

QMATIC

User Guide

Orchestra 7.4

213.01B

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Contents

1. What's New	v
2. Introduction.....	1
Welcome!	2
Key components of Orchestra	2
Accessibility	2
3. Getting Started.....	3
Introduction	4
Customer Journey Management Terminology.....	4
Opening Qmatic Orchestra	6
Login	6
Selecting application	8
Profile settings	9
4. Counter.....	11
Introduction	12
Getting started with Counter	12
View queue information	14
Call a customer	16
Working with the called visit - the visit card	20
Finishing the transaction	34
Accessibility features	35
5. Calendar	37
Introduction	38
Getting started with Calendar	38
Book an appointment	40
Block a resource	43
Appointment Reception.....	44
6. Concierge	47
Introduction	48
Getting started with Concierge.....	49
Log in	51
Start page	52

Top bar..... 52

View queue information and edit visits..... 54

Quick serve 60

Creating an appointment..... 61

Rescheduling or canceling an appointment 67

Arriving an appointment 69

Creating a visit 73

Accessibility features 77

FAQ Concierge 79

1. What's New

This section describes what is new in this manual since the latest original release of a Qmatic Orchestra upgrade.

Version	Chapter	Change
01.A		
01.B	Reception	Remove the chapter about Reception

2. Introduction

Topics in this chapter

Welcome!	2
Key components of Orchestra	2

Welcome!

Welcome to Qmatic Orchestra, a collection of high quality tools designed to provide you with an optimized Customer Journey Management solution.

Orchestra is an extremely flexible application built upon an integrated Internet architecture. This User's Guide covers the features and functionality of a basic system not adapted for any specific customer or market segment. Your system may differ in setup and/or options from those presented within this guide. If you have any questions, please contact your Qmatic Representative.

Key components of Orchestra

Key components of Orchestra include:

- Modular Customer Journey Management system
- Connectivity through standardized connectors (web services) using standard common known technology
- Usability improved workstations are included (counter and reception)
- Easy access to all valuable Customer Journey Management information
- Clients are zero footprint installation, only a web browser is required
- Centralized user management – Manage all user access, authentication and privileges across a multi-branch network from a central administration point.
- Central data management – All transaction data from across the entire branch network is stored within a central database.
- Central branch configuration – Set up the branch configuration and hierarchy from a central location.

Accessibility

Our staff applications should be accessible for everyone, including people with disabilities using screen readers, zoom and keyboard only. Currently, work has been done for Concierge and Counter to meet WCAG 2.1 (Web Content Accessibility Guidelines). The applications should follow standard accessibility behavior and can be used without any prior knowledge. Please see the user guide for each application to learn more about special accessibility features:

- Counter: "Accessibility" on page 2
- Concierge: "Accessibility features" on page 77

3. Getting Started

Topics in this chapter

Introduction	4
Customer Journey Management Terminology	4
Opening Qmatic Orchestra	6
Login	6
Selecting application	9
Profile settings	10

Introduction

Qmatic Orchestra and the Orchestra database are installed as one central installation at the head office. The branches are installed with hardware such as ticket printers and displays.

The journey of a visit

The point where a customer enters the system and is assigned to a queue is called an entry point. This can be a manned reception, or a kiosk. It can also be done through a mobile entry point.

The customer is then assigned a visit number. This can be communicated to the customer through a physical ticket, a virtual ticket or SMS. It is also possible to just show the visit number on the kiosk display and the customer has to remember it or write it down.

The customer is guided through the customer journey by presentation points, that present information about where to go next. These presentation points may be in the form of displays, voice units and so on.

The customer is then served at a service point, such as a counter. Different counters may have different properties making them capable of serving certain services. For example, some counters at a bank may handle cash services, while others do not.

The call and serve procedures, described below, include issuing tickets to a customer, calling the customer for service, working with the visit, and completing the transaction.

Customer Journey Management Terminology

Below you can find a description of the most common terms used in this manual.

Table 1: Customer Journey Management Terminology

Term	Description
Appointment	An agreed intention to a visit.
Branch	An office or department carrying out one or more services in a geographical location.
Calling rule	A set of rules that decide from which queue the next customer should be called.
Customer	A customer is a person visiting a branch.

Table 1: Customer Journey Management Terminology

Customer Journey Management	The setup of services, and queues, calling rules and segmentation rules.
Delivered service	A kind of mark about what service that the customer got.
Display	Generic display that can change view, e.g. LED or monitor display.
Drop-in visit	A visit that has not been booked. The opposite of an appointment visit. Also called walk-in visit.
Entry point	The point in the system where the visit starts and the customer is assigned to a queue. Can be a kiosk (ticket printer), a reception etc.
Information display	A LED or a graphical display that shows system information.
Mark	A user-defined value that can be added to a service transaction. See Outcome and Delivered service.
Main display	A LED or a graphical display in the waiting area that shows the Ticket Id that is called, the service point that is calling and the position of the service point.
Outcome	A mark object that can be added to a service or a delivered service to specify the result of the transaction.
Positional display	Display above a service point.
Presentation point	A unit that can display information, for example main displays and positional displays.
Queue	A grouping of customers from where they are called to be served.
Service	A service is what our client delivers. A task performed by the company for the customer.

Table 1: Customer Journey Management Terminology

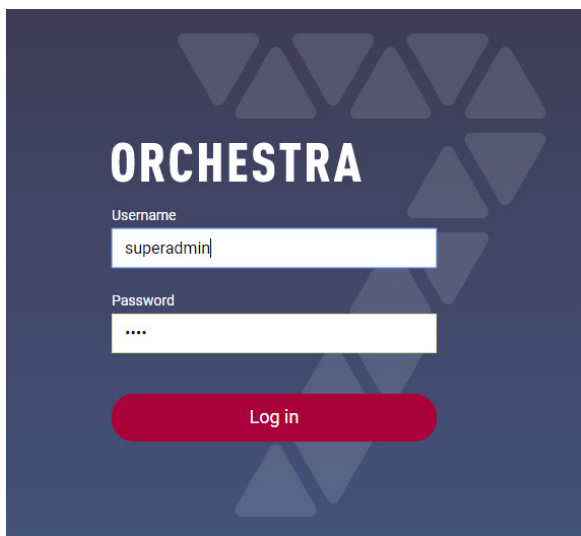
Service point	A unit or terminal (software, hardware or application) where the staff member is handling the requested service for the customer during the visit. Can be Counter (a web application), a KT (a hardware terminal) or Connect (a mobile application).
Ticket	Most commonly a physical note with a queue number. May also be virtual, if Mobile Ticket is used.
Visit Id	The unique reference number for the visit.
Visit	The part of the customer journey that starts when the customer takes a ticket and is assigned to a queue, and ends when the last transaction is ended. Appointments turn into visits upon arrival.
Work profile	A work profile calls customers from a specified number of queues with some kind of priority.

Opening Qmatic Orchestra

Open Qmatic Orchestra by selecting the bookmark for it in your web browser. The web address to Qmatic Orchestra should be sent to all users by the administrator.

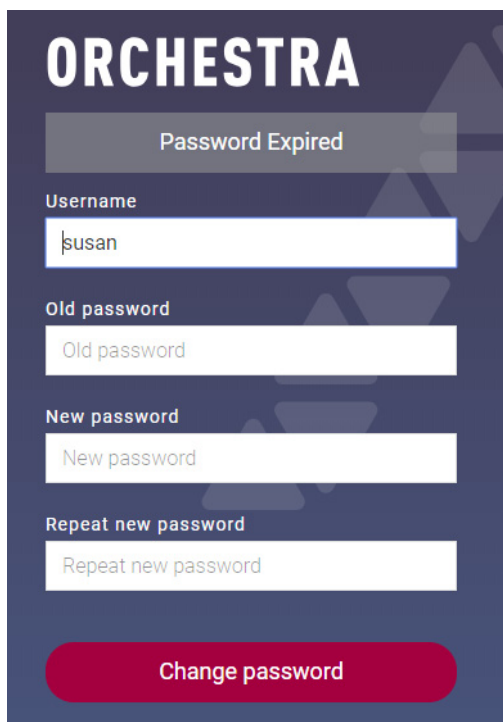
Login

Qmatic Orchestra requires a user login and password to gain access. The username is always case insensitive and the password is always case sensitive.

The image shows a login interface for a system named "ORCHESTRA". The background is a dark blue-grey color with a pattern of lighter blue-grey triangles. The word "ORCHESTRA" is displayed in large, white, bold, sans-serif capital letters. Below the title, there are two input fields. The first is labeled "Username" in a small, light grey font, and it contains the text "superadmin". The second is labeled "Password" in a small, light grey font, and it contains four dots. Below these fields is a red, rounded rectangular button with the text "Log in" in white, sans-serif font.

Enter a *Username* and *Password* and then click the *Log in* button.

Depending on how the system is configured, new users may be prompted to change their passwords on the first log in, or after the password has been changed by an administrator:

The image shows a web form titled "ORCHESTRA" with a "Password Expired" message. It contains four input fields: "Username" (with "susan" entered), "Old password", "New password", and "Repeat new password". A red "Change password" button is at the bottom.

ORCHESTRA

Password Expired

Username
susan

Old password
Old password

New password
New password

Repeat new password
Repeat new password

Change password

Type *Old password*, *New password*, and *Repeat new password*, then click *Change password*.

If you want to change your password without being prompted about it, enter the following url, in your browser:

`<Orchestra ip or domain name>:<Orchestra port>/changePassword.jsp`

Selecting application

Depending on system settings, there can be a user group that makes the users of that group having to select an application after log in. In that case, the first page of the system is the home page where the selection of application is done.

Here is an example of what the home page may look like:



In this way, a user can easily activate the appropriate features of the system for the work at hand.

