

QMATIC

Manual

Notification Admin

262.01D

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1. What's new

Version	Chapter	Change
01.A	• General	• Manual for Notifications created
01.B	• General	• Updated according to new design
01.C	• Visit Notifications	• Added feature: Visit End notifications can be sent based on service or queue
01.D	• Visit notifications	• Added feature: Visit Recycle notifications — automatic messages when a visit is recycled in Counter.

2. Introduction

Topics in this chapter

Introduction 2

2.1 Introduction

Notification Admin is used to manage how and when SMS and emails are sent to customers and staff members. Changes in Notification Admin take effect immediately.

ⓘ Sometimes the customer or staff member can select a preferred notification method (“notification type”), at the time of creating a booking. Any such setting will override the default settings in Notification Admin. This can be done from e.g. Qmatic Web Booking, Appointment Booking and Concierge. So for example, if a staff member using Concierge chooses to send an appointment confirmation via SMS, but email is set in Notifications, the system will send an SMS. Therefore, you should always set up both SMS message, email subject and email message for all active appointment notifications.

2.1.1 Appointment notifications

For appointments, you can notify customers:

- when an appointment is booked
- when you want to remind them about their appointment
- when appointments are canceled
- when an appointment customer doesn't show up

2.1.2 Visit notifications

For visits, you can notify customers:

- when a visit is called
- when a visit is created
- when a visit is ended.
- when a visit reaches certain positions in the queue.
- when a visit is transferred.
- when a visit is recycled.
- A staff member can also trigger a notification manually (see Visit update).

2.1.3 Staff alerts

You can notify staff members:

- when the defined service level agreement (SLA) for waiting time or waiting customers has been reached.
- when a customer arrives to a specified queue or service.
- when appointments are booked or canceled.

-
- when a resource group is almost fully booked

3. Setup

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3.1 Setup overview

ⓘ This chapter is only for system administrators.

ⓘ Make sure that all queue agents (for which you want to set up notifications) are up and running when using Notifications. This is because it is not possible to read/write branch variables or even request the queues for a branch on a Queue Agent that is not running.

To get started, you need to:

1. Read through the section “Before you start” below.
2. Manage the settings for SMS and email.
3. If needed, change date and time format and user credentials.
4. Add languages.

3.2 Before you start

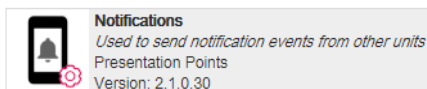
Before you start configuring Notifications, make sure you have completed the following steps:

1. To use Notifications, you need an email/sms provider. Make sure to use an email/sms provider that can handle a heavy load, where the system frequently checks for newly registered appointments.

For example (depending on the configuration), the system will check for new appointments every 5 minutes and then send out sms messages for all of the appointments that were booked during those 5 minutes, in a rapid succession.

As message provider, we recommend Messaging Services.

2. Add the **Notification unit type** to the wanted equipment profiles.



Make sure to configure the unit type correctly. Most settings are done in branch level. For example, Visit call and Visit positions are not enabled by default.

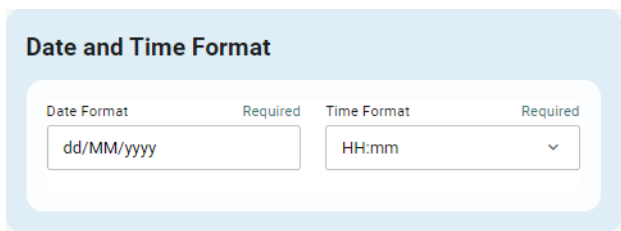
For more information about the unit type, see the Standard Unit Type's Guide.

3.3 Manage General Settings

To manage the general settings for Notifications, go to General Settings in the left menu.

3.3.1 Time and date format

- In General Settings > Date and Time format, enter the wanted formats. Save.



The screenshot shows a form titled "Date and Time Format". It contains two main sections: "Date Format" and "Time Format". Each section has a text input field and a "Required" checkbox. The "Date Format" field contains "dd/MM/yyyy" and the "Time Format" field contains "HH:mm".

Date Format	Required	Time Format	Required
dd/MM/yyyy	☐	HH:mm	☐

3.3.2 User credentials

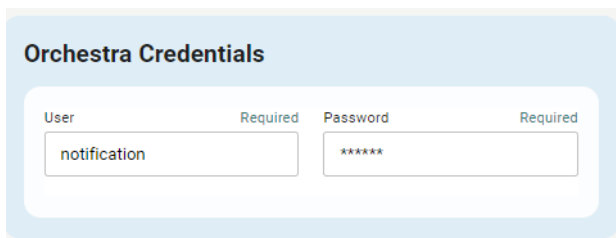
To manage user credentials, go to General Settings > Orchestra Credentials.

You need to provide the user credentials for a user that can be used to get data to the Notification module via REST calls. The user must have access to the following access modules:

- Appointment
- EntryPoint connector
- ManagementInformation connector
- ServicePoint connector
- Notification connector.

The default notification user with the NotificationRestClient role is preconfigured with the correct access modules.

When done, save.

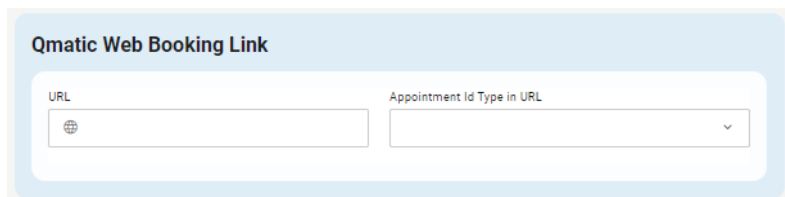


The screenshot shows a form titled "Orchestra Credentials". It contains two main sections: "User" and "Password". Each section has a text input field and a "Required" checkbox. The "User" field contains "notification" and the "Password" field contains "*****".

