

**cleverQ**

**Setup and Management**

**Customer and Site Admins**

## **Imprint**

cleverQ Setup and Management

For audience

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# 1 Welcome to the administration interface

Welcome to the cleverQ administration interface.

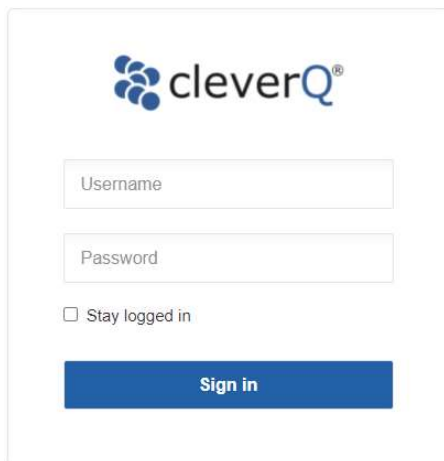
The administration interface is a web application. Therefore, you do not need to install any special software on your computer to access the administration interface. Any computer with a current web browser and internet access will do.

---

## Login

You can obtain the required login address (login URL) and your user name and password from your system administrator.

- 1 Enter your login address into the address bar of your web browser.  
→ The cleverQ login page appears.



*Tip: Bookmark this page in your web browser to avoid having to enter the login address manually in the future.*

- 2 Enter your user name and password on the login page.

*Tip: If you are the only person using the computer, additionally enable the option **Remember me**. You will then no longer have to re-enter your user name and password each time you log in in the future. Important: If other persons are also using the same computer, note that with saved login data, these persons may be able to log in to cleverQ under your name and with your user rights. Do not use the **Save login** option in this case!*

*Note: Also note that login data is stored in cookies on the computer. If your web browser is set to generally not save cookies, if you open the page in an "incognito" or "private" window, or if you delete the browsing history and thus the cookies after exiting cleverQ, saving the login will not work.*

→ The cleverQ user interface appears. The exact page that opens depends on your individual user rights in cleverQ.

### The range of functions depending on your user rights

In order to only display the functions that you actually need for the tasks you are to perform, cleverQ works with a multi-level role model. This means: Depending on your own user role, you may not see all the settings and functions that are generally available in cleverQ, or you may not be able to execute all the functions that are generally available.

This version of the documentation describes only the functions available to you according to your user role. However, the documentation may mention or refer to some functions that are not accessible to you.

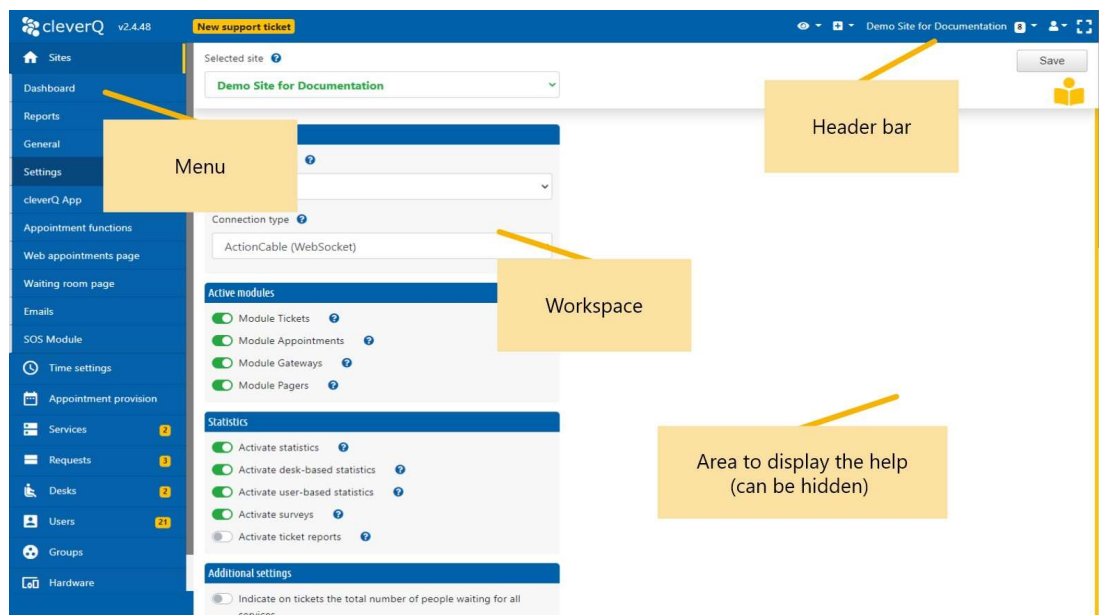
If you require settings or functions beyond the scope available to you, please contact the system administrator responsible for you.

### Optional modules and functions

cleverQ also has various optional modules. If you are unable to access any of these functions but require them, please contact your cleverQ distribution partner.

### Elements of the administration interface

The administration interface contains a side menu to the left of the workspace and a header bar with additional selection items.



*Tip: You can use the "Expand" symbol in the header bar to reduce the size of the left menu if necessary, thereby expanding the workspace accordingly.*

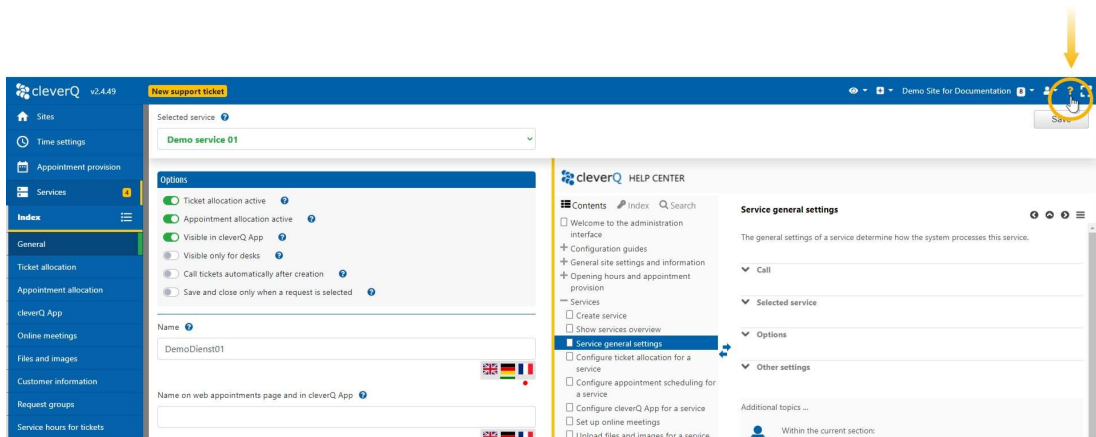


## Get help

The administration interface features a context-sensitive help function.

### Show help for a program page

To display the corresponding help page for a particular program page, click the question mark near the upper right corner of the header bar.

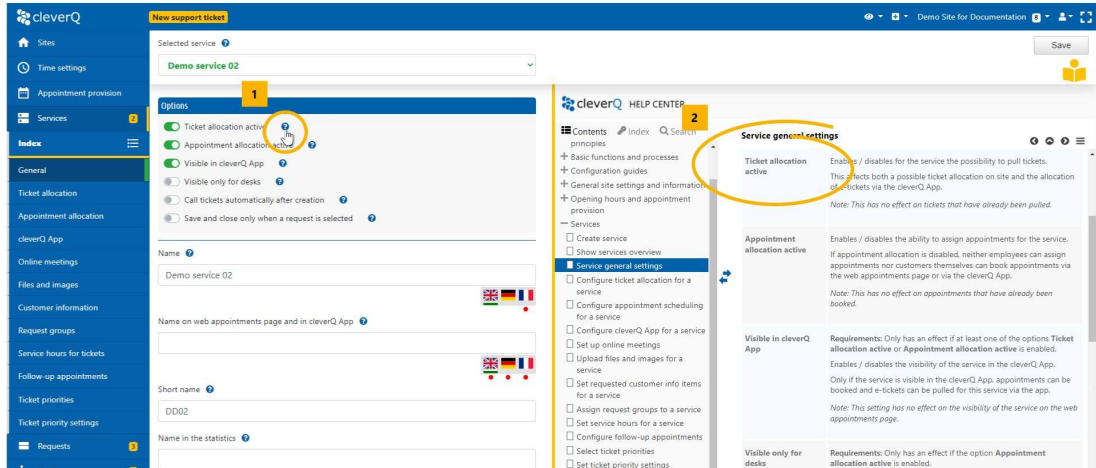


→ The help page describing the steps and parameters to be performed on the page appears.

*Tip: If necessary, you can also access other help topics from here. Use the links contained in the text as well as the table of contents, the index, and the search function.*

### Show help for a particular parameter

You can find a small button with a question mark directly next to most parameters. If you click this button, the help automatically jumps directly to the description of exactly that parameter (if the help is not yet open, the help also opens automatically).

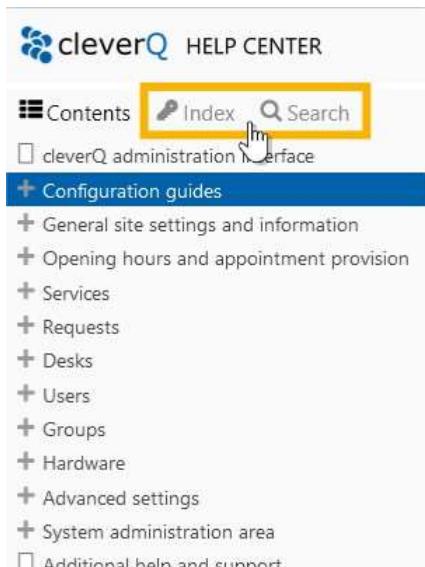


### Show and hide table of contents, index and search of the help

By clicking the arrows at the left edge of the help, you can display the table of contents of the help.

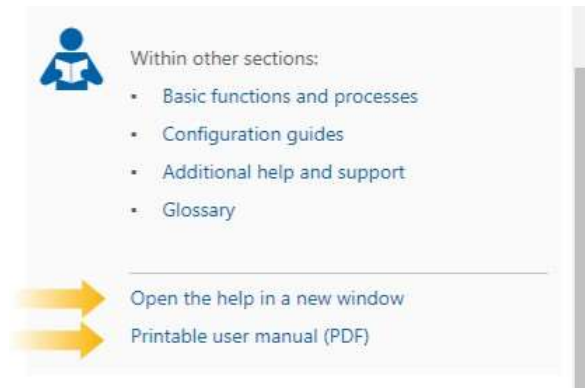


There you will also find an index and can search the help.



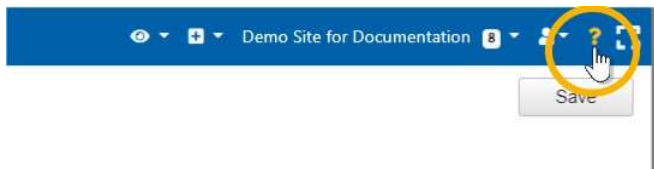
### Open help in new browser window

To comfortably read longer sections in the help, you can find links at the end of each topic that allow you to open the help in a new browser window or as a printable PDF file.



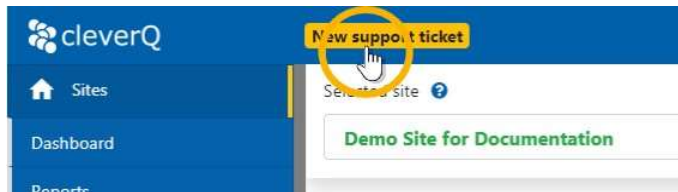
### Hide entire help again

To hide the entire help again, and thus to regain more space and clarity in the cleverQ administration interface, click the question mark in the header bar a second time.



### Support

In case you do not find the needed information in the help or if you have any special requirements or questions, you can easily contact support directly from the user interface. To do so, click the **New support ticket** button on the header bar.

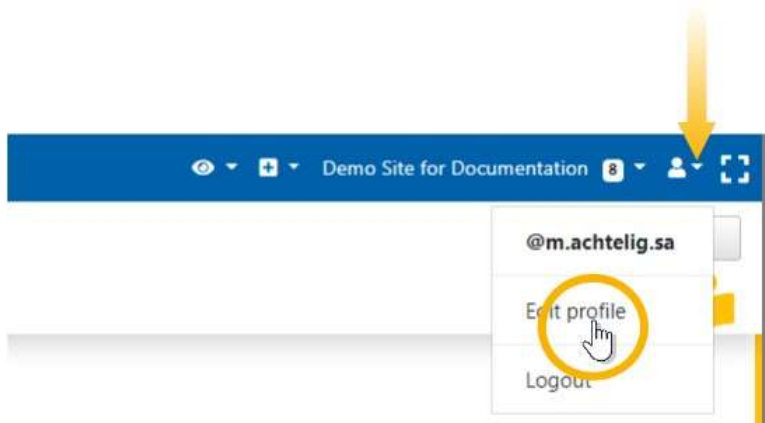


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### Edit your own user profile

You can change your most important personal system settings yourself at any time. This includes, in particular, the language in which the cleverQ user interface is displayed to you.

- 1 Click the "User" symbol in the header bar.
- 2 Select **Edit profile** in the menu that appears.



---

### Select location

If your organization runs multiple sites and you have the required user rights, you can and must select which site you are currently configuring in the administration interface.

In the header bar you can see which site is currently being configured.



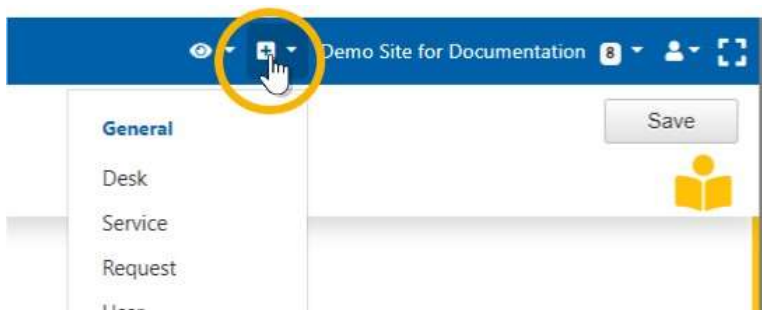
To change the site if needed:

> Click the site name in the header bar, and then select the site that you want to configure in the menu that appears.

---

### Create new objects

To create new objects immediately, you can find the "Plus" symbol in the header bar.

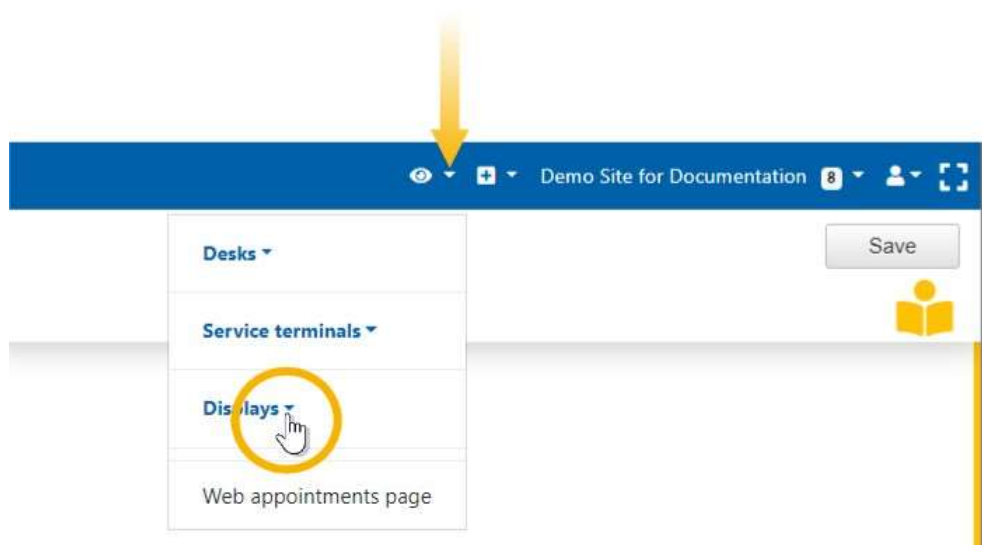


*Note: Alternatively, you can also create most objects via a button on the respective overview pages. Example: You can create a new service either via the "Plus" symbol in the header bar or under the menu item **Services > Index** via the **New Service** button.*

### Use preview functions

When configuring cleverQ, you specify settings for various pages, such as desks, displays, touchscreens and the web appointments page.

You can preview the respective pages at any time. To do so, click the "Eye" symbol in the header bar of the administration interface and then select the desired page in the menu that appears.



**Tip for implementation:** If you right-click the respective entry in the menu, you can open the preview on a new tab or in a new browser window without leaving the administration interface. In this case, however, note that you must reload the preview page after changing the configuration so that the new version of the page in question can be displayed correctly. To do this, use the **Reload page** or **Refresh** function of your browser.

**Tip for implementation:** In some places and situations, it may also be necessary or helpful to display the preview in a browser or browser window in which you are not logged in with your current user rights. Example: You want to test a desk from the perspective of a specific user.

There are two ways to achieve this:

- Open page in another browser:  
Right-click the respective entry in the menu, then select **Copy link** or **Copy link address** depending on the browser. Open a third-party browser and paste the link from the clipboard into the address bar of that browser.
- Open page in an "incognito" or "private" window:  
Right-click the relevant entry in the menu, and then select Open link in **Open link in incognito window** or **Open link in private window**.

---

### Enter texts in multiple languages

If you want to give your customers the option of switching languages (optional), you must enter certain texts in multiple languages in the configuration, such as the names of services and requests.

For this purpose, there are corresponding multilingual input fields in the administration interface. You can recognize these fields by the flag symbols below the respective field.

Save and close only when a request is selected ?

Name ?

Demo service 02

UK Germany France

Name on web appointments page and in cleverQ App ?

By clicking the respective flag, you select the language currently entered in the field. Below the flag, a **green bar** indicates that this language is currently displayed and being edited.

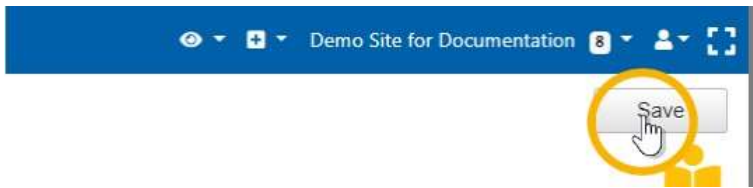
Languages for which no text has yet been entered are indicated by a **red dot** below the corresponding flag.

---

### Save entries

If you make changes to the configuration, these changes are automatically saved and active in some places.

However, you must explicitly save most settings for cleverQ to apply them permanently. To do this, you will find a **Save** button at the top right of most pages.



**Important:** Don't forget to click this button (if available). Otherwise, your changes will not be applied and will be lost.

**Important:** In some places, saving can also have effects within the page. For example, certain options may not appear until another option is selected and then saved.

## 2 Configuration guides

cleverQ offers you a wealth of parameters and configuration options.

If you are configuring cleverQ or a particular cleverQ function for the first time, you probably do not yet know where to find the relevant settings and which parameters to start with. The guides in this section will help you here.

- The guides provide a **collection of the parameters relevant for a specific task group** – even if these parameters are located in different places under different menu items in the administration interface. (Example: Some settings for tickets depend on the site, while other settings depend on services or relate exclusively to the cleverQ App. These settings are therefore located under different menu items in the administration interface. The "Ticket functions" guide provides you with an overview of all these places and parameters so that you can proceed in a targeted manner during configuration and do not overlook something important).
- If relevant, the guides also show you the best **order** in which to proceed with the respective configuration.

To keep the guides clear, they have deliberately been made as concise as possible. You can obtain details on the individual parameters mentioned in the guides via the context-sensitive online help by clicking the "Question mark" symbol next to the relevant parameter in the administration interface.

*Tip: It is best to open the respective guide in a new browser window or on a new tab of your browser. You can then keep it open permanently and use it in parallel with the context-sensitive help.*

Topics in this section:

- [Guide – Setting up a site for the first time \(overall process\)](#)
- [Guide – Users and user rights](#)
- [Guide – Opening hours and other time settings](#)
- [Guide – Services, requests, groups](#)
- [Guide – Ticket functions](#)
- [Guide – Appointment functions](#)
- [Guide – Settings for the CleverQ App](#)
- [Guide – Custom design](#)
- [Guide – Individual info documents and info links](#)
- [Guide – Foreign language and multilingual configurations](#)

- [Guide – Desks](#)
- [Guide – Surveys](#)
- [Guide – Waiting lists](#)
- [Guide – Dashboard, reports, statistics](#)

## 2.1 Guide – Setting up a site for the first time (overall process)

In general, you are not bound to any specific sequence when configuring cleverQ.

However, since some things can only be selected once certain other things have already been created, we roughly recommend the following sequence. You will then not need to return to the same places several times during configuration.

*Note: Essentially, these steps correspond to the order of the main menu items in the administration interface from top to bottom.*

Recommended order:

- 1 Plan which services you will offer and (optionally) which requests. If the number of services or requests is very large, consider combining them into services groups and request groups (see [Guide – Services, requests, groups](#)).
- 2 Create the site, if not already done (can only be created by users of certain roles).
- 3 Configure the essential site settings under **Sites > General** and **Sites > Settings**.

*Note: Under the **Sites** menu item, there are also menu items for configuring the web appointments page, the cleverQ App, and emails. However, wait with this until a few more things have been configured. Only then can you also test the effects of your settings regarding the web appointments page, the cleverQ App, and the emails and thus check whether the settings result in the desired output.*

- 4 Create the planned services (can only be created by users of certain roles) and configure them under the menu item **Services**. This is a prerequisite for you to be able to assign requests to services later. You will also need the services later to be able to configure the appointment provisioning.
- 5 Create the planned requests (can only be created by users of certain roles) and configure them under the menu item **Requests**.
- 6 Define the opening hours of the site under the **Time settings** menu item.
- 7 Create one or more schedule templates under **Appointment provision > Schedule templates**.
- 8 Create a weekly schedule and provide appointments under **Appointment provision > Weekly schedules** (see [Create weekly schedules](#)).
- 9 Now that services and requests have been configured and initial appointments have been made available for testing purposes, it makes sense to configure the web appointments page, the cleverQ App, and the emails under the menu item **Sites** (menu items **Sites > Web appointments page**, **Sites > cleverQ App**, and **Sites > Emails**).
- 10 Under the menu item **Users**, create user accounts for the persons who will be working with cleverQ within your organization.

- 11 Create the required desks (can only be created by users of certain roles) and configure these desks under the menu item **Desks**. In doing so, also assign the previously created users to the desks under **Desks > Users**. Under **Desks > Services**, assign the previously created services to the desks.
- 12 If this has not already been done by support or by your cleverQ distribution partner, configure the hardware components used under the menu item **Hardware**.
- 13 Put the system into operation, test it, and make further adjustments if necessary. When the system is working properly, add more features as needed, such as alarms and the necessary desk groups (configurable only by users of certain roles) or surveys (configurable only by users of certain roles).

## 2.2 Guide – Users and user rights

A user in the sense of cleverQ is an individual person who sets up, configures, or uses cleverQ on a desk. A user is not to be confused with a customer. Customers are the actual end users of cleverQ. Users run cleverQ for their customers.

While there is no special login for customers with rights management attached to it, each user has a personal user name and password.

---

### Rights according to role

Under **Users > General**, a specific user role is assigned to each user in the **Role** parameter. This role essentially determines which things the user can see and configure in the cleverQ *administration interface*, or whether the user does not even get to the cleverQ administration interface, but only directly to one or more desks.

---

### Rights on individual desks

Many of the things that a particular user can see and do in cleverQ at runtime do not depend on the user's role, but on the rights of the individual desks that the user can access. Specifically, these rights tied to desks are configured under:

- **Desks > General permissions**
- **Desks > Service-dependent permissions**
- **Desks > Additional settings**

See also [Guide – Desks](#).

The users who are allowed to use the desk are assigned to each desk under **Desks > Users**.

---

### Other places affected by rights assignments

- Some user rights are directly linked to the respective user account under **Users > General**:
  - **Receives appointment confirmation emails**
  - **May view user-specific statistics**
  - **May view appointments of all sites**

- By default, users assigned the *Site admin* role can only access one or more sites that have been permanently assigned to them. However, under **User > Sites**, such users can be assigned additional sites at any time, which the users are then also allowed to configure. Users who are assigned the role *Tenant admin* or *Super admin* can always access *all* sites in an organization.
- Whether a specific user is notified in the event of an alarm depends on whether the user is currently using a desk that is assigned to the same alarm group as the desk on which the alarm has been triggered.
- Whether a specific user appears in the statistics is determined by the **Appears in the statistics** parameter under **Users > General**.

## 2.3 Guide – Opening hours and other time settings

For allocating appointments, for making tickets available and for calculating expected waiting times, the opening hours of the site, any deviating opening hours of individual services, public holidays, special days and various other settings are important.

The following places in the configuration affect the time settings:

---

### Site opening hours

Under **Time settings > Opening hours**, you enter the regular opening hours of a site for each day of the week.

---

### Public holidays and exception days

Public holidays are specified by the system. You can get an overview of these holidays under **Appointment provision > Holidays**.

cleverQ automatically determines which holidays apply to a particular site based on the address data of the site entered under **Sites > General**.

If there are any deviations from this – for example because a site is open despite a public holiday, because it is open on a particular Sunday, or because it is exceptionally closed on a certain business day – you can define so-called exception days for this (menu item **Appointment provision > Exception days**; if no exception day has been defined yet and this menu item is therefore not selectable, see notes under [Define exceptions for the appointment provision](#)).

---

### Special service times for particular services

If required, you can individually specify for each service at which times you offer this service to your customers under **Services > Service hours for tickets**. Deviating from the general opening hours of the site, customers can then request tickets and e-tickets for the service in question only within the time periods specified here. However, this only applies if the option **Use site opening hours** has been disabled under **Services > Ticket allocation**.

*Note: These settings only affect tickets. Appointments are assigned via appointment provision and are independent of this.*

---

### Times for ticket allocation

The times during which customers can request tickets and e-tickets can be further restricted within the opening hours of the site and within the service hours of a specific service.

Under **Sites > Settings**, you can use the parameters **Start issuing tickets before opening time** and **Stop issuing tickets before closing time** to shift the ticket issue time.

---

### Appointment slots for ticket allocation

An appointment slot is the smallest time unit that can be used for a service or for a request. Example: Customer requests are to be scheduled in blocks of 5 minutes each. In this case, an appointment slot lasts 5 minutes. If an appointment takes 15 minutes, for example, the appointment needs 3 appointment slots.

In order for appointments to be booked via the web appointments page or via the cleverQ App, free appointment slots must be available. Appointment slots can generally only be provided for times that fall within the opening hours of the site, taking into account any public holidays and exception days. You are free to determine how many appointment slots are made available.

The provisioning of free appointment slots takes place within the framework of a weekly schedule (menu item **Appointment provision > Weekly schedules**).

Each weekly schedule is in turn based on a schedule template, which must have been created beforehand under **Appointment provision > Schedule templates**. The schedule template determines at which times on which days of the week appointments can be booked as well as the maximum number of appointments that can be booked.

A schedule template always covers exactly one week, but appointments do not have to be available on every day. For each day of the week from Monday to Sunday, different times and appointment slots can be available. Therefore, each day of the week is defined individually in the schedule template.

If necessary, you can create as many schedule templates as you like. In many cases, however, a single schedule template for normal weeks is sufficient, supplemented if necessary by a few special schedule templates for special weeks with any special features (examples: Week in which one day is closed for a company outing; Week in which it is exceptionally open even on Sunday).

If weekly schedules have been created, the provisioning of the dates is automatic. The values of the following parameters determine this under **Services > Appointment allocation**:

- **Provide entire weeks**
- **Period for automatic appointment provision**

- **Appointment slot interval starts on hour**
- **Appointment slot interval starts on minute**
- **Appointment slot interval**

The Appointment **Slot Procedure** parameter under **Sites > Appointment Functions** also determines whether and how cleverQ assigns appointment slots among individual services.

The **Appointment slot duration** parameter under **Sites > Appointment functions** determines the size of the time blocks used in scheduling and appointment allocation.

If you do not want to wait for automatic appointment provisioning until appointments are bookable, you can alternatively trigger appointment provisioning manually at any time (see [Create weekly schedules](#)).

---

#### Further timing specifications

- For services, there is the parameter **Processing time** under **Services > General** with the average expected processing duration (multiple of the appointment slot duration) provided for processing appointments. This value is taken into account when assigning appointments.
- For services, there is also the parameter **Average processing time** under **Services > Ticket allocation**. This value, together with the parameter **Mode used for calculating waiting times** is used to calculate the predicted waiting time displayed in the cleverQ App.
- For requests, for scheduling there are the parameters **Initial duration** and **Subsequent duration** under **Requests > General**.
- For desks, under **Desks > Additional settings**, there are the parameters **Time limit for status "desk is offline"** and **Time limit for access after ticket call** (configurable only by users of certain roles).

## 2.4 Guide – Services, requests, groups

Essential elements in cleverQ are services, requests and (optionally) services groups and request groups.

---

### Services and requests

A *service* represents a specific organizational unit (such as a department) or service area within an organization.

Examples:

- Government office with the services: *citizens' office, registry office, public order office, vehicle registration office.*
- Bank with the services: *credit counseling, investment counseling, account matters.*

One or more *services* can be assigned to a service, which the service provides for the customers of the organization. Example: *Requesting an identity card or registering a change of residence* in the *Citizen's Office* service.

---

### Services groups and request groups

Optionally, you can combine services and requests into corresponding groups:

- With *services groups* you can combine several services. On the web appointments page (but not in the cleverQ App), the individual services then appear grouped according to these services groups.

If *inMode* is disabled on desks (**Use inMode desk design** parameter under **Desks > Visual settings**), the services groups will also appear there on the ticket creation page.

- You can use *request groups* to group multiple requests at a time. On the web appointments page and in the cleverQ App, the individual requests then appear grouped by these request groups.

---

### Management groups

Optionally, services and users with the role appointment admin can be assigned *management groups*.

- Appointment admins can then upload schedule templates under **Appointment Provision > Weekly Schedules**.

---

### Hierarchical structure

Overall, services, requests, and their respective groups result in the following hierarchical structure:

- Requests (optionally) belong to a request group.
- The request group (or in its absence, the requests directly) belongs to a service.
- The service (optionally) belongs to a services group.

This structure also results in the optimal order when creating services, requests, services groups, and request groups (see [Guide – Setting up a site for the first time \(overall process\)](#)).

---

### What happens if ... are not defined?

- At least one service must always be defined.
- The definition of requests is optional. If no request is assigned to a service, appointments can be booked directly for the service. Tickets are always pulled for a service anyway, regardless of whether requests are defined for that service or not.
- Services groups and request groups are also optional. If they are not defined, they are missing from the hierarchy and do not appear for selection.

---

### Configuration of services

- Services are primarily defined under the menu item **Services** with its various sub-items (for descriptions see [Services](#)).
- Under **Services > Request groups** you also assign request groups to a service, if such request groups have been defined.
- However, you do not determine which requests belong to a service in the services, but in the requests under **Requests > Services**.
- The parameter **Show services selector** under **Sites > Web appointments page** determines whether the services are displayed for selection on the web appointments page or directly the requests (if defined). For the cleverQ App, there is an equivalent option under **Services > General** with the parameter **Visible in cleverQ App**.
- You configure which services can be provided at a specific desk (and thus which requests assigned to the service, if any, can be provided there) under **Desks > Services**. In conjunction with the setting for which users are allowed to use the desk, this also indirectly determines which users can provide the service. Under **Desks > Service-dependent permissions** you can also configure special rights related to services.