The Orchestra home page can always be reached by clicking the **Home** icon,



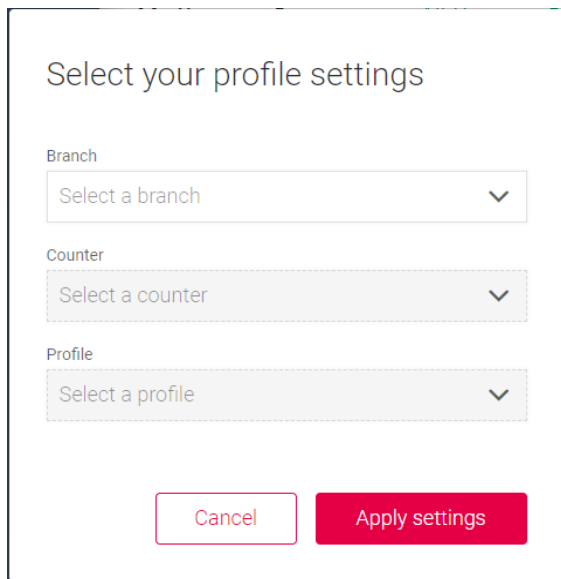
, or the Qmatic logotype.

The features available to the user depend on the assigned user roles. A Counter user has access to the counter features and may or may not have access to other features. A Reception user has access to the Reception features and may or may not have access to other features.

Profile settings

Once logged in, and depending on the role, a user must select a branch, a counter and a profile to work with before he or she can call the first customer.

This is the settings window for the Counter user:



The screenshot shows a dialog box titled "Select your profile settings". It contains three dropdown menus: "Branch" with the placeholder "Select a branch", "Counter" with the placeholder "Select a counter", and "Profile" with the placeholder "Select a profile". Each dropdown has a downward arrow icon. At the bottom of the dialog are two buttons: a white "Cancel" button and a red "Apply settings" button.

When the user works in one branch only, no branch choice is given in the window, likewise when the user has access to only one counter and/or one profile.

Select the wanted alternatives from the lists and click **Apply settings**.

If the selected counter is already in use, you will be notified about that:

The counter is in use!

If you login, the current user
(superadmin) will be logged out. Are
you sure?

Yes LoginNo, change counter

⚠ Note that your system *may* be configured in a way that makes it possible for two users to use the same counter. If you are not sure, please check this with your System Administrator.

This is the settings window for the *Reception User Role*:

Select your settings

Branch

Select Branch

Entry Point

Select Entry point

Apply settings

Cancel

When the Receptionist works in one branch only, no branch choice is given in the window, likewise when the Receptionist has access to only one Entry Point.

Timeout

In the Reception, if you have been inactive for 30 minutes (with a 1 minute grace period where you will, via a popup window, get the chance to cancel the timeout and keep working), you will be logged out.

5. Counter

Topics in this chapter

Introduction	12
Getting started with Counter	12
View queue information	14
Call a customer	16
Working with the called visit - the visit card	20
Finishing the transaction	34
Accessibility features	35

Introduction

This guide presents the standard procedures and features in the Counter application.

Counter is an easy-to-use browser application for calling customers. With Counter, you can do the following:

- ✓ Call visits
- ✓ Remove visits
- ✓ Create and remove customers
- ✓ Edit customers
- ✓ Cherry-pick visits to serve
- ✓ Transfer visits
- ✓ Walk direct

ⓘ Your system and user role configurations may differ from those presented in this user's guide.

Getting started with Counter

1. Go to `http:<orchestra-ip>:<port>` or click the Orchestra bookmark in your web browser
2. Click the **Counter** icon on the Orchestra home page.



A settings window is displayed:

Select your profile settings

Branch

Select a branch

Counter

Select a counter

Profile

Select a profile

Cancel

Apply settings

Select branch, counter and profile, and click **Apply settings**.

⚠ It is strongly recommended that the same user should *not* be logged in to the same counter from two different browsers, at the same time.

The landing page will be displayed:

QMATiC Counter

Hospital > ReadServicePoint > Hospital all Edit

Super Administrator

Click

"Call next" or "Walk in" to start serving

Walk in

Call next

Close counter

My pool

No customers waiting

Counter pool

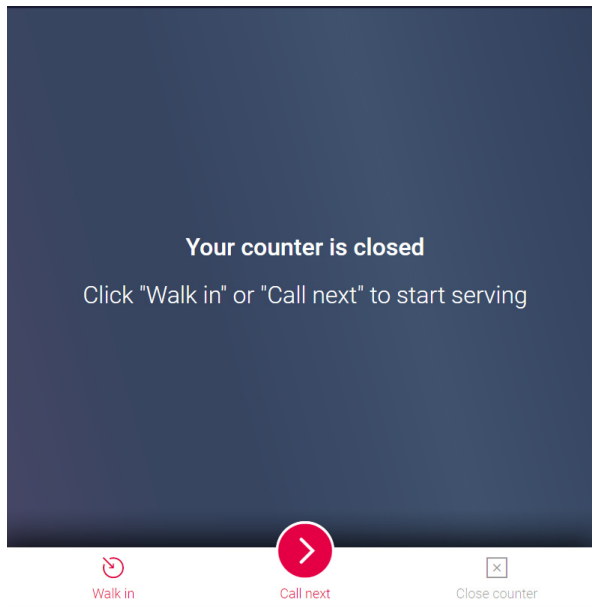
No customers waiting

My Queues

17

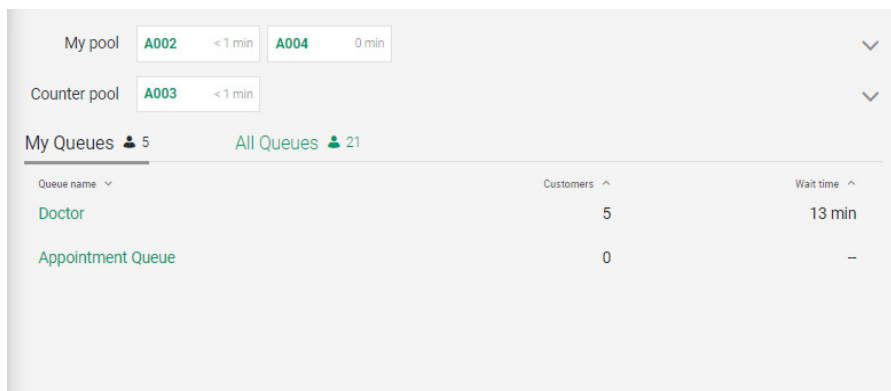
Queue name	Customers	Wait time
Hospital Queue	20	5 min
Pharmacy	14	4 min
X-ray	3	3 min
Appointment Queue	0	--
Appointment Queue 2	0	--
VIP Queue	0	--

If the counter is closed, you will see this window:



! Your counter terminal may look different, depending on how your system is configured.

View queue information



In the right area of the Counter start page, you can monitor the queue information. Depending on how your system is configured, you can toggle between My Queues and All Queues.

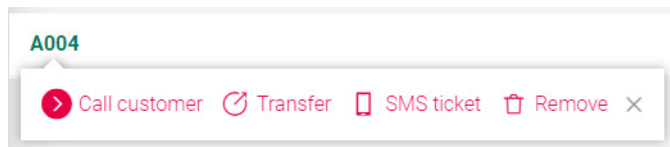
At the top, you can find the visits that have been transferred to your staff pool as well as the counter pool.

Click the sorting buttons to sort the list according to Queue name, customers, or Wait time.

ⓘ Note that the waiting time displayed here comes from the first visit in the queue and not the maximum wait time of all visits in the queue.

Click on a queue to expand it and see all the visits in the queue. You will also see

if there is a note attached to the visit. Hover over the note icon  to see the note. By clicking on a specific visit, it is possible to do the following:



- Call the visit, by clicking **Call customer**.
- Transfer the visit, by clicking **Transfer**. See also “Transferring a visit” on page 30
- Send a link to a virtual ticket by clicking **SMS ticket**. See also “Send SMS for ongoing visit” on page 33.
- Remove a visit, by clicking **Remove**.

Call a customer

There are three ways to call a customer for service:

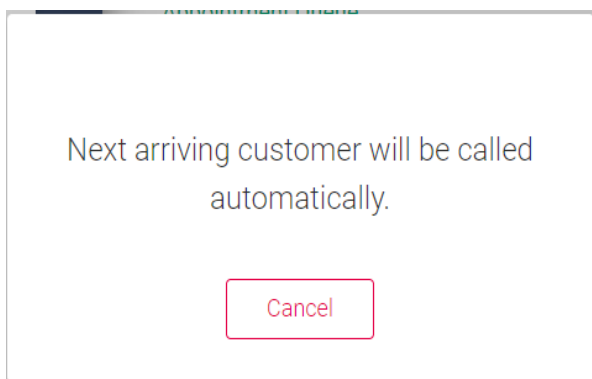
- Click **Call next** . This calls the next customer according to the work profile. See “Call the next visit” on page 16
- Click **Walk in** . This calls a customer that has not taken a ticket. See “Calling a customer without a ticket - Walk direct” on page 17.
- Call a customer out of queue order. This can be done either by clicking on a queue and select a ticket number to call, or you can select a ticket number from your pool to call. See “Calling a customer out of queue order” on page 18.

Call the next visit

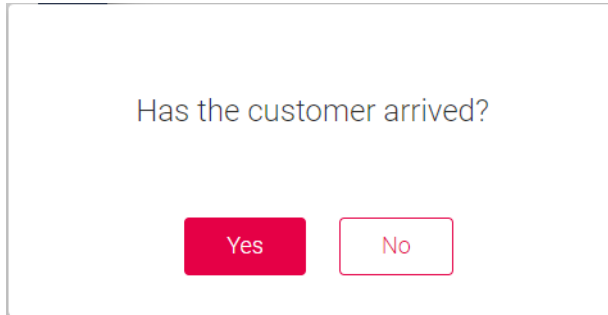
Click **Call next** to call the next waiting visit according to your work profile. This also closes the ongoing visit.

If you have **Store next** enabled, this means that the next customer in line, according to your work profile, will be called automatically.

