

QMATIC

Manual

Calendar 2.0

254.01G

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1. What's new

Version	Chapter	Change
01.A	• General	• Manual for PS Calendar created
01.B	• Calendar Client	• Color coding for multiple blocks added
	• Calendar Settings	• Sections for Blocking form and Events and popups added
01.C	• General	• New name Calendar 2.0
01.D	• Calendar Client	• Description of appointment for selected resource in different branch added • Pop-up warning if booking when there is a conflict
	• Calendar Settings	• Possibility to enable check for appointment conflicts and automatic calculation of appointment duration
01.E	• Calendar Settings	• Section for miscellaneous settings added
01.F	• Blocking Manager	• Info about blocking multiple resources added.
	• Calendar Settings	• Added setting for enabling recurring appointments • Added settings for enabling Outlook integration • Added section about date formats
	• Calendar Client	• Added section about how to creating recurring appointments.

Version	Chapter	Change
01.G	• Calendar settings	• Added settings for: • Remote appointments • Enable confirmation dialog when dragging an appointment. • Added information about language selection in header.

2. Introduction

Topics

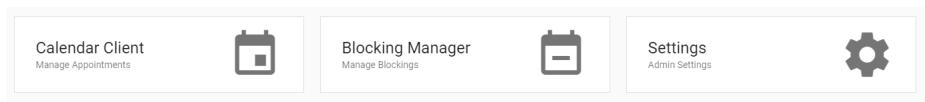
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2.1 Overview

This guide presents the standard procedures and features in the Calendar 2.0 application.

Calendar 2.0 has three parts:

- Calendar Client, where you can get an overview of the appointment calendar, create, edit and remove appointments, create and edit customer and see available resources.
- Blocking Manager, where you can block timeslots from the calendar.
- Settings, where you configure the calendar.



2.2 Installation

2.2.1 Prerequisites

- Calendar Admin needs to be installed and configured.

2.2.2 Install Calendar 2.0

1. Copy ps-calendar.war to <Orchestra_install_dir>\system\custdeploy.
2. Add the file psCalendarMessages.properties to <Orchestra_install_dir>\system\conf\lang.
3. Add the content from the file commonMessages.properties in the Calendar 2.0 package to the file commonMessages.properties, located in <Orchestra_install_dir>\system\conf\lang.
4. To make the required changes to the qp_central database, execute update_central.sql from the sql folder.
5. Restart Orchestra Central.
6. Create users and roles with the wanted access rights. See “2.3 Access rights” on page 4.

2.3 Access rights

Users of Calendar 2.0 need to be assigned a role with the following access modules:

- Appointment

-
- Calendar
 - Calendar 2.0
 - Connector ServicePoint

The following access modules are optional, depending on what the user needs to be able to do:

- Calendar Blocking Manager - for access to the blocking manager
- Calendar Client - for access to the calendar client
- Calendar Client Read Only - if the user should only be able to see the information in the calendar client
- Calendar Settings - for access to managing the calendar settings

3. Calendar Client

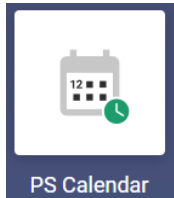
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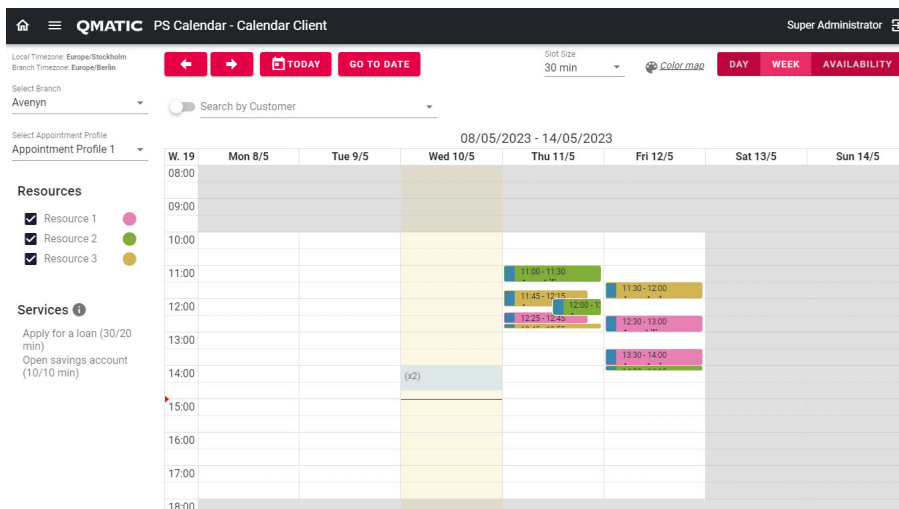
3.1 Overview

