QMATIC

Manual

Department Reception

256.01E

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1. What’s new

Version	Chapter	Change
01.A	• General	• Manual for Department Reception created
01.B	• Department Reception Settings	• Settings for visibility and order of columns in the appointment list added • Settings for custom visit fields added • Settings for custom ticket number added • Setting to make it mandatory to add customer to visit added.
	• Using Department Reception	• Possibility to change order of appointment list columns added • Description of printing functionality updated.
01.C	• Department Reception Settings • Using Department Reception	• Booking functionality added
01.D (Version 1.4.0)	• Department Reception Settings • Using Department Reception	• Reprint ticket functionality added • Option to hide appointments older than a certain time added

Version	Chapter	Change
01.E	• Department Reception Settings • Using Department Reception	• Clarification of the Counting setting. • Added section about counting customer without creating a ticket.

2. Installation

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2.1 Overview

This guide presents the installation procedure and standard features of the Department Reception Application.

Department Reception is a staff application, which combines different reception tasks. The following functionality is included:

- Create single-service or multi-service visits
- See and check in upcoming appointments
- See the waiting time and number of waiting customers per queue
- Create and edit customers
- Book appointments

Department Reception can be used in a multi-department environment.

2.2 Installation

If you install Department Reception from Xtend, please proceed to step 6.

1. Copy department-reception.war to <*Orchestra_install_dir*>\system\custdeploy.
2. Add the file departmentReceptionMessages.properties to <*Orchestra_install_dir*>\system\conf\lang.
3. Add the content from the file commonMessages.properties in the Department Reception 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 Department Reception need to be assigned to a role with the following access modules:

- Appointments
- EntryPoint Connector
- ServicePoint Connector
- Department Reception
- Department Reception Settings (for administrators)

3. Department Reception settings

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3.1 Introduction

This chapter describes the settings you can configure for Department Reception.

3.2 Global

Reception

- **Enable Reception** - Enable or disable the Reception functionality
  - **Enable Queue Overview** - Enable or disable showing the queue overview
  - **Enable Customer Selection** - Enable or disable the possibility to select a customer when creating a visit
  - **Enable Mandatory Customer Selection** - Enable or disable having the customer selection mandatory when creating a visit. This is useful for example if you use customer name instead of ticket number (See “3.11 Custom ticket number” on page 10).
  - **Enable Search Visit** - Enable or disable the possibility to search for a ticket in Reception.
  - **Enable Reprint Ticket** - Enable or disable the possibility to reprint a ticket.
  - **Enable Queue Transfer** - Enable or disable the possibility to transfer visits to a queue.
  - **Enable Userpool Transfer** - Enable or disable the possibility to transfer visits to a user pool.
  - **Enable Counterpool Transfer** - Enable or disable the possibility to transfer visits to a counter pool.

Appointment Arrival

- **Enable Appointment Arrival** - Enable or disable the appointment arrival functionality.

Booking

- **Enable Booking** - Enable or disable the booking functionality.

3.3 Booking

- **Enable Regions Selection** - Enable or disable the possibility to select region.
- **Enable Service Groups** - Enable or disable the service group filter. If disabled, the full list of services will show.
- **Enable Notification Type** - Enable or disable the possibility to pick a notification type. If disabled, the default notification type is used in all instances.
- **Activate number of children** - Enable or disable selecting and showing the number of children for an appointment.
- **Disable saving the same service multiple times based on number of people** - By default, the system saves the service once for every person. If this option is disabled the system only saves the service once.
- **Disable Stat Events** - Check this box if you do not want the system to send appointment origin events.
- **Default notification type** - Set the default method for sending notifications.

3.4 Branch Configuration (Multidepartment)

Set up specific configuration for entry points, only used in multi-department configuration.

- Select a multi-branch / reception branch to display a list of entry points for that branch.
- Select if the branch is a standalone branch.
- For each entry point, select if you want tickets to be printed or not
- For each entry point, select the department printer Id. It is the logical Id setup in the DepartmentPrinter unit type. This allows the reception to only see the departments that have an DepartmentPrinter / Virtual printer with the same id.

3.5 Custom visit parameters

Select which custom fields from branch, calendar branch, calendar service or calendar resource should be added to the visit when arriving the appointment.

1. Click **Edit**
2. Select a parameter type - branch, calendar branch, calendar service or calendar resource
3. Select the custom visit parameters that you want to include.
4. Click **Save** to add the parameters.
5. Click **Save** for the whole settings page.