If there is no one waiting to be served at the moment, with Store next enabled, you will see the following message:



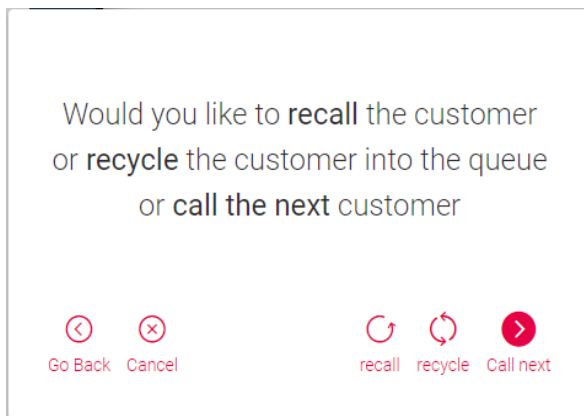
If there are waiting customers in your queue and if your service point has been set up as **Confirm needed** in the Business Configuration of your branch (see the Administrator's Guide for more information), the following message will appear:



Has the customer arrived?

Yes No

If you click **Yes**, you can proceed with working with the transaction. Should you instead click **No**, the following message will appear, giving you the choice to recall, recycle, or call the next customer. Clicking **Cancel** here would imply that the customer did not show up. If you click **Go Back**, you will be asked again whether or not the customer has arrived:



Would you like to **recall** the customer
or **recycle** the customer into the queue
or **call the next** customer

Go Back Cancel recall recycle Call next

To see the options you have once a customer is called, please see “Working with the called visit - the visit card” on page 20.

Calling a customer without a ticket - Walk direct

A typical scenario to use the Walk direct feature is when no one is waiting in line and a customer approaches a counter without first taking a ticket.

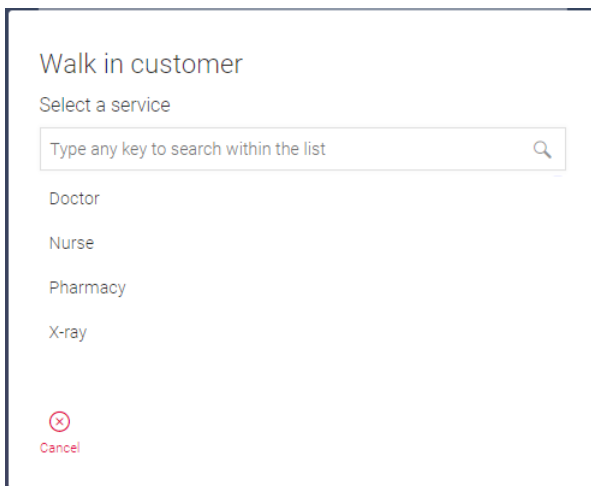
A customer without a ticket can be registered Walk direct feature. The Walk in feature lets you place a virtual ticket into the service queue of your choice.

The ticket is called immediately following the selection of the service.

To call a customer without a ticket:

1. Click the **Walk direct** icon .

The list of available services is displayed and it is also possible to search for a service:



-  If your system is configured so that a default Walk in service is set, this page is bypassed and a visit with the default service will automatically be started instead.
2. Select a service. The visit is tied to this service allowing the system to record the transaction. The visit is called and the counter page is displayed.
-  This visit is only created within the system, no ticket will be printed
3. Handle this visit in the same way as you would with any other visit.

For more information, see “Working with the called visit - the visit card” on page 20.

Calling a customer out of queue order

In certain situations, you may want to call customers, even if it is not their turn. This can be done regardless of how your work profile is set up.

It is done in the following way:

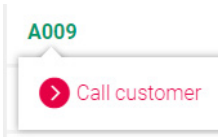
1. In the queue area, expand the wanted queue.

You will see all the visits in the queue:

< DOCTOR  5

Ticket ▾	Customer name	Service name	Wait time
A007		Doctor	2 min
A008		Doctor	2 min
A009		Doctor	2 min
A010		Doctor	2 min
A011		Doctor	2 min

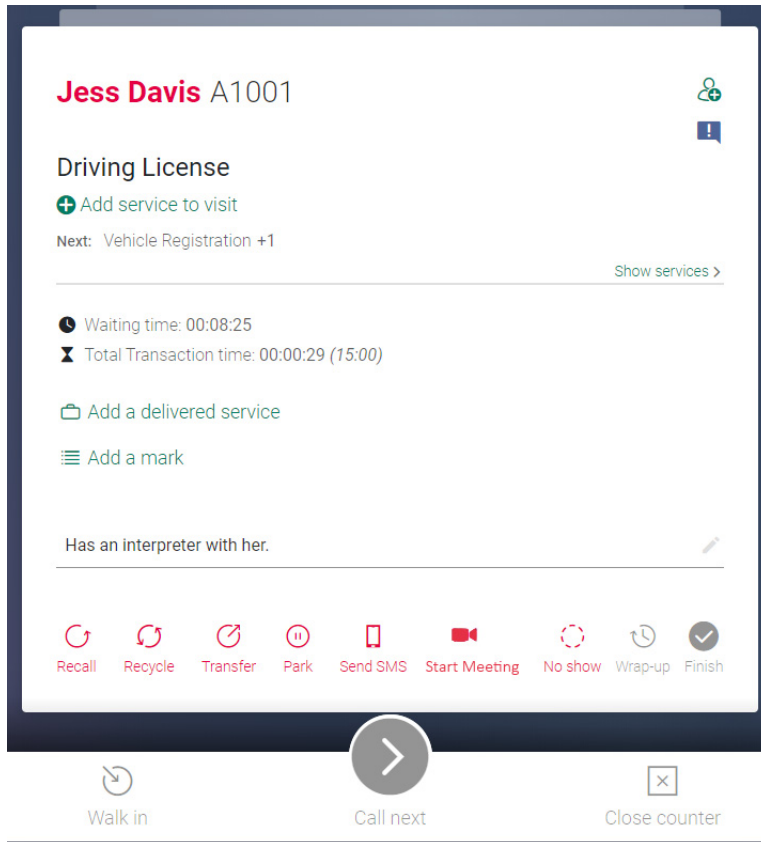
2. Click the visit number that you want to call, select the *Call customer* action:



Handle the visit as you would handle any other visit, see “Working with the called visit - the visit card” on page 20.

You can also pick a ticket from your pool to call. For more information about pools, see “Pools” on page 33.

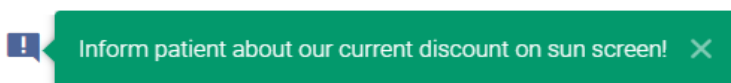
Working with the called visit - the visit card



The visit card contains the following information:

- **Customer name** – and a plus sign if several customers are linked to the visit.
- **Visit number** – for example A001.
- **Service name** – the name of the service that this visit applies to.
- **Context Marketing** – if the Context Marketing icon  is shown, this means that there is an available Context Marketing message.

An example of a Context Marketing message is:



- **Waiting time** – the time the customer has waited, before he/she was called.
- **Service transaction time**: the transaction time for the current service. This is only displayed if you select a service to serve from the visit card.
- **Total transaction time** – the total time since the transaction started. Here, your system may also be configured to show the expected transaction time in parenthesis.
- **Notes** – the notes for the visit, if available. You can also add notes here. See “Adding and editing notes for an ongoing visit” on page 23.

In the visit card, you can do the following things:

- Click **Add customer**  to add a customer or edit the customer information. See “Adding a customer and edit customer information” on page 23.
- Click **Add service to visit**  to add another service or turn the visit into a multi-service visit. It is also possible to delete services here. See “Adding/editing services” on page 26. Only the *Next* service will be shown, but if several are added, it is possible to expand the list of services to see them all.
- Click **Show services** to show additional services connected to the visit. It is also possible to select a service to serve here. For more information, see “Show services and select a service to serve” on page 27.
- Click **Add delivered service**  to add a delivered service. For more information, see “Adding a delivered service” on page 27.
- Click **Add marks**  to add marks. For more information, see “Adding marks” on page 29.
- Click **Add outcome**  to add an outcome. For more information, see “Adding outcomes” on page 29.
- Click the **notes area** to add or edit notes.
- Click **Recall**  to call the visit again, see “Recalling a visit” on page 30.
- Click **Recycle**  to recycle the visit, see “Recycling a visit” on page 30.
- Click **Transfer**  to transfer the visit, see “Transferring a visit” on page 30.
- Click **Park**  to park the visit, see “Parking an ongoing visit” on page 33.
- Click **Send SMS**  to send an SMS with a link to a virtual ticket.

- Click **Start Meeting** to start/join Microsoft Teams meeting.
- Click **No show**  to set the visit as No show, see “Setting a visit as No show” on page 33.
- Click **Wrap-up**  to wrap up the visit, see “Wrapping up the visit” on page 34.
- Click **Finish**  to finish the visit, see “The Finish button” on page 34

Adding and editing notes for an ongoing visit

Notes may already have been added when the visit was created. If so, they will be visible on the visit card. To edit or add more notes, click the **Notes** icon. The maximum number of characters for a note is 255. Notes are automatically saved.

Notes are only valid for as long as the visit is open. All notes are deleted when the visit is closed.

Adding a customer and edit customer information

By linking a customer name to a visit after the visit has been called, the coming transactions, if any, will see the name of the customer with that visit number.

Link an existing customer

1. In the visit card, click the **Add customer** icon, .
2. In the Link existing customer field, start entering a name in the Search field. The search begins when two characters have been entered. The search feature is not case sensitive, nor does it require a complete entry to successfully run a search.
3. A customer list is displayed; up to a maximum of 100 names.
4. Click the customer name to select the customer.
5. Click **Save & Add** to link the customer to the visit.

To change an erroneously linked name, simply link another name.