! There are two different sets of access rights for Calendar Client: one for viewing only and one for creating and editing appointments.

To open Calendar Client, open the Calendar application from the Orchestra home page.

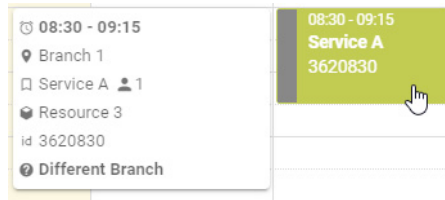


The calendar view shows the booked appointments in a calendar. The first time you open the application, you need to select a branch and an appointment profile.



- Hover over an appointment to see more appointment details.
- The gray area are hours outside opening hours.
- In the top left corner, you see the local timezone and the branch timezone
- In the left pane, change which branch, appointment profile to show. You can also select and unselect resources to show.
- In the left pane, you also see the available services together with the service duration and the additional customer duration.
- Toggle dates by using the right and left arrow above the calendar. Click **Today** to see today's date or use **Go to date** to see a specific date.

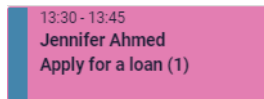
- If you have enabled showing appointments from other branches, you can see reserved slots for a selected resource at a branch that you do not have access to. You cannot see the customer details or edit the appointment.



3.1.1 Color-codings

In the calendar view you see different colors. There are three types of color-codings:

- Resource: Shows the color of the resource.
- Blocking: Shows if the blocking is a global, branch, resource, week schedule block or multiple resources.
- Status: Shows which status the appointment has in the system: created, arrived, called etc.



For example, in this appointment, pink is the color of the resource and blue is the color of the status (created).

Hover over **Color map** above the calendar to show an explanation of the different colors.

Blockings	
	Global Block
	Branch Block
	Resource Block
	Week Schedule Block
	Multiple Blocks
Status	
	Reserved Reserved slot
	Created Appointment created in the system
	Arrived Customer arrived and visit created
	Called Ticket called at counter
	Completed Ticket closed at counter
	No show Ticket called at counter, No show used at counter
	Deleted by reset Ticket removed by publish or system reset
	Never arrived Appointment never arrived, no ticket was printed
	Different Branch Appointment from a different branch

! The blocking colors can be changed in the settings.

3.1.2 Change slot interval

To change the time scale in the calendar view, select a time interval from the Slot Size drop-down list. For example, if you select 30 min the day will be shown divided in 30-minute periods.

The default slot size comes from the selected appointment profile.

PS Calendar - Calendar Client

←

→

TODAY

GO TO DATE

Slot Size

30 min

Color map

Wednesday 10/05/2023

W. 19	Resource 1	Resource 2
10:00		
11:00		
12:00		
13:00		

3.1.3 Day view, week view and availability view

The following views are available in the calendar:



Day view: Shows the appointments and blocks for the selected day for each resource.

Week view: Shows an overview of the appointments and blocks for the selected week, divided into days.

Availability view: Shows the availability of all resources for a selected day. An empty space shows when a resource is available.

3.1.4 Search for appointments

Above the calendar, there is a search field where you can search for appointments. You can toggle between searching by customer or by booking id. When searching for a customer, a list with all appointments for the customer is shown.

The search interface consists of two rows. The top row has a toggle switch on the left, currently set to 'Search by Customer', followed by a text input field and a small downward arrow. The bottom row has a toggle switch on the left, currently set to 'Search by Booking Id', followed by a text input field containing the number '123'. To the right of the input fields is a green rectangular button with the word 'SEARCH' in white capital letters.

