QMATIC

User's Guide

Counter Tablet

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Counter Tablet

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Introduction

This guide presents the standard procedures and features in the CounterTablet app.

Counter is an easy-to-use browser application for calling customers. With Counter Tablet, you can do the following:

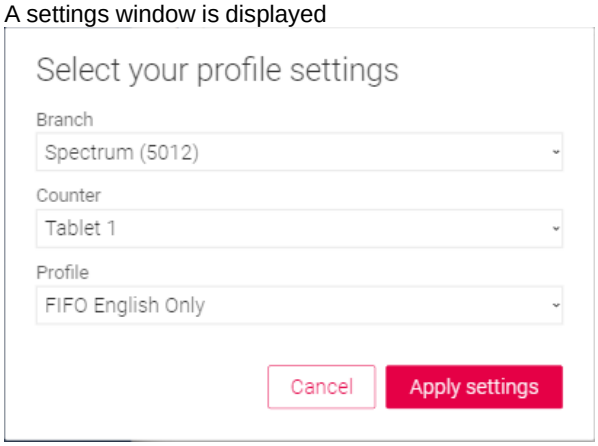
- ✓ Call visits
- ✓ Remove visits
- ✓ Create and remove customers
- ✓ Edit customers
- ✓ Cherry-pick visits to serve
- ✓ Transfer visits
- ✓ Walk direct

ⓘ Your system and user role configurations may differ from those presented inthis user's guide.

Getting started with Counter Tablet

1. Open **Counter Tablet**

A settings window is displayed



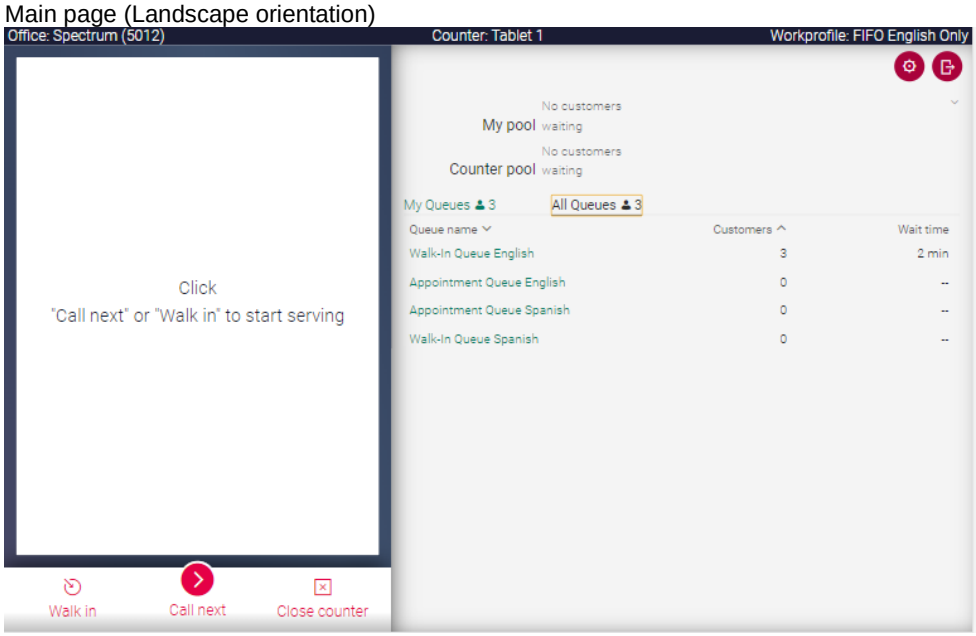
2. Select branch, counter and profile, and click **Apply settings**.

   ⓘ It is strongly recommended that the same user should *not* be logged in to the same counter from two different browsers at the same time.

3. The main page should display in either landscape or portrait mode depending on tablet's orientation.

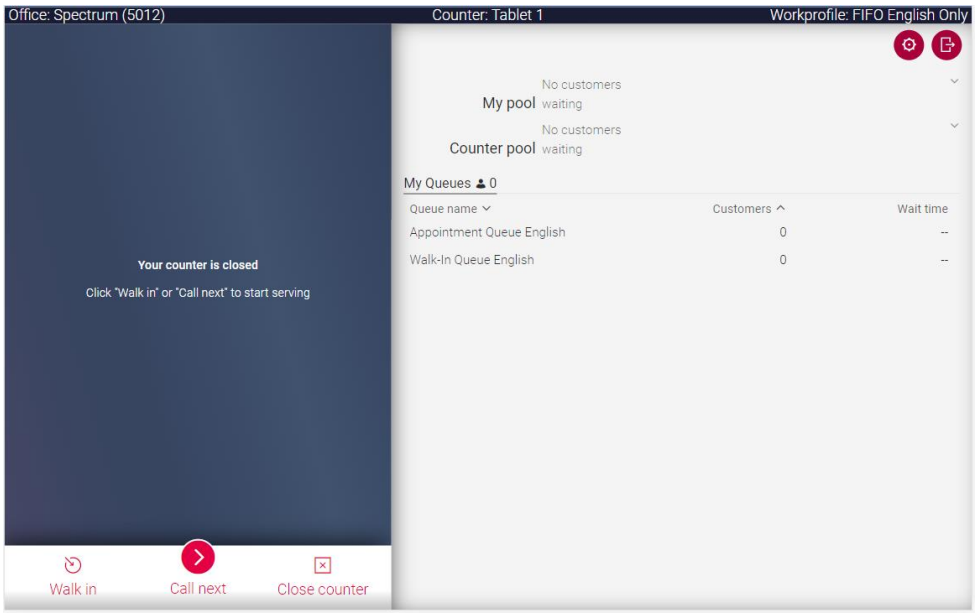
   ⓘ Your main page may look different, depending on how your system is configured.