User	Required	Password	Required
notification	☐	*****	☐

3.3.3 Qmatic Web Booking Link

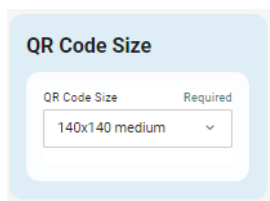
To configure the Qmatic Web Booking Link, go to General Settings > Qmatic Web Booking Link and enter a URL. Also select if the appointment ID type should be the public ID or the Booking ID.



The screenshot shows a configuration form titled "Qmatic Web Booking Link". It contains two fields: a text input labeled "URL" with a globe icon, and a dropdown menu labeled "Appointment Id Type in URL".

3.3.4 QR Code Size

In General Settings > QR Code Size, select a size for any QR codes that are sent in the notification messages. Default size is 140x140 medium.



The screenshot shows a configuration form titled "QR Code Size". It contains a dropdown menu labeled "QR Code Size" with the text "140x140 medium" and a "Required" label.

3.4 Manage SMS Settings

To manage SMS Settings, go to **SMS Settings** in the left menu.

! The SMS Settings can only be configured by the superadmin user.

SMS Settings

SMS Max Length: 320

☐ Keep the prefix (+) in phone number

Selected Gateway: Qmatic SMS

Save

Available SMS Gateways

Selected	SMS Gateway
☒	Qmatic SMS Edit
☐	SMTP Edit
☐	HTTP/HTTPS Edit
☐	SMPP Edit
☐	Oauth2 Edit
☐	Beepsend Edit
☐	Custom 1 Edit
☐	Custom 2 Edit
☐	Custom 3 Edit
☐	Custom 4 Edit

Rows per page: 10 1-10 of 12 < >

1. Set an SMS Max Length. Default is 320 characters, minimum is 120 and maximum is 1000. Consider that your SMS messages may be split into several messages, if a large number of characters is allowed.
2. To keep the prefix in phone numbers, check the **Keep the prefix (+) in phone number** checkbox.
3. Select an SMS Gateway from the **Selected Gateway** dropdown list.
4. Save.
5. For the selected SMS Gateway, click **Edit** to enter the required settings. The settings for the different SMS Gateways are described in the sections below.
6. Test the SMS configuration by clicking **Test SMS Configuration** and then entering a test phone number. The format of the phone number must be `<country code><phone number>`, for example 46123456789. If you receive a test SMS, you know that you have configured the system correctly.

! There are also Custom choices. They are however not described below.

3.4.1 Qmatic SMS

The following Qmatic SMS settings are available:

- **API-Key:** enter the API key for Qmatic SMS here.
- **From:** this is the default person/organization that will be used as sender for the SMS messages, for example Support
- **URL Shortener:** if this check box is checked, URL shortening will be enabled.

3.4.2 SMTP

Enter the following settings:

- **Sender Email Address**
- **Receiver Email Address**
- **Subject:** here it is also possible to insert fields, such as Phone Number. Select the wanted value from the drop-down list, then click Insert.
- **Email Body:** here it is also possible to insert fields, such as Phone Number. Select the wanted value from the drop-down list, then click Insert.
- **Character Set:** enter the wanted character set here, for example UTF-8.
- **Enter Host:** enter SMTP host.
- **Enter Port:** enter SMTP port.
- **User:** enter SMTP User name here. This is only needed if you select Yes in the Authenticate drop-down list, below.
- **Password:** enter SMTP Password here. This is only needed if you select Yes in the Authenticate drop-down list, below.
- **Start TTLS:** select Yes or No.
- **Authenticate:** select Yes or No.

3.4.3 HTTP/HTTPS

The following HTTP/HTTPS Settings are available:

- **Enter Host:** enter HTTP host.
- **Enter Port:** enter HTTP port.
- **Path:** enter HTTP path.
- **Authenticate:** select either None or Basic. If None is selected, it is not possible to enter anything in the User and Password fields below.
- **User:** enter HTTP User name here. This is only needed if you select Basic in the Authenticate drop-down list, below.

-
- **Password:** enter HTTP Password here. This is only needed if you select Basic in the Authenticate drop-down list, below.
 - **Method:** select between GET and POST. If you select GET, the HTTP Body field below will be disabled.
 - **HTTP Body:** enter the HTTP body of the REST request here - only applicable if you selected POST above. You can select parameters, such as Phone number, Branch Name, and Service Name from the drop-down list, then click Insert to insert them into the body.
 - **Content Type:** select between JSON, HTML, TEXT, and ENCODED.
 - **HTTP Headers:** to add HTTP headers to the REST request, click Add and enter a Name and Value for each Header. It is also possible to Delete headers here.

Do not forget to click **Save** when done.

3.4.4 Beepsend

Prerequisites

To use Beepsend as an SMS Gateway, you:

- need a Beepsend account. For a process on how to set up your Beepsend account, see Qmatic World\Subscriptions.
- need to open up outgoing traffic to Host *api.beepsend.com* and Port *80* or *443*.

ⓘ Both HTTP and HTTPS can be used.

ⓘ The Beepsend Administrator Page can be found at <https://connect.beepsend.com>.

Enter the following information:

- **API-token:** this is a long string of characters (can be both numbers and letters), which you receive from Beepsend when signing up for an account with them.
- **From:** this is the default person/organization that will be used as sender for the SMS messages, for example Support.

ⓘ The From field is limited to a maximum of 11 characters.

- **HTTPS:** if this check box is checked (default), HTTPS will be used.