3.6 Appointment list fields

Configure the fields in the list of appointments when arriving appointments. Select which fields should be enabled and if they should be visible by default. Also, select the default order. The visibility and the order of the fields can then be customized by each staff member.

The following fields are available:

- Alert
- Status
- Time
- Duration
- Name
- Branch
- Services
- Resource (for Orchestra Calendar)
- Phone
- Email
- Dob
- Language
- Address 1
- Address 2
- Post Code
- City
- State
- Country

- Identification Number
- Customer External Id
- Title
- Last Modified
- Internal Id
- External Id
- Public Id
- Notes
- Primary Resource (for QCA)
- Secondary Resource (for QCA)

3.7 Booking Time Ranges

Set time range filters that are shown when selecting time slots in Booking. The default time ranges are Morning (AM) and Afternoon (PM).

1. Click **Add**
2. Write a display name for the time range.
3. Set the start and end time.
4. Click **Save** to add the time range.
5. Click **Save** for the whole settings page.

3.8 Customer Form

Select which fields should be included (visible) in the customer information form, and if they should be required. 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

3.9 Country Code

The settings for country code are used for the customer phone number field. Configure the following:

- Which countries to show in the country code list. If none are selected, all country codes are included.
- What should be the preselected (default) country code.
- Which country codes to show in the top of the list. Here, you should list the most frequently used country codes.
- If a flag should be shown together with the country code.

3.10 Customer Languages

Define what languages should be available when creating a customer. Click on a language to make it the default choice.

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

3.11 Custom ticket number

It is possible to print a ticket with the customer's first or last name instead of ticket number.

1. In Settings > Extra Configuration > Custom Ticket Number, check **Enable custom ticket number**.
2. Select what type of ticket number you want:
   - Last name
   - First name
   - First name + first letter of last name
   - Last 4 digits of the appointment ID
3. Click **Save** in the top of the settings page

3.12 Counting

The counting feature allows visits to be counted in the system, even if they didn't go through a queue. It is useful in situations when a customer approaches the reception, and the staff is able to help the customer directly without creating a ticket. The staff user can then manually register the visit by clicking **Count customer** in the Visit Form.

See also “4.2.3 Count visits without creating tickets” on page 18.

3.12.1 Set up the counting feature

To use the counting feature, you first need to assign a service point that can handle visits in the background.

Each branch must have a service point defined for counting to work.

1. In the Department Reception Settings, find the **Counting** section.
2. Click **+.**
3. Select a branch and a service point.
4. Click **Save**.
5. Repeat for all branches / service points.

4. Using Department Reception

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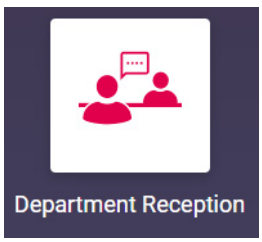
4.1 Introduction

Department Reception is a reception solution where you can create visits, see the waiting time and number of waiting customers per queue, check in upcoming appointments and create and edit customers

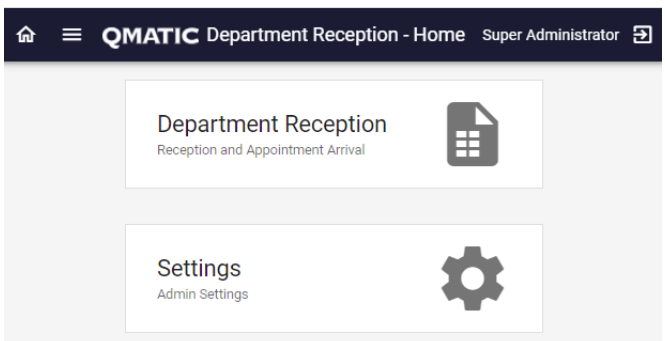
Department Reception can be used in a multi-department environment.

ⓘ Which sections and features you have access to depends on the configuration. In this guide, all standard features are presented.

To open Department Reception, click on the icon in the Orchestra home page.



You will land on the home page where you can select if you want to work in the Department Reception view or configure the settings.

