

QMATIC

Manual

Concierge

264.01I

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1. What's new

Version	Chapter	Change
01.A	General	Create separate manual for Concierge
01.B	2.1.1 Requirements	Update Android and iOS version compatibility
01.C	Installation and setup	Add Concierge Elo Touch as unit type template
01.D	Installation and setup	Add custom fields as configuration option
	Using Concierge	Add custom info as column in queue view
01.E	Installation and setup	Add options for country code to the list of settings on equipment profile level in the unit type.
01.F	Using Concierge	- Add option to select language in Confirm step when creating a visit. - Add information about warning message if customer checks in too late or too early.
01.G	Installation and setup	Add option to set a visit limit per service.
	Using Concierge	Add information about warnings for late and early check-ins.
		Add option to find appointment by searching for date of birth.

Version	Chapter	Change
01.H	• Installation and setup	• Add information about configuring and using Marks. • Add information about configuring a custom field to accept time input.
01.I	• Installation and setup	• Add option to make Marks mandatory or optional.

2. Installation and setup

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2.1 General Information

Concierge gives you the possibility to run a reception app on a tablet or in a desktop browser.

2.1.1 Requirements

- If you use Concierge on a tablet, the tablet should be 7 in, or larger.
- Recommended browsers: Google Chrome, Internet Explorer 11, Firefox.
- We recommend that you use a stable Wi-Fi connection, conformed to the number of users.
- It is possible to use an Ethernet connection with Concierge for tablets, but only with devices that support Ethernet connection. Please contact Global Support, for more information

2.2 Installation

If you install Concierge from Xtend, please proceed to step 3.

1. Copy connectconcierge.war to <Orchestra_install_dir>\system\deploy.
2. Add the file connectConciergeMessages.properties to <Orchestra_install_dir>\system\conf\lang.
3. Create roles and users. See “2.3.1 Access rights” on page 5.
4. Do the rest of the setup by adding and configuring unit types, setting up the calendar, etc.

This will install Concierge on Orchestra Central. For distributed agents, you need to create an agent profile which contains Concierge and then perform a remote upgrade. For more information about remote upgrade, see the Reference Manual.

Note that Orchestra installation package comes with an older version of Concierge. This installation should replace that version.

2.3 Set up Concierge

The following section describes how to set up Concierge.

After installing Concierge in Orchestra, you should configure the following:

- users and roles
- unit types
- calendar
- notifications

Below we will go through these steps in more detail.

2.3.1 Access rights

In the User Management application, select the wanted roles for the users that will be using Concierge. There are two roles to choose between:

- ConciergeAppointmentUser - can run both Concierge visit and appointment work flows on assigned branches.
- ConciergeVisitUser - can run only Concierge visit work flows on assigned branches.

⚠ The ConciergeVisitUser and ConciergeAppointmentUser roles have the correct modules when starting Orchestra. This means that if any of the required modules have been removed from those users, they will be added again the next time Orchestra starts.

2.3.2 Concierge unit types

There are several unit types for Concierge, depending on which hardware you use together with the application:

- Concierge
- Concierge Button
- Concierge Touch
- Concierge Elo Touch

For more information about the unit types, please see the Standard Unit Types Guide. The sections below describe what commonly needs to be considered for the Concierge unit types.

2.3.3 Add unit types on global level

1. In System Administration, add the wanted unit type template or templates.

If you want to use notifications, make sure that the Notification unit type template is added.

2. Check if there is any configuration you need to do. On this level, you can for example enter a privacy policy.
3. Save.

2.3.4 Configure unit types on equipment profile level

1. Go to **Business Configuration > Operation Profile**, and add the Concierge and Notification unit types to the desired equipment profiles.
2. Several parameters must be configured on this level. For example:

- an auto close value, i.e a time after which Concierge logs out the user if he/she has been inactive.



The Auto close value must be less (in seconds) than the shiro time-out value, set on the server.

- which flows that the users should have access to
- which kinds of transfer between queues that should be allowed
- if it should be possible to remove visits and cancel/reschedule appointments
- which time interval that should be displayed as default in the appointment list for upcoming appointments
- which notification method options (sms/email/ticketless) that should be available



Even if email is enabled, it won't be possible to select email as notification method when arriving appointments or creating visits.

- if it should be possible to add notes
- if custom fields should be enabled. Custom fields allow staff to enter additional information during the Create Visit flow, which is then saved with the visit and displayed in the queue view. You can also use the "Custom parameter time input" setting to format one of the custom fields as time input. For more information, see "2.3.9 Configuring a custom field to accept time input" on page 10.
- if you want to be able to use QR codes to identify visits or appointments. For more info, see "2.3.8 Using QR codes in Concierge" on page 10.
- the default country code in phone number fields and preferred countries to be displayed in the top of the list of country codes.
- if you want to use VIP Levels.
- if you want to support multi-branch (allows users to books appointments in another branch) and multi-service (allows users to add several services)
- if you want to show estimated wait time

-
- if you want to enable Marks (labels). For more information, see “2.3.10 Using Marks” on page 11.
 - which services should be available for quick serve
 - if customer search fields should be hidden

If you use any of the unit types with hardware (e.g. Concierge Elo Touch), you also need to configure the settings related to the hardware.

3. Save.

2.3.5 Configure unit types on branch level

1. In Business Configuration > Branches, configure the settings on branch level. On this level, you can for example set the IP address of printers and card readers.
2. Save and publish each branch.

2.3.6 Calendar

ⓘ If you will be using appointments together with Concierge, make sure that your calendarUser has access to the correct branches.