Make sure that you save your settings.

3.5 Manage email settings

To manage email settings, go to **Email Settings** in the left menu.

You can have different settings for different branches. Click **Add** to create an email template for email settings. The Default template will be applied to the branches which are not included in any other settings template.

To change the email settings for a group of branches, click **Edit Settings**.

On the SMTP tab, you enter SMTP server information for sending “normal” emails to customers (Appointment Confirmation and Appointment Reminder), or staff members (alerts).

The following email settings can be modified:

- Sender Email Address
- Host
- Port
- User
- Password
- Charset
- Start TLS
- Authenticate

When done, click **Save**.

3.5.1 Test email configuration

You can test your configuration, by clicking **Test Email Configuration** and then entering a test email address.

If you receive a test email, you know that you have configured the system correctly.

3.6 Add languages

Appointment messages can be sent in different languages to support localization. To create messages in other than default language, go to **Languages** in the left menu and follow these steps:

1. Click **Add**.
2. Enter the language code (example: nl) and the language name (example: Dutch).
3. For each notification type (not staff alerts), you will find a list of Notification Email and SMS messages per language. There you can create messages for each language.

4. Visit notifications

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4.1 Overview

This section describes how to set up different types of visit notifications.

4.2 Visit Create notifications

If a phone number or email address is added to the visit, or a customer object is related to the visit, a message can be sent out to the customer when a visit is created in the system.

Visit Create

SETTINGS MESSAGES

Notification Type Required

Email and SMS Save

Branches and Queues Filter Branches

Enabled	Name	# Queues	
	Avenyn	2	
	Central Station	0	

Rows per page: 10 1-2 of 2 < >

4.2.1 Manage Visit Create notifications

1. Go to Visits > Visit Create.
2. On the Settings tab, select a notification type. The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Both Email and SMS

Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.
3. In the Branches and Queues section, you can see all branches and how many queues there are in them. Click **Edit row** to select for which queues messages should be sent.

- Go to the Messages tab and select the services you want to write a Visit Create message for. Select **All** if you want to write a message for all services. You can have different messages for different services.

Visit Create

SETTINGS MESSAGES

Messages for Service All X

Language	SMS Message	Email Subject	Email Message
English	You have been placed in line with ticket number {{ticket}}	Welcome to {{branchName}}	You have been placed in line with ticket number {{ticket}} 
French	Vous avez été placé en ligne avec le ticket numéro ...	Bienvenue à {{branchName}}	Vous avez éé placé en ligne avec le ticket numéro {{ticket}} 
Spanish	Se le ha colocado en la fila con el número de billete ...	Bienvenido a {{branchName}}	Se le ha colocado en la fila con el número de billete {{ticket}} 

Rows per page: 10 1-3 of 3 < >

- For each language, click **Edit row**  and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

4.3 Visit call notifications

If a phone number is added to the visit, or a customer object is related to the visit, you can send an SMS or email to customers when they are called.

ⓘ Note that you need to have enabled the Visit Call parameter on branch level in the Notifications unit type for this to work.

Visit Call

SETTINGS MESSAGES

Notification Type: Email and SMS Required Save

Branches and Queues Filter Branches

Enabled	Name	# Queues
✓	Avenyn	2 
✓	Central Station	2 

Rows per page: 10 1-2 of 2 < >

4.3.1 Manage visit call notifications

1. Go to Visits > Visit Call.
2. On the Settings tab, select a notification type. The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Both Email and SMS

ⓘ Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

3. In the Branches and Queues section, you can see all branches and how many queues there are in them. Click **Edit row**  to select for which queues messages should be sent.
4. Go to the Messages tab and select the services you want to write a Visit Call message for. Select **All** if you want to write a message for all services. You can have different messages for different services.

Visit Call

SETTINGS

MESSAGES

Messages for Service

All

X

▼

Language	SMS Message	Email Subject	Email Message
English	It's your turn! Please go to the assigned counter.		
French	C'est ton tour! Veuillez vous rendre au guichet désigné.		
Spanish	¡Es tu turno! Diríjase al mostrador asignado.		

Rows per page:

10

1-3 of 3

<

>

5. For each language, click **Edit row**  and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

4.4 Visit end notifications

If a phone number or email address is added to the visit, or a customer object is related to the visit, you can send a message to the customer just after the visit is ended. This could be useful for example if you want to send out a feedback survey to the customer.

4.4.1 Manage visit end notifications

1. Go to Visits > Visit End.
2. On the Settings tab, select a notification type. The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Both Email and SMS

⚠ Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

Visit End

SETTINGS MESSAGES

Notification Type Required Based On Required

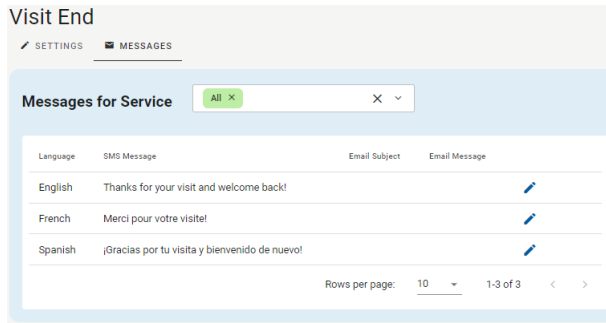
Email and SMS Service Name Save

Branches and Queues Filter Branches

Enabled	Name	# Services	Delay (min)	
✓	Avenyn	4	0	
✗	Central Station	0	0	

Rows per page: 10 1-2 of 2 < >

3. Select if the notification should be sent based on queue or service.
4. In the Branches and Queues/Services section, click **Edit row** to select for which queues or services notifications should be sent. Also set a delay in minutes for when the message should be sent after the visit is finished.
5. Go to the Messages tab and select the services you want to write a Visit End message for. Select **All** if you want to write a message for all services. You can have different messages for different services.



