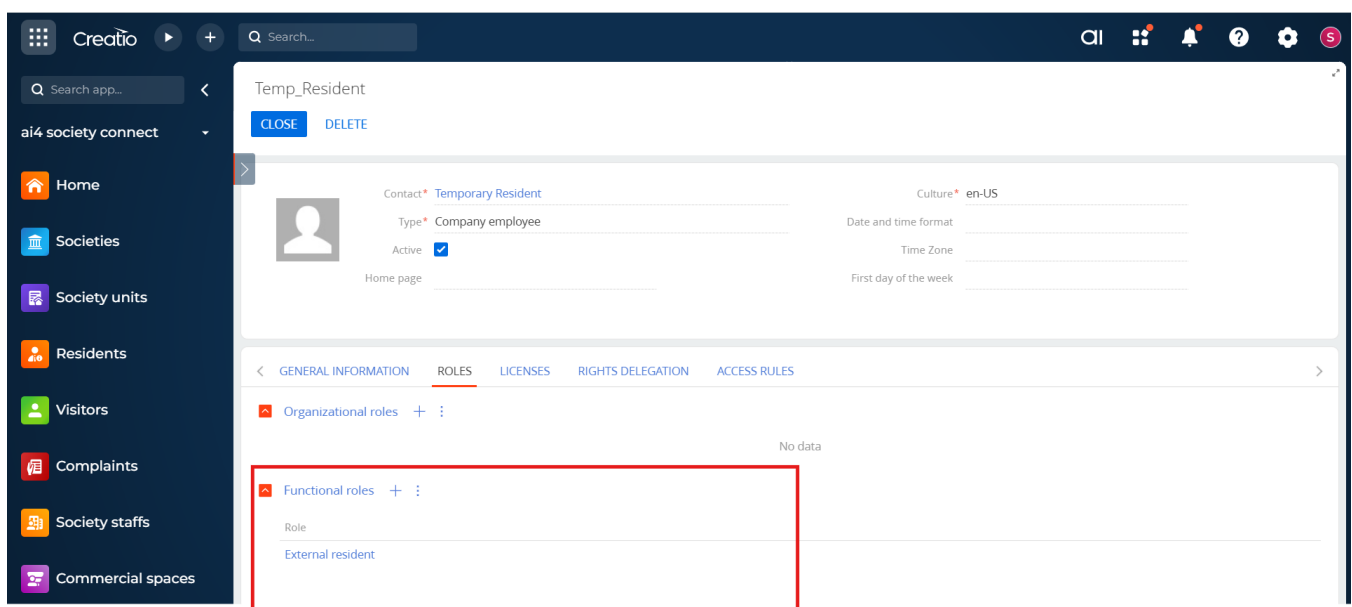
5. Save the user record.

6. Open the newly created user.

7. Navigate to the Roles tab.

8. Under the Functional roles, Add the user to the **External Resident** role.

9. Save the changes.



Note: This onboarding user is intended only for new resident registration and should not be used as a regular resident account.

And as a System administrator user, if you are using the licensed environment to use this application, then assign the following external licenses for the External Resident User to access the application.

License manager						Creatio	
CLOSE		ACTIONS ▾					
All licenses ▾		Q exter X					
Name ^	Type	Start date	Due date	Status	Total		
studio creatio external b2b portal cloud	Personal	10/29/2023	12/30/2026	Active	10		
studio creatio external b2c portal cloud	Personal	3/10/2024	12/30/2026	Active	10		
studio creatio external user cloud	Personal	10/30/2023	12/30/2026	Active	10		

After this section, continue with:

Share Temporary Login Credentials

When a new resident joins the society, the Society Administrator shares the temporary onboarding credentials along with the Resident Portal URL.

These credentials are used only to access the Resident Registration page and submit the registration request.

Step 1: Resident Login

After the **External Resident** account is created, login credentials are securely shared with the resident. The resident uses these credentials to sign in to the **Ai4 Society Connect** application, complete the onboarding process, and gain access based on the assigned resident role and permissions.



Username

Password

[Forgot your password?](#)

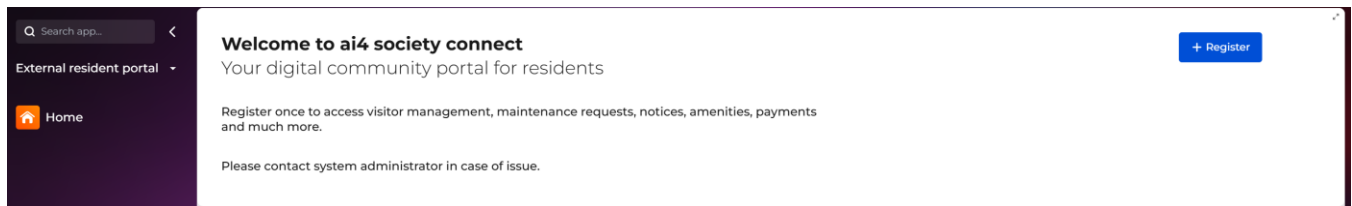
LOG IN



THE NO-CODE PLAYBOOK
A vendor-agnostic guide that empowers teams to deliver business applications of any complexity with no-code

DOWNLOAD NOW

After successful login, the resident is presented with the Home page where they need to click on Register button to navigate to registration page.



Step 2: Complete Resident Registration

On the registration page, the resident is required to provide the necessary information, including:

- Profile Photo
- Resident Name
- Mobile Number
- Email address
- Resident Type (Owner or Tenant)
- Society
- Society Unit

When a society is selected, the application automatically displays only the units associated with that particular society. This ensures that residents can only register against valid units.

After entering all required information, the resident clicks the Register button to submit the registration request.

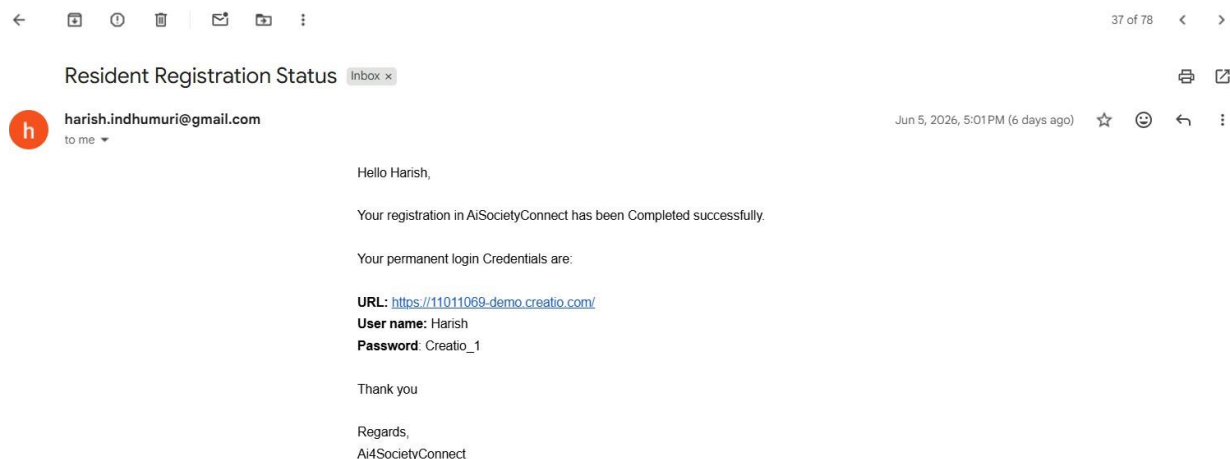
Step 3: Registration Approval Process

Once the registration request is submitted, it is routed to the administrator for review and approval.

The administrator verifies the information provided by the resident and either approves or rejects the request.

Upon approval:

- A Contact record is automatically created.
- A User account is automatically created.
- Login credentials are generated for the resident.
- An email notification containing login information is sent to the resident.



This automated process ensures secure and controlled onboarding of residents.

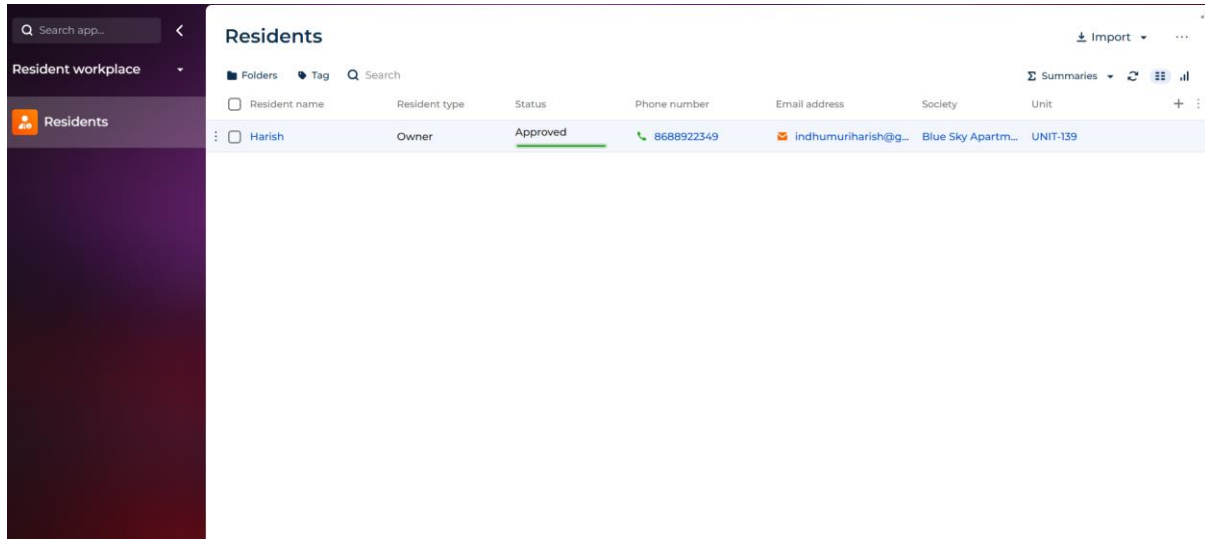
Step 4: Resident Login

After receiving the approved login credentials, the resident can log in to the ai4 society connect portal.

During the first login, the resident may reset their password and update account credentials as required.

Upon successful login, the resident is directed to the Resident Workplace.

Unlike administrators, residents have access only to their own information and activities. Residents cannot view or modify records belonging to other residents.



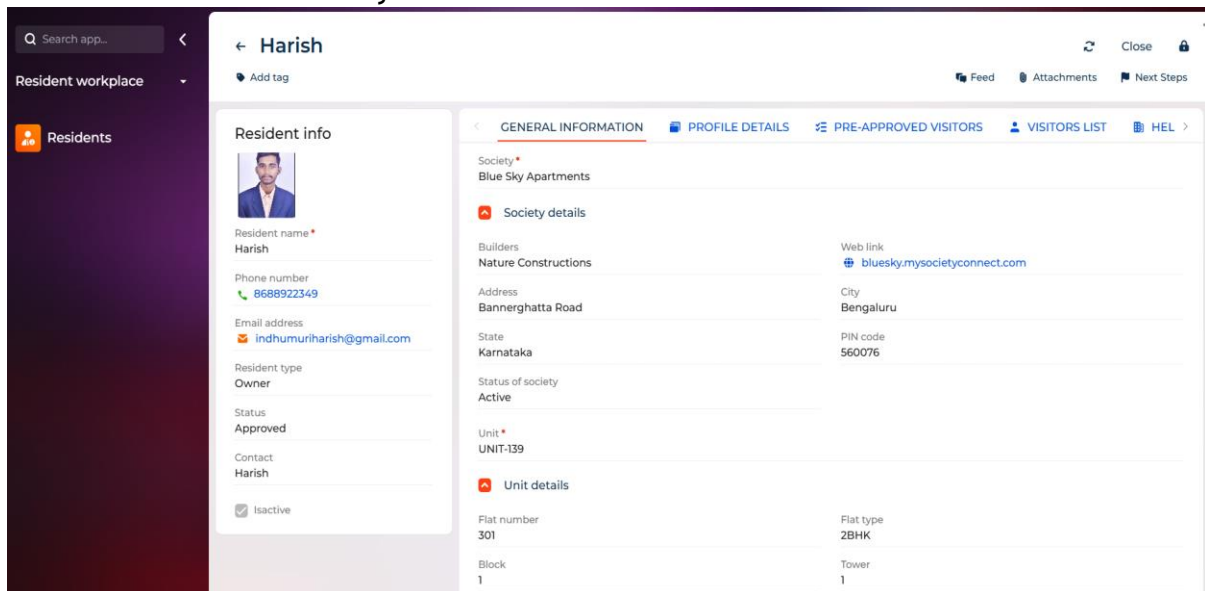
The screenshot shows a web application interface for managing residents. On the left is a dark sidebar with a search bar and a 'Residents' menu item. The main area is titled 'Residents' and contains a table with columns for Resident name, Resident type, Status, Phone number, Email address, Society, and Unit. A single resident, Harish, is listed with the status 'Approved'.

