

# QMATIC

MANUAL

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# COUNTER

252.01J



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# 1. What's new

| Version | Chapter                                                                  | Change                                                                                                                                                                                                                                                                                    |
|---------|--------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01.A    | <ul style="list-style-type: none"><li>General</li></ul>                  | <ul style="list-style-type: none"><li>Separate manual for Counter created. Removed from Orchestra user guide.</li></ul>                                                                                                                                                                   |
| 01.B    | <ul style="list-style-type: none"><li>Installation &amp; Setup</li></ul> | <ul style="list-style-type: none"><li>Settings for hiding customer search and customer details added.</li></ul>                                                                                                                                                                           |
| 01.C    | <ul style="list-style-type: none"><li>Installation &amp; Setup</li></ul> | <ul style="list-style-type: none"><li>Setting for showing customer language added</li><li>Branch level setting for sending parked visits to counter pool added</li><li>Equipment level settings for no-show queue and sorting order added</li></ul>                                       |
|         | <ul style="list-style-type: none"><li>Using Counter</li></ul>            | <ul style="list-style-type: none"><li>Possibility to see customer language in queue view added.</li><li>Option to park to counter pool added</li><li>Information about no-show button in the Confirm needed dialog can lead to customers being sent to a predefined queue added</li></ul> |
| 01.D    | <ul style="list-style-type: none"><li>Using Counter</li></ul>            | <ul style="list-style-type: none"><li>Added note that all visits in a queue are automatically shown if there is only one queue in the work profile.</li><li>Replaced screenshots with the new design</li></ul>                                                                            |

| Version | Chapter                  | Change                                                                                                                                                                                                                                                                           |
|---------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01.E    | • Using Counter          | • Add Info fields (custom parameters) in visit card description                                                                                                                                                                                                                  |
|         | • Installation and setup | • Add custom parameter settings to unit type configuration on equipment profile level.                                                                                                                                                                                           |
| 01.F    | • Installation and setup | <ul style="list-style-type: none"> <li>• Add options for country codes in the list of settings on equipment level in the unit type.</li> <li>• Add configuration option to show and edit customer language</li> <li>• Add instructions for user mapping configuration</li> </ul> |
|         | • Using Counter          | • Add customer language as information available in visit card                                                                                                                                                                                                                   |
| 01.G    | • Using Counter          | <ul style="list-style-type: none"> <li>• Add Find ticket field</li> <li>• Update description of custom info fields</li> <li>• Add option to transfer or remove visits from pool</li> <li>• Add possibility to add language to walk-in visit.</li> </ul>                          |
| 01.H    | • Using Counter          | • Add "Overdue" column in queue information view and visit information view which shows how long overdue an appointment is.                                                                                                                                                      |
|         | • Installation and setup | <ul style="list-style-type: none"> <li>• Add showing overdue time option for appointment visits</li> <li>• Update information about mapping users to branch, service point and work profile.</li> </ul>                                                                          |
| 01.I    | • Installation and setup | • Add information about Custom URL / Customer details button.                                                                                                                                                                                                                    |

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| Version | Chapter                                                                  | Change                                                                                                                                                                      |
|---------|--------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01.J    | <ul style="list-style-type: none"><li>• Installation and setup</li></ul> | <ul style="list-style-type: none"><li>• Added information about configuring and using Marks.</li><li>• Added information about using custom field for time input.</li></ul> |



# 2. Installation and setup

## Topics in this chapter

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| Installation .....   | 6 |
| Access rights .....  | 7 |
| Set up Counter ..... | 8 |

## 2.1 Introduction

Counter is a staff application for calling and serving customers.

This chapter presents the installation and setup procedure for Counter.

### 2.1.1 Requirements

- Counter requires Qmatic Orchestra 7, or later.

## 2.2 Installation

If you install Counter from Xtend, please proceed to step 5.

1. Copy counter.war to <Orchestra\_install\_dir>\system\custdeploy.
2. Add the file counterMessages.properties to <Orchestra\_install\_dir>\system\conf\lang.
3. Make the required changes to the qp\_central database.

#### Postgres

```
update qp_central.applications set url = 'counter' where  
id = 'workstation';
```

```
update qp_central.applications set enabled = 0 where id  
= 'counter';
```

```
update qp_central.applications set is_distributed = true  
where id = 'counter';
```

#### MSSql

```
use qp_central
```

```
update qp_central.applications set url = 'counter' where  
id = 'workstation'
```

```
update qp_central.applications set enabled = 0 where id  
= 'counter'
```

```
update qp_central.applications set is_distributed = 0  
where id = 'counter'
```

#### Oracle

```
update qp_central.applications set url = 'counter' where  
id = 'workstation';
```

```
update qp_central.applications set enabled = 0 where id  
= 'counter';
```

---

```
update qp_central.applications set is_distributed = 0
where id = 'counter';
```

4. Restart Orchestra Central.
5. Create roles and users. See “2.3 Access rights” on page 7
6. Do the rest of the setup by adding and configuring unit types. See “2.4 Set up Counter” on page 8.