To use appointment, the Calendar must be configured. In addition to the normal setup, the following steps should be specifically considered for Concierge:

- Make sure that you have configured the **Reservation Expiry Time** setting on the System Settings tab to your liking. This will determine how long time you have to finish creating an appointment after you have chosen a time slot. The default time is 600 seconds.

Online Booking settings

Reservation Expiry Time seconds

Unique customer identifier field

Pre-populate appointment data on startup ☐

- On the Services tab, consider if you want to add **Additional customer duration** time to your services.

Edit Service

Name

Service 1

Active

☒

Duration

5

min.

Additional customer duration

3

x

min.

Orchestra Service Id

1

Enable public booking

☒

Public Id

7639e551e759c4e644b4af1e71d7c0934ed!

Save changes

Cancel

ⓘ Note that Concierge automatically selects available dates and time slots depending on how the Calendar Admin application is set up.

- When creating your appointment profile(s), you should consider the **Allow booking** setting, as in the picture below:

The screenshot shows the 'Edit Appointment Profile' window. On the left, there's a list of services: Drivers License, Insurance Car, Insurance House, Loan Car, Loan House, S1, S2, S3, and S4. The 'Name' field is set to 'AP1'. The 'Resource Group' is 'RG1'. The 'Week Schedule' is 'Fullweek'. The 'Allow booking' section, highlighted with a red box, shows '0 days' and '15 minutes from now'. Below this, 'for a period of' is set to '28 days', 'Slot interval' is '5 minutes', and 'Booking Threshold' is '80%'. At the bottom right, there are 'Save changes' and 'Cancel' buttons.

This setting will have affect on number of days and minutes from now that booking should be allowed.

The appointment profiles also determine which services can be booked in combination when creating appointments in Concierge.

Time and date convention

You can choose if you want to use AM/PM or 24 hour, and which date format you want (for example YY-MM-DD or YY/DD/MM). This affects how you see the time and date in Concierge. Go to System Administration > Parameters > General Parameters > System > Time Convention/Date convention to change the settings to your liking.

2.3.7 Notifications

If you are going to use notifications together with Concierge, consider the following:

- Make sure that you have configured Visit Create notifications and Appointment Confirmation notifications, since they are mandatory when using all the flows in Concierge
- For the appointment confirmations, check that the **Check Interval (Minutes)** setting is set to your liking. This setting may cause a delay if it is set to a high number.
- Make sure that you select Other Appointment field (please specify) in the Phone Field drop-down list. Then, enter phoneNumber in the field below.
- If you want to use a QR code in your email messages, you need to use the **qrCodeInternalId** parameter and we recommend that you select **HTML** as Content Type. This way the QR Code will be included in the email, instead of in an attachment.

2.3.8 Using QR codes in Concierge

Using QR codes requires that a QR code is included on the ticket layout, which is created in the Surface Editor application. The supported QR code types are QR Code (containing a Ticket ID) and the Mobile Ticket URL QR Code (containing a branch ID and a ticket ID).

To use QR codes in desktop mode for Concierge, a scanner needs to be installed. The QR scanner must be programmed to interpret all characters as American English.

If you place the mouse pointer in a text editor, and then scan the QR code it will look something like this:

```
{"appointment_id":"605","branch_name":"Gothenburg","branch_id":"2","appointment_date":"2019-03-17T11:45:00"}
```

2.3.9 Configuring a custom field to accept time input

You can configure a custom field to accept time input. This is useful for recording appointment times when the booking is managed outside of Qmatic's appointment products.

ⓘ This option is primarily used when appointment bookings are managed through third-party applications. In these cases, staff can manually enter the appointment time during visit creation. If you use the Qmatic Appointment Booking app, the appointment time is transferred automatically and does not need to be entered manually.

Enable Appointment Time

1. Open the Unit Type Template (UTT) settings for the relevant unit type in System Administration.
2. In the Custom parameter time input field, select one of the predefined custom parameters from the drop-down list (for example, custom2, custom3, etc.).
 - The selected parameter will be treated as a time field in the Visit Creation flow, helping staff enter times consistently and in the correct format.
 - The system uses the time format of the current device (for example, HH:MM).
3. Save your changes.

Using Appointment time

Once enabled, staff will see an **Add time** option on the Visit Information card during visit creation.

When a time is entered, it appears as Added time on the Visit Information card (see screenshot in "3.10 Creating a visit" on page 36).

2.3.10 Using Marks

The Marks feature allows staff to tag visits with predefined labels (marks) during visit creation. Marks can be used to segment visits, track appointment types, and improve reporting.

Marks are configured in the Business Configuration and can be enabled for Concierge through the Unit Type Template (UTT) settings.

Enable Marks

To enable Marks in Concierge:

1. Open the UTT settings for the relevant unit type in your equipment profile.
2. In the **Enable marks** field, select one of the following options:
 - **No item selected** – Marks are not available in the Create visit flow.
 - **Optional** – Marks are available in the Create visit flow, but not required.
 - **Mandatory** – Marks must be added in the Create visit flow. It is not possible to create a visit without selecting at least one mark.
3. If you select Optional or Mandatory, you need to use the **Marks type** field to define the mark types that are available during check-in. There are three ways to configure this:
 - * – selects all mark types (except for NPS, the system default mark type for Net Promoter Score).
 - Marktype1, Marktype2 – selects only the entered mark types.
 - Exclude: Marktype1, Marktype2 – excludes the entered mark types.

ⓘ If you leave the Marks type field empty, the system uses a placeholder text ("Marks"). If Enable marks is set to Mandatory and no mark type called Marks is defined, it will not be possible to complete the Create visit flow.

ⓘ Using a combination of methods is not supported. Mark types are managed in the System administration application.

2.3.11 Limit number of tickets for a service

You can show a warning when the number of tickets created for a service during one day has reached a set limit.