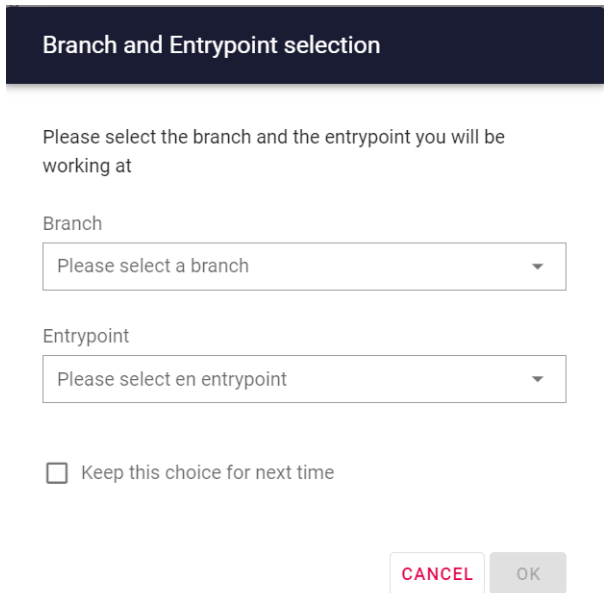


If you only have access to one part of the application (Department Reception or Settings), you will land on the view you have access to.

The first time you open the Department Reception view, you need to select a branch and an entry point.

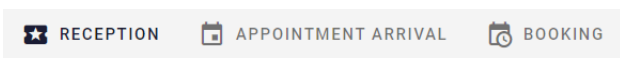
If you are working with a multi-department installation, select the Reception Branch.

To return to the Orchestra home page, click **Cancel**.



The branch and entry point you have chosen will be shown in the top bar. To change branch or entry point while working, click on the cog wheel icon in the top bar.

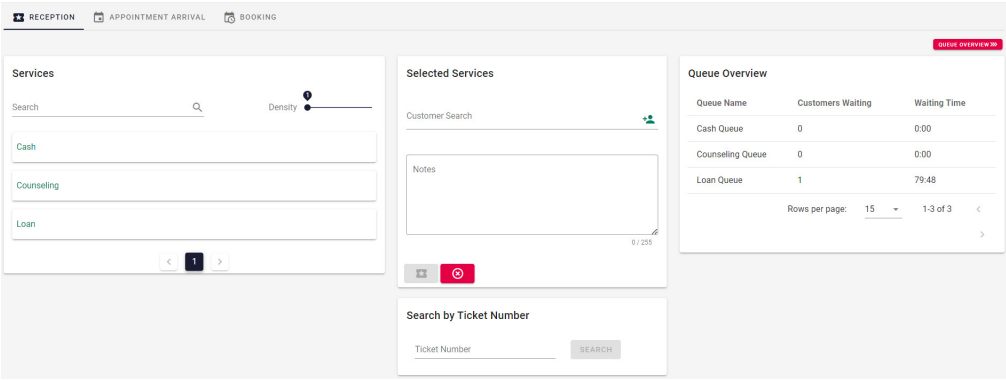
Department Reception consists of three views.



- Reception, for creating visits and see a queue overview
- Appointment arrival, for viewing and arriving appointments
- Booking, for booking appointments

The views are described in the following sections.

4.2 Reception



Reception can have up to five sections, depending on your settings:

- Department / Branch selection
- Service list
- Add customer and/or notes
- Queue overview
- Search by ticket number

4.2.1 Quick Create for visits

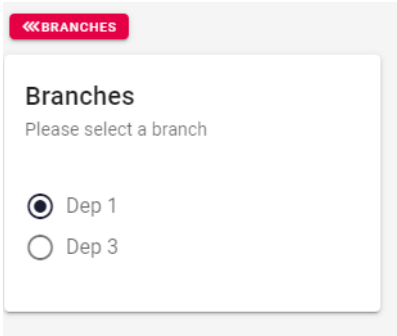
- To create a visit with just one click, click on the **Create visit** icon next to the service name in the service list.

A popup with the visit number will appear, and a ticket will be printed if there if a connected printer.

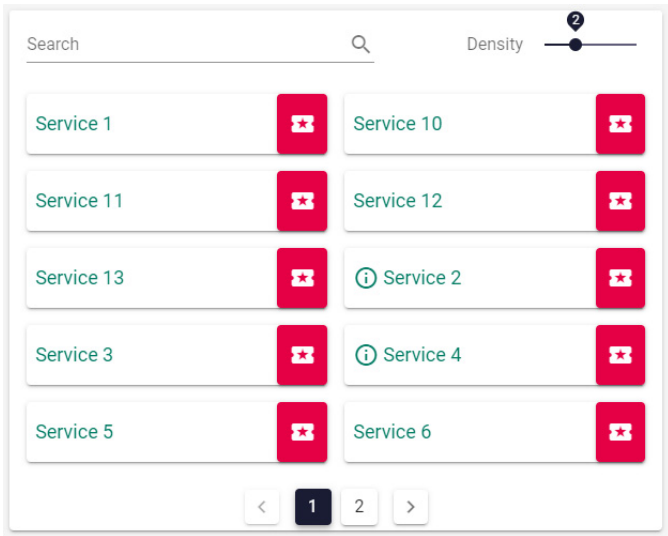
Note that this option is not available if it’s mandatory to add a customer to the visit.