Add new customer

1. Click the **Add customer** icon, , on the visit card.

< Add customer

LINK EXISTING CUSTOMER

Search by name, email or phone number

OR ADD NEW CUSTOMER

First name
required

Last name
required

Email address

Phone number

Date of birth

Month
Day (DD)
Year (YYYY)

Month
DD
YYYY

Cancel
Save & Add

2. Fill in the customer details:

- First name - required
- Last name - required
- Email address
- Phone number
- Date of birth

3. Click **Save & Add** to add the customer to the visit.

Edit customer information

1. Click the name of the customer, on the visit card, next to the visit number.

The Edit customer window will be displayed:

< Edit customer

First name

required

Pernilla

Last name

required

Johansson

Email address

pernilla@gmail.com

Phone number

727340618

Date of birth

Month

February

Day (DD)

18

Year (YYYY)

1987

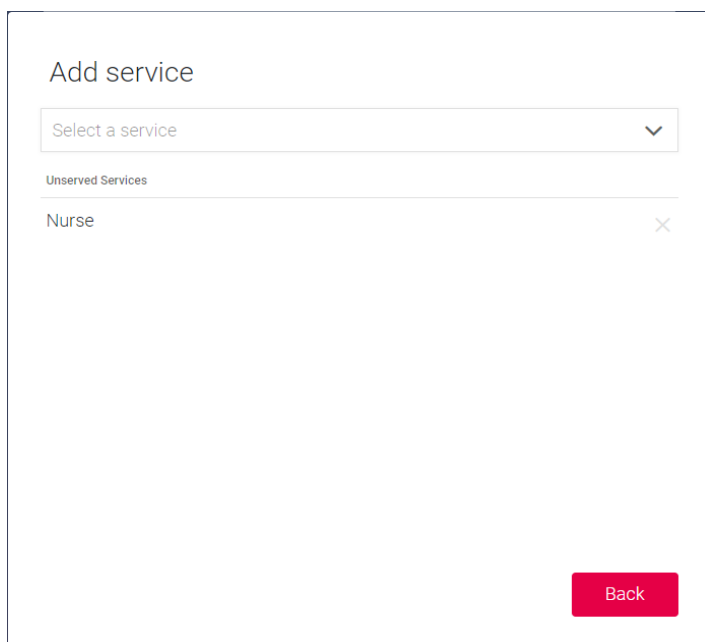
Cancel

Update info

2. Edit the customer details. When done, click **Update info**.

Adding/editing services

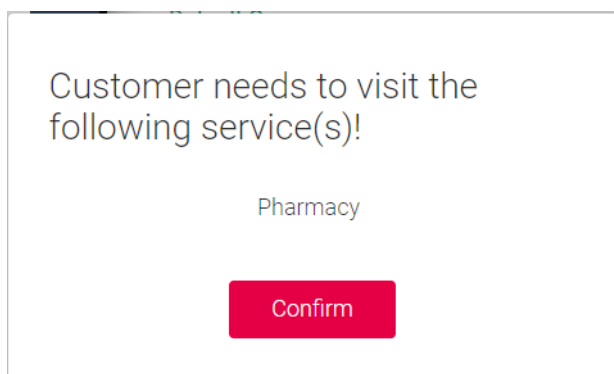
Depending on how your system is set up, it may be possible to add services to an ongoing visit, turning it into a multi-service visit. This is done by clicking on the **Add service** icon, , on the visit card. The Add service window is displayed:



The 'Add service' window is a light gray box with a dark gray border. At the top, the title 'Add service' is displayed in a dark gray font. Below the title is a white input field with the placeholder text 'Select a service' and a downward-pointing chevron icon on the right. Underneath the input field, the text 'Unserviced Services' is shown in a smaller, lighter gray font, followed by a horizontal line. Below the line, the word 'Nurse' is listed in a dark gray font, with a small 'x' icon to its right for deletion. At the bottom right of the window is a red button with the text 'Back' in white.

Here, you can select a service from the drop-down list. Unserviced services will be listed and it is also possible to delete them from the list.

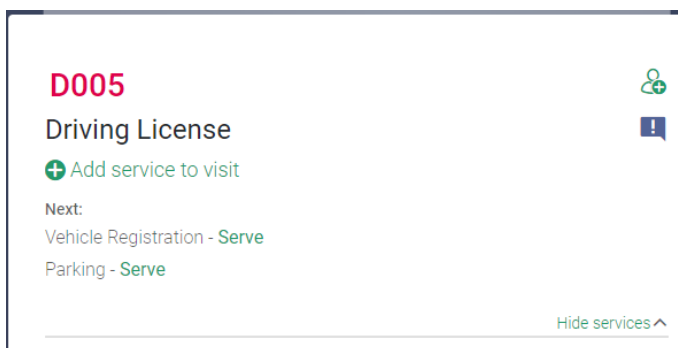
When a multi-service transaction is finished, you will be asked to confirm that the customer has more services to visit:



The confirmation window is a light gray box with a dark gray border. It contains the text 'Customer needs to visit the following service(s)!'. Below this text, the word 'Pharmacy' is displayed in a dark gray font. At the bottom center of the window is a red button with the text 'Confirm' in white.

Show services and select a service to serve

By clicking the **Show services** button, you can see which services are connected to the visit:



Click **Serve** to select a service to serve. This action will end the current service which means that if a delivered service/outcome is required, you have to add that first. A message confirming which service you are currently serving will be displayed.

Adding a delivered service

⚠ If a delivered service has been connected to this service, it *must* be added, before it is possible to end the transaction.

Note that you can only add a delivered service when a ticket has been called.

1. Click the **Add delivered service** icon, . The Add delivered services window is displayed:

Add delivered services

Select a delivered service

Name	Outcome	Time	
Referral to other hospital		15:52	×
Examination		15:52	×

Back

Here, you can search for a delivered service to add. If there is an outcome connected to the delivered service, you can select that here too.

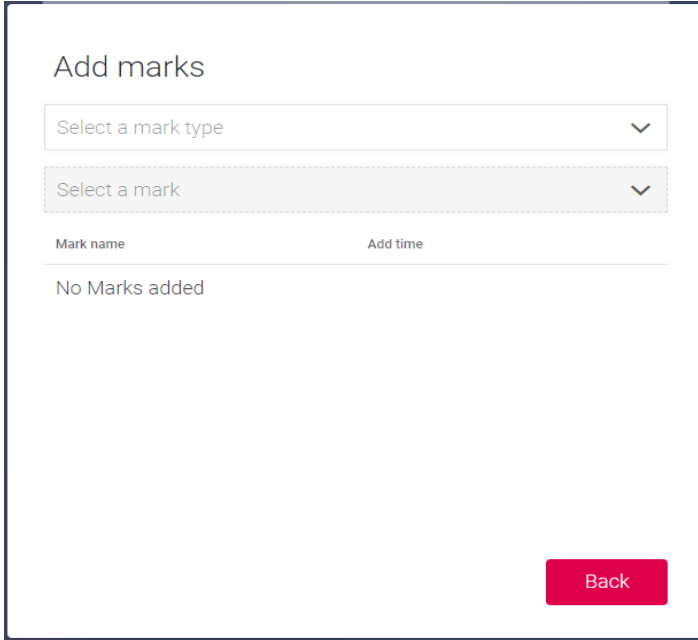
The time that the delivered service was added will be shown in the Time column.

It is also possible to delete delivered services.

Adding marks

Depending on how your system is set up, it may be possible, or even mandatory, for you to add marks to the ongoing visit. This is done by clicking the **Add marks**

icon . The following window is displayed:



The screenshot shows a window titled "Add marks". It contains two dropdown menus: "Select a mark type" and "Select a mark". Below these is a table with two columns: "Mark name" and "Add time". The table is currently empty, showing "No Marks added". At the bottom right of the window is a red "Back" button.

Select the wanted mark type, select a mark, and enter the number of marks to add (max 10). Then click **Add mark to visit**.

The entered marks will be listed in the Add marks window. It is possible to remove marks, see the name of it, as well as what time it was added.

Adding outcomes

⚠ If an outcome has been connected to this service, it *must* be added, before it is possible to end the transaction.

Note that you can only add an outcome when a ticket has been called. In most cases you also have to add a delivered service.

- On the visit card, click the **Add outcome** icon, , if this is an outcome connected directly to the service. If not, follow the procedure described in "Adding a delivered service" on page 27.
- Select an outcome from the drop-down list:



4. The wanted outcome is attached to the ongoing visit.

5. Add additional outcomes as needed.

Recalling a visit



If a customer does not respond to the initial call for service, the Recall feature allows you to call that visit a second time or more. Click the **Recall** icon to re-announce the most current visit on the displays and through the audio and/or video units available in your system. This option only operates for the most recent transaction and for a visit that has not yet been closed.

ⓘ The transaction time is *not* reset to zero when a visit is recalled.

Recycling a visit



If a customer does not respond to the initial call for service, or for any other reason you want the customer to be called again later, the **Recycle** icon allows you to put that visit back into the queue at the first position. The visit can, however, not be called until a certain time has passed. Default delay time is 60 seconds, but it can be changed in system settings.

ⓘ It is only possible to recycle a visit a certain number of times (default three times).

Transferring a visit



Use the Transfer feature to transfer a visit between queues, staff members or counters.

When transferring to a staff member or a counter, the visit will end up in their pool. For more information about pools, see “Pools” on page 33.

This feature is useful when multiple employees need to serve the same customer, or when a customer for example needs to fill in a form before being served again.

ⓘ It is also possible to transfer a visit without calling it first, by expanding a queue, selecting the wanted visit and then clicking on the **Transfer** icon.

1. Click the **Transfer** icon in the visit card, or click on the visit in the queue view. Decide if you want to transfer to a queue, a staff member, or a counter pool:

< Transfer visit

Where would you like to transfer the visit?