ⓘ Staff can choose to ignore the warning and create the visit anyway.

Prerequisites

- Service Scheduler version 7.0.34 is required

Set visit limit for Concierge

1. Go to Service Scheduler and open a service or a template.
2. Find the **Maximum number of tickets** setting and set a limit if not done before.
3. Enable **Use Max Ticket in Concierge**.
4. Repeat for all services or templates that should have a limit.
5. Save.

3. Using Concierge

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3.1 Introduction

This guide presents the standard procedures and features in Concierge.

With Concierge, you are able to provide more personalized and better service in meet and greet situations.

With Concierge, you can do the following:

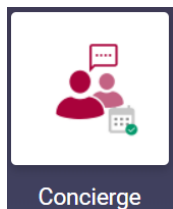
- ✓ Create and remove visits
- ✓ Create appointments
- ✓ Edit and remove appointments
- ✓ Arrive appointments
- ✓ Create customers
- ✓ Edit customers
- ✓ Cherry-pick visits to serve
- ✓ Transfer visits
- ✓ Quick serve

ⓘ What functionality you have in Concierge often depend on the system configuration. In this guide we will go through all available features. If there is a feature that you don't have access to, but you think you should, please contact your system administrator.

3.2 Getting started with Concierge

To get started with Concierge in a desktop browser, please follow these steps:

1. Go to `http:<orchestra-ip>:<port>`
2. Click the **Concierge** icon on the Orchestra home page.



3. Select branch and service point. Check the check box if you want this to be your default setting. When done, click **Apply Settings**.

Select your profile settings

Branch

Downtown General ▼

Select service point

Concierge

☐ Skip next time

Cancel Apply settings

ⓘ If you only have one service point configured in your system, this will be preselected. Also note that it is possible for several users to use the same service point.

3.3 Start page

On the start page of Concierge, you will find the following main parts

- Top bar - see “3.4 Top bar” on page 16.
- Queue view - see “3.5 View queue information and edit visits” on page 17.
- Quick serve - see “3.6 Quick serve” on page 23.

- Create appointment - see “3.7 Creating an appointment” on page 24.
- Arrive appointment - see “3.9 Checking in an appointment” on page 32.
- Edit appointment - see “3.8 Rescheduling or canceling an appointment” on page 30
- Create visit - see “3.10 Creating a visit” on page 36.
- Accessibility statement - in the bottom right corner, there is a link to the accessibility statement.

3.4 Top bar

In the top bar of the start page, you have a few options, described below.

3.4.1 Log out



To log out from Concierge, click **Log out**.

You will be automatically logged out due to the following:

- Nightly reset - when the system does a nightly reset
- Publish - when an administrator publishes a branch
- Auto close - when you are inactive

3.4.2 Return to Orchestra home page



To return to the Orchestra home page, click **Home**. This icon is only visible in desktop mode.

3.4.3 Change branch or service point



To change which branch or service point you are working from, click **Edit**.

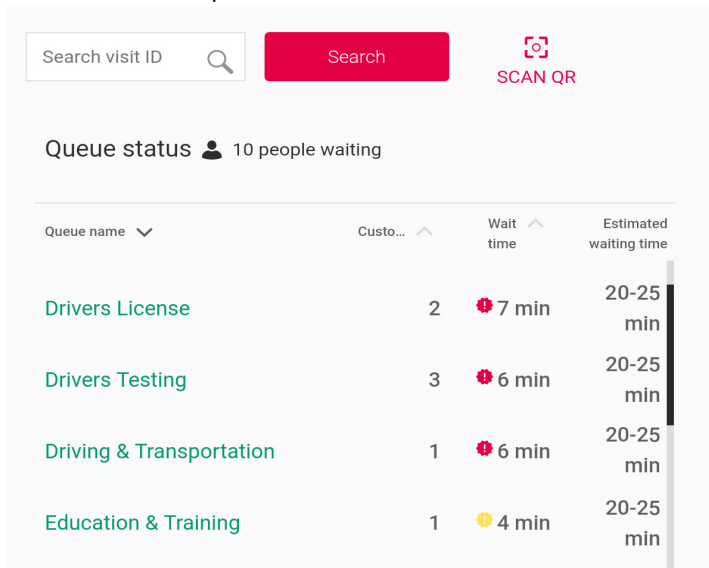
3.4.4 View the online help



To view the online help, click **Help**. This icon is only visible in desktop mode.

3.5 View queue information and edit visits

On the start page, you can see the queue view. The queue view shows information about the different queues.



Search visit ID   

Queue status  10 people waiting

Queue name 	Custo... 	Wait time 	Estimated waiting time
Drivers License	2	 7 min	20-25 min
Drivers Testing	3	 6 min	20-25 min
Driving & Transportation	1	 6 min	20-25 min
Education & Training	1	 4 min	20-25 min

For every queue, you can see:

- **Customers** – the number of customers waiting
- **Wait time** – the longest time someone in the queue has waited. You can also see an indication if the queue is close to passing Service Level Agreement (yellow icon) or has already passed it (red icon).
- **Estimated waiting time** – the estimated waiting time in intervals of 5 minutes

You can sort the queues by queue name, number of customers, or wait time.

Click on a queue to see all visits in that queue. For each visit, you can see:

- Ticket number
- Notes
- Custom info
- Customer name
- Service
- Appointment time
- Wait time

< DRIVING & TRANSPORTATION  5				
Ticket	Notes	Name	Appointment time	Wait time
A001		-	-	6 min
A003		-	-	5 min
A004		-	-	5 min
A006		Jess Davis	-	1 min
A007		-	-	1 min

Send link to virtual ticket

You may want to be able to send a link to a virtual ticket to a customer. For example if the customer has taken a paper ticket but want to wait elsewhere and monitor the queue position online.