4.2.2 Create a visit

1. If you work in a multi-department environment, start by selecting a branch. Otherwise, there is no need to select a branch and this section is hidden.

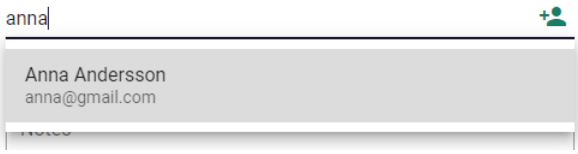


2. Select one or several services by clicking on the service name. You can also search for a service to find it quicker.



   - If there is an internal description, hover over the info icon to see more information about the service.
   - To change the number of services shown per page, use the density slider.

3. To add a customer to the visit, search for an existing customer, or click on the **Add customer** icon to create a new customer. For more information about creating a customer, see “4.2.6 Create customer” on page 21.



4. Once a customer is selected, it will appear in a list. You can also add more customers to the visit.

   - To edit a customer, click on the pencil icon.
   - To remove a customer, click on the trash can icon.
5. Optionally, add notes to the visit which will be visible when the visit is served.
6. To finalize the creation of the visit, click **Create visit** below the notes field.

   - If the current service point is configured for counting, click the **Count customer** button to register the visit for statistics purposes. For configuration details, see “3.12 Counting” on page 11.

   - To clear the form, click on the **Clear form** button.

4.2.3 Count visits without creating tickets

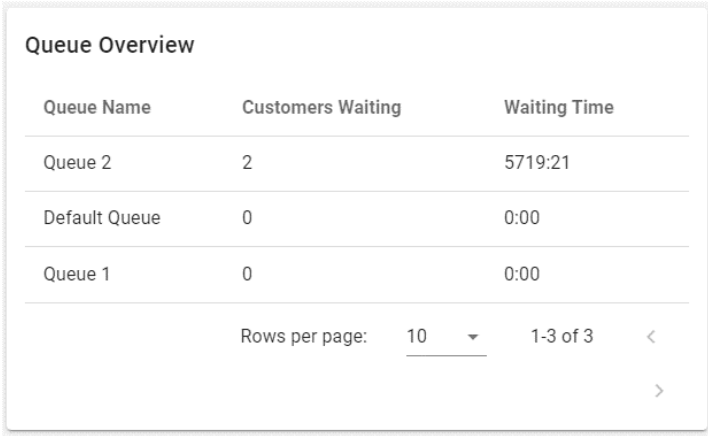
In some cases, staff is able to assist a customer directly without having to create a ticket. However, you may still want to count the visit for statistics purposes.

(!) This feature may not be available, depending on your system settings.

1. In the **Reception** tab, select a service.
2. Optional: Add a customer or notes to the visit.
3. Click **Count customer**.

4.2.4 Queue overview

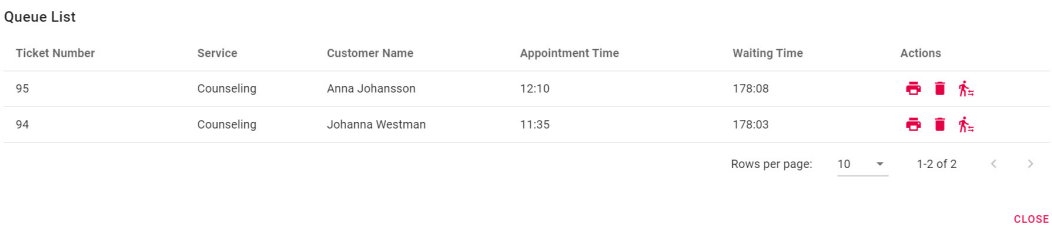
The queue overview shows the queues for the selected department / branch.



The following information is shown:

- Queue name
- Customers waiting
- Waiting time - the longest waiting time in the queue

Click on a queue to open the queue list, where you can see more information about the visits in the queue and access visit actions.