---

### Configuration of requests

- Requests are primarily defined under the menu item **Requests** with its sub-items (for descriptions see [Requests](#)).
- Under **Sites > Appointment functions**, the **Use requests** option determines whether at the site customers are asked for the requests to be processed at all when booking appointments via the web appointments page or via the cleverQ App. Else, the appointments are booked directly for the respective service – even if requests are defined in the site's configuration. In this case, only the employee assigns the requests after meeting the customer (in order to thus record the relevant data for the statistics).

---

### Configuration of service groups

Services groups are defined under the menu item **Groups > Services groups** with its sub-items (only configurable by users of certain roles).

However, you do not specify which services belong to a services group here, but rather in the respective services under **Services > General** in the **Services group** parameter.

---

### Configuration of request groups

Request groups are defined under the menu item **Groups > Request groups** with its subitems (only configurable by users of certain roles).

There, under **Groups > Request Groups > Requests**, you also specify which requests belong to a particular request group.

## 2.5 Guide – Ticket functions

A ticket in cleverQ is a waiting tag. It can be a classic waiting ticket printed on paper or an electronic waiting ticket (e-ticket). Each ticket has a unique ticket number that appears on the display when the ticket is called. Optionally, a ticket may also contain a QR code, which can be used for automatic access control, for example.

Tickets can have certain states: There are closed tickets and active tickets. Active tickets can in turn be: waiting tickets, called tickets, or parked tickets (for details see [Glossary](#)).

Because tickets are one of the key components in cleverQ, there are many places and parameters in the configuration that affect tickets.

---

### Basic requirements

- In order to be able to issue and use tickets at all, the **Module Tickets** option must be enabled under **Sites > Settings**.
- In order for customers to be able to request tickets for a specific service, the **Ticket allocation active** option must be enabled for the service under **Services > General**.
- To enable customers to request e-tickets for the service via the cleverQ App, the option **Visible in cleverQ App** must also be enabled under **Services > General**. In addition, the option **Allow ticket requests** must be enabled under **Services > cleverQ App**. In this context, the parameter **Minimum number of active tickets** under **Services > cleverQ App** is also important. Customers can only pull e-tickets via the cleverQ App if there are more active tickets than specified here at any given time.
- Unlike the cleverQ App, the cleverQ Web App can be used without installation. For customers to be able to pull an e-ticket for a specific service via the cleverQ Web App, the QR code displayed under **Services > Ticket Allocation** in the **Browser ticket token** parameter must be made known to the customers. This can be done either in the form of a printout on paper that you post on site, or on a touchscreen.

---

### Specify the content visible on the tickets

- The parameter **Indicate on tickets the total number of people waiting for all services** under **Sites > Settings** determines whether the sum of all waiting customers of the entire site is specified on the tickets or only the sum of waiting customers of the service for which the ticket was requested.
- You can make settings for the structure of the ticket numbers if you enable the **Set individual ticket design** option under **Services > Ticket allocation**. In this case, the additional parameters **Ticket letter**, **First ticket number** and **Last ticket number** appear on the same configuration page.

- Under **Services > Appointment allocation** there are the parameters **Ticket code format** and **Ticket code prefix**. These parameters influence the structure of ticket numbers used by the system to queue appointments (appointments become tickets internally).

---

### Times and limits

- The time when the number count on the issued tickets is reset is selected in **Sites > Settings** in the **Reset time for tickets** parameter.
- The times of the day at which the issuing of tickets starts and ends can be configured under **Sites > Settings** in the parameters **Start issuing tickets before opening time** and **Stop issuing tickets before closing time**. To set the opening hours of the site and to set special opening hours of individual services, see [Guide – Opening hours and other time settings](#).
- To determine the maximum number of tickets that can be in circulation at the same time, use the parameter **Maximum number of active tickets** under **Sites > Settings**.

---

### Special settings for e-tickets

- Customers can only pull e-tickets via the cleverQ App if the option **Activate e-tickets module** has been enabled under **Sites > cleverQ App**.
- A customer can only request more than one e-ticket at a time via the cleverQ App (one e-ticket per service) if the option **Allow pulling multiple e-tickets** has been enabled under **Sites > cleverQ App**.
- The option **Maximum radius for being able to pull e-tickets** in **Sites > cleverQ App** can ensure that customers can only pull e-tickets if they are already in the physical vicinity of the site so that they can actually reach the site at short notice.
- The option **Maximum number of e-tickets per hour** in **Sites > cleverQ App** can limit the total number of e-tickets issued to ensure an appropriate balance between e-tickets and printed tickets pulled on site.
- In addition, a special option is the parameter **E-tickets can only be created via QR code** (only configurable by users of certain roles).

---

### Settings for calling and processing tickets

- How the system processes tickets in general is determined by the **Operational Mode** parameter under **Sites > Settings**.

- Under **Services > Ticket allocation** you can find various parameters which you can use to specify how much time cleverQ estimates for processing a ticket: **Average processing time**, **Mode used for calculating waiting times**, **Min processing time** and **Max processing time**.
- A special option is also the option **Call tickets automatically after creation** under **Services > General** (see [Service general settings](#)).
- For desks, there are various parameters under **Desks > General permissions** to define whether and how a specific desk is allowed to process tickets:
  - **Allow calling tickets**
  - **Allow creating tickets** (whether employees at a desk can create tickets for a specific service is additionally determined by the parameter **Allow creating tickets in this service** under **Desks > Service-dependent permissions**).
  - **Allow forwarding tickets**
  - **Allow closing tickets**
  - **Allow parking tickets**
  - **Automatically close tickets by calling next ticket**
  - **Calling strategy**
- If the option **Can control ticket output** has been enabled for a desk under **Desks > General**, the desk can enable and disable the output of tickets for the services assigned to the desk respectively. Likewise, the desk can completely enable or disable entire ticket printers.

---

### Ticket priorities

Ticket priorities can ensure that certain tickets are called preferentially. This shortens waiting times for the affected customers – for example, if an employee refers a customer to a colleague within the site or if there is some other valid reason that a certain customer should be called particularly quickly.

- In the first step, the possible ticket priorities have to be provided in general under **Advanced settings > Ticket priorities**.
- Specifically for individual services, you can then make some more settings under **Services > Ticket priority settings**.
- Under **Services > Ticket priorities** you set which ticket priorities the system should consider for a specific service.
- Which ticket priority a certain ticket finally gets is assigned to the ticket by the employee on their desk when creating or processing the ticket.

## 2.6 Guide – Appointment functions

An appointment in cleverQ is the time scheduled for processing one or more requests of a specific service. Appointments can either be booked by employees (web appointments page accessed from the desk) or by customers themselves (web appointments page or cleverQ App).

Because appointments are one of the central components in cleverQ, similar to tickets, there are many places and parameters in the configuration that affect appointments and their processing.

---

### Basic requirements

- In order to be able to assign appointments and to work with appointments at all, the **Module Appointments** option must be enabled under **Sites > Settings**.
- In order for customers to be able to book appointments for a specific service, the option **Appointment allocation active** must be enabled for the service under **Services > General**.
- For customers to be able to book appointments for a specific request, the request must have the **Allow booking of appointments** option enabled under **Requests > General**.
- As an alternative to on-site appointments, appointments for certain services can also take the form of online meetings. You can set this up under **Services > Online meetings**.

---

### Settings

- The central and most important place for configuring the appointment functions is the menu item **Sites > Appointment functions**. There you can specify in particular where and how appointments can be booked, and you can temporarily disable the appointment function as well as specify numerous processing settings (configurable only by users of certain roles).
- For individual services, you can make further settings for appointment assignment under **Services > Appointment allocation** (for details, see [Configure appointment scheduling for a service](#)).
- You define the design and behavior of the web appointments page under **Sites > Web appointments page** (configurable only by users of certain roles).
- You configure the emails sent by cleverQ to customers in connection with appointment bookings under **Sites > Emails** (configurable only by users of certain roles).

---

### Times and appointment provision

- Decisive for which days and times appointments can be booked at all are the settings under the menu items **Time setting** and **Appointment provision**.
- The parameter **Appointment slot generation mode** under **Sites > Appointment functions** determines whether and how cleverQ assigns appointment slots among the individual services.
- The parameter **Appointment slot duration** under **Sites > Appointment functions** determines the size of the time blocks used for scheduling and for appointment provisioning.

In this context, see also [Guide – Opening hours and other time settings](#).

A special case are services for which the booking mode *As needed* has been enabled under **Services > Appointment allocation**. Here, the appointment time is determined automatically and an appointment is always booked, regardless of whether free appointment slots are still reserved or not.

---

### Appointments with an appointment invitation

For special things that should not be generally bookable, you can provide that customers can only book an appointment for them if they receive a special invitation from an employee (for example in a phone call or during an initial appointment). However, employees can also send invitations for appointments that can be booked in the conventional way.

Overall, there are the following options for appointment invitations:

- under **Sites > Appointment functions**, the option **Appointment invitation needed**
- under **Sites > Appointment functions** the option **Appointment invitations expire after**
- under **Services > Appointment allocation** the option **Appointment invitation needed**
- under **Services > Follow-up appointments** the option **Booking mode**
- under **Desks > General permissions** the option **Allow sending appointment invitations**
- under **Sites > Web appointments page** the option **Show field for entering an invitation code**

In addition, as an alternative to an appointment invitation, there is still the option to allow appointment bookings for certain services only when a customer accesses the web appointments page via a specific link. To enable this function and to create the link, select the option **Non-public** under **Services > Appointment allocation**.

*Note: In addition, it is possible here to pre-fill customer information and make it read-only by appending parameters to the link. Each value you want to include, add according to the pattern `&parameter_name=parameter_value` to the end of the link. As a result, the complete URL looks like this, for example: `https://cleverq.de/public/sites/4/appointments/index.html?lang=de&given_name=Oliver`. In the form for entering personal data, the respective fields are highlighted in gray and cannot be changed by customers. The parameter names can be found under **Advanced settings > Customer information** in the Name column.*

---

### Follow-up appointments

A special form of appointments are appointments that automatically follow a previous appointment by a certain amount of time.

You configure such appointments specifically for an individual service under **Services > Follow-up appointments**.

Additionally, you need to enable the *As needed* booking mode for such services under **Services > Appointment allocation**.

---

### Display web appointment page

- From the administration interface, you can display the web appointments page by clicking the "Eye" symbol in the header bar and then selecting **Web appointments page** in the menu that appears.
- For customers, you should link the web appointments page from your own website.

---

### Permissions for desks

Under **Desks > General permissions** you can assign various rights for appointment management and for appointment booking for a desk in general.

For individual services, an additional, finer setting is also available under **Desks > Service-dependent permissions** with the option **Allow booking appointments at the desk**.

## 2.7 Guide – Settings for the CleverQ App

The majority of the settings for the cleverQ App are made under **Sites > cleverQ App**.

However, there are also a few other places in the configuration that influence the cleverQ App:

- Whether and which individual welcome text appears in the cleverQ App is determined by the settings made for the welcome text under **Sites > Web appointments page**. These settings also apply to the cleverQ App.
- The category under which a site appears in the cleverQ App depends on the **Tenant category** parameter under **Sites > Settings**.
- Service-specific settings for the cleverQ App can be made under **Services > cleverQ App**.
- Appointments can only be booked for a service in the cleverQ App if the options **Appointment allocation active** and **Visible in cleverQ App** are enabled for the service under **Services > General**. At the same time, the option **Visible only for desks** must *not* be active.
- E-tickets can only be pulled for a service in the cleverQ App if the options **Ticket allocation active** and **Visible in cleverQ App** are enabled under **Services > General** for the service. At the same time, the option **Visible only for desks** must *not* be active.
- For information on setting various options for the visual appearance of the cleverQ App, see [Guide – Custom design](#).
- For options that control which info files customers can access via the cleverQ App and which external websites the cleverQ App links to, see [Guide – Individual info documents and info links](#).

Also note that e-tickets can only be pulled during the opening hours of the site and service (see [Guide – Ticket functions](#)). Appointments can only be booked if appointment slots have been provided and free appointment slots are still available (see [Guide – Appointment functions](#)).

## 2.8 Guide – Custom design

At various points in cleverQ, you have the option of adapting the visual appearance of cleverQ to your own in-house design. This way, cleverQ fits seamlessly into your overall appearance.

The following overview summarizes the places where you can make corresponding design settings when configuring cleverQ.

*Note: In addition, you can also provide individual documents and links in some places. See [Guide – Individual info documents and info links](#) for more information.*

---

### Web appointments page

Under **Sites > Web appointments page**, you can customize the appearance of the web appointments page to a very large extent. Among other things, you can freely choose backgrounds, logo, symbols as well as colors there and also predefine many of the texts as you wish. If you wish to use special symbols for individual services, requests, services groups or request groups, you can set them in the general properties of the respective services, requests, services groups or request groups.

Under **Sites > Waiting room page** you can ensure that the web appointments page does not get overloaded by too many simultaneous requests.

---

### cleverQ App

The general design of the cleverQ App, such as its colors, is largely predefined. The reason for this is that customers can use the cleverQ App not only for your organization, but across a wide range of providers.

However, within the given framework you have various options here to present your own organization with individual images and symbols:

- Under **Sites > General**, you can use the parameter **Symbol used in the cleverQ App** to upload an image that appears in the following places in the cleverQ App:
  - in the list of providers that offer services via the cleverQ App
  - in the top right corner of the site page

The symbol is used regardless of whether appointments are booked or e-tickets are requested using the cleverQ App.

- Under **Services > Files and images**, you can specify an image in the **Symbol image for cleverQ App** parameter for a specific service, which appears in the cleverQ App on the button for selecting the service. In addition, this image also appears in the upper area of the cleverQ App after the service has been selected. Thus, the image then replaces the general image for the site at this point.
- Under **Services > Files and images**, you can specify an image in the **Advertising image for cleverQ App** parameter for a specific service, which appears in the lower area in the cleverQ App after the service has been selected.

---

### Emails

You can make design settings for the emails sent by the system under **Sites > Emails**. You can also add a custom footer and custom additional text there.

---

### Displays

You can freely determine the design of the displays by their background image and by the positioning of the data fields displayed on them (requires appropriate user rights).

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### Touchscreens

Similar to the design of the displays, you can also freely determine the design of the touchscreens by using background images of the respective pages and by positioning the data fields displayed on them (requires appropriate user rights).

---

### Tickets

The general layout of printed tickets is fixed by the system and cannot be customized via the cleverQ administration interface. If you need individual adjustments to the layout of tickets, please contact support or your cleverQ distribution partner.

You can make settings for the structure of the ticket numbers if you enable the option **Set individual ticket design** under **Services > Ticket allocation**. In this case, the additional parameters **Ticket letter**, **First ticket number** and **Last ticket number** appear on the same configuration page.

---

### Desks

Because your customers do not see the contents of the desks, the desks always appear uniformly in the cleverQ colors.

Which functions are available on a desk depends on the configuration of the desk and on the permissions assigned to the desk (see [Guide – Desks](#)).

Under **Desks > Visual settings** you can find the parameter **Use inMode desk design**, which allows you to enable certain functionalities and a modern design of the desk (default setting).

---

### Special requirements

If you have any special design requirements that cannot be solved with the cleverQ on-board tools, you can have us create a so-called web package as a service. Such web packages can be used for desks, for displays, for the web appointments page, for statistics, and for a special landing page.

## 2.9 Guide – Individual info documents and info links

In various places in cleverQ, you have the option to provide individual files and links for your customers or to include such files and links in emails sent by the system.

The following overview summarizes the places where this is possible and can be configured.

---

### Info documents and info links for services

- Under **Services > Appointment allocation**, you can use the **Send info file** parameter to specify that customers receive a file as an attachment to the email that confirms a successful appointment booking for a specific service (and only for this particular service). Which file this is, can be selected under **Services > Files and images** in the parameter **Info PDF for appointment confirmations** and **Info PDF for appointment confirmations with locale**.
- If the option **Send appointment as ICS file** is enabled under **Services > Appointment allocation**, cleverQ automatically sends customers an attachment with the booked appointment in ICS format in the confirmation email after a successful appointment booking for the service.
- Under **Services > cleverQ App**, you can use the **Show info file** parameter to specify that customers can open a PDF file for the service in question in the cleverQ App. (To do this, an info symbol appears next to the service before an e-ticket is pulled or an appointment is booked). You can upload the info file under **Services > Files and images**, parameter **Info PDF for cleverQ App**.

---

### Info documents and info links for requests

- Under **Requests > Info documents for customers**, you can use the **Info PDF**, **Info PDF 2**, **Info PDF 3** and **Info PDF with locale** parameters to upload up to three PDF files to cleverQ, which cleverQ will send as attachments together with the confirmation email following an appointment booking. In this case, info symbols also appear in the cleverQ App when the request is selected, which can also be used to display the contents of the files.
- Under **Requests > Info documents for customers**, you can use the **Info webpage** parameter to link to a webpage with further information for customers. A link to this page appears in the confirmation email after an appointment booking. (This link does not appear in the cleverQ App).

---

### Other info documents and info links

- If you use an advertising image in the cleverQ App, you can specify a web address to which this image is linked in the **URL for advertising image** parameter under **Services > Files and images**.
- Under **Sites > cleverQ App** you can link to your own imprint or legal notice with the parameter **Legal notice URL**.
- Under **Sites > Web appointments page**, you can link to your own imprint or legal notice and to your own privacy policy from the web appointments page using the parameters **Webpage with individual legal notice** and **Webpage with individual privacy policy**.
- Under **Sites > Emails** you can use the parameters **Webpage with individual legal notice** and **Webpage with individual privacy policy** to set that emails sent from cleverQ link to specific own pages.
- If the web appointments function is temporarily disabled, you can specify a page to be displayed instead of the web appointments page under **Sites > Appointment functions** with the parameter **Webpage displayed instead of the web appointments page**.

## 2.10 Guide – Foreign language and multilingual configurations

Optionally, you can set up cleverQ so that you can use it in multilingual environments:

- If you have *employees* (= *users*) who speak different languages, you can display the *administration interface* and *desks* in different languages.
- If you have *customers* who speak different languages, you can display the content of *touchscreens*, the *web appointments page*, and *emails* in the customer's language.
- The language of the cleverQ App automatically adapts to the language of the mobile device of the respective customer.

---

### Set languages generally available for a site

If you want to enable users to switch languages, you need to enter various texts in multiple languages during configuration – for example, the names of services and requests. For this purpose, the respective input fields are marked with flag symbols at the required places in the administration interface (see [Welcome to the administration interface](#)). Which languages are available here depends on the setting in the **Active languages** parameter under **Sites > Settings**.

---

### Languages for the administration interface and for desks

The language a *user* sees in the administration interface and on desks depends on the language setting of the user in their user profile (parameter **Language** under **Users > General**; for the own user profile also under **Edit profile**).

---

### Languages for service terminals (touchscreens)

The default language for customers on service terminals (touchscreens) depends on the language of the texts on the background image of the default page (page type *default\_page*, parameter **Background image for language 1**).

Optionally, you can also store several background images in different languages in parallel on a touchscreen and provide buttons that allow customers to switch between these languages.

---

### Language on displays

On displays, language switching is not useful and therefore not possible.

The texts here are always on the background image that is permanently assigned to the display.

If your customers speak different languages, you need to make the texts on the background multilingual accordingly. Example: instead of the text "Switch" use a bilingual text "Switch/Counter". For scrolling text you can similarly display the text one after the other in all relevant languages. Example: "Text in German – Text in English".

---

### Languages for the web appointments page

Which language is preset for the web appointments page is determined by the **Default language** parameter under **Sites > Web appointments page**. For the web appointments page, there is also the option to call the page via a specific URL parameter so that it appears in a specific preset language. This way, if you link the web appointments page from your own website, you can ensure that customers see the web appointments page in the same language that your website was already displayed in.

On the web appointments page, customers can also switch the language themselves at any time, provided that the **Show language selector** option is enabled under **Sites > Web appointments page**. You can also define which languages customers can choose from there under **Sites > Web appointments page**.

---

### Languages for the cleverQ App

The cleverQ App always automatically uses the language that is set on the mobile device of the respective customer. In case the cleverQ App is not available in this language, the cleverQ App appears in English.

Example: If the language setting on a mobile device is "Danish", the cleverQ App appears in Danish, as Danish is one of the languages supported by cleverQ. If the language setting on the mobile device is "Arabic", the cleverQ App appears in English, as Arabic is not one of the languages supported by cleverQ.

### Language of the texts related to a specific site

For the language in which texts related to a specific organization and site are displayed in the cleverQ App after selecting that organization and site, the following rules apply:

- If the interface language of the cleverQ App is one of the languages activated for the site (**Active languages** parameter under **Sites > Web appointments page**), and if texts have been entered for this language in the configuration, the cleverQ App displays all site-related texts in this language.
- If texts have been stored for the interface language of the cleverQ App in the configuration for the site, the cleverQ App displays all site-related texts in the **Default language** defined for the site under **Sites > Web appointments page**.

Example 1: On a Danish mobile device, all texts for a site appear in Danish because the Danish language is generally supported by cleverQ and Danish has been selected in the parameter **Active languages** under **Sites > Web Appointments page**.

Example 2: On an Arabic mobile device, all texts for the same site as in example 1 also appear in Danish because Arabic is not one of the **Active languages** for the site and the **Default language** set for the site is Danish.

Example 3: On an Arabic mobile device, the texts for a different site than in examples 1 and 2 appear in English because Arabic is also not one of the **Active Languages** for this site, but English has been selected as the **Default language** here.

---

### Languages for emails sent by the system

Emails sent by the system are always sent in the language in which the appointment was booked that the respective email refers to.

## 2.11 Guide – Desks

Desks are the interface for users. On the desks users call tickets and edit and manage them. The desks are also used to view the statistics, provided that this function is enabled for a desk.

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### Create desk

Desks can only be created by users of specific roles.

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### General settings

General settings of a desk and its permissions are defined under the menu items:

- **Desks > General**
- **Desks > Additional settings**
- **Desks > Service-dependent permissions**
- **Desks > General permissions**

---

### Settings about what is displayed on a desk

In part, the things displayed on a desk result from the permissions set for the desk. Other functions can be switched on or off directly according to the particular requirements of a desk under **Desks > Visual settings**.

Which functions appear on a desk also depends heavily on which functionalities are enabled in cleverQ in the first place.

- Ticket functions are only available if they have been enabled in general (menu item **Sites > Settings**, parameter **Module Tickets**).
- Appointment functions are only available if they have been generally enabled (menu item **Sites > Settings**, parameter **Module Appointments**).
- Statistics can only be displayed if the option **Activate statistics** is enabled under **Sites > Settings** and also the option **Allow making statistical analyses** under **Desks > Additional settings**.
- Surveys only appear if they have been defined and are enabled for a specific service.

---

### Services that can be provided at a desk

You can define which services can be performed at a desk – that is which tickets and which appointments the desk can process – under **Desks > Services**.

---

### Users who are allowed to use a desk

You can define which users are allowed to call and use a desk under **Desks > Users**.

---

### Emails that are sent by the system to employees

You can define per desk which emails users of the desk receive from the system. To be set under **Desks > Service-dependent emails**.

---

### Desk groups

Optionally, you can also combine several desks into desk groups (menu item **Groups > Desk groups**). These are used in particular for distributing alarms.

---

### Preview desk

To test the configuration of a desk, you can preview the desk at any time (see [Test individual desk](#)).

---

### Call desk

Whether a desk appears for a particular user immediately after the user logs in and whether a user can choose between multiple desks depends on the user's role and on whether the user is assigned to multiple desks (see [Access desk](#)).

## 2.12 Guide – Surveys

Surveys capture customer responses to specific questions from a predefined set of questions either at the end of an appointment or as a follow-up (see [Surveys](#)).

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### Create survey

You define and edit surveys under **Advanced settings > Surveys**.

There you also define which question set a particular survey contains.

---

### Enable survey

Only if the option **Activate surveys** is enabled under **Sites > Settings**, you will be able to conduct surveys later via desks or via email.

---

### Determine where and when a defined survey is shown

Under **Sites > Appointment functions** you determine for surveys of the type *Survey email*:

- when the survey will be sent (parameter **Send surveys after**)
- when the survey will become invalid if it is not answered (parameter **Surveys become invalid after**)

Under **Services > General** you can specify individually for each service whether a survey should be made for the service and which survey is used (parameters **Survey via desk** and **Survey via email**).

Under **Desks > Additional settings** the parameter **Enable surveys** decides whether a survey appears at all on the respective desk, if this survey is defined.

---

### Determine who may see the results of surveys

Whether a particular user can see the results of a particular survey depends on which desks this user is assigned to.

For each desk, if the **Enable surveys** option is enabled under **Desks > Additional settings** for the desk, all users of the desk will also be able to view the results of the surveys (as long as the surveys relate to one of the services provided by the desk).

For a given user, this means: If the user has access to the desk, the user will also have access to the respective surveys.

## 2.13 Guide – Waiting lists

For various reasons, appointments may not be bookable for a service. For example, no appointments may have been made available yet, or all the appointments that have been made available may be already taken.

Normally, in such a case, customers receive a message on the web appointments page and in the cleverQ App stating that there are currently no appointments available, and that customers should visit the web appointments page again later and start a new attempt. This can negatively impact the acquisition of new customers, and it can annoy existing ones. Not all customers may try again, especially multiple times if another appointment is not available on the second try. In the worst case scenario, dissatisfaction could arise over what is perceived as poor service. You can significantly mitigate this problem by setting up a waiting list.

If your organization is likely to experience appointment shortages, you can set up a waiting list for a service (or multiple waiting lists for multiple services) for customers who want to book an appointment.

If a waiting list is activated for a service and there are currently no available appointment slots for the service, customers will not immediately receive an appointment on the web appointments page, but they can be placed on a waiting list. Then, when it is a customer's turn on the waiting list, the customer can book the actual appointment.

---

### How it works

To be able to set up the function successfully, you must know and understand the underlying overall process. We describe this process using an example of a service "A" for which you want to set up the function of a waiting list.

#### Prerequisite: Substitute service

For the waiting list you need a second service as a substitute. This service comes into play when there are no appointments bookable for service A. We call this service in our example service "AW" (W for "waiting list"). Service AW becomes a substitute version of service A. The service is therefore assigned exactly the same requests as service A and also exactly the same customer into items.

#### Process

(1) In the settings for service A, you specify that service AW is to stand in as a substitute service if no appointments are bookable for service A.

(2) Unlike service A, service AW is configured so that appointments for service AW can only be booked via an appointment invitation. As a result, service AW does not appear on the web appointments page for customers to choose from. For customers, it always looks as if they are still trying to book an appointment for service A. In reality, they are actually going to

book an appointment for service AW instead. Therefore, in the future, your organization must also provide appointment slots for service AW in the appointment provisioning.

(3) If no appointments are bookable for service A, when a customer tries to book an appointment for service A, they land on a special page that informs them that they cannot currently book an appointment for service A, but that they can put themselves on a waiting list. For this purpose, the customer enters their customer information configured for service AW as in the case of a normal appointment booking.

(4) The customer confirms their information, receives an e-mail for verification, confirms this as well, and then ends up on the waiting list.

(5) It still looks to the customer as if they are booking an appointment for service A. In reality, however, the customer is now on substitute service AW.

(6) If sufficient capacity is available again in your organization, employees at one or more designated desks can use a special function to send appointment invitations to customers who are on the waiting list. Such an appointment invitation is an invitation to book an appointment for service AW (not service A). Since service AW has been assigned the same requests as service A, this makes no difference to the customer. For you as the provider, however, this difference is important, because you now must actually also provide appointment slots for service AW so that the customer can book their appointment for service AW.

(6) The customer receives the appointment invitation by email. This email contains a special link with which the customer can now book the appointment for service AW on the web appointments page.

---

### Configuration

The configuration of a waiting list requires various settings in different places. We describe the configuration below for the example of a waiting list for a service "A" and a substitute service AW for the waiting list as mentioned in the example of the previous section.

Ideally, proceed in the following order:

- 1 Have a user with the required user rights create Service AW as a replacement service for the waiting list.
- 2 Assign the same requests to service AW as are assigned to service A (menu item **Requests > Services**).

**Important:** None of the requests may be part of a request group. Request groups are not compatible with waiting lists.

- 3 Assign the same customer information to service AW as are assigned to service A (menu item **Services > Customer information**).

- 4 For service AW, enable the option **Appointment allocation active** (menu item **Services > General**).
- 5 For service AW, enable the option **Appointment invitation needed** (menu item **Services > Appointment allocation**).
- 6 For service AW, under **Services > Appointment allocation** set the parameter **Period for automatic appointment provision** to at least the same duration as the appointment invitation should be valid for booking the actual appointment (setting in step 8). Example: If a customer can book an appointment after their waiting time has expired and the customer has 3 days to do so, set the parameter **Period for automatic appointment provision** to at least 3 days.
- 7 Under **Services > Waiting list settings** in the **Selected service** parameter, select the service for which there is to be a waiting list – in the example, service A. >Enable the **Enabled** option. In the **Service for waiting list** parameter, select the substitute service that you had created specifically for the waiting list – in the example, service AW. In the **Description** parameter, add some information about the process for your customers.
- 8 Under **Sites > Appointment functions** in the parameter **Appointment invitations expire after**, determine how long the appointment invitations for booking an appointment should remain valid.
- 9 Take the new service (service AW) into account in the schedule templates (menu item **Appointment provision > Schedule templates**).

**Important:** As a matter of principle, make sure - also in the future - to apply new weekly schedules in good time so that customers who receive an appointment invitation can also book appointments for a sufficient period in advance (menu item **Appointment provision > Weekly schedules**).

- 10 Grant one or more desks the permissions to send appointment invitations for the customers on the waiting lists in the future:
  - Assign the new service (service AW) to the affected desks (menu item **Desks > Services**).
  - Under **Desks > General permissions**, activate the options **Allow sending appointment invitations** and **Allow managing appointments** for each of the affected desks.
- 11 Under **Hardware > Displays > Services**, assign the new service (service AW) to one or more displays so that calls to this service will then appear on these displays.

---

### Testing the function

If you want to test the behavior, note that you must open the web appointments page either on another computer or in another browser or in an "incognito" or "private" window (name

varies depending on browser).

You can then open the web appointments page on one computer or in one browser window, and in another window open the desk.

## 2.14 Guide – Dashboard, reports, statistics

- For the most important *current* data on the utilization of your sites, look at the **dashboard** in the administration interface under **Sites > Dashboard** (see [Show dashboard \(site overview\)](#)).
- **Reports** under **Sites > Reports** provide you with information about the data of *past* appointments and tickets.
- **Statistics**, which can be opened on desks provide you with information on customer traffic, waiting times, as well as processing times and their distribution.

**Important:** For the meaningfulness of the data obtained from the statistics, it is important that you distinguish precisely enough between the individual activities when defining the services and requests. Only then can you derive appropriately differentiated statements from the statistics later.

---

### Enable statistics

You determine whether cleverQ creates statistics at all under **Sites > Settings** with the parameter **Activate statistics**.

*Note: Unlike statistics, dashboard and report functions are always active and do not need to be explicitly enabled.*

You can determine whether cleverQ also saves and evaluates data related to individual desks and individual users in the statistics under **Sites > Settings** with the parameters **Activate desk-based statistics** and **Activate user-based statistics**. Important: When doing so, be aware of any applicable data protection regulations.