Resident name	Resident type	Status	Phone number	Email address	Society	Unit
Harish	Owner	Approved	8688922349	indhumuriharish@g...	Blue Sky Apartm...	UNIT-139

6.5 Resident Profile Management

After logging in, the resident can access the Residents section, which serves as the central location for managing all resident-related information.

The resident has access only to their own resident record.



The screenshot displays the profile management page for a resident named Harish. The page is divided into two main sections: 'Resident info' on the left and a detailed profile view on the right. The profile view includes tabs for 'GENERAL INFORMATION', 'PROFILE DETAILS', 'PRE-APPROVED VISITORS', 'VISITORS LIST', and 'HEL'. The 'GENERAL INFORMATION' tab is active, showing details about the resident's society (Blue Sky Apartments), address (Bannerghatta Road, Bengaluru), and unit (UNIT-139).

Resident info	
	
Resident name *	Harish
Phone number	8688922349
Email address	indhumuriharish@gmail.com
Resident type	Owner
Status	Approved
Contact	Harish
☒ Inactive	

GENERAL INFORMATION	
Society *	Blue Sky Apartments
Society details	
Builders	Nature Constructions
Web link	bluesky.mysocietyconnect.com
Address	Bannerghatta Road
City	Bengaluru
State	Karnataka
PIN code	560076
Status of society	Active
Unit *	UNIT-139
Unit details	
Flat number	301
Flat type	2BHK
Block	1
Tower	1

The resident record contains personal information and provides access to several related management areas, including:

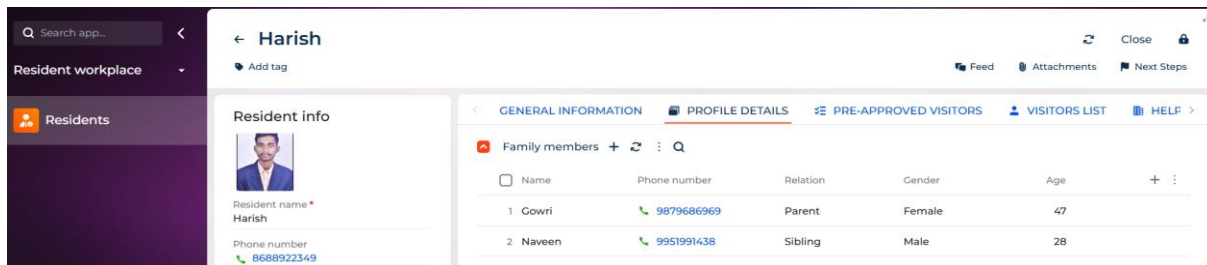
- Family Members
- Vehicles
- Domestic Staff

- Visitors
- Complaints
- Invoices
- Announcements

The resident can maintain and update these records as required.

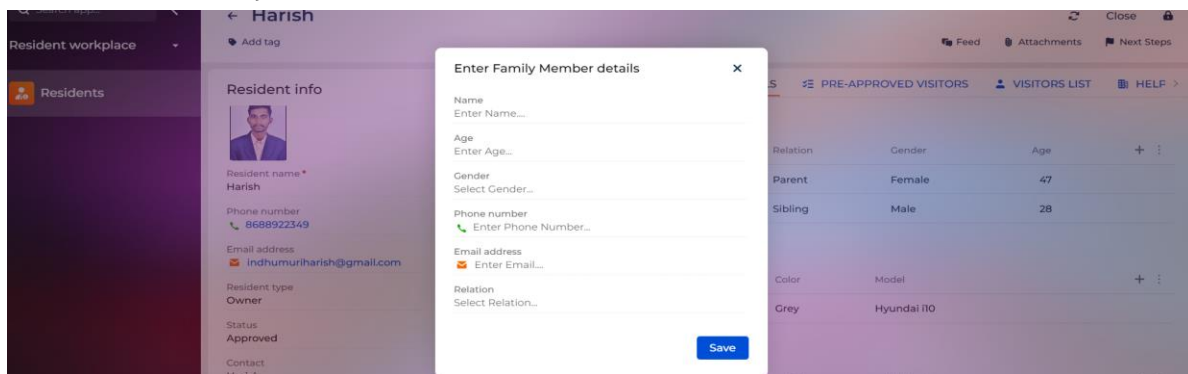
6.6 Managing Family Members

The Family Members section allows residents to maintain information about family members residing within the unit.



To add a family member:

1. Navigate to the Family Members Detail.
2. Click Add.
3. Enter the family member details.



4. Click Save.

Maintaining family member information helps the society maintain accurate occupancy records.

6.7 Managing Vehicles

The Vehicles section allows residents to maintain vehicle information associated with their unit.

Resident info



Resident name
Harish

Phone number
8688922349

Email address
indhumiharish@gmail.com

Resident type
Owner

Status
Approved

Contact
Harish

☒ Inactive

GENERAL INFORMATION

PROFILE DETAILS

PRE-APPROVED VISITORS

VISITORS LIST

HELP DESK

INVOICES

ANNOUNCEMENTS

Family members + 🔍

☐	Name	Phone number	Relation	Gender	Age	+ ⋮
1	Venkateshwarlu	8989767689	Parent	Male	55	
2	Gowri	7878909009	Parent	Female	45	
3	Naveen	9951991438	Sibling	Male	28	

Vehicles + 🔍

☐	Vehicle type	Vehicle number	Color	Model	Parking slot	+ ⋮
1	Scooter	TS15ES3773	Cream	Jupiter Classic	47	
2	Bike	TS15E4150	Rebel Blue	Royal Enfield H.L.	47	
3	Car	AP13R9747	Grey	Hyundai i10	47	

To add a vehicle:

1. Click Add from the Vehicles section.
2. Enter vehicle details.
3. Save the record.

The screenshot shows a web application interface for managing resident information. On the left, a sidebar displays 'Resident info' for Harish, including his name, phone number (8688922349), email address (indhumuriharish@gmail.com), and status (Approved). The main area shows a 'Vehicles' section with a '+ Add' button. A modal form titled 'Enter vehicle details' is open, allowing users to input the following information:

- Vehicle type: Select Vehicle Type...
- Vehicle number: Enter Vehicle Number...
- Model: Enter vehicle Model...
- Color: Enter Vehicle Colour...
- Parking slot: 47

A 'Save' button is located at the bottom right of the modal.

Vehicle information can be used for security verification and parking management purposes.

6.8 Managing Domestic Staff

The Domestic Staff section allows residents to maintain information about domestic workers associated with their residence.

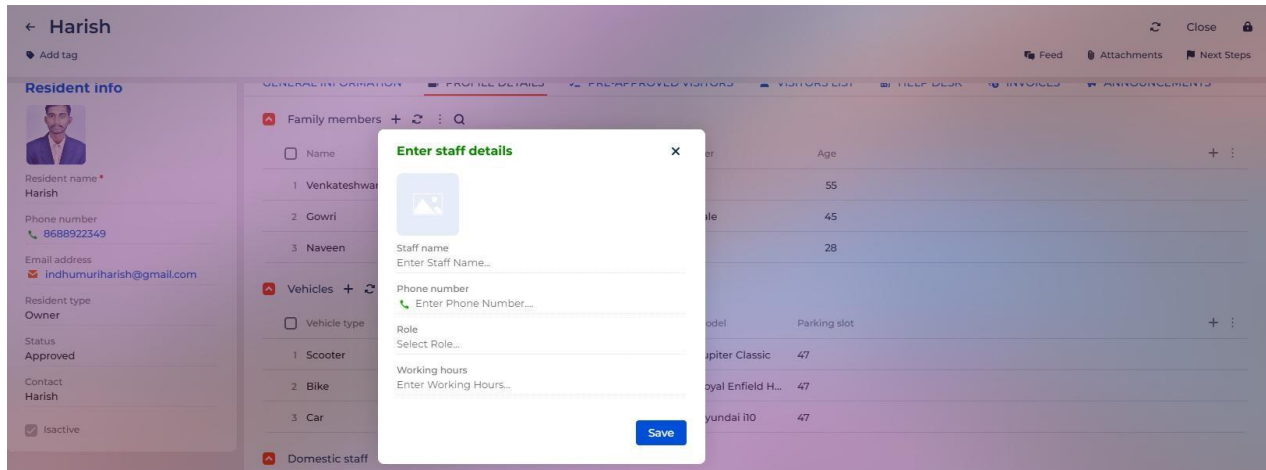
The screenshot shows the 'Domestic staff' section of the application. It features a table with columns for Staff name, Phone number, Role, and Working hours. The table lists four staff members:

Staff name	Phone number	Role	Working hours
1. Vaishnavi	6565756578	Cook	12
2. Bal Reddy	8796857589	Watchman	8
3. Arshiya	6768696867	Maid	8
4. Avinash	9898787899	Driver	12

The 'Domestic staff' section is highlighted with a red border. The sidebar on the left shows the resident's profile for Harish, and the top navigation bar includes options like 'Add tag', 'Feed', 'Attachments', and 'Next Steps'.

To add a domestic staff member:

1. Click Add.
2. Enter staff information.
3. Save the record.

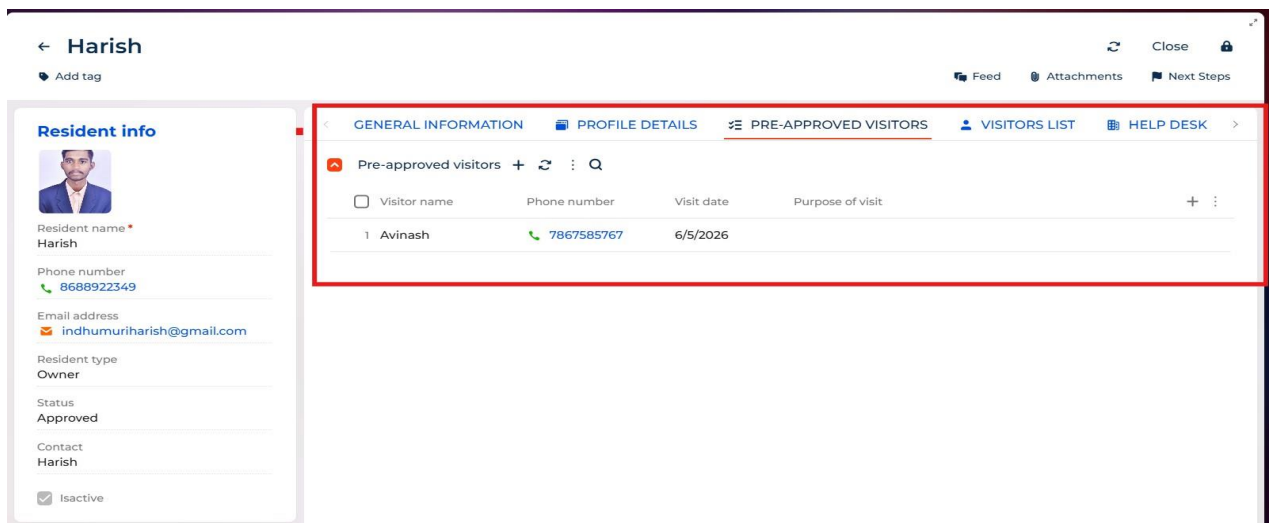


Maintaining domestic staff information improves security and helps the society maintain accurate records of authorized personnel entering residential units.