6. For each language, click **Edit row** and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

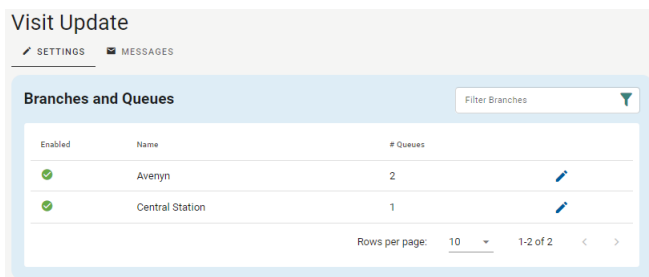
4.5 Visit update notifications

For a staff member using Counter or Concierge, it is possible to find a visit in the queue, add a phone number to the visit and trigger a notification manually. This can be used to send a link to the mobile ticket for that visit. For example if a customer has taken a paper ticket but wants a mobile ticket instead.

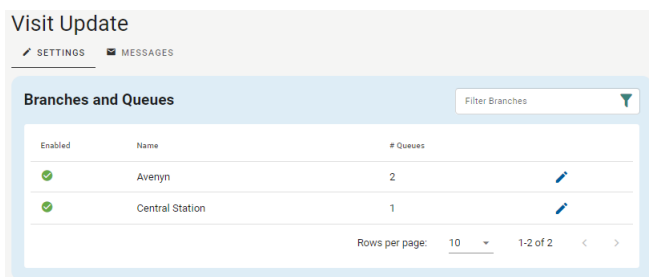
You can only send SMS messages (not email) for visit update notifications.

4.5.1 Manage visit update notifications

1. Go to Visits > Visit Update.
2. In the Branches and Queues section, you can see all branches and how many queues there are in them. Click **Edit row**  to select for which queues messages should be sent.



3. Go to the Messages tab and select the services you want to write a Visit Update message for. Select **All** if you want to write a message for all services. You can have different messages for different services.
4. For each language, click **Edit row**  and start composing the SMS message. You can add dynamic information such as branch name and ticket number in the message by inserting parameters.



4.6 Visit positions notifications

If a phone number or email address is added to the visit, or a customer object is related to the visit, you can send a message to the customer when the visit reaches certain positions in the queue.

! The queue positions are defined in the Notifications unit type.

Parameters	
Unit id	NotificationUnit
Email fields	email
Phone number fields	CUSTOMER.phoneNumber
Visit Call	☒
Position A to be notified	6
Position B to be notified	7
Enable Visit Call Events for position A	☒

4.6.1 Manage visit positions notifications

1. Go to Visits > Visit Positions.
2. On the Settings tab, select a notification type. The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Both Email and SMS

! Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

Visit Positions

SETTINGSMESSAGES POSITION AMESSAGES POSITION B

Notification TypeRequiredSMSSave

Branches and QueuesFilter Branches

Enabled	Name	# Queues	
☒	Avenyn	2	Edit row
☐	Central Station	0	Edit row

Rows per page: 101-2 of 2<>

3. In the Branches and Queues section, you can see all branches and how many queues there are in them. Click **Edit row** [Edit row](#) to select for which queues messages should be sent.

- Go to the Messages Position A tab and select the services you want to write a Visit Position message for. Select **All** if you want to write a message for all services. You can have different messages for different services.

ⓘ The queue positions are defined in the Notifications unit type.

Visit Positions

SETTINGS MESSAGES POSITION A MESSAGES POSITION B

Messages for Service All X

Language	SMS Message	Email Subject	Email Message
English	Your place in the queue is: 5		
French	Votre place dans la file d'attente est : 5		
Spanish	Tu lugar en la cola es: 5		

Rows per page: 10 1-3 of 3

- For each language, click **Edit row** and start composing the SMS and email messages. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.
- If wanted, do the same for Messages Position B.

4.7 Visit transfer notifications

If a phone number or email address is added to the visit, or a customer object is related to the visit, you can send a message to the customer when they are transferred to another queue.

4.7.1 Manage Visit Transfer notifications

1. Go to **Visits > Visit Transfer**.
2. Select a notification type. There are three types to choose from:
 - Email
 - SMS
 - Both Email and SMS

The screenshot shows the 'Visit Transfer' configuration page. At the top, there's a 'Notification Type' dropdown set to 'SMS' with a 'Save' button. Below this is a section titled 'Visit Transfer alerts for branch' with a dropdown set to 'Avenyn' and a '+' button. Underneath is a table with two columns: 'From Queue' and 'To Queue'. The first row shows 'Banking services' and 'Insurance'. To the right of the 'To Queue' column are icons for settings, email, and SMS. At the bottom right of the table area, it says 'Rows per page: 10' and '1-1 of 1' with navigation arrows.

3. Select for which branch you want to add Visit Transfer notifications.
4. Click **Add**  and select from which queue and to which queue the message should be sent. Select **All** if you want to include all queues. Save.
5. Click **Edit Messages**  and start composing the SMS and email messages for each language. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

The screenshot shows a dialog box titled 'Messages for Transfer from All to All'. It contains a table with four columns: 'Language', 'SMS Message', 'Email Subject', and 'Email Message'. There are three rows for 'English', 'French', and 'Spanish'. The 'SMS Message' column contains the text 'You have been transferred to {{queueName}}'. Each row has an edit icon (pencil) in the 'Email Message' column. At the bottom right, it says 'Rows per page: 10' and '1-3 of 3' with navigation arrows, and a 'Close' button.

