

Getting Started

A practical guide for Admin Users

SEPTEMBER 2019

Contents

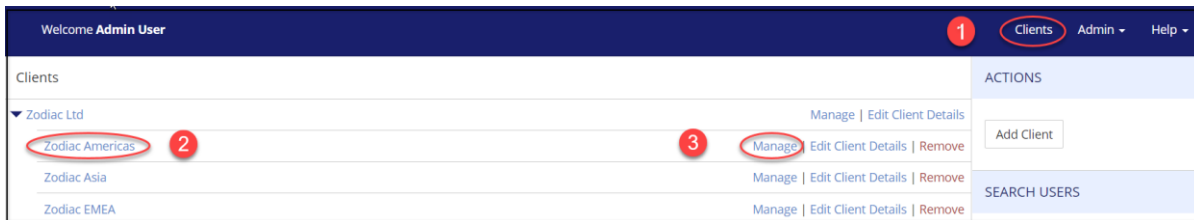
- MANAGING VISAS3**
- 12.01 ADD VISA DATA 3**
- 12.02 EDIT VISA DATA 4**
- 12.03 DOWNLOAD VISA DATA 6**
- 12.04 DELETE VISA DATA 7**
- 12.05 VISA DOCUMENTS 8**

MANAGING VISAS

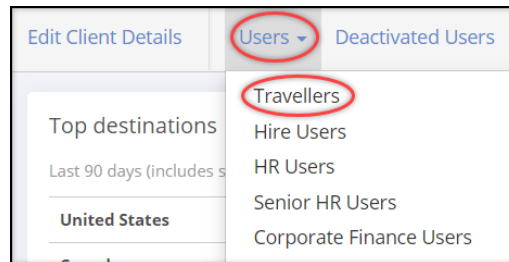
12.01 Add Visa Details

To add a visa:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.



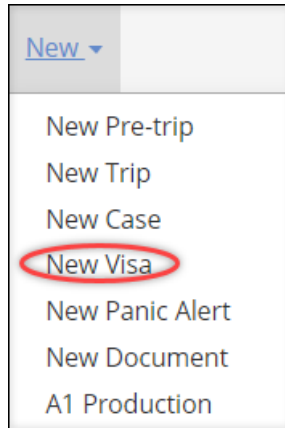
5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		View Edit Deactivate
Melissa	True	Spain	Spain		View Edit Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View Edit Deactivate

7. Select New



8. Select New Visa from the drop-down options.



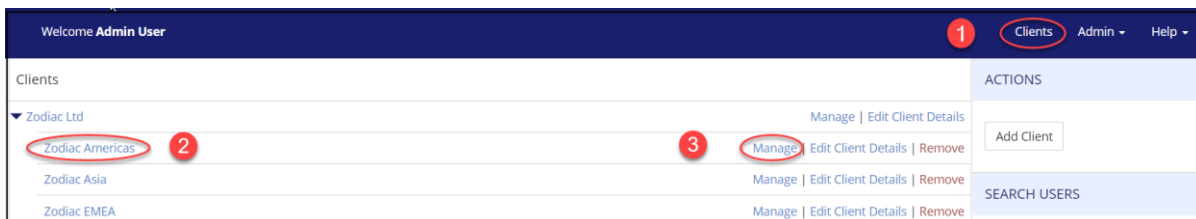
9. Enter visa details and select Create Visa

A screenshot of the 'New Visa' form. The form has several fields: '* Country' with a dropdown menu showing 'Select an Option', '* Visa type' with a text input field, '* Visa start date' and '* Visa end date' with date input fields. At the bottom, there are two buttons: 'Add a document' and 'Create Visa' (highlighted with a yellow and red border).

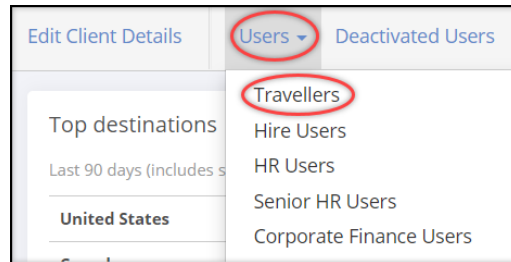
12.02 Edit Visa Data

To view and edit visa details:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.

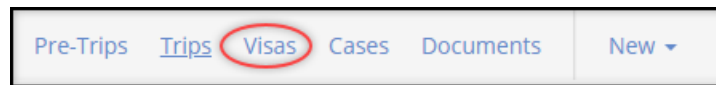


5. Select the traveller

6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		6 View Edit Deactivate
Melissa	True	Spain	Spain		View Edit Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View Edit Deactivate

7. Select Visas



8. Select View/Edit

COUNTRY	STATE	FROM	TO	VISA TYPE	VISA START DATE	VISA END DATE	ALERTS	
Argentina		18 Jan 2019	18 Feb 2019	BUSINESS VISA (24H)	06 Feb 2018	06 Mar 2018	⚠	6 View/Edit Remove
Algeria		18 Jan 2019	18 Jan 2019				⚠	View/Edit Remove

9. Make necessary changes. Select Update Visa

Edit Visa

* Country
Argentina

* Visa type
BUSINESS VISA (24H)