6.9 Pre-Approved Visitors

The Pre-Approved Visitors section allows residents to register visitors before they arrive at the society premises. This helps reduce waiting time at the security gate and enables faster visitor entry.

Pre-Approved Visitors List



The Pre-Approved Visitors List displays all visitors that have been registered in advance by the resident.

Residents can:

- View previously registered visitors.
- Search and review visitor information.
- Track visitor details and visit dates.
- Create new pre-approved visitor requests.

Creating a Pre-Approved Visitor

To register a visitor in advance:

1. Navigate to the Pre-Approved Visitors section.
2. Click Add.
3. Enter visitor details.
4. Provide the expected visit date and time.
5. Save the record.

The screenshot displays a mobile application interface for managing visitor information. On the left, a sidebar shows the profile of a resident named Harish, including their photo, name, phone number (8688922349), email address (indhumuriharish@gmail.com), resident type (Owner), status (Approved), and contact name (Harish). The main screen is titled 'PRE-APPROVED VISITORS' and features a modal form titled 'Enter pre-approved visitor details'. This form includes fields for 'Visitor name' (with a placeholder 'Enter Visitor Name...'), 'Phone number' (with a placeholder 'Enter Phone Number...'), 'Visit date' (with a placeholder 'Enter Visiting Date...'), and 'Purpose of visit' (with a placeholder 'Enter Purpose...'). A blue 'Save' button is located at the bottom right of the modal. The background shows a table with columns for 'Date' and 'Purpose of visit'.

Once saved, the visitor information becomes available to the security team.

When the visitor arrives at the society entrance, security personnel can verify the details and complete the visitor check-in process without requiring additional approval from the resident.

This process helps improve visitor management efficiency and enhances the resident experience.

6.10 Visitor Tracking

The Visitors section enables residents to monitor all visitor activities associated with their unit.

The application maintains records for various visitor categories, including:

- Walk-In Visitors
- Service Visitors
- Delivery Visitors

Visitors List

The Visitors List tab displays all visitors associated with the resident's unit.

Residents can:

- View visitor details.
- Track approval status.
- Review visitor type.
- Monitor visitor entry and exit information.
- View visitor history.

Resident info

Resident name: Harish

Phone number: 8688922349

Email address: indhumuriharish@gmail.com

Resident type: Owner

Status: Approved

Contact: Harish

Is active: ☒

Visitors List

Walk-in visitors

Visitor id	Visitor name	Phone number	Created On	Check-in time	Check-out time
VSTR ID - 00014	Harish	9865478329	6/9/2026	8:43 PM	8:43 PM

Delivery visitors

No data

Service visitors

No data

Visitor Details

Search app...

Resident workplace

Residents

← VSTR ID - 00024

Add tag

Feed Attachments

Pending

Approved

Visitor info

Visitor id *
VSTR ID - 00024

Visitor name
bal

Phone number
9786959436

Visit date
7/15/2026

Approval status
Approved

Visit status
Checked-Out

GENERAL INFORMATION

Visit type
Service

Visiting resident *
Harish

Check-in time
1:13 PM

Service type
Internet

Purpose of visit
Describe Purpose of Visit...

Check-out time
1:13 PM

Each visitor record contains detailed information regarding the visit, including visitor details, resident information, approval status, check-in time, and check-out time.

This provides complete visibility into visitor activities and helps residents monitor who has entered and exited their unit.

6.11 Help Desk Management

The Help Desk section allows residents to raise complaints and service requests related to society facilities and maintenance activities.

Complaints List

← Harish

Add tag

Feed Attachments Next Steps

Resident info

Resident name *
Harish

Phone number
8688922349

Email address
indhumuriharish@gmail.com

Resident type
Owner

Status
Approved

GENERAL INFORMATION

PROFILE DETAILS

PRE-APPROVED VISITORS

VISITORS LIST

HELP DESK

Complaints list

Raise a ticket

Refresh

Search

Complaint id	Complaint title	Complaint type	Status	Resident confirmation status
1 ID - 00004	Earthing	Electrical	Resolved	Pending-Approval
2 ID - 00005	Theft	Security	Closed	Approved
3 ID - 00009	Electrical	Electrical	In-Progress	
4 ID - 00007	xvz	Other	Closed	Approved

The Complaints List page displays all complaints raised by the resident.

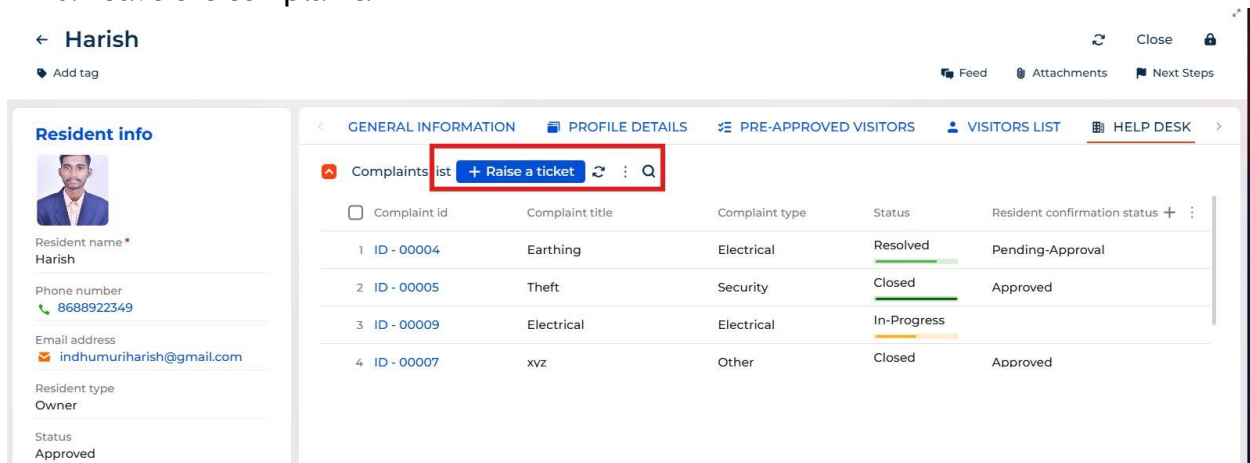
Residents can:

- View complaint records.
- Track complaint status.
- Review complaint history.
- Monitor resolution progress.
- Create new complaints.

Raising a Complaint

To raise a complaint:

1. Navigate to the Complaints section.
2. Click Raise a ticket Button.(which will navigate to complaints page)
3. Enter complaint details.
4. Select the appropriate complaint category.
5. Provide a description of the issue.
6. Save the complaint.



The screenshot shows a user interface for a resident named Harish. On the left, there is a 'Resident info' sidebar with a profile picture, name, phone number (8688922349), email address (indhumuriharish@gmail.com), resident type (Owner), and status (Approved). The main area displays a 'Complaints list' table. A red box highlights the '+ Raise a ticket' button in the top right corner of the table. The table has columns for Complaint id, Complaint title, Complaint type, Status, and Resident confirmation status. It lists four complaints: 1. ID - 00004 (Earthing, Electrical, Resolved, Pending-Approval), 2. ID - 00005 (Theft, Security, Closed, Approved), 3. ID - 00009 (Electrical, Electrical, In-Progress), and 4. ID - 00007 (xvz, Other, Closed, Approved).

Complaint id	Complaint title	Complaint type	Status	Resident confirmation status
1 ID - 00004	Earthing	Electrical	Resolved	Pending-Approval
2 ID - 00005	Theft	Security	Closed	Approved
3 ID - 00009	Electrical	Electrical	In-Progress	
4 ID - 00007	xvz	Other	Closed	Approved

After submission, the complaint becomes available to the administrator for review and resolution.

Complaint Resolution Process

When the administrator resolves a complaint, the complaint status is updated accordingly.

The application then sends a confirmation request to the resident. Where the resident will see the resident confirmation status for the complaint as pending-Approval

Resident info



Resident name *
Harish

Phone number
8688922349

Email address
indhumurharish@gmail.com

Resident type
Owner

GENERAL INFORMATION

PROFILE DETAILS

PRE-APPROVED VISITORS

VISITORS LIST

HELP DESK

Complaints list

+ Raise a ticket

:

Q

☐	Complaint id	Complaint title	Complaint type	Status	Resident confirmation status +
	1 ID - 00004	Earthing	Electrical	Resolved	Pending-Approval
	2 ID - 00005	Theft	Security	Closed	Approved
	3 ID - 00009	Electrical	Electrical	In-Progress	
	4 ID - 00007	xvz	Other	Closed	Approved

The resident reviews the resolution and can confirm whether the issue has been resolved satisfactorily.

Search app...

Resident workplace

Residents

ID - 00005

Add tag

Feed Attachments Next Steps

New In-Progress Resolved Closed

Complaint id * ID - 00005

Complaint title Plumbing

Complaint type Plumbing

Created on 7/14/2026 12:02 PM

GENERAL INFORMATION

Description Tap Leakage

Resolved date 7/14/2026 12:04 PM

Closed date

Priority High

Status Resolved

Resident confirmation status Pending-Approval

Approvals

Approval purpose

Approval required

✓

✗

Positive ✓ 0

Negative ✗ 0

Pending ⌄ 1

Once the resident approves the resolution, the complaint is officially closed.

This process ensures transparency and helps maintain service quality throughout the complaint lifecycle.

6.9 Invoice and Payment Management

The Invoice and Payment Management module enables residents to view invoices generated by the society administration, track outstanding dues, submit payments, and monitor payment status.

This module provides complete visibility into billing information and payment history.

Viewing Invoices

All invoices generated by the administrator are available within the Invoices Tab.

Invoices List

Resident info		GENERAL INFORMATION PROFILE DETAILS PRE-APPROVED VISITORS VISITORS LIST HELP DESK INVOICES ANNOUNCEMENTS						
 Resident name* Harish Phone number 8688922349 Email address indhumuriharish@gmail.com		Invoices 🔍						
		Invoice number	Invoice date	Due date	Status	Total amo...	Total tax a...	Total amo...
		1 INV-00029	6/9/2026	6/14/2026	Paid	6,700.00	722.00	7,422.00
		2 INV-00020	6/5/2026	6/10/2026	Pending	722.00	722.00	7,422.00
		3 INV-00014	6/5/2026	6/10/2026	Paid	722.00	722.00	7,422.00

The Invoice List page displays all invoices associated with the resident's unit.

Residents can:

- View invoice details.
- Review invoice amounts.
- Monitor invoice status.
- Track payment progress.
- View due dates.

Common invoice statuses include:

- Pending
- Partially Paid
- Paid

Invoice Details

To review detailed billing information, the resident can open the invoice record.

Resident workplace		← INV-00005					Pay now	Invoice download	Close
Residents		Add tag							
		Pending Partially Paid Paid							
Basic info		GENERAL INFORMATION PAYMENT DETAILS							
Invoice number* INV-00005		Invoice charges 🔍							
Status Partially Paid		Invoice	Charge type	Amount	Taxable amount	Amount (incl.tax)			
Invoice type Monthly		1 INV-00005	Gas Bill	1,000.00	180.00	1,180.00			
Invoice date 7/13/2026		2 INV-00005	Maintenance	1,500.00	150.00	1,650.00			
Due date 7/18/2026		3 INV-00005	Water Bill	400.00	24.00	424.00			
Unit type Residential		4 INV-00005	Parking Charges	2,000.00	0.00	2,000.00			
Resident Harish		Grand total							
		Total amount 7,900.00		Total tax amount 894.00					
		Total amount (incl.tax) 8,794.00							

The Invoice Form page provides complete information about the invoice, including:

- Invoice Number
- Invoice Date
- Due Date
- Invoice Status
- Total Amount
- Total Tax Amount
- Total Amount Including Tax

The invoice also contains individual invoice charges that contribute to the final invoice amount.