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

ⓘ Note that Orchestra installation package comes with an older version of Counter with the corresponding installation file `workstation.war`. This will still be deployed, but hidden when installing `counter.war` from Xtend.

## 2.3 Access rights

Counter users need to be assigned to a role with the following access modules

- Counter
- Connector ServicePoint

## 2.4 Set up Counter

After installing Counter in Qmatic Orchestra, you need to configure the Counter unit type or unit types. This is where you define the functionality in Counter. To read about each setting in the unit types in detail, please see the Standard Unit Types Guide.

### 2.4.1 Counter unit types

There are several unit types for Counter, depending on which hardware you will use:

- WebCounterMultiStaff
- WebServicePoint
- WebServicePoint\_D924
- WebServicePoint\_D924\_WebCFU
- WebServicePoint\_D948
- WebServicePoint\_Expressia
- WebServicePoint\_Expressia\_D924
- WebServicePoint\_PositionalDisplay
- WebServicePoint\_PositionalDisplay\_WebCFU

### 2.4.2 Add unit types on global level

1. In **System Administration**, add the wanted Counter unit type or unit types.
2. Check if there is any configuration you need to do. On this level, you can only change name, description and the minimum time between two calls.
3. Save

### 2.4.3 Configure unit type on equipment profile level

1. In **Business Configuration > Operation Profile**, add the Counter unit types to the wanted equipment profiles.
2. On this level, there are quite a few settings that need to be configured. For example, you can configure:
  - if staff needs to confirm that the customer has arrived
  - if customer marked as “no-show” in the confirm needed should be sent to a queue instead of being removed (and how they should be sorted in that queue)
  - settings for multi service and marks. For more information about marks, see “2.4.6 Enabling and using Marks” on page 10.

- 
- how transfer should work
  - if the buttons for recycle, recall, no-show and wrap-up should be available
  - which custom fields should be displayed and which should be editable. You can also use the “Custom parameter time input” setting to indicate which custom field is used as time input. Note that this setting needs to match the custom field used in Concierge, otherwise “Added time” will not be displayed on the visit information card.
  - if you want to hide customer details and the customer search field
  - if waiting time since appointment time should be displayed for appointment visits (will be shown in the “Overdue” column)
  - the default country code in phone number fields and preferred countries to be displayed in the top of the list of country codes
  - if a custom URL, based on a template with user and visit specific parameters, should be available via a button placed on the visit information card and opened automatically when a visit is called (see “4.1 Custom URL integration with visit and user data” on page 30).

### 3. Save.

## 2.4.4 Configure unit type on branch level

4. In **Business Configuration > Branches**, configure the settings on branch level. On this level, you can for example configure
  - If the Add Customer information button is available on the visit card.
  - which views are be available (e.g. Counter Pool, Staff Pool, Queues)
  - transfer options
  - if the park button is available and if parked visits are to be sent to the user pool or the counter pool
  - if the Finish button is hidden (if hidden, Call next or Close counter have to be used for finishing the visit)
  - if the feature of showing and adding notes is available
  - if customer language is shown in the queue view and in the visit card. You can also configure if it is possible to edit the language in the visit card.
  - if customer language is shown in the queue view (with full language name or just a language icon in column where you need to hover to see language)
  - walk times on queues, and more.

5. Save and publish each branch.

After completing these steps, you can log in and use Counter.

## 2.4.5 Map users to branch, service point and work profile

Normally, when users open Counter, they have to select user profile settings every time. There is however an option to map users to a branch, a service point and a work profile so that they don't have to select this when logging in. Mapping of users is done in General Admin.

For more information about user mapping, see the User Mapping section in the General Admin guide.

## 2.4.6 Enabling and using Marks

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

Marks are displayed on the Visit information card. See "3.5.1 Visit information" on page 20

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

### Enable Marks in Counter

1. Open the UTT settings for the relevant unit type in your equipment profile.
2. Select the **Enable marks** checkbox.
3. (Optional) In the Mark Type field, select one or more specific mark types to make available. When used, only the specified mark types will appear in Counter, even if others are configured in Business Configuration.

### Behavior across applications

- Enabled in Concierge only: Marks selected in Concierge are shown in Counter but are read-only (disabled).
- Enabled in both Concierge and Counter: Marks selected in Concierge appear in Counter as added marks and can be edited.
- Enabled in both, but with different Mark Types:
  - If a mark type is enabled in Concierge but not in Counter, marks of that type can still be deleted in Counter but will not appear in the Counter dropdown list.
  - This means such marks can be removed but not re-added in Counter.