By which customer information the statistics are searchable is determined by the **Searchable** parameter under **Services > Customer information**.

---

### Specify who may view statistics

Which users can see the statistics generally depends on which desks the users are assigned to (assignment under **Desks > Users**).

For each desk, you can specify under **Desks > Additional settings** whether and which statistics users can access at this desk (parameters **Allow making statistical analyses** and **Allow making statistical analyses across multiple sites**).

For user-specific statistics (if they have been enabled), there is another access requirement: Only those users for whom it has been explicitly enabled have access to these special statistics (menu item **Users > General**, parameter **May view user-specific statistics**). In contrast to the general access to statistics, this right does not depend on the desk, but directly on the respective user.

---

### **View statistics**

You cannot see the results of the statistics in the cleverQ administration interface, but only on desks for which access to the statistics has been enabled.

## 3 General site settings and information

A site is a self-contained unit that uses cleverQ and for which the settings made in cleverQ apply in each case. Usually, each site has its own postal address.

An organization can have any number of sites. Example: Branches of a company in different cities.

Topics in this section:

- [Show dashboard \(site overview\)](#)
- [Show reports](#)
- [Select site](#)
- [Site general settings](#)
- [Design web appointments page](#)
- [Access web appointments page](#)
- [Web app color settings](#)
- [Set up waiting room page](#)
- [Design emails](#)
- [Specify third-party tokens](#)

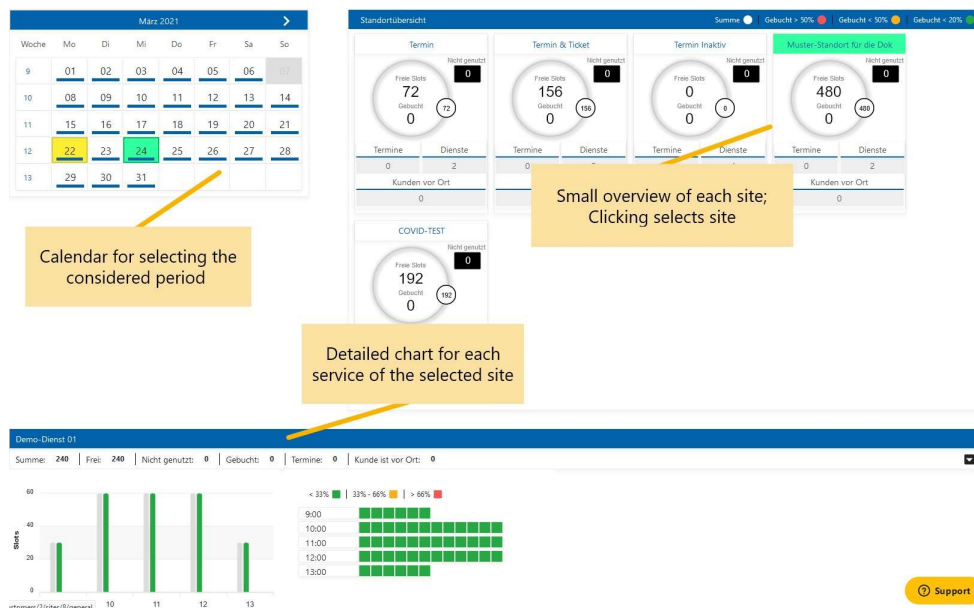
## 3.1 Show dashboard (site overview)

On the site overview, you can see the current utilization rates of all your sites.

### Call

> In the menu, select **Sites > Dashboard**.

→ A calendar and a small overview for each available site appear.



In the calendar, you determine the time period displayed.

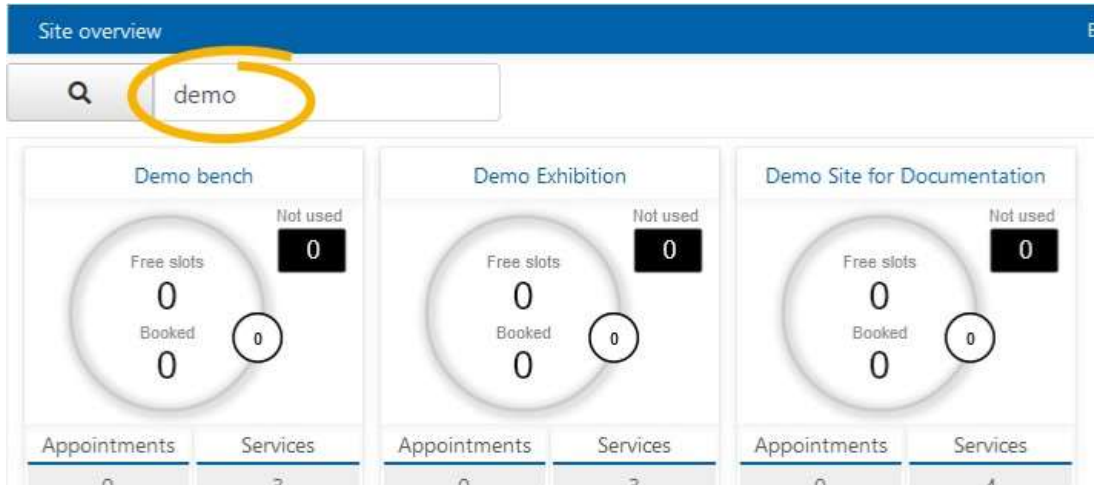
If you click one of the small overviews, below it a detail diagram opens for each service offered at that site.

### Filter / Site search

If you manage a lot of sites, you can limit the display to one or more sites of specific names.

> In the search box above the sites, type part of the name of the sites you want to see. (This does not have to be the first letters, but can also be characters that appear later in the site name).

→ Only the sites whose names contain the entered character string remain visible.

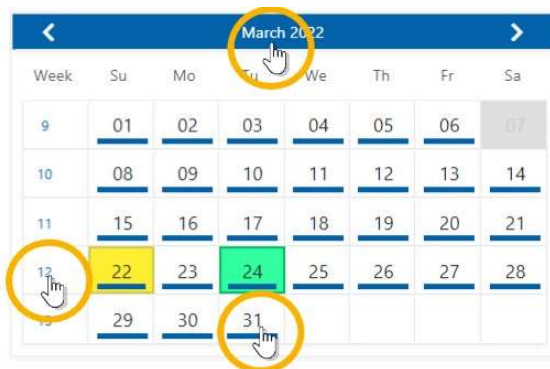


## Calendar

In the calendar, select the time period to which the data displayed on the page refers.

<b>Select specific day</b>	> Click the day.
<b>Select specific week</b>	> In the <b>Week</b> column, click the number of the calendar week.
<b>Select whole month</b>	> Click the name of the month in the calendar header.

→ The selected period is highlighted in green in the calendar. The current day is highlighted in yellow in the calendar. The yellow highlighting is for identification purposes only and does not affect the dates displayed.

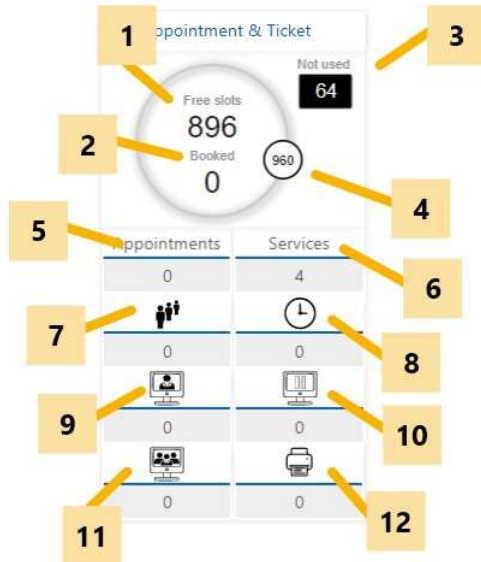


To change the displayed month:







> Click the "Arrow right" symbol (one month forward) or "Arrow left" symbol (one month back) in the calendar header.

### Overview of each site

For each configured site, you can see a small overview with information about the total of free and booked appointment slots in the considered period as well as other data. Some of these data are also related to the period selected in the calendar, and some are related to the current day.



[1]	Number of appointment slots still available in the period under consideration.
[2]	Number of appointment slots already occupied in the period under consideration.
[3]	Number of appointment slots not yet made available in the period under consideration and therefore not yet bookable.
[4]	Sum of the values under "Free slots" and "Not used".
[5]	Number of services offered at the site.
	Number of customers currently on site at the site.
	Average waiting time in minutes, based on the time period under consideration.
	Number of appointments booked for the period under consideration.

	Number of desks that are currently calling a customer and have not yet fully processed the customer's request.
	Number of desks that are currently logged on to the system.
	Number of desks that are currently in <i>paused</i> mode.
	Number of tickets already created on the current day.
	Number of tickets processed on the current day.
	Number of appointments processed on the current day.

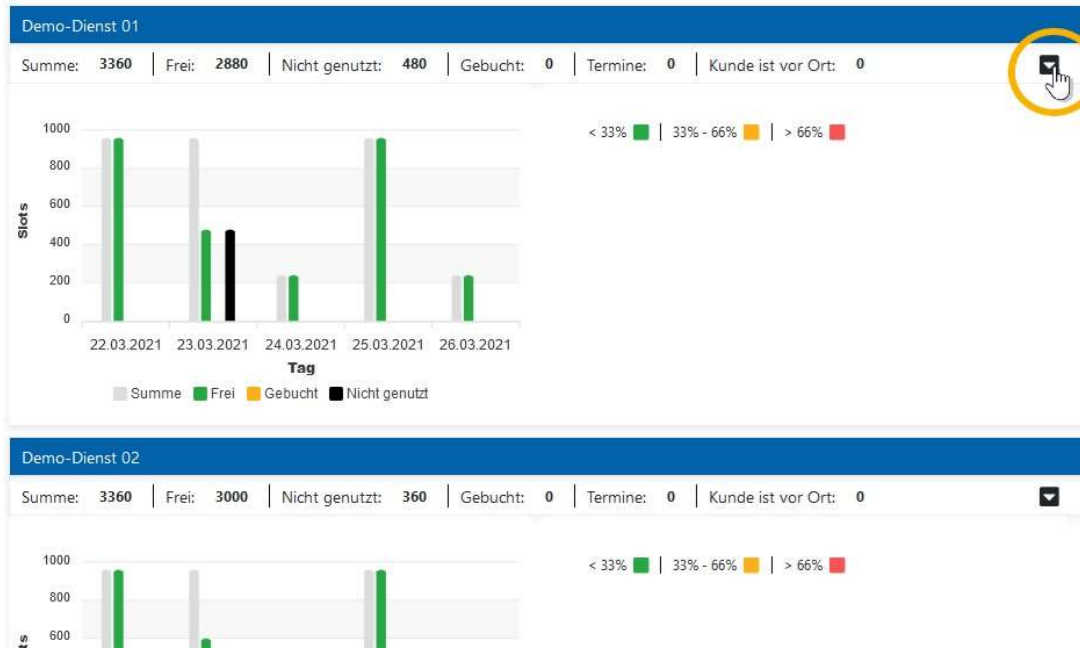
---

### Detail diagram for each service of a site

When you click the small overview of a site, a detail chart for each service offered at that site appears at the bottom of the page.

If a single day is selected in the calendar, the detail charts show the time distribution by the individual hours of that day. If an entire week or month is selected in the calendar, the detail charts show the time distribution by the individual days.

*Tip: If you are only interested in certain services, or if you want to compare the data of certain services with each other, you can expand and collapse individual detail charts.*



## 3.2 Show reports

Reports provide information about the data of past appointments and tickets. The reports contain all customer information entered by the customers as well as the respective appointment times and reservation numbers.

CleverQ generates the reports in CSV format, so you can load the reports into almost any spreadsheet application for statistical analysis – for example into Microsoft Excel or Libre Office Calc.

Reports you generate are also available to other users.

---

### Call

> In the menu, select **Sites > Reports**.

→ A page for creating and downloading reports appears.

---

### Automatically created reports

If the **Activate ticket reports** option is enabled under **Sites > Settings**, a new ticket report will automatically appear each day in the list of available reports.

---

### Create report manually

To create a new report:

- 1 In the **Time range** section, select the days the data of which you want the report to contain.
- 2 In the **Service** section, either select the service the data of which the report is to contain, or select the *All services* option for a summary report with data from all services.
- 3 Click the **Create report** button.

→ The new report is created and appears as the last one in the list.

---

### Open report

To view a specific report, you need to download the report to your computer and then open it with a program that can display files in CSV format:

> Click the **Download** button in the **Download** column.

→ Depending on your browser settings, you are asked which program you want to use to open the file or where you want to save the file.

---

### Delete report manually

To delete a report that is no longer needed:

> Click the "Trash" symbol in the **Actions** column.

→ The report disappears from the list.

---

### Automatic deletion of older reports

The system can store a maximum of 10 reports at a time. If this number is exceeded, the oldest report is automatically deleted.

In addition, each report has an expiration date. When this date is reached, the report is also automatically deleted – regardless of how many other reports are still available. The respective date can be found in the **Expiration date** column in the list of reports.

### 3.3 Select site

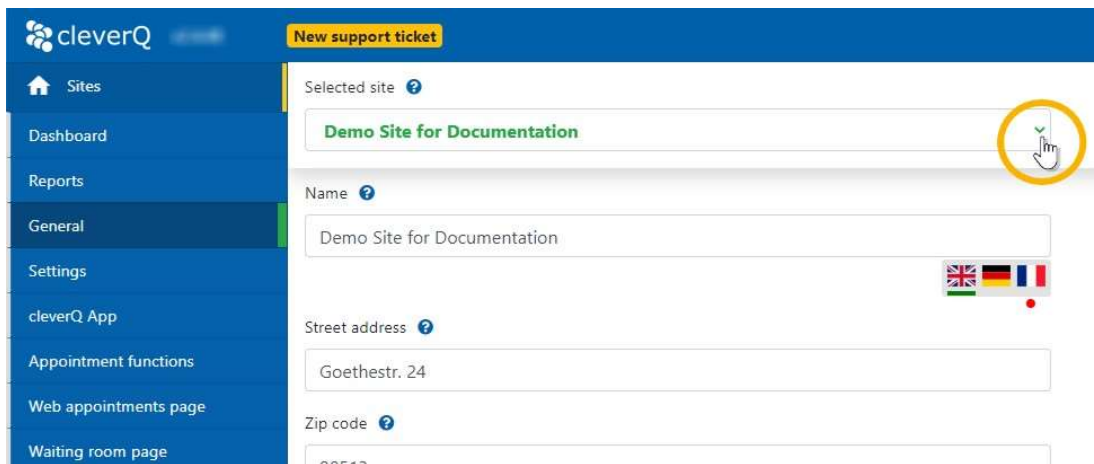
**Important:** Even if you have multiple sites and are allowed to configure them according to your user rights, most configuration settings always refer to a concrete site. Therefore, always make sure that the correct site is set.

If you have access to multiple sites, you can see the currently selected site in the header bar, and you can also switch the site there if necessary.

The number after the site name indicates the total number of sites available to you.



On all pages that relate to general site settings, there is also a separate drop-down list for changing the site.



## 3.4 Site general settings

The general settings of a site primarily relate to its basic data, such as name, address, and contact information.

**Important:** Some of the data entered will also be transferred to the cleverQ App and thus are visible to customers!

---

### Call

> In the menu, select **Sites > General**.

→ A page with the site's basic data appears.

---

### Selected site

Here you can see and select the site to be edited. The settings made only apply to this site.

**Caution:** If you change the site here, this generally switches the site for all further configuration work. Do not forget to switch back to the applicable site later in other parts of the configuration if necessary.

---

### Settings

Parameter	Meaning
Name	Name used for the site within the cleverQ user interface.
Street address	Street and house number of the site.
Zip code	Postal code of the site.
City	City or municipality in which the site is located.
Alternative text for site address in cleverQ app	If a text is stored here, it replaces the address in the cleverQ app.

<b>Parameter</b>	<b>Meaning</b>
<b>Phone</b>	Phone number where <i>customers</i> can reach the site.
<b>Fax</b>	Fax number where <i>customers</i> can reach the site.
<b>Email</b>	Email address where <i>customers</i> can reach the site.
<b>Name statistic</b>	If a name is stored here, it replaces the site name in the statistic.

## 3.5 Design web appointments page

**Requirements:** The settings made here only have an effect if the option **Allow web appointments** is enabled under **Sites > Appointment functions**. At the same time, the option **Disable web appointment function and display info page** must not be enabled under **Sites > Appointment functions**.

You can customize the web appointments page, on which customers can book appointments for a site, to suit your individual needs as well as your own design guidelines.

*Note: These settings only affect the web appointments page displayed in a web browser, but not the display of appointment bookings in the cleverQ App. You can make settings for the cleverQ App under **Sites > cleverQ App**.*

---

### Call

> In the menu, select **Sites > Web appointments page**.

→ A page with the settings for the web appointments page appears.

---

### Selected site

Here you can see and select the site to be edited. The settings made only apply to this site.

**Caution:** If you change the site here, this generally switches the site for all further configuration work. Do not forget to switch back to the applicable site later in other parts of the configuration if necessary.

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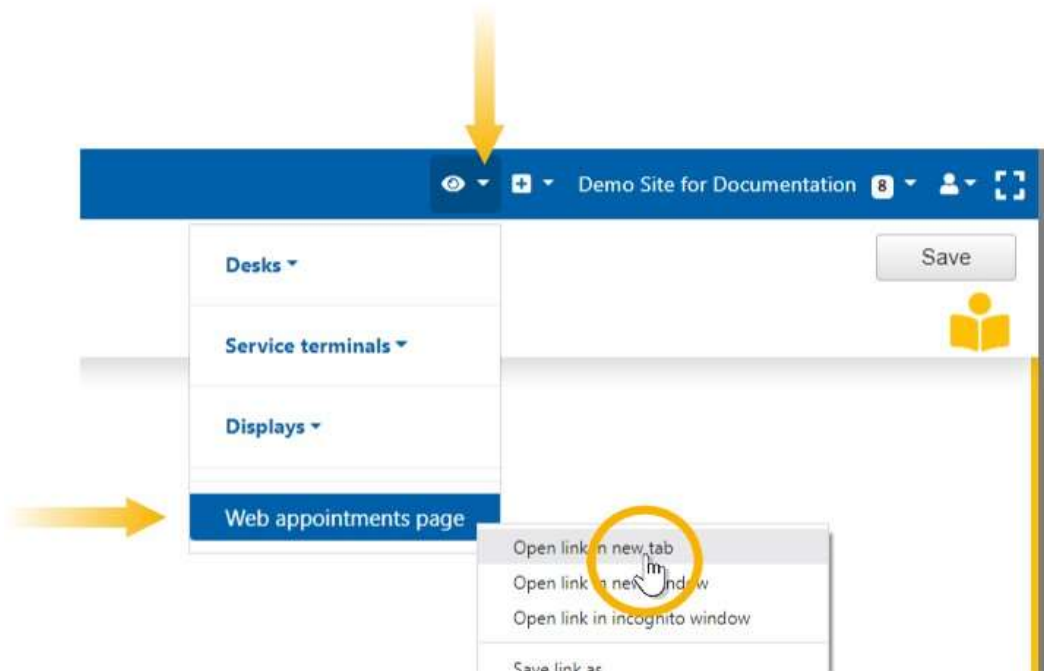
### Test current configuration

**Requirements:** To be able to test and check your settings in a useful way, cleverQ should already be configured to the extent that appointments can be booked. This means that services and requests should already have been created and some appointment slots should already have been made available. In addition, the appointment functions should be configured.

You can easily check how your configuration affects the appearance and functionality of the web appointments page at any time:

- 1 Click the "Eye" symbol in the header bar.

- 2 In the menu that appears, right-click **Web appointments page**.  
→ A context menu of your browser appears.



- 3 In the context menu, select **Open link in new window** or **Open link in new tab** (the exact wording depends on the browser you are using).  
→ The web appointments page appears in an additional, new browser window or on another tab.

*Tip: You can keep this window or tab open continuously during configuration. In this case, however, note that you have to reload the page there each time to see a change that you have made ("Reload page" function in the browser). Also note that most changes only become active after clicking the **Save** button in cleverQ.*


### Display settings

Parameter	Meaning
<b>Show services selector</b>	<p>If this option is enabled, customers must first select a services group (if defined) and a service. Only then will customers be shown a selection of requests provided by the selected service.</p> <p>If the option is disabled, <i>all</i> requests of <i>all</i> services appear immediately for selection.</p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> Enable the option especially if you have defined very many different requests for which customers can book appointments. This helps customers find the request that applies to them in a targeted manner.</p> <p>If there are only a few requests, you can dispense with the service selection. Customers will then have to click less often on the web appointments page and will reach their destination faster.</p>
<b>Show header</b>	<p>If this option is enabled, a header appears on the web appointments page, consisting of a logo or an individual header (see <b>Use custom header</b> parameter).</p>
<b>Use custom header</b>	<p><b>Requirements:</b> Only has an effect if the <b>Show header</b> option is also enabled.</p> <p>Replaces the cleverQ default header with an individual one.</p> <p><i>Note: The individual header must be stored in the system by support. Please contact support for this if necessary. If no individual header is available, the option is ignored and the default header is used instead.</i></p>
<b>Show language selector</b>	<p>If this option is enabled, a language selector appears in the top right corner of the web appointments page (clickable flag symbols).</p> <p><i>Note: The language selector also appears when the header is turned off.</i></p> <p>You determine which languages are available in the language selector in the <b>Active languages</b> section.</p>
<b>Show field for entering an invitation code</b>	<p>If this option is enabled, an area appears at the top of the web appointments page where customers can enter an appointment invitation code received from an employee and have it verified.</p> <p>This way, customers can then also book those appointments that are only bookable by invitation (appointments for services for which the option <b>Appointment invitation needed</b> is enabled under <b>Services &gt; Appointment allocation</b>).</p>

Parameter	Meaning
	<div data-bbox="555 331 1353 488" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> The advantage of an invitation code over an appointment invitation as a link is that employees can easily communicate the invitation code by phone.</p> </div> <p><i>Note: For the heading of the input area, the text from the <b>Welcome message heading</b> parameter is used. For the text prompt for the invitation code, the text from the <b>Welcome message content</b> parameter is used.</i></p>
<p><b>Show privacy policy check box</b></p>	<p>If this option is enabled:</p> <ul style="list-style-type: none"> <li>▪ The text of your privacy policy appears at the end of appointment booking. You enter this text in the <b>Individual privacy policy</b> parameter.</li> <li>▪ For customers, a check box appears next to the text of the privacy policy. To be able to complete the appointment booking, customers must enable this check box and thus confirm that they have read the privacy policy.</li> </ul> <p>If this option is <i>not</i> enabled:</p> <ul style="list-style-type: none"> <li>▪ Only a short standard text and a link to your external privacy policy appear at the end of the appointment booking. You can enter the web address of this privacy policy in the <b>Website with individual privacy policy</b> parameter.</li> <li>▪ Customers do not have to explicitly confirm that they have read the privacy policy.</li> </ul>
<p><b>Show links to the cleverQ App</b></p>	<p>If this option is enabled, links to the app stores where customers can download the cleverQ App appear in the footer.</p> <p>In addition, links to the cleverQ App also appear on the confirmation page at the end of an appointment booking, along with some additional text referring to the cleverQ App's usage options.</p> <div data-bbox="555 1709 1353 1865" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> This makes it easier for customers to access the cleverQ App and thus use the cleverQ mobile functions. We therefore recommend enabling this function.</p> </div>

Parameter	Meaning
<b>Hide cleverQ logo</b>	<p>If this option is disabled, a cleverQ logo linked to the cleverQ website and the cleverQ slogan next to it appear in the footer.</p> <p><i>Note: This setting has no effect on the logo in the header. If you want to remove the logo in the header, you need to hide the entire header (<b>Show header</b> parameter).</i></p> <p><i>Tip: You can also add your own logo to the page using the <b>Logo</b> parameter.</i></p>
<b>Hide QR code</b>	<p>At the end of an appointment booking, customers receive a QR code on the confirmation page in addition to the reservation code. They can scan this QR code with the cleverQ App and then receive reminders about the appointment on their cell phone via push notification. In addition, customers need this QR code if the option <b>On-site confirmation needed</b> is enabled under <b>Sites &gt; Appointment functions</b> and you provide a QR code scanner for confirmation.</p> <p>If you do not offer these features, you can omit the QR code from the confirmation page by enabling the <b>Hide QR code</b> option.</p>
<b>Use alternative buttons</b>	<p>If this option is enabled and the <b>Show symbols on buttons</b> option is also enabled, the symbols specified in the <b>Symbols on buttons</b> section appear on the buttons.</p> <p><i>Note: Else the <b>Show symbols on buttons</b> option has no effect.</i></p>
<b>Show drop shadows</b>	<p>If this option is enabled, a faint drop shadow appears around all buttons to create a slightly plastic impression.</p> <p><i>Note: The color and intensity of the drop shadow are preset and cannot be changed.</i></p>
<b>Show border around buttons</b>	<p>If this option is enabled, a narrow black border appears around some buttons to make these buttons more visually prominent:</p> <ul style="list-style-type: none"> <li>▪ Button "Continue to appointment booking"</li> <li>▪ Buttons for calling the tooltips for services and requests</li> <li>▪ Button "Continue to appointment selection"</li> <li>▪ Buttons for selecting days and appointment slots</li> </ul>

Parameter	Meaning
<p><b>Show symbols on buttons</b></p>	<p><b>Requirements:</b> Only available if the <b>Use alternative buttons</b> option is also enabled.</p> <p>If this option is enabled, you can include symbols on various buttons to visually clarify the function of the buttons.</p> <p>The symbols are selected in the respective fields in the <b>Symbols on buttons</b> section.</p>
<p><b>Hide tooltips for requests</b></p>	<p>If this option is disabled, when a request is selected, next to the relevant button a second button appears to call the texts that are stored under <b>Requests &gt; General</b> in the parameter <b>Description in tooltip on web appointments page</b>.</p>
<p><b>Hide tooltips for services</b></p>	<p>If this option is disabled, when a service is selected, next to the relevant button a second button appears to call the texts that are stored under <b>Services &gt; General</b> in the parameter <b>Description in tooltip on web appointments page</b>.</p>
<p><b>Show when there are only a few appointment slots left</b></p>	<p>If a customer selects an appointment, the appointment slots of the respective day are highlighted in color, depending on whether appointments are still available. There is basically one color for "no more appointments available" and one color for "appointments still available".</p> <p>If the option <b>Show when there are only a few appointment slots left</b> is enabled, there is a third color for the case that only one appointment is still bookable.</p>  <p>The screenshot shows a grid of appointment slots. The first row contains slots from 1:20 to 11:55. The second row contains slots from 2:20 to 12:55. The legend below the grid shows three categories: 'No appointments available' (grey), 'Only a few appointments available' (yellow), and 'Appointments available' (green). An orange arrow points from the legend to the grid.</p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> If your workload is typically distributed very unevenly throughout the day, you could, for example, ask customers to preferentially book times when there are still many appointments available. This will make it less crowded for customers on site, more customers will find a suitable appointment, and you will achieve a more evenly distributed workload throughout the day.</p>
<p><b>Show unavailable appointment slots in gray color</b></p>	<p>If this option is enabled, the web appointments page also displays in gray those appointment slots for which no appointments can generally be booked at all.</p> <p>Otherwise, only those appointment slots appear on the web appointments page for which appointments are or were generally bookable.</p>
<p><b>Show welcome message</b></p>	<p>If this option is enabled, a heading and a text appear at the top of the web appointments page, the contents of which you can define individually. The same headline and text also appear in the cleverQ App in this case.</p> <p>You enter the contents in the parameters <b>Welcome message heading</b> and <b>Welcome message content</b>.</p>
<p><b>Show "Your choice"</b></p>	<p>One of several ways to call the web appointments page is via special IDs. These IDs ensure that a certain service or request is already preselected on the called web appointments page (see <a href="#">Access web appointments page</a>).</p> <p>For such calls, you can hide the "Your choice" text on the web appointments page by deactivating this parameter. This prevents customers from mistakenly getting the impression that they have selected something by themselves.</p>
<p><b>Show "Your contact information will automatically be deleted from cleverQ after your appointment"</b></p>	<p>If this option is enabled, the information that the data will be automatically deleted after the appointment is displayed at the top of the form for entering customer data.</p>

Parameter	Meaning
<p><b>Enable DIGlaccess support</b></p>	<p>If this option is enabled, the web appointments page supports the <i>DIGlaccess</i> service, which provides greatly barrier-free accessibility to the web appointments page.</p> <p>DIGlaccess enables customers to easily adjust the display of the web appointments page to take for example visual impairments into account. There is also a screen reader, and keyboard navigation can be enabled.</p> <p>For more information on DIGlaccess, see <a href="https://www.digiaccess.org">https://www.digiaccess.org</a>.</p> <p><i>Note: If this option is enabled, this also includes appointment booking from the desk.</i></p>
<p><b>Enable digi easy access mode</b></p>	<p><b>Requirements:</b> This parameter only appears after „Enable DIGlaccess Support“ has been activated.</p> <p>This option enables specific settings for our customer „Magenta-AT“</p>
<p><b>Enable Eye-Able support</b></p>	<p>If this option is enabled, the web appointments page supports the Eye-Able service, which provides greatly barrier-free accessibility to the web appointments page.</p> <p>Eye-Able enables customers to easily adjust the display of the web appointments page to take for example visual impairments into account. There is also a screen reader, and keyboard navigation can be enabled.</p> <p>For more information on Eye-Able, see <a href="https://eye-able.com">https://eye-able.com</a>.</p> <p><i>Note: If this option is enabled, this also includes appointment booking from the desk.</i></p>
<p><b>Show slots availability with symbols</b></p>	<p>If this option is enabled, available appointment slots on the web booking page are marked with a checkmark, and unavailable slots are marked with an X. This simplifies the visibility and display of free appointment slots.</p>

## Active languages

Parameter	Meaning
<p><b>(Language selection)</b></p>	<p><b>Requirements:</b> Only has an effect if the <b>Show language selector</b> option is enabled.</p> <p>Here you determine between which languages the visitors of the page can switch. For each language, a corresponding symbol flag appears at the top right of the page.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p><b>Important:</b> Make sure that corresponding texts are entered for the selectable languages in all language-dependent configurable text fields. Otherwise, these texts will be missing from the display.</p> </div> <p>Which languages you can select at this point depends on which languages are selected under <b>Sites &gt; Settings</b> in the <b>Active Languages</b> section.</p>
<p><b>Default language</b></p>	<p>Determines which language the web appointments page will be displayed in when the page is accessed without any special URL parameter for the language.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>▪ <code>https://cqm.cleverq.de/public/appointments/my_site/index.html</code> calls the web appointments page in the language specified in the parameter <b>Default language</b></li> <li>▪ <code>https://cqm.cleverq.de/public/appointments/my_site/index.html?lang=de</code> always calls the web appointments page in German language</li> <li>▪ <code>https://cqm.cleverq.de/public/appointments/my_site/index.html?lang=en</code> always calls the web appointments page in English language</li> </ul> <p>The exact addresses depend on the cleverQ server assigned to your organization and on the the <b>Site URL name</b> parameter under <b>Sites &gt; Settings</b>.</p> <p><i>Note: Provided that the <b>Show language selector</b> option is enabled, customers can change the language at any time when needed.</i></p>