Main page (Landscape orientation)



Main Page (Portrait Orientation)

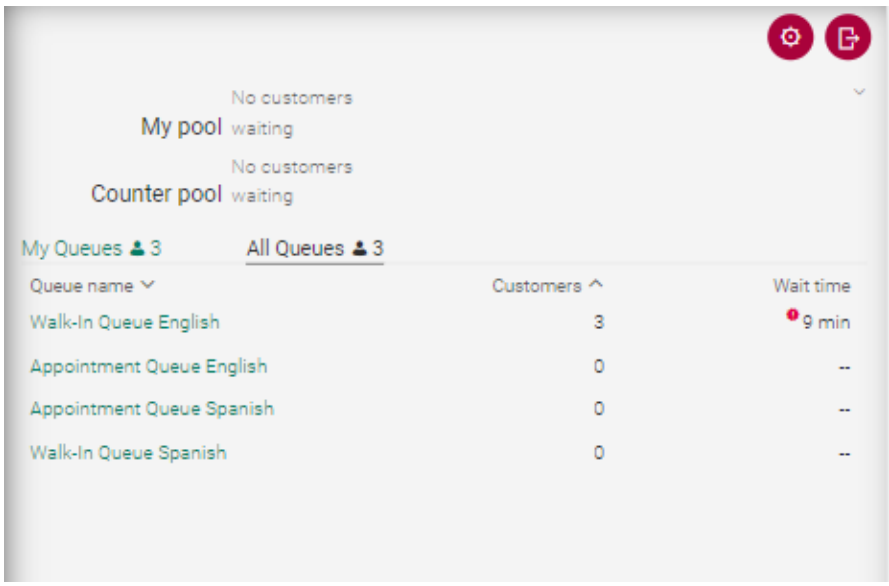
ⓘ If the counter is closed, you will see the following message displayed on the visit info view:



Changing work profile settings

There are times when staff needs to switch their work profile settings. These settings include branch, counter and work profile. To access work profile settings, click on the red gear button located on the top right of the main page.

Viewing queue information



The app's start page is divided into two areas: Visit Information view, Queue Information view. The Queue Information view should be displayed either on the top half of the screen or the right side of the screen, depending on your tablet's orientation. Contents of the Queue Information view are optional and will depending on how your system is configured. You can toggle between My Queuesand All Queues.

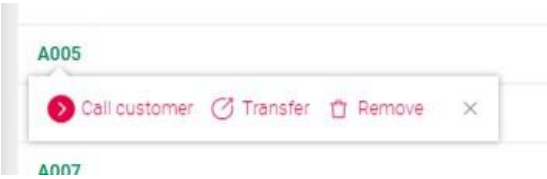
At the top, you can find the visits that have been transferred to your staff pool aswell as the counter pool.

Click the sorting buttons to sort the list according to Queue name, customers, orWait time.

ⓘ Note that the waiting time displayed here comes from the first visit in the queueand not

the maximum wait time of all visits in the queue.

Click on the link for each queue to expand it and see all the visits in the queue,making it is possible to do the following:



- Call the visit, by clicking **Call customer**.
- Transfer the visit, by clicking **Transfer**.
- Remove a visit, by clicking **Remove.**

Calling customers

You have three ways to call a customer for service:

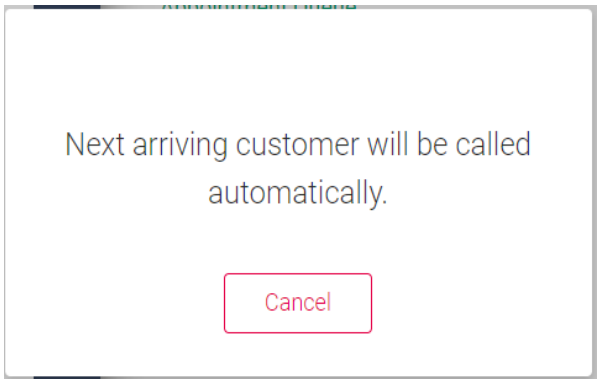
- Click **Call next** . This calls the next customer according to the work profile. See "Calling next visit" on page 7.
- Click **Walk in** . This calls a customer that has not taken a ticket. See "Calling a customer without a ticket - Walk in" on page 9.
- Click on a queue and select a ticket number to call. This calls a particular customer out of queue order. See "Calling a customer out of queue order" on page 11.