The following information is shown:

- Ticket number
- Service
- Customer / customers linked to the visit
- Appointment time if the visit is an appointment
- Waiting time

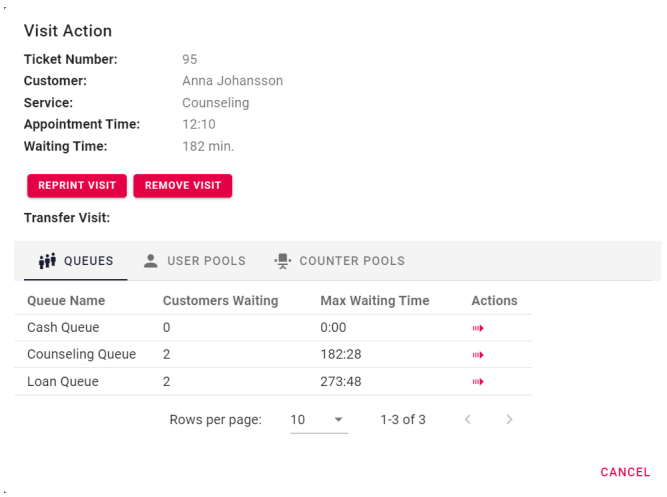
From the queue list you can also make the following actions (if enabled):

- To reprint the ticket, click .
- To delete visit, click .
- To open the visit action window, click . In the visit action window you can see information about the visit and all available visit actions.

4.2.5 Transfer visits

To transfer a visit in from a queue

1. From the queue list, click to open the visit action window.

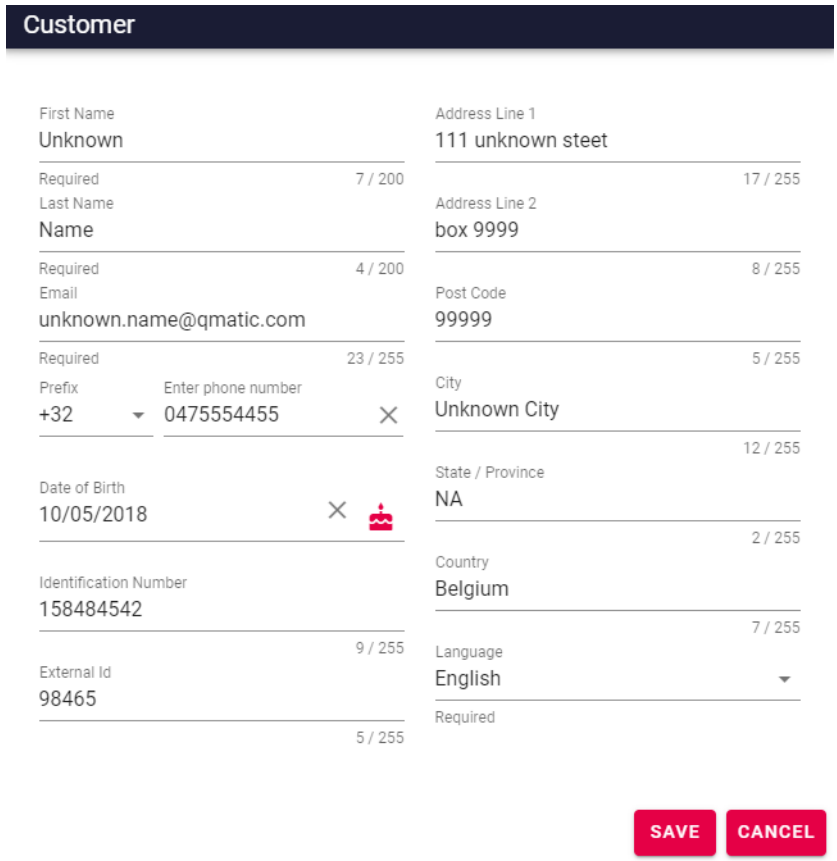


2. Select the type of transfer you want to make:
   - Queue transfer
   - User pool transfer
   - Counter pool transfer
3. Find the row for the wanted for the queue/user pool/counter pool. In the Actions column, click .

4.2.6 Create customer

When adding a customer to a visit, you can select to create a new customer

The following form is opened:



- Fill out the required and optional fields (configured in the settings) and click **Save**.

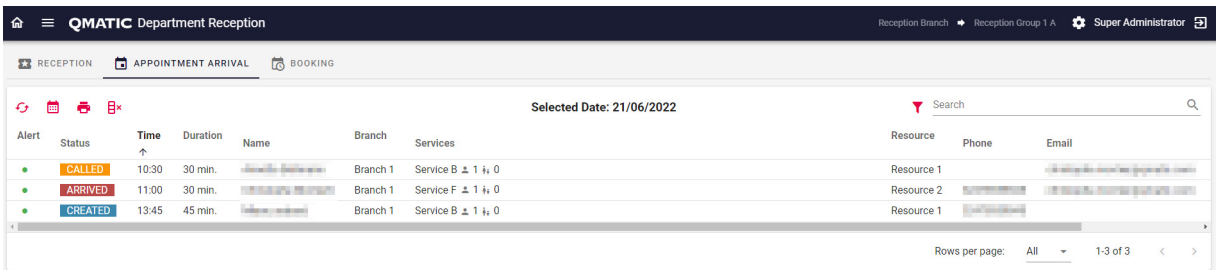
ⓘ The same form is opened when you edit a customer.