1. Find the visit, either by searching for it the Search visit ID search box, by scanning the QR code on the ticket, or by finding it manually in the queue.



2. When the Visit options box is opened, Select **Activate SMS ticket**



3. Enter the customer's phone number and click **Send** ➤.

3.5.1 Transfer a visit

If you want to transfer a visit to another queue, staff member or counter pool, please follow these steps.

1. First you have to find the visit. You can do this by one of the following means:
 - Click the queue name and scroll until you find the wanted visit.
 - Search for a visit in the search field by entering the visit ID.
 - Click **Scan QR** and scan the ticket QR code.

-
2. When you have found the visit, select one of the following transfer options, described in detail below:

A1504 VISIT OPTIONS

 Transfer to queue

 Transfer to staff member

 Transfer to counter pool

 Remove

 Serve

- “Transfer to queue” on page 19
- “Transfer to staff member” on page 20
- “Transfer to counter pool” on page 21

Transfer to queue



Click **Transfer to queue** and a window showing available queues will be expanded:

< A1504
QUEUE
✕

🔍

Queue name ▾	First in line	Last in line	Based on waiting time
Building & Planning			
Drivers License			
Drivers Testing			
Driving & Transportation			
Education & Training			
Immigration			

Select the wanted queue and if the visit should be placed:

- First in line
- Last in line.
- Based on waiting time

Transfer to staff member



Click **Transfer to staff member** and a window showing available staff members will be expanded. Available staff members are staff members that are logged in to a service point where a visit can be called (i.e *not* Concierge), in your branch:

< A1504
STAFF MEMBERS
✕

Name

Emma Jones

Select the wanted staff member to transfer the visit to him/her.

Transfer to counter pool



Click **Transfer to counter pool** and a window showing available counter pools will be expanded. You will see the counter name as well as its if it is open (no icon) or closed (padlock icon).

< A1504
COUNTER POOL
✕

SERVICE POINT ▼

WebCounterMultiStaff

Connect

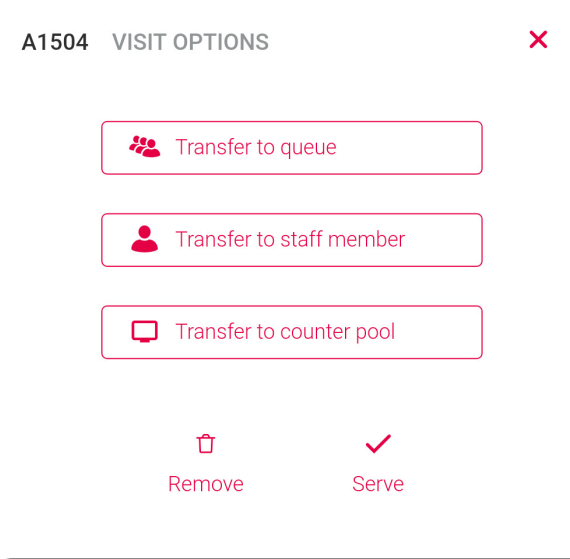
Select the wanted counter pool and confirm the action.

3.5.2 Serve or remove a visit

If you want to serve a visit out of queue order, or remove a visit, follow these steps.

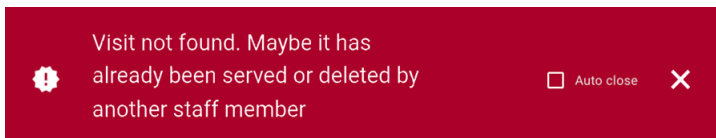
1. First you have to find the visit. You can do this by one of the following means:
 - Click the queue name and scroll until you find the wanted visit.

- Search for a visit in the search field by entering the visit ID.
 - Click **Scan QR** and scan the ticket QR code.
2. When you have found the wanted visit, choose if you want to **Serve** ✓ or **Remove** 🗑️ the visit.



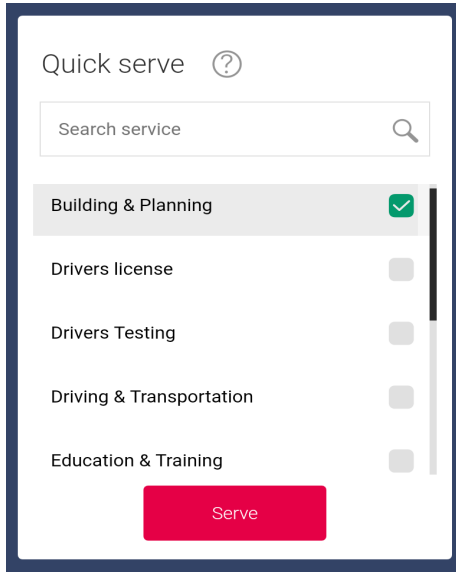
ⓘ The Serve icon will be disabled for visits that require an outcome or a delivered service.

If you try to remove a visit that has already been served, or deleted, by someone else, you will get an error message:



3.6 Quick serve

On the start page, there is a quick serve functionality.

A screenshot of a web interface titled "Quick serve" with a help icon. It features a search bar labeled "Search service" with a magnifying glass icon. Below the search bar is a list of services: "Building & Planning" (selected with a green checkmark), "Drivers license", "Drivers Testing", "Driving & Transportation", and "Education & Training". At the bottom of the list is a red button labeled "Serve".

Service	Status
Building & Planning	☒
Drivers license	☐
Drivers Testing	☐
Driving & Transportation	☐
Education & Training	☐

Select a service and then click **Serve**. You have now created, called, and ended a visit by clicking just one button.