Calling next visit

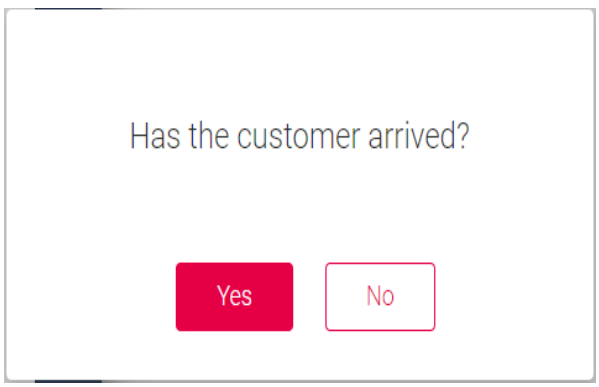
Click the **Call next** button to call the next waiting visit according to your work profile. This also closes the ongoing visit.

If you have **Store next** enabled, this means that the next customer in line, according to your work profile, will be called automatically.

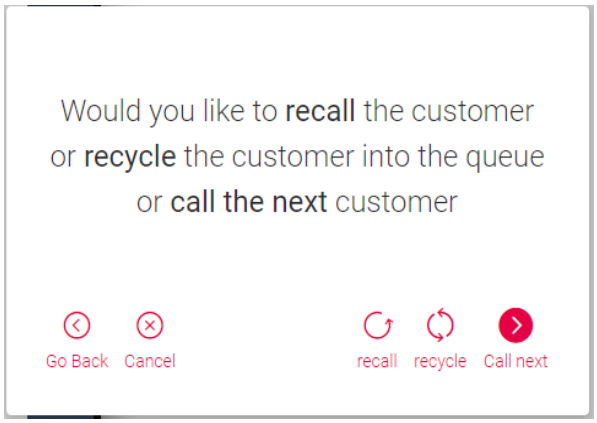
If there is no one waiting to be served at the moment, with Store next enabled, youwill see the following message:



If there are waiting customers in your queue and if your service point has been setup as **Confirm needed** in the Business Configuration of your branch (see the Administrator's Guide for more information), the following message will appear:



If you click **Yes**, you can proceed with working with the transaction. Should you instead click **No**, the following message will appear, giving you the choice to recall, recycle, or call the next customer. Clicking **Cancel** here would imply that the customer did not show up. If you click **Go Back**, you will be asked again whether or not the customer has arrived:



To see the options, you have once a customer is called, please see "Working with the called visit - the visit card" on page 12.

Calling a customer without a ticket - Walk in

A customer without a ticket can be entered into the system and called for service using the walk-in feature. The walk-in feature lets you place a virtual ticket into the service queue of your choice.

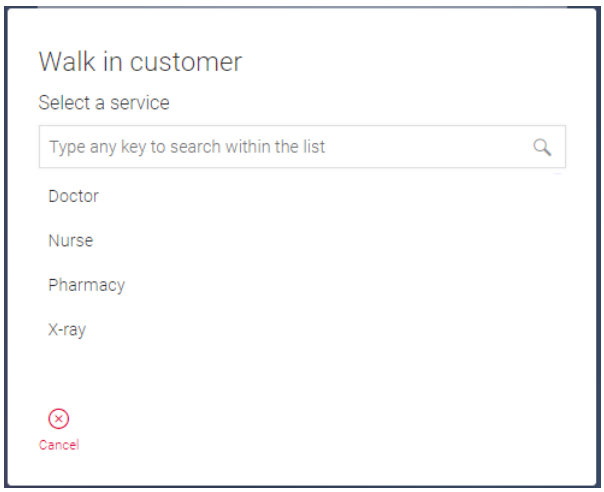
A typical scenario is when no one is waiting in line and a customer approaches a counter without first taking a ticket.

The ticket is called immediately following the selection of the service.

To call a customer without a ticket:

1. Click the **walk-in** icon .

   The list of available services is displayed, and it is also possible to search for aservice:



   If your system is configured so that a default walk-in service is set, this page is bypassed and a visit with the default service will automatically be started instead.

2. Select a service. The visit is tied to this service allowing the system to record thetransaction. The visit is called, and the counter page is displayed.

   This visit is only created within the system, no ticket will be printed

3. Handle this visit in the same way as you would with any other visit.

   For more information, see "Working with the called visit - the visit card" on page 12.

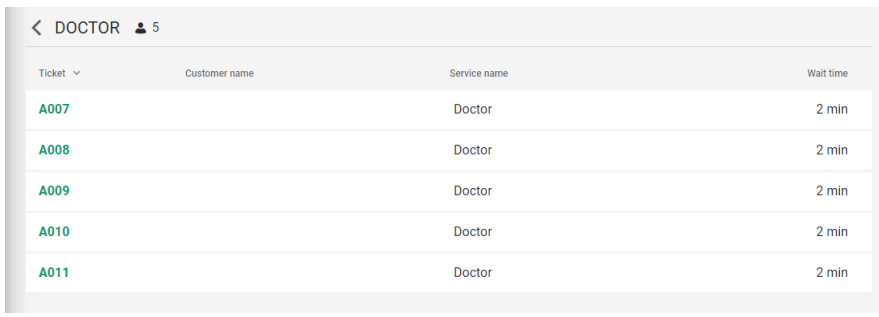
Calling a customer out of queue order

In certain situations, you may want to call customers, even if it is not their turn. Thiscan be done regardless of how your work profile is set up.