## Security

Parameter	Meaning
<b>Enable Microsoft Entra ID authentication</b>	<p>If this option is enabled, the web appointment page can only be accessed with Office 365 credentials.</p> <p><b>Requirements:</b> In <b>Locations</b> → <b>Settings</b>, the <b>Secure Website</b> option must be enabled. Then, the relevant data must be entered under <b>Locations</b> → <b>Security Settings</b>. Additionally, each user must have an account in cleverQ where the Office 365 email address is entered as both the <b>username</b> and the <b>email address</b>.</p>
<b>reCaptcha v2 by Google</b>	<p>Google's reCaptcha service attempts to ensure that an appointment booking on the web appointments page is actually made by a human and not by an automated computer program ("bot").</p> <p>Only when a customer has successfully confirmed at the end of the web appointments page that they are a human being and not a bot does the button <b>Make an appointment now</b> appear.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Caution:</b> Please note that due to the use of a third-party service, you may need to adjust your privacy policy accordingly.</p> </div>

## Texts and URLs

Parameters	Meaning
<b>Request-info text</b>	<p><b>Requirements:</b> Only used if an appointment is booked for a request and no individual text is stored for the selected service (menu item <b>Services</b> &gt; <b>General</b>, parameter <b>General description on web appointments page</b> is empty).</p> <p>Info text for the customer. Appears next to the selectable requests.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Tip for implementation:</b> Here you can, for example, prompt the customer to select the desired requests and point out what needs some special attention.</p> </div> <p>Optionally, you can also enter HTML code in this field and in this</p>

Parameters	Meaning
	<p>way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>Header for selection of services group</b></p>	<p><b>Requirements:</b> Only used if services groups are created under <b>Groups &gt; Service groups</b>. Also only used if the <b>Show services selector</b> option is enabled.</p> <p>The text specified here appears as a heading above the services group selection.</p>
<p><b>Header for selection of services group (HTML)</b></p>	<p>Header used to show the services group on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>Header for selection of service</b></p>	<p><b>Requirements:</b> Only used if the <b>Show services selector</b> option is enabled.</p> <p>The text specified here appears as a heading above the service selection.</p>
<p><b>Header for selection of service (HTML)</b></p>	<p>Header used to show the service on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on</p>

Parameters	Meaning
	<p>your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;</code>info page<code>&lt;/a&gt;</code>.</p>
<p><b>Header for selection of request group</b></p>	<p><b>Requirements:</b> Used only if request groups are created under <b>Groups &gt; Request groups</b>.</p> <p>The text specified here appears as a heading above the request group selection.</p>
<p><b>Header for selection of request group (HTML)</b></p>	<p>Header used to show the request group on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;</code>info page<code>&lt;/a&gt;</code>.</p>
<p><b>Header for selection of request</b></p>	<p><b>Requirements:</b> Used only if requests are defined for which appointments can be booked. (Does not appear when booking appointments for services directly.)</p> <p>The text defined here appears as a heading above the selection of the request.</p>
<p><b>Header for selection of request (HTML)</b></p>	<p>Header used to show the request on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find addi-</p>

Parameters	Meaning
	<p>tional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<p><b>Header for selection of number of tasks</b></p>	<p><b>Requirements:</b> Used only if a number of tasks greater than 1 can be selected for at least one request (parameter <b>Maximum possible operations</b> under <b>Request &gt; General</b> greater than 1).</p> <p>This text appears as a header above the area where customers can specify the number of operations for each request.</p>
<p><b>Footer for selection of number of tasks</b></p>	<p><b>Requirements:</b> Used only if a number of operations greater than 1 can be selected for at least one request (parameter <b>Max number of tasks</b> under <b>Request &gt; General</b> is greater than 1).</p> <p>This text appears under the area where customers can specify the number of tasks for each request.</p>
<p><b>Individual text in appointment summary</b></p>	<p>This text appears at the end of an appointment booking below the summary of requests selected by the customer.</p>
<p><b>Individual text to indicate necessary e-mail address</b></p>	<p>If a customer does not specify an e-mail address, a message appears stating that online appointment booking is not possible without specifying an e-mail address because otherwise the appointment confirmation and any required documents cannot be delivered.</p> <p>Here you can optionally specify the text for this message. If you do not enter anything here, cleverQ uses a default text.</p>
<p><b>Individual privacy policy</b></p>	<p><b>Requirements:</b> Displayed only if the <b>Show privacy policy check box</b> is selected. (Otherwise, you need to refer to an external web address with your privacy policy with the parameter <b>Webpage with individual privacy policy</b>.)</p> <p>Original text of your privacy policy.</p> <p>This text appears at the end of an appointment booking just above the button to complete the booking. Next to the text the check box that customers must use to confirm that they have read the privacy policy appears.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to ex-</p>

Parameters	Meaning
	<p>ternal webpages and documents if needed, such as to supplement-ary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags &lt;br&gt; or &lt;p&gt; and &lt;/p&gt;.</p> <p>Example: This text is &lt;b&gt;bold&lt;/b&gt;.&lt;br&gt;You can find addi-tional information on our &lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;.</p>
<p><b>Individual privacy policy for touch-screens</b></p>	<p>Here you can optionally enter a text with your specific privacy policy. Customers can view this privacy policy on a touchscreen when booking an appointment.</p> <p>If the field remains empty, cleverQ displays its default privacy policy.</p>
<p><b>Individual Terms of Service</b></p>	<p>If you enter a web address(URL) here, an additional link appears next to legal notice and privacy policy in the page's footer.</p>
<p><b>Website that links to cleverQ</b></p>	<p>After a successful appointment booking, a window with the ap-pointment summary appears. In this window there is a button with the text "Return to provider".</p> <p>The parameter specifies the web address (URL) to which this button links back.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Important:</b> To avoid confusion among customers, you should not use the general URL of your website's homepage here, but actually the URL of the exact page from which customers call the appointments page.</p> </div>
<p><b>Web page with in-dividual legal no-tice</b></p>	<p>Enter here the web address (URL) of a webpage that contains your legal information (imprint). This is used for the corresponding link in the footer of the web appointments page.</p> <p><i>Note: If you leave this field empty, the link will lead to the cleverQ imprint by default.</i></p>
<p><b>Web page with in-dividual privacy</b></p>	<p>Enter here the web address (URL) of a website that contains your privacy policy.</p>

Parameters	Meaning
<p><b>policy</b></p>	<p>The corresponding link in the footer of the web appointments page refers to this address.</p> <p><i>Note: If you leave this field blank, the link will lead to the cleverQ privacy policy by default.</i></p> <p>In addition, this web address is used if the <b>Show privacy policy check box</b> is disabled and thus the privacy policy that can be entered in the <b>Individual privacy policy</b> parameter is not displayed. In this case, a link to the specified address also appears at the end of a booking before the button for confirmation by the customer.</p>
<p><b>Custom confirmation text</b></p>	<p>This text appears at the beginning of the confirmation page after a successful appointment booking.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>Custom text for links to the cleverQ App</b></p>	<p>This text appears at the beginning of the confirmation page after a successful appointment booking if On-site Confirmation, Customer Confirmation, or Employee Confirmation are not enabled.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>

Parameters	Meaning
<p><b>Custom confirmation text for on site confirmation</b></p>	<p>This text appears at the beginning of the confirmation page after a successful appointment booking if On-site Confirmation is enabled.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <b>bold</b>.            You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<p><b>Custom confirmation text for customer confirmation</b></p>	<p>This text appears at the beginning of the confirmation page after a successful appointment booking if Customer Confirmation is enabled.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <b>bold</b>.            You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<p><b>Custom confirmation text for employee confirmation</b></p>	<p>This text appears at the beginning of the confirmation page after a successful appointment booking if Employee Confirmation is enabled.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <b>bold</b>.            You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>

Parameters	Meaning
	<pre>tps://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;.</pre>
<b>Custom text "No free slots available"</b>	<p>Here you can optionally specify an individual text to be displayed to customers on the web appointments page if no free appointment slots are available for a service. The reason for this may be that no appointments have been provided, or that all possible appointments have already been taken.</p> <p>If the field remains empty, cleverQ uses a standard text with the information that the selection is currently all booked up and the customer should try again at a later time.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> In an individual text you can tell your customers, for example, how long it will take until appointments are available again, or how you can help your customers in other ways.</p> </div>
<b>Custom SMS option text</b>	<p>Notifications about an appointment via SMS are sent to customers who activate this option.</p> <p>You can enter an individual text here.</p> <p>If the field remains empty, cleverQ uses a standard text.</p>
<b>Custom data security notice</b>	<p>Here you can optionally enter a text about your individual data security policy.</p> <p>If the field remains empty, cleverQ displays its standard data security notice.</p>

### Welcome message

Parameter	Meaning
<b>Welcome message header</b>	<p><b>Requirements:</b> Displayed only if the <b>Show welcome message</b> option or the <b>Show field for entering an invitation code</b> option is enabled.</p> <p>Text of the welcome text's heading.</p>

Parameter	Meaning
	<p><i>Note: If the option <b>Show field for entering an invitation code</b> is enabled, the text appears there.</i></p> <p>If the <b>Show welcome message</b> option is enabled, the text also appears in the cleverQ App.</p>
<p><b>Welcome message content</b></p>	<p><b>Requirements:</b> Displayed only if the <b>Show welcome message</b> option or the <b>Show field for entering an invitation code</b> option is enabled.</p> <p>Welcome text content.</p> <p><i>Note: If the option <b>Show field for entering an invitation code</b> is enabled, the text appears there.</i></p> <p>If the <b>Show welcome message</b> option is enabled, this text also appears in the cleverQ App.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>Domain whitelist</b></p>	<p>Here you can enter one or more websites that are authorized to embed the web appointments page in an iframe.</p> <p>Enter the domains without protocol information and each separated by a comma and space. Wildcard characters are also possible.</p> <p>Example:  <code>example.de, appointments.mydomain.de, myglobalsite.*</code></p>

## Logo and background

Parameter	Meaning
<b>Logo</b>	<p>Here you can optionally upload a small image which will be displayed between the header and the interaction area of the page.</p> <p>The image initially appears in its original size. However, you can limit the size via the <b>Logo height</b> parameter.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Important:</b> To avoid unnecessarily long transfer times, make sure that the file size is as small as possible. Use a resolution that is appropriate for the size of the actual display, but not many times larger. An unnecessarily high resolution does not increase the visual quality and sharpness of the image. However, also make sure that the image is not smaller than its actual representation. Otherwise, the image may look blurred.</p> </div>
<b>Border around logo</b>	<p><b>Requirements:</b> Only available if an image file has been uploaded under <b>Logo</b>.</p> <p>If this option is enabled, the logo appears on a white rectangle with slightly rounded corners. The rectangle is slightly larger than the logo.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> This option is convenient if your logo has a transparent background and the <b>Background color</b> parameter is other than <i>white</i>.</p> </div>
<b>Logo height</b>	<p><b>Requirements:</b> Only available if an image file has been uploaded under <b>Logo</b>.</p> <p>Determines the display size of the logo. The aspect ratio is preserved when scaling.</p>
<b>Logo alignment</b>	<p><b>Requirements:</b> Only available if an image file has been uploaded under <b>Logo</b>.</p> <p>Determines the position of the logo: <i>right</i>, <i>left</i> or <i>center</i>.</p>
<b>Background color</b>	<p><b>Requirements:</b> Only has an effect if no video or image is specified under <b>Background video</b> and under <b>Background image</b>.</p>

Parameter	Meaning
	<p>Sets the background color of the entire page, except for the footer and header (you can set their colors separately in the color settings).</p>
<p><b>Background video</b></p>	<p>Here you can specify a web address from which a video can be loaded, which is then displayed as background.</p> <div data-bbox="555 589 1353 992" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Tip for implementation:</b> The video cannot be uploaded directly to cleverQ. Make sure that the video is located on a powerful server from which it can be loaded quickly even if the web appointments page has a large number of visitors.</p> <p>If the video is not on your own server, but on a third-party server, take into account that this server may gain knowledge about the visitors of your web appointments page when loading the video. Be aware of any valid data privacy regulations and, if necessary, adjust your privacy policy accordingly.</p> </div> <p>The video is displayed in its original size and is <i>not</i> scaled to fit the actual space. Depending on the customers' screen size and window size, this may mean that parts of the video may not always be visible.</p> <p><i>Tip: If you use a background video, we recommend uploading a background image in addition under <b>Background image</b>. If the video fails to load (for example because the server on which it is stored is temporarily unavailable), cleverQ will then use the image as a substitute.</i></p>
<p><b>Background image</b></p>	<p><b>Requirements:</b> Only has an effect if no video is specified under <b>Background video</b> or if it cannot be loaded.</p> <p>Here you can upload an image that appears as a background image on the page, except in the footer and header areas.</p> <p>The image is automatically scaled to the current window size at runtime.</p>

## Colors

**Requirements:** Note that depending on the configuration of the other parameters, some of the elements the colors of which you configure here may not always be displayed. So the corresponding color changes do not always have an immediately visible effect.

You can customize almost all the colors used on the web appointments page to your liking, including the appointment selection.

> To do so, click the respective color field.

**Tip for implementation:** When choosing colors, make sure there is sufficient contrast between texts and background colors for optimal readability. Also think about customers who may suffer from low vision or color vision impairment. Take into account that the web appointments page may be displayed to customers on screens that are not of the same quality as your own, too.

**Tip for implementation:** For confirming buttons, if possible use a color that symbolizes approval, such as a shade of green or blue. For canceling or rejecting buttons, if possible use a color that symbolizes rejection, such as a shade of red.

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## Symbols on buttons

**Requirements:** The selected symbols only appear on the web appointments page if the **Show symbols on buttons** option is enabled. Also, the **Use alternative buttons** option must be enabled.

Optionally, you can add symbols to various buttons in order to visually clarify the function of the buttons.

cleverQ supports all free symbols (category "Free") of the popular symbol library Font Awesome.

> Enter the corresponding Font Awesome code into the input field (for available symbols and codes see <https://fontawesome.com>).

Example:

If you want to use the Font Awesome symbol "fas fa-check", enter:

```
<i class="fas fa-check"></i>
```

*Tip: Alternatively or additionally, you can define individual symbols in the properties of individual services, requests, services groups and request groups. In such a case, these individual symbols replace the general symbols defined here.*

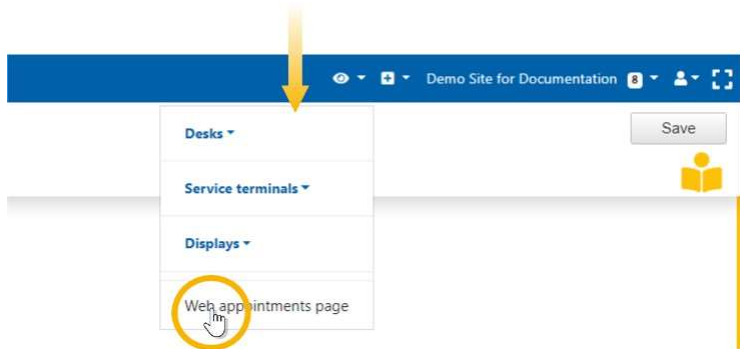
## 3.6 Access web appointments page

The web appointments page can be accessed in several ways:

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### Access from the administration interface

As long as you are logged in to the cleverQ administration interface, you can access the web appointments page at any time by clicking the "Eye" symbol in the header bar and then selecting **Web appointments page** in the menu that appears.



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### Access from a desk

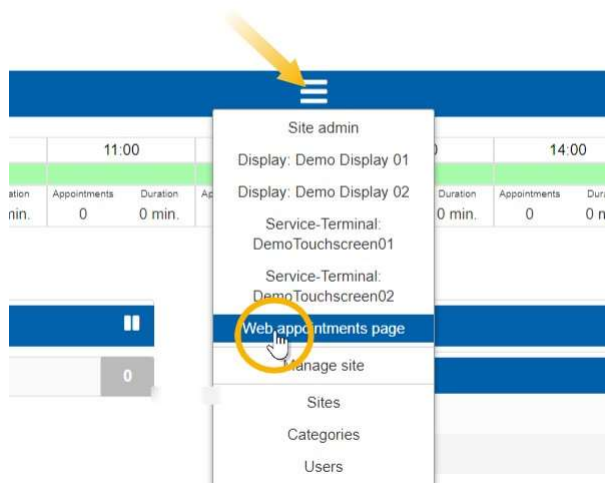
**Requirements:** The option **Allow booking appointments** must be enabled for the desk under **Desks > General permissions**. In addition, the function **Allow appointment booking at the desk** must not be disabled for the respective service under **Desks > Service-dependent permissions**.

On a desk, you can call the web appointments page by clicking the "Clock" symbol.



→ The web appointments page now appears embedded within the desk window.

Alternatively, you can access the web appointments page via the "Menu" symbol. Unlike when opening it via the symbol, the web appointments page then appears in a new browser window.



---

### Access for customers

To enable customers to access the web appointments page, you need the web address (URL) of the web appointments page. You can then either provide this URL to customers directly (for example by email), or you can link to the cleverQ web appointments page from your website.

The easiest way to determine the required URL is to call the web appointments page once from the administration interface (see the method described above) and then to copy the URL displayed in the browser's address bar.

Example:

- [https://cmq.cleverq.de/public/appointments/my\\_site/index.html?lang=de](https://cmq.cleverq.de/public/appointments/my_site/index.html?lang=de)  
calls the web appointments page in German language
- [https://cqm.cleverq.de/public/appointments/my\\_site/index.html?lang=en](https://cqm.cleverq.de/public/appointments/my_site/index.html?lang=en)  
calls the web appointments page in English language

If you omit the language specification parameter, the web appointments page appears in the language specified in the parameter **Default Language** under **Sites > Web appointments page**. Example: [https://cqm.cleverq.de/public/appointments/my\\_site/index.html](https://cqm.cleverq.de/public/appointments/my_site/index.html)

The exact URLs depend on the cleverQ server assigned to your organization and on the **Site URL name** parameter under **Sites > Settings**.

Optionally, you can include additional IDs in the URLs to ensure that a specific service or request is already preselected on the accessed web appointments page. In this way, you can, for example, provide a link to the appointment booking for exactly this service on your website right next to the description of a service.

Example:

*[https://cqm.cleverq.de/public/appointments/my\\_site/index.html?lang=de&service\\_id=12&sub-task\\_id=8](https://cqm.cleverq.de/public/appointments/my_site/index.html?lang=de&service_id=12&sub-task_id=8)*

The IDs are the IDs that appear in **Services > Index** and **Requests > Index** in the **ID** column.

---

### **Access via an appointment invitation**

If the option **Allow sending appointment invitations** is enabled for a desk under **Desks > General permissions**, the user at the desk can send a customer an appointment invitation. When doing so, cleverQ generates an email that automatically contains the web address (URL) required to call the web appointments page.

## 3.7 Web app color settings

**Requirements:** The settings made here only have an effect if the option **Allow web appointments** is enabled under **Sites > Appointment functions**.

You can customize the web appointments page, on which customers can book appointments for a site, to suit your individual needs as well as your own design guidelines.

*Note: These settings only affect the web appointments page displayed in a web browser, but not the display of appointment bookings in the cleverQ App. You can make settings for the cleverQ App under **Sites > cleverQ App**.*

---

### Call

> In the menu, select **Sites > Web app color settings**.

→ A page with the settings for the web appointments page appears.

---

### Selected site

Here you can see and select the site to be edited. The settings made only apply to this site.

**Caution:** If you change the site here, this generally switches the site for all further configuration work. Do not forget to switch back to the applicable site later in other parts of the configuration if necessary.

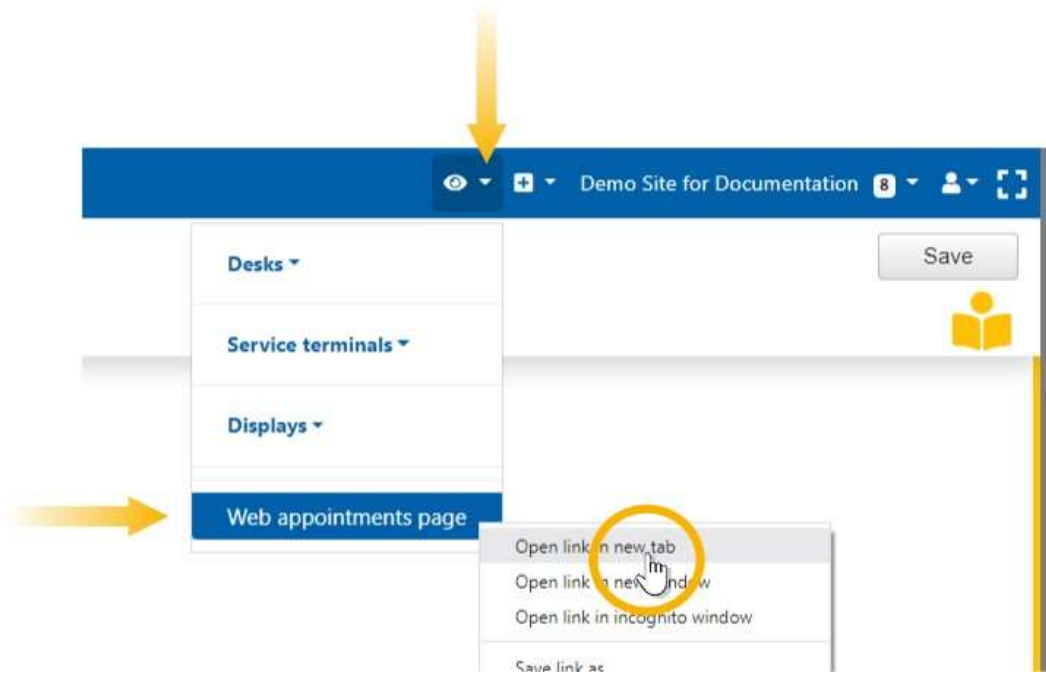
---

### Test current configuration

**Requirements:** To be able to test and check your settings in a useful way, cleverQ should already be configured to the extent that appointments can be booked. This means that services and requests should already have been created and some appointment slots should already have been made available. In addition, the appointment functions should be configured.

You can easily check how your configuration affects the appearance and functionality of the web appointments page at any time:

- 1 Click the "Eye" symbol in the header bar.
- 2 In the menu that appears, right-click **Web appointments page**.  
→ A context menu of your browser appears.



- 3 In the context menu, select **Open link in new window** or **Open link in new tab** (the exact wording depends on the browser you are using).

→ The web appointments page appears in an additional, new browser window or on another tab.

*Tip: You can keep this window or tab open continuously during configuration. In this case, however, note that you have to reload the page there each time to see a change that you have made ("Reload page" function in the browser). Also note that most changes only become active after clicking the **Save** button in cleverQ.*

---

## Colors

**Requirements:** Note that depending on the configuration of the other parameters, some of the elements the colors of which you configure here may not always be displayed. So the corresponding color changes do not always have an immediately visible effect.

You can customize almost all the colors used on the web appointments page to your liking, including the appointment selection.

> To do so, click the respective color field.

**Tip for implementation:** When choosing colors, make sure there is sufficient contrast between texts and background colors for optimal readability. Also think about customers who may suffer from low vision or color vision impairment. Also take into account that the web appointments page may be displayed to customers on screens that are not of the same quality as your own.

**Tip for implementation:** For confirming buttons, if possible use a color that symbolizes approval, such as a shade of green or blue. For canceling or rejecting buttons, if possible use a color that symbolizes rejection, such as a shade of red.

## 3.8 Set up waiting room page

**Requirements:** The settings made here only have an effect if a web appointments page is used.

Under special circumstances it may happen that too many customers access a web appointments page at the same time, all trying to make an appointment on the page. In extreme cases, this can then lead to the server being overloaded, ultimately making it impossible to book appointments at all. (Example: The demand for appointments clearly exceeds the supply. Customers know that new appointments will be made available at a certain point in time. It can then be expected that a particularly large number of customers will try to book an appointment immediately after the scheduled provision date.)

To prevent too many users from accessing the web appointments page at the same time, cleverQ can display a virtual "waiting room page" if necessary. On this page, customers are queued up in a similar way to a real waiting room and are only forwarded to the actual web appointments page when sufficient capacity is available there again.

If a customer is not aware of the time at which they are redirected to the web appointments page (for example, because a customer has minimized the browser window or is doing something else in the meantime), the validity of this customer's session ends after some time and the customer is directed to the waiting room page again. cleverQ automatically controls how quickly the session loses its validity depending on the number of new waiting customers.

*Note: Appointment bookings with an invitation code are not redirected to the waiting room page, but can always book an appointment directly.*

---

### Call

> In the menu, select **Sites > Waiting room page**.

→ A page with the settings for the waiting room page appears.

---

### Selected site

Here you can see and select the site to be edited. The settings made only apply to this site.

**Caution:** If you change the site here, this generally switches the site for all further configuration work. Do not forget to switch back to the applicable site later in other parts of the configuration if necessary.

## Settings

Parameter	Meaning
<b>Title</b>	<p>Here you can optionally specify a custom heading for the text of the waiting room page.</p> <p>If you do not enter anything here, cleverQ uses a default heading.</p>
<b>Description</b>	<p>Here you can optionally specify some custom text that will be displayed to customers on the waiting room page.</p> <p>If you do not enter anything here, cleverQ uses a default description.</p> <div><p><b>Tip for implementation:</b> If you use a custom description, the text should inform your customers why the waiting room page appears. You should also inform customers that they will be automatically redirected to the web appointments page when it's their turn.</p></div>

---

## Test waiting room page

To test how the waiting room side looks, you can proceed as follows:

- 1 Temporarily set the value for **Max booking sessions** to 1.
- 2 Open the web appointments page in an "Incognito" or "Private" window (exact name varies depending on used browser).
- 3 Open the web appointments page again in yet another "Incognito" or "Private" window.  
→ Now the waiting room page appears.
- 4 Finally, set the value for **Max booking sessions** back to its original value.

## 3.9 Design emails

cleverQ sends emails to your customers at various times, especially when booking appointments. You can adapt the appearance of these emails to your own design guidelines, and you can also adapt the links contained in the emails.

The settings apply equally to *all* emails sent by cleverQ to customers from one site.

**Important:** Depending on a customer's email program and on the configuration of that email program, not all of the settings made here may be equally visible to every customer. This applies in particular if customers have disabled the display of HTML in their email program. However, the emails are always readable even for such customers.

### Texts of the emails

The texts of the emails are preset and cannot be changed. However, if required, you can add an individual text at the end of the emails (parameters **Individual additional text** as well as **Show attachment text even if there is no attachment**).

---

### Call

> In the menu, select **Sites > Emails**.

→ A page appears with the settings for the emails sent from the site.

---

### Selected site

Here you can see and select the site to be edited. The settings made only apply to this site.

**Caution:** If you change the site here, this generally switches the site for all further configuration work. Do not forget to switch back to the applicable site later in other parts of the configuration if necessary.

---

### Email template settings

Parameter	Meaning
<b>Individual additional text</b>	Optional individual text that also appears in emails in addition to the default standard text. This text is primarily intended to refer to

Parameter	Meaning
	<p>and to explain any documents attached to the email. By default, the text therefore only appears in the emails if they have an attachment.</p> <p>However, if you wish, you can use the parameter <b>Show attachment text even if there is no attachment</b> to always have the text displayed.</p> <p><b>Formatting</b></p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;</code>info page<code>&lt;/a&gt;</code>.</p>
<p><b>Individual bulk appointment change text (header)</b></p> <p><b>Individual bulk appointment change text (content)</b></p>	<p>In special cases, multiple appointments can be postponed automatically at the same time (requires a special script available from support). In these parameters, you can define the texts that cleverQ uses to inform the affected customers about such an appointment postponement.</p>
<p><b>Individual cancellation text (header)</b></p> <p><b>Individual cancellation text (content)</b></p>	<p>If you enter some text here, this text appears in appointment cancellations sent by email instead of the standard text provided for this purpose.</p>
<p><b>Alternative text for appointment</b></p>	<p>If you enter some text here, it appears in the confirmation mail for an online meeting instead of the standard text provided for this purpose. Unlike the standard text, the meeting site is not shown here, because the meeting takes place online.</p>

## 3.10 Specify third-party tokens

**Requirements:** The settings made here only have an effect and are only required if the corresponding provider has been selected under **Services > Online meetings**.

---

### Call

> In the menu, select **Sites > Third-party tokens**.

→ A page appears with the settings for the access data of third-party providers used by the site, for example, to conduct online meetings.

---

### Selected site

Here you can see and select the site to be edited. The settings made only apply to this site.

**Caution:** If you change the site here, this generally switches the site for all further configuration work. Do not forget to switch back to the applicable site later in other parts of the configuration if necessary.

---

### Flexperto

Parameter	Meaning
Token	Token received from the provider.
Endpoint URL Flexperto	URL obtained from the provider at which the service provided by the provider is available.

---

### BigBlueButton

Parameter	Meaning
Secret	Token configured for the provider.
Endpoint URL BigBlueButton	URL where the service is available.

## 4 Opening hours and appointment provision

If you use the cleverQ appointment functions, maintaining opening hours and assigning how many appointments can be made on which days and at which times is one of the central administrative tasks in cleverQ.

**Important:** If there are multiple sites, each site has its own opening hours and appointment management.

The functions for this are essentially located under the menu items **Time settings** and **Appointment provision**.

However, there are other places in the configuration that directly or indirectly influence times and appointments:

- The parameter **Appointment slot generation mode** under **Sites > Appointment functions** determines whether and how cleverQ assigns appointment slots among the individual services.
- The parameter **Appointment slot duration** under **Sites > Appointment functions** determines the size of the time blocks used in scheduling and appointment allocation.
- When configuring the individual services, you can make further settings for appointment allocation for a service under **Services > Appointment allocation**.
- For tickets (not for appointments), you can define the general service times for individual services per weekday under **Services > Service hours for tickets**.

Topics in this section:

- [Set opening hours](#)
- [Create and edit schedule templates](#)
- [Schedule templates overview](#)
- [Create weekly schedules](#)
- [View and remove appointment slots](#)
- [Create new exception day](#)
- [Define exceptions for the appointment provision](#)
- [Edit exception day](#)
- [Holidays](#)

## 4.1 Set opening hours

The opening hours stored in the system determine on which days and at which times appointments can be made and booked in principle.

In addition, the opening hours in combination with other settings have an influence on the time from which and until which customers can pull tickets and e-tickets.

---

### Standard opening hours

To specify for each day of the week its typical opening hours:

> In the menu, select **Time settings > Opening hours**.

→ A list of all 7 weekdays appears. You can add as many time ranges as you like for each day of the week. For example, one time range for the time from morning to lunch break and a second time slot for the time after lunch break until evening.

The screenshot shows a configuration interface for opening hours. It displays three days: Wednesday, Thursday, and Friday. Each day has a blue header with a plus sign to add a new time range. Below each header, there are input fields for 'from' and 'to' times, each with a clock icon, and a red trash icon to delete the range. For Wednesday, the range is from 09:00 AM to 05:00 PM. For Thursday, there are two ranges: from 09:00 AM to 12:00 PM, and from 01:00 PM to 05:00 PM. Friday is partially visible at the bottom.

**Important:** Specify the times with the addition of "AM" or "PM". "AM" indicates all times after midnight until noon, "PM" indicated all times from noon until midnight. Examples: 8:00 AM: 8:00 AM. 12:00 noon: 12:00 PM, 5:00 PM (17:00): 5:00 PM.

To add a time range:

> Click the "Plus" symbol.

