MANUAL

COUNTER

252.01A

Please send any feedback or questions about this manual to documentation@qmatic.com.

1. What’s new

Version	Chapter	Change
01.A	• General	• Separate manual for Counter created. Removed from Orchestra user guide.

2. Installation and setup

Topics in this chapter

2.1 Introduction

Counter is a staff application for calling and serving customers.

This chapter presents the installation and setup procedure for Counter.

2.1.1 Requirements

- Counter requires Qmatic Orchestra 7, or later.

2.2 Installation

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

1. Copy counter.war to <Orchestra_install_dir>\system\custdeploy.
2. Add the file counterMessages.properties to <Orchestra_install_dir>\system\conf\lang.
3. Make the required changes to the qp_central database. Don’t forget to commit the changes if needed.

   Postgres

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

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

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

   MSSql

   ```
   use qp_central

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

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

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

   Oracle

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

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

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

4. Restart Orchestra Central.
5. Create roles and users. See “2.3 Access rights” on page 3
6. Do the rest of the setup by adding and configuring unit types. See “2.4 Set up Counter” on page 4.

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

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

2.3 Access rights

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

- Counter
- Connector ServicePoint

2.4 Set up Counter

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

2.4.1 Counter unit types

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

- WebCounterMultiStaff
- WebServicePoint
- WebServicePoint_D924
- WebServicePoint_D924_WebCFU
- WebServicePoint_D948
- WebServicePoint_Expressia
- WebServicePoint_Expressia_D924
- WebServicePoint_PositionalDisplay
- WebServicePoint_PositionalDisplay_WebCFU

2.4.2 Add unit types on global level

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

2.4.3 Configure unit type on equipment profile level