Limitations for quick serve

- Services that require that a delivered service or outcome is set, are not supported and are therefore not listed in the quick serve area.
- It is not possible to select several services.

3.7 Creating an appointment



To create an appointment:

1. On the start screen, select **Create appointment**.

Once the flow has been launched, you will see a top bar showing the current step, as well as the available steps in the flow.

2. By default, the step Select branch is bypassed, and your default branch is automatically selected.

If you want to select another branch, go to **Select branch**:

The screenshot shows the 'Select branch' step in a dark-themed navigation bar at the top. The bar contains icons and labels for 'Create appointment', 'Select branch' (highlighted in red), 'Select service', 'Date & Time', 'Add customer', 'Confirm', and 'Cancel'. Below the bar, the 'Select branch' screen is displayed. It features a 'Selected branch' field with 'Downtown General' and a trash icon. A search field with a magnifying glass icon is labeled 'Search branch'. To the right of the search field is a checkbox labeled 'Skip this step' with a question mark icon. Below these elements is a list titled 'ALL BRANCHES' containing four items: 'Downtown General', 'Gothenburg', 'LongBeach', and 'Los Angeles'. Each item has an information icon (i) to its right. At the bottom right of the screen is a red 'DONE' button.

Select a branch from the list or search for it in the search field. When a branch is selected, the flow will continue automatically. It is only possible to select one branch at a time.

If you always want the Select Branch step to be expanded when creating an appointment, deselect the **Skip this step** check box.

3. In the Select service step, a list of services is shown.

The screenshot shows a dark navigation bar at the top with the following steps: 'Create appointment' (with a calendar icon), 'Select branch', 'Select service' (highlighted in white), 'Date & Time', 'Add customer', 'Confirm', and 'Cancel'. Below the navigation bar, the 'Select service' section features a search bar labeled 'Search service' with a magnifying glass icon. To the right of the search bar is a checked checkbox labeled 'Enable multiservice' followed by a help icon. Below this is a section titled 'ALL AVAILABLE SERVICES' which contains a list of services: 'Building & Planning', 'Drivers license', 'Drivers Testing', 'Driving & Transportation', 'Education & Training', 'Immigration', and 'License Renewal'. Each service item has an information icon (i) to its right.

Select the wanted service(s) from the list or search for services in the search field. To be able to add more than one service, select the **Enable multiservice** check box.

Once you have selected a service, the list of services under All Available Services list will only contain the services that can be booked in combination with the first selected service.

When you have added all the wanted services (max. five), click **Done**.

4. Pick a date and time for the appointment.

Create appointment

Select branch

Select service

Date & Time

Add customer

Confirm

Cancel

Select date & time

Customers - 1 +

Downtown General

<

JANUARY 2019

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Wednesday 23 January

Available timeslots

No available timeslots for AM

AM

3:25 PM

3:30 PM

3:35 PM

3:40 PM

3:45 PM

3:50 PM

3:55 PM

4:00 PM

PM

4:05 PM

4:10 PM

4:15 PM

4:20 PM

4:25 PM

4:30 PM

4:35 PM

4:40 PM

4:45 PM

4:50 PM

4:55 PM

5:00 PM

- Select the desired number of customers. This can be used if the appointment is booked for e.g. a family. Updating the number of customers will update the list of available time slots.
- Select a date for the appointment. The current date is marked with green. If a date in the calendar is *not* available for booking, it is not clickable.
- Select a time for the appointment. Available timeslots are displayed in a scrollable list which is filtered into different time intervals. The interval for the current time is displayed by default.
- As soon as you select a timeslot, a widget counting down will be displayed. This shows how long you have to finish the reservation.

Reservation
will expire in:
09:59

⚠ If you have selected a time slot and then change the number of customers, you need to select a new start time and the reservation time will be restarted.

5. Add a customer to the appointment. You can either link an existing customer or add a new customer.

Reservation will expire in: 09:53

Select customer

LINK EXISTING CUSTOMER

Search customer

Search customer by phone number, mail, first or last name

OR ADD NEW CUSTOMER

First name required Last name required

Email

Phone number

Date of birth

Month Day (DD) Year (YYYY)

Month DD YYYY

Link customer

If you want to link an existing customer, enter the first name, last name, email or phone number of the customer in the search field.

ⓘ For phone numbers, a minimum of 5 characters must be entered before the search commences.

Edit customer information



When you search for a customer in the Link customer step, you have the option to edit the customer information by clicking **Edit**. Click **Save & Add** to save the customer record and add the customer to the appointment.

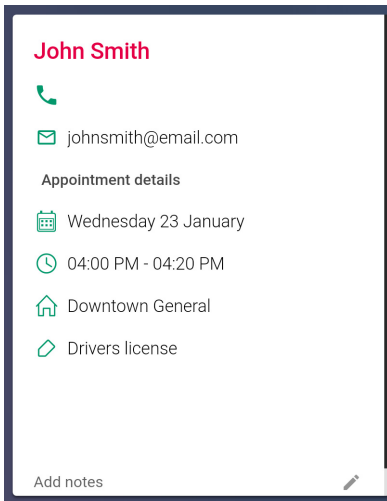
Create new customer

You can also create a new customer in the Add customer step. In the Add new customer section, enter the following information:

- First name
- Last name
- Email
- Phone number
- Date of birth
- Notification language

Click **Save & Add** to create a new customer.