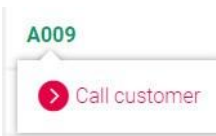
It is done in the following way:

1. In the queue area, expand the wanted queue.

   You will see all the visits in the queue:

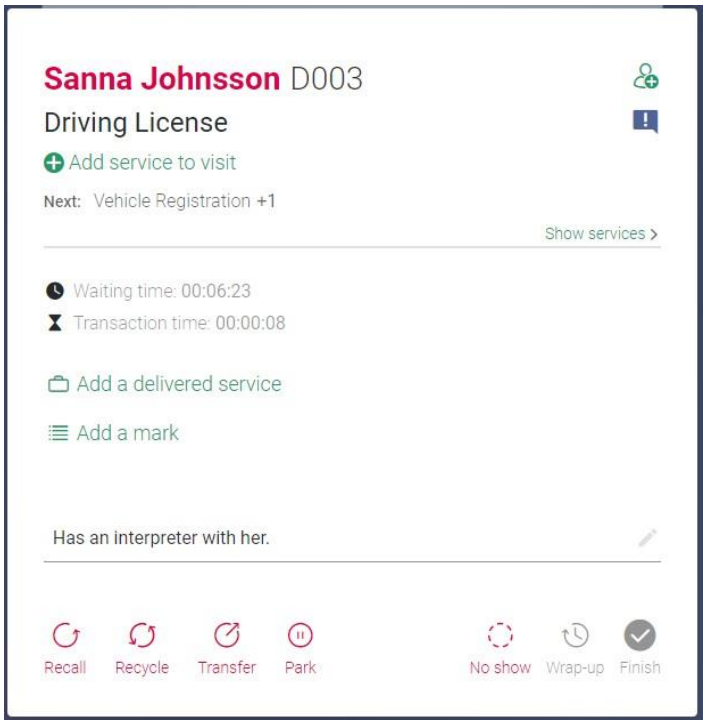


2. Click the visit number that you want to call, select the *Call customer* action:



   Handle the visit as you would handle any other visit, see "Working with the called visit - the visit card" on page 12.

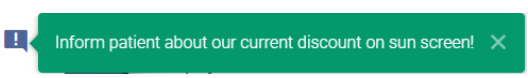
Working with the called visit - the visit card



The visit card contains the following information:

- **Customer name** – and a plus sign if several customers are linked to the visit.
- **Visit number** – for example A001.
- **Service name** – the name of the service that this visit applies to.
- **Context Marketing** – if the Context Marketing icon is shown, this means that there is an available Context Marketing message.

  An example of a Context Marketing message is:

- **Waiting time** – the time the customer has waited, before he/she was called.
- **Transaction time** – the time since the transaction started. Here, your systemmay also be configured to show the expected transaction time in parenthesis.

- **Notes** – here you can see the note for the visit, if available. You can also add notes here. See "Adding and editing notes for an ongoing visit" on page 14.

In the visit card, you can do the following things:

- Click the **add customer** icon to add a customer or edit the customer information. See "Adding a customer and edit customer information" on page 14.

- Click **Add service to visit** to add another service or turn the visit into a multi-service visit. It is also possible to delete services here. See "Adding/editing services" on page 15. Only the *Next* service will be shown, but if several are added, it is possible to expand the list of services to see them all.

- Click **Show services** button to show additional services connected to the visit. It is also possible to select a service to serve here. For more information, see "Show services and select a service to serve" on page 17.

- Click **Add delivered service** to add a delivered service. For more information, see "Adding a delivered service" on page 17.

- Click **Add marks** to add marks. For more information, see "Adding marks" on page 18.

- Click **Add outcome** to add an outcome. For more information, see "Adding outcomes" on page 19.

- Click **Recall** to recall the visit, see "Recalling a visit" on page 20.

- Click **Recycle** to recycle the visit, see "Recycling a visit" on page 20.

- Click **Transfer** to transfer the visit, see "Transferring a visit" on page 20.

- Click **Park** to park the visit, see "Parking an ongoing visit" on page 23.

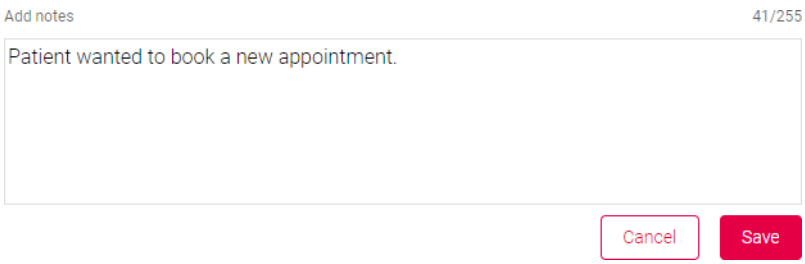
- Click **No show** to set the visit as No show, see "Setting a visit as no show"on page 23.