4. In **Business Configuration** > **Operation Profile,** add the Counter unit types to the wanted equipment profiles.
5. On this level, there are quite a few settings that need to be configured. For example, you need to configure the settings for multi service and marks, how transfer should work, if the buttons for recycle, recall, no-show and wrap-up should be available and more.
6. **Save**.

2.4.4 Configure unit type on branch level

7. In **Business Configuration** > **Branches,** configure the settings on branch level. On this level, you can for example configure which views should be available, transfer options, if the buttons for notes and park should be available, walk times on queues and more.
8. Save and publish each branch.

You should now be able to open and log in to Counter.

3. Using Counter

Topics in this chapter

3.1 Introduction

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

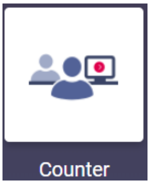
Counter is an easy-to-use browser application for calling and serving customers. With Counter, you can do the following:

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

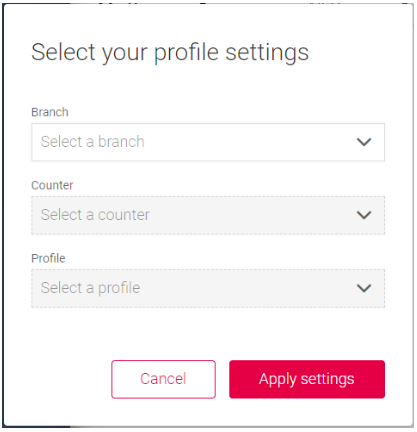
ⓘ The configuration for your system may differ from the one presented in this guide.

3.2 Getting started with Counter

1. Go to http:*<orchestra-ip>*:*<port>* or click the Orchestra bookmark in your web browser and log in.
2. Click the **Counter** icon on the Orchestra home page.



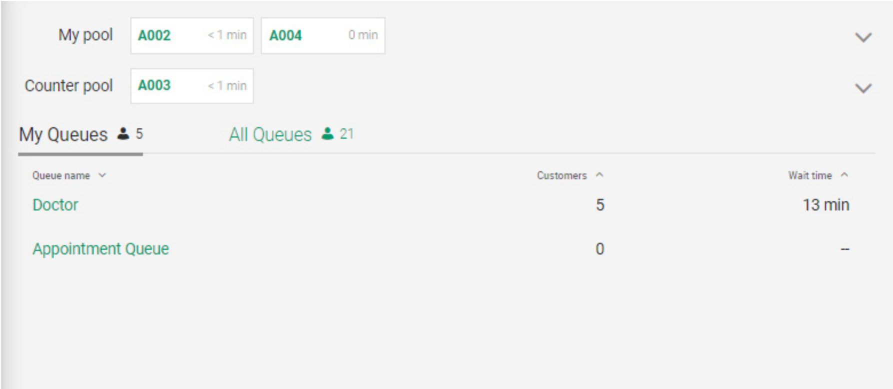
3. Select profile setttings:



4. 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.

3.3 View queue information



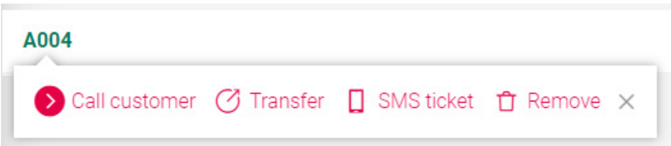
In the right area of your working space, you can monitor the queue information. Depending on how your system is configured, you can toggle between My Queues and All Queues.

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

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

Note that the waiting time displayed here comes from the first visit in the queue and not the maximum wait time of all visits in the queue.

Click on a queue to expand it and see all the visits in the queue. You will also see if there is a note attached to the visit. Hover over the note icon to see the note. By clicking on a visit, it is possible to do the following:



- Call the visit, by clicking **Call customer**.
- Transfer the visit, by clicking **Transfer**. Se also “3.5.10 Transferring a visit” on page 18
- Send a link to a virtual ticket by clicking **SMS ticket**. See also “3.5.12 Send SMS for ongoing visit” on page 21.
- Remove a visit, by clicking **Remove.**

3.4 Call a customer

There are three ways to call a customer for service:

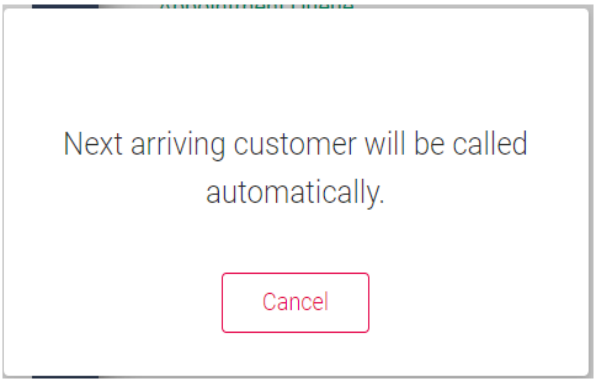
- Click **Call next** . This calls the next customer according to the work profile. See “3.4.1 Call the next visit” on page 5
- Click **Walk in** . This calls a customer that has not taken a ticket. See “3.4.2 Register a customer without a ticket - Walk in” on page 6.
- Call a customer out of queue order. This can be done either by clicking on a queue and select a ticket number to call, or you can select a ticket number from your pool to call. See “3.4.3 Calling a customer out of queue order” on page 7.

3.4.1 Call the next visit

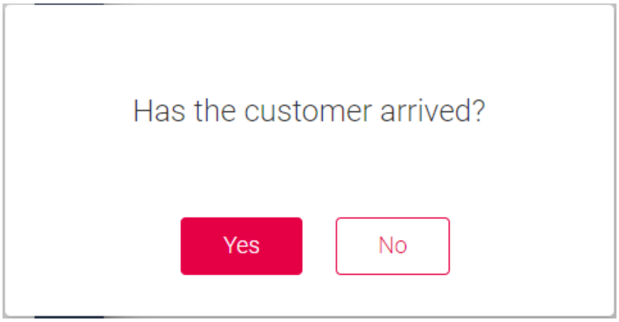
Click **Call next** to call the next waiting visit according to your work profile. This also closes the ongoing visit.

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

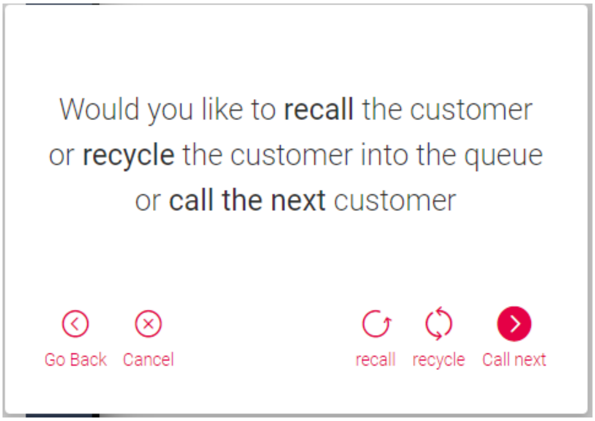
If there is no one waiting to be served at the moment, with Store next enabled, you will see the following message:



If there are waiting customers in your queue and if your service point has been set up as **Confirm needed** in the Business Configuration of your branch, 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 “3.5 Working with the called visit - the visit card” on page 9.

3.4.2 Register a customer without a ticket - Walk in

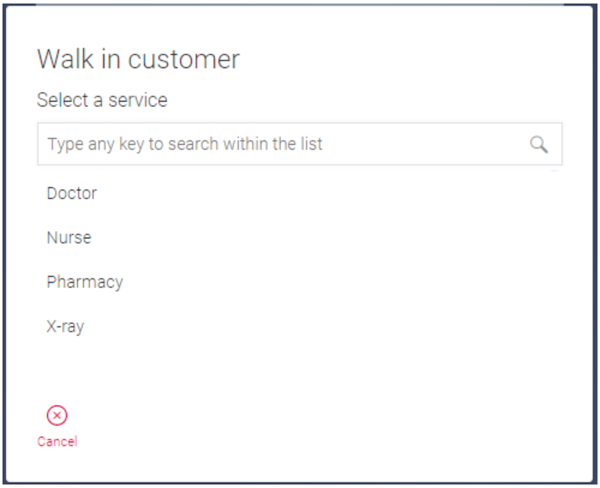
A typical scenario to use the Walk in feature (also called Walk direct) is when no one is waiting in line and a customer approaches a counter without first taking a ticket.

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

To register 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 a service:



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 the transaction. 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.

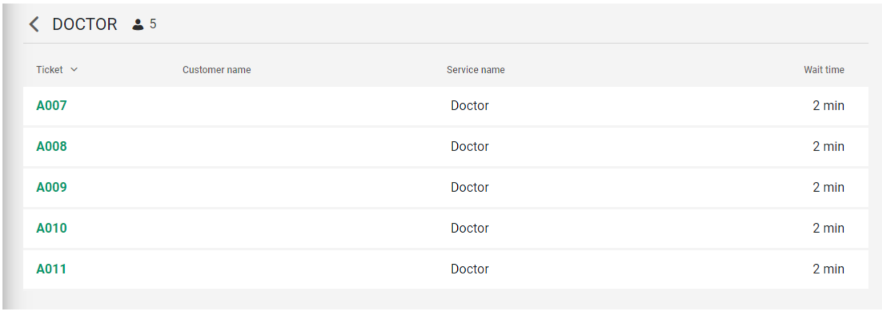
3.4.3 Calling a customer out of queue order

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

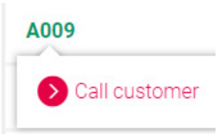
It is done in the following way:

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:

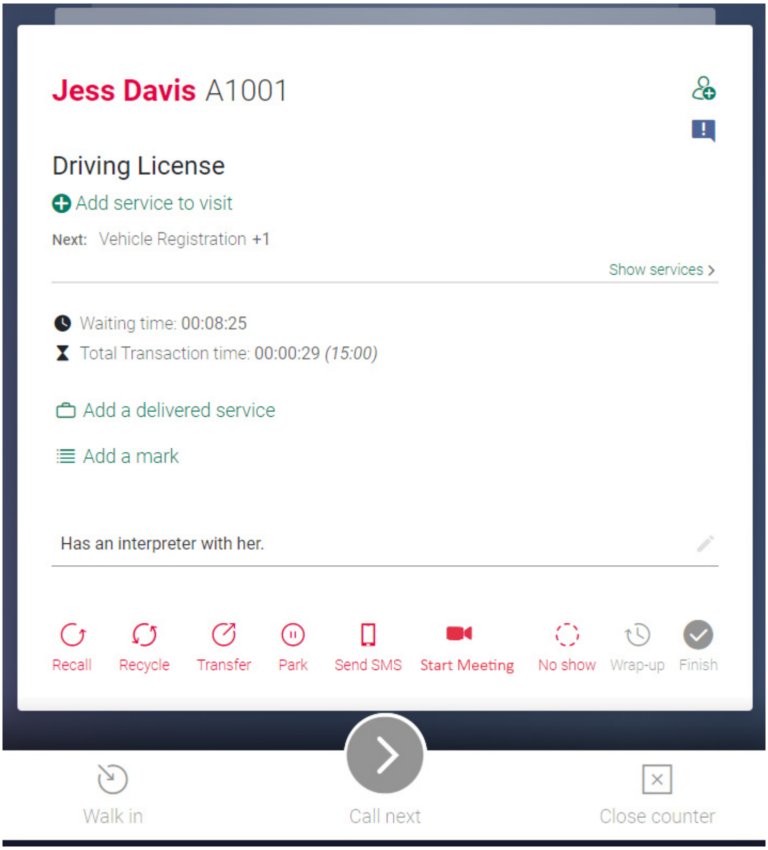


Handle the visit as you would handle any other visit.

3.4.4 Call from pool

You can also pick a visit from your pool to call. For more information about pools, see “ About pools” on page 21.

3.5 Working with the called visit - the visit card



The visit card contains the following information:

- **Customer name** – a plus sign indicates that 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.
- **Service transaction time**: the transaction time for the current service. This is only displayed if you select a service to serve from the visit card.
- **Total transaction time** – the total time since the transaction started. Here, your system may also be configured to show the expected transaction time in parenthesis.
- **Notes** – the notes for the visit, if available. You can also add notes here. See “3.5.1 Adding and editing notes for an ongoing visit” on page 11.

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

- **Add customer** : Add a customer or edit the customer information. See “3.5.2 Adding a customer and edit customer information” on page 11.
- **Add service to visit** : Add another service or turn the visit into a multi-service visit. It is also possible to delete services here. See “3.5.3 Adding/editing services” on page 13. 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.
- **Show services**: Show additional services connected to the visit. It is also possible to select a service to serve here. For more information, see “3.5.4 Show services and select a service to serve” on page 14.
- **Add delivered service** : Add a delivered service. For more information, see “3.5.5 Adding a delivered service” on page 15.
- **Add mark** : Add a mark. For more information, see “3.5.6 Adding marks” on page 16.
- **Add outcome** : Add an outcome. For more information, see “3.5.7 Adding outcomes” on page 17.
- **Recall** : Call the visit again, see “3.5.8 Recalling a visit” on page 18.
- **Recycle** : Place the visit back in the queue, see “3.5.9 Recycling a visit” on page 18.
- **Transfer** : Transfer the visit, see “3.5.10 Transferring a visit” on page 18.

- **Park** to park the visit in your pool, see "3.5.11 Parking an ongoing visit" on page 21.
- Send **SMS** **:** Send an SMS to the customer with a link to Mobile Ticket.