4.8 Visit recycle notifications

If a customer misses being called and the staff member selects Recycle in Counter, the system can automatically send an SMS or email to inform the customer that their visit has been placed back in line.

This helps reassure the customer that they will be called again shortly, reducing uncertainty and unnecessary questions to staff.

4.8.1 Manage visit recycle notifications

1. Go to **Visits > Visit Recycle**.
2. On the **Settings** tab, select a notification type. The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Both Email and SMS

Visit Recycle

✓ SETTINGS ✕ MESSAGES

Notification Type: Required
 Email and SMS Save

Branches and Queues brig

Enabled	Name	# Queues	
	Avenyn	4	
	Central Station	0	

Rows per page: 10 1-2 of 2 < < > >

3. In the **Branches and Queues** section, you can see all branches and how many queues there are in them. Click **Edit row** to select for which queues messages should be sent.
4. Go to the **Messages** tab and select the services you want to write a Visit Recycle message for. Select All if you want to write a message for all services. You can have different messages for different services.
5. For each language, click **Edit row** and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

Example message: “You missed being called, but don’t worry — you’ve been placed back in line and will be called again shortly.”

5. Staff alerts

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5.1 Overview

The Staff Alerts tab has the following sub tabs: SLA Alerts, Arrival Alerts and Custom Alerts, Appointment Alerts and Appointment SLA Alerts. These are described below.

! The parameters Enable SLA Alerts and Enable Arrival Events has to be checked in the Notifications unit type in order for those alerts to be sent.

5.2 SLA Alerts

SLA Alerts can be used to send alerts to staff members when the number of waiting customers or the waiting time have exceeded specific levels. You can send SLA alerts for a certain queue or service point.

5.2.1 Manage SLA Alerts

1. Go to Staff Alerts > SLA Alerts

SLA Alerts

Alerts for: Avenyn

Status	Based On	Name	Type	Alert Level	Reset Level	Receiver Type	Receiver	Notification
✓		Servicepoint	Max Serving Time	10		Role	SystemAdministrator	EMAIL

Rows per page: 10 1-1 of 1

2. Select a branch and click **Add** .
3. Select if you want the alert to be based on **Queue** or **Service point**. This will determine the rest of the settings.

Manage SLA Alerts based on queue

1. If you select to send SLA alerts based on **Queue**, go through the following settings:
 - **Type:** Alert type, can be based on number of waiting customers or waiting time.
 - **Status:** Enabled: The alert is active. Disabled: The alert is inactive.
 - **Queue:** The queue for which the alert is sent.

-
- **Alert Level:** If based on waiting customers, this is the number of customers that triggers the alert. If based on waiting time, it's the waiting time in minutes.
 - **Reset Level:** The level for when the alert is reset (waiting customers/ waiting time).

For example: If you have selected waiting customers as type and you set the alert level to 10 and reset level to 5. This means an alert will be sent when there are 10 customers waiting. The alert will not be sent again until the number has decreased to 5 and then increased to 10 again.
 - **Receiver Type:** User, Role, or Manual Input. Note that for Role, users need to be assigned this role *and* have contact details registered in order to receive alerts.
 - **Role/User/Direct:** The role/user that receives this alert. For Manual Input, manually enter email addresses or phone numbers separated by comma.
 - **Notification:** The notification type. Available options are Email and SMS.
2. Decide whether or not an alert should **only** be sent to a staff member that has the selected role and is logged in at the workstation, *and* is serving the selected queue, according to his/her work profile.
 3. Enter a message and a subject (only required for email). You can add dynamic information by inserting parameters.
 4. Check the Right-to-left checkbox if the message is written in a right-to-left language, for example Arabic.
 5. Save.

Manage SLA alerts based on service point

1. If you select to send SLA alerts based on **service point**, go through the following settings:
 - **Type:** Max Serving Time
 - **Status:** Enabled: The alert is active. Disabled: The alert is inactive.
 - **Alert Level:** The serving time in minutes for when the alert is sent.
 - **Receiver Type:** User, Role, or Manual Input. Note that for Role, users need to be assigned this role *and* have contact details registered in order to receive alerts.
 - **Role/User/Direct:** The role/user that receives this alert. For Manual Input, manually enter email addresses or phone numbers separated by comma.
 - **Notification:** The notification type. Available options are Email and SMS.
2. Enter a message and a subject (only required for email). You can add dynamic information by inserting parameters.

3. If the message is written in a right-to-left language, for example Arabic, check the checkbox below the message field.
4. Save.

SLA Alerts

Based On	Required	Type	Required	Status	Required
Servicepoint		Max Serving Time		Enabled	

Alert Level	Required		
10			

Receiver Type	Required	Role	Required	Notification	Required
Role		BranchManager		Email	

Subject	Insert Parameter
SLA Alert	

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System Font
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☰ ☷ ☸
⌂ 🔍
Insert Parameter ▾

☐ Show text in RightToLeft

5.3 Arrival alerts

Arrival alerts can for example be used to send notifications to the staff when an appointment customer has arrived.