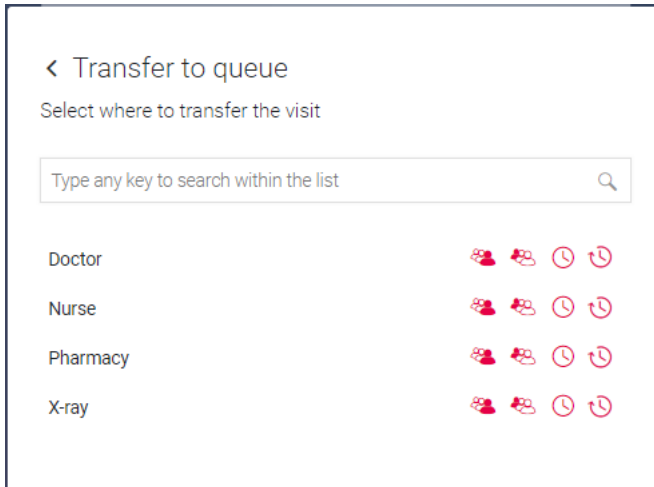
 Transfer to queue

 Transfer to staff member

 Transfer to counter pool


Cancel

2. Select a queue, counter or staff member to transfer the visit to. For queues, select if you want to transfer the visit first in line, last in line, based on visit lifetime or with a delay.



< Transfer to queue

Select where to transfer the visit

Type any key to search within the list

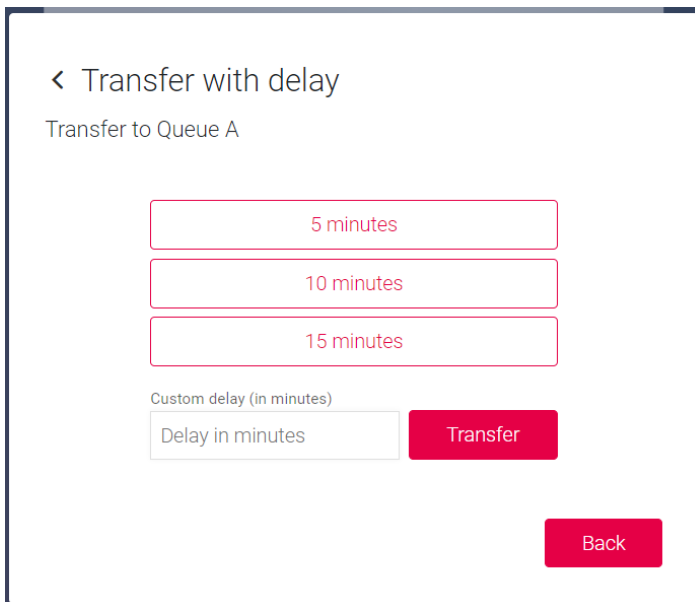
Doctor

Nurse

Pharmacy

X-ray

If you press Transfer with delay, you can either select one of the default options presented, or enter any number of minutes in the input field:



< Transfer with delay

Transfer to Queue A

5 minutes

10 minutes

15 minutes

Custom delay (in minutes)

Delay in minutes

Transfer

Back

Pools

Pools are similar to queues, but are used when customers need to be put on hold or parked aside the predefined customer journey. You may need to let a customer for example fill in a form and meanwhile continue serving the next customer.

There is one counter pool connected to each counter.

Visits can not be created directly in a certain pool, instead the customer must be transferred to the staff pool or counter pool.

The customer can later be called automatically from a pool and customers in a pool that does not have a certain order.

Pools may be connected to a certain work profile.

Parking an ongoing visit



If you click the **Park** icon, during an ongoing visit, the current visit will be sent to your staff pool.

Send SMS for ongoing visit



Sometimes, the customer may want to follow their visit online and thereby be able to wait elsewhere. There are two places where you can send an SMS:

- For a visit that has not been called yet, locate the visit in the queue view, click on it, and then select the option **SMS ticket**.
- For a called visit, you can select the option **Send SMS** in the visit card.

.Enter the customer's phone number and click **Send**. The customer will receive an SMS with a link to their virtual ticket (in Mobile Ticket application) where they can see their position in the queue etc.

Setting a visit as No show



If a customer is called for service and does not show up, you can recall the visit by clicking the button for it, see "Recalling a visit" on page 30. If still no customer appears, you can record the visit as a no show. The system then records no shows in the statistics, allowing management to track missed visits with the completed transactions.

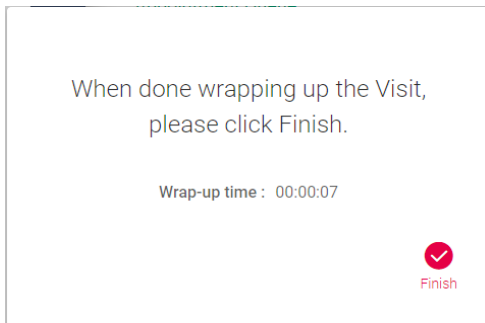
To record a visit as a no show, simply click the **No show** icon. The visit is saved in the statistics and closed.

Wrapping up the visit



Depending on how your system is set up, you may have the option to wrap-up the visit. This may be useful for example if you need to finish some paper work, after the customer has left and before the next customer is called.

Click the *Wrap-up* button. The following window will be displayed:



There is a timer showing how much time has been spent on the wrap-up. When done, click **Finish**.

Finishing the transaction

A transaction is finished by:

- Clicking the **Call next** icon
- Clicking the **Finish** icon
- Clicking the **Close counter** icon
- Transferring the visit to another queue or pool for additional service.
- Parking the visit, thus transferring it to your staff pool.

When it is mandatory to assign an outcome or delivered service to a visit, it is not possible to complete a transaction unless a an outcome and/or delivered service is assigned.

The Finish button



The **Finish** icon ends the transaction of the customer that you are currently serving but keeps the counter open.

Closing the counter



The **Close counter** feature ends the transaction of the customer that you are currently serving and closes your counter session.

Accessibility features

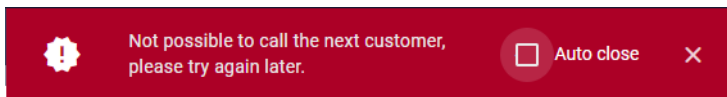
To make Counter accessible to people with disabilities, efforts have been made to make Counter meet the standards of WCAG 2.1. This section presents some accessibility features that could need some extra attention.

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 short-cut to get directly to the content. On the start page, just press **tab**, and then **enter** to go directly to that object.
 - a) First short-cut links to **Visit card**
 - b) Second short-cut links to **Action panel**

Prevent pop-up messages from disappearing

In Counter, 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.

6. Calendar

Topics in this chapter

Introduction	38
Getting started with Calendar	38
Book an appointment	40
Block a resource	43
Appointment Reception	44

Introduction

This guide presents the standard procedures and features in the Calendar application.

With the Calendar application, you can manage your appointments and get an overview of what appointments are booked and which time slots are available.

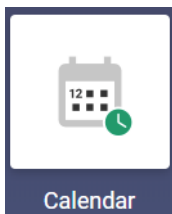
Calendar has the following features:

- ✓ Create appointments
- ✓ Edit and remove appointments
- ✓ Arrive appointments
- ✓ Create customers
- ✓ Edit customers
- ✓ View available resources

Your system and user role configurations may differ from those presented in this User's Guide.

Getting started with Calendar

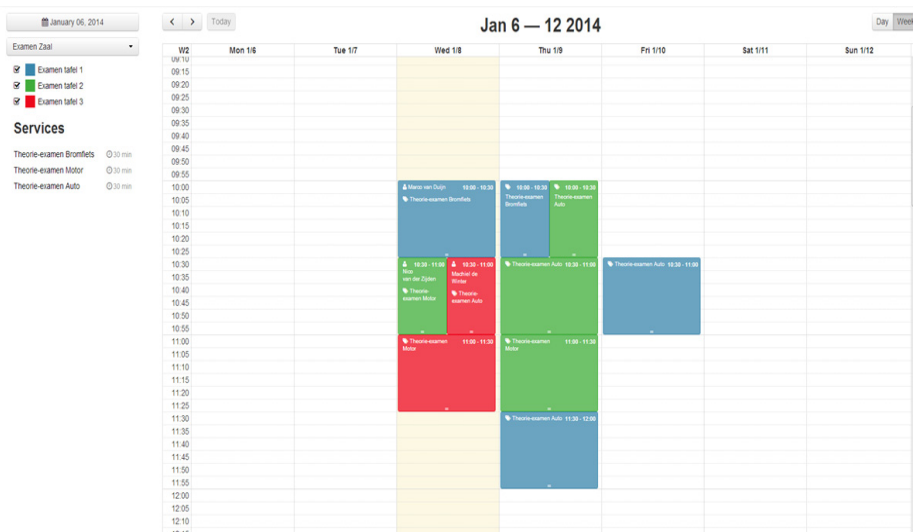
To manage your appointments, open the *Calendar* application from the *Home* page in Orchestra.



The calendar view shows, in a *Day* or *Week* view, planned appointments for a selected Resource, Resource Group and Service for a certain branch. This gives the user an overview of what is planned and still available.

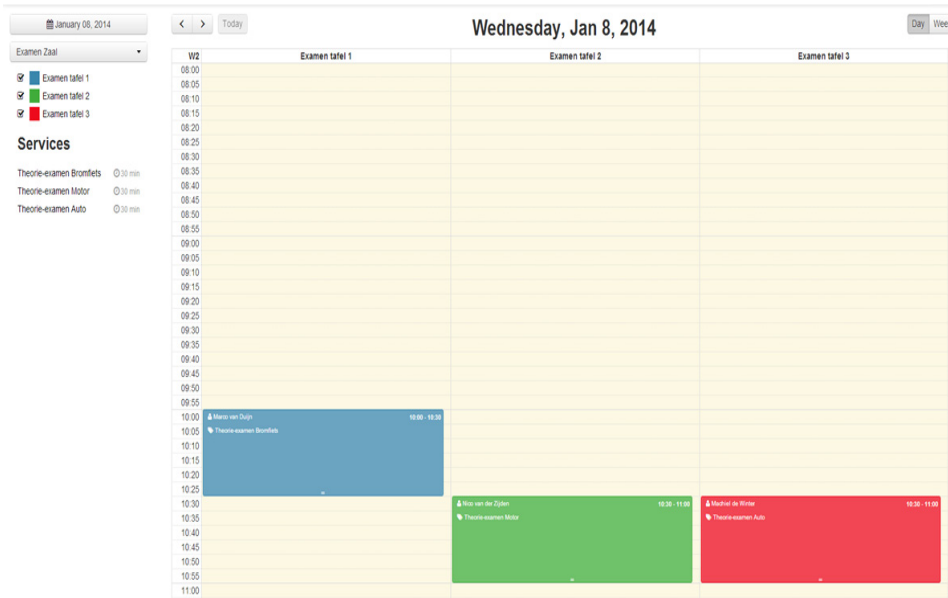
You toggle between the *Day* and *Week* view, using the buttons in the upper right corner of the window.