- **Start Meeting**: Start remote meeting with customer through Microsoft Teams or other meeting platform.
- **No show** : Set the visit as No show, see "3.5.13 Setting a visit as No show" on page 22.
- **Wrap-up** : Add wrap-up time to the visit, see "3.5.14 Wrapping up the visit" on page 22.
- **Finish** : Finish the visit, see "3.6.1 The Finish button" on page 23

3.5.1 Adding and editing notes for an ongoing visit

Notes may already have been added when the visit was created. 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 the visit is closed.

3.5.2 Adding a customer and edit customer information

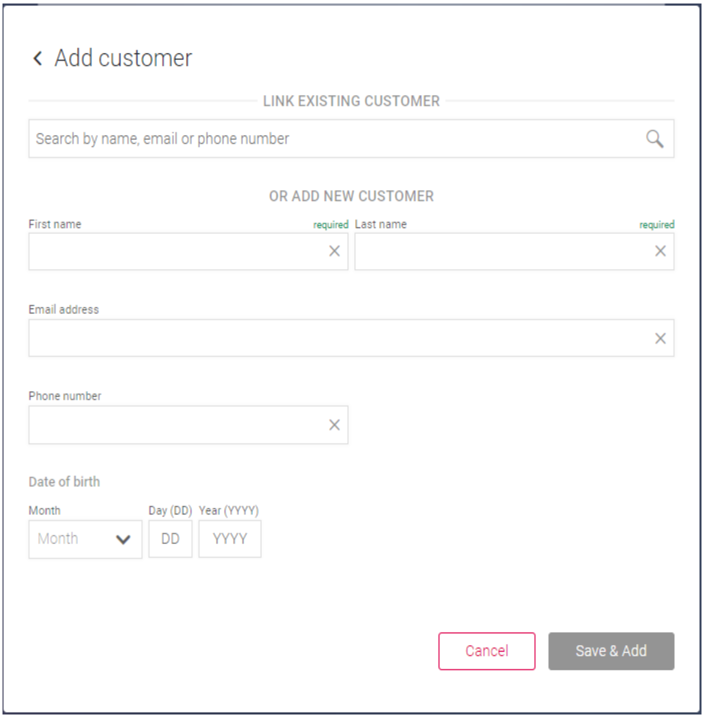
By linking a customer name to a visit after the visit has been called, the coming transactions, if any, will show the name of the customer with that visit number.

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. The search 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 name to select the customer.
5. Click **Save & Add** to link the customer to the visit.

Add new customer

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

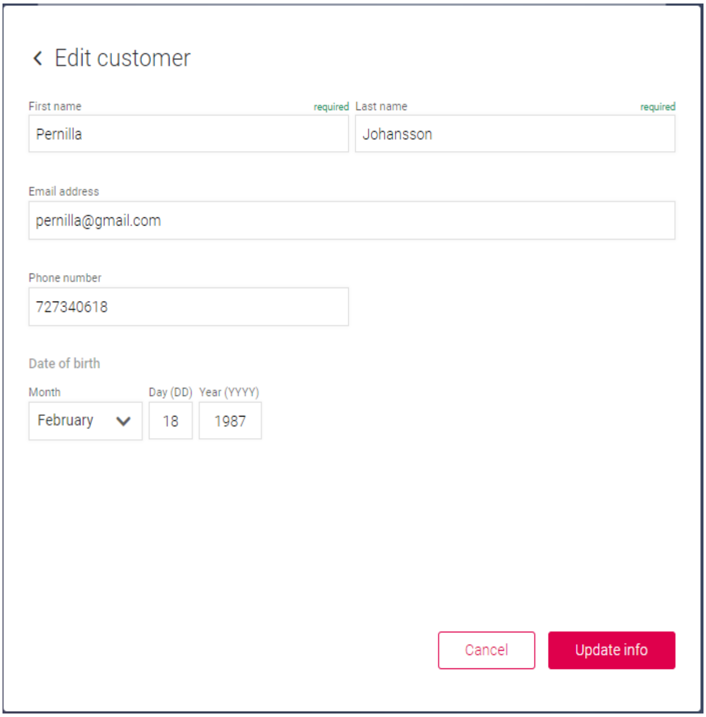


2. Fill in the customer details:
   - First name - required
   - Last name - required
   - Email address
   - Phone number
   - Date of birth
3. Click **Save & Add** to add the customer to the visit.

Edit customer information

1. Click the name of the customer, on the visit card, next to the visit number.

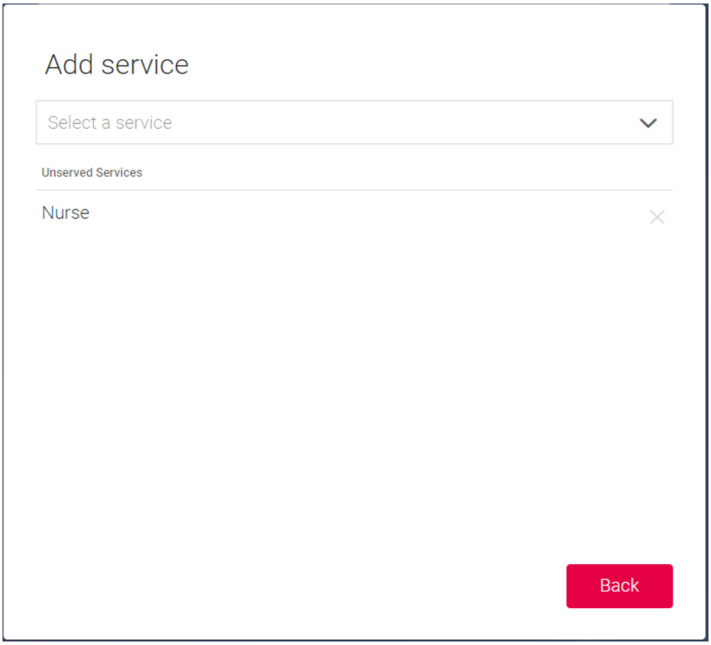
   The Edit customer window will be displayed:



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

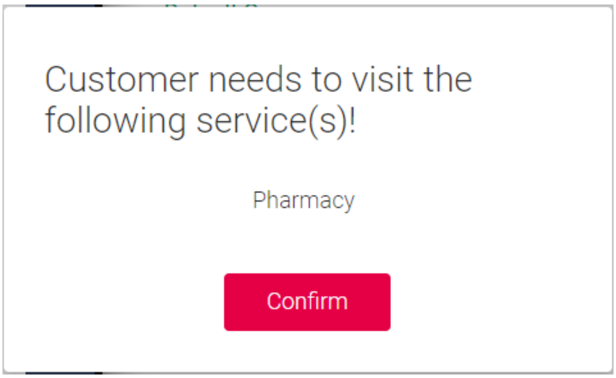
3.5.3 Adding/editing services

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



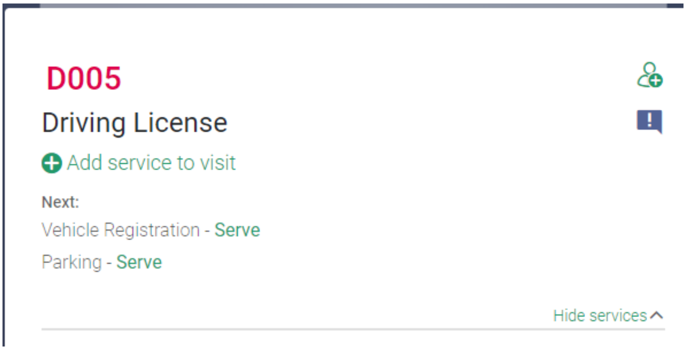
Here, you can select a service from the drop-down list. Unserved services will be listed and it is also possible to delete them from the list.

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



3.5.4 Show services and select a service to serve

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



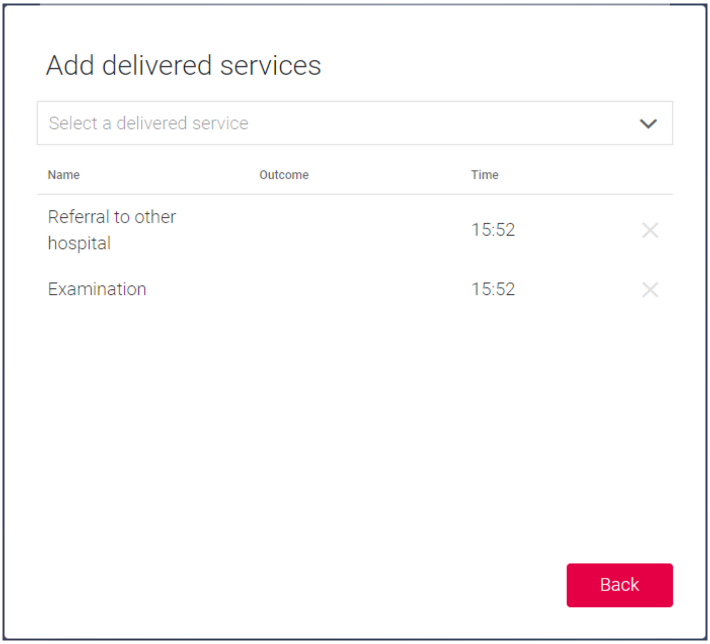
Click **Serve** to select a service to serve. This action will end the current service which means that if a delivered service/outcome is required, you have to add that first. A message confirming which service you are currently serving will be displayed.