Residents can review each charge along with the associated tax calculations.

And also residents can download their invoice through Invoice download button.

Making a Payment

To submit a payment, the resident opens the invoice and clicks the Pay Now button.

The screenshot displays the invoice details for INV-00005. The 'Pay now' button is highlighted with a red box. The page shows the invoice status as 'Partially Paid' and a progress bar indicating the payment status. The 'Basic info' section includes the invoice number, status, type, date, and due date. The 'GENERAL INFORMATION' and 'PAYMENT DETAILS' tabs are visible, with the 'PAYMENT DETAILS' tab showing a table of invoice charges.

Invoice	Charge type	Amount	Taxable amount	Amount (incl.tax)
1 INV-00005	Gas Bill	1,000.00	180.00	1,180.00
2 INV-00005	Maintenance	1,500.00	150.00	1,650.00
3 INV-00005	Water Bill	400.00	24.00	424.00
4 INV-00005	Parking Charges	2,000.00	0.00	2,000.00

Grand total

Total amount	7,900.00	Total tax amount	894.00
Total amount (incl.tax)	8,794.00		

Selecting the Pay Now option automatically opens the Payment page and links the payment to the selected invoice.

Payment Submission

The Payment page is used to capture payment information submitted by the resident.

PAYID-00012

Save Cancel

Feed Attachments

Pending - Approval Approved

Basic info

Payment id *
PAYID-00012

Resident
Harish

Invoice
INV-00006

Invoice status
Partially Paid

Payment amount
1,234.00

Due amount
445.00

GENERAL INFORMATION

Payment information

Payment mode
Select Mode of Payment...

Payment date
7/15/2026 1:45 PM

Amount paid
Enter the Paid Amount...

Reference id (tnx no.)
Enter Transaction Reference ID...

Depending on the selected payment method, the resident provides the required payment information, including:

- Amount Paid
- Payment Method
- Transaction Reference Number

After entering the required details, the resident clicks Save to submit the payment.

Payment Approval Process

Once a payment is submitted, the payment is routed to the administrator for verification and approval.

The administrator reviews the payment information and validates the transaction details.

After successful verification, the administrator approves the payment request.

The resident receives a payment approval notification confirming that the payment has been accepted.

Payments

Folders Tag Search

Σ Summaries

Payment id	Payment date	Payment status	Payment mode	Payment amount	Amount paid	Invoice
1 PAYID-00007	7/14/2026 5:56 PM	Approved	UPI	8,894.00	194.00	INV-00004
2 PAYID-00010	7/15/2026 12:05 PM	Approved	Bank Transfer	1,234.00	789.00	INV-00006
3 PAYID-00004	7/13/2026 4:39 PM	Approved	Bank Transfer	8,794.00	8,000.00	INV-00005
4 PAYID-00012	7/15/2026 1:45 PM	Pending - Approval	Debit/Credit Card	1,234.00	440.00	INV-00006
5 PAYID-00006	7/14/2026 12:07 PM	Approved	Cash	8,794.00	90.00	INV-00004
6 PAYID-00003	7/13/2026 4:15 PM	Approved	Bank Transfer	8,794.00	8,700.00	INV-00004

A screenshot of an email interface. The header shows the subject "Partial Payment Received for Your invoice" and a status "Inbox x". The sender is "harish.indhumuri@gmail.com" with a profile picture of a red circle containing a white 'h'. The email is dated "Fri, Jun 5, 5:16 PM (6 days ago)". The body of the email contains the following text: "Hello Harish, We have received your payment for the invoice. However, the payment is partially completed. Invoice Number: INV-00014 Please complete the remaining payment at your earliest convenience. If you have any questions, feel free to contact us. Best Regards, A4SocietyConnect".

The application supports partial invoice payments.

In this scenario:

- ← INV-00020
Close

+ Add tag
Refresh Feed Attachments

Basic info

Invoice number *
INV-00020

Status
Partially Paid

Invoice type
Monthly

Invoice date
6/5/2026

Due date
6/10/2026

Pending
Partially Paid
Paid

GENERAL INFORMATION
PAYMENT DETAILS

Payments 🔍 ⌵

☐	Payment id	Payment date	Payment amount	Payment mode	Payment status	Status	⋮
☒	PAYID-00028	6/11/2026 4:24 PM	7,422.00	UPI	Approved	Partially Paid	

The resident can return later and submit another payment for the remaining amount.

Due Amount Tracking

To help residents identify the remaining balance, the application automatically calculates and displays the outstanding due amount.

When a resident initiates a subsequent payment for the same invoice, the Due Amount field displays the remaining unpaid balance.

For example:

- Invoice Amount: ₹15,000
- Amount Already Paid: ₹14,000
- Remaining Due Amount: ₹1,000

The screenshot shows a mobile application interface for a payment system. The top bar includes a search bar, a back arrow, and the payment ID 'PAYID-00013'. Below the bar, there's a 'Resident workplace' dropdown and an 'Add tag' button. The main content area is divided into two sections: 'Basic info' and 'GENERAL INFORMATION'. The 'Basic info' section contains fields for 'Payment id' (PAYID-00013), 'Resident' (Harish), 'Invoice' (INV-00006), 'Invoice status' (Partially Paid), 'Payment amount' (1,234.00), and 'Due amount' (445.00). The 'Due amount' field is highlighted with a red box. The 'GENERAL INFORMATION' section contains a 'Payment information' section with fields for 'Payment mode' (Select Mode of Payment...), 'Payment date' (7/15/2026 1:48 PM), 'Amount paid' (Enter the Paid Amount...), and 'Reference id (txn no.)' (Enter Transaction Reference ID...). The top right corner has buttons for 'Save', 'Cancel', and 'Feed', and an 'Attachments' icon.

This ensures that residents always know the exact amount pending against an invoice

Full Payment Scenario

Once the total approved payments become equal to the invoice amount, the invoice is automatically considered fully paid.

In this scenario:

- Payment Status becomes Approved.
- Invoice Status becomes Paid.
- No outstanding balance remains.
- And also it maintains full payment history for that Invoice

The screenshot displays the 'INV-00020' invoice page. On the left, the 'Basic info' section includes fields for Invoice number (INV-00020), Status (Paid), Invoice type (Monthly), Invoice date (6/5/2026), Due date (6/10/2026), Unit type (Residential), and Resident (Harish). The main area features a progress bar with 'Pending', 'Partially Paid', and 'Paid' stages. Below this, the 'PAYMENT DETAILS' tab is active, showing a table of payments. The table has columns for Payment id, Payment date, Payment amount, Payment mode, Payment status, and Status. Two payments are listed: PAYID-00029 (Bank Transfer, Approved, Paid) and PAYID-00028 (UPI, Approved, Paid).

Payment id	Payment date	Payment amount	Payment mode	Payment status	Status
1 PAYID-00029	6/11/2026 4:35 PM	7,422.00	Bank Transfer	Approved	Paid
2 PAYID-00028	6/11/2026 4:24 PM	7,422.00	UPI	Approved	Paid

The resident can continue to access invoice and payment history for future reference.

The resident can review all previously submitted payments through the Payments Details tab in a Invoice Page.

6.10 Announcements

The Announcements section enables residents to stay informed about important updates, notices, maintenance activities, events, and communications published by the society administration.

All announcements created by the administrator are automatically made available to residents through this section.

Viewing Announcements

Residents can access the Announcements section from their resident record.

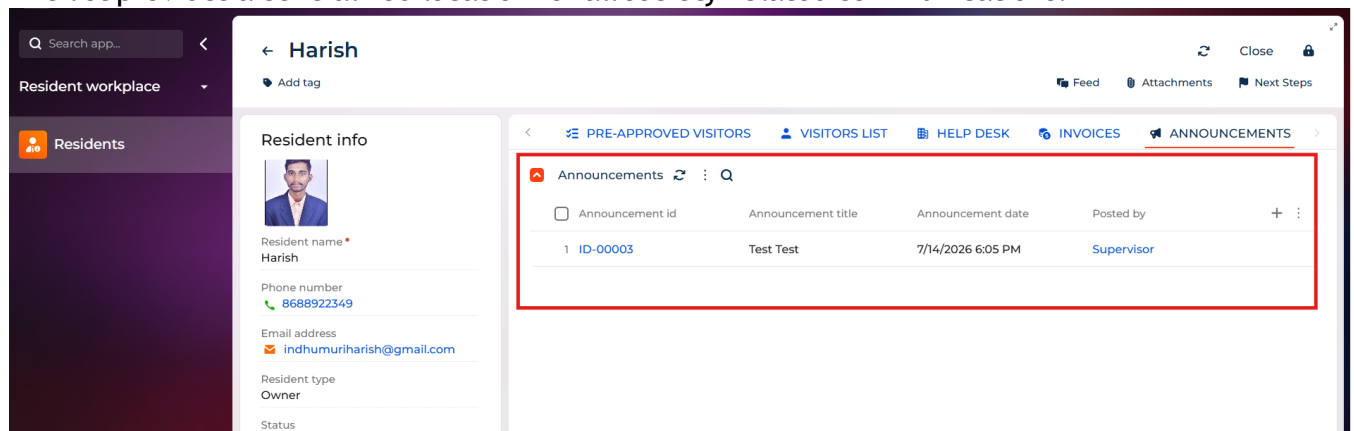
Announcements List

The Announcements List displays all announcements published by the society administration.

Residents can:

- View active announcements.
- Review society notices and updates.
- Track upcoming events and activities.
- Stay informed about maintenance schedules.
- Access important communications from the society management team.

The list provides a centralized location for all society-related communications.



Announcement Details

Residents can open an announcement record to view complete information.



The Announcement Form page contains detailed information regarding the announcement, including:

- Announcement Title
- Description
- Announcement Date
- PostedBy

The description section provides the complete communication published by the administrator.

Residents are encouraged to review announcements regularly to remain informed about society activities, operational updates, policy changes, maintenance schedules, and other important notices.

Benefits of Announcements

The Announcements feature provides a reliable communication channel between the society administration and residents.

Key benefits include:

- Improved communication across the society.
- Timely sharing of important notices.
- Increased awareness of maintenance activities.
- Better resident engagement.
- Centralized access to society-wide updates.

By regularly reviewing announcements, residents can stay informed about activities and developments occurring within their society.

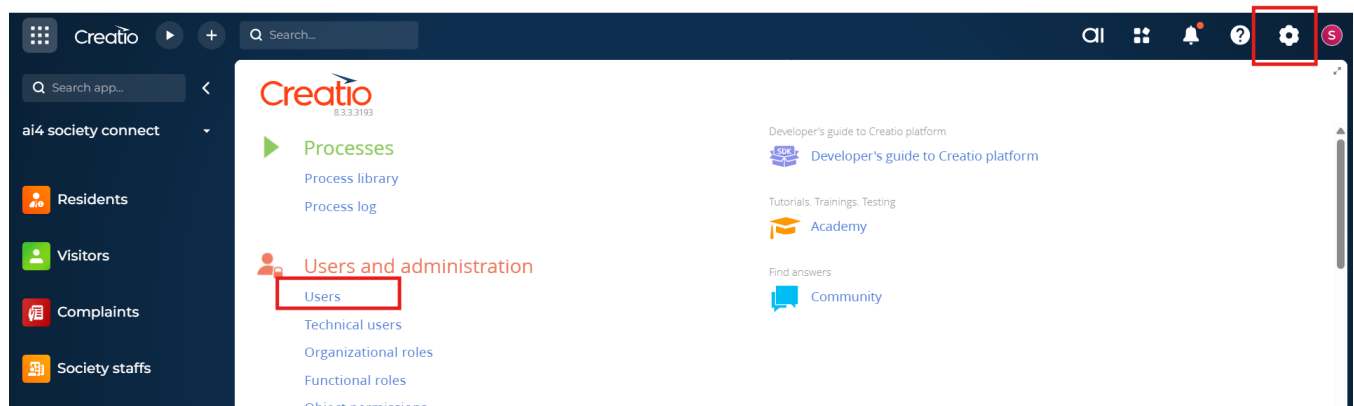
7 Security (Visitor Management) User Guide

Before using the Visitor Management module, a user account must be created and assigned to the Visitor Management role. Users assigned to this role are responsible for managing visitor entries, approvals, check-in/check-out activities, and society staff attendance.