To delete a time range:

> Click the respective "Trash" symbol.

---

### Different opening hours on special days

On special days, the actual opening hours deviate from your default predefined opening hours. You can enter such special cases by creating and using special schedule templates for

the respective weeks (menu items **Appointment provision > Schedule templates and Appointment provision > Weekly schedules**).

cleverQ generally does not provide appointments on public holidays. However, you can define exceptions for this (menu items **Appointment provision > Holidays** and **Appointment provision > Exception days**).

---

### **Different opening hours for particular services**

For each service, you can define whether that service uses the site's general opening hours, or deviating hours set specifically for that service (menu items **Services > Appointment allocation** and **Services > Service hours for tickets**).

## 4.2 Create and edit schedule templates

Schedule templates are needed for the weekly scheduling under **Appointment provision > Weekly schedules**. There, the schedule template used for a particular week determines at which times on which days of the week appointments will be bookable, as well as the maximum number of appointments that can be booked.

A schedule template always covers exactly one week, but appointments do not have to be available on every day. For each day of the week from Monday to Sunday, different times and appointment slots can be available. For this reason, each day of the week is defined individually in the schedule template.

You can create as many schedule templates as you need. In many cases, however, a single schedule template for normal weeks is sufficient, supplemented if necessary by a few special schedule templates for special weeks with any special features (examples: week in which one day is closed for a company outing; week in which one day is exceptionally open on Sunday).

---

### Call

> In the menu, select **Appointment provision > Schedule templates**.

→ A window for viewing and editing the templates appears.

---

### ▼ Select management group

> Requirements: Can only be selected if at least one management group exists.

Choose the management group, for which you want to create a schedule template from the drop-down-list **Selected management group** (see [Management groups general settings](#)).

If "Default" is selected, the schedule template is created for all services.

---

### Select schedule template to be displayed and edited

> Select the schedule template to be displayed and edited from the **Selected schedule template** drop-down list.

Which templates are available here depends on which site is currently selected.

---

### Create new schedule template

> Click the **New schedule template** button.

→ A window for entering the template name appears.

*Note: Alternatively, you can click the "Plus" symbol in the header bar and then click **Schedule template** in the menu that appears.*

### View and edit schedule templates

**Important:** If you change a schedule template that has already been applied, this will not affect appointment slots that have already been created.

The schedule template view consists of one or more rows:

- The view consists of only one row if under **Sites > Appointment functions** in the parameter **Appointment slot generation mode** the option *global* is selected. In this case, all appointment slots are in this row across all services.
- The view consists of several rows if one of the options *service-related* or *hybrid* is selected under **Sites > Appointment functions** in the parameter **Appointment slot generation mode**. In this case, the appointment slots of the individual services are displayed in a separate line and, in the case of the *hybrid* mode, the appointment slots across services are displayed in another row.

*Tip: If you have defined a lot of services, you can use the **Service Filter** field to limit the display of the services shown.*

Selected schedule template ⓘ Testvorlage ▼ Service filter

New schedule template Duplicate template 🗑️

Copy 🗑️

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Demo service 01 Copy Edit 🗑️

0:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00
								S	S	S	S	S	S	S	S	S	S					

Demo service 02 Edit 🗑️

0:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	

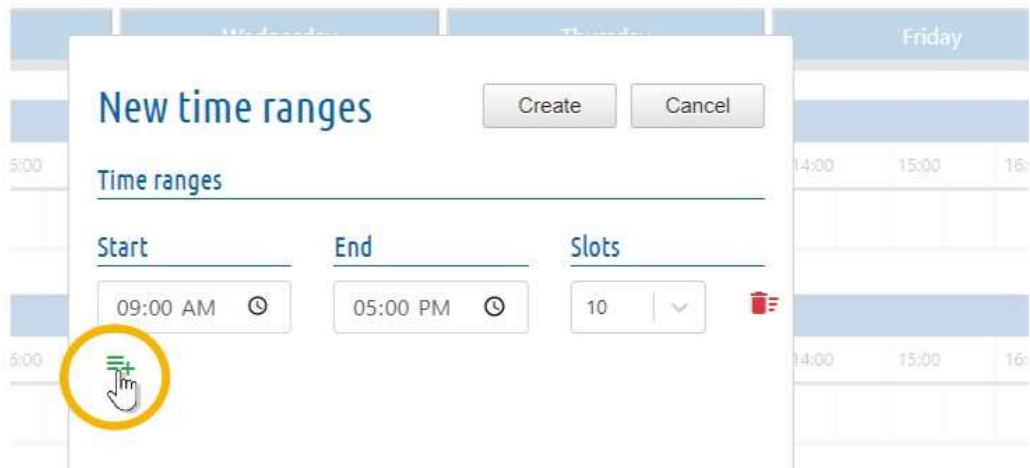
*Note: The time range displayed is always between 0:00 and 23:00.*

To see the times for a specific day of the week, click the name of the corresponding day.

To set times for a service at which cleverQ offers appointments (appointment slots):

- 1 Click the name of the first day of the week to select it, for example, **Monday**.
- 2 Click the **Edit** button at the end of the line of the service you want to edit.  
→ The **New time ranges** window appears.

- 3 Click the "Plus" symbol to create a new time range.



→ Input fields appear for the start time and end time as well as for the number of appointment slots to be provided for this time range.

Example: The appointment slot duration set for the site is 15 minutes. If you now set the number of appointment slots to a value of 1, only one appointment can be booked every 15 minutes. However, if you have, for example, 3 employees working on the service in the period in question, you can set the value to 3. In this case, 3 appointments can be booked every 15 minutes. If the selected time range lasts from 8:00 to 12:00, for example, the last 3 appointments can be booked for 11:45 so that they are completed at 12:00 as expected.

**Important:** Specify the times with the addition of "AM" or "PM". "AM" indicates all times after midnight until noon, "PM" indicated all times from noon until midnight. Examples: 8:00 AM: 8:00 AM. 12:00 noon: 12:00 PM, 5:00 PM (17:00): 5:00 PM.

- 4 Create additional time ranges if required.
- 5 Click the **Create** button.
  - The time ranges you have just created or edited now appear in color in the schedule template. The numbers indicate the maximum number of appointments that can be booked in the respective time range.
- 6 Click the name of the next day of the week and continue with it in the same way.

### Copy settings for identical services or identical days

If several services are to receive the same time ranges and the same number of appointment slots, you can save time by copying the settings from one service to other services:

- 1 Click the **Copy** button in the line of the service whose settings you want to apply to another service.  
→ A **Paste** button appears in the rows of all other services.
- 2 Click **Paste** in the line of the service for which you want to apply the settings.  
→ The copied appointment slots appear in the line of the service.
- 3 Repeat the process for additional services if needed.

If you want a day to have the same time ranges and the same number of appointment slots for all services as another day, you can copy all the settings of an entire day to another day:

- 1 Click the **Copy** button in the header area above the days of the week.
- 2 Click on the day of the week to which you want to apply the settings.
- 3 Click the **Paste** button in the header area above the days of the week.

---

### Delete schedule templates and appointment slots

**Important:** If you delete a schedule template that has already been applied, this will not affect appointment slots that have already been created.

You can delete settings at all levels if necessary:

<b>Delete schedule template as a whole</b>	> Click the "Trash" symbol at the top of the window below the schedule template selection.
<b>Delete all settings for an entire day of the week (all services)</b>	> Click the day of the week, and then click the "Trash" symbol that appears immediately above the day of the week.
<b>Delete all appointment slots for a specific day of the week and a specific service on that day of the week</b>	> Click the day of the week, and then click the "Trash" symbol at the end of the service's row.
<b>Delete individual appointment slots</b>	1 In the respective day of the week, click <b>Edit</b> in the row of the respective service.

→ The **New time ranges** window appears.

- 2 Click the "Trash" symbol in the row of the time block that you want to delete.
- 3 Click **Create**.

## 4.3 Schedule templates overview

Schedule templates are needed for the weekly scheduling under **Appointment provision > Weekly schedules**. There, the schedule template used for a particular week determines at which times on which days of the week appointments will be bookable, as well as the maximum number of appointments that can be booked.

A schedule template always covers exactly one week, but appointments do not have to be available on every day. For each day of the week from Monday to Sunday, different times and appointment slots can be available. For this reason, each day of the week is defined individually in the schedule template.

You can create as many schedule templates as you need. In many cases, however, a single schedule template for normal weeks is sufficient, supplemented if necessary by a few special schedule templates for special weeks with any special features (examples: week in which one day is closed for a company outing; week in which one day is exceptionally open also on Sunday).

---

### Call

> In the menu, select **Appointment provision > Schedule templates > Index**.

---

### Available functions

<b>Change display order</b>	<p>The order in which the services are in the table also determines the order in which customers see the services when booking appointments on the web appointments page and in the cleverQ App.</p> <p>To change the order:</p> <ul style="list-style-type: none"><li>&gt; Click the "Up arrow" or "Down arrow" symbols in the <b>Actions</b> column.</li></ul>
	<ul style="list-style-type: none"><li>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</li></ul>

## 4.4 Create weekly schedules

**Requirements:** Each weekly schedule is based on a schedule template, which must have been created beforehand (see [Create and edit schedule templates](#)).

A weekly schedule defines at which times on which weekdays of a given calendar week appointments will be bookable, and it defines the maximum number of appointments that can be booked in each case.

**Important:** Weekly schedules are a prerequisite for cleverQ to provide appointment slots for which appointments can then be booked. If there is no weekly schedule for a week, the automatic appointment allocation configured for a service under **Services > Appointment allocation** is not possible. There are then no bookable appointments for the week in question.

If a weekly schedule has been created, you can either wait for automatic appointment provisioning until appointments are bookable, or alternatively you can trigger appointment provisioning manually immediately (see description below).

---

### Call

> In the menu, select **Appointment provision > Weekly schedules**.

→ A window for providing the weekly schedules appears.

---

### ▼ Select management group

> Requirements: Can only be selected if at least one management group exists.

Choose the management group, for which you want to provide a schedule template from the drop-down-list **Selected management group** (see [Management groups general settings](#)).

If "Default" is selected, the schedule template is provided for all services.

---

### Add weekly schedule

To add a weekly schedule for a specific week to provision appointment slots:

- 1 In the table, locate the calendar week whose weekly schedule you want to create.
- 2 In the row of the calendar week, in the **Schedule template** column, select the schedule template to be applied to that week.

### Delete weekly schedule

To delete an already defined weekly schedule for a specific week and thus the already provided appointment slots:

- 1 In the table, find the calendar week whose weekly schedule you want to delete.
- 2 Click the "Calendar sheet" symbol (red) in the **Actions** column.

*Note: Only free appointment slots are deleted during the process. Appointments that have already been booked are retained.*

---


### Provision appointments manually

During operation, cleverQ automatically provides the appointments based on the created weekly schedules (parameters **Period for automatic appointment provisioning** and **Provide entire weeks** under **Services > Appointment allocation**).

However, if necessary, you can also manually provision the appointments (more precisely: appointment slots) for a specific week at any time:

- 1 In the table, find the calendar week for which you want to provide the appointment slots.
- 2 If you have not already done so, in the row of the calendar week, in the **Schedule template** column, select the schedule template to be applied for the week in question.  
→ A "Calendar sheet" symbol (gray) appears in the **Actions** column.



Automatically assigned	Actions
	


- 3 Click the "Calendar sheet" symbol (gray) in the **Actions** column.  
→ In the **Status** column, the entry changes to *online*. In the **Assigned on** column, the current date appears.




Actions


*Tip: If you now select the menu item **Appointment provisioning > Appointment slots**, you can there see the appointment slots created.*

## Columns of the table

Parameters and Functions	Meaning
Year Week	Year and corresponding calendar week for which the respective weekly schedule is valid.
Status	Shows the progress of the configuration and usage of the respective weekly schedule: <ul style="list-style-type: none"> <li>▪ <i>Not defined</i>: No weekly schedule has been defined yet.</li> <li>▪ <i>planned</i>: The schedule template to be used has already been selected for the respective calendar week. However, no appointment slots have been created yet based on the schedule template.</li> <li>▪ <i>online</i>: Appointment slots have already been created for the respective week.</li> </ul>
Appointment slots	Shows the sum of all appointment slots created according to the applied schedule template in the respective calendar week for all services together.
Schedule template	Schedule template already applied or still to be applied for the respective week.
Applied on	Time when the appointment slots were created, if the creation was triggered manually.
Automatically assigned on	Time when the appointment slots were created, if the creation was triggered automatically.
Actions	Various symbols appear here to perform an action applicable to the given calendar week: <div style="text-align: center; margin: 10px 0;">  </div> Assigns the schedule template selected in the <b>Schedule template</b> column to the respective week and creates all appointment slots for the complete week based on this template.

<b>Parameters and Functions</b>	<b>Meaning</b>
	 <p>Deletes all appointment slots not yet occupied with appointments for the week in question. (Appointments that have already been booked are retained.)</p> <p><i>Note: If the appointment slots were created automatically, the entry in the <b>Automatically assigned on</b> column is retained when they are deleted. This is only to indicate successful automatic provisioning. The appointment slots are nevertheless deleted.</i></p>

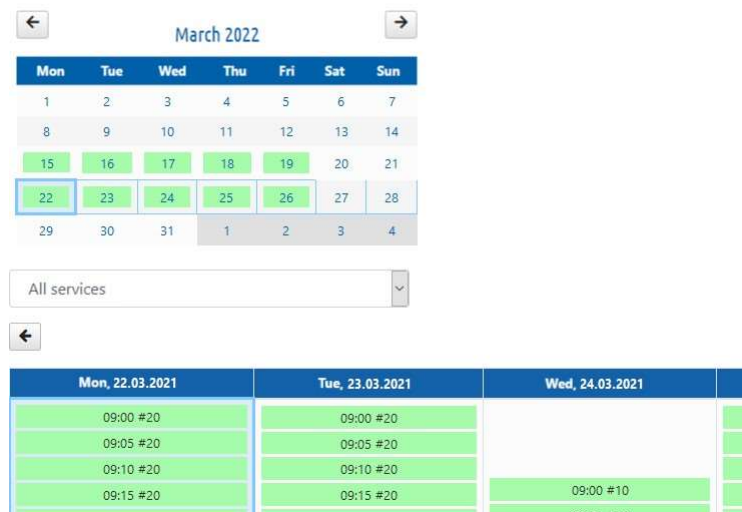
## 4.5 View and remove appointment slots

You can view the appointment calendar at any time with the appointment slots that are still available and those that are fully booked. A graphic shows you the current workload at a glance. In addition, you can remove individual or even several appointment slots from the calendar if required.

### Call

> In the menu, select **Appointment provision** > **Appointment slots**.

→ An overview of the appointment slots appears.



In the upper area the page contains a monthly view, in the lower area a weekly view of the week selected in the monthly view.

In the **monthly view**, all weeks in which appointment slots are available are highlighted in color:

- **Green:** No appointment slot is occupied yet on the respective day.
- **Yellow:** One or more appointment slots are already occupied on the respective day.
- **Red:** All appointment slots are already occupied on the respective day.

The available appointment slots are also highlighted in color in the **weekly view**:

- **Green:** There is still more than 1 free appointment slot available at the same time (if more than one has been scheduled) or exactly 1 appointment slot (if only one has been scheduled).
- **Yellow:** There is only one free slot available at the same time.

- **Red:** There are no more free appointment slots available.

The labeling of the appointment slots in the weekly view shows the start time and the number of available appointment slots for the time.



---

### Select displayed services

By default, the week view shows the appointment slots of all services in total. However, you can also limit the display to a specific individual service:

- > To do so, select the respective service from the drop-down list above the weekly view.

---

### Select displayed week

To display a specific week in the weekly view:

- > Click the week to be displayed in the monthly view.

Alternatively, you can scroll forward or backward one week step by step, by clicking the "Left arrow" symbol or the "Right arrow" symbol above the weekly view.

---

### Mark slots

Before you can delete appointment slots, you must mark them. You have several options to do this:

Action	Procedure
Mark all appointment slots of a day	Click the column name of the relevant day in the week view.
Mark individual appointment slots	Click the appointment slots to be marked one after the other.

Action	Procedure
	The appointment slots can be on different days.
<b>Invert / remove markings</b>	Click again: <ul style="list-style-type: none"><li>▪ on the column name of the day to invert the selections for the entire day; all previously selected appointment slots of the day are now unselected, all previously unselected appointment slots are selected</li><li>▪ on a single appointment slot to invert the selection for this slot only</li></ul>

*Tip: If you want to mark all appointment slots of a day except for a few exceptions, first mark all appointment slots of the day with one command and then unmark them for individual appointment slots.*

---

### Delete slots

**Requirements:** You can only delete appointment slots for which no appointment has been booked yet.

**Caution:** If the appointment slots of all services are displayed, the appointment slots of *all* services will also be deleted when you delete them. If you only want to delete appointment slots for a specific service, first select that service from the drop-down list above the weekly view.

To delete appointment slots:

- 1 Mark the appointment slots you want to delete.
- 2 Click the "Trash" symbol above the week view.

## 4.6 Create new exception day

On certain days, you may not be able to provide appointments (examples: local holiday, construction work in the house, employees at a company event). For such cases, you can define exceptions for the provisioning of appointments. Conversely, you can also define exceptions for days on which the site is usually closed, but is nevertheless open (example: opening despite a public holiday).

### ▼ Select management group

> Requirements: Can only be selected if at least one management group exists.

Choose the management group, for which you want to create an exception day from the drop-down-list **Selected management group** (see [Management groups general settings](#)).

### Create new exception

To create a new exception:

> Click the "Plus" symbol in the header bar, and then select **Exception day** in the menu that appears.

→ The **New exception day** window appears, allowing you to record when the exception should apply and why.

### Parameters

Parameter	Meaning
<b>Name</b>	Freely selectable name. The exception appears under this name in the cleverQ administration interface.
<b>Day</b>	Calendar date of the exception. cleverQ does not provide any appointments for this day.
<b>Overwrite holiday</b>	If this option is enabled, this defines the exception as an exception from the holidays stored in the system. This means: <ul style="list-style-type: none"> <li>▪ If the day in question is a holiday, cleverQ will still provide appointments for this day.</li> </ul>

Parameter	Meaning
	<ul style="list-style-type: none"><li data-bbox="555 322 1326 427">▪ If the day in question is not a holiday, cleverQ will still not provide <i>any</i> appointments for this day. (Equivalent to the default behavior when this option is not enabled.)</li></ul>

## 4.7 Define exceptions for the appointment provision

On certain days, you may not be able to provide appointments (examples: local holiday, construction work in the house, employees at a company event). For such cases, you can define exceptions for the provisioning of appointments. Conversely, you can also define exceptions for days on which the site is usually closed, but is nevertheless open (example: opening despite a public holiday).

---

### ▼ Select management group

> Requirements: Can only be selected if at least one management group exists.

Choose the management group, for which you want to define exception days, from the drop-down-list **Selected management group** (see [Management groups general settings](#)).

---

### Viewing exceptions

To see which exceptions are already stored in the system and to edit them if necessary:

> In the menu, select **Appointment provision > Exception days**.

→ A tabular list of all exceptions already stored in the system appears.

*Note: Exceptions that lie in the past are displayed in gray and can no longer be edited. They can only be deleted.*

### Edit exception

To edit the data of a exception day:

> Click the "Wrench" symbol in the **Actions** column of the table.

### Delete Exception:

To delete an exception completely from the system:

> Click the "Trash" symbol in the **Actions** column of the table.

→ This restores the system-wide default for the day.

## 4.8 Edit exception day

On certain days, you may not be able to provide appointments (examples: local holiday, construction work in the house, employees at a company event). For such cases, you can define exceptions for the provisioning of appointments. Conversely, you can also define exceptions for days on which the site is usually closed, but is nevertheless open (example: opening despite a public holiday).

---

### ▼ Select management group

> Requirements: Can only be selected if at least one management group exists.

Choose the management group, for which you want to edit an exception day, from the drop-down-list **Selected management group** (see [Management groups general settings](#)).

---

### Viewing, editing, and deleting exceptions

To see which exceptions are already stored in the system and to edit them if necessary:

> In the menu, select **Appointment provision > Exception days**.

→ A tabular list of all exceptions already stored in the system appears.

*Note: Exceptions that lie in the past are displayed in gray and can no longer be edited. They can only be deleted.*

### Edit exception

To edit the data of a exception day:

> Click the "Wrench" symbol in the **Actions** column of the table.

### Delete Exception:

To delete an exception completely from the system:

> Click the "Trash" symbol in the **Actions** column of the table.

→ This restores the system-wide default for the day.

### Parameters

Parameter	Meaning
Name	Freely selectable name. The exception appears under this name in the cleverQ administration interface.
Day	Calendar date of the exception. cleverQ does not provide any appointments for this day.

## 4.9 Holidays

Holidays define days on which cleverQ normally does not provide any appointments.

The holidays are generally predefined system-wide. Which holidays apply at a site depends on its address (country, state, city). However, you can set exceptions if needed.

---

### View stored holidays

To see which holidays are stored in the system:

> In the menu, select **Appointment provision > Holidays**.

→ A tabular list of all holidays already stored in the system appears.

*Note: Holidays that are in the past are displayed in gray color.*

---

### Define exceptions and additions

If the holidays stored in the system for the site are not correct or not complete, or if the site is open despite a holiday, you need to create appropriate exceptions (see [Define exceptions for the appointment provision](#)).

## 5 Services

A *service* represents a specific organizational unit (such as a department) or a specific line of business within your organization.

Examples:

- Government agency with the services: *citizens' office, registry office, public order office, vehicle registration office*
- Bank with the services: *credit counseling, investment counseling, account matters.*

One or more *requests* that the service provides for your organization's customers are assigned to a service (see [Requests](#)). Example: *Requesting an ID card or registering a change of residence in the citizen's office service.*

*Tickets* are always issued in relation to a specific service.

*Appointments* can be booked either for a service (if no requests are assigned to the service) or for the individual requests. Unlike requests, however, an appointment for a service can never be booked for multiple services at the same time. Also, unlike requests, services do not have so-called tasks that can be repeated (such as the registration of several cars by the same customer at a registration office). Appointments for services are therefore a bit easier and less detailed to configure than appointments for requests.

### If there is only one organizational unit (one service)

You must always create at least one service in cleverQ, even if there is only this one service. The reason for this is that certain properties can be defined for services, which then also affect the requests assigned to this service. Thus, the service level cannot be omitted.

**Tip for implementation:** In such a case, to still avoid customers having to first select this (single) service in order to then be able to book an appointment or to pull a ticket for a request, you can omit the requests level instead. Example: Instead of defining one service and 10 requests, define 10 services and no request. This then allows customers to book appointments directly for one of these 10 services or pull tickets for them on the web appointments page and in the cleverQ App. This de facto eliminates a superfluous step in the selection process and thus optimizes the user experience for your customers.

Topics in this section:

- [Show services overview](#)
- [Service general settings](#)
- [Configure ticket allocation for a service](#)

- [Configure appointment scheduling for a service](#)
- [Configure cleverQ App for a service](#)
- [Upload files and images for a service](#)
- [Set service hours for a service](#)
- [Configure follow-up appointments](#)
- [Select ticket priorities](#)
- [Set ticket priority settings](#)
- [Touchscreen settings](#)
- [Configure settings for waiting list](#)

## 5.1 Show services overview

In the services overview you can see all services defined for the site and their most important settings.

### Call

> In the menu, select **Services > Index**.

→ A tabular listing of the services appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new service directly</b>	<p>&gt; Click the <b>New Service</b> button above the table.</p> <p>→ The window for creating a new service directly appears.</p>
<b>Edit service</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the relevant service directly appears.</p>
<b>Change display order</b>	<p>The order in which the services are in the table also determines the order in which customers see the services when booking appointments on the web appointments page and in the cleverQ App.</p> <p>To change the order:</p> <p>&gt; Click the "Up arrow" or "Down arrow" symbols in the <b>Actions</b> column.</p>
	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Caution:</b> If you delete a service that still has requests or request groups assigned to it, this will not also delete those requests or request groups. If the requests or request groups are not assigned to another service, there is no longer a service that provides these requests. This means that no more appointments can be booked for the requests. If necessary, assign the requests and request groups in question to another service.</p> </div>



## 5.2 Service general settings

The general settings of a service determine how the system processes this service.

### Call

> In the menu, select **Services > General**.

→ A page with the basic data of a service appears.

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

### Options

**Important:** If requests are assigned to the selected service, these settings also affect the requests within this service.

Parameter	Meaning
<b>Ticket allocation active</b>	<p>Enables / disables the possibility to pull tickets for the service.</p> <p>This affects both a possible ticket allocation on site and the allocation of e-tickets via the cleverQ App.</p> <p><i>Note: This has no effect on tickets that have already been pulled.</i></p>
<b>Appointment allocation active</b>	<p>Enables / disables the ability to assign appointments for the service.</p> <p>If appointment allocation is disabled, neither employees can assign appointments nor customers themselves can book appointments via the web appointments page or via the cleverQ App.</p> <p><i>Note: This has no effect on appointments that have already been booked.</i></p>
<b>Visible in cleverQ App</b>	<p><b>Requirements:</b> Only has an effect if at least one of the options <b>Ticket allocation active</b> or <b>Appointment allocation active</b> is en-</p>

Parameter	Meaning
	<p>abled.</p> <p>Enables / disables the visibility of the service in the cleverQ App.</p> <p>Only if the service is visible in the cleverQ App, appointments can be booked and e-tickets can be pulled for this service via the app.</p> <p><i>Note: This setting has no effect on the visibility of the service on the web appointments page.</i></p>
<p><b>Visible only for desks</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Appointment allocation active</b> is enabled.</p> <p>If this option is enabled, the service is only displayed to the employees on the desks and is marked there with a "Lock" symbol. Accordingly, appointments can only be booked and tickets can only be created there on the desks. In this case, customers cannot book appointments or create tickets.</p> <p><i>Note: This setting has priority over the parameter <b>Visible in cleverQ App</b>.</i></p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> You can use this, for example, for special services for which customers should not be able to book appointments and request tickets themselves. Example 1: Appointments for downstream activities after an employee has already taken up the case and started processing it (follow-up appointments). Example 2: Services specifically for your own employees (for example with preferential treatment).</p> </div>
<p><b>Call tickets automatically after creation</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Ticket allocation active</b> is enabled. Also only makes sense in combination with enabled option <b>Visible only for desks</b>.</p> <p>If this option is enabled, cleverQ calls tickets for this service immediately after the tickets have been created. This saves the employee the work of having to explicitly call the ticket.</p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> You can use this, for example, for special desks where customers are served immediately – for example, at an information desk in the building entrance. Here, you could also do without using cleverQ altogether, but the creation of automatically called tickets offers you the advantage that this means that these activities are also included in the cleverQ statistics. Customers do not see these tickets.</p>
<p><b>Save and close only when a request is selected</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Must be selected when saving and closing a ticket</b> is enabled for at least one request under <b>Request &gt; General</b>.</p> <p>If this option is enabled, an employee can only close a ticket using the “Save and close” function if a specific request has been selected beforehand. This must be a request for which the option <b>Must be selected when saving and closing a ticket</b> is enabled under <b>Requests &gt; General</b>.</p> <p><i>Note: These requests are marked with a yellow symbol on the desk. If there are several such requests, it is enough to select one of them.</i></p> <p><b>Tip for implementation:</b> You can use this function, for example, to force the most accurate possible recording of processed requests. This increases the informative value of the statistics and thus improves future planning.</p>

**Other settings**

Parameter	Meaning
<p><b>Name</b></p>	<p>The service appears under this name in the cleverQ user interface.</p> <p><b>Important:</b> This name also appears when booking appointments on the web appointments page and in the cleverQ App.</p>

Parameter	Meaning
<p><b>Name(HTML)</b></p>	<p>Name used to show the service on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags &lt;br&gt; or &lt;p&gt; and &lt;/p&gt;.</p> <p>Example:            This text is &lt;b&gt;bold&lt;/b&gt;.&lt;br&gt;You can find additional information on our &lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;.</p> <div data-bbox="555 779 1353 898" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Caution:</b> The value entered in "Description in tooltip on web appointments page at service group level" overwrites this value.</p> </div>
<p><b>Name on web appointments page and in cleverQ App</b></p>	<p>The service appears under this name on the web appointments page as well as in the cleverQ App.</p> <p><i>Note: If you leave this field blank, cleverQ uses the name specified in the <b>Name</b> field on the web appointments page and in the cleverQ App.</i></p> <div data-bbox="555 1227 1353 1346" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> You can use this, for example, if the regular name is very long or too complicated for customers.</p> </div>
<p><b>Short name</b></p>	<p>Shortened name of the service. Appears on desks if the minimal view is enabled there.</p> <p><i>Note: If you leave this field empty, cleverQ uses the first letter from the entry in the <b>Name</b> field as a substitute.</i></p>
<p><b>Name in the statistics</b></p>	<p>The service appears under this name in the statistics.</p> <p><i>Note: If you leave this field blank, cleverQ uses the name specified in the <b>Name</b> field also in the statistics.</i></p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> You can use this, for example, if the regular name is too long for display in the statistics, or if you use a different name for internal purposes than for external presentation to customers.</p>
<p><b>Description in tooltip on web appointments page</b></p>	<p><b>Requirements:</b> Displayed only if the option <b>Show tooltips for services</b> is enabled under <b>Sites &gt; Web appointments page</b>.</p> <p>Info text for customers.</p> <p>This text becomes visible when a customer clicks on the small info button that appears right next to the name of the service on the web appointments page or in the cleverQ App.</p> <p><b>Tip for implementation:</b> Here you can, for example, provide some brief information on what exactly the service entails (help in selecting the applicable service) and, if necessary, what prerequisites must be met or what documents must be brought to an appointment. Keep the text as short and concise as possible – usually no longer than a few sentences.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>General description on web appointments page</b></p>	<p><b>Requirements:</b> Used only if requests are assigned to the service.</p> <p>Info text for customers.</p> <p>After a customer selects a service on the web appointments page, this text becomes visible next to the requests.</p>

Parameter	Meaning
	<div data-bbox="555 331 1350 524" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p><b>Tip for implementation:</b> In most cases, the content of this text is quite similar to the text in the parameter <b>Description in Tooltip on Web appointments page</b>. However, it may be slightly more detailed.</p> </div> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:            This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>Processing time</b></p>	<p><b>Requirements:</b> This value only has an effect if there are no requests assigned to the service, which in turn have processing times set themselves (parameters <b>Initial duration</b> and <b>Subsequent duration</b> under <b>Requests &gt; General</b>).</p> <p>Average expected processing duration provided for the processing of appointments.</p> <p><i>Note: The duration must be a multiple of the appointment slot duration specified for the site. The duration of the appointment slots is set for the site under <b>Sites &gt; Appointment functions</b>.</i></p> <p><i>Note: Unlike the processing times for requests, services do not distinguish between an initial duration and a subsequent duration, because for services it is not possible to book one appointment for multiple tasks.</i></p>
<p><b>Services group</b></p>	<p>If services groups have been defined, you can assign the service to one of these services groups here.</p> <p>For details on services groups, see <a href="#">Services groups</a>.</p>
<p><b>Management group</b></p>	<p>If management groups have been defined, you can assign the service to one of these management groups here.</p>

Parameter	Meaning
	<p>For details on management groups, see <a href="#">Management groups</a>.</p>
<p><b>Survey via desk</b></p>	<p>Provided that surveys of the type <i>Survey desk</i> have been created, you can select one of these surveys here.</p> <p>If an employee completes a task in the respective service, the relevant survey automatically starts at the end of the task on the desk.</p> <p>You can create surveys under <b>Advanced settings &gt; Surveys</b>.</p>
<p><b>Survey via email</b></p>	<p>If surveys of type <i>Survey email</i> have been created, you can select one of these surveys here.</p> <p>In this case, customers who entered their email address when booking the appointment will automatically receive an email with the survey after the appointment.</p> <p>You can create surveys under <b>Advanced settings &gt; Surveys</b>.</p> <p>You can define the time when cleverQ sends the surveys and the time period within which customers can answer the questions under <b>Sites &gt; Appointment functions</b> in the parameters <b>Send surveys after</b> and <b>Surveys become invalid after</b>.</p>
<p><b>Survey via browser ticket</b></p>	<p>If surveys of the type <b>Browser Ticket Survey</b> have been created, you can select one of these surveys here.</p> <p>After completing a browser ticket, customers will see a message inviting them to participate in a short survey. By clicking on <b>'Go to Survey'</b>, customers can answer the survey.</p>

## 5.3 Configure ticket allocation for a service

For each service, you can specify how the system assigns and processes tickets related to the service.