3.5.5 Adding a delivered service

If a delivered service has been connected to this service, it *must* be added, before 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 window is displayed:



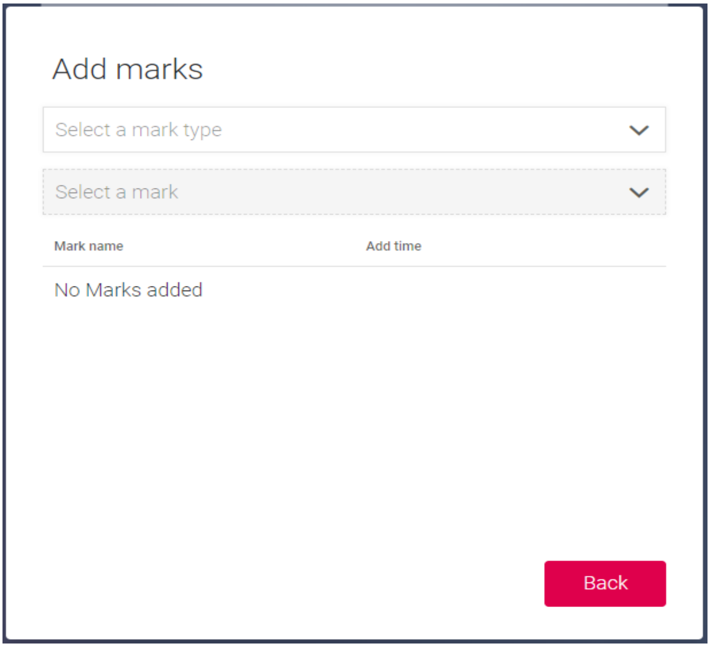
Here, you can search for a delivered service to add. If there is an outcome connected to the delivered service, you can select that here too.

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

It is also possible to delete delivered services.

3.5.6 Adding marks

Depending on how your system is set up, it may be possible, or even mandatory, for you to add marks to the ongoing visit. This is done by clicking the **Add marks** icon . 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.

3.5.7 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 “3.5.5 Adding a delivered service” on page 15.
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.

3.5.8 Recalling a visit

If a customer does not respond to the initial call for service, the Recall feature allows 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 transaction and for a visit that has not yet been closed.

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

3.5.9 Recycling a visit

If a customer does not respond to the initial call for service, or for any other reason you want the customer to be called again later, the **Recycle** icon allows you to put that visit back into the queue at the first position. The visit can, however, not be called until a certain time has passed. Default delay time is 60 seconds, but it can be changed in system settings.

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

3.5.10 Transferring a visit

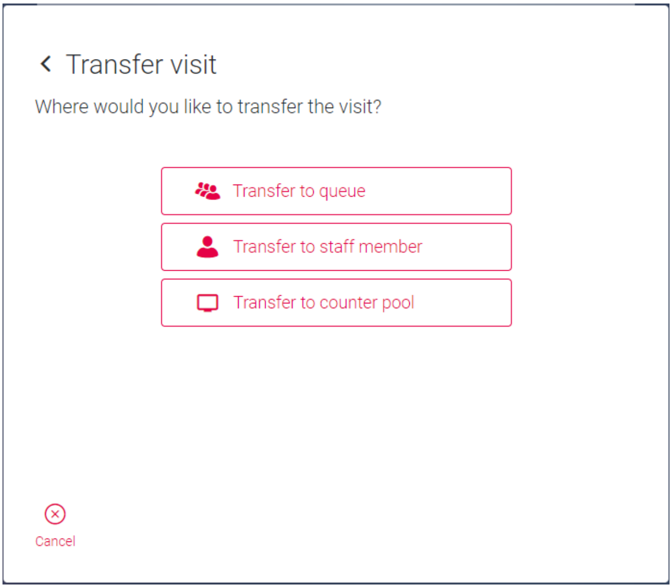
Use the Transfer feature to transfer a visit between queues, staff members or counters.

When transferring to a staff member or a counter, the visit will end up in their pool. For more information about pools, see “ About pools” on page 21.

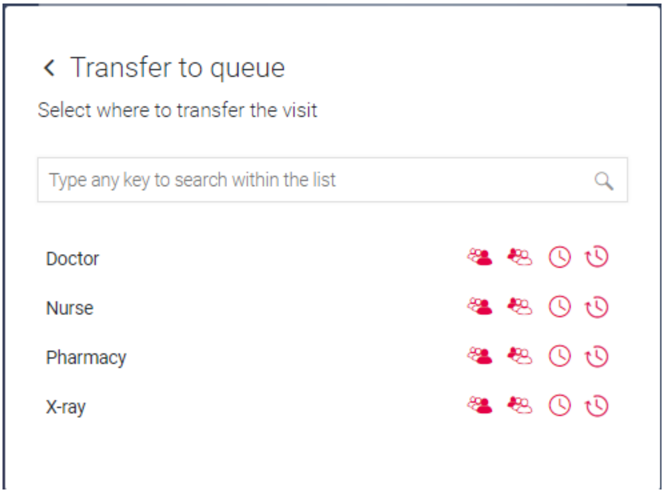
This feature is useful when multiple employees need to serve the same customer, or when a customer for example needs to fill in a form before being served again.

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.

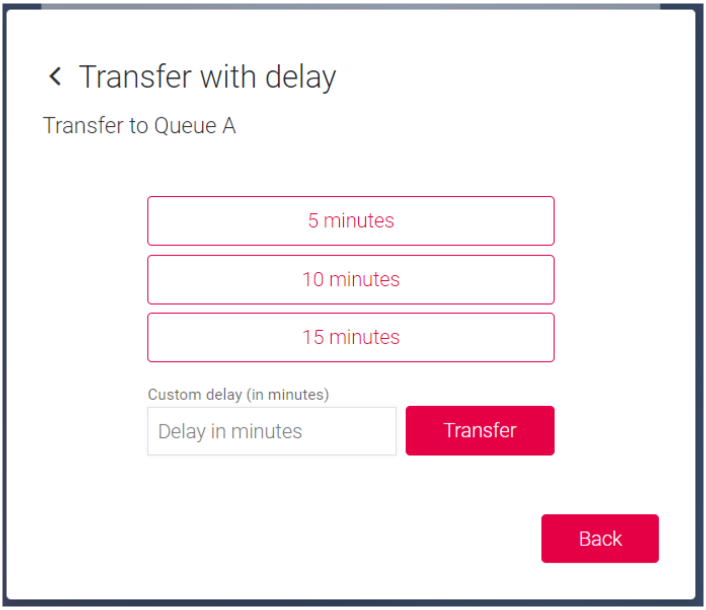