- Click **Wrap-up** to wrap up the visit, see "Wrapping up the visit" onpage 23.

- Click **Finish** to finish the visit, see "The Finish button" on page 24

Adding and editing notes for an ongoing visit

Notes may already have been added in the Reception application. If so, they will be visible on the visit card. To edit or add more notes, click the **Notes** icon. The maximum number of characters for a note is 255. Notes are automatically saved.



Notes are only valid for as long as the visit is open. All notes are deleted when thevisit is closed.

Adding a customer and edit customer information

By linking a customer name to a visit after the visit has been called, the coming transactions, if any, will see the name of the customer with that visit number.

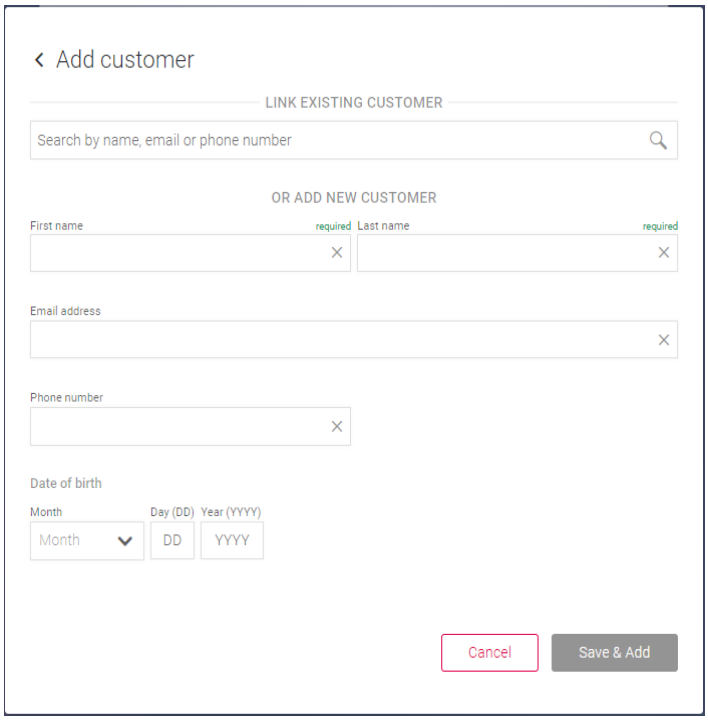
Link an existing customer

1. In the visit card, click the **Add customer** icon, .
2. In the Link existing customer field, start entering a name in the Search field. Thesearch begins when two characters have been entered. The search feature is not case sensitive, nor does it require a complete entry to successfully run a search.
3. A customer list is displayed; up to a maximum of 100 names.
4. Click the customer's name to select the customer.
5. Click **Save & Add** to link the customer to the visit.

To change an erroneously linked name, simply link another name.

Select a new customer

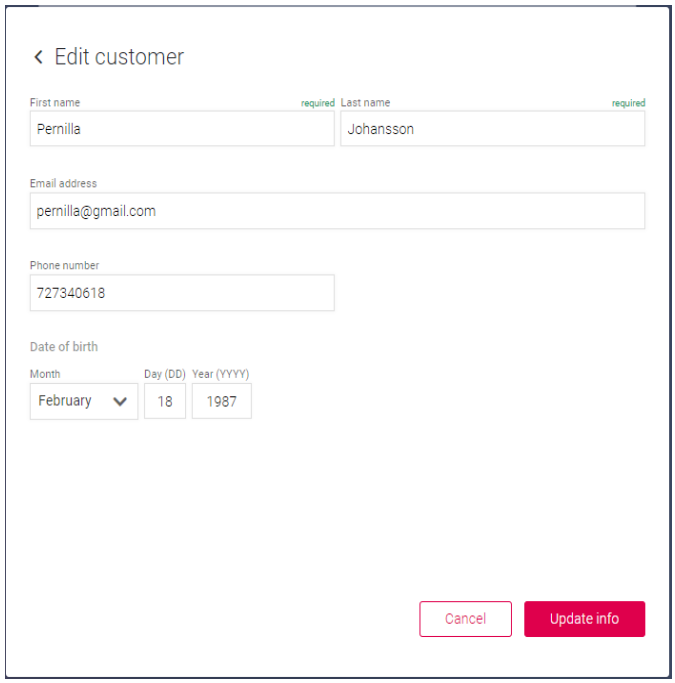
1. Click the **Add customer** icon, , on the visit card.



2. Fill in the customer details:
   - First name - required
   - Last name - required
   - Email address
   - Phone number
   - Date of birth
3. Click **Save & Add** to add the customer to the visit.