6. The Confirm step is opened, where you can see the details for the appointment.



The screenshot shows a confirmation card for a customer named John Smith. The card is white with a dark blue border. At the top, the name "John Smith" is displayed in red. Below the name is a green phone icon. Underneath is a green envelope icon followed by the email address "johnsmith@email.com". The section "Appointment details" is highlighted in bold. Below this, there is a green calendar icon followed by "Wednesday 23 January", a green clock icon followed by "04:00 PM - 04:20 PM", a green house icon followed by "Downtown General", and a green diamond icon followed by "Drivers license". At the bottom of the card, there is a text input field labeled "Add notes" and a small green pencil icon.

If you want, you can add notes to the appointment.

7. Finally, select notification method.

Reservation
will expire in:
05:30

Select notification method

What type of notification does the customer prefer?

 SMS

 Email

 SMS & Email

8. When done, click **Confirm**. If you have selected e.g. SMS as notification method, and the customer doesn't have a phone number attached, you will be asked to add a phone number. The phone number will be saved to the customer object.

Add customer phone number to
enable SMS

Phone number

Required

Cancel

Finish

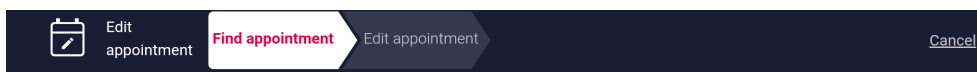
The customer will then receive an SMS or email with the appointment details.

3.8 Rescheduling or canceling an appointment



To reschedule or cancel an appointment:

1. On the start screen, select **Edit appointment**.
2. The first step is to identify and find the appointment. You can find an appointment by the following means:



Find appointment

Appointment list

Booking ID

Customer

SCAN QR

Upcoming appointments 23 January, 02:05 PM - 05:05 PM
Refresh

ID ▾	Name ▾	Service name ▾	Branch ▾	Appointment time ▾	Date ▾	
336	John Smith	Drivers license	Downtown General	04:00 PM	23/01/2019	
338	Jane Doe	Vehicle Registration	Downtown General	04:35 PM	23/01/2019	

- **Appointment list** - All upcoming appointments for the branch that you are logged in to are listed here.



If the appointment you want to edit is not in the list, click **Edit** to select a new time interval. Select a start time and an end time, and click **Apply**.



To refresh the list of appointments, click **Refresh**. After refreshing, the button is disabled for 30 seconds.

- **Booking ID** - Find the appointment by entering the external Appointment ID. Enter the full Appointment ID, then click **Fetch**.
- **Customer** - Find the appointment, by entering a first name, last name, email, or phone number in the search field.



For phone numbers, a minimum of 5 characters must be entered before the search commences.

-  **Scan QR** - Find the appointment by scanning a QR code.
 - a) If you select this option on a tablet, a camera view window will be opened, so that the QR code can be scanned.
 - b) If you select this option in desktop mode, you will be asked to point the installed scanner towards the QR code.
- 3. If you use Booking ID or Scan QR, you will get an exact match. If you use the time filter or search for a customer, you will see a list with all matching appointments. Select the appointment you want to edit.

The Edit appointment step is opened:


Edit appointment
Find appointment
Edit appointment
Cancel

Edit appointment

Selected appointment

04:35 PM
23/01/2019
Jane Doe

Cancel appointment

RESCHEDULE APPOINTMENT

Downtown General


JANUARY 2019


Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Wed 23 January

Available timeslots

No available timeslots for AM

AM	3:40 PM	3:45 PM	3:50 PM	3:55 PM
	4:00 PM	4:05 PM	5:05 PM	5:10 PM
PM	5:15 PM	5:20 PM	5:25 PM	5:30 PM
	5:35 PM	5:40 PM	5:45 PM	5:50 PM

To reschedule an appointment, select a new date and timeslot for the appointment, then click **Reschedule**.

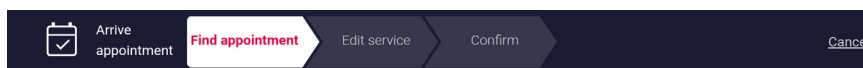
To cancel an appointment, click **Cancel appointment**, and select **Yes** to confirm.

3.9 Checking in an appointment



To check in an appointment:

1. On the start screen, select **Arrive appointment**.
2. Find the appointment in one of the following ways:



Find appointment

Appointment list

Booking ID
 Customer

Appointments today 02:19 PM - 09:00 PM

Refresh

ID	Name	Service name	Appointment time	Date	
344	Sally Smith	Vehicle Insurance +1	04:30 PM	23/01/2019	
342	James Public	License Renewal	04:50 PM	23/01/2019	
345	John Smith	Drivers license	05:40 PM	23/01/2019	
338	Jane Doe	Vehicle Registration	05:45 PM	23/01/2019	

- **Appointment list** - All upcoming appointments for the branch that the user is logged in to are listed here.



If the appointment you want to arrive is not in the list, click **Edit** to select a new time interval. Select a start time and an end time, and click **Apply**.



To refresh the list of appointments, click **Refresh**. After refreshing, the button is disabled for 30 seconds.

- **Booking ID** - Find the appointment by entering the external Appointment ID. Enter the full Appointment ID, then click **Fetch**.
- **Customer** - Find the appointment, by entering a first name, last name, email, phone number or date of birth in the search field.



For phone numbers, a minimum of 5 characters must be entered before the search commences.



- **Scan QR** - Find the appointment by scanning a QR code.
 - a) If you select this option on a tablet, a camera view window will be opened, so that the QR code can be scanned.
 - b) If you select this option in desktop mode, you will be asked to point the installed scanner towards the QR code.
- 3. If you use Booking ID or Scan QR, you will get an exact match. If you use the time filter or search for a customer, you will see a list with all matching appointments. Select the appointment you want to arrive.
- 4. Click **Done** to go to the next step.
- 5. The Confirm step is opened. If you want to edit the services connected to the appointment, click **Edit service** in the top bar before confirming the appointment. Click **Done** when you are ready.

