

QMATIC

MANUAL

GROUP NOTIFICATION

263.01D

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Content

- 1. What's new..... 1**
- 2. Installation 3**
 - 2.1. Prerequisites.....4
 - 2.2. Installation4
 - 2.3. Access rights5
- 3. Using Group Notification 7**
 - 3.1. Introduction.....8
 - 3.2. Notification languages8
 - 3.3. Create and edit notification templates 11
 - 3.4. Send group notification..... 12
 - 3.5. Notification types 15

1. What's new

Version	Chapter	Change
01.A	• General	• Manual for Group Notifications created
01.B	• Using Group Notification	• Cancel Appointments functionality added
01.C	• Using Group Notification	• Added info about possibility to select "Default" as notification type • Added option to filter appointments on service
01.D	• Installation	• Added information about Group Notification access modules

2. Installation

Topics

Prerequisites.....	4
Installation.....	4
Access rights	5

2.1 Prerequisites

- Notification Admin 6.1.0 need to be installed and SMS and/or email settings need to be configured.

2.2 Installation

This section describes how to manually install Group Notification. If you install from Xtend, go to step 5.

1. Copy the groupnotification.war file to the custdeploy folder of Orchestra.
2. Add the file groupnotificationMessages.properties to
<Orchestra_install_dir>\system\conf\lang.
3. To make the required changes to the qp_central database and add all access modules, execute update_central.sql from the sql folder.
4. Add the following lines to the file applicationMessages.properties, located in
<Orchestra_install_dir>\system\conf\lang.
application.groupnotification = Group Notification
application.groupnotification.description = Group Notification
module.groupnotification = Group Notification
5. In groupnotificationMessages_xx.properties, configure the date and time format for the date picker. It can be configured for each language.
These are the settings in the properties file:
general.dateFormat = DD/MM/yyyy
general.timeFormat = HH:mm
6. Restart Orchestra Central.
7. Set up roles and assign them to users who are going to use Group Notification. See “2.3 Access rights” on page 5.

2.3 Access rights

Users of Group Notification need to be assigned to a role with any of the following access modules, depending on what the user should be able to do:

- Group Notification
- Group Notification Admin

Table 1: Group Notification access modules

Feature	Group Notification Admin	Group Notification
Set up languages	✓	
Create templates	✓	
Edit templates	✓	
Send notifications	✓	✓

3. Using Group Notification

Topics

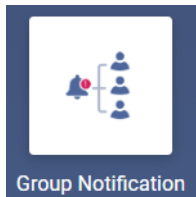
Introduction	8
Notification languages	8
Create and edit notification templates	11
Send group notification	12
Notification types	15

3.1 Introduction

With Group Notification, you can send email and SMS messages for a group of appointments, for example if a branch needs to close one day and you want to inform the affected customers. It is also possible to cancel a group of appointments.

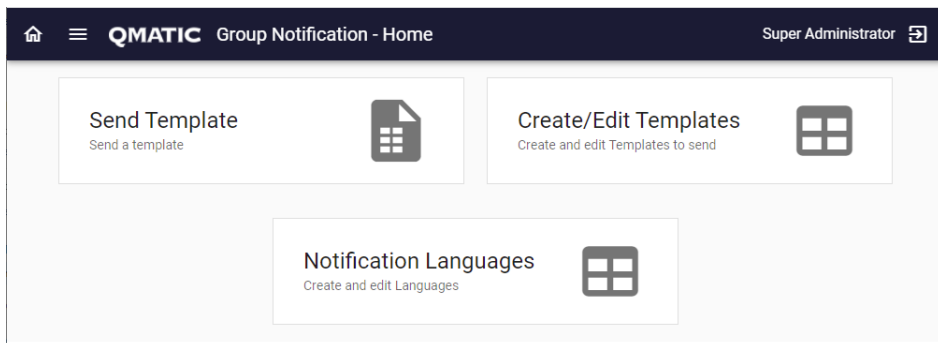
The content of the notifications are managed by creating templates.