The *Week* view can be used as an appointment planner, where it is possible to see the overall workload.



The *Day* view shows the appointments for only one day at a time.

By default, the current date is selected, when the Calendar is opened. However, you can select any date or period to view the appointments for it. You can always use the *Today* button to jump back to the current date.



For descriptions on how to book and edit appointments, see the instructions below.

Book an appointment

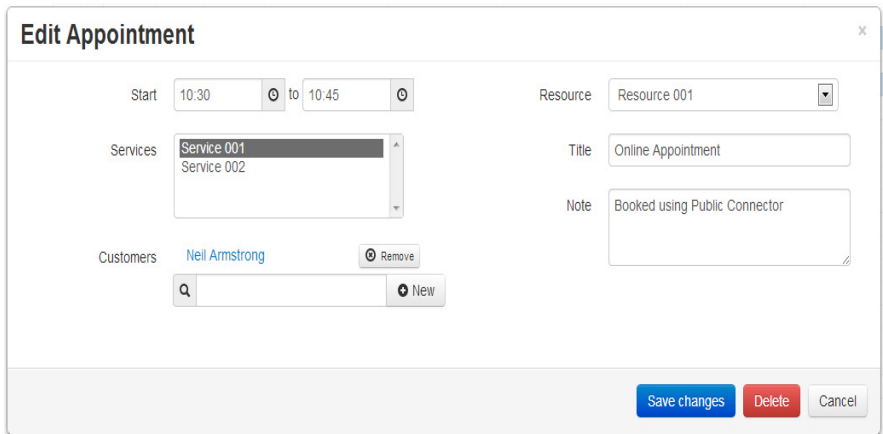
❗ Another way to book appointments is by using the *Appointment Booking* application.

❗ Please note that calendar booking business rules, such as Week Schedules, Resource availability, bookable days, booking threshold percentages etc. specified in the Calendar Administration are only enforced for Appointment bookings made through the Orchestra Calendar Public API. The Orchestra Calendar view does not enforce any of these rules. Being an application meant to be used by internal staff, appointments of any duration and time of day can be made, as well as creating an appointment for an already occupied Resource.

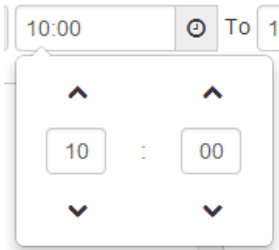
❗ Appointments cannot be created or updated to start in the past in the local time of the selected branch.

To create a booking, drag the wanted Service, from the list of Services to the left, onto the wanted start time in either the *Day* or the *Week* view in the Orchestra Calendar. This way, the appointment duration and Service is automatically set.

The following window is opened:



In this window, select the wanted *From* and *To* times, either by entering the times directly in the fields (in HH:MM format), or by clicking on the clock icon,  , then entering the correct time, using the up and down arrows:



Check the *Blocking* check box, if you want this to be an Appointment that blocks a Resource, so that other Appointments can not be booked for this Resource, for this specific period in time.

 It is not possible to add a Service or a customer to a Blocking Appointment.

For more information, see “Block a resource” on page 43.

Next, select the wanted *Service(s)* (if you want another one than the one you dragged and dropped, or if you want several *Services*) and *Resource*. Add one or several *customers*, by searching for him/her in the customer database, as in the picture below:

You can, of course, also create a new customer, by clicking on the **+New** button. The following window is displayed:

Here, you can enter applicable information about the customer, such as *First Name*, *Last Name*, *Account Number* and *Address*.

It is also possible to add *Title* and a *Note* to the Appointment. Finally, click **Save changes** and the appointment is saved.

If you, instead, want to edit an appointment, click on its box, either in the *Day* view, or in the *Month* view. The same window as above will be opened, with one exception: it is possible to **Delete** the appointment, by clicking on the **Delete**

button, .

It is also possible to change the duration of an appointment, by clicking on the double lines at the bottom of the appointment box, as seen in the picture below, and simply making the appointment box larger or smaller.



To move an appointment, either drag-and-drop its box to the wanted day and time in the calendar, or click on it to edit it, then change the date/time and save the changes.

⚠ To change the date of an appointment, we recommend that you use drag-and-drop, in the *Week* view. This way you have a better overview.

Block a resource

Sometimes one may wish to make it impossible to book Appointments on a certain Resource over a period of time. A staff member, bookable as a Resource, may for example be on a planned vacation between two known dates, or a meeting room could be closed for renovation for a few weeks.

Therefore, in the *Calendar* application, a given Resource can be made unavailable for bookings through the Public API, over a period of time spanning over multiple days.

To create a blocking Appointment, do the following:

1. Select your wanted branch and find the day/time that you want the Resource Block to start.
2. Click the wanted day and time in the Calendar and the *Edit Appointment record* window will open. Now, you can adjust both the start and end date and time to span several days/weeks/months.
3. Mark the *Blocking* check box.
4. Select the applicable *Resource*.
5. Click the *Save* button.

The GUI should now have been updated with an Appointment stretching from your specified start/end date and time. It is possible to move this Appointment or update the date and time, if necessary.

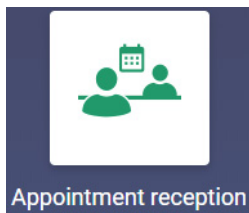
⚠ It is not possible to add a Service or a customer to a Blocking Appointment.

This Resource will now be excluded for all date and time availability queries, during the affected period and no Appointments that would overlap the block can be created over the Public API. It will still be possible to book Appointments for this Resource, even during the blocked period, using the Calendar application - these Appointments will simply be handled as double-bookings just as with normal Appointments for a given Resource.

The Blocking Appointment will not be synchronised with other Orchestra Appointments.

Appointment Reception

To access Appointment reception, open the *Appointment reception* application in the Orchestra *Home* page.



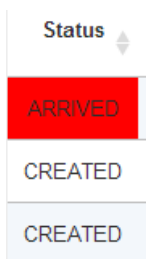
The Reception view gives the reception staff member a list overview of the visitors that have/will arrive for their appointment. Here you can arrive appointments. For more information, see “Set an appointment to arrived” on page 46

Appointments										2019-06-14	
Status	Title	Start Time	End Time	Customer(s)	Resource	Booking Ref	Service(s)	DOB	Arrive	Search	
CREATED	Counseling appointment	14:20	14:35	Martin Yew	r1	7	Counseling		<button>Arrive</button>		
CREATED	Diabetes patient	14:35	14:40	Julie Anden	r1	12	Medical prescription	14/2/1999	<button>Arrive</button>		
CREATED	Mr Clint appointment	14:40	14:45	Bill Clint	r1	9	Medical prescription	23/1/1231	<button>Arrive</button>		
CREATED	Needs guidance	14:45	14:45	Karen Kalli	r1	11	Medical waste disposal	9/6/9988	<button>Arrive</button>		
CREATED	Urgent	14:50	15:00	Peter Woodsen	r1	10	Other	13/1/1323	<button>Arrive</button>		
										Previous	Next

Below the different columns are explained.

Status

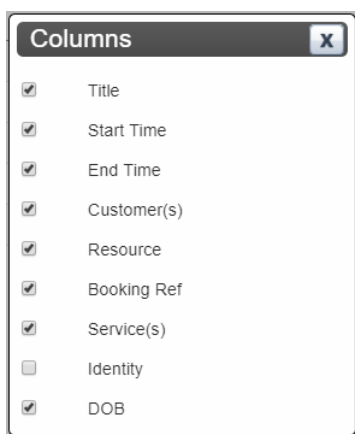
The status of the appointment. Can be Arrived or Created:



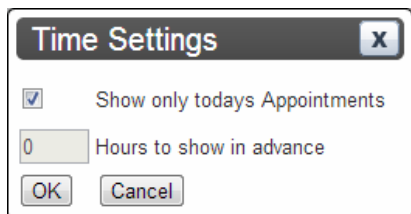
Other information that can be displayed about each appointment is:

- Title - the appointment title
- Start time - the starting time of the appointment.
- End time - the time the appointment ends.
- Customer - the name of the customer(s).
- Resource - the name of the applicable Resource.
- Booking Ref - the booking reference of the appointment
- Service(s) - the name of the services
- Identity - card number of the customer
- DOB - date of birth of the customer

It is possible to customize the information that is displayed, by clicking on the *Column Settings* button, , in the upper right corner. This will open up the *Columns* window, where you can select the wanted columns:



It is also possible to change the Time Settings of the Reception Calendar, by clicking on the *Time Settings* button, , in the upper right area of the window. The *Time Settings* window will be opened:

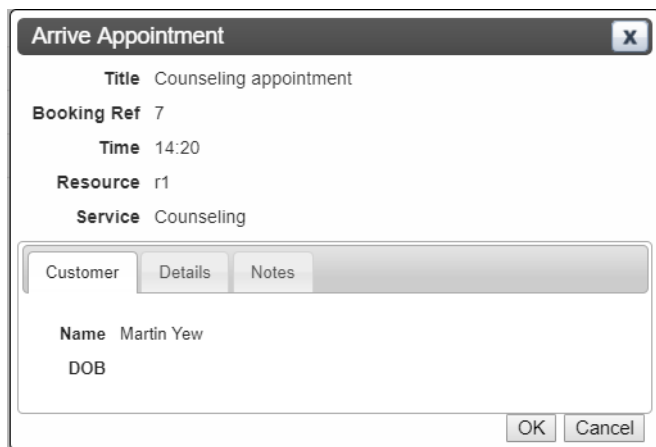


Here, you can decide whether or not only the appointments for the current day should be shown. If not, you can enter how many hours in advance to be shown.