### Call

> In the menu, select **Services > Ticket allocation**.

→ A page with the ticket parameters appears.

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

### Basic ticket settings

Parameter	Meaning
<b>Use site opening hours</b>	<p>If this option is enabled, customers can pull tickets and e-tickets during the general opening hours set for the entire site under <b>Time settings &gt; Opening hours</b>.</p> <p>If this option is disabled, you can define your own opening hours that differ from the general site opening hours for the service under <b>Services &gt; Service hours for tickets</b>. Customers can then pull tickets and e-tickets only during these special service-specific opening hours.</p>
<b>Set individual ticket design</b>	<p>If this option is enabled, various additional parameters appear, which you can use to control the numbering of tickets individually.</p> <p>If this option is not enabled, cleverQ numbers the tickets according to the standard system with <i>A000</i> to <i>A999</i> for the first service, with <i>B000</i> to <i>B999</i> for the second service, <i>C000</i> to <i>C999</i> for the third service, etc.</p>
<b>Show pause page on the touchscreen when service is not online</b>	<p>If this option is enabled, the pause page is displayed on the touchscreen outside of the service's service hours or when the service is paused at the desk.</p>

Parameter	Meaning
<b>Ticket letter</b>	<p><b>Requirements:</b> Only available if the <b>Set individual ticket design</b> option is enabled.</p> <p>Letter preceding the issued ticket number, or a combination of several letters and characters. Example: <i>CARS-</i></p> <div data-bbox="555 524 1353 775"><p><b>Tip for implementation:</b> Here you can use, for example, the first letter of the name of the service in order to be able to immediately recognize which employee the customer should contact or to which site the customer should go in case of queries.</p><p>Mind the maximum space available on tickets and displays.</p></div>
<b>First ticket number</b>	<p><b>Requirements:</b> Only available if the <b>Set individual ticket design</b> option is enabled.</p> <p>Number of the first ticket issued. After that, the number increases by one with each ticket issued.</p> <p>The count will later start again with the first ticket number if either:</p> <ul data-bbox="555 1099 1353 1267" style="list-style-type: none"><li>▪ the number specified in the <b>Last ticket number</b> parameter has been reached</li><li>▪ the count has been automatically reset by the system (auto reset).</li></ul> <div data-bbox="555 1301 1353 1704"><p><b>Tip for implementation:</b> A <b>First ticket number</b> that differs from 1 can be useful, for example, if several services use the same ticket letter. The tickets of the services will then be differentiated by the numbers. In this case, however, you have to make sure to set the <b>Last ticket number</b> parameter accordingly so that no identical tickets with the same ticket letter and ticket number are created.</p><p>Another use case is to conceal the actual number of customers from those waiting.</p></div>
<b>Last ticket number</b>	<p><b>Requirements:</b> Only available if the <b>Set individual ticket design</b> option is enabled.</p>

Parameter	Meaning
	<p>Last ticket number that can be assigned by the system. Once this number is reached, the count starts again from the beginning with the first ticket number.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Caution:</b> Make sure to always set this number high enough to prevent the same ticket number from being repeated while the first person waiting is still inside the building. Otherwise, there would be 2 persons with the same ticket number at the same time, resulting in a possible conflict.</p> </div>

### Ticket handling and workflow

Parameter	Meaning
<p><b>Show called tickets page</b></p>	<p><b>Requirements:</b> This setting only has a function if under <b>Desks &gt; Visual settings</b> the option <b>Use inMode desk design</b> is <i>disabled</i> and at the same time under <b>Desks &gt; Additional settings</b> the option <b>Record number of processed requests</b> is <i>enabled</i>.</p> <p>If this option is enabled, when a ticket is called on the desk the booked requests and the entered customer information is displayed.</p>

### Ticket text

Parameter	Meaning
<p><b>Show waiting customers on ticket</b></p>	<p>If this option is enabled, the number of waiting customers is displayed.</p>
<p><b>Ticket text waiting customers</b></p>	<p><b>Requirements:</b> This setting only has a function if <b>Show waiting customers on ticket</b> is enabled.</p> <p>You can enter a custom text here to show the number of waiting customers.</p>

Parameter	Meaning
<b>Ticket text</b>	Optionally, you can enter a text here that will be displayed on the ticket.

#### Other settings

Parameter	Meaning
<b>Average processing time</b>	<p>In the cleverQ App, the predicted waiting time can be displayed.</p> <p>The value specified in this parameter serves as a starting value for the calculation as long as there are not yet enough values available in the system for automatic adjustment or if dynamic adjustment is not desired.</p> <p><i>Note: Which method cleverQ uses to calculate the predicted waiting time is determined by the parameter <b>Mode used for calculating waiting times</b>.</i></p>
<b>Mode used for calculating waiting times</b>	<p>Determines the method by which the system calculates the predicted waiting times:</p> <ul style="list-style-type: none"> <li>▪ <i>constant</i>: cleverQ multiplies the number of waiting tickets by the value specified in the <b>Average processing time</b> parameter.</li> <li>▪ <i>adjust up</i>: cleverQ corrects the waiting time dynamically, but only upwards. If the actual processing time is above the value specified in the <b>Average processing time</b> parameter, cleverQ calculates with the actual processing time. However, if the actual processing time is less than the value specified in the <b>Average processing time</b> parameter, cleverQ calculates using the value specified in the <b>Average processing time</b> parameter.</li> <li>▪ <i>adjust up down</i>: cleverQ dynamically corrects the waiting time both up and down. If the actual processing time is above or below the value specified in the <b>Average processing time</b> parameter, cleverQ calculates using the actual processing time.</li> </ul>

Parameter	Meaning
	<p><b>Tip for implementation:</b> If the processing time is subject to very large fluctuations, it is best to use the <i>constant</i> option for a reliable calculation, otherwise use the <i>adjust up down</i> option. Also use the <i>adjust up down</i> option if you do not know the average processing time exactly.</p> <p>The <i>adjust up</i> option is the most pessimistic one. It is suitable if you always want to be on the "safe side" with the estimate. In this case, the actual waiting times are usually somewhat lower than the forecast values. On the one hand, this can avoid displeasure among those waiting, but on the other hand it carries the risk that customers will not arrive on time because they are surprised by the unexpectedly fast call.</p>
<p><b>Min. processing time</b></p> <p><b>Max. processing time</b></p>	<p>Determine in which color the processing times are displayed in the statistics. Up to Min. = Green, from Max. = Red, in between = Orange.</p> <p><i>Note: If requests are defined, there are analogous parameters for each request, which then overwrite the values that are set here globally for the entire service.</i></p>
<p><b>Browser ticket token</b></p>	<p>Using the QR code displayed here, customers can pull an e-ticket with their cell phone in a web browser. The cleverQ App does not need to be installed for this.</p> <p>If you want to offer this service, save the displayed code as an image (to do so, right-click the code image), paste the image into a graphics or word processing editor, print out the code, and post it in a suitable place in your rooms.</p> <p>Alternatively, you can embed and display the QR code on a touchscreen.</p>

## 5.4 Configure appointment scheduling for a service

For each service, you can define how the system assigns and processes appointments related to the service.

### Call

> In the menu, select **Services > Appointment allocation**.

→ A page with appointment parameters appears.

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

### Appointment scheduling

Parameters	Meaning
<b>Only one request can be selected</b>	<p><b>Requirements:</b> Only has an effect if multiple requests are assigned to the service. Also, this parameter is only available if you have certain user rights.</p> <p>If this option is enabled, only one request can be selected per appointment when booking appointments.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> You can use this if you want to keep the individual appointments as short as possible and thus maximize planning reliability. It also increases the chance for customers to get an appointment at all in a timely manner. On the other hand, it may be annoying for customers who have multiple requests.</p> </div>
<b>Provide entire weeks</b>	<p>If this option is enabled, cleverQ always provides whole weeks when automatically providing appointment slots.</p> <p>This parameter works together with the parameter <b>Period for automatic appointment provisioning</b>.</p>

Parameters	Meaning
	<p>Example: It is Wednesday. The value for the parameter <b>Period for automatic appointment provisioning</b> is set to <i>7 days</i>. If the option <b>Provide entire weeks</b> is <i>not</i> enabled, the provisioning will be done for Thursday up to and including Wednesday of the following week (exactly 7 days). However, if the option <b>Provide entire weeks</b> is enabled, the provisioning will be done up to and including Sunday of the following week (7 days plus the whole last week filled up).</p>
<p><b>Appointments must be confirmed by an employee</b></p>	<p>If this option is enabled, an employee of your organization must explicitly confirm appointments that have been booked by customers in order for the appointments to be effectively booked.</p> <p>In this case, customers will first receive an email after booking their appointment that the appointment has been preregistered but still needs to be confirmed by a staff member. After confirmation, customers receive a second email confirming the appointment finally.</p> <p>The employee can also cancel an appointment. In this case, customers will receive a respective email with the cancellation.</p>
<p><b>Show service for info only, but do not assign any appointments.</b></p>	<p>If this option is enabled, the service is not bookable for customers on the web appointments page and in the cleverQ App. However, the service is still displayed there for information purposes.</p>
<p><b>Appointment invitation needed</b></p>	<p>If this option is enabled, customers can only book appointments for the service if they have received a special invitation from an employee of your organization.</p> <p>To do this, customers must either access the web appointments page via a special link contained in the invitation email or enter a special invitation code received from the employee on the web appointments page.</p> <p><b>Requirements:</b> For the desks that are to be authorized to send appointment invitations, the option <b>Allow sending appointment invitations</b> must be enabled under <b>Desks &gt; General permissions</b>.</p>
<p><b>Non-public</b></p>	<p>If the option is enabled, appointments for the service can only be booked via a special link.</p> <p>To create this link:</p>

Parameters	Meaning
	<p>&gt; Click the <b>Generate link in clipboard</b> button.</p> <p>→ The link is now on the clipboard and you can send it to a customer or colleague by email, for example.</p> <p><i>Note: It is possible to pre-fill customer information and make it read-only by appending parameters to the link. Add each value you want to include to the end of the link according to the pattern &amp;parameter_name=parameter_value. As a result, the complete URL looks like this, for example: https://cleverq.de/public/sites/4/appointments/index.html?lang=de&amp;given_name=Oliver. In the form for entering personal data, the relevant fields are highlighted in gray and cannot be changed by customers. The parameter names can be found under <b>Advanced settings &gt; Customer information</b> in the Name column (see &lt;%TARGETTITLE%&gt;).</i></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Tip for implementation:</b> You can use this option if a service is not to be available to the public. The link will remain permanently valid.</p> </div>
<p><b>Allow multiple bookings from the same email address</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Entering an email address is optional</b> is not enabled.</p> <p>If this option is enabled, customers can also book multiple appointments on different days under their email address (but never multiple appointments on the same day).</p> <p>If the option is not enabled, customers can basically book only a single appointment.</p>
<p><b>Allow multiple bookings on the same day</b></p>	<p>If this option is enabled, employees and customers can book as many appointments as they want on the same day even if the same email address is specified – regardless of when these appointments are to take place.</p> <p>Else, only one appointment booking for a site is possible per day and customer.</p>
<p><b>Show as unavailable</b></p>	<p>If this option is enabled, the service button is displayed in light gray on the web appointment page. Next to the service name is the note "Not available".</p>

### Appointment email settings

Parameter	Meaning
<b>Individual email confirmation message</b>	<p>Here you can optionally specify an individual text related to the respective service that appears in the confirmation e-mail for an appointment booking.</p> <p>The text appears there immediately following the standard text "Dear ... We have booked your appointment on ...".</p>

### Other settings

Parameter	Meaning
<b>Use "minimum hours before appointment" also on desks</b>	<p><b>Requirements:</b> Only has an effect if a value other than 0 is set for the <b>Minimum hours before appointment</b> parameter.</p> <p>If this option is enabled, the duration specified under <b>Minimum hours before appointment</b> also applies to appointments booked by an employee directly at a desk. Otherwise, there is no forced lead time here and an appointment booked at the desk can take place immediately.</p>
<b>Minimum hours before appointment</b>	<p>Specifies the minimum number of hours between the time the appointment is booked and the actual appointment.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Tip for implementation:</b> If there is no mandatory time lead, enter 0 as the value here.</p> </div>
<b>Period for automatic appointment provisioning (employee)</b>	<p><b>Correlations:</b> This parameter works in combination with the parameter <b>Provide entire weeks</b> in case that parameter is enabled.</p> <p>The parameter <b>Period for automatic appointment provisioning (employee)</b> selects the period for which cleverQ automatically provides the next appointment slots in each case, for which appointments can then be booked.</p> <p>(How many appointment slots cleverQ provides on each day and at what times is determined by the schedule templates – see <a href="#">Create and edit schedule templates</a>).</p>

Parameter	Meaning
	<p><i>Note: The exact hour at which the appointment slots are provisioned depends on the site-wide parameter <b>Provisioning hour</b> under <b>Sites &gt; Appointment functions</b>.</i></p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Important:</b> For cleverQ to be able to provide appointment slots at all, a weekly schedule must already have been created for the respective week. Otherwise, the system will not have any times for which it can provide appointment slots. You can create weekly schedules under <b>Appointment provision &gt; Weekly schedules</b>. There you can also trigger the provisioning of appointments manually for individual weeks at any time if required (see <a href="#">Create weekly schedules</a>).</p> </div>
<p><b>Period for automatic appointment provisioning (customer)</b></p>	<p><b>Correlations:</b> This parameter works in combination with the parameter <b>Provide entire weeks</b> in case that parameter is enabled.</p> <p>The parameter <b>Period for automatic appointment provisioning (customer)</b> selects the period for which cleverQ automatically provides the next appointment slots in each case, for which appointments can then be booked.</p> <p>(How many appointment slots cleverQ provides on each day and at what times is determined by the schedule templates – see <a href="#">Create and edit schedule templates</a>).</p> <p><i>Note: The exact hour at which the appointment slots are provisioned depends on the site-wide parameter <b>Provisioning hour</b> under <b>Sites &gt; Appointment functions</b>.</i></p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Important:</b> For cleverQ to be able to provide appointment slots at all, a weekly schedule must already have been created for the respective week. Otherwise, the system will not have any times for which it can provide appointment slots. You can create weekly schedules under <b>Appointment provision &gt; Weekly schedules</b>. There you can also trigger the provisioning of appointments manually for individual weeks at any time if required (see <a href="#">Create weekly schedules</a>).</p> </div>

Parameter	Meaning
<p><b>Appointment slot interval starts on hour</b></p> <p><b>Appointment slot interval starts on minute</b></p>	<p>These parameters influence the time when the first appointment of a day is available. Thus, they also influence the exact times of the subsequent appointments indirectly.</p> <p>The options available for the <b>Appointment slot interval starts on minute</b> parameter depend on the <b>Appointment slot duration</b> set for the site under <b>Sites &gt; Appointment functions</b>.</p> <p>If no entry is made here, the appointment slot interval starts at 0:00.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Tip for implementation:</b> You can use these parameters in particular to optimally coordinate the allocation of appointments with your opening hours.</p> </div> <p><b>Example</b></p> <p>You want your appointments to start at 7:45. Your appointment slot duration is 5 minutes. An appointment lasts 45 minutes, so you have set the value for the <b>Appointment slot interval</b> parameter to <math>45/5 = 9</math>.</p> <p>If the appointment slot count started at 0:00, appointments would only be possible at 0:00, 0:45, 1:30, 2:15, 3:00, 3:45, 4:30, 5:15, 6:00, 6:45, 7:30, 8:15, etc. For example, if the building is not unlocked until 7:30, a first appointment at 7:30 would be too early, and a first appointment at 8:15 would be too late.</p> <p>However, if you set the <b>Appointment slot interval starts on hour</b> parameter to 7 and the <b>Appointment slot interval starts on minute</b> parameter to 45, the first appointment will start at 7:45, allowing enough time for employees to get to their desks and enough time for customers to find the right room. The subsequent appointments then follow at 8:30, 9:15, 10:00, etc.</p>
<p><b>Appointment slot interval</b></p>	<p>Number of appointment slots after which an appointment can be followed by the next appointment at the earliest.</p> <p>Example: The appointment slot duration is 5 minutes. The appointment slot interval is 3 appointment slots. Thus, for example, an appointment that starts at 3:00 p.m. can be followed by the next appointment at 3:15 p.m. at the earliest.</p>

Parameter	Meaning
	<p><i>Note: You configure the <b>Appointment slot duration</b> site-wide under <b>Sites &gt; Appointment functions</b>.</i></p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> To avoid excessively long waiting times, you should match the value for <b>Appointment slot interval</b> with the value for <b>Max. time frame per appointment booked</b>. However, both values do not have to be identical.</p> </div>
<p><b>Max. number of requests per appointment booked</b></p>	<p><b>Requirements:</b> Has an effect only if multiple requests are assigned to the service. Also has an effect only if the <b>Only one request can be selected</b> option is not enabled.</p> <p>Determines the maximum number of requests of the service for which an appointment can be booked.</p> <p>If the number of requests is unlimited, select 0 as the value.</p> <p><b>Correlations:</b> The actual number of requests that can be booked may be further limited by the <b>Max. time frame per appointment booked</b> parameter, so that the number of requests specified under <b>Max. number of requests per appointment booked</b> cannot be used at all.</p>
<p><b>Max. time frame per appointment booked</b></p>	<p>Limits the total maximum time that a booked appointment may take. This in turn limits the number of requests and tasks for which the appointment can be booked.</p> <p>Example:            You have configured cleverQ so that a maximum of 7 tasks can be booked per request (parameter <b>Max. number of tasks</b> under <b>Requests &gt; General</b> = 7). Each of these requests has a processing duration of 10 minutes (parameters <b>Initial duration</b> and <b>Subsequent duration</b> under <b>Requests &gt; General</b> both = 10 minutes). There are 2 requests assigned to the service.            According to this configuration, it would be possible to book an appointment with <math>2 \times 7 = 14</math> requests for this service. This appointment would last <math>10 \times 14 = 140</math> minutes. However, if you set the value of <b>Max. time frame per appointment booked</b> to 60 minutes, for example, it follows that only a maximum of <math>60 \div 10 = 6</math> tasks can be selected for a service – for example 4 tasks for the first request and only then only 2 tasks for the second request. Or 6 tasks for the first request and 0 tasks for the second request, which would mean that</p>

Parameter	Meaning
	<p>the second request could no longer be booked for this appointment.</p> <p>If the time is unlimited, select 0 as the value.</p> <div data-bbox="555 488 1353 680"><p><b>Tip for implementation:</b> To avoid excessively long waiting times, you should match this value with the value for the <b>Appointment slot interval</b> parameter. However, both values do not have to be identical.</p></div>
<b>Avatar speech text</b>	This is the text spoken by the avatar when this service is selected.

## 5.5 Configure cleverQ App for a service

For each service, you can define various settings for how this service is displayed and processed in the cleverQ App.

### Call

> In the menu, select **Services > cleverQ App**.


→ A page with the parameters for the cleverQ App appears.

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

### E-tickets

Parameter	Meaning
Show waiting time	<p>If this option is enabled, the cleverQ App shows customers the current predicted waiting time.</p> <div><p><b>Tip for implementation:</b> One reason for enabling this option could be, for example, that you don't want customers to not pull a ticket in the first place because of the long waiting time and thus no business relationship is established. Another situation where it might make sense not to show the expected waiting time are cases where waiting times heavily change in the short term.</p></div>
Show info file	<p>If this option is enabled, customers can open a PDF file in the cleverQ App for the service in question. To do this, an info symbol appears next to the service before pulling an e-ticket or booking an appointment.</p>

Parameter	Meaning
	 <p>You can upload the info file under <b>Services &gt; Files and images</b>, parameter <b>Info PDF for cleverQ App</b>.</p>
<p><b>Allow ticket requests</b></p>	<p>Only if this option is enabled, customers can pull e-tickets with the cleverQ App.</p>

**Appointments**

Parameter	Meaning
<p><b>Show reservation code also as a QR code</b></p>	<p><b>Requirements:</b> Only required if the option <b>On-site confirmation needed</b> is enabled under <b>Sites &gt; Appointment functions</b> and the on-site confirmation is made via a QR code scanner.</p> <p>If this option is enabled, customers receive their reservation code in the cleverQ App not only in text form but also as a QR code after successfully booking an appointment via the app.</p> <p>There may then be a scanner at the site that scans this QR code from the customers' cell phones and in this way confirms the appointments and adds the customers to the queue.</p>

## Other settings

Parameter	Meaning
<b>Minimum number of active tickets</b>	<p>Sets a lower limit of active tickets. Only if there are more active tickets at a point in time than specified here customers can also request e-tickets via the cleverQ App.</p> <div data-bbox="555 577 1353 770" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Tip for implementation:</b> You can use this setting to prevent customers from requesting e-tickets even though there are no significant waiting times on site. Otherwise, these tickets might already be called before their holders are even on site.</p> </div> <p>If you don't want to set a minimum number, set the value to 0.</p>
<b>Threshold for push notification</b>	<p>Some time before their e-tickets are called, customers receive a push notification via the cleverQ App. The decisive factor for the timing of this push notification is the number of tickets that are still in the queue before a customer's ticket.</p> <p>This parameter determines how many tickets must still be in the queue before a customer's ticket in order for the customer to receive the push notification.</p> <p>If you select the option <i>Do not send push notifications</i>, the customer will not receive a push notification at all.</p>
<b>Time until a push notification is repeated</b>	<p>If a number has been set under <b>Threshold for push notification</b>, customers will receive a push notification via the cleverQ App if there is only a certain number of tickets left in front of them in the queue.</p> <p>If a customer confirms the notification in question, it is done and does not reappear. However, if the customer does not confirm the message, the customer will receive further push notifications each time after the period of time specified in the parameter <b>Time until a push notification is repeated</b> (similar to the snooze function of an alarm clock).</p> <p>If you want to disable the repeat function, select the option <i>No reminder function for push notification</i>.</p>

## 5.6 Upload files and images for a service

For each service you can upload special files and images with information material into the system. These files and images will be displayed to customers later or emailed after appointment bookings.

**Important:** Not all of the files and images uploaded here will automatically be visible. In most cases, further settings are needed for this. Please refer to the notes in the descriptions of the individual files and images.

---

### Call

> In the menu, select **Services > Files and images**.

→ A page for uploading various files appears.

---

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

---

### Add file

- 1 Click the **Browse** button at the respective file.
- 2 Select the file to be uploaded in the selection window that appears, and then click the **Open** button.  
→ A placeholder character for the file appears.
- 3 Click the **Save** button at the top right in the administration interface.  
→ Only now is the file uploaded and available in the system.

---

### Update file

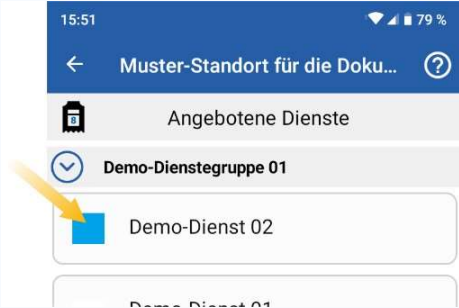

To replace a file with a new version of the same file, simply add the new file. This will automatically delete the old version and replace it with the new one.

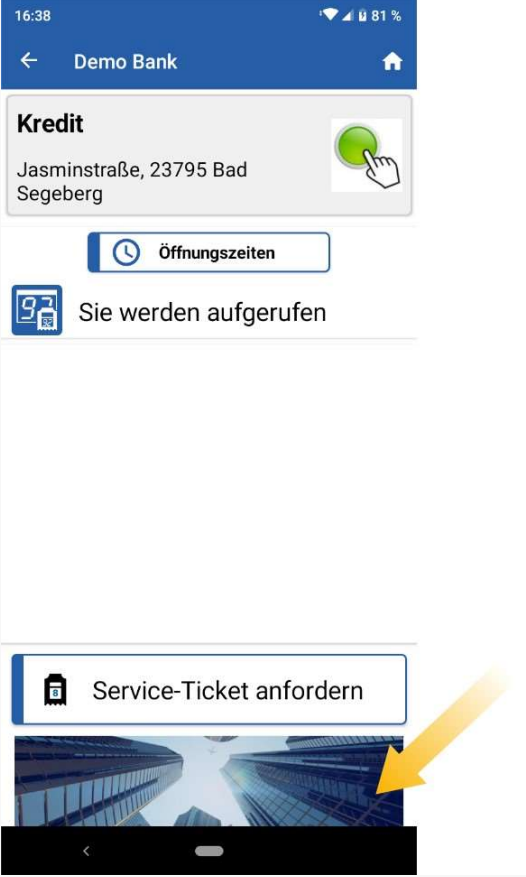
### Remove file

After uploading a file, a "Trash" symbol appears next to the file name. To delete the file from cleverQ, click this symbol.

*Note: The file is deleted immediately without having to save the page to do so.*

### Files and their usages

File	Usage
<p><b>Symbol image for cleverQ App</b></p>	<p>If available, this image appears in the cleverQ App on the service selection button.</p>  <p>Also, in the cleverQ App, after selecting the service, this image appears at the top of the app next to the name of the service.</p>  <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> It is best to use a very simple image or stylized symbol here that clearly identifies and visualizes the service.</p> </div> <p>The image should be square and automatically scales to the available size. Size approximately 72 × 72 pixels. For optimal compatibility with all devices, we recommend using PNG or JPG formats.</p>

File	Usage
<p><b>Advertising image for cleverQ App</b></p>	<p>If available, this image appears in the cleverQ App in the bottom area after selecting a service.</p>  <p><b>Tip for implementation:</b> You can either use this image as a pure advertising space, or you can use an attractive image to visually enhance the page and give it an individual touch. Preferably, use an image that also visually represents the service and has a good recognition value.</p> <p>The image should be in landscape format and is automatically scaled to the available width (depending on the customer's display device). Height 90 pixels. For optimal compatibility with all devices, we recommend using PNG or JPG formats.</p> <p><i>Tip: You can also place a hyperlink on the image and in this way enable users to open a specific webpage when they tap on the image –</i></p>

File	Usage
	<p><i>for example, a page with more detailed information about the service in question. See the <b>URL for advertising image parameter</b>.</i></p>
<p><b>Info PDF for cleverQ App</b></p>	<p><b>Requirements:</b> Only used if the option <b>Show info file</b> is enabled under <b>Services &gt; cleverQ App</b>.</p> <p>Here you can upload a PDF file to be displayed in the cleverQ App for this service. (The file appears in the cleverQ App in an integrated PDF viewer.)</p>
<p><b>Info PDF for appointment confirmations</b></p>	<p><b>Requirements:</b> Only used if the option <b>Send info file</b> is enabled under <b>Services &gt; Appointment allocation</b>.</p> <p>Here you can upload a file that customers receive as an attachment to the email confirming a successful appointment booking to the customers.</p> <div data-bbox="555 958 1353 1305" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> The file does not necessarily have to be in PDF format. You can also upload any other file. However, we recommend using the PDF format because in this case you can assume that customers will be able to view it correctly and the result of the display will always be the same. If you want to include several documents, it is best to pack them into a single PDF file by using a suitable program to combine several PDF files into a single one.</p> </div>
<p><b>Info PDF for appointment confirmations with locale</b></p>	<p><b>Requirements:</b> Only used if the option <b>Send info file</b> is enabled under <b>Services &gt; Appointment allocation</b>.</p> <p>You can upload a file here that customers receive as an attachment to the email confirming a successful appointment booking to the customers. To do this, the name of the PDF file must contain the country abbreviation at the end, e.g. info.en.pdf, info.fr.pdf or info.da.pdf. If this is not required, the standard info PDF file will be sent.</p>

File	Usage
	<div data-bbox="555 331 1353 678" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Tip for implementation:</b> The file does not necessarily have to be in PDF format. You can also upload any other file. However, we recommend using the PDF format because in this case you can assume that customers will be able to view it correctly and the result of the display will always be the same. If you want to include several documents, it is best to pack them into a single PDF file by using a suitable program to combine several PDF files into a single one.</p> </div>

## 5.7 Set service hours for a service

**Requirements:** The service hours set for a service only apply if the option **Use site opening hours** is disabled under **Services > Ticket allocation**. Otherwise, the site opening hours set under **Time setting > Opening hours** apply to the respective service.

If required, you can individually specify for each service at which times you offer this service to your customers. Customers can only request tickets and e-tickets within the specified time periods (unless the allocation of tickets is further restricted).

*Note: These settings only apply to tickets. Appointments are assigned via appointment provisioning and are independent of this.*

---

### Call

> In the menu, select **Services > Service hours for tickets**.

→ A list of all 7 weekdays appears. You can add as many time frames as you like for each day of the week – for example, one time frame for the time from morning to lunch break and a second time frame for the time after lunch break until evening.

The screenshot shows a configuration interface for setting service hours. It displays three days: Wednesday, Thursday, and Friday. Each day has a blue header with a plus sign to add more time frames. Below each day, there are input fields for 'from' and 'to' times, and a red trash icon to delete a time frame. For Wednesday, the time frame is from 09:00 AM to 05:00 PM. For Thursday, there are two time frames: one from 09:00 AM to 12:00 PM, and another from 01:00 PM to 05:00 PM. For Friday, the interface is partially visible.

---

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

---

### Edit times

**Important:** Specify times according to the scheme commonly used in English-speaking countries, with the addition of "AM" or "PM". "AM" indicates all times after midnight until noon, "PM" indicates all times from noon until midnight. Examples: 8:00 AM: 8:00 AM. 12:00 noon: 12:00 PM, 5:00 PM (5:00 PM): 5:00 PM.

To add a time frame:

> Click the "Plus" symbol.

To delete a time slot:

> Click the respective "Trash" symbol.

## 5.8 Configure follow-up appointments

Follow-up appointments are appointments that are foreseeably required at a certain time after a previous appointment. These appointments can take place in the same service as the initial appointment, or in a different service.

### Call

> In the menu, select **Services > Follow-up appointments**.

→ A page for configuring follow-up appointments appears.