4.2.7 Search visits by ticket number

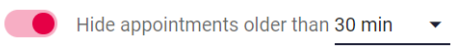
To search for a visit number, enter the visit number in the search field and click **Search**. You will see a visit action card, similar to the one in “Transfer visits” on page 20.

4.3 Appointment arrival

In Appointment arrival, you can check in the upcoming appointments for the day.



You can filter out appointments older than a certain time. To hide appointments older than a certain time, set the time threshold in the dropdown and turn on the **Hide appointments older than** toggle.



You can also sort out and find appointments by using filters or the search box. You can filter on status and on appointments 2 hours in advance. You can also search most of the columns.

In the list of appointments, the following information is shown as default:

- Alert - can be green, yellow orange or red. Yellow, orange and red means the appointment start time has passed with more than 10 minutes. Hover over the alert to see how late the appointment is.
- Time - appointment start time
- Status - can be created, arrived, called, complete, no show, ended by reset and never arrived.
- Duration - appointment duration
- Name - customer name
- Branch
- Services
- Resource
- Phone - customers phone number
- Email - customer’s email address
- Dob - customer’s date of birth
- Language

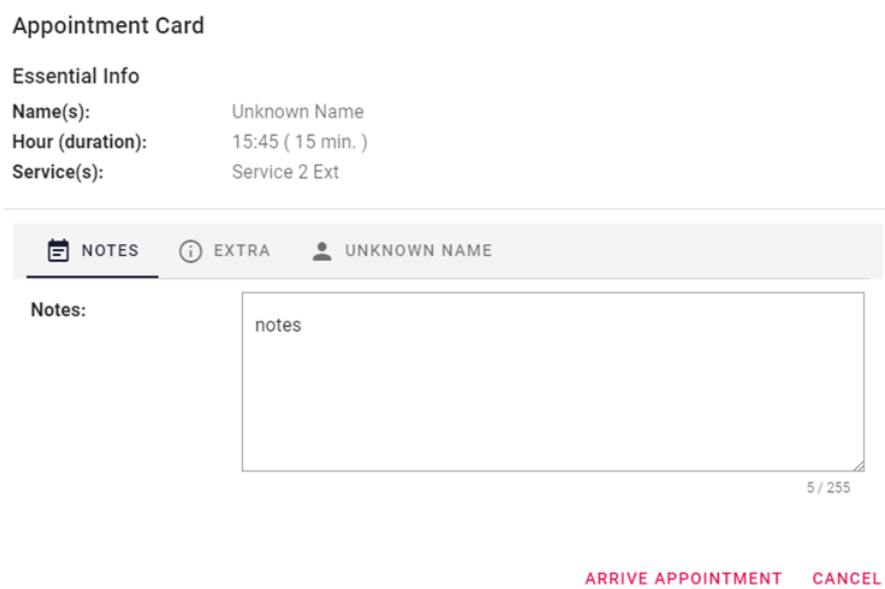
4.3.1 Toolbar

In the toolbar you have the following options:

- Refresh
- Select another date. Note that you cannot check in appointments for another day than today.
- Print the appointment list. Only the columns you have selected to be visible in the list will be printed.
- Select which columns to show. You can also change the order of the columns.

4.3.2 Check in an appointment

- To check in an appointment, click on it. Then click **Arrive appointment**.

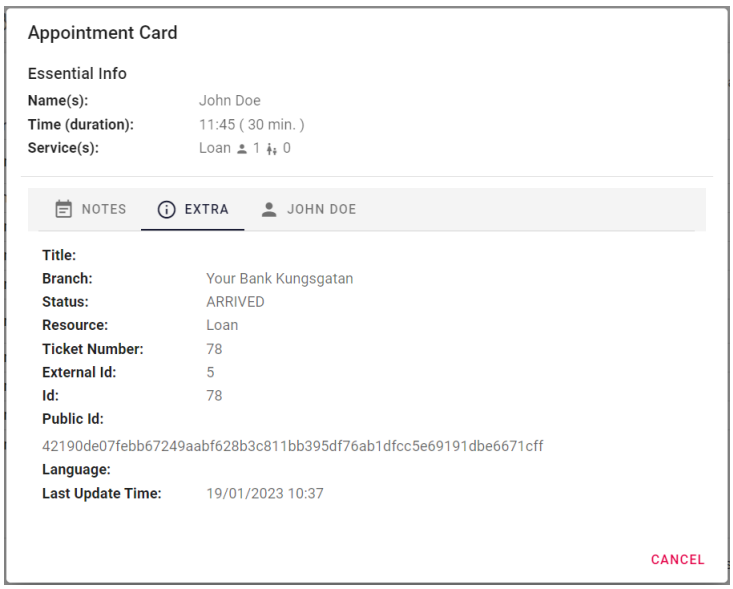


In the appointment card, customer name(s), appointment time and duration, and service(s) are shown.