1. Click the **Transfer** icon in the visit card, or click on the visit in the queue view. Decide if you want to transfer to a queue, a staff member, or a counter pool:



2. Select a queue, counter or staff member to transfer the visit to. For queues, select if you want to transfer the visit first in line, last in line, based on visit lifetime or with a delay.

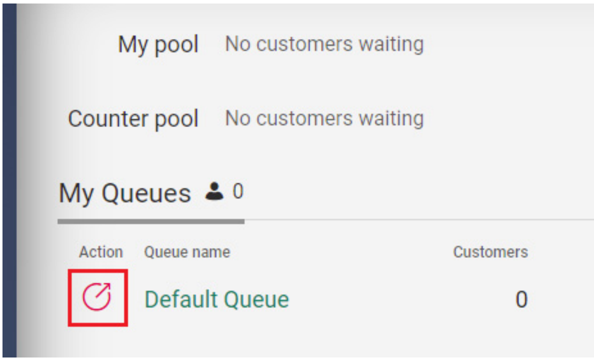


If you select **Transfer with delay**, the visit will be visible in the selected queue or pool after a chosen number of minutes. You can either select one of the default options presented, or enter any number of minutes in the input field:



One-click transfer

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



Note that you can only do a one-click transfer to non-appointment queues.

3.5.11 Parking an ongoing visit

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

About pools

Pools are similar to queues, but are used when customers need to be put on hold or parked aside the predefined customer journey. You may need to let a customer for example fill in a form and meanwhile continue serving the next customer.

There is one counter pool connected to each counter.

Visits can not be created directly in a certain pool, instead the customer must be transferred to the staff pool or counter pool.

The customer can later be called automatically from a pool and customers in a pool that does not have a certain order.

Pools may be connected to a certain work profile.

3.5.12 Send SMS for ongoing visit

If Mobile Ticket is used, you can offer the customer to follow the visit online even if they have a paper ticket. This is done by sending an SMS with a link to Mobile Ticket. There are two places where you can send an SMS:

- For a visit that has not been called yet, locate the visit in the queue view, click on it, and then select the option **SMS ticket**.
- For a called visit, you can select the option **Send SMS** in the visit card.

Enter the customer's phone number and click **Send.** The customer will receive an SMS with a link to Mobile Ticket where they can see their position in the queue etc.

3.5.13 Setting a visit as No show

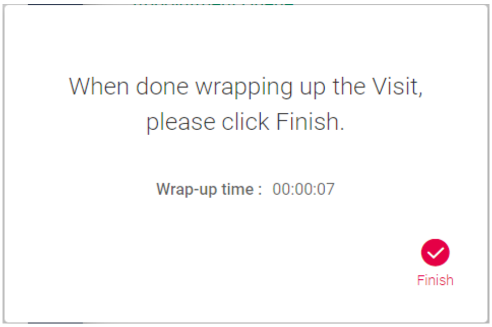
If a customer is called for service and does not show up, you can recall the visit by clicking the button for it, see "3.5.8 Recalling a visit" on page 18. If still no customer appears, you can register the visit as a no show. The system then records no shows in the statistics, allowing management to track missed visits with the completed transactions.