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

### Settings

Parameter	Meaning
<b>Follow-up service</b>	Specifies the service for which follow-up appointments are booked.
<b>Booking mode</b>	<p>Determines whether the system automatically sets fixed follow-up appointments or whether customers can book the follow-up appointments themselves within certain intervals:</p> <ul style="list-style-type: none"> <li>▪ <i>Invitation</i>: If this option is enabled, after the first appointment is completed, customers will receive an email with an invitation to book the follow-up appointment.</li> <li>▪ <i>Fixed</i>: If this option is enabled, cleverQ automatically books a follow-up appointment at the interval specified under <b>Automatic booking in x days</b>.</li> </ul> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Important:</b> Make sure that the <i>As needed</i> option is set under <b>Services &gt; Appointment allocation</b> in the <b>Booking mode</b> parameter. This ensures that the follow-up appointment can be booked in any case, even if no free appointment slots are available otherwise at the time of the appointment.</p> </div>

Parameter	Meaning
<b>Follow-up appointment can be booked from</b> <b>Follow-up appointment can be booked until</b>	<b>Requirements:</b> Only available if under <b>Booking mode</b> the <i>Invitation</i> option is selected.  Determines the time frame within which the follow-up appointment can take place.
<b>Custom heading for booking follow-up appointments (email)</b>	Here you can optionally define a custom heading for the emails that customers receive to book the follow-up appointment, or for the emails that inform customers about a follow-up appointment that has been firmly booked by the system.  Else, the system will use a preset heading.
<b>Custom text for booking follow-up appointments (email)</b>	Here you can optionally define your own text for the emails that customers receive to book the follow-up appointment, or for the emails that inform customers about a follow-up appointment that has been firmly booked by System.  Else, the system will use a preset text.

## 5.9 Select ticket priorities

**Requirements:** Here you can only select ticket priorities if ticket priorities have been defined under **Advanced settings > Ticket priorities**.

Ticket priorities control which tickets are called first. Ticket priorities (if defined) can be assigned when an employee creates or processes a ticket at the desk.

**Tip for implementation:** You can use ticket priorities, for example, if customers are regularly sent to a service by employees of other services. The prioritized tickets are then queued at the front of the ticket list and specially marked. Forwarded customers then do not have to go through a full waiting period again, but can be called immediately.

At a reception or information desk, for example, an employee can also prioritize tickets for persons with special health conditions, or tickets for persons with small children.

In a commercial enterprise, priority could be given to regular customers, or to customers for whom the prospect of a high economic return is particularly great.

---

### Call

> In the menu, select **Services > Ticket priorities**.

→ A page appears for selecting the ticket priorities to be considered.

---

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

---

### Ticket priorities

Here you select which ticket priorities are to be considered for the service.

## 5.10 Set ticket priority settings

**Requirements:** You can only make settings here if at least one ticket priority has been enabled under **Services > Ticket priorities**.

---

### Call

> In the menu, select **Services > Ticket priority settings**.

→ A page for configuring ticket priorities appears. The list shows all ticket priorities enabled for the service under **Services > Ticket priorities**.

---

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

---

### Possible settings

Parameter	Meaning
Show name	If this option is enabled for a ticket priority, not only a color field appears when creating or editing a ticket, but also the name of the priority.
Default priority	The ticket priority selected in this column is used by cleverQ as the default when an employee creates new tickets.  <i>Note: Tickets pulled by customers themselves do in principle not have a priority.</i>

## 5.11 Touchscreen settings

A touchscreen in cleverQ is a special desk with a special user. Therefore, you can only configure touchscreen settings here, if you have created this desk and this user.

### Call

> In the menu, select **Services > Touchscreen settings**.

→ A page for configuring the touchscreen settings appears.

### Selected service

Here you can assign the touchscreen to a service. The settings made apply only to this service.

### Settings

Parameter	Meaning
<b>Show color overlay on service button</b>	<p>If this option is enabled, an overlay is displayed above the respective service button when the corresponding service is not active.</p> <p><b>Tip for implementation:</b> This setting only applies if a service is inactive, for example, due to different service hours compared to other services, or if it is marked as inactive at a specific desk.</p>
<b>Overlay color</b>	<p>Specifies the color in which the overlay is displayed.</p> <p><b>Tip for implementation:</b> It is best to use the color of the respective background so that the service button is no longer visible.</p>
<b>Appointment confirmed message</b>	<p>If you do not enter anything here, there is no text is displayed on the touchscreen.</p> <p>Otherwise, a text field is activated. Here you can optionally specify the text that is displayed on the touchscreen for the assigned service.</p>

## 5.12 Configure settings for waiting list

If the waiting list function is enabled for a service and no free appointment slots are currently available, customers can be placed on a waiting list when trying to book an appointment. If appointments are available again, an employee can invite the customer to book an appointment now.

Several steps are required to implement the waiting list. For details on the process and the steps, see [Guide – Waiting lists](#).

**Tip for implementation:** With the waiting list, you immediately create some customer loyalty and don't risk losing a prospect just because they don't start a new attempt to get an appointment.

*Note: A waiting list is not to be confused with a waiting room page, which is about avoiding a short-term overload of the web appointments page with too many simultaneous appointment bookings (see [Set up waiting room page](#)).*

### Call

> In the menu, select **Services > Waiting lists settings**.

→ A page for configuring the waiting list appears.

### Selected service

Here you can see and select the service to be edited. The settings made apply only to this service.

### Settings

Parameter	Meaning
Enabled	Only if this option is enabled, customers can use the waiting list.
Service for waiting list	<b>Requirements:</b> Here, only services can be selected for which the option <b>Appointment allocation active</b> is enabled under <b>Services &gt; General</b> .

Parameter	Meaning
	<p>Determines the replacement service for the waiting list. This service must have already been set up for this purpose. For background information, see <a href="#">Guide – Waiting lists</a>.</p>
<p><b>Description</b></p>	<p>Here you can optionally specify a text that informs your customers that there are currently no bookable appointments available and that the next click will take them to a waiting list.</p> <div data-bbox="555 629 1353 898" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Tip for implementation:</b> In addition, you can also mention, for example, what the waiting list means, how long it will take until the customer can expect to receive an invitation to book an appointment, and what happens after that. For formation on the process from the customer's point of view, see <a href="#">Guide – Waiting lists</a>.</p> </div> <p>If you leave this field blank, no text will appear. (There is no preset text.)</p>

## 6 Requests

*Requests* are the specific actions that your customers ask you to provide. Requests are relevant for appointment scheduling, tickets and e-tickets.

Examples:

- In a government agency: *apply for an ID card, report a change of residence, issue a marriage or birth certificate.*
- In a bank: *open a checking account, purchase fixed-income securities, acquire shares, apply for a real estate loan.*

Each request is assigned to one or more services that provide it. For example, the *Citizen's Office* service handles requests to *apply for an ID card* and *to report a change of residence*. The *Registrar's Office* service handles the issues of *marriage* and *issuing birth certificates*.

**Tip for implementation:** Requests can be very helpful if you provide a wide variety of services. This allows you to later evaluate statistically, for example, what the greatest demand is for. Therefore, only combine different requests into collective items if (1) you do not need individual evaluations (2) the requests are provided by the same service, require the same average processing time, and are provided by the same employees at the same desks.

**Important:** In general, defining requests is always optional. If no requests are assigned to a service, customers can book appointments and pull tickets or e-tickets for that service directly. If there is only one request for a service, it does not make sense to define it as a separate request, because then customers would first be asked for the desired service when booking appointments and pulling tickets, and then again for the desired request, but only one request would be available for selection. In this case, if no request is defined at all, customers only need to select the relevant service and then book the appointment or pull the ticket directly for this service.

Accordingly, there are some parameters for requests related to appointments and tickets that also exist for services. The following applies: **As soon as you use a request, its settings overwrite the settings of the service to which the request is assigned, if applicable.**

**Important:** If requests are defined, these requests are only used on the web appointments page and in the cleverQ App when booking appointments if the option **Use requests** is generally enabled under **Sites > Appointment functions** for the site. Otherwise, customers book appointments directly for the respective service. In this case, the employee assigns the requests after the customer meeting (in order to thus record the relevant data for the statistics).

Topics in this section:

- [Create request](#)
- [Show requests overview](#)
- [Request general settings](#)
- [Assign services to a request](#)
- [Assign info documents to a request](#)

## 6.1 Create request

You can create as many requests as you want. To create a new request:

> Click the "Plus" symbol in the header bar, and then select **Request** in the menu that appears.

→ The **New request** window appears, where you can immediately enter the main parameters of the request.

---

### Name

Name under which the request appears in the user interface, in statistics, and by default also to customers.

---

### Initial duration

Average processing time to be estimated for the required activities if the request is provided as a single service (only one tasks, not when performed multiple times for the same customer).

The times available for selection are each a multiple of the **Appointment slot duration** defined for the site under **Sites > Appointment functions**.

---

### Subsequent duration

Average duration for the repetition of the same request, if this request is provided for a customer multiple times in succession. (Example: A customer registers 3 vehicles. In this case, the following duration applies to vehicles 2 and 3 respectively). Since certain preliminary work has already been done, the **Subsequent duration** is usually shorter than the **Initial duration**. (Example: The customer's address data has already been recorded and does not need to be recorded again.)

The times available for selection are each a multiple of the **Appointment slot duration** defined for the site under **Sites > Appointment functions**.

---

### Max. number of tasks

When booking an appointment, customers can specify for how many tasks the appointment should be scheduled.

A task is an activity within the scope of a request. Example: A customer wants to register 3 cars at a registration office. These are 3 activities within the scope of the (one) request

"vehicle registration".

With this parameter, you define the maximum number of tasks for which customers can book an appointment. On the web appointments page and in the cleverQ App, customers can then only increase the number of tasks up to this value. If customers have more tasks, they must book several appointments accordingly.

**Tip for implementation:** You can use the limit on tasks, for example, to avoid occupying too large blocks of time with a single appointment. This also gives other customers a high chance of getting an appointment on the same day. At the same time, for you as the provider of the service, the risk decreases that if a customer does not show up or if a customer cancels an appointment, there will be an idle time that cannot be filled with other customers who are already waiting.

**Correlations:** The actual number of tasks that can be booked may be further limited under **Services > Appointment allocation** by the **Max. time frame per appointment booked** parameter so that the maximum number of tasks specified under **Max. number of tasks** cannot be utilized at all.

## 6.2 Show requests overview

In the request overview you can see all requests defined for the site and their most important settings.

### Call

> In the menu, select **Requests > Index**.

→ A tabular listing of the requests appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new request directly</b>	<p>&gt; Click the <b>New request</b> button above the table.</p> <p>→ The window for creating a new request directly appears.</p>
<b>Edit request</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the request in question directly appears.</p>
<b>Change display order</b>	<p>The order in which the requests are in the table also determines the order in which customers see the requests when booking appointments on the web appointments page and in the cleverQ App.</p> <p>To change the order:</p> <p>&gt; Click the "Up arrow" or "Down arrow" symbols in the <b>Actions</b> column.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"><p><b>Tip for implementation:</b> It is best to arrange the requests so that all requests provided by the same service are immediately below each other. Although the requests automatically appear grouped by the assigned service on the web appointments page and in the cleverQ App, you then have the best overview of the sequences within the individual groups.</p></div>

## 6.3 Request general settings

The general settings of a request determine how the system processes this request.

### Call

> In the menu select **Requests > General**.

→ A page with the master data of a request appears.

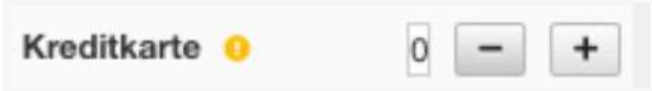
### Selected request

Here you can see and select the request to be processed. The settings made apply only to this request.

### Settings

Parameter	Meaning
<b>Allow booking of appointments</b>	<b>Requirements:</b> This option only has an effect if the <b>Use request option</b> is generally enabled under <b>Sites &gt; Appointment functions</b> for the site.  Determines whether the request is generally offered for selection when booking appointments, i.e. whether appointments can be booked for the request.
<b>For internal usage only</b>	<b>Requirements:</b> Only has an effect if the option <b>Allow appointment bookings</b> is enabled.  If this option is enabled, the request will not appear in the cleverQ App. On the web appointments page, the request will only appear if the person in question is logged into cleverQ as an employee at the same time.

Parameter	Meaning
	<p><b>Tip for implementation:</b> You can use this, for example, for special requests for which customers should not book appointments and request tickets themselves.</p> <p>Example 1: Appointments for downstream activities after an employee has already recorded the case and started processing it (follow-up appointments). Example 2: Services specifically for your own employees (e.g. with preferential treatment).</p> <p>You can also use this setting temporarily to hide individual requests from the general public without having to delete these requests for this reason and create them again later.</p>
<p><b>Show for information only (not bookable)</b></p>	<p>If this option is enabled, the request is displayed on the web appointments page and in the cleverQ App, but customers cannot book appointments for this request.</p> <p>Instead, only the text specified in the <b>Description</b> parameter for <b>Requests displayed for info only</b> appears.</p> <p><b>Tip for implementation:</b> This clarifies that you offer the request in principle, even if no online appointment booking is currently possible for it.</p> <p>You can use this, for example, if you are temporarily unable to offer online appointments for a request. The info text can then contain specific information for this request - for example, a telephone number that customers can contact as an alternative or information about when appointments for the request will be available again.</p>
<p><b>Must be selected when saving and closing a ticket</b></p>	<p><b>Requirements:</b> Only has an effect for those services for which the option <b>Save and close only on selected request</b> has been enabled under <b>Services &gt; General</b>.</p> <p>If the option <b>Must be selected when saving and closing a ticket</b> is enabled for a request, this request must be selected before an employee can close a ticket.</p>

Parameter	Meaning
	<p><i>Note: If there are multiple requests for which this option is enabled, it is sufficient if at least one of these requests is selected.</i></p> <p>Requests where the option is enabled are marked with a small yellow symbol on the desk.</p> 

### Other settings

Parameter	Meaning
<b>Name</b>	<p>Name under which the request appears in the user interface, in statistics, and by default also to customers.</p> <p><i>Tip: You can also use a different name for customers (see Name parameter on the web appointments page and in the cleverQ App).</i></p>
<b>Name(HTML)</b>	<p>Name used to show the request on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Caution:</b> The value entered in "Description in tooltip on web appointments page at service group level" overwrites this value.</p> </div>
<b>Name on web appointments page and in cleverQ App</b>	<p>Name under which customers can see the request on the web appointments page and in the cleverQ App.</p>

Parameter	Meaning
	<p>If this field is empty, the system uses the name in the <b>Name</b> field for customers.</p>
<p><b>Description in tooltip on web appointments page</b></p>	<p><b>Requirements:</b> Displayed only if the option <b>Show tooltips for requests</b> is enabled under <b>Sites &gt; Web appointments page</b>.</p> <p>Info text for customer.</p> <p>This text becomes visible when a customer clicks the small button that appears right next to the request name on the web appointments page or in the cleverQ App.</p> <div data-bbox="555 741 1353 974" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Tip for implementation:</b> Here, for example, you can provide brief information on what exactly is meant by this request (help in selecting the applicable request) and which documents are to be brought to the appointment. Keep the text as short and concise as possible - normally no longer than a few sentences.</p> </div> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <code>&lt;b&gt;bold&lt;/b&gt;</code>.<code>&lt;br&gt;</code>You can find additional information on our <code>&lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;</code>.</p>
<p><b>Description for requests that are shown for information only</b></p>	<p><b>Requirements:</b> Will only be displayed if the <b>Show for info only (not bookable)</b> option is enabled.</p> <p>This text will be visible when a customer selects create even though the <b>Show for info only (not postable)</b> option is enabled for the request.</p> <div data-bbox="555 1715 1353 1872" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Tip for implementation:</b> Here you can, for example, briefly explain why no appointments can be made for the request and how the customer should alternatively proceed.</p> </div> <p>Optionally, you can also enter HTML code in this field and in this</p>

Parameter	Meaning
	<p>way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<b>Name statistic</b>	<p>The request appears under this name in the statistics.</p> <p><i>Note: If you leave this field blank, cleverQ uses the name specified in the <b>Name</b> field also in the statistics.</i></p> <div data-bbox="555 920 1353 1115" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> You can use this, for example, if the regular name is too long for display in the statistics, or if you use a different name for internal purposes than for external presentation to customers.</p> </div>
<b>Initial duration</b>	<p>Average processing time to be estimated for the required activities if the request is provided as a single service (only one tasks, not when performed multiple times for the same customer).</p> <p>The times available for selection are each a multiple of the <b>Appointment slot duration</b> defined for the site under <b>Sites &gt; Appointment functions</b>.</p>
<b>Subsequent duration</b>	<p>Average duration for the repetition of the same request, if this request is provided for a customer multiple times in succession. (Example: A customer registers 3 vehicles. In this case, the following duration applies to vehicles 2 and 3 respectively). Since certain preliminary work has already been done, the <b>Subsequent duration</b> is usually shorter than the <b>Initial duration</b>. (Example: The customer's address data has already been recorded and does not need to be recorded again.)</p> <p>The times available for selection are each a multiple of the <b>Appointment slot duration</b> defined for the site under <b>Sites &gt; Appointment functions</b>.</p>

Parameter	Meaning
<p><b>Max. number of tasks</b></p>	<p>When booking an appointment, customers can specify for how many tasks the appointment should be scheduled.</p> <p>A task is an activity within the scope of a request. Example: A customer wants to register 3 cars at a registration office. These are 3 activities within the scope of the (one) request "vehicle registration".</p> <p>With this parameter, you define the maximum number of tasks for which customers can book an appointment. On the web appointments page and in the cleverQ App, customers can then only increase the number of tasks up to this value. If customers have more tasks, they must book several appointments accordingly.</p> <div data-bbox="555 815 1353 1162" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Tip for implementation:</b> You can use the limit on tasks, for example, to avoid occupying too large blocks of time with a single appointment. This also gives other customers a high chance of getting an appointment on the same day. At the same time, for you as the provider of the service, the risk decreases that if a customer does not show up or if a customer cancels an appointment, there will be an idle time that cannot be filled with other customers who are already waiting.</p> </div> <p><b>Correlations:</b> The actual number of tasks that can be booked may be further limited under <b>Services &gt; Appointment allocation</b> by the <b>Max. time frame per appointment booked</b> parameter so that the maximum number of tasks specified under <b>Max. number of tasks</b> cannot be utilized at all.</p>
<p><b>Min. processing time</b></p> <p><b>Max. processing time</b></p>	<p>Determine in which color the processing times are displayed in the statistics. Up to Min. = Green, from Max. = Red, in between = Orange.</p> <p>Overwrite the analog global values set for the respective service.</p>
<p><b>Avatar speech text</b></p>	<p>This is the text spoken by the avatar when this request is selected.</p>

---

**Time limit**

<b>Parameter</b>	<b>Meaning</b>
<b>Use time limit</b>	<p>If this option is enabled, appointments for the request can only be booked for the time frame defined under <b>From</b> and <b>To</b>.</p> <p><i>Note: This applies regardless of any setting for the service in question that specifies how long in advance the appointment must be booked (parameter <b>Minimum hours before appointment</b> under <b>Services &gt; Appointment allocation</b>).</i></p> <div data-bbox="555 730 1353 887"><p><b>Tip for implementation:</b> You can use this, for example, for promotion days or other special events that only take place within a limited time period.</p></div>
<b>From</b>	Provided that the option <b>Use time limit</b> is enabled, appointments for the request can only be booked from and including this day.
<b>To</b>	If the option <b>Use time limit</b> is enabled, appointments for the request are only bookable up to and including this day.

## 6.4 Assign services to a request

Each request is assigned to one or more services that provide it.

When booking an appointment, customers first select the service and are then shown a selection of only the requests assigned to that service (if cleverQ is configured to use the requests when booking appointments).

---

### Call

> In the menu, select **Requests > Services**.

→ A page appears where you can assign the requests you have already defined to the services you have already defined.

---

### Selected request

Here you can see and select the request to be processed. The settings made apply only to this request.

---

### Assigned services

Enable here the services that provide the currently edited request.

### One service per request

In most cases, you enable only one service here, which provides exactly the respective request. If there are several related requests, differentiate according to the services.

Example: A car dealership has the services "Cars" and "Commercial vehicles". A possible request for this is, for example, "Sales consultation". However, since sales talks for commercial vehicles usually take longer than for cars and typically not take place on Saturdays, it makes sense to define 2 different requests:

- "Sales consultation for passenger cars". You assign this request to the "Passenger cars" service.
- "Sales consultation for commercial vehicles". You assign this request to the "Commercial vehicles" service.

Both requests have different parameters.

### **Multiple services per request**

Occasionally, however, there are cases in which the same request is to be offered by several services in exactly the same form. In these cases, you only need to create one request and then you can assign this request to multiple services at the same time.

Example: In a public institution, there are several offices that can perform certification of documents. You create only one request "Certification" and assign all services that can provide it to this request.

## 6.5 Assign info documents to a request

Optionally, you can assign a PDF file with information to each request and upload this file to cleverQ.

In this case, all customers who book an appointment for the request receive this PDF file as an attachment to the email confirming the appointment. In addition, customers can also open this document in the cleverQ App. In this case, an info symbol appears next to the request. If a customer taps on the symbol, the PDF file opens in a PDF viewer integrated in the cleverQ App.

Alternatively or additionally, in the email you can link to a webpage with further information, provided that you yourself or a third-party provides such a page.

**Tip for implementation:** In this way, you can, for example, provide your customers with a checklist of what documents they need to bring along to the booked appointment. Or you can provide a form that customers can print out and bring to the appointment already filled out.

---

### Call

> In the menu, select **Requests > Info documents for customers**.

→ A page appears where you can assign info documents and info pages to the requests that you have already defined.

---

### Selected request

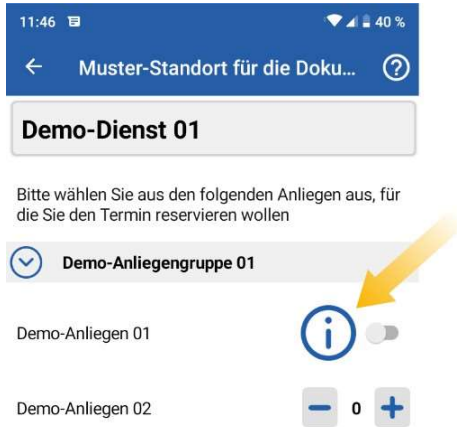
Here you can see and select the request to be processed. The settings made apply only to this request.

---

### Info PDF, Info PDF 2, Info PDF 3

Here you can upload up to three PDF files to cleverQ, that cleverQ sends as attachments together with the confirmation email after an appointment booking.

If a corresponding file is available, an info symbol also appears in the cleverQ App when the request is selected, which can also be used to display the contents of the file (a PDF viewer integrated in the cleverQ App opens).



---

### Info files with locale

Here you can upload a PDF file to cleverQ, that cleverQ sends as an attachment together with the confirmation email after an appointment booking. To do this, the name of the PDF file must contain the country abbreviation at the end, e.g. info.en.pdf, info.fr.pdf or info.da.pdf. If this is not required, the standard info PDF file will be sent.

---

### Info webpage

Web address (URL) of a webpage with further information for customers.

If a corresponding web address is entered here, a link to the respective page automatically appears in the confirmation email after an appointment is booked. (This link does not appear in the cleverQ App).

**Important:** The URL must be complete, including the protocol specification *http://* or *https://*. Example: *https://www.your-organization.org/info.html*

## 7 Desks

Desks are the pages in cleverQ on which your organization's employees call, edit, and manage tickets. Desks are also used to view statistics if this function is enabled for a desk.

*Note: In addition, special desks with vastly limited functionality must be defined for the use of touchscreens.*

For each desk, you can individually define:

- which services can be provided at this desk, and thus which tickets and which appointments the desk can process
- what is displayed on the desk
- which functions and user rights are available in detail
- which users are allowed to access and use the desk

---

### Desk groups

Optionally, you can combine several desks into desk groups (menu item **Groups > Desk groups**). These groups are used in particular to distribute alarms in a targeted manner..

Topics in this section:

- [Create desk](#)
- [Show desks overview](#)
- [Test individual desk](#)
- [Desk general settings](#)
- [Assign services to a desk](#)
- [Assign general permissions to a desk](#)
- [Assign service-dependent permissions to a desk](#)
- [Activate service-dependent emails for a desk](#)
- [Configure visual settings for a desk](#)
- [Assign users to a desk](#)
- [Desk additional settings](#)
- [Desk display settings](#)
- [Access desk](#)

## 7.1 Create desk

You can create as many different desks as you like. To create a new desk:

> Click the "Plus" symbol in the header bar, and then select **Desk** in the menu that appears.

→ The **New desk** window appears.

---

### Name

Name under which the desk appears in the cleverQ administration interface.

## 7.2 Show desks overview

In the desks overview, you can see all the desks defined for the site and their most important settings.

### Call

> In the menu, select **Desks > Index**.

→ A tabular listing of the desks appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

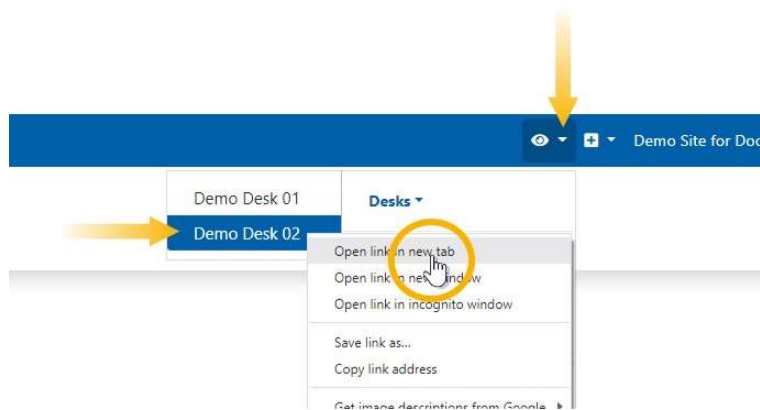
<b>Create new desk directly</b>	<p>&gt; Click the <b>New desk</b> button above the table.</p> <p>→ The window for creating a new desk directly appears.</p>
<b>Display desk (pre-view)</b>	<p>&gt; Click the "Eye" symbol in the <b>Actions</b> column.</p> <p><i>Tip: If you right-click the symbol, you can open the preview in an additional browser window or on a new tab and then keep it open continuously while you edit the configuration. (Note, however, that changes here will not be visible until the page is reloaded.)</i></p>
<b>Edit desk</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the respective desk directly appears.</p>
<b>Copy desk</b>	<p>&gt; Click the "Copy" symbol in the <b>Actions</b> column.</p> <p>→ Another desk appears in the list.</p> <div data-bbox="555 1630 1348 1787" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Important:</b> All settings are taken over from the copied desk, but <i>not</i> its users. For security reasons, you need to assign them individually to the new desk under <b>Desks &gt; Users</b>.</p> </div>

## 7.3 Test individual desk

**Requirements:** In order to be able to test and check your settings in a useful way, cleverQ should already be configured to the extent that appointments can be booked. This means that services and requests should already have been created and some appointment slots should already have been made available. In addition, the appointment functions should have been configured.

You can easily check how your configuration affects the appearance and functioning of the desks at any time:

- 1 Click the "Eye" symbol in the header bar.
- 2 Click **Desks** in the menu that appears, and then **right-click** the desk to be displayed in the submenu.  
→ A context menu of your browser appears.



- 3 In the context menu, select **Open link in new window** or **Open link in new tab** (exact wording depends on the browser used).  
→ The desk appears in an additional, new browser window or on another tab.

*Tip: You can keep this window open continuously during configuration. In this case, however, note that you need to reload the page there each time to see a change you have made ("Reload page" function in the browser). Also note that changes only become active after clicking the **Save** button in cleverQ.*

## 7.4 Desk general settings

The general settings of a desk include its activation and behavior in the overall system.

### Call

> In the menu, select **Desks > General**.

→ A page with the general settings of a desk appears.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Basic settings

Parameter	Meaning
<b>Enabled</b>	<p>If this option is enabled, the desk is active and can be used.</p> <p><i>Note: This setting does not affect the preview of the desk. The preview is always available.</i></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Tip for implementation:</b> You can disable a desk if you only need it temporarily and therefore do not want to delete it. Example: additional desk for seasonal services.</p> </div>
<b>Can control ticket output</b>	<p>If this option is enabled, the desk can enable and disable the output of tickets for the services assigned to the desk.</p> <p>Likewise, the desk can completely enable or disable entire ticket printers.</p>

### Name and frontend

Parameter	Meaning
<b>Name</b>	Name under which the desk appears in the cleverQ administration

Parameter	Meaning
	interface.
<b>Name used in statistics</b>	Name under which the desk appears in the statistics.  <b>Tip for implementation:</b> For example, you can use a shortened name here to prevent the corresponding column in the statistics from becoming unnecessarily wide. Or you can, for example, enter the same name here as in the <b>Name used on displays</b> parameter.

## 7.5 Assign services to a desk

At large sites, the services offered are often provided at desks that are specialized in a particular service each. Especially trained staff can then deal directly with the customer's specific requests.

At smaller sites in particular, however, it can also happen that one desk provides several or even all services. Such desks must then be able to assign and call tickets and appointments for multiple services, and the desks need access to the data of all of these services.

A combination of both scenarios is also possible: In this case there are desks specialized in a particular service as well as some universal desks for particularly trained employees.

In all of these cases it is also common for a service to be provided in parallel at several desks if the number of customers is large.

---

### Call

> In the menu, select **Desks > Services**.

→ A page for assigning the services appears.

---

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

---

### Assigned services

Here you enable the services that the desk can generally process.



**Tip for implementation:** If required, you can restrict certain rights for individual services (menu item **Desks > Service-dependent permissions**).

---

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

▼ Priority

Parameter	Bedeutung
Service priority in ticket list	Specifies which service is given priority at the selected desk.
	<p>Within the current section:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Create desk</a></li> <li>▪ <a href="#">Show desks overview</a></li> <li>▪ <a href="#">Test individual desk</a></li> <li>▪ <a href="#">Desk general settings</a></li> <li>▪ <a href="#">Assign general permissions to a desk</a></li> <li>▪ <a href="#">Assign service-dependent permissions to a desk</a></li> <li>▪ <a href="#">Activate service-dependent emails for a desk</a></li> <li>▪ <a href="#">Configure visual settings for a desk</a></li> <li>▪ <a href="#">Assign users to a desk</a></li> <li>▪ <a href="#">Desk additional settings</a></li> <li>▪ <a href="#">Desk display settings</a></li> <li>▪ <a href="#">Access desk</a></li> </ul> <p>Within other sections:</p> <ul style="list-style-type: none"> <li>▪ (none)</li> </ul>
	<p>Guides:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Guide – Desks</a></li> <li>▪ <a href="#">Guide – Services, requests, groups</a></li> </ul> <hr/> <p><a href="#">Open the help in a new window</a></p> <p><a href="#">Printable user manual (PDF)</a></p>



## 7.6 Assign general permissions to a desk

You can define its rights in detail for a desk and thus determine the things that users can see and do on this desk. Because each desk is also assigned to certain users (menu item **Desks > Users**), the desk-related permissions also determine the user rights of an employee working at the desk.

**Important:** In addition to the general permissions of a desk, there are also some permissions related to individual services (menu item **Desks > Service-dependent permissions**). The permissions related to individual services can further restrict the general permissions.

### Call

> In the menu, select **Desks > General permissions**.