ⓘ It is not possible to see appointments for the next, or coming day(s). These can only be shown in the Calendar client.

Set an appointment to arrived

To set an appointment to arrived, simply click on the *Arrive* button, in the *Arrive* column. The following window, where you can see and update the details of the specific appointment, will be opened:



When you click on the OK button, the appointment will be set to *ARRIVED* and marked with red, as in the Status picture above.

7. Concierge

Topics in this chapter

Introduction	48
Getting started with Concierge	49
Log in	51
Start page	52
Top bar	52
View queue information and edit visits	54
Quick serve	60
Creating an appointment	61
Rescheduling or canceling an appointment	67
Arriving an appointment	69
Creating a visit	73
Accessibility features	77
FAQ Concierge	79

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. Concierge can be used both as a webapp in desktop browsers, or as a native app on tablets. On occasions they differ, that is described in the guide.

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

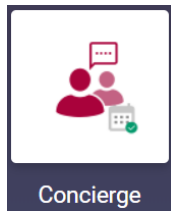
ⓘ What functionality you have in Concierge often depend on the system configuration. In this guide we will go through all available features. If there is a feature that you don't have access to, but you think you should, please contact your system administrator.

Getting started with Concierge

Get started on a desktop

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

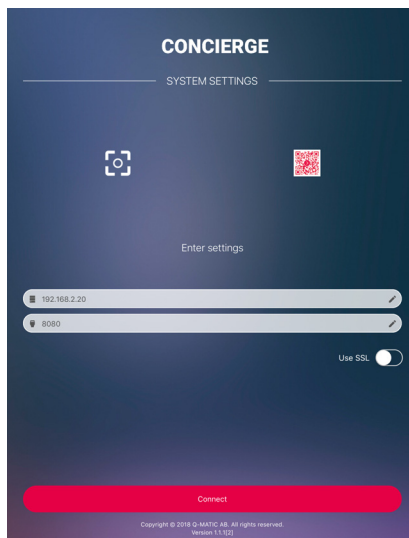
1. Go to `http:<orchestra-ip>:<port>`
2. Click the **Concierge** icon on the Orchestra home page.



Get started on a tablet

To get started with the Concierge on a tablet, please follow these steps:

1. Open the Concierge Agent app on your tablet and enter your system settings:



The following settings should be entered:

- **Server IP/Hostname**
- **Port**

- Whether or not to use SSL

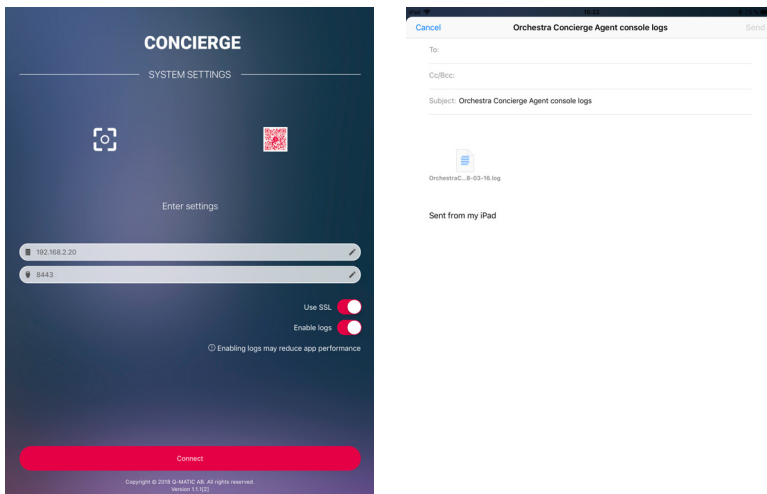
Instead of entering your settings, you can also scan a QR code containing your

settings, by clicking the **Scan settings** icon, . Also, you can share your settings (for example to a colleague or your department), by clicking the **Share**

settings icon, .

- There is also a hidden setting – whether or not to enable logs. It is displayed by long pressing the Concierge heading. By default this is disabled.

If you have enabled this, you can press and hold the **Enable logs** setting, then send the logs, for example via email, as shown in the pictures below:



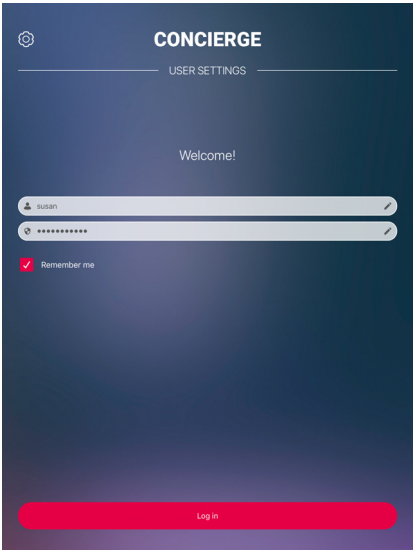
⚠ Enabling logs may reduce app performance.

When done, click **Connect** and you are now ready to start using Concierge.

Log in

After entering the system settings, you will see the user settings page.

⚠ If you log in on a mobile device and the system is setup with SAML, you will be directed to the SAML login page.



Enter username and password. When done, click **Log in**.

⚠ If SAML is enabled, you can only log in with SAML users. Orchestra Superadmin will for example not work.

Select your profile settings

Branch

Downtown General

Select service point

Concierge

☐ Skip next time

Cancel

Apply settings

Then select branch and service point. Check the check box if you want this to be your default setting. When done, press **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.

Start page

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

- Top bar - see "Top bar" on page 52.
- Queue view - see "View queue information and edit visits" on page 54.
- Quick serve - see "Quick serve" on page 60.
- Create appointment - see "Creating an appointment" on page 61.
- Arrive appointment - see "Arriving an appointment" on page 69.
- Edit appointment - see "Rescheduling or canceling an appointment" on page 67
- Create visit - see "Creating a visit" on page 73.

Top bar

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

Log out



To log out from Concierge, press the **Log out** icon.

You will be automatically logged out due to the following:

- Nightly reset - initiated by Orchestra.
- Publish - initiated by Orchestra.
- Auto close - configured in the system.

Return to Orchestra home page



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

Change branch or service point



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

View the online help



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

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


SCAN QR

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. You will also see if there is a note attached to the visit. Hover over or tap on the note icon to see the full note.

< 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.



Search

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


 Activate SMS ticket

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

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:
 - Press the queue name and scroll until you find the wanted visit.

- Search for a visit in the search field by entering the visit ID.
 - Press **Scan QR** and scan the ticket QR code.
4. 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 57
- “Transfer to staff member” on page 57
- “Transfer to counter pool” on page 58

Transfer to queue



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

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



Press **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

×

Search staff member

🔍

Name

Emma Jones

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

Transfer to counter pool



Press **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

×

Search service point

🔍

SERVICE POINT ▼

WebCounterMultiStaff

Connect

🔒

Select the wanted counter pool and confirm the action.

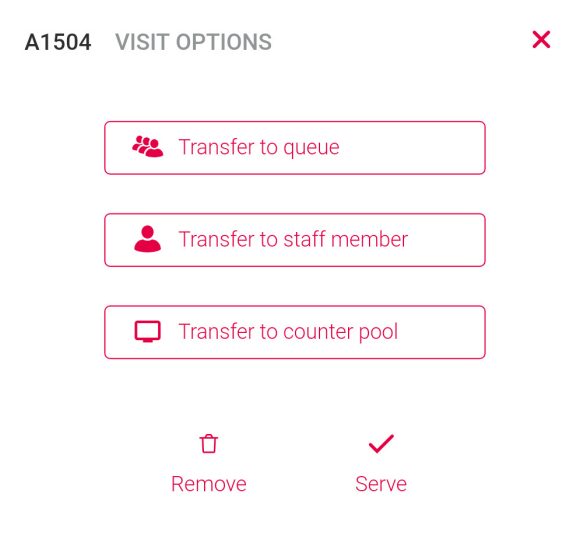
Serve or remove a visit

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

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

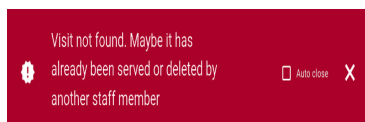
- Search for a visit in the search field by entering the visit ID.
- Press **Scan QR** and scan the ticket QR code.

5. When you have found the wanted visit, choose if you want to **Serve** ✓ or **Remove** 🗑️.



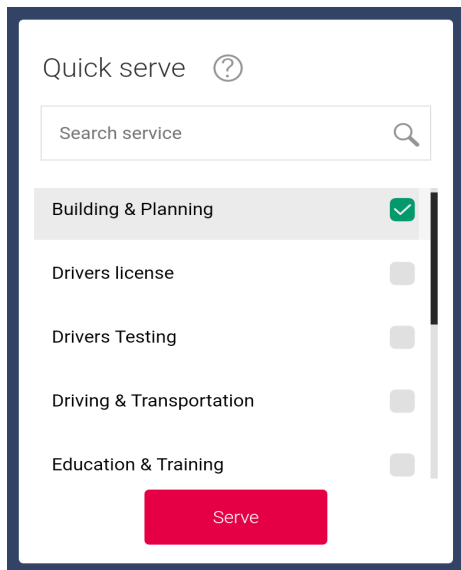
⚠️ The **Serve** icon will be disabled for visits that require an outcome or a delivered service.

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



Quick serve

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



Select a service and then select **Serve**. You have now created, called, and ended a visit by pressing 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.