To open Group Notification, go to `<Orchestra_host:port>/groupnotification`, or click on the Group Notification icon on the Orchestra start page.



Group Notification consists of three parts:

- **Notification Languages**, where you configure the languages for your notifications.
- **Create / Edit Templates**, where you create templates for the content of your notifications.
- **Send Template**, where you send your templates as notifications.



3.2 Notification languages

Group notifications can be sent in different languages. For this, you need to add languages to the list of available languages and then create templates for all languages.

The languages you add in Group Notification are stored in the same way as the languages in the Notification Admin. This means any changes done to the list of languages in Group Notification will be shown in Notification Admin, and the other way around.

You need to select one language as the default language. The notification will be sent in the default language in the following cases:

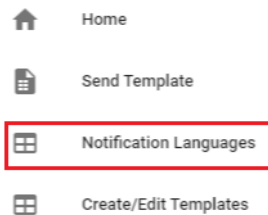
- if no language is stored on the customer or the appointment
- if no message is set up for the language stored on the customer or the appointment.

3.2.1 Add languages

To be able to create templates in different languages, you first need to add all languages that you want to create templates for.

To add a notification language:

1. Go to **Notification Languages**.



2. To add a new language, click **Add language** .

Notification Languages

Language Code *

Name *

* Indicates required field

SAVE CANCEL

3. Enter language code (two characters, according to ISO-639-1) and language name.
4. Save.

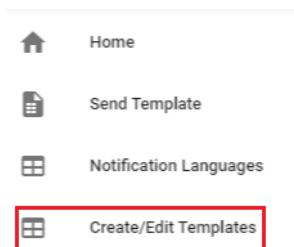
3.2.2 Manage languages

- To edit a language, click **Edit** . Only the name can be edited. If you want to change the language code, you need to delete the language and add a new one.
- To delete a language, click **Delete** . Confirm that you want to delete the language.
- To refresh the list of language, click **Refresh** 

3.3 Create and edit notification templates

To create and edit templates:

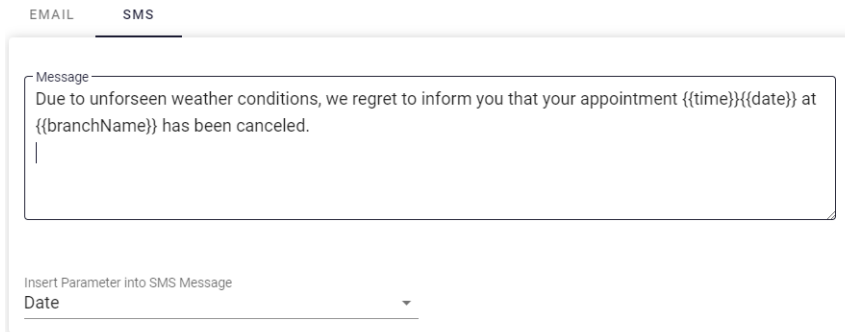
1. Click on the **Create/Edit Templates** menu item.



2. Click **Add template** .

A screenshot of a form titled 'Template' in a dark header. The form has four input fields: 'Name *', 'Description', 'Default Notification ...' (with a dropdown arrow), and 'Email Content Type' (with a dropdown arrow). Below these is a language selection dropdown labeled 'Please select a Language'. At the bottom right of the form are two buttons: 'SAVE' and 'CANCEL'.

3. Enter the following information:
 - **Name:** Give the template a descriptive name so you can easily find it later
 - **Description:** Optionally, describe when or how the template should be used.
 - **Default Notification Type:** E.g. email or SMS. The default notification type can be changed when sending the notification.
 - **Email Content Type:** Text or HTML.
4. Select a language
5. Write the email and/or the SMS message in the message editor. You can use parameters in the message.