❗ Try to keep Marks usage in the Concierge and Counter applications synchronized to avoid configuration inconsistencies.

# 3. Using Counter

## Topics in this chapter

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| Register a customer without a ticket..... | 27 |
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## 3.1 Introduction

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

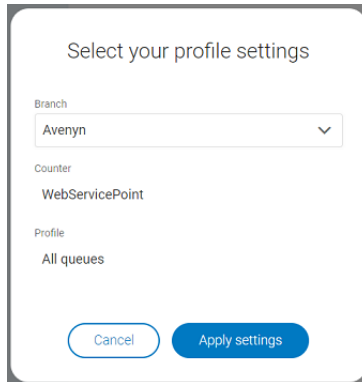
Counter is an easy-to-use browser application for calling and serving customers. With Counter, you can:

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

ⓘ The configuration for your system may differ from the one presented in this guide.

## 3.2 Getting started with Counter

When opening Counter, you may need to select branch, the service point and a work profile. Click **Apply settings**.



Select your profile settings

Branch  
Avenyn

Counter  
WebServicePoint

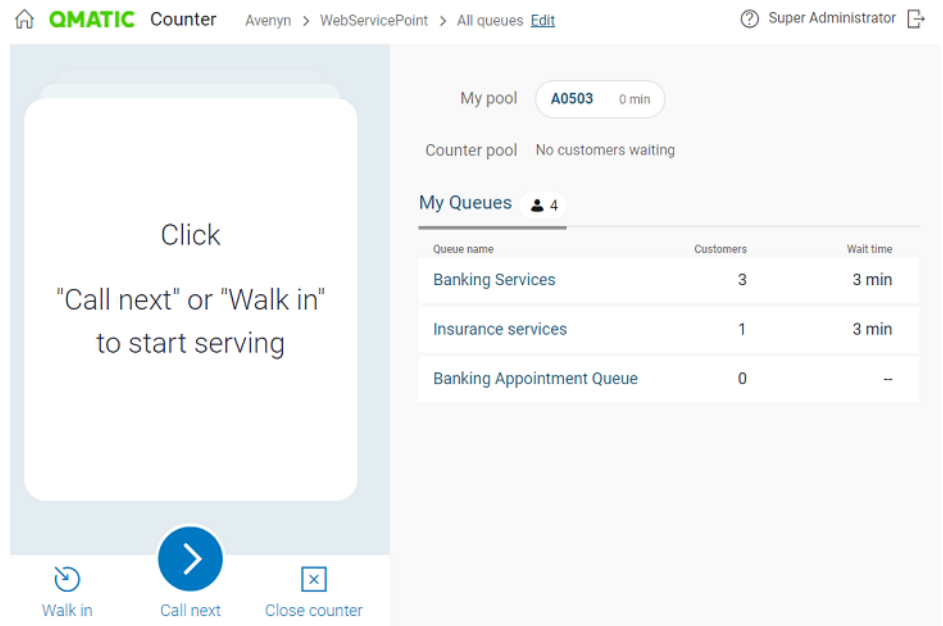
Profile  
All queues

Cancel Apply settings

⚠ It is strongly recommended that you are *not* logged in to the same counter from two different browsers at the same time.

If you need to change these settings while working, click **Edit** in the top bar.

You can now start calling customers and manage visits.



Qmatic Counter Avenyn > WebServicePoint > All queues Edit Super Administrator

My pool A0503 0 min

Counter pool No customers waiting

My Queues 4

| Queue name                | Customers | Wait time |
|---------------------------|-----------|-----------|
| Banking Services          | 3         | 3 min     |
| Insurance services        | 1         | 3 min     |
| Banking Appointment Queue | 0         | --        |

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

Walk in Call next Close counter

- To log out, click **Log out** in the top right corner.
- To go back to the Orchestra start page, click **Home**.
- To open the accessibility statement, click **Accessibility statement** in the bottom right corner.

## 3.3 Queue and visit information

My pool: A004 < 1 min, A0504 0 min

Counter pool: A005 < 1 min

My Queues 3

Find ticket (eg, A001)

| Queue name ^              | Customers | Wait time |
|---------------------------|-----------|-----------|
| Insurance services        | 2         | 5 min     |
| Banking Services          | 1         | 1 min     |
| Banking Appointment Queue | 0         | --        |

In the right area of your working space, you can see queue and visit information. Depending on how your system is configured, you can toggle between My Queues and All Queues. If there is only one queue in your work profile, all visits in that queue are shown by default.