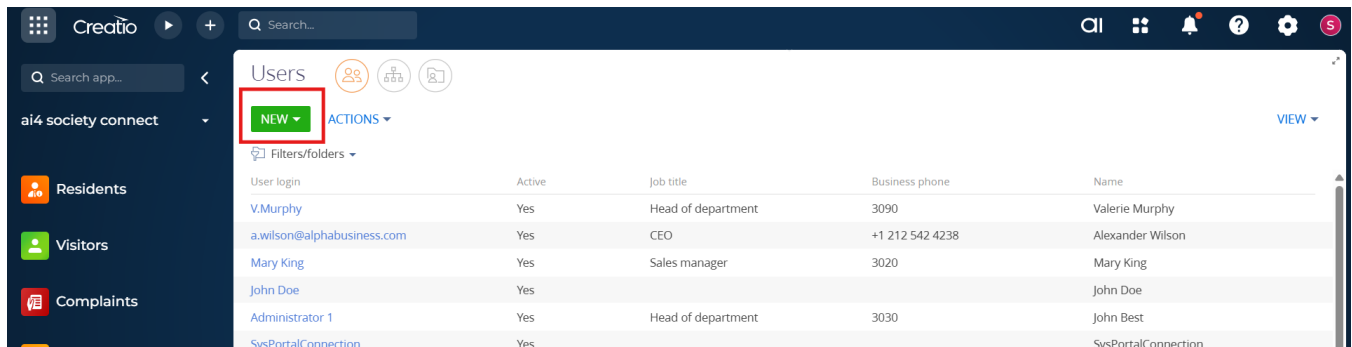
Creating a Visitor Management User

Follow the steps below to create a Visitor Management user:

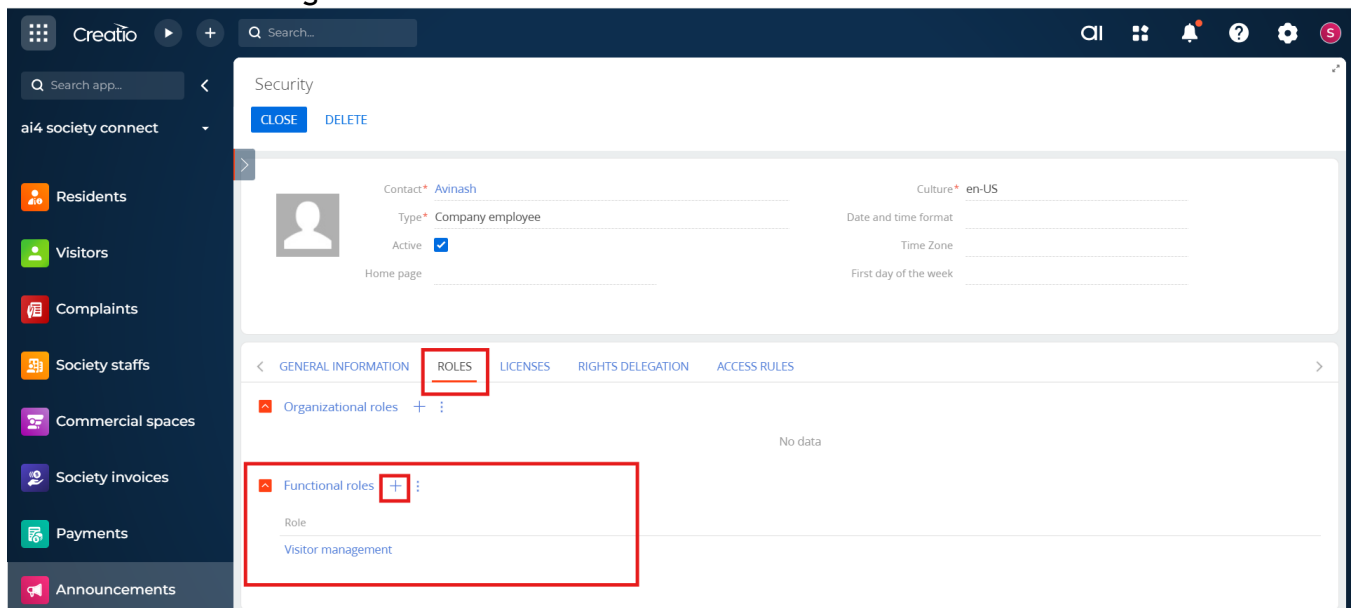
1. Navigate to System Designer.
2. Click Users.



3. Click New to create a new user.



4. Enter the required user information, including:
 - User Name
 - Contact
 - Email Address
 - Password (or follow your organization's password policy)
5. Save the user record.
6. Open the newly created user.
7. Navigate to the Roles tab, Under Functional roles.
8. Add the user to the Visitor Management role.
9. Save the changes.



After assigning the Visitor Management role, the user can log in using the assigned credentials and will have access to the Visitors and Society Staffs sections.

7.1 Security User Overview

The Security user plays a vital role in managing visitor movement and staff attendance within the society.

After logging in, the Security user has access to the following sections:

- Visitors

- Society staffs

The Security user is responsible for:

- Managing visitor entry and exit activities.
- Processing visitor approvals.
- Tracking visitor movements.
- Recording society staff attendance.
- Maintaining accurate operational records.

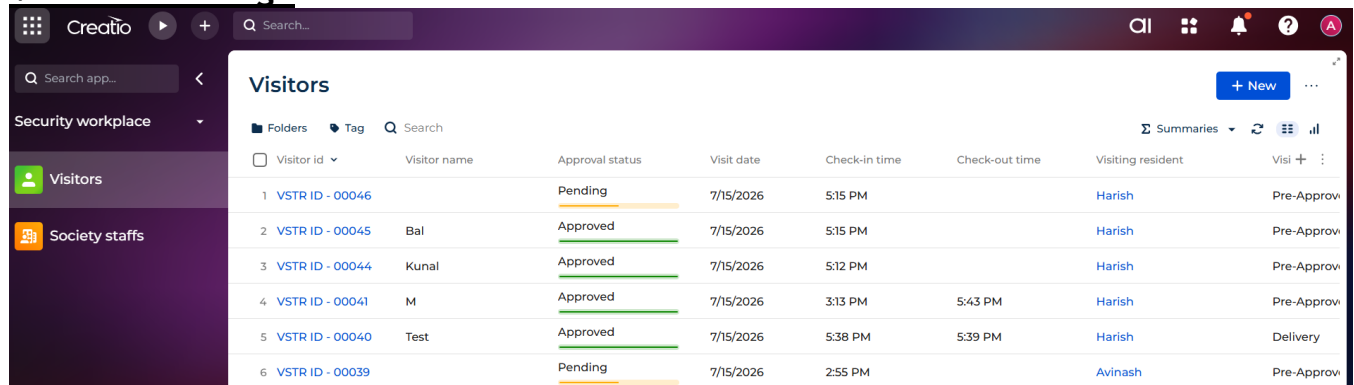
7.2 Visitors Management

The Visitors section is used to manage all visitor-related activities occurring within the society.

Visitors may enter the society through two different processes:

- Pre-Approved Visitors
- Walk-In, Service, or Delivery Visitors

Visitors List Page



Visitor ID	Visitor name	Approval status	Visit date	Check-in time	Check-out time	Visiting resident	Visitor type
1 VSTR ID - 00046		Pending	7/15/2026	5:15 PM		Harish	Pre-Approved
2 VSTR ID - 00045	Bal	Approved	7/15/2026	5:15 PM		Harish	Pre-Approved
3 VSTR ID - 00044	Kunal	Approved	7/15/2026	5:12 PM		Harish	Pre-Approved
4 VSTR ID - 00041	M	Approved	7/15/2026	3:13 PM	5:43 PM	Harish	Pre-Approved
5 VSTR ID - 00040	Test	Approved	7/15/2026	5:38 PM	5:39 PM	Harish	Delivery
6 VSTR ID - 00039		Pending	7/15/2026	2:55 PM		Avinash	Pre-Approved

The Visitors List page displays all visitor records available within the application.

Security personnel can:

- View visitor records.
- Search visitor information.
- Monitor approval status.
- Track visitor movements.
- Review check-in and check-out details.

7.3 Managing Pre-Approved Visitors

Residents can pre-register visitors before they arrive at the society.

When a pre-approved visitor arrives, the Security user can quickly verify the visitor information and process the entry.

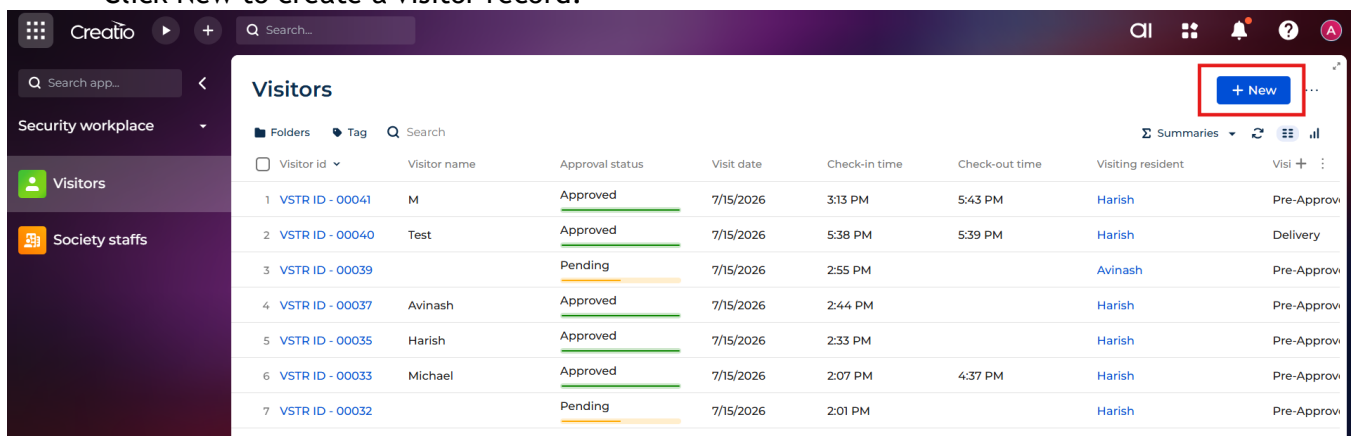
Creating a Pre-Approved Visitor Entry

The ai4 Society Connect application provides a streamlined process for managing pre-approved visitors. Instead of manually entering visitor details, the Security user can select a pre-approved visitor record created by the resident and complete the check-in process with a single action.