3.2 Book an appointment

! Calendar booking business rules specified in Calendar Admin - such as resource availability, bookable days, booking threshold percentages etc - are not enforced when booking appointments through the Calendar Client. This means that it is possible to book appointments of any duration in any time of the day.

! The fields and options available when booking an appointment depend on the configuration in Settings > Appointment Form. Depending on the system setup, some fields may be optional, required, or not visible.

To book an appointment:

1. Drag a service to the wanted start time in the calendar or mark a time slot.
The following window opens:

Appointment

Suggested duration: 10 min

Appointment Date

09/11/2022

Starts at

9:00

Ends at

9:45

Resource

Resource 3

Title

Notification Type

Email

Services

Service A

Customers

John Smith

Notes

my notes

8 / 255

SAVE

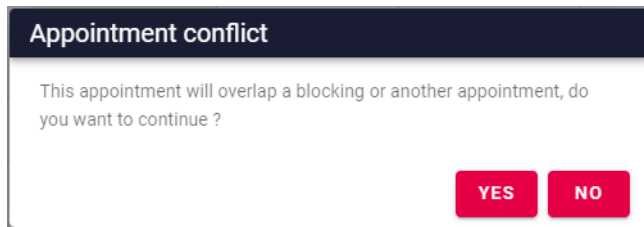
CANCEL

! If recurring appointments are enabled, you will also see an end date. If you only want to create a single event, you don't need to care about the end date.

2. Select a resource for the appointment

-
3. To add a customer, type at least three characters in the customer search field. To create a new customer, click the **Create customer** icon . See “3.4 Create a customer” on page 14.
 4. If you want to increase or decrease the number of people for a service, click the red dots next to that service. Depending on the settings, you may be able to specify the number of adults and children. When adding more people, you can see that the suggested duration in the top right corner changes.
 5. Optionally, add a title and a note (max 255 characters).
 6. Depending on the settings, you can select a notification type.
 7. Click **Save**.

ⓘ If **Enable a check on appointment overlap during save** is enabled in the settings, a pop-up will appear if the appointment conflicts with a blocking or a booking for the same resource(s).



To edit the appointment, find it in the calendar and click on it.

To delete an appointment, click on it to open it, then click **Delete** .

3.3 Create a recurring appointment

1. Drag a service to the wanted start time in the calendar or mark a time slot when the first appointment in the series should take place.
2. Select an end date, which is when the appointment series will end.
3. Select if the appointment should recur daily, weekly or monthly.
 - If weekly, select if the appointment should be repeated every week, every two weeks etc. Also select, which day or days of the week the appointment should take place (more than one day per week is possible).
 - If monthly, select if it should take place on a specific day each month (e.g. January 3, February 3 etc.) or on a specific weekday (e.g. the first Monday every month).
4. Fill in the rest of the appointment details.
5. Save. If there are many appointments in the series, you will see a progress bar. If you click **Cancel** during this process, the saving process will stop, but any appointment that has already been added will remain.

When you edit an appointment in a series, the appointment will be detached from the series. The other appointments in the series won't be affected. It's not possible to edit a whole appointment series.

To delete an appointment series, select an appointment in the series and click **Delete**. Select **Whole series** when it asked if you only want to delete the current event or the whole series. All appointments in the series will be deleted, except for past appointments.

3.4 Create a customer

To create a new customer you need to create or edit an appointment.

1. In the Create appointment flow, click **Create customer** 
2. Add the following information:
 - First name
 - Last name
 - Email
 - Phone number
 - Date of birth
 - Identification number
 - External ID
 - Address
 - Language

-
- Which fields that are available and required can be changed in the settings.
3. Click **Save**.