At the top, you can find the visits that have been transferred to your staff pool as well as the counter pool. Click on a visit to get the option to call, transfer or remove the visit. Which options you have depend on what your organization allows.

To search for a visit, enter the full ticket number in the **Find ticket** search field and press **Enter**.

### 3.3.1 Queue information

In the list of queues, you find the following information:

- Queue name
- Customers – number of customers waiting
- Overdue – this value is displayed for appointment queues and shows the most overdue appointment, i.e. the longest time between appointment start time and current time.
- Wait time – the waiting time displayed here shows the waiting time of the first visit in the queue and not the longest wait time of all visits in the queue. You will also get an indication if the waiting time is close to the service level (orange icon), or has passed the service level (red icon).

To sort the list, click on the column titles.

### 3.3.2 Visit information

Click on a queue to expand it.

| < BANKING SERVICES  6 |               |                                                                                   |                      |                  |                                                                                          |
|--------------------------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------|----------------------|------------------|------------------------------------------------------------------------------------------|
| Ticket                                                                                                 | Customer name | Language                                                                          | Service name         | Appointment time | Wait time                                                                                |
| A001                                                                                                   | Sophie Rossi  |  | Apply for a loan     |                  |  38 min |
|  Notes                |               |                                                                                   |                      |                  |                                                                                          |
| A002                                                                                                   | Anna Anderson |                                                                                   | Apply for a loan     |                  |  40 min |
| A003                                                                                                   |               |                                                                                   | Apply for a loan     |                  |  42 min |
| A004                                                                                                   |               |                                                                                   | Apply for a loan     |                  |  42 min |
| A005                                                                                                   |               |                                                                                   | Open savings account |                  |  41 min |
|  Uses sign language   |               |                                                                                   |                      |                  |                                                                                          |
| A1168                                                                                                  | David Silva   |                                                                                   | Apply for a loan     | 10:05            |  35 min |

You can see the following information per visit (depending on the settings):

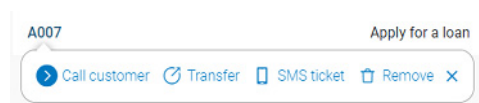
- Ticket number
- Customer name
- Service. If there is more than one service, hover over the tags icon  Additional services to see all services.
- Appointment time (if the visit is an appointment)
- Overdue time. This columns shows the time that has passed since the appointment start time, if the visit is in an appointment queue. If there is no value here, it means that the appointment start time is not passed yet.
- Wait time + indication if the waiting time is close to service level  or has passed the service level .
- Notes. You may need to hover over the notes icon  to see the full note.
- Customer language. You may need to hover over the language icon to see the full language name.
- Custom info

---

### 3.3.3 Actions

By clicking on a visit, it is possible to do the following:

- Call the customer (if cherry-picking is allowed)
- Transfer the visit. See also “3.5.2 Transfer visit” on page 21
- Send a link to a virtual ticket. See also “3.5.7 Send link to virtual ticket” on page 24.
- Remove the visit.



### 3.3.4 About 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, and one staff pool connected to each counter staff user.

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 if they are connected to a work profile. Note that customers in a pool do not have a certain order, which is what differs it from a queue.

Depending on the configuration, visits in pools can be called, transferred and removed.

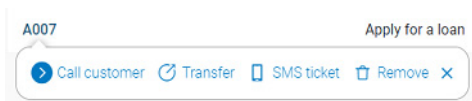
## 3.4 Call a customer

There are two ways to call a customer for service:

- Click **Call next**. This calls the next customer according to your work profile.

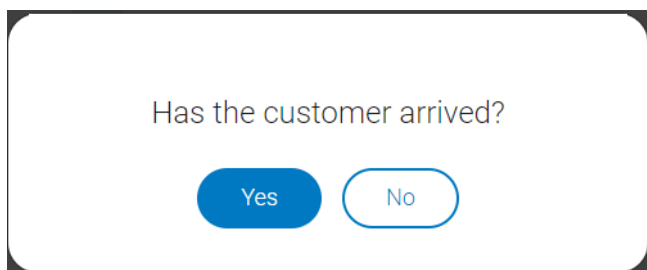


- Find a visit either in a queue or a pool and click **Call customer**. This calls the selected customer and may not be allowed in your system.



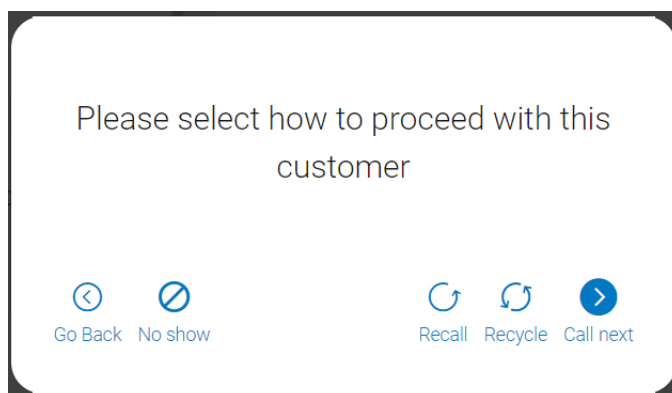
⚠ You may have something called **Store next** enabled. This means that the next customer is called automatically.