The screenshot shows a web interface for editing an SMS message. At the top, there are two tabs: 'EMAIL' and 'SMS', with 'SMS' being the active tab. Below the tabs is a large text area labeled 'Message' containing the text: 'Due to unforeseen weather conditions, we regret to inform you that your appointment {{time}}{{date}} at {{branchName}} has been canceled.' Below the text area is a dropdown menu labeled 'Insert Parameter into SMS Message' with 'Date' selected.

6. Optionally, select another language and enter a message for that language.
7. Save.

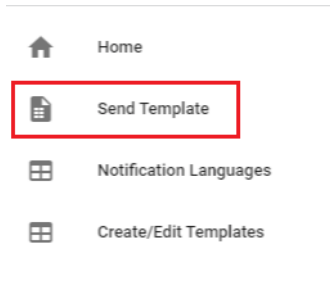
3.3.1 Manage notification templates

- To edit a template, click **Edit** . Templates can only be edited by one person at a time. A template can not be sent as a notification if another user is editing it.
- To delete a template, click **Delete** . Confirm that you want to delete the template.
- To refresh the list of templates, click **Refresh** .
- To send a template, click **Send** . This will take you to the **Send Template** view. For more information, see “3.4 Send group notification” on page 12.

3.4 Send group notification

To send a notification template:

1. Click the **Send Template** menu item.



2. Select which template you want to send.
3. Select a notification type; the type defined in the template is preselected, but it can be changed.
4. Select for which branch the notification should be sent.
5. Select a time range for when you want to search for appointments.
6. Optionally, select a service to filter on.
7. Click **Find appointment** to find all appointments within the given time frame.
8. Optionally, if you want to cancel the appointments after sending the notification, check the box **Cancel Appointments**.

⚠ When using this functionality, the default Appointment Cancel Notification will not be sent.

9. Select the appointments to which the notification should be sent by checking the check boxes.

To select all appointments, select the top check box next to First Name.

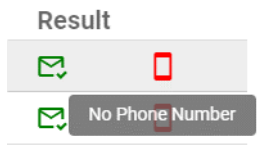
10. Click **Send**.

	First Name	Last Name	Email	Phone	Date	Time	Service(s)	Result
☐	John	Customer	john.customer@abc.com	44722222222	23/11/2022	10:30	Service 002	

Once notifications have been sent, you will see the result per notification type, with one icon for email and one icon for SMS.

Result
 
 

- Green means the notification was successfully sent
- Red means the notification could not be sent for some reason. You can hover over the icon for more information.



If the notification could be sent for email, but not SMS or vice versa, the row will display as yellow, as a warning.

If no notification could be sent, the row will display as red, as an error.

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Group Notification - Send Template

Super Administrator

Template Closure

Notification Type

Email & SMS

Branch

Branch 1

Between

13/01/2022

at

00:00

and

13/01/2022

at

23:45

FIND APPOINTMENTS

RESEND

Search

Show all

Show Errors

Show Warnings

Show not sent

First Name

Last Name

Email

Phone

Date

Time

Service(s)

Result

Test

One

a12@gmail.com

13/01/2022

09:00

Service 1

Test

Two

abc@gmail.com

13/01/2022

10:00

Service 2

Items per page:

10

1-2 of 2

You can filter the appointment list to only show errors and warnings.

3.4.1 Resend notifications

For appointments marked as warnings or errors, where the notifications weren't sent correctly, you may want to resend the template.

1. Make sure to correct what went wrong when sending the notification the first time. For example, add a phone number if the customer is lacking one (if you can).
2. Select the appointments for which you want to resend the notification.
3. Click **Resend**.

3.5 Notification types

The following notification types exist:

- **Default:** In cases where the customer or the staff member can choose a notification type, for example Qmatic Web Booking or Concierge, then that chosen notification type is used. If none is chosen, the notification type defined in Notification Admin is used.
- **SMS**
- **Email**
- **Email & SMS:** Both email and SMS are sent
- **Email then SMS:** The system tries to send an email first. If that fails, the system tries to send an SMS.

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