4. Blocking Manager

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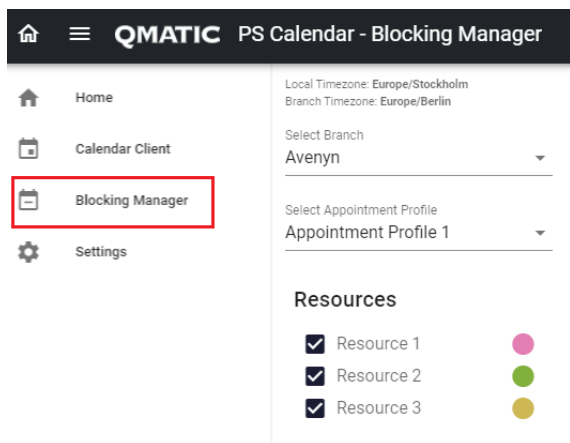
4.1 General information

In Blocking Manager you can add blocks to the calendar when appointments cannot be booked.

- Blocks can be applied to resources, appointment profiles, branches or the whole organization
- The blocks only affect the public booking API, i.e. appointments booked with Qmatic Web Booking, Concierge or similar. Calendar Client is not affected by blocks.

4.2 Overview

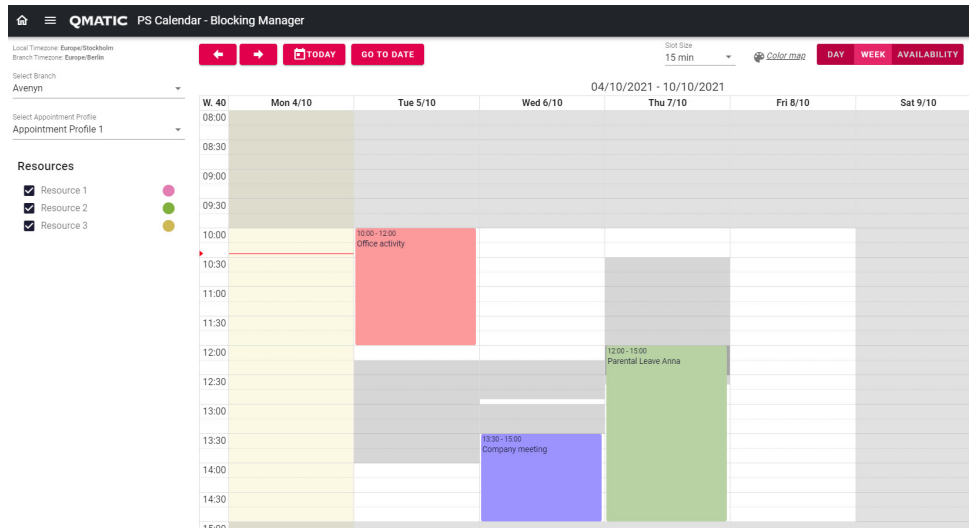
To open Blocking Manager from Calendar Client, open the side menu and select Blocking Manager.



The calendar blocking view shows the blocked appointments for a selected branch, appointment profile and resource.

The view is similar to the ordinary calendar view. The difference is that booked appointments are shown in gray while the blocks are in color and more prominent.

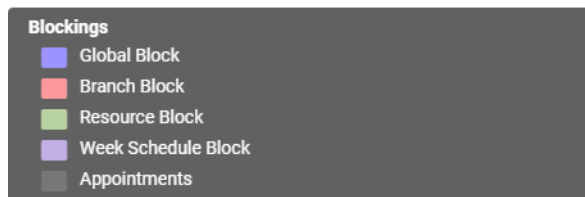
The first time you open the application, you need to select a branch and an appointment profile.



4.2.1 Color codings

The blocks have different colors depending on the blocking type.

Hover over **Color map** above the calendar to show an explanation of the different colors.



- ⓘ Blocking colors can be changed in Settings.
- ⓘ Week schedule blocks can only be added from Calendar Admin.

4.3 Add an appointment block

1. Mark a time for the block in the calendar. The following window is opened:

Blocking

Start Date 08/10/2021 End date 08/10/2021 Starts at 11:00 Ends at 11:30

Blocking Type Resource Blocking Resource

Blocks a single resource

Title

Notes

SAVE CANCEL

- The time you marked in the calendar is automatically selected. If wanted, select another start date, end date, start time or end time.