When a customer is called, the system can be set up so that you need to confirm that the customer has arrived.

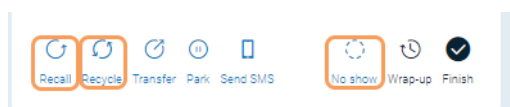


If you click **Yes**, you can proceed with working with the visit. If you click **No**, you need to select how to proceed with the customer. Here you have the following options:

- Call the customer again.
- Recycle, i.e. put the visit into the same queue after a set number of minutes.
- Call the next customer and thereby end the visit.
- Mark the customer as no show. Depending on the settings, this can either mean that the visit is removed, or that the visit is transferred to a defined queue.
- Go back to the previous dialog where you will be asked again whether or not the customer has arrived.



If you *don't* have the **Confirm needed** setting turned on, you have a few options on the visit card if the customer doesn't show up when he or she is called: **Recall**, **Recycle**, or mark as **No-show**.



- **Recall:** If a customer does not respond to the initial call for service, and you want to call the customer directly again, you can call the customer again. When calling a customer again, the call is reannounced on the displays and through the audio units available in your system.
- **Recycle:** 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 you can put that visit back into the queue at the first position.

Note that the customer cannot be called until a certain time has passed. The 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).

- **No show:** If a customer is called and does not show up even after being recalled, you can register the customer as a no-show. The system will save the visit in the statistics, allowing management to track the number of no-shows.

## 3.5 Handle the called visit

When you have called a visit, you can see detailed visit information. You can also transfer the visit, start an online meeting or send an SMS to the customer.

### 3.5.1 Visit information

The screenshot shows a visit information card with the following elements:

- 1.** Customer name: Audrey Connor
- 2.** Ticket number: A0501
- 3.** Insurance
- 4.** Add service to visit (plus icon)
- 5.** Appointment: 14:10
- 6.** Overdue: 7 min
- 7.** Waiting time: 00:01:15
- 8.** Total Transaction time: 00:36:09
- 9.** Add notes (plus icon)

Below the card are three buttons: Walk in, Call next, and Close counter.

The visit card contains the following information:

1. Customer name and a plus sign if there are several customers linked to the visit.
2. Ticket number, for example A001.
3. Name of the service that is currently provided to the customer. You can also see any other services connected to the visit.
4. Context marketing messages.
5. Appointment – booked appointment time.
6. Overdue – time from appointment start time until the customer was called.
7. Waiting time – the time the customer has waited for this service.
8. Total transaction time – the time spent serving this customer. Your system may also be configured to show the expected transaction time in parenthesis. With multi-service visits, you can also see the transaction time for the currently served service
9. Notes. You can also edit and add notes here. The maximum number of characters for a note is 255. All notes are deleted when the visit is closed.

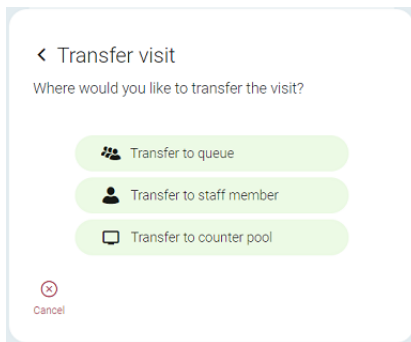
- 
10. Custom information shown as Info 1, Info 2 etc (not shown in image). This is additional information that your organization needs to be able to provide a service. Depending on the settings, it may also be possible to edit the information by clicking in the field.
  11. Customer language (not shown in image). This is displayed below the customer name. Depending on the settings, you may be able to change the language by clicking on it.
  12. Configurable button (e.g. "Customer details") for opening an external URL (not shown in image).

ⓘ For the automatic redirect to work, users must allow pop-ups and redirects for the site running the Counter application in their browser settings. If pop-ups are blocked, the Custom URL will not open automatically, and no error message will be shown.

13. Marks (not shown in image). Predefined labels that can be added to the visit to capture additional details, such as appointment type, customer group, or service category.
14. Custom time field (not shown in image). Displays a time entered for the visit in Concierge, such as a scheduled start or follow-up time. Shown as Added time on the Visit Card. The time cannot be edited in Counter.