Edit customer information

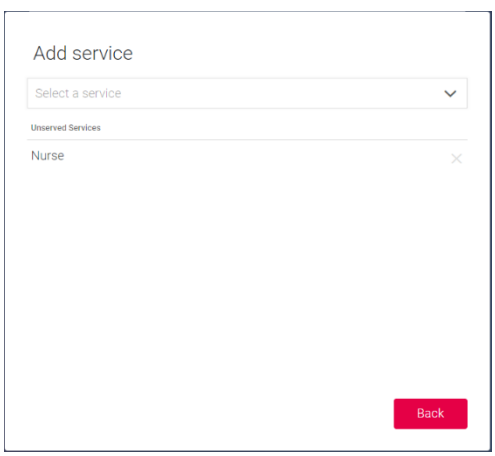
1. Click the name of the customer, on the visit card, next to the visit number. The Edit customer window will be displayed:



2. Edit the customer details. When done, click **Update info**.

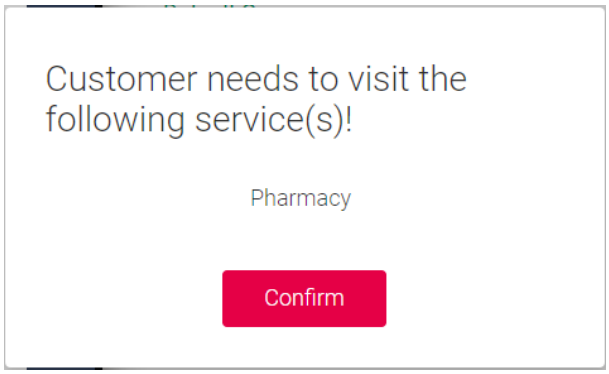
Adding/editing services

Depending on how your system is set up, it may be possible to add services to anongoing visit, turning it into a multi-service visit. This is done by clicking on the **Add service** icon on the visit card. The Add service window is displayed:



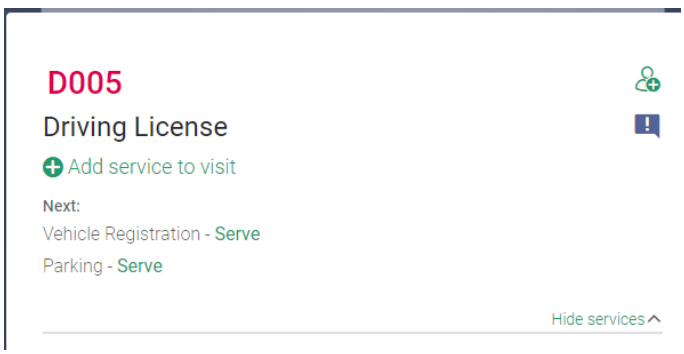
Here, you can select a service from the drop-down list. Unserved services will belisted and it is also possible to delete them from the list.

When a multi-service visit is finished, you will be asked to confirm that the customerhas more services to visit:



Show services and select a service to serve

By clicking the **Show services** button, you can see which services are connectedto the visit:



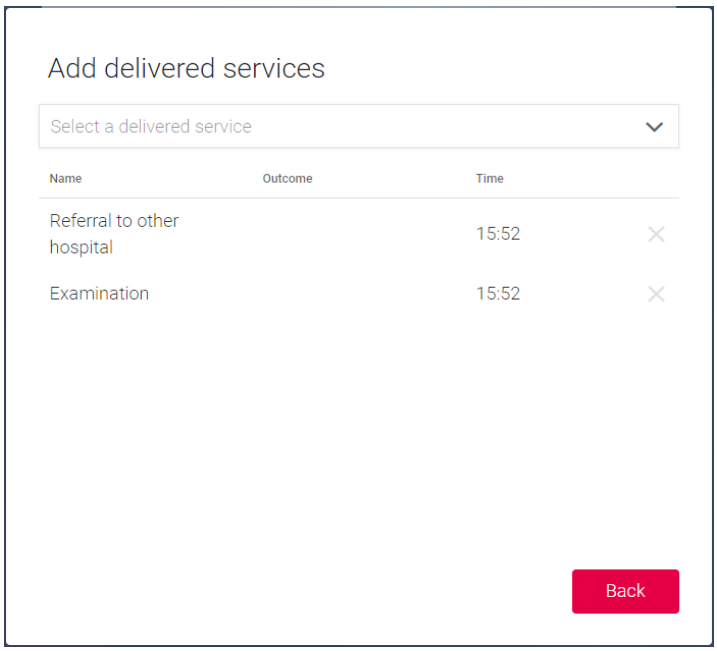
Click **Serve** to select a service to serve. This action will end the current service which means that if a delivered service/outcome is required, you have to add thatfirst. A message confirming which service you are currently serving will bedisplayed.

Adding a delivered service

(!) If a delivered service has been connected to this service, it *must* be added, be-fore it is possible to end the transaction.

Note that you can only add a delivered service when a ticket has been called.