Pre-Approved Visitor Check-In

When a resident creates a pre-approved visitor request, the visitor details are stored in the application. During the visitor's arrival, the Security user performs the following steps:

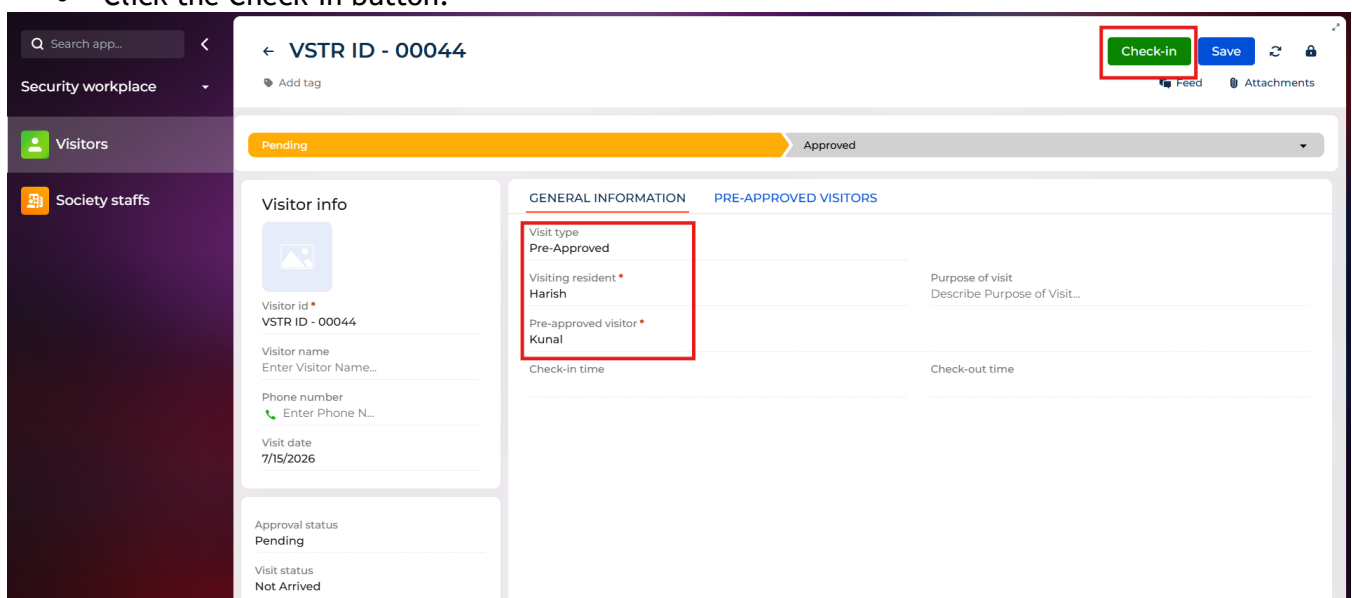
- Navigate to the Visitors section.
- Click New to create a visitor record.



The screenshot shows the 'Visitors' section of the ai4 Society Connect application. The interface includes a sidebar with 'Security workplace', 'Visitors', and 'Society staffs'. The main area displays a table of visitor records. A '+ New' button is highlighted with a red box in the top right corner.

Visitor id	Visitor name	Approval status	Visit date	Check-in time	Check-out time	Visiting resident	Visit
1 VSTR ID - 00041	M	Approved	7/15/2026	3:13 PM	5:43 PM	Harish	Pre-Approv
2 VSTR ID - 00040	Test	Approved	7/15/2026	5:38 PM	5:39 PM	Harish	Delivery
3 VSTR ID - 00039		Pending	7/15/2026	2:55 PM		Avinash	Pre-Approv
4 VSTR ID - 00037	Avinash	Approved	7/15/2026	2:44 PM		Harish	Pre-Approv
5 VSTR ID - 00035	Harish	Approved	7/15/2026	2:33 PM		Harish	Pre-Approv
6 VSTR ID - 00033	Michael	Approved	7/15/2026	2:07 PM	4:37 PM	Harish	Pre-Approv
7 VSTR ID - 00032		Pending	7/15/2026	2:01 PM		Harish	Pre-Approv

- Select Visit Type as Pre-Approved.
- Select the Visiting Resident.
- Select the required record from the Pre-Approved Visitor lookup field.
- Click the Check-In button.



The screenshot shows the 'Pre-Approved Visitor Check-In' form in the ai4 Society Connect application. The form is titled 'VSTR ID - 00044' and has a 'Check-In' button highlighted with a red box. The form includes fields for Visitor info, General Information, and Pre-Approved Visitors.

Visitor info

Visitor id: VSTR ID - 00044

Visitor name: Enter Visitor Name...

Phone number: Enter Phone N...

Visit date: 7/15/2026

Approval status: Pending

Visit status: Not Arrived

GENERAL INFORMATION

Visit type: Pre-Approved

Visiting resident: Harish

Pre-approved visitor: Kunal

Check-in time:

Check-out time:

PRE-APPROVED VISITORS

Purpose of visit: Describe Purpose of Visit...

Check-In Process

When the Check-In button is clicked, the application validates that the selected Pre-Approved Visitor belongs to the selected resident and matches the visit date.

If the validation is successful, the application automatically:

- Copies the Visitor Name from the selected Pre-Approved Visitor record.
- Copies the Phone Number from the selected Pre-Approved Visitor record.
- Updates the Approval Status to Approved.
- Updates the Visit Status to Checked-In.
- Records the current Check-In Time.
- Updates the corresponding Pre-Approved Visitor record to Checked-In, preventing it from being reused.

This automation eliminates manual data entry, ensures that only valid pre-approved visitors are checked in, and maintains accurate visitor records.

The screenshot displays the 'VSTR ID - 00041' record in the Creatio application. The interface includes a sidebar with 'Security workplace', 'Visitors', and 'Society staffs'. The main content area shows a 'Pending' status bar and a 'GENERAL INFORMATION' section. The 'Visitor info' section contains fields for Visitor id (VSTR ID - 00041), Visitor name (M), Phone number (123456), Visit date (7/15/2026), Approval status (Approved), and Visit status (Checked-In). The 'GENERAL INFORMATION' section includes Visit type (Pre-Approved), Visiting resident (Harish), Purpose of visit (Test), Pre-approved visitor (M), Check-in time (3:13 PM), and Check-out time (5:43 PM). A 'Check-out' button is visible in the top right corner.

Validation

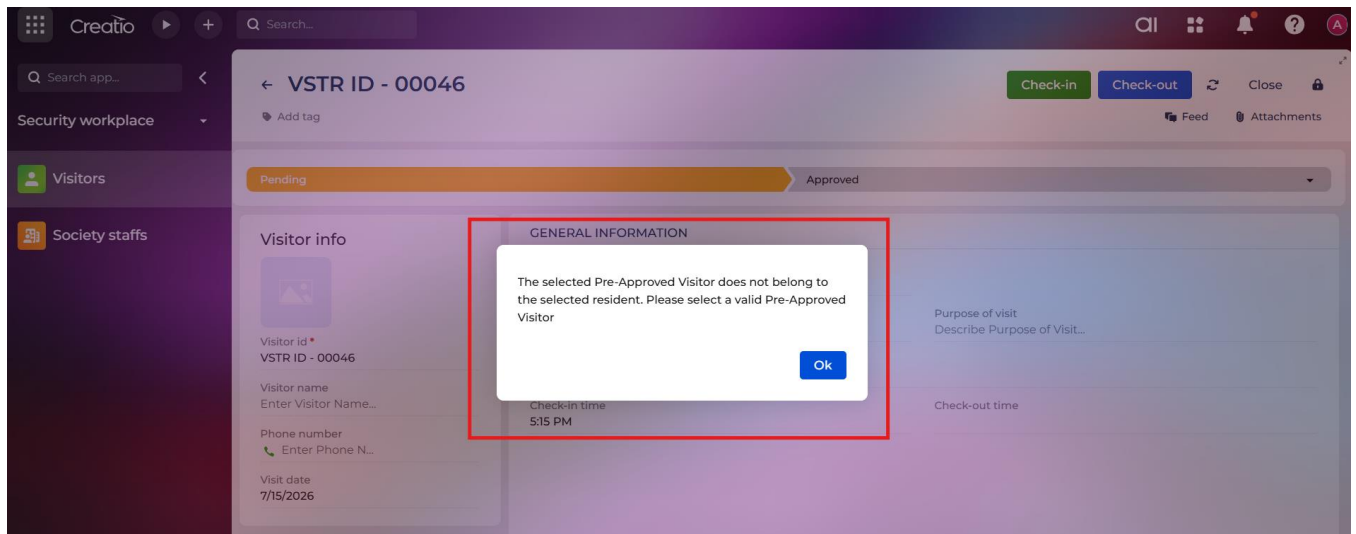
To maintain data integrity, the application validates the selected Pre-Approved Visitor before completing the check-in process.

If:

- the selected Pre-Approved Visitor does not belong to the selected resident, or
- the visit date does not match,

the application displays an error message and does not complete the check-in process until a valid Pre-Approved Visitor record is selected.

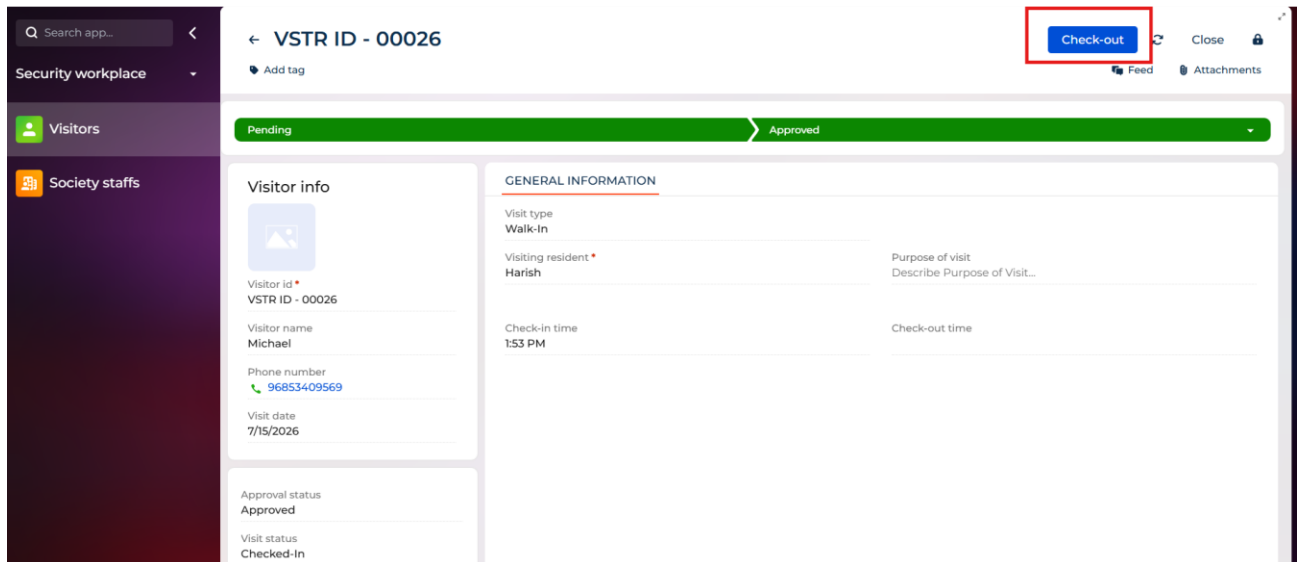
This validation ensures that only authorized pre-approved visitors can be checked into the society.



Check- out Process

The application tracks both visitor entry and exit activities.

When a visitor leaves the society premises, the Security user opens the visitor record and clicks the Check-Out button.



The application automatically:

- Updates the Check-Out Time.
- Updates Visit Status to Checked-Out.
- Completes the visitor visit cycle.

Search app... < VSTR ID - 00005

Security workplace Add tag Feed Attachments

Visitors Society staffs

Pending Approved

Visitor info

Visitor id *
VSTR ID - 00005

Visitor name
Harish

Phone number
8688922349

Visit date
7/14/2026

Approval status
Approved

Visit status
Checked-Out

GENERAL INFORMATION

Visit type
Walk-In

Visiting resident *
Harish

Purpose of visit
Describe Purpose of Visit...