### 3.5.2 Transfer visit

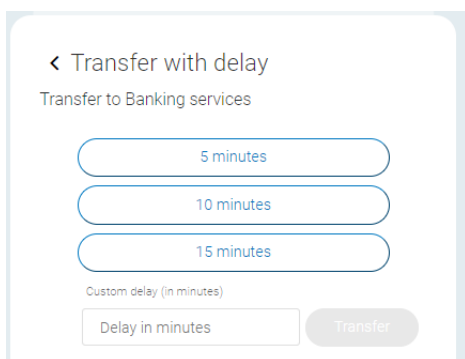
On the visit card, click **Transfer**  to move the visit to another queue, staff member or counter.



- When transferring to a staff member or a counter, the visit will end up in their pool.
- When transferring to a queue, select if you want to transfer the visit:
  - First in line 

- Last in line 
- Based on visit lifetime  (sorted)
- With a delay .

If you select **Transfer with delay**, the visit will be visible in the selected queue or pool after a chosen number of minutes. You can either select one of the default options presented, or enter any number of minutes in the input field:



### One-click transfer

It is also possible to do a quick transfer by clicking the transfer icon in the queue list. The current visit will then be placed in the selected queue based on waiting time.

| My Queues  0 |                  |           |
|-------------------------------------------------------------------------------------------------|------------------|-----------|
| Action                                                                                          | Queue name       | Customers |
|              | Banking Services | 0         |

You can only do a one-click transfer to non-appointment queues.

### 3.5.3 Park visit

On the visit card, click **Park**  to park the visit and send it to your pool. This can be either your user pool or your counter pool, depending on the settings. You can then select it from there whenever you want to resume serving the customer.

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### 3.5.4 Add service to visit

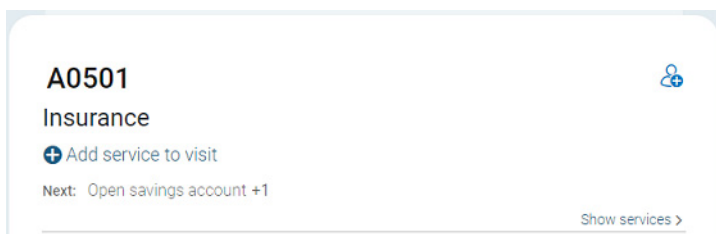
Depending on how your system is set up, it may be possible to add services to an ongoing visit, turning it into a multi-service visit.

1. Click **Add service** .
2. Select a service from the drop-down list. Any other unserved services will be listed and it is also possible to delete them from the list.
3. Click **Done**.

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

### 3.5.5 Serve multiple services

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.

### 3.5.6 Add customer information to visit

If you add customer information after the customer has been called, it will be visible to any staff member who serve the same customer later during the visit.

Click **Add customer**  to add customer information. You can then do any of the following:

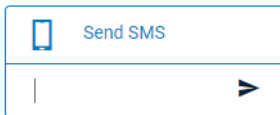
- Search for an existing customer to add it to the visit
- Add a new customer by filling out the form with name, email, address, phone number etc.

Once customer information is added, you can always edit it by clicking on the customer name on the visit card.

### 3.5.7 Send link to virtual ticket

If the customer has taken a paper ticket but want to be able to follow their queue position online, it's possible to send a link to a virtual ticket to the customer. This feature may not be enabled in your system.

To send an SMS to an ongoing ticket, click **Send SMS**  on the visit card. Enter the customer's phone number and click **Send**. The customer will receive an SMS with a link to Mobile Ticket.

A screenshot of the 'Send SMS' interface. It consists of a rectangular box with a blue border. The top half of the box has a light blue background and contains a small blue mobile phone icon on the left and the text 'Send SMS' in blue. The bottom half of the box has a white background and contains a vertical line on the left and a blue right-pointing arrow on the right.

Just like with other notifications, you cannot decide the content of the SMS here. Instead, the content is predefined in the notification settings.

You can also send an SMS to 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**.

### 3.5.8 Start online meeting

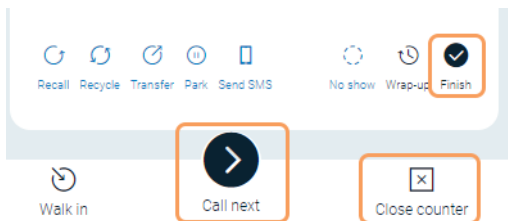
To start an online meeting with a remote customer, click **Start meeting**.

---

## 3.6 Finish visit

A visit can be finished in one of the following ways from the visit card:

- Click **Call next**. This will finish the current visit and call the next customer.
- Click **Finish**. This will finish the visit without calling the next customer. The counter will remain open.
- Click **Close counter**. This will finish the visit and close the counter.