ⓘ If you select more than one day, you will have the option to set a recurring block. To extend the block over the selected period, select **No recurring**. For more information, see “4.4 Add recurring blocks” on page 21.

- Select a blocking type
 - Resource blocking - add a block for one or several resources. Select for which resources the block should apply.
 - Appointment profile blocking - add a block for all resources for the current appointment profile
 - Branch blocking - add a block for the current branch
 - Global blocking - add a block for all branches. Note that global blocks only can be used when all branches are in the same time zone.
- Optionally, add a title and a note
- Click **Save**.
 - To delete a block, click on it to open it, then click **Delete** .
 - To edit a block, click on it to open it, make the wanted changes, then click **Save**.

ⓘ Due to a known limitation, global blocks cannot be edited. They need to be deleted, then recreated.

4.4 Add recurring blocks

1. Mark a time for the block in the calendar.
2. Select a start date and an end date for when you want the recurring block to occur (e.g. from Jan 1 to Dec 31).

The screenshot shows a 'Blocking' form with the following fields and values:

- Start Date:** 11/10/2021 (with a calendar icon)
- End date:** 15/10/2021 (with a calendar icon)
- Starts at:** 11:00 (with a clock icon)
- Ends at:** 12:00 (with a clock icon)
- Recurrence:** Monthly (dropdown menu)
- Type:** *th week day (dropdown menu)
- First:** First (dropdown menu)
- Week Day:** Monday (dropdown menu)
- Blocking Type:** Appointment Profile Blocking (dropdown menu)
- Description:** Blocks all resources on the appointment profile
- Title:** Team meeting
- Notes:** A large text area for additional notes.
- Buttons:** SAVE and CANCEL (red buttons at the bottom right).

3. Select a recurrence pattern:
 - Daily
 - Weekly - for this option, you can select if the block should recur every week, every two weeks etc, and on which weekday
 - Monthly - for this option you can select if the block should recur on a specific day of the month (e.g. the 1st), or every first/second/etc weekday (e.g. the last Monday every month).
 - No recurrence

ⓘ Resource blocks and appointment profile blocks can be deleted as a series, while branch and global blocks only can be deleted individually.

5. Calendar settings

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5.1 Calendar settings

To configure the settings for Calendar, go to Menu  > Settings, or click the Settings panel on the start page.

ⓘ Booking rules and other settings that define how appointments can be booked, are set in the Calendar Admin application.

ⓘ The calendar settings are global, i.e. valid for the whole organization.

5.2 Appointment Form

To configure the settings for the appointment form, go to Settings > Appointment Form. The following settings are available:

- **Fields**
 - **Default Notification Type:** Select if the notification type option should be required, visible but not required, or not shown at all.
 - **Remote Appointment:** Select 'Visible' to display a "This is a remote appointment" checkbox in the appointment form. This allows users to indicate whether an appointment is remote, e.g. via video conferencing app.
 - **Notification Type:** Select which option should be the default notification type (None, SMS, Email or Both).
 - **Activate number of children:** Check this checkbox if you want to be able to specify number of adults and children per service (not just number of people).
 - **Disable saving the same service multiple times based on number of people:** Check this checkbox if you only want to save a service once and save the number of people in a custom field.
 - **Enable a check on appointment overlap during save:** Check this checkbox if you want the system to check for appointment overlaps when saving an appointment.
 - **Enable automatic calculation of duration when services and/or number of people changes:** Check this checkbox if you want the system to calculate the appointment duration time based on the selected services and number of people.
 - **Enable recurring appointments:** Check this checkbox to enable recurring appointments.

ⓘ When enabling recurring appointments, make sure to disable **Enable a check on appointment overlap during save**. If both are enabled, a

warning will be shown when booking a recurring appointment since the system won't check for conflicts (risk of system overload).

- **Enable confirmation dialog when dragging an appointment:** Check this checkbox to require confirmation when moving an appointment using drag and drop in the Calendar Client.

5.3 Blocking Form

To configure settings for blockings, go to Settings > Blocking Form.

- **Enable Global Blocking:** Check this checkbox to activate global blockings. Global blockings apply to all branches in the organization.