Arrival Alerts

Alerts for  

Based On	Name	On Event	Ticket Type	Receiver Type	Receiver	Notification
Queue	Banking services	Create Only	Appointment	Role	CounterUser	EMAIL  

Rows per page: 1-1 of 1 < >

5.3.1 Manage arrival alerts

1. Go to Staff Alerts > Arrival Alerts.

2. Click **Add** .

3. Modify the following settings:

- **Based On:** Alert type, can be based on queue or service.
 - **Queue/Service:** The queues/services for which the alert is sent.
 - **Ticket Type:** The type of ticket that will trigger the alert. Available options are appointments, visits, or both.
 - **Receiver Type:** Staff (Field on Appointment), Staff (Field on Ticket), Email or Phone (Field on Appointment), role, or Manual Input
-  Note that Staff (Field on Appointment), and Staff (Field on Ticket) require that you have a customized version of Qmatic Orchestra. For more information, please contact Professional Services.
- **Role/User/Direct:/Field Name:** The role/user that receives this alert. For Direct, manually enter email addresses or phone numbers separated by comma. If you selected a field as receiver type, enter the field name.
 - **Notification:** The notification type. Available options are Email and SMS.
 - **On Event:** The event that triggers the alert. Available options are Created, Transferred and Both. Note that this option only is available if you selected the alert to be based on queue.

4. Decide whether or not an alert should **only** be sent to a staff member that has the selected role and is logged in at the workstation, **and** is serving the selected queue, according to his/her work profile.

5. Enter the message and subject (only required for emails). You can add information by inserting parameters.
6. If the message is written in a right-to-left language, for example Arabic, check the checkbox below the message field.
7. Save.

Arrival Alerts

Based On	Required	Queue	Required	Ticket Type	Required
Queue		Banking services		Appointment	
Receiver Type	Required	Role	Required	Notification	Required
Role		CounterUser		Email	

On Event Required

Create Only

☐ Only send alert to staff members that have the role AND are logged on to a workstation AND are serving the selected Queue according to their selected Workprofile.

Subject

New arrival

Insert Parameter

System Font 12pt

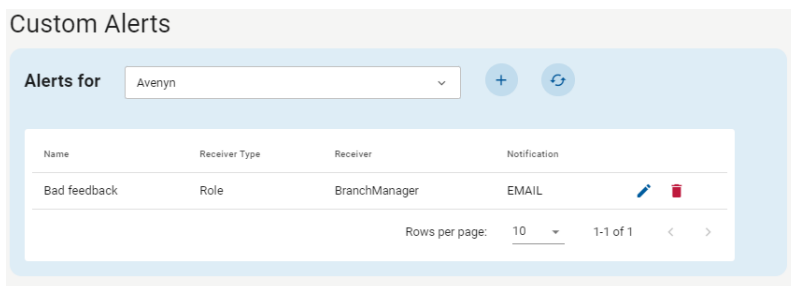
Customer {{customerFirstName}}{{customerLastName}} has arrived

☐ Show text in RightToLeft

Cancel Save

5.4 Custom alerts

Custom alerts can be used to for example send alerts every time you have received bad marks from a feedback device.



5.4.1 Manage custom alerts

1. Go to Staff Alerts > Custom Alerts.
2. Click **Add**  and go through the following settings:
 - **On Event:** The custom event name
 - **Receiver Type:** User, Role, or Manual Input. Note that for Role, users need to be assigned this role *and* have contact details registered in order to receive alerts.
 - **Role/User/Direct:** The role/user that receives this alert. For Manual Input, manually enter email addresses or phone numbers separated by comma.
 - **Notification:** Email or SMS
3. Enter the message and a subject (only required for emails). You can add information by inserting parameters. If the message is written in a right-to-left language, for example Arabic, check the checkbox below the message field.

Custom Alerts

On Event

Receiver Type Required
Role Required
Notification Required

Subject Insert Parameter

↶ ↷

B *I* U

System Font 12pt

A

Insert Parameter

Email

☐ Show text in RightToLeft

Cancel

Save

4. Save.

5.5 Staff Appointment Alerts

Staff appointment alerts can be used to notify staff members about appointments that have been booked or canceled. They can be based on a resource or a service. If a resource is corresponding to a staff member, you would send the notification based on a resource and the correct staff member would get their notification.

ⓘ Note that it's not possible to send staff appointment alerts in different languages.

Appointment Alerts

General Settings

Confirmation Check Interval: 5 (min)

Cancellation Check Interval: 5 (min)

☐ Do not send update confirmations from Calendar 2.0

☐ Attach iCalendar

Messages

[Edit Staff Confirmation Messages](#)

[Edit Staff Cancellation Messages](#)

Alerts for Avenyn

Based On	Name	On Event	Receiver Type	Receiver	Notification	
Resource	Resource 1	Create	User	annwan	SMS	Edit Delete
Service Name	All	Create	User	annwan	Email	Edit Delete

Rows per page: 10 1-2 of 2

5.5.1 Manage staff appointment alerts

1. Go to Staff Alerts > Appointment Alerts
2. The interval settings for how often the system should check for new or canceled appointments are read-only. Instead, they are managed in the settings for appointment confirmation and appointment cancellation notifications.
3. Select whether a new confirmation should be sent when changes are done from Calendar Client and if iCalendar should be attached.
4. Save.
5. In the Messages section, define SMS and/or email messages for appointment confirmations and appointment cancellations. You can add dynamic information by inserting parameters. If the message is written in a right-to-left language, for example Arabic, check the checkbox below the message field.
6. In the last section, select who should be receiving these alerts by selecting a branch and clicking **Add** .
7. Modify the following settings:

- **Based On:** The alert can be based on either resource or service.
- **Resource/Service Name:** The service or resource that triggers the alert.
- **Event:** Event that triggers the alert. Available options are Create and Cancel.
- **Receiver Type:** User, Role or Manual Input.
- **User/Role/Direct:** Depending on which receiver type you selected, select which user or role that should receive this alert. If you selected manual input, enter a list of email addresses or phone numbers, separated by comma.
- **Notification:** The notification type. Available options are Email, SMS and Both.