⚠ If there are additional services connected to the visit, the visit will continue. Instead, it's the current visit transaction that is finished.

### 3.6.1 Register delivered services and outcomes

Some services require that you register a delivered service and/or an outcome. You cannot finish the visit and call the next customer until this has been done.

A delivered service is typically a more specific definition of the service that the customer initially chose. An outcome is the result, for example if a loan application was approved or denied.

1. On the visit card, click **Add a delivered service** .
2. Select a delivered service.
3. If required, also select an outcome.
4. Click **Done**.

In some systems it is also possible to register an outcome without adding a delivered service first.

### 3.6.2 Register marks

For some services, it can be optional or required to register marks. If marks are required, you cannot finish the visit and call the next customer until you have registered a mark.

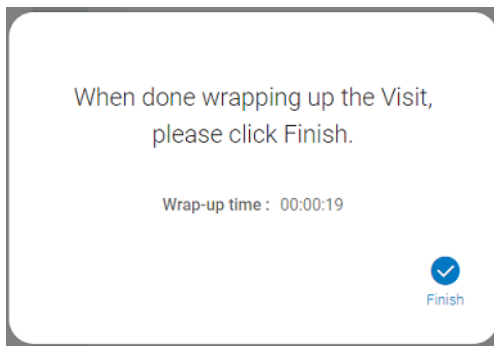
1. On the visit card, click **Add a mark** .
2. Select the wanted mark type.

3. Select a mark and the number of marks to add (max 10). Click Add marks to visit.
4. Click **Done**.

### 3.6.3 Wrap 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. The wrap-up time is captured in statistics which makes it possible to track the actual time spent serving the customer.

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



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## 3.7 Register a customer without a ticket

A typical scenario to use the **Walk in** feature (also called **Walk direct**) is when no one is waiting in line and a customer goes to a counter without first taking a ticket.

A customer without a ticket can be registered as a Walk direct. The ticket is called immediately following the selection of the service.

To register a customer without a ticket:

1. Click **Walk in** .
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. No ticket is printed for walk direct visits.  
  
 If your system is configured so that a default Walk direct service is set, this page is bypassed and a visit with the default service will automatically be started instead.
3. You may also have the option to change the notification language for the walk-in visit. This can be useful for example if the visit is to be transferred and kept in the system. The language set as default for your system is preselected. To set another language, click on the language on the visit card and select a language from the list.
4. Once the visit is created, handle this visit in the same way as you would with any other visit.

## 3.8 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.

### 3.8.1 Tabbing and shortcuts

- You can use the tab key  to move between different objects. Use **tab** to move to the next object and **shift+tab** to move to the previous object.
- Use the arrow keys to move between different list items within an object.

### 3.8.2 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.

### 3.8.3 Accessibility statement

In the bottom right corner, there is a link to the accessibility statement.

# 4. Appendix – Setup details

Topics in this chapter

Custom URL integration with visit and user data .  
30

## 4.1 Custom URL integration with visit and user data

The Custom URL feature allows you to define a URL template that dynamically includes data from the active visit and/or the current user status. The resulting URL can be configured to automatically in a new browser tab when a visit is called. This feature enables seamless integration with external systems—such as CRM or case management platforms—by passing relevant context-specific data in real time.

The URL is created at runtime using placeholders enclosed in curly braces (e.g., {ticketId}, {custom2}, {servicePointName}). These placeholders are replaced with values from the user status object. The URL opens automatically with a short delay when the visit is called. Additionally, users can open the same URL manually at any time by clicking a button in the visit information card.

### *To enable a custom URL*

1. Go to **Business Configuration > Operation Profiles > Manage equipment profile**.
2. For the relevant equipment profile (service point), locate the **Custom URL** setting.
3. Enter a template string as the URL. For example:  

```
https://example.com/  
profile?ticket={ticketId}&id={custom2&agent={servicePointName}}
```
4. (Optional): Check the checkbox **Open URL Automatically on Call Next** if you want the custom URL to automatically open in a new browser tab.
5. Save the changes.

ⓘ For the automatic redirect to work, users must allow pop-ups and redirects for the site running the Counter application in their browser settings.

If pop-ups are blocked, the Custom URL will not open automatically, and no error message will be shown.

### **URL syntax**

- The base must be a valid URL.
- You can include multiple query parameters, separated by &.
- Use curly braces {} to define placeholders that map to values in the User status object.
- Parameter names (e.g., ticket, id, agent) can be freely chosen, but the placeholder values (e.g., {ticketId},

---

`{custom2},{servicePointName})` must match the keys in the visit or user status object exactly.

- If a placeholder cannot be resolved, its value will be empty.