1. Click the **Add delivered service** icon, . The Add delivered services windowis displayed:



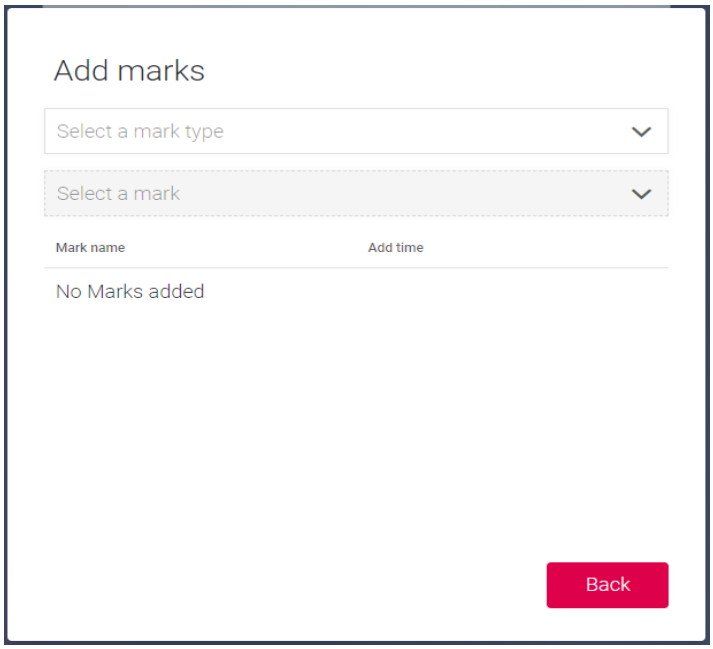
Here, you can search for a delivered service to add. If there is an outcome connected to the delivered service, you can select that here too.

The time that the delivered service was added will be shown in the Time column.

It is also possible to delete delivered services.

Adding marks

Depending on how your system is set up, it may be possible for you to add marks to the ongoing visit. This is done by clicking the **Add marks** icon, in the upper right area of the Counter window. The following window is displayed:



Select the wanted mark type, select a mark, and enter the number of marks to add(max 10). Then click **Add mark to visit.**

The entered marks will be listed in the Add marks window. It is possible to remove marks, see the name of it, as well as what time it was added.

Adding outcomes

(!) If an outcome has been connected to this service, it *must* be added, before it is possible to end the transaction.

Note that you can only add an outcome when a ticket has been called. In most cases you also have to add a delivered service.

1. On the visit card, click the **Add outcome** icon , if this is an outcome connected directly to the service. If not, follow the procedure described in "Adding a delivered service" on page 18.
2. Select an outcome from the drop-down list:

3. The wanted outcome is attached to the ongoing visit.
4. Add additional outcomes as needed.

Recalling a visit

If a customer does not respond to the initial call for service, the Recall feature al- lows you to call that visit a second time or more. Click the **Recall** icon to re-announce the most current visit on the displays and through the audio and/or video units available in your system. This option only operates for the most recent trans-action and for a visit that has not yet been closed.

ⓘ The transaction time is *not* reset to zero when a visit is recalled.

Recycling a visit

If a customer does not respond to the initial call for service, or for any other reasonyou want the customer to be called again later, the **Recycle** icon allows you to putthat visit back into the queue at the first position, but after a delay of a number of seconds (configurable).

ⓘ It is only possible to recycle a visit a certain number of times (default threetimes).

Transferring a visit

Use the Transfer feature to transfer a visit between queues, staff members or counters.

When transferring to a staff member or a counter, the visit will end up in their pool.For more information about pools, see “Pools” on page 23.

This feature is useful when multiple employees need to serve the same customer,or when

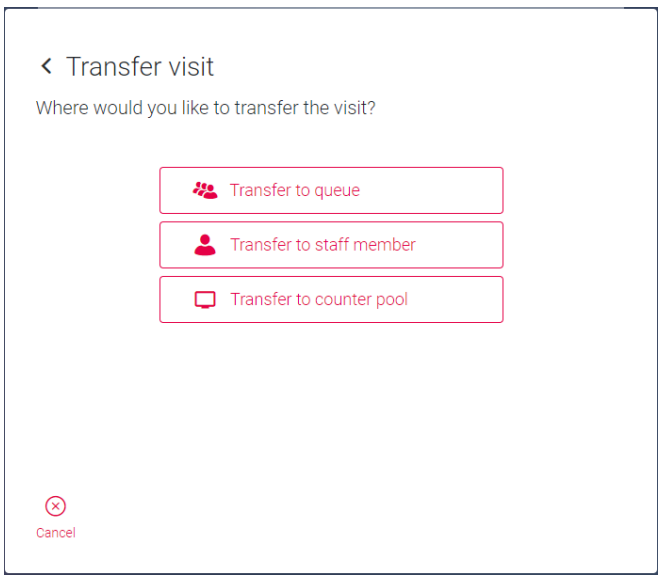
a customer for example needs to fill in a form before being served again.