Edit Staff Appointment Alert

Based On Required
Service Name

Service Name Required
Apply for a loan

Event Required
Create

Receiver Type Required
User

User Required
annwan

Notification Required
SMS

[Cancel](#) [Save](#)

8. Save.

5.6 Staff Appointment SLA Alerts

Staff Appointment SLA Alerts can be used to send an alert once or twice per day when a resource group is booked to a certain % level. This gives managers the possibility to take action and for example make more resources available for bookings.

Appointment SLA Alerts

General Settings

☒ Enabled

Check daily at: 08:00

Check daily again at: 13:00

Check for x days from today: 2

Check for y days from starting day: 3

Save

Messages

[Edit SLA Messages](#)

Alerts for Avenyn

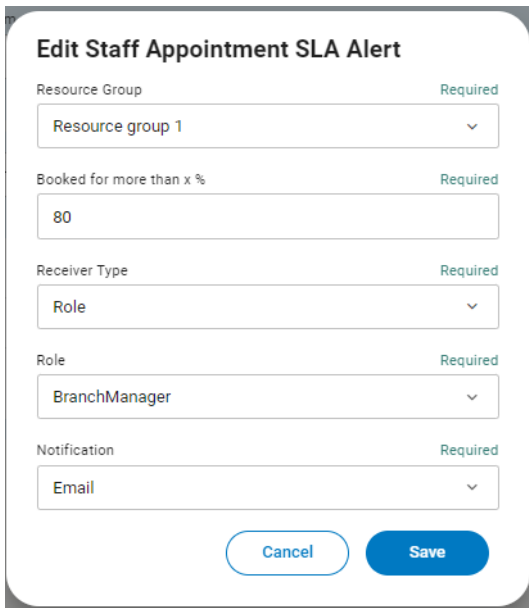
Based On	Receiver Type	Receiver	Notification	SLA
Resource group 1	Role	BranchManager	Email	80

Rows per page: 10 1-1 of 1

5.6.1 Manage staff appointment SLA alerts

1. Go to Staff Alerts > Appointment SLA Alerts
2. In the General Settings section, check the Enabled checkbox to enable these alerts.
3. Enter what time of the day you want the system to check if an alert should be sent. You can add up to two times. Also enter which days the system should check, for example 1 day from now and 2 days ahead.
4. Save.
5. In the Messages section, define SMS and/or email messages for appointment SLA alerts. You can add dynamic information by inserting parameters. If the message is written in a right-to-left language, for example Arabic, check the checkbox below the message field.
6. In the last section, select who should be receiving these alerts by selecting a branch and clicking **Add** .
7. Modify the following settings:
 - **Resource group:** Select a resource group
 - **Booked for more than x %:** Enter the % level for when an alert should be sent if it is exceeded.
 - **Receiver Type:** Select receiver type: User, Role or Manual Input.

- **User/Role/Direct:** Depending on which receiver type you selected, select which user or role that should receive this alert. If you selected manual input, enter a list of email addresses or phone numbers, separated by comma.
- **Notification:** Select if the alert should be sent by email, SMS, or both.



The screenshot shows a web form titled "Edit Staff Appointment SLA Alert". It contains five required fields, each with a "Required" label in green text to its right:

- Resource Group:** A dropdown menu with "Resource group 1" selected.
- Booked for more than x %:** A text input field containing the number "80".
- Receiver Type:** A dropdown menu with "Role" selected.
- Role:** A dropdown menu with "BranchManager" selected.
- Notification:** A dropdown menu with "Email" selected.

At the bottom of the form are two buttons: a light blue "Cancel" button and a dark blue "Save" button.

8. Save.

6. Appointment notifications

Topics in this chapter

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Appointment Reminder	42
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6.1 Overview

The Appointments tab has the following sub tabs: Appointment Confirmation, Appointment Reminder, Appointment Cancellation and Appointment Noshow. These are described below.

6.2 Appointment Confirmation

Appointment confirmations are sent out to customers when their appointments have been booked.

Appointment Confirmation

SETTINGS MESSAGES

General

☒ Enabled ☐ Attach ICalendar ☒ Do not send update confirmations from Calendar 2.0

CheckInterval (min) Phonefield can be found on Fieldname Notification Type Required

5 Customer phoneNumber Email and SMS Save

Branches and Services Filter Branches

Enabled	Name	# Services	
☒	Avenyn	4	
☒	Central Station	4	

Rows per page: 10 1-2 of 2 < >

6.2.1 Manage appointment confirmations

1. Go to Appointments > Appointment Confirmation.
2. On the Sections tab, in the General Settings, check the **Enabled** checkbox to enable appointment confirmations.
3. Go through the following settings:
 - **Attach ICalendar:** Attaches iCalendar to the appointment confirmation.
 - **Do not send update confirmations from Calendar 2.0:** If checked, a new appointment confirmation is not sent when updates are done to the appointment from Calendar 2.0.
 - **CheckInterval:** How often in minutes the system checks for new appointment bookings
 - **Phonefield can be found on:** Where the customer's phone number can be found. The available options are Customer and Appointment.

- **Fieldname:** The name of the field where the phone number can be found.
- **Notification Type:** The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Email and SMS

ⓘ Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

4. Select the branches and services for which the confirmation should be sent.
5. Go to the Messages tab and select the services you want to write a confirmation message for. Select **All** if you want to write a message for all services. You can have different messages for different services.
6. For each language, click **Edit row**  and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

Appointment Confirmation

SETTINGS
MESSAGES

Messages for Service

All
X

Language	SMS Message	Email Subject	Email Message	
English	Hi {{customerFirstName}}! Welcome to {{branchName}}, ...	Appointment Confirmation	Hi {{customerFirstName}}. Welcome to...	
French				
Spanish				

Rows per page: 10
1-3 of 3
<
>

7. Save.

6.3 Appointment Cancellation

Appointment cancellations are sent out to customers when their appointments have been canceled.