Arrive appointment [Find appointment](#) **Edit service** Confirm [Cancel](#)

Edit service

Selected service 1 Vehicle Insurance 2 Vehicle Registration

Search service

☒ Enable multiservice

ALL AVAILABLE SERVICES

- Building & Planning
- Drivers license
- Drivers Testing
- Driving & Transportation

DONE

6. In the Confirm step, you can see the details of the appointment.

John Smith

johnsmith@email.com

Appointment details

Wednesday 23 January

04:00 PM - 04:20 PM

Downtown General

Drivers license

Add notes

7. You may have the option to select a VIP level for the appointment. It may be called something different in your system. It is a feature that can be used for segmentation of customers into different categories, and may be used for customers with special needs, etc.
8. Select a notification method. Which options you have depends on the settings of your organization. The option **Ticketless** creates a visit, without printing a ticket or sending an SMS.

⚠ It's not possible to choose email as notification method when checking in appointments.

VIP

☐ Level 1 ☐ Level 2 ☐ Level 3

Select notification method

What type of notification does the customer prefer?

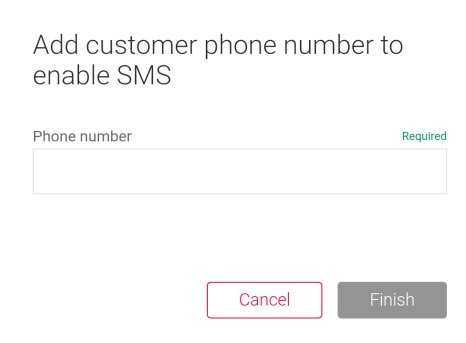
☐ SMS

☐ Print ticket

☐ Ticketless

9. Confirm the check-in.

10.If you have selected SMS as notification method, and the customer doesn't have a phone number saved, you will be asked to add a phone number. Enter a phone number and click **Finish** The phone number will be saved to the customer record.



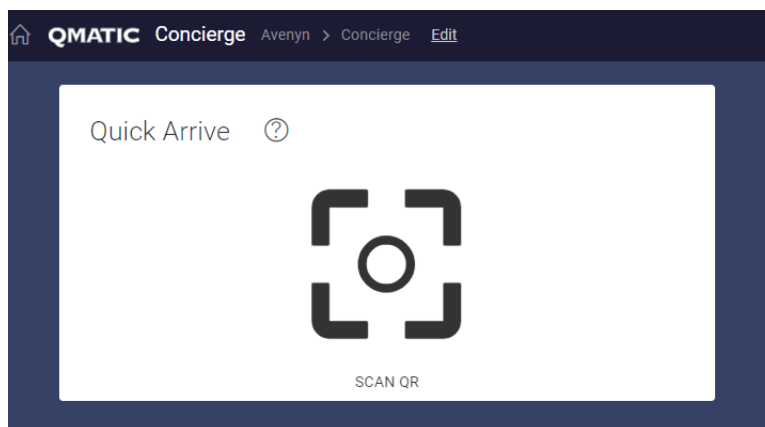
A screenshot of a web form titled "Add customer phone number to enable SMS". Below the title is a text input field labeled "Phone number" with a green "Required" label to its right. At the bottom of the form are two buttons: "Cancel" (outlined in red) and "Finish" (solid grey).

11.Dependent on the settings of your organization, you may get a warning that the customer checks in too late or too early. You then need to select if your want to check in the customer anyway, or if you want to cancel the check-in.

When the appointment is checked in, the visit is placed in a queue and gets a visit ID assigned to it.

3.9.1 Quick Arrive of appointments

Concierge may be configured so that the Quick Arrive feature is available from the landing page.



Click **Scan QR** and you will have the option to scan a QR code and arrive an appointment.

3.10 Creating a visit



To create a visit:

1. On the start screen, select **Create visit**.

In the Select service step, a list of services will be shown. To see a description of the service, click the info icon next to the service.

The screenshot shows the 'Create visit' workflow. At the top, there's a dark header with a 'Create visit' button (with a person icon), a 'Select service' button (highlighted in white), and 'Add customer' and 'Confirm' buttons. A 'Cancel' link is on the right. Below the header, the 'Select service' section includes a search bar labeled 'Search service' with a magnifying glass icon. To the right of the search bar is a checked checkbox labeled 'Enable multiservice' with a help icon. Below this is a section titled 'FREQUENT SERVICES' containing a list of services: 'Drivers license', 'Drivers Testing', 'Building & Planning', 'Driving & Transportation', and 'Education & Training'. Each service has an information icon (i) to its right. Below this list is a section titled 'ALL AVAILABLE SERVICES' which currently shows 'Building & Planning' with an information icon (i) to its right.

Select the wanted service(s) from the list or search for services in the search field. To be able to add more than one service, select the **Enable multiservice** check box.

Once you have selected a service, the list of services under All Available Services list will only contain the services that can be booked in combination with the first selected service.

When you have added all the wanted services (max. five), click **Done**.

- The Add customer step will now be opened. If you don't want to add a customer, click **Done**. You can choose to always skip this step by selecting the check box.

The screenshot shows a dark navigation bar at the top with four steps: 'Create visit' (with a person icon), 'Select service', 'Add customer' (highlighted in white with a red arrow), and 'Confirm'. A 'Cancel' link is on the far right. Below the navigation bar, the main content area is titled 'Select customer' and includes a 'Skip this step' checkbox with a help icon. Underneath is a section for 'LINK EXISTING CUSTOMER' with a search bar labeled 'Search customer' and a magnifying glass icon. A note below the search bar says 'Search customer by phone number, mail, first or last name'. Below this is a section for 'OR ADD NEW CUSTOMER' with input fields for 'First name' and 'Last name', both marked as 'required'. There are also fields for 'Email' and 'Phone number'. At the bottom left, there is a 'Date of birth' label. A large red 'DONE' button is positioned at the bottom right of the form area.