To transfer a visit, prerequisites:

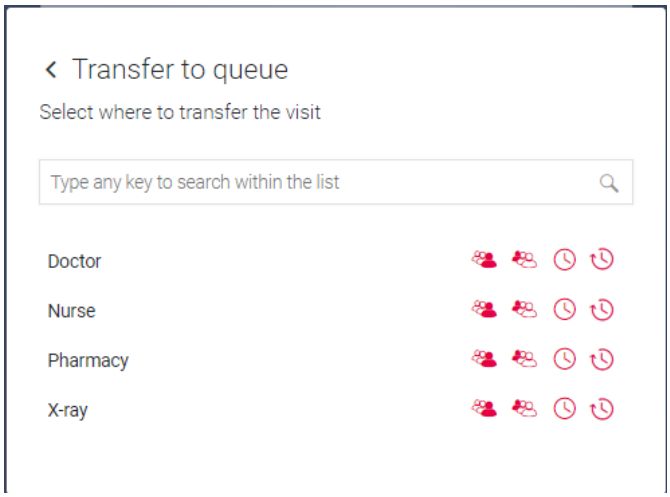
- The visit is called, and the service is provided.
- The visit remains open.

ⓘ It is also possible to transfer a visit without calling it first, by expanding a queue,selecting the wanted visit and then clicking on the **Transfer** icon.

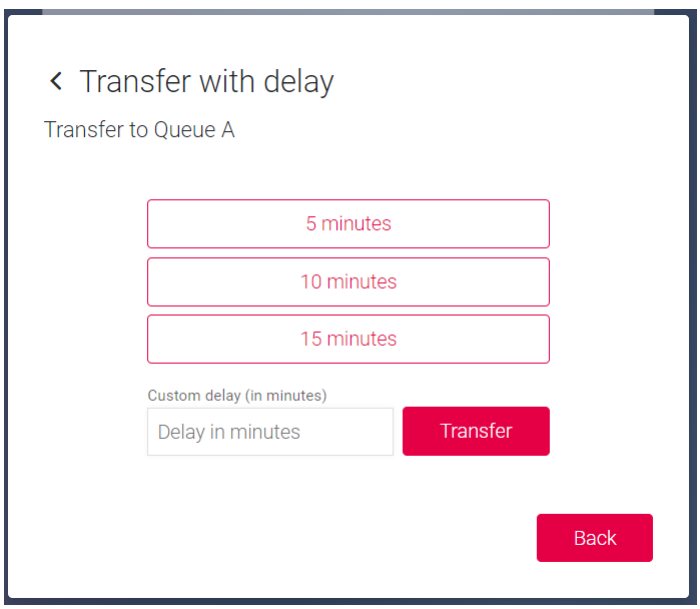
1. Click the **Transfer** icon. Decide if you want to transfer to a queue, a staffmember, or a counter pool:



Select the wanted queue, pool or staff member to transfer to. For queues, select if you want to transfer to first in line, last in line, based on visit lifetime or with adelay.



If you press Transfer with delay, you can either select one of the default optionspresented, or enter any number of minutes in the input field:



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.

Visits cannot 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 and customers in a poolthat does not have a certain order.

Pools may be connected to a certain work profile.

Parking an ongoing visit

If you click the **Park** icon, during an ongoing visit, the current visit will be sent to your staff pool.

Setting a visit as no show

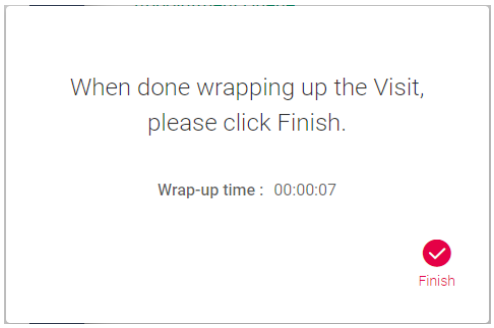
If a customer is called for service and does not show up, you can recall the visit byclicking the button for it, see “Recalling a visit” on page 35. If still no customer ap-pears, you can record the visit as a no show. The system then records no shows in the statistics, allowing management to track missed visits with the completed transactions.

To record a visit as a no show, simply click the **No show** icon. The visit is saved inthe statistics and closed.

Wrapping up the visit

Depending on how your system is set up, you may have the option to wrap-up thevisit. This may be useful for example if you need to finish some paperwork, after the customer has left and before the next customer is called.

Click the **Wrap-up** icon. The following window will be displayed:



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

Finishing the transaction

A transaction is finished by:

- Clicking the **Call next** icon
- Clicking the **Finish** icon
- Clicking the **Close counter** icon
- Transferring the visit to another queue or pool for additional service.
- Parking the visit, thus transferring it to your staff pool.

When it is mandatory to assign an outcome or delivered service to a visit, it is notpossible to finish a transaction unless an outcome and/or delivered service is as-signed.

The Finish button

The **Finish** icon ends the transaction of the customer that you are currently servingbut keeps the counter open.

Closing the counter

The **Close counter** icon ends the transaction of the customer that you are currentlyserving and closes your counter session.

Logging out

At any time during the work session, the staff needs to manually log out, he can do so by clicking on the red logout button located on the top right of the main page.

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