Appointment Cancellation

SETTINGS
MESSAGES

General

☒ Enabled
☐ Attach ICalendar

CheckInterval (min)

5

Phonefield can be found on

Customer

Fieldname

phoneNumber

Notification Type

SMS

Required

Save

Branches and Services

Filter Branches

Enabled	Name	# Services	
	Avenyn	0	
	Central Station	0	

Rows per page: 10
1-2 of 2

6.3.1 Manage appointment cancellations

- Go to Appointments > Appointment Cancellation.
- On the Settings tab, in the General Settings, check the **Enabled** checkbox to enable notifications for appointment cancellations.
- Go through the following settings:
 - Attach ICalendar:** Attaches iCalendar to the appointment cancellation message.
 - CheckInterval:** How often in minutes the system checks for new appointment cancellations.
 - Phonefield can be found on:** Where the customer's phone number can be found. The available options are Customer and Appointment.
 - Fieldname:** The name of the field where the phone number can be found.
 - Notification Type:** The following options are available:
 - Email then SMS
 - Email
 - SMS

- Email and SMS

ⓘ Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

4. Select the branches and services for which the reminder should be sent.
5. Go to the Messages tab and select the services you want to write a reminder message for. Select **All** if you want to write a message for all services. You can have different messages for different services.
6. For each language, click **Edit row**  and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

Appointment Cancellation

 SETTINGS
  MESSAGES

Messages for Service

All 

Language	SMS Message	Email Subject	Email Message
English	You have canceled you appointment at {{branchName}}		
French			
Spanish			

Rows per page: 10  1-3 of 3 < >

7. Save.

6.4 Appointment Reminder

Appointment reminders are sent out to customers a defined time before their appointment start time.

Appointment Reminder

[SETTINGS](#)
[MESSAGES](#)

General

☒ Enabled

CheckInterval (min)
 First Reminder Time (hours before)
 Second Reminder Time (minutes before)

Phonefield can be found on
 Fieldname
 Notification Type
 Required

[Save](#)

Branches and Services

Filter Branches

Enabled	Name	# Services	
	Avenyn	4	
	Central Station	0	

Rows per page: 1-2 of 2 < >

6.4.1 Manage appointment reminders

- Go to [Appointments > Appointment Reminder](#).
- On the Settings tab, in the General Settings, check the **Enabled** checkbox to enable appointment reminders.
- Go through the following settings:
 - CheckInterval:** How often in minutes the system checks for new appointment no-shows.
 - Time after End Time (hours):** Number of hours after the appointment that the notification is sent.
 - Phonefield can be found on:** Where the customer's phone number can be found. The available options are Customer and Appointment.
 - Fieldname:** The name of the field where the phone number can be found.
 - Notification Type:** The following options are available:
 - Email then SMS

- Email
- SMS
- Email and SMS

ⓘ Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

4. Select the branches and services for which the notification should be sent.
5. Go to the Messages tab and select the services you want to write a reminder message for. Select **All** if you want to write a message for all services. You can have different messages for different services.
6. For each language, click **Edit row**  and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

Appointment Noshow

✎ SETTINGS ✉ MESSAGES

Messages for Service All ✕ ✕ ▾

Language	SMS Message	Email Subject	Email Message
English	We missed you today! Wante to book a new appointment?...		
French			
Spanish			

Rows per page: 10 ▾ 1-3 of 3 <

7. Save.

6.5 Appointment No-Show

Appointment No-Show notifications are sent out when an appointment visit is marked as a no show. The notification can be used to ask the customer to book a new appointment, or send a link to a questionnaire to find out why he or she didn't turn up.

Appointment Noshow

SETTINGS MESSAGES

General

☒ Enabled

CheckInterval (min) Time after End Time (hours) Phonefield can be found on Fieldname Notification Type Required

5 1 Customer phoneNumber SMS

Save

Branches and Services

Filter Branches

Enabled	Name	# Services
☒	Avenyn	4
☒	Central Station	4

Rows per page: 10 1-2 of 2

6.5.1 Manage appointment no-show notifications

- Go to Appointments > Appointment Noshow.
- On the Settings tab, in the General Settings, check the **Enabled** checkbox to enable appointment no-show notifications.
- Go through the following settings:
 - CheckInterval:** How often in minutes the system checks for new appointment reminders.
 - First Reminder Time (hours before):** Number of hours before the appointment that the first reminder is sent.

⚠ If the appointment is booked closer to the start time than the reminder time, no reminder is sent out.
 - Second Reminder Time (hours before):** Number of hours before the appointment that the second reminder is be sent. Enter 0 if you don't want a second reminder.
 - Phonefield can be found on:** Where the customer's phone number can be found. The available options are Customer and Appointment.

- **Fieldname:** The name of the field where the phone number can be found.
- **Notification Type:** The following options are available:
 - Email then SMS
 - Email
 - SMS
 - Email and SMS

ⓘ Email then SMS can be used as a fallback method. If a valid email address is missing, an SMS will be sent.

4. Select the branches and services for which the reminder should be sent.
5. Go to the Messages tab and select the services you want to write a reminder message for. Select **All** if you want to write a message for all services. You can have different messages for different services.
6. For each language, click **Edit row**  and start composing the messages for SMS and email. You can add dynamic information such as branch name and ticket number in the messages by inserting parameters.

Appointment Noshow

 SETTINGS  MESSAGES

Messages for Service All   

Language	SMS Message	Email Subject	Email Message
English	We missed you today! Wante to book a new appointment?...		
French			
Spanish			

Rows per page: 10  1-3 of 3 

7. Save

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