Check-in time
9:52 AM

Check-out time
12:27 PM

This provides a complete audit trail of visitor movements within the society.

7.4 Managing Walk-In, Service, and Delivery Visitors

Visitors who arrive without prior approval require authorization from the resident before entering the society.

Creating Visitor Approval Request

To create a visitor request:

1. Create a new visitor record.
2. Enter visitor details.
3. Select the visiting resident.
4. Select Visitor Type as Walk-In, Service, or Delivery.
5. Save the visitor record.

Q Search app...

Security workplace

Visitors

Society staffs

← VSTR ID - 00025

Request approval

Close

Feed

Attachments

Add tag

Pending

Approved

Visitor info



Visitor id
VSTR ID - 00025

Visitor name
Harish

Phone number
8688922349

Visit date
7/15/2026

Approval status
Pending

Visit status
Not Arrived

GENERAL INFORMATION

Visit type
Walk-in

Visiting resident
Harish

Check-in time

Purpose of visit
Describe Purpose of Visit...

Check-out time

After saving the visitor information, the Security user clicks the Request Approval button.

The screenshot shows a web application interface for managing visitor information. The top navigation bar includes a search bar, a back arrow, and the title 'VSTR ID - 00025'. A red box highlights a green 'Request approval' button in the top right corner. Below the title bar, there's a status bar with 'Pending' and 'Approved' tabs. The main content area is divided into two columns. The left column, titled 'Visitor info', contains fields for Visitor id (VSTR ID - 00025), Visitor name (Harish), Phone number (8688922349), and Visit date (7/15/2026). The right column, titled 'GENERAL INFORMATION', contains fields for Visit type (Walk-In), Visiting resident (Harish), Purpose of visit (Describe Purpose of Visit...), Check-in time, and Check-out time. At the bottom, there's a section for Approval status (Pending) and Visit status (Not Arrived).

The application sends an approval request to the selected resident.

Resident Approval Process

The screenshot shows a web application interface for managing visitor information. The top navigation bar includes a search bar, a back arrow, and the title 'VSTR ID - 00026'. A blue box highlights a blue 'Check-out' button in the top right corner. Below the title bar, there's a status bar with 'Pending' and 'Approved' tabs. The main content area is divided into two columns. The left column, titled 'Visitor info', contains fields for Visitor id (VSTR ID - 00026), Visitor name (Michael), Phone number (96853409569), and Visit date (7/15/2026). The right column, titled 'GENERAL INFORMATION', contains fields for Visit type (Walk-In), Visiting resident (Harish), Purpose of visit (Describe Purpose of Visit...), Check-in time (1:53 PM), and Check-out time. At the bottom, there's a section for Approval status (Approved) and Visit status (Checked-In).

After the resident approves the request:

- Approval Status is updated to Approved.
- Visit Status is updated to Checked-In.
- Check-In Time is automatically recorded.

This process ensures that only authorized visitors are permitted entry into the society.

7.8 Visitor Check-Out Process

The application tracks both visitor entry and exit activities.

When a visitor leaves the society premises, the Security user opens the visitor record and clicks the Check-Out button.

The screenshot shows the 'Visitor info' and 'GENERAL INFORMATION' sections for a visitor with ID 00026. The 'Check-out' button is highlighted with a red box in the top right corner. The 'Check-out time' field is empty.

Visitor info	GENERAL INFORMATION
Visitor id VSTR ID - 00026 Visitor name Michael Phone number 96853409569 Visit date 7/15/2026 Approval status Approved Visit status Checked-In	Visit type Walk-In Visiting resident Harish Purpose of visit Describe Purpose of Visit... Check-in time 1:53 PM Check-out time

The application automatically:

- Updates the Check-Out Time.
- Updates Visit Status to Checked-Out.
- Completes the visitor visit cycle.

The screenshot shows the 'Visitor info' and 'GENERAL INFORMATION' sections for a visitor with ID 00005. The 'Check-out time' field is highlighted with a red box and contains the value '12:27 PM'. The 'Visit status' field is also highlighted with a red box and contains the value 'Checked-Out'.

Visitor info	GENERAL INFORMATION
Visitor id VSTR ID - 00005 Visitor name Harish Phone number 8688922349 Visit date 7/14/2026 Approval status Approved Visit status Checked-Out	Visit type Walk-In Visiting resident Harish Purpose of visit Describe Purpose of Visit... Check-in time 9:52 AM Check-out time 12:27 PM

This provides a complete audit trail of visitor movements within the society.

7.9 Society staff Attendance Management

The Society staffs section is used to record and monitor attendance information for staff members working within the society. Examples include:

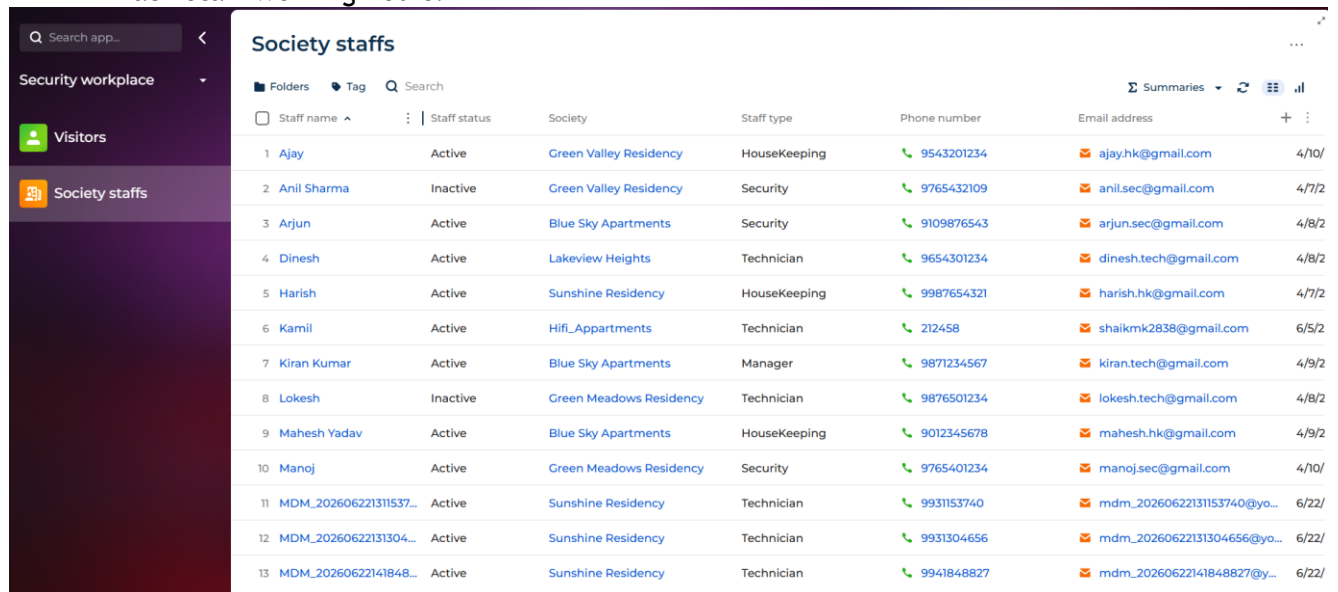
- Security Personnel
- Housekeeping Staff
- Maintenance Staff
- Gardeners
- Other Society Employees

Society staffs List Page

The Society staffs List page displays all staff attendance records maintained within the application.

Security personnel can:

- View attendance records.
- Search staff information.
- Record daily attendance activities.
- Track staff working hours.

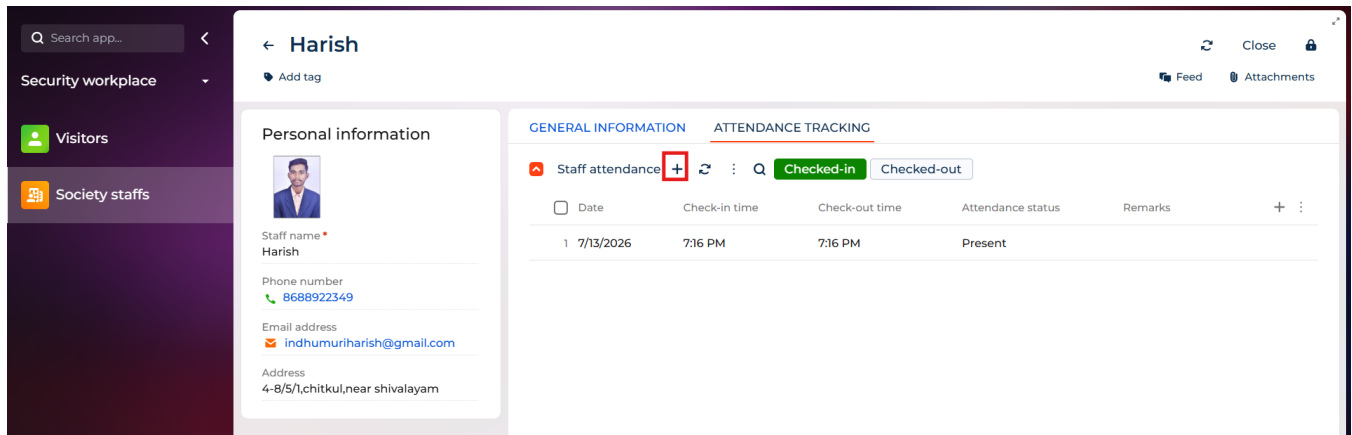


Staff name	Staff status	Society	Staff type	Phone number	Email address	
1 Ajay	Active	Green Valley Residency	HouseKeeping	9543201234	ajay.hk@gmail.com	4/10/
2 Anil Sharma	Inactive	Green Valley Residency	Security	9765432109	anil.sec@gmail.com	4/7/2
3 Arjun	Active	Blue Sky Apartments	Security	9109876543	arjun.sec@gmail.com	4/8/2
4 Dinesh	Active	Lakeview Heights	Technician	9654301234	dinesh.tech@gmail.com	4/8/2
5 Harish	Active	Sunshine Residency	HouseKeeping	9987654321	harish.hk@gmail.com	4/7/2
6 Kamil	Active	Hifi Apartments	Technician	212458	shaikmk2838@gmail.com	6/5/2
7 Kiran Kumar	Active	Blue Sky Apartments	Manager	9871234567	kiran.tech@gmail.com	4/9/2
8 Lokesh	Inactive	Green Meadows Residency	Technician	9876501234	lokesh.tech@gmail.com	4/8/2
9 Mahesh Yadav	Active	Blue Sky Apartments	HouseKeeping	9012345678	mahesh.hk@gmail.com	4/9/2
10 Manoj	Active	Green Meadows Residency	Security	9765401234	manoj.sec@gmail.com	4/10/
11 MDM_202606221311537...	Active	Sunshine Residency	Technician	9931153740	mdm_20260622131153740@yo...	6/22/
12 MDM_20260622131304...	Active	Sunshine Residency	Technician	9931304656	mdm_20260622131304656@yo...	6/22/
13 MDM_20260622141848...	Active	Sunshine Residency	Technician	9941848827	mdm_20260622141848827@y...	6/22/