### ***Where placeholder values come from***

Placeholders in the template are replaced at runtime using values from the following source:

- User status object – e.g., `{servicePointName}`, `{userState}`, `{branchId}`, `{ticketId}`, `{custom2}`, `{waitingTime}`

When accessing nested values (e.g., in `parameterMap`), use flat notation like `{custom2}` rather than `{parameterMap.custom2}`. Keys from `parameterMap` are merged into the top-level namespace for placeholder resolution.

### ***What happens when a visit is called?***

- If the setting **Open URL Automatically on Call** next is checked:
  - All placeholders are resolved using values from the current visit and user status.
  - The resulting URL is opened in a new browser tab after a 0.5-second delay.

### ***Manual access via button***

When a Custom URL is configured, a button is added to the visit information card in the Counter interface. This allows the user to open the URL manually at any time during the visit.

- The button label is configurable via the translation key `button.custom.url`.
- The default text is “Customer details”.

### ***Example***

Given this URL template:

```
https://example.com/
profile?ticket={ticketId}&id={custom2}&agent={servicePointName}
```

Resolved data

```
{
  "ticketId": "A017",
  "parameterMap": {
    "custom2": "value2"
  }
  "servicePointName": "WebServicePoint"
}
```

The final URL will be:

`https://example.com/  
profile?ticket=A017&id=value2&agent=WebServicePoint`

If custom2 is not present in the User status object:

`https://example.com/  
profile?ticket=A017&id=&agent=WebServicePoint`

### ***User status object example***

Here is a comprehensive example showing all the available parameters in a User status object:

```
{  
  "id": "<visit_id>",  
  "checksum": "<checksum>",  
  "ticketId": "<ticket_id>",  
  "unservedVisitServices": [],  
  "currentVisitService": {  
    "id": "<service_id>",  
    "eventTime": "<event_time>",  
    "serviceId": "<service_id>",  
    "serviceInternalName": "<internal_name>",  
    "serviceExternalName": "<external_name>",  
    "visitDeliveredServices": [],  
    "visitOutcome": null,  
    "outcomeExists": false,  
    "deliveredServiceExists": false,  
    "primaryResource": null,  
    "secondaryResources": null  
  },  
  "servedVisitServices": [],  
  "visitMarks": [],  
  "customerIds": [],  
  "waitingTime": "<waiting_time>",  
  "totalWaitingTime": "<total_waiting_time>",  
  "timeSinceCalled": "<time_since_called>",  
  "recycleAllowed": false,  
  "noshowAllowed": false,  
  "recallAllowed": false,  
  "delayed": false,  
  "delayExpirySeconds": 0,  
  "parameterMap": {  
    "firstQueueEnterTime": "<queue_enter_time>",  
    "enterQueueTime": "<enter_queue_time>",  
    "branchName": "<branch_name>",  
    "lang": "<language>",  
    "startQueueOrigId": "<queue_origin_id>"  
  },  
  "appointmentId": null,  
}
```

---

```

        "appointmentTime": null,
        "branchCurrentTime": "<branch_current_time>",
        "timeSinceCurrentServiceCalled": "<time_since_service_-
called>"
    }
}
{
    "branchId": 8,
    "userState": "SERVING",
    "visitState": "OK",
    "servicePointId": 6,
    "servicePointName": "WebServicePoint",
    "servicePointState": "OPEN",
    "visit": {
        "id": 105,
        "checksum": "1519165121",
        "ticketId": "A1113",
        "unservedVisitServices": [],
        "currentVisitService": {
            "id": 213,
            "eventTime": "22:37",
            "serviceId": 4,
            "serviceInternalName": "Service 1",
            "serviceExternalName": "Service 1",
            "visitDeliveredServices": [],
            "visitOutcome": null,
            "outcomeExists": false,
            "deliveredServiceExists": false,
            "primaryResource": null,
            "secondaryResources": null
        },
        "servedVisitServices": [],
        "visitMarks": [],
        "customerIds": [],
        "waitingTime": 0,
        "totalWaitingTime": 0,
        "timeSinceCalled": 7,
        "recycleAllowed": false,
        "noshowAllowed": false,
        "recallAllowed": false,
        "delayed": false,
        "delayExpirySeconds": 0,
        "parameterMap": {
            "firstQueueEnterTime": "2025-06-
09T22:37:24.309+1200",
            "enterQueueTime": "2025-06-09T22:37:24.309+1200",
            "branchName": "Auckland",
            "lang": "gb",

```

```
        "startQueueOrigId": 10
    },
    "appointmentId": null,
    "appointmentTime": null,
    "branchCurrentTime": "22:37:32",
    "timeSinceCurrentServiceCalled": 7
},
"workProfileId": 1,
"workProfileName": "All queues",
"servicePointDeviceTypes": [
    "SW_SERVICE_POINT"
]
}
```



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