If you want to link an existing customer, enter the first name, last name, email or phone number of the customer in the search field.

ⓘ For phone numbers, a minimum of 5 characters must be entered before the search starts.

You can also create a new customer record here in the Add new customer section. Click **Save & Add** to add the created customer to the visit.

- In the Confirm step, you will see the details for the visit to the left. Depending on the configuration, you can change language, add marks, appointment time, notes and other custom information.

The screenshot shows the 'Create visit' form in the Concierge Manual. The form is divided into two main sections: 'Visit details' on the left and 'VIP' and 'Select notification method' on the right. The 'Visit details' section includes fields for Branch name, Service name, Language (Swedish - Svenska), Consultation type (selected), Add mark type 2, Add mark type 3, Add notes, and three info fields (Info 1, Info 2, Info 3). The 'VIP' section has three radio buttons for Level 1, Level 2, and Level 3. The 'Select notification method' section has two buttons: SMS and Ticketless.

You may also have the option to select a VIP level for the visit here. Select the wanted VIP level.

ⓘ VIP may be called something different in your system. It is a feature that can be used for segmentation of customers into different categories, and may be used for customers with special needs, etc.

4. Select a notification method. The option Ticketless creates a visit, without printing a ticket or sending an SMS.

ⓘ It's not possible to choose email as notification method when creating visits.

5. When done, click **Confirm**.

ⓘ If marks are mandatory, you will not be able to confirm visit creation without adding at least one mark. See "2.3.10 Using Marks" on page 11.

6. If you have selected SMS as notification method, and the customer doesn't have a phone number attached, you will be asked to add a phone number. Enter a phone number and click **Finish**. The phone number will be saved to the customer record.

Add customer phone number to
enable SMS

Phone number

Required

Cancel

Finish

A confirmation message containing the visit ID is displayed.

3.11 Accessibility features

To make Concierge accessible to people with disabilities, efforts have been made to make Concierge meet the standards of WCAG 2.1. This section presents some accessibility features that could need some extra attention.

3.11.1 Tabbing and shortcuts

- You can use the tab key  to move between different objects. Use **tab** to move to the next object and **shift+tab** to move to the previous object.
- Use the arrow keys to move between different list items within an object.
- In the header, there is a possibility to use a tabbing shortcut to get directly to the content. On the start page, just press the **Tab** key, and then **Enter** to go directly to that object.
 - First shortcut links to Quick Serve/Quick Create
 - Second shortcut links to Menu bar

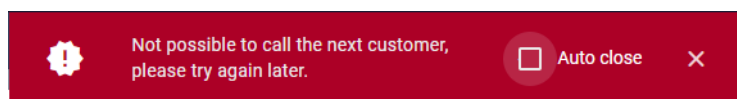
3.11.2 Navigating in the date picker

When creating an appointment, there is a date picker to select a date. You can use the keyboard to navigate in the date picker in the following ways:

- When the calendar is opened, focus is set on the current date.
- Press the left and right arrow key to navigate the row by week day.
- Press **Home** and **End** to jump to the beginning or end of the current row.
- Press the up and down arrow keys to navigate between weeks on the same week day.
- Press **PageDown** and **PageUp** to navigate backwards or forwards by month.
- Press **Alt+PageDown** and **Alt+PageUp** to navigate backwards or forwards by year.
- Press **Enter** to select the focused date.

3.11.3 Prevent pop-up messages from disappearing

In Concierge, there are several messages that appear as so called toasts. They can be either error messages (red) or success messages (green). To make sure everyone has time to read the toasts, they have an auto close functionality that can be turned on or off:



- Uncheck the auto close check box (default) to make the toast remain until you click the x to remove it. Maximum number of open toasts is 3.
- Check the auto close check box to make the toasts disappear automatically after 5 seconds.

The auto close setting is saved in a browser cookie.

3.12 FAQ Concierge

How can I add several services to an appointment or visit?

First of all, the system configuration must allow multiservice. This is done in Business Configuration > Equipment Profile > Multi Service Support. Only a user with system administration rights can do this.

Then, when selecting services, the **Enable multiservice** check box must be checked.

ⓘ Note that which services that can be booked in combination for appointments is determined in the Appointment Profiles. Only a user with calendar admin rights can configure this.

How can I edit the service(s) when arriving an appointment?

In the Arrive appointment flow, you have the option to go to the Edit service step before confirming the arrival.

How can I create an appointment in another branch?

When clicking **Create Appointment**, the Select branch step is bypassed by default. In the Select service step you can choose to go back to the Select branch step and select another branch. However, this must be allowed in the system configuration. This is done in Business Configuration > Equipment Profile > Multi Branch Support. Only a user with system administration rights can do this.

If you always want the Select Branch step to be expanded when creating an appointment, deselect the **Skip this step** check box.

How can I update the customer information?

When creating an appointment or a visit, you have the option to edit the customer

record in the Add customer step. Click **Edit**  to open the Edit selected customer window. Click **Save & Add** to save the customer record. If you don't want to proceed in creating an appointment or a visit, click **Cancel**. The changes in the customer record will still be saved.

Q-MATIC

Q-MATIC AB,
Box 198,
SE-431 23 Mölndal,
Sweden.

VAT No SE556212749701

Phone: +46 31 756 46 00

Email: info@qmatic.com

Web: www.qmatic.com