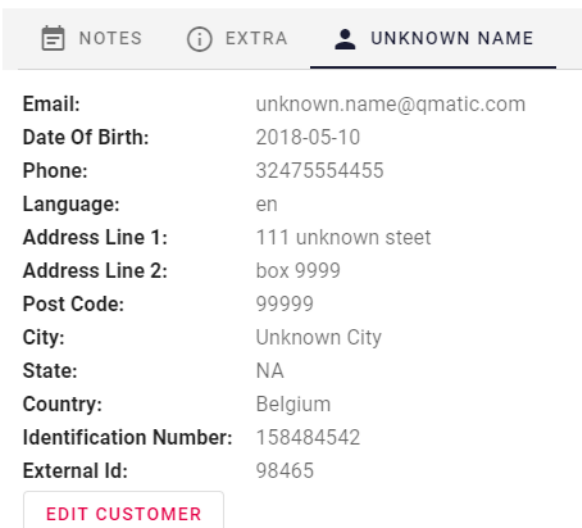
In the card, there are three tabs:

- **Notes**: View, edit or add notes

- **Extra**: See more appointment details, such as title, branch, status, resource, ticket number, external ID, ID, Public ID and last update time.

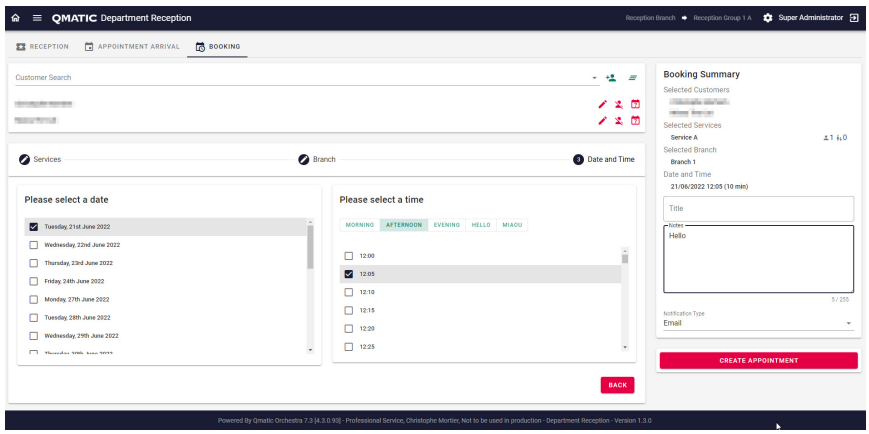


- **Customer name**: Each customer linked to the appointment has a tab where you can see the customer details. For each customer you can edit the saved information.



4.4 Booking

In Booking you can book, reschedule and cancel appointments.

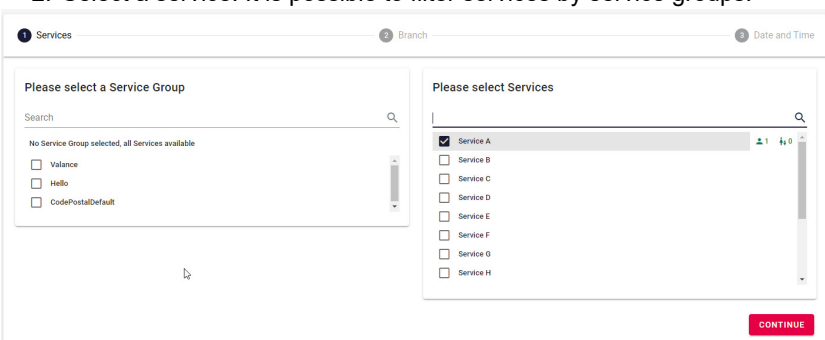


At any time, you can see what has already been selected for the booking in the Booking Summary on the right side of the screen.