Do not use this option if your system has multiple time zones.

5.4 Event and Popups

To enable or disable visibility of appointment properties in the events or popups, go to Settings > Event and Popups.

If you want blockings to open a popup with information in the Calendar Client view, enable the checkbox **Show background resource tooltip**.



The information is not available if there are multiple blocks in the same time frame.

5.5 Customer Form

To configure which fields should be included in the customer information form, go to Settings > Customer Form.

The following fields are available:

- First Name
- Last Name
- Email
- Phone
- Date of Birth
- Identification Number
- External Id
- Address Line 1
- Address Line 2
- Post Code

- City
- State / Province
- Country
- Language

Select if the field should be only visible, or if it should be required.

5.6 Country Code

To configure the settings for country code, go to Settings > Country Code. The settings for country code are used for the customer phone number field. The following settings are available:

- **Select which countries to show in the list:** If no countries are selected, all country codes are included.
- **Select default country code:** Select what should be the preselected (default) country code.
- **Select which country codes to show in the top of the list:** List the most frequently used country codes. They will be shown in the top of the list of available country codes.
- **Enable country flags:** Check this checkbox if a flag should be shown together with the country code.

5.7 Customer Languages

Define which languages that should be available when creating a customer. You can also select what the default language should be by clicking on it.

The languages you add should match the languages you have configured in Notification Admin.

5.8 Blocking colors

Define which color each block type should have. Click **Edit**  and select a color, or enter a color code manually. You can select a color for the following block types:

- Global block
- Branch block
- Resource block
- Week Schedule block
- Merged block
- Outlook overlay

5.9 Slot Size

Calendar users can select a time interval to change the scale of their calendar. The most common calendar time intervals are 5 minutes, 15 minutes, 30 minutes and 60 minutes.

PS Calendar - Calendar Client

←

→

TODAY

GO TO DATE

Slot Size

30 min

▼

Color map

Wednesday 10/05/2023

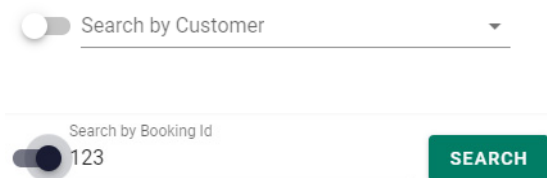
W. 19	Resource 1	Resource 2
10:00		
11:00		
12:00		
13:00		

In Settings > Slot Size, it's possible to change the time intervals available for users to select. You can add your own time intervals and arrange them by moving them up and down.

The default slot size comes from the selected appointment profile.

5.10 Miscellaneous

- **Enable Search Toolbar:** Check this checkbox to enable a search field above the calendar where you can search for appointments. You can toggle between searching by customer or by booking id.



- **Disable Stat Events:** Check this checkbox to disable the saving stat events when appointments are created, changes or deleted. Due to a known bug in Orchestra, stat events should be disabled if SAML is used.
- **Show appointments from other branches using the same resources:** Check this checkbox to show appointments from other branches. It will allow you to focus on the resource availability. This option is a must for systems that share resources between branches.
Unchecking this checkbox will filter out appointments from other branches.
- **Extend appointment by dragging:** Check this checkbox to allow dragging the bottom of any appointment to quickly change the duration of the appointment. This will also works for blockings except global blockings.
- **Only show working days in Week view:** Check this checkbox to make the week view show only the weekdays active in the Display Week schedule assigned to the selected appointment profile.
- **Enable Outlook Integration:** This feature can only be enabled if you have the Outlook integration back-end installed. Contact a Qmatic representative if you want to know more.

5.11 Date and time formats

The date and time formats displayed in Calendar Client comes from the configuration in General Admin. Refer to the General Admin documentation to see how to set up time and date formats for different languages and regions.

If there are no formats set up for a language in General Admin, the system will use the date and time formats in the language file as fallback.

5.12 Language selection in the header

The Calendar application can display a language selection drop-down in the header.

The availability of the language selector is controlled by a global setting ("Enable user language selection in header (for supported modules)" in the General Admin application.

When this setting is enabled, supported applications display a language selector in the header.

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