Creating an appointment



To create an appointment, follow these steps:

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. If you want to go back to the start screen, press **cancel**.

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 mobile app. At the top is a navigation bar with a series of steps: 'Create appointment' (with a calendar icon), 'Select branch' (highlighted in white), 'Select service', 'Date & Time', 'Add customer', 'Confirm', and 'Cancel'. Below the navigation bar, the title 'Select branch' is displayed. Underneath, there's a 'Selected branch' section showing 'Downtown General' with a red trash icon. A search bar labeled 'Search branch' with a magnifying glass icon is positioned below. To the right of the search bar is a green checkmark icon followed by the text 'Skip this step ?'. Below the search bar, a section titled 'ALL BRANCHES' contains a list of four branches: 'Downtown General', 'Gothenburg', 'LongBeach', and 'Los Angeles'. Each branch name is in a white box, and to the right of each box is a small circular icon with an 'i'. At the bottom right of the screen is a large red button labeled 'DONE'.

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, uncheck the **Skip this step** check box.

3. In the *Select service* step, a list of services will be shown.

The screenshot shows the 'Select service' step of the appointment creation process. At the top, a dark navigation bar contains icons and labels for 'Create appointment', 'Select branch', 'Select service' (highlighted in red), 'Date & Time', 'Add customer', 'Confirm', and 'Cancel'. Below the navigation bar, the 'Select service' section features a search bar with the placeholder 'Search service' and 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 'ALL AVAILABLE SERVICES' containing 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, check 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), press **Done**.

4. The next step is to 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 wanted 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.

+

Create appointment

Select branch

Select service

Date & Time

Add customer

Confirm

Cancel

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

Reservation will expire in:

09:53

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



When you search for a customer in the *Link customer* step, you have the option to edit the customer record. Press the **edit** icon to open the Edit selected customer window. Press **Save & Add** to save the customer record and add the customer to the appointment.

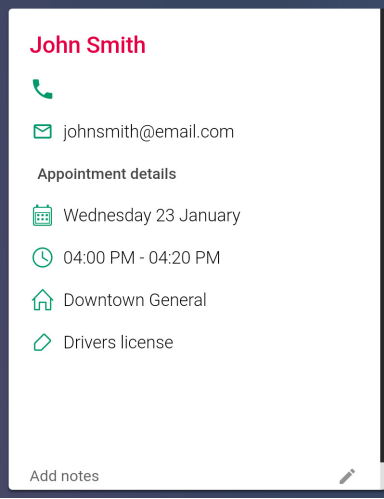
Create new customer

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** Should only contain numbers 0-9, no plus signs, dashes, slashes, or other characters.
- **Date of birth**
- **Notification language**

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

6. The *Confirm* step will be 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 the phone icon is a green envelope icon followed by the email address "johnsmith@email.com". Below the email address is the text "Appointment details". Underneath this text is a green calendar icon followed by "Wednesday 23 January". Below the date is a green clock icon followed by "04:00 PM - 04:20 PM". Below the time is a green house icon followed by "Downtown General". Below the location is a green diamond icon followed by "Drivers license". At the bottom of the card, there is a text input field with the placeholder "Add notes" and a small green pencil icon to its right.

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, press **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 record.

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.

Rescheduling or canceling an appointment



To reschedule or cancel an appointment, follow these steps:

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, press the **Edit** icon to select a new time interval. Select a start time and an end time, and press **Apply**.



To refresh the list of appointments, press the **Refresh** button. 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 press **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

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 press **Reschedule**.

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

Arriving an appointment



To arrive an appointment, follow these steps:

1. On the start screen, select **Arrive 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					SCAN QR	
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, press the **Edit** icon to select a new time interval. Select a start time and an end time, and press **Apply**.

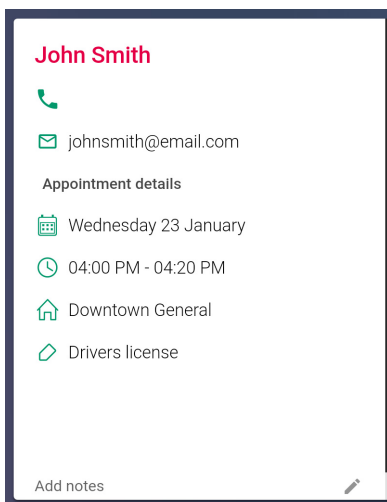


To refresh the list of appointments, press the **Refresh** button. After refreshing, the button is disabled for 30 seconds.

- Booking ID - Find the appointment by entering the external Appointment ID. Enter the full Appointment ID, then press **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 arrive.
- 4. The *Confirm* step will be opened, where you can see the details of the appointment.



The screenshot shows a confirmation screen for a patient named John Smith. At the top, the name "John Smith" is displayed in red. Below the name is a green telephone icon. Underneath the icon is an email address "johnsmith@email.com" preceded by a green envelope icon. A section titled "Appointment details" follows, containing four items: "Wednesday 23 January" with a green calendar icon, "04:00 PM - 04:20 PM" with a green clock icon, "Downtown General" with a green house icon, and "Drivers license" with a green document icon. At the bottom left, there is a text input field labeled "Add notes". At the bottom right, there is a small green pencil icon.

5. Select a notification method.

VIP

☐ Level 1

☐ Level 2

☐ Level 3

Select notification method

What type of notification does the customer prefer?

 SMS

 Print ticket

Ticketless

You may also have the option to select a VIP level for the appointment here. 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.

The option Ticketless creates a visit, without printing a ticket or sending an SMS. If Print ticket and/or By SMS is selected, Ticketless cannot also be selected and vice versa.

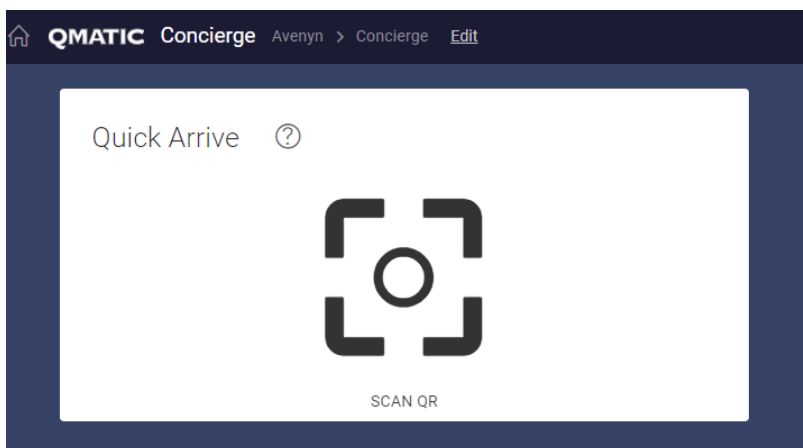
6. Optionally, before confirming the arrival of the appointment, you can open *Edit services* and edit the service(s) that are connected to the appointment.

7. 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. Enter a phone number and press **Finish**. The phone number will be saved to the customer record.

The appointment will be placed in a queue and thus get a visit ID assigned to it.

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.

Creating a visit



To create a visit, follow these steps:

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, press the **info** icon next to the service.

Select service

Search service

☒ Enable multiservice

FREQUENT SERVICES

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

ALL AVAILABLE SERVICES

- Building & Planning

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, check 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), press **Done**.

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

 Create visit Select service **Add customer** Confirm [Cancel](#)

Select customer ☐ Skip this step 

LINK EXISTING 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

DONE

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.

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

3. In the *Confirm* step, you will see the details for the visit to the left. You may have the option to add notes to the visit.

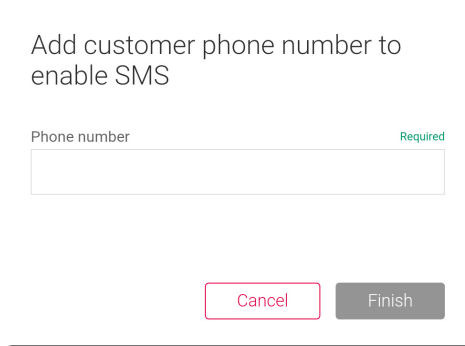
You may also have the option to select a VIP level for the visit here. Select the wanted radio button.

- ⓘ *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.

ⓘ If *Print ticket* and/or *SMS* is selected, *Ticketless* cannot also be selected and vice versa.

When done, press **Confirm**.

5. 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 press **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: a pink "Cancel" button and a grey "Finish" button.

A confirmation message containing the visit ID will be displayed.

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.

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 **tab**, and then **enter** to go directly to that object.
 - a) First shortcut links to **Quick Serve/Quick Create**
 - b) Second shortcut links to **Menu bar**

Navigating in the date picker

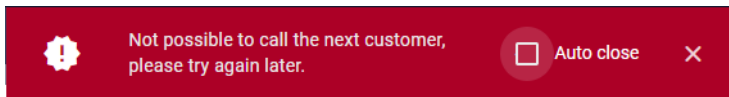
When creating an appointment, there is a date picker to select a date. You can use the keyboard to navigate in the date picker in the following ways:

- 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 the **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 the **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.

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.

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

Index

- A
 - Accessibility features
 - Concierge 77
 - Counter 35
 - Application 8
 - Arriving 69
- B
 - Booking 40
- C
 - Calendar view 38
 - Calling 16
 - calling ticket 16
 - close transaction 34, 35
 - Closing the workstation 35
 - Concierge 47
- D
 - Day view 40
 - Delivered Service 27
- F
 - Finish 34
- L
 - Linking a customer 23
- login 6
- M
 - Marks 29
- N
 - No show 33
- Notes 23
- O
 - Outcomes 29
- P
 - Parking 30
 - Pools 33
- Q
 - Queue information 14
- R
 - recall ticket 30
 - Recalling 29
 - Recycling 30
 - role 8
- T
 - ticket
 - calling 16
 - recall 30
 - transfer 30
- Timeout 10
- transfer ticket 30
- Transferring 30
- V
 - Visit 4
- W
 - Walk direct 17
 - Week view 39

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