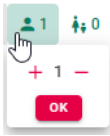
4.4.1 Create booking

To book an appointment:

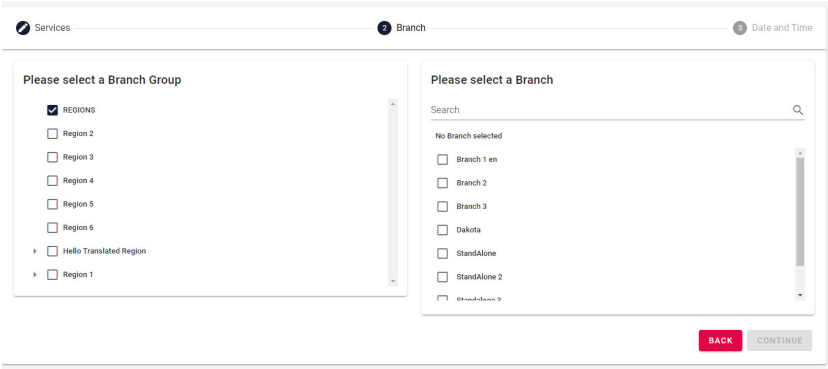
1. Select a customer. Search for a customer in the search field or create a new customer by clicking **Add customer** . It is possible to make a booking for more than one person.
   - To edit a customer, click **Edit**
   - To remove a customer, click **Remove customer**
2. Select a service. It is possible to filter services by service groups.



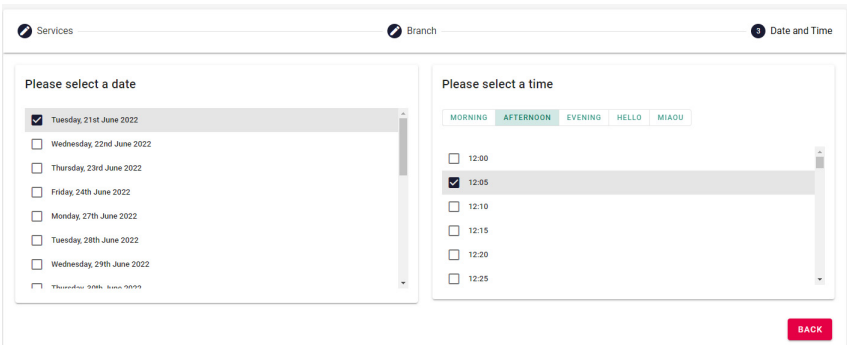
- It is possible to select multiple services for one appointment.
- You can also edit the number of adults and children (if enabled).



3. Select a branch. It is possible to filter branches by branch groups.



4. Select a date and time. It is possible to toggle only certain time intervals using the booking time ranges. To create custom booking time ranges, see “3.7 Booking Time Ranges” on page 9.



5. In the booking summary on the right side of the screen, enter the following information:
   - Title
   - Notes (optional)
   - Notification type (if enabled)
6. Click **Create Appointment**.

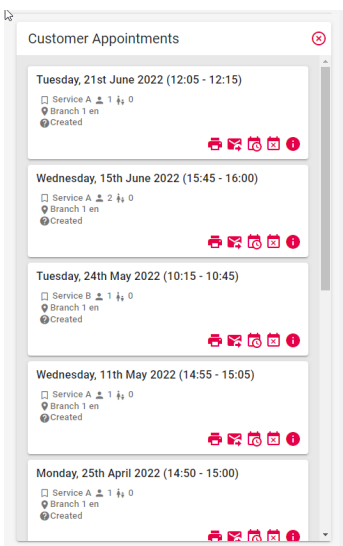
7. When you have created the appointment, a confirmation card pops up.

8. In the appointment created confirmation card, you can choose to do any of the following:

   - Click **Print confirmation** to print booking confirmation.
   - Click **Customer appointment list** to view the customer appointment list, see “Appointment list” on page 27.
   - Click **Details** to view the appointment card, similar to the appointment card in Appointment Arrival.
   - Click **Close** to close the card**.**

4.4.2 Appointment list

In Booking you can see a list of all the appointments booked for a specific customer. Click the appointment list icon to display the appointment list.



The list is sorted with the appointments furthest into the future at the top.

To open the details of an appointment in the list, click **Details** . Click the info icon to display the appointment card, similar to the appointment card in Appointment Arrival.

For upcoming appointments in the list it is possible to:

- Print confirmation - Click **Print** to print an appointment confirmation
- Resend confirmation - Click **Resend confirmation** to send a new appointment confirmation by email, by SMS, or by email and SMS.
- Reschedule appointment - Click **Reschedule** to set a new date and time for the appointment.You do not need to select the service and branch again.
- Cancel appointment - Click **Cancel**

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