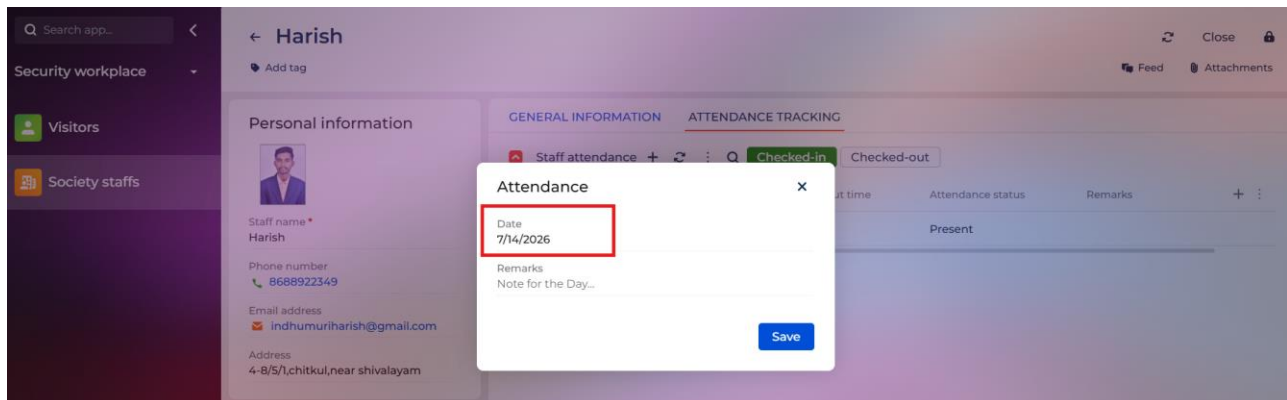
7.10 Creating Daily Attendance Records

To record attendance for a staff member:

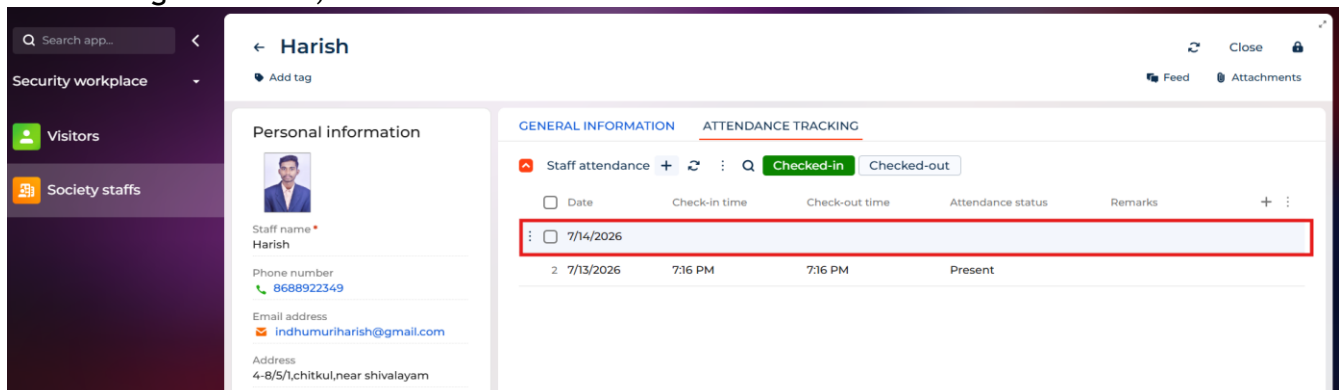
1. Navigate to the Society Staffs section.
2. Select the staff Record C goto Attendance tracking tab
3. Click Add.
4. Create a new attendance record.



The application automatically populates the current attendance date.

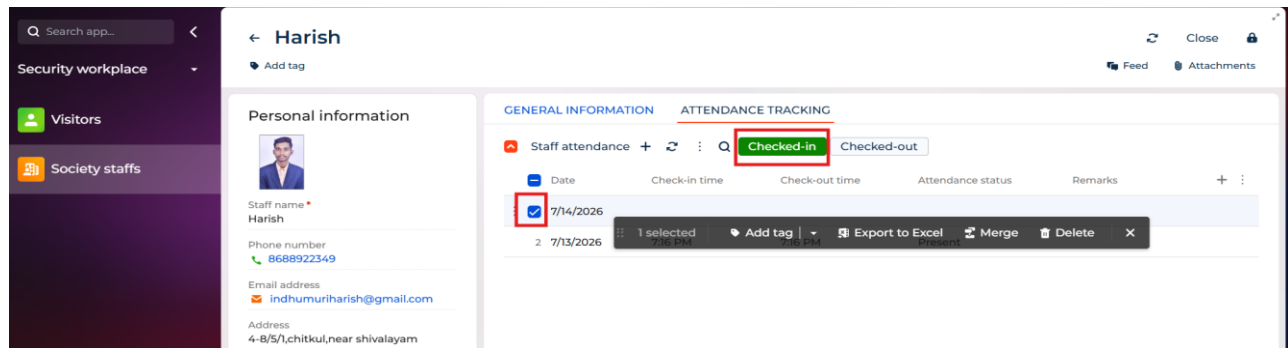


After saving the record, attendance activities can be recorded.



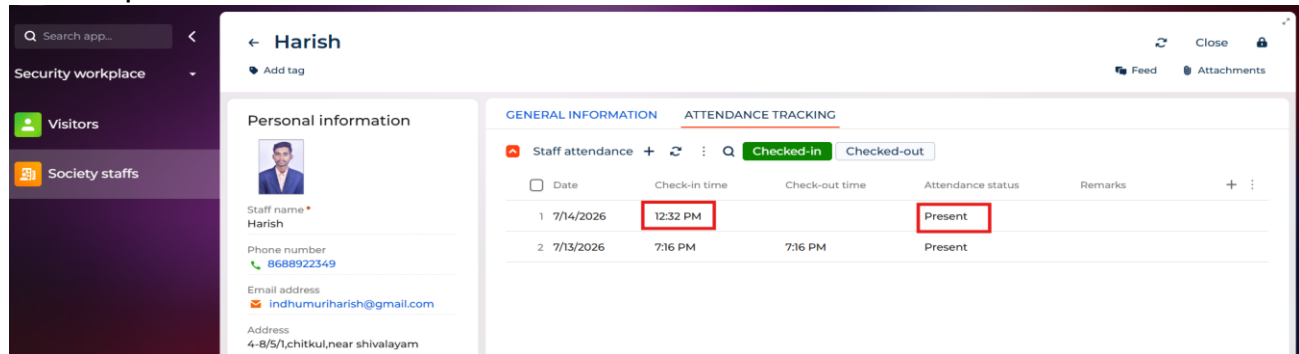
7.11 Staff Check-In Process

When a staff member arrives for work, the Security user opens the Staff record and selects attendance record and clicks the Check-In button.



The application automatically:

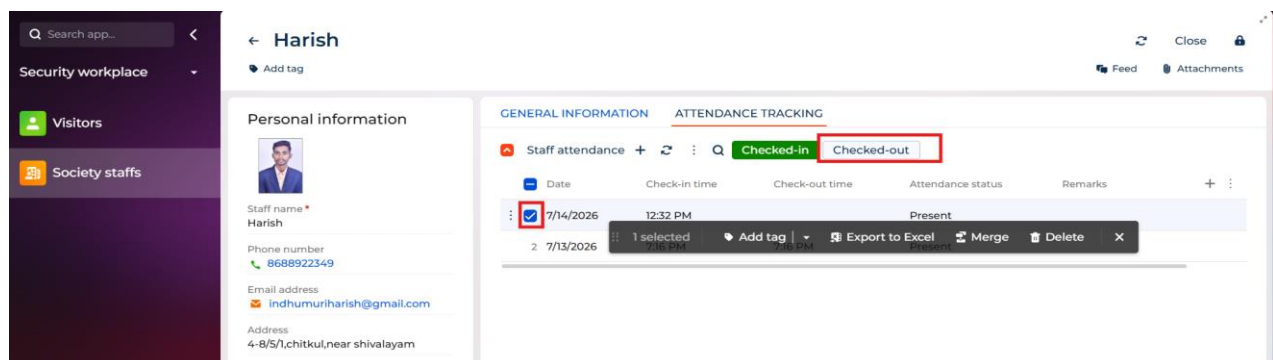
- Records the Check-In Time.
- Updates Attendance Status to Present.



This ensures that staff attendance is accurately captured.

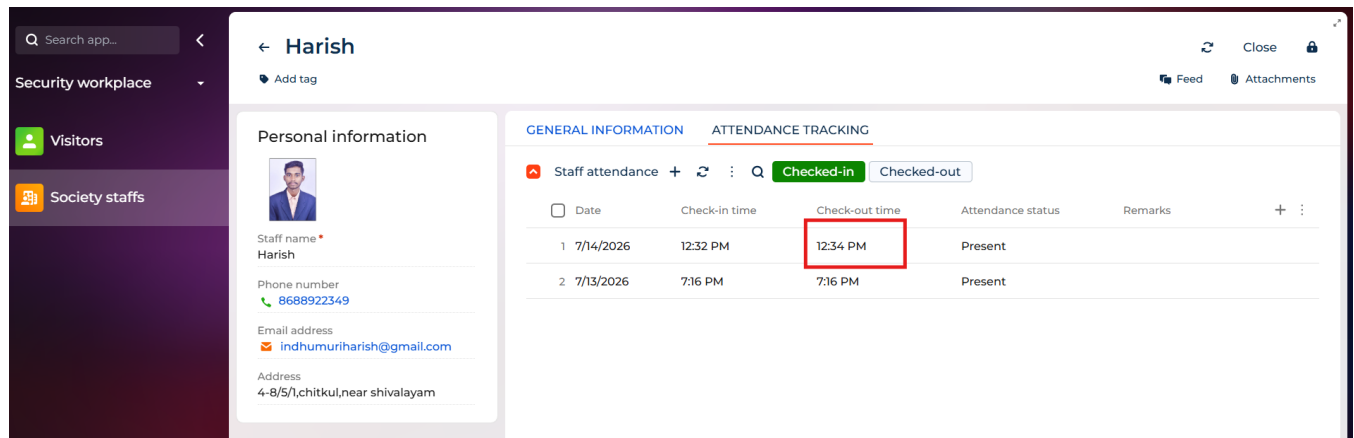
7.9 Staff Check-Out Process

When the staff member completes their work and leaves the society, the Security user opens the Staff record and selects the attendance record and clicks the Check-Out button.



The application automatically:

- Records the Check-Out Time.
- Updates attendance information.
- Completes the attendance cycle for the day.



This allows administrators to track staff working hours and attendance history accurately.

7.10 Summary

The Security module enables efficient management of visitor activities and staff attendance.

Through this module, security personnel can:

- Manage visitor approvals.
- Record visitor entry and exit activities.
- Track visitor history.
- Maintain staff attendance records.
- Ensure secure and controlled access to the society premises.

This contributes to improved security, operational efficiency, and accurate record management within the society.

8.Frequently Asked Questions (FAQ)

1. How can a new resident access the application?

A new resident receives temporary login credentials from the society administration. After logging in, the resident completes the registration process and submits the request for approval. Once approved, permanent login credentials are provided.

2. Can a resident view information belonging to other residents?

No. Residents can only access and manage information related to their own unit and profile.

3. How can a resident add family members, vehicles, or domestic staff?

Residents can navigate to their resident record and use the corresponding sections to add and maintain family member, vehicle, and domestic staff information.

4. What happens when a complaint is raised?

The complaint is routed to the administrator for review and resolution. Once resolved, the resident is requested to confirm the resolution before the complaint is officially closed.

5. How does visitor approval work?

For walk-in, service, and delivery visitors, security personnel submit an approval request to the resident. Entry is permitted only after approval is received.

6. What is a pre-approved visitor?

A pre-approved visitor is a visitor registered in advance by the resident. Security personnel can process these visitors without requesting additional approval.

7. How can a resident pay an invoice?

The resident can open an invoice and select the Pay Now option. After submitting payment details, the payment is routed to the administrator for approval.

8. What happens if only part of the invoice amount is paid?

The invoice status becomes Partially Paid. The resident can later submit additional payments until the invoice is fully settled.

9. How can residents view society announcements?

Residents can access the Announcements section within their resident record to view all published notices and updates.

10. Who can approve payments?

Only administrators are authorized to review and approve payment submissions.

9.Support Information

For assistance regarding application access, resident registration, visitor management, invoices, payments, complaints, or any other application-related issues, please contact the society administration team.

For technical support or system-related concerns, users should reach out to the designated application support team.

Support Email: info@ai4process.com

Thank you for using ai4 society connect.