To register a visit as a no show, click the **No show** icon. The visit is saved in the statistics and closed.

3.5.14 Wrapping up the visit

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

Click the **Wrap up** button. The following window is displayed:



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

3.6 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 not possible to complete a transaction unless a an outcome and/or delivered service is assigned.

3.6.1 The Finish button

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

3.6.2 Closing the counter

The **Close counter** feature ends the transaction of the customer that you are currently serving and closes your counter session.

3.7 Accessibility features

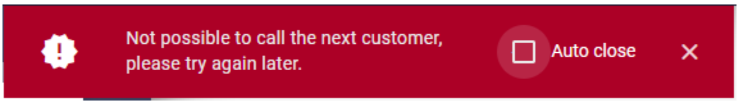
To make Counter accessible to people with disabilities, efforts have been made to make Counter meet the standards of WCAG 2.1. This section presents some accessibility features that could need some extra attention.

3.7.1 Tabbing and shortcuts

- You can use the tab key to move between different objects. Use **tab** to move to the next object and **shift+tab** to move to the previous object.
- Use the **arrow keys** to move between different list items within an object.
- In the header, there is a possibility to use a tabbing short-cut to get directly to the content. On the start page, just press **tab,** and then **enter** to go directly to that object.
  - First short-cut links to **Visit card**
  - Second short-cut links to **Action panel**

3.7.2 Prevent pop-up messages from disappearing

In Counter, there are several messages that appear as so called toasts. They can be either error messages (red) or success messages (green). To make sure everyone has time to read the toasts, they have an auto close functionality that can be turned on or off:



- Uncheck the auto close check box (default) to make the toast remain until you click the x to remove it. Maximum number of open toasts is 3.
- Check the auto close check box to make the toasts disappear automatically after 5 seconds.

The auto close setting is saved in a browser cookie.

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