* Visa start date
10 Jan 2019

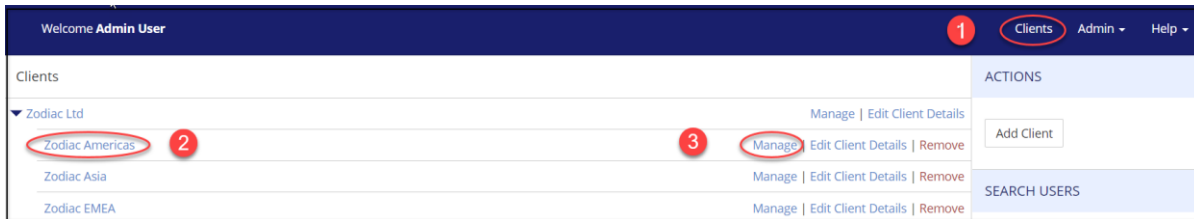
* Visa end date
18 Feb 2019

Add a document Update Visa

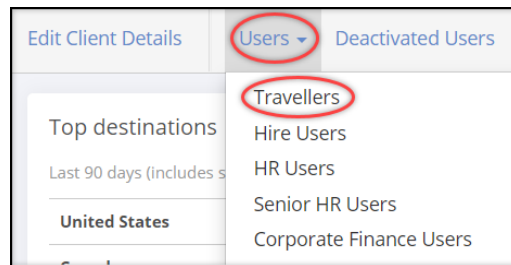
12.03 Download Visa Details

To view and edit visa details:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.



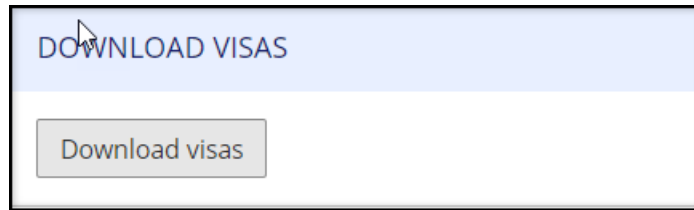
5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		View Edit Deactivate
Melissa	True	Spain	Spain		View Edit Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View Edit Deactivate

7. Select Visas



8. Select Download Visas

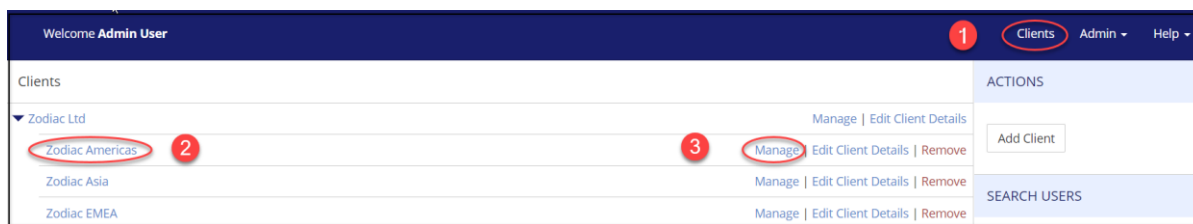


First name	Last name	Email	Visa country	Visa type	Start date	End date
Bob	Brown	Bob.brown@email.com	Austria	POSTED WORKER (6 MONTHS OR LESS)	20190124	20190726
Bob	Brown	Bob.brown@email.com	United States	(ESTA) ELECTRONIC SYSTEM FOR TRAVEL AUT	20190204	20190504
Bob	Brown	Bob.brown@email.com	France	BRITISH PASSPORT HOLDER - BRITISH CITIZEN	20190206	20190306

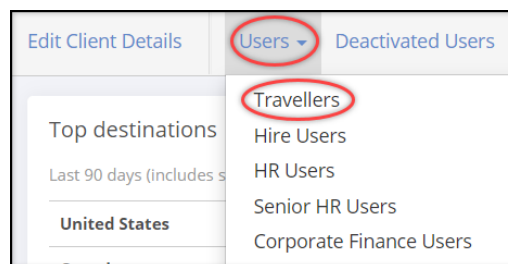
12.04 Delete Visa Data

To delete visa details:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.



5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		View Edit Deactivate
Melissa	True	Spain	Spain		View Edit Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View Edit Deactivate

7. Select Visas



8. Select Remove

COUNTRY	STATE	FROM	TO	VISA TYPE	VISA START DATE	VISA END DATE	ALERTS	
Argentina		18 Jan 2019	18 Feb 2019	BUSINESS VISA (24H)	06 Feb 2018	06 Mar 2018		View/Edit/Remove
Algeria		18 Jan 2019	18 Jan 2019					View/Edit/Remove

12.05 Visa Documents

You can add documents related to a visa:

1. Follow the instructions to edit a visa
2. Select Add a Document on the Edit Visa screen

Edit Visa

*** Country**

*** Visa type**

*** Visa start date** *** Visa end date**

3. Add the document name, select the CSV document from your files

*** Name**
 Scanned Visa

*** Upload**
 Choose File No file chosen

When a document has been added to a visa file, it will be clearly shown in the list of visas on file for the traveller.

VISA TYPE	VISA START DATE	VISA END DATE	COUNTRY	DOCUMENTS
E-VISITOR (651) VISA	June 12, 2018	January 18, 2019	Australia	Copy of Visa

To download a copy of the document, click on the document name.