→ A page for configuring the permissions appears.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Permissions for ticket editing

Parameter	Meaning
<b>Allow calling tickets</b>	<p>Only if this option is enabled, a menu item for calling and managing tickets appears on the desk.</p> <p>This option is also required for editing scheduled customers because appointments are always also converted into tickets when they are queued.</p> <p><i>Note: Only tickets that have been requested for one of the services assigned to the desk can be called.</i></p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> For "normal" desks, this option must always be enabled. For special desks, however, it may be useful to disable the option, for example for desks that only assign appointments or retrieve statistics.</p>
<p><b>Allow creating tickets</b></p>	<p><b>Requirements:</b> Only has an effect if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, users can create tickets at the desk.</p> <p>In addition, this option must be enabled for all desks that control a ticket printer. (One such desk must be configured for each ticket printer.)</p>
<p><b>Allow forwarding tickets</b></p>	<p><b>Requirements:</b> Only has an effect if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, users at the desk can forward a called ticket to other desks or services (the exact settings are configurable via further parameters).</p> <p><b>Tip for implementation:</b> This is useful, for example, if an employee has to pass on a difficult case to a specially trained or specially authorized colleague, or if certain requests are handled on a division of labor basis.</p>
<p><b>Forwarding to a particular desk possible</b></p>	<p><b>Requirements:</b> Only available if the <b>Allow forwarding tickets</b> option is enabled. Also only has an effect if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, users can select a specific desk to which the ticket is going to be forwarded when forwarding a ticket. Otherwise, the ticket will be forwarded to a an entire other service and any desk assigned to this service will be able to process the ticket (provided the <b>Allow calling tickets</b> option is enabled there).</p> <p><b>Important:</b> Tickets can only be forwarded to those desks for which the option <b>Can receive forwardings</b> is enabled.</p>

Parameter	Meaning
<b>Forwarding with priority possible</b>	<p><b>Requirements:</b> Only available if the option <b>Allow forwarding tickets</b> is enabled. Also only has an effect if the option <b>Allow calling tickets</b> is enabled.</p> <p>If this option is enabled, users can select whether cleverQ should queue the forwarded ticket with the corresponding service with priority when forwarding a ticket. Priority queuing means that the ticket will be placed at the front of the queue at the other service or desk so that the ticket will be called earlier than other tickets that may have been waiting longer. If the ticket does not receive priority, it will be treated like any other ticket that has just been pulled.</p> <p>If the <b>Forwarding with priority possible</b> option is not enabled, forwarded tickets are not given any priority.</p>
<b>Forwarding only to logged-in desks possible</b>	<p><b>Requirements:</b> Only available if the option <b>Allow forwarding tickets</b> is enabled. Also only has an effect if the options <b>Allow calling tickets</b> and <b>Forwarding to a particular desk possible</b> are enabled.</p> <p>If this option is enabled, tickets can only be forwarded to desks where at least one user is currently logged in, that is to desks where it can be assumed that they are also staffed.</p> <div data-bbox="555 1146 1353 1303" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Caution:</b> If this option is not enabled, this can result in a forwarded ticket not being called and the customer waiting endlessly.</p> </div>
<b>Forward and automatically call tickets</b>	<p><b>Requirements:</b> Only available if the option <b>Allow forwarding tickets</b> is enabled. Also only has an effect if the option <b>Allow calling tickets</b> is enabled.</p> <p>If this option is enabled, a ticket is automatically called after it has been forwarded.</p>
<b>Can receive forwardings</b>	<p><b>Requirements:</b> Only has an effect if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, other desks can forward tickets to the desk.</p>
<b>Allow making targeted calls</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled. Also requires that the option <b>Show next tickets</b> is enabled under <b>Desks &gt; Visual settings</b>.</p>

Parameter	Meaning
	<p>If this option is enabled, the desk can call tickets outside the order specified by the queue.</p> <p><b>Tip for implementation:</b> Possible use cases for this are, for example:</p> <ul style="list-style-type: none"><li>▪ The employee briefly looks at the requests of the waiting tickets and then preferentially calls those tickets first that they can process in a short time. This quickly reduces the number of persons waiting in the waiting area.</li><li>▪ An employee prefers to process the same requests one after the other in order to benefit from synergy effects.</li><li>▪ To process certain requests, the employee needs a second person who is temporarily not available. Therefore the employee would like to give priority to a customer with a different request.</li><li>▪ An employee wants to give priority to customers with small children or a special condition.</li></ul>
<b>Allow making silent calls</b>	<p><b>Requirements:</b> Has an effect only if the <b>Allow making targeted calls</b> option is enabled.</p> <p>If this option is enabled, an employee can make a so-called <i>silent call</i> from the configured desk.</p> <p>Unlike a classic call, a silent call does not appear on a display. Instead, the ticket is called, for example, personally by an employee.</p> <p><b>Tip for implementation:</b> In practice, a silent call can be helpful, for example, in order to prioritize certain customers without causing resentment among those waiting.</p> <p>Example: An employee in a public institution prioritizes a disabled customer, or an employee in a hospital prioritizes a particularly ill customer.</p> <p>Other waiting persons then do not see that their own ticket number is passed by the ticket number that has been prioritized on the display.</p>

Parameter	Meaning
<b>Allow closing tickets</b>	<p><b>Requirements:</b> Has an effect only if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, a button appears on the desk to immediately end the processing of a ticket. Thus, the ticket will not be closed only when the next ticket is called.</p> <div data-bbox="555 562 1353 719" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> This is interesting for statistics, for example, if an employee goes on a break or does other work immediately after processing a ticket before calling the next ticket.</p> </div>
<b>Allow closing tickets from the list</b>	<p>If this option is enabled, tickets can be closed directly out of the ticket list.</p>
<b>Allow parking tickets</b>	<p><b>Requirements:</b> Has an effect only if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, employees can park a ticket at the desk if needed.</p> <p>Parking a ticket means: The processing of the ticket is paused. In the meantime, one or more other tickets can be called and processed. Subsequently, the employee can call the parked ticket again at the desk at any time.</p> <p><i>Note: Parking should not be confused with the function "Recall". A "Recall" activates the display again if a customer does not appear at the desk after the call. This can happen both when the ticket is called for the first time, as well as when a previously parked ticket is called.</i></p> <div data-bbox="555 1473 1353 1630" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> Application example for parking tickets: A customer still has to pay a fee, must make a phone call, or something similar.</p> </div>
<b>Automatically close tickets by calling next ticket</b>	<p><b>Requirements:</b> Only has an effect if the <b>Allow calling tickets</b> option is enabled.</p> <p>If this option is enabled, cleverQ automatically closes a ticket being edited at the desk when a new ticket is called.</p>

Parameter	Meaning
	<p>Else, employees always need to manually close or park the currently called ticket before they can call a new one.</p> <div data-bbox="555 427 1353 584" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Important:</b> If this option is disabled, the <b>Allow closing tickets</b> option <i>must be</i> enabled. Otherwise, there will be no way to close a ticket once it has been called.</p> </div>
<p><b>Show button did not appear button</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled.</p> <p>If this option is enabled, a special button appears on the desk, that allows users to close a ticket directly without editing it. Example: A customer has pulled a ticket, but did not appear at the desk when the ticket was called.</p> <div data-bbox="555 931 1353 1200" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> This function is not mandatory for operating cleverQ. Users can also close a ticket using the regular ticket close button or by calling the next ticket. However, if you offer the special button for customers who did not show up, you can use it to record these cases separately for the statistics.</p> </div>
<p><b>Show button "Pause"</b></p>	<p><b>Requirements:</b> Only has an effect if the <b>Allow calling tickets</b> option is enabled. Also, under <b>Desks &gt; Visual settings</b>, the option <b>Use inMode desk design</b> must be enabled.</p> <p>If this option is enabled, a pause button appears on the desk unless a ticket is currently being edited. If the employee clicks this button, the desk is assigned the status "paused".</p> <p>In the paused state, the desk cannot receive any ticket forwardings and cannot call any tickets.</p>
<p><b>Print desk created ticket</b></p>	<p><b>Requirements:</b> This only applies if the desk has a desk printer.</p> <p>After a ticket is created at the desk, it is printed immediately via the desk printer.</p>

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**Permissions for appointment management**

Parameter	Meaning
<b>Allow managing appointment transitions</b>	<p><b>Requirements:</b> Only has an effect if the <b>Allow managing appointments</b> option is also enabled.</p> <p>If this option is enabled, users at the desk can queue up an appointment themselves at any time. For this purpose, a corresponding symbol appears in the <b>Actions</b> column on the desk.</p> <p>As a rule, this queuing occurs when a customer has confirmed that they are on site.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Caution:</b> Unless the function for automatically queuing appointments is enabled for the site in its settings (menu item <b>Sites &gt; Appointment functions</b>, parameter <b>Enqueue appointments automatically</b>), the option <b>Allow managing appointment transitions</b> must be enabled on at least one desk in order to be able to call customers with an appointment at all.</p> </div>
<b>Allow booking appointments</b>	<p>This parameter has the same function as the <b>Allow managing appointments</b> parameter.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Important:</b> For compatibility reasons, it is currently necessary to always enable or disable both parameters at the same time.</p> </div>
<b>Show button "Didn't show up"</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled.</p> <p>If this option is enabled, a special button appears on the desk, that allows users to close a ticket directly without editing it. Example: A customer has pulled a ticket, but did not appear at the desk when the ticket was called.</p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> This function is not mandatory for cleverQ operation. Users can also close a ticket using the regular ticket close button or by calling the next ticket. However, if you offer the special button for customers who did not show up, you can use it to record these cases separately for the statistics.</p>
<p><b>Allow booking appointments at desk</b></p>	<p><b>Requirements:</b> Only has an effect if the <b>Use modern appointment booking</b> option is also enabled for the desk.</p> <p>If this option is enabled, a menu item for booking appointments via the web appointments page appears on the desk.</p> <p>A corresponding symbol also appears on the desk on the <b>Pending appointments</b> page.</p> <p>This allows the desk's users to book appointments for customers as needed – for example, when a customer calls and wants to make an appointment.</p> <p><b>Important:</b> Unlike when the web appointments page is called directly in the browser (the way customers call the page), when the web appointments page is called via the desk, the services that are only visible to the desk also appear (services with the active option <b>Visible only for desks</b> under <b>Services &gt; General</b>).</p> <p>Also the web appointments page visually somewhat differs from the view for customers. For employees, the layout is simplified to enable faster work.</p> <p><b>Tip for implementation:</b> If required, you can also disable appointment booking at the desk for individual services (menu item <b>Desks &gt; Service-dependent permissions</b>, parameter <b>Allow booking appointments at the desk</b>).</p>
<p><b>Use modern appointment booking</b></p>	<p><b>Requirements:</b> Only has an effect only if the option <b>Allow booking appointments at desk</b> is also enabled.</p>

Parameter	Meaning
	<p>If this option is enabled, compared to previous versions the desk uses an optimized user interface for appointment bookings performed at the desk (recommended).</p>
<b>Allow booking appointments tenant-wide</b>	<p><b>Requirements:</b> Only has an effect if multiple sites are created.</p> <p>If this option is enabled, appointments can be booked at the desk for all sites, not just for the site where the desk is located.</p>
<b>Allow sending appointment invitations</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Appointment invitation mode only</b> is enabled under <b>Sites &gt; Appointment functions</b>.</p> <p>If this option is enabled, a menu item for creating appointment invitations appears on the desk. Users at the desk can use that menu item to create a web address (URL) and copy it to the clipboard. They can then send this web address to a customer by email, for example. The customer can use this address (and only this address) to book an appointment.</p>
<b>Allow showing waiting lists</b>	<p>If this option is enabled, the waiting list of a service can be displayed on the desk. Users of the desk can send invitations from there.</p> <p><b>Requirements:</b> Only available for those services for which a waiting list has been enabled under <b>Services &gt; Waiting list settings</b>.</p>
<b>Allow managing appointments</b>	<p>Only if this option is enabled, a menu item for appointment management appears on the desk.</p> <p>The user at the desk can then, among other things, view appointments, mark them as processed, and cancel them.</p> <div data-bbox="555 1529 1353 1722" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Important:</b> This parameter has the same function as the parameter <b>Allow booking appointments</b>. For compatibility reasons, it is currently necessary to always enable or disable both parameters.</p> </div>
<b>Show only services assigned to desk</b>	<p><b>Requirements:</b> Selecting this option is only effective, if the options <b>Allow appointment booking at desk</b> and <b>Use modern appointment booking</b> are enabled.</p>

---

Parameter	Meaning
	<p>If this option is enabled, only the services assigned in <b>Desks &gt; Services</b> can be selected when appointments are booked at a desk. So a desk can only assign appointments for services it has to offer itself.</p> <p>Otherwise, an employee can choose <i>all</i> services when booking appointments at a desk.</p>

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### Calling strategy

Determines the basic principle according to which the desk calls waiting tickets.

*Note: Tickets by targeted calls are excluded from this, provided that the option **Allow making targeted calls** is enabled under **Desks > General permissions**. In this case, the user at the desk can always make targeted calls to the ticket.*

- *service based:*

In this case, a separate button appears on the desk for the ticket call for each service assigned to the desk (that is 2 buttons for 2 services, for example). Users at the desk decide for themselves (usually based on the number of waiting tickets) for which service they call the next ticket. The ticket that is called is the ticket that is at the front of the queue of the respective service.

- *site based:*

In this case, only a single button appears on the desk for the ticket call. With this button, the user at the desk calls up the next ticket in each case, regardless of the service for which this ticket was booked (provided the desk provides this service).

## 7.7 Assign service-dependent permissions to a desk

If several services are assigned to a desk, most of the permissions apply to all of these services equally (menu item **Desks > General permissions**).

However, you can also define some permissions individually for specific services.

### Call

> In the menu, select **Desks > Service-dependent permissions**.

→ A page with an overview of all services and the permissions assigned to the selected desk in relation to the services appears.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Service permissions

Parameter	Meaning
<b>Allow creating tickets in this service</b>	If this option is enabled, employees at the desk can create tickets for the corresponding service – for example, if a customer shows up at their desk without a ticket for the service. The employees themselves or another employee at a different desk of that service can access and edit the ticket then. This ensures that the processing is properly included in the statistics.
<b>Allow calling tickets in this service</b>	If this option is enabled, employees at the desk can call tickets for the service and use them to process customer requests.  Otherwise, employees at the desk can only view the tickets for the service (example: desk used for the scheduling of the staff).
<b>Allow forwarding tickets to this service</b>	If this option is enabled, employees can forward tickets to this service and then either call them themselves and process them within that other service or have them called by other employees.  This can happen, for example, if a customer has made an appearance at an inappropriate service or if there are unexpected addi-

Parameter	Meaning
	<p>tional services that need to be provided for the customer by another service.</p>
<p><b>Allow booking appointments at the desk</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow appointment booking</b> at desk of the same name has been enabled for a desk in general under <b>Desks &gt; General permissions</b>.</p> <p>Only if the option <b>Allow appointment booking at desk</b> is enabled employees can actually book appointments directly at the desk in question.</p> <p><i>Note: Otherwise, this is only possible via the public web appointments page.</i></p>
<p><b>Show button "Don't print"</b></p>	<p>This option is specifically for desks that use a desktop printer. If this option is enabled, an additional button with the label <b>Don't print</b> appears on the desk when a ticket is created. If a ticket is created via this button, it will not also automatically be printed on paper.</p> <div data-bbox="555 1037 1353 1440" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Tip for implementation:</b> You can either use this for tickets that are only created internally – for example, for statistical evaluations. Or you can use it to save paper when it is sufficient, at the employee's discretion, to merely mention the ticket number verbally.</p> <p>This button is also needed if you want to provide the ticket to your customers on a display in the form of a QR code for the cleverQ App (operational mode <i>e-ticket</i> in in the display's settings under <b>Hardware &gt; Displays &gt; General</b>).</p> </div>
<p><b>Show in calendar</b></p>	<p>Only if this option is enabled, appointments for the service appear in the calendar on the workstation.</p> <p>By disabling the option, you can hide certain services in the calendar if needed.</p>
<p><b>Play notification sound</b></p>	<p><b>Requirements:</b> <b>Notification-sound for new ticket</b> and <b>Pop-up for new ticket</b> have to be enabled under <b>Desks &gt; Visual settings</b>.</p> <p>If this option is enabled, a notification sound is played and a pop-up appears when a new ticket is created.</p>

<b>Parameter</b>	<b>Meaning</b>
	By deactivating this option, you can prevent employees from receiving notifications for services to which they are not assigned.

## 7.8 Activate service-dependent emails for a desk

If an appointment is booked or canceled at a desk, the respective employee can additionally receive corresponding e-mails about this.

**Requirements:** The settings made on this page only have an effect if the option **Allow booking appointments at the desk** is activated under **Desks > Service-dependent permissions** for a service. In order for a specific user to receive e-mails from cleverQ, the option **Receives appointment confirmation emails** also needs to be activated for this user in their user profile under **Users > General**, and a unique, valid e-mail address must be specified for the user in the **Email** field under **Users > General** as well.

### Call

> In the menu, select **Desks > Service-dependent emails**.

→ A page appears with an overview of all configured services and an option to switch the emails on or off that can be sent by the system for each of these services.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Settings

Parameter	Meaning
<b>Appointment booking</b>	cleverQ sends an e-mail when an appointment has been booked at the desk.
<b>Appointment cancellation</b>	cleverQ sends an e-mail when an appointment has been canceled at the desk.
<b>Appointment confirmation on site</b>	cleverQ sends an e-mail when an appointment has been confirmed on site at the desk.

## 7.9 Configure visual settings for a desk

In part, the things displayed at a desk result from the permissions defined for the desk (settings under the menu item **Desks > General permissions**). Other functions can be switched on or off directly according to the respective requirements of a desk.

### Call

> In the menu, select **Desks > Visual settings**.

→ A page for configuring the displayed elements appears.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Display elements

Parameter	Meaning
<b>Show next tickets</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled under <b>Desks &gt; General permissions</b>.</p> <p>If this option is enabled, the desk shows a list of all waiting tickets. Otherwise, only the ticket that is currently being processed can be seen on the desk.</p>
<b>Show "Requests" column in ticket list</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Use inMode desk design</b> is also enabled.</p> <p>If this option is enabled, a column with the requests and their respective number appears on the desk in the ticket list.</p>
<b>Show appointment created at column in appointmentlist</b>	<p>If this option is enabled, a column with the times when the appointments were created appears on the desk in the ticket list.</p>
<b>Show appointment deleted at column in appointmentlist</b>	<p>If this option is enabled, a column containing the time, when an appointment was canceled appears in the ticket list and the reports.</p>

Parameter	Meaning
Show appointment canceled by user column in appointmentlist	If this option is enabled, a column appears in the appointment list at the desk in which either the employee's abbreviation or "Customer" is displayed, depending on who has canceled the appointment.
Show appointment date column in appointmentlist	If this option is enabled, a column containing the date, when the appointment takes place, appears in the appointment list and the appointments are sorted by date and time.
Show "Customer information" column in ticket list	<p><b>Requirements:</b> Only has an effect if the option <b>Use inMode desk design</b> is enabled.</p> <p>If this option is enabled, a column with information about the customers for whom the tickets were created appears on the desk in the ticket list.</p>
Show service groups column in appointment and ticket list	If this option is enabled, a column showing the service group will appear in the appointment and ticket list.
Show request groups column in appointment and ticket list	If this option is enabled, a column showing the request group will appear in the appointment and ticket list.
Show longest waiting tickets	<p>If this option is enabled, employees can display a list with the tickets that have been waiting the longest on the desk.</p> <p><i>Note: In general, only those tickets are displayed whose waiting time is above the value set in the parameter <b>Threshold for red indicator</b> under <b>Sites &gt; Settings</b>.</i></p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> In practice, the list can be used to selectively call tickets that have already been waiting for a particularly long time in between and thus avoid extreme peaks in waiting times.</p> </div>
Allow minimal view	If this option is enabled, an symbol for opening the minimal view appears on the desk.

Parameter	Meaning
	<p>The minimal view shows only the most elementary information and functions in a new browser window:</p> <ul style="list-style-type: none"> <li>▪ number of waiting tickets per service</li> <li>▪ button for calling the next ticket as well as for recalling a ticket that has already been called</li> </ul> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> Employees can, for example, place the minimal view next to the window of the software they use to process customer requests. Then employees do not need to switch between the window of the processing software and cleverQ during routine operation.</p> </div>
<p><b>Show calendar with booked appointments</b></p>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow managing appointments</b> is enabled under <b>Desks &gt; General permissions</b>.</p> <p>If this option is enabled, a calendar appears on the <b>Upcoming appointments</b> page. In this calendar, the user can select individual days at the desk and view the appointments that have already been booked or canceled for these days.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> If the calendar is not shown, this saves space on the screen and makes the page appear less crowded. On the other hand, in this case the list of displayed appointments can become very long.</p> <p>Especially if there is a high volume of individual appointments, it therefore usually is best to show the calendar. If there are only a few individual appointments, it may be clearer to hide the calendar.</p> </div>
<p><b>Show waiting times (green/yellow/red)</b></p>	<p>If this option is enabled, the display of waiting times is highlighted in color on the desk, depending on the duration of the respective waiting time.</p> <p><i>Note: The point when the color changes from green to yellow as well as from yellow to red when reaching particular waiting times is set for the entire site under <b>Sites &gt; Settings</b>.</i></p>

Parameter	Meaning
<b>Show number of waiting tickets</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled under <b>Desks &gt; General permissions</b>. Also only has an effect if the option <b>Use inMode desk design</b> is not enabled.</p> <p>If this option is enabled, a text line "Customers on site:" appears at the top right of the desk, followed by the number of customers currently waiting.</p>
<b>Show workload overview</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled under <b>Desks &gt; General permissions</b>.</p> <p>If this option is enabled, a daily overview appears on the desk in the upper area of the ticket call page. This overview shows individually for each hour:</p> <ul style="list-style-type: none"> <li>▪ the number of appointments booked for this hour</li> <li>▪ the total amount of time occupied by the appointments in this hour</li> </ul>
<b>Show only own parked tickets</b>	<p><b>Requirements:</b> Only has an effect if the options <b>Allow calling tickets</b> and <b>Allow parking tickets</b> are enabled under <b>Desks &gt; General permissions</b>.</p> <p>If this option is enabled, only those parked tickets appear on the desk on the ticket call page that have been parked at the same desk.</p>
<b>Show closed tickets</b>	<p>Enabling this option activates a list consisting of the tickets that were closed on this day. It includes the information entered about customers while handling the ticket.</p>
<b>Show only own closed tickets</b>	<p><b>Requirements:</b> Only effective if the option <b>Show closed tickets</b> under <b>Desks &gt; General Permissions</b> is activated.</p> <p>If this option is enabled, only tickets closed at this desk are shown on the list of closed tickets.</p>
<b>Show common button for tickets of all services</b>	<p><b>Requirements:</b> Only has an effect if the option <b>Allow calling tickets</b> is enabled under <b>Desks &gt; General permissions</b>.</p> <p>If this option is enabled, a separate button for creating tickets appears on the desk for each service. Else, only one common button for all services appears and users have to select the desired service from a list in the ticket creation dialog each time.</p>

Parameter	Meaning
	<p><b>Tip for implementation:</b> Preferably enable this option if a large number of tickets are created at the desk. If, on the other hand, tickets are rarely created at that desk, it is more simple not to clutter the desk with numerous buttons that are only rarely needed.</p>
<b>Show appointment notes on active call</b>	If this option is enabled, the appointment notes are displayed between the customer information and the requests in the current call.
<b>Use inMode desk design</b>	<p>This option enables the newer version of the user interface of the desks ("inMode").</p> <p>On a desk in the "inMode" design, the "Create ticket" and "Call ticket" functions are available on a shared page. Users therefore no longer need to switch between 2 pages for these purposes. In addition, some functions, such as the "Pause" function, are only available on desks in "inMode". The display of information on appointments and forwarded tickets is also improved compared to classic desks.</p> <p><b>Tip for implementation:</b> We recommend to always enable the "inMode" design for new installations.</p>

## Audio

Parameter	Meaning
<b>Notification sound for new ticket</b>	If this option is enabled, a short notification tone will sound at the desk when a customer or another employee request a new ticket. However, the tone will only sound if the new ticket is added to a queue that is still empty at that time.

Parameter	Meaning
	<p><b>Tip for implementation:</b> This function is particularly useful in the case of irregular public traffic. Employees can then concentrate on other work without having to keep a permanent eye on cleverQ to see if new customers are waiting.</p> <p><i>Note: The tone is fixed and cannot be changed.</i></p>
<b>Pop-up for new ticket</b>	<p><b>Requirements:</b> Only available if the option <b>Notification sound for new ticket</b> is enabled.</p> <p>If this option is enabled, a pop-up window with a message appears on the desk in addition to the notification sound.</p> <p><i>Note: Having only a pop-up window without any sound is not possible.</i></p>

## 7.10 Assign users to a desk

Users can only access and use a desk if they are assigned to the desk in the configuration.

*Note: A user can be assigned to any number of desks at the same time. In this case, the user can select the desired desk via the menu after logging in to cleverQ. If the user is only assigned to a single desk, this single desk will open automatically after logging in.*

---

### Call

> In the menu, select **Desks > Users**.

→ A page for assigning users appears.

---

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

---

### Assigned users

Here you activate the users who should be able to access and work with the desk.

## 7.11 Desk additional settings

In part, the things displayed at a desk result from the permissions set for the desk (setting under the menu item **Desks > General permissions**). Other functions can be switched on or off directly according to the specific requirements of a desk (setting under the menu item **Desks > Visual settings**).

There are also various additional settings.

### Call

> In the menu, select **Desks > Additional settings**.

→ A page for making various additional settings appears.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Surveys

Parameter	Meaning
Enable surveys	<p><b>Requirements:</b> The <b>Activate surveys</b> option must be enabled for the site under <b>Sites &gt; Settings</b>.</p> <p>If this option is enabled, a symbol for opening the survey statistics appears on the desk.</p> <p>This allows users at the desk to view the results of the surveys conducted.</p> <p>In addition, this option controls whether users can conduct a survey themselves at the desk, provided that this survey has been defined and is assigned to the edited service (menu item <b>Services &gt; General</b>, parameter <b>Survey via desk</b>). To call the survey, a corresponding button appears on the desk when editing a ticket.</p>

---

**Printers**

<b>Parameter</b>	<b>Meaning</b>
<b>Printer template</b>	(This function is currently still under development. Please leave this value at the default.)

## 7.12 Desk display settings

The display settings for a desk include its behavior when displaying information.

### Call

> In the menu, select **Desks > Display Settings**.

→ A page with the display settings of a desk appears.

### Selected desk

Here you can see and select the desk to be edited. The settings made apply only to this desk.

### Additional desk settings

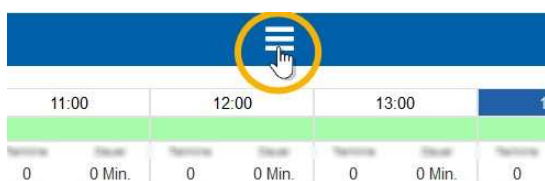
Parameter	Meaning
<b>Remove call from display after certain actions at desk</b>	<p>Normally, processed tickets slide further and further down on a display until they finally disappear from the display altogether.</p> <p>If this option is enabled, a ticket disappears from the display immediately after the ticket has been closed, forwarded, or parked.</p>
<b>Name used on displays</b>	<p>Name under which the desk appears on displays in the waiting area.</p> <p>Usually this is a number or a short combination of letters and digits. Examples: <i>1, C01, Counter-1</i></p>
<b>Color on the display</b>	<p><b>Requirements:</b> Has an effect only for those displays for which the option <b>Show desk colors</b> is enabled under <b>Hardware &gt; Displays &gt; General</b>.</p> <p>Selects the background color used to display the ticket numbers called for the desk.</p>
<b>Override the displays spoken text</b>	<p>Here you can optionally enter a custom, desk-specific text to be spoken on the display. If the field is left empty, the text set in the display settings will be spoken.</p>

Parameter	Meaning
	<div data-bbox="555 331 1350 450"><b>Tip for implementation:</b> This setting only applies if <b>TTS (text-to-speech)</b> output is enabled for the display.</div>

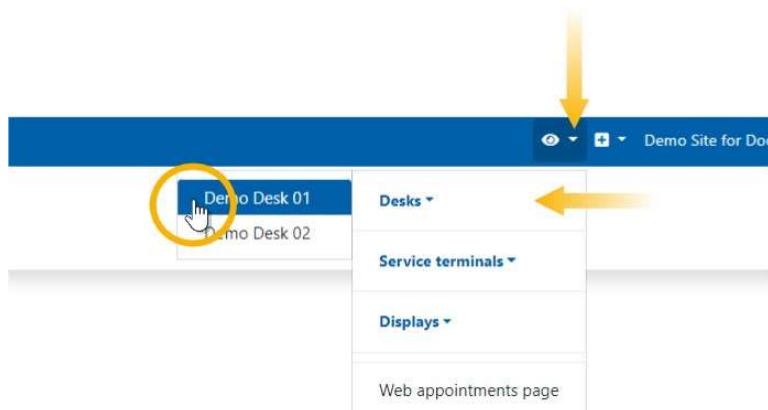
## 7.13 Access desk

To display a cleverQ desk on an office computer, the following options are available in principle:

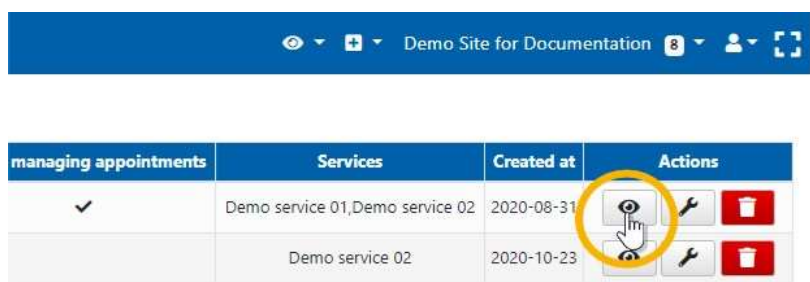
- If a user has the user role *User*, and this user is only assigned to one single desk, this desk appears immediately after login.
- If a user has the user role *User* and is assigned to multiple desks, the first of these desks appears immediately after login. If necessary, the user can switch to one of the other desks assigned to them via a menu in the header bar.



- If a user has administration rights, the administration interface appears first after logging in to cleverQ. There the user can display a desk:
  - by clicking the "Eye" symbol in the header bar and then selecting the desk to be displayed in the menu that appears under **Desks**



- by clicking the "Eye" symbol in the **Actions** column in the row of the desired desk under the menu item **Desks > Index**



**Tip for implementation:** We recommend creating a bookmark (favorite) for the main page of the desk in your web browser when you open the desk for the first time. So you can open the desk directly during subsequent sessions.

## 8 Users

Users are the employees of an organization that uses cleverQ. Users have their own permanent user access with an individual user name and password.

Users configure and maintain the system, can assign appointments, and process customer requests.

*Note: In addition, a special user with highly restricted rights needs to be defined for the use of touchscreens.*

**Important:** Customers are *not* referred to as users within cleverQ and are not to be confused with users!

Each user is assigned a specific role and specific user rights via this role. The user rights determine which functions the user can see and execute within the cleverQ user interface.

Topics in this section:

- [Create user](#)
- [Show overview of users](#)
- [User general settings](#)
- [Assign sites to a user](#)
- [Edit own user profile](#)
- [Show login activity](#)

## 8.1 Create user

You can create as many users as you want. To create a new user:

> Click the "Plus" symbol in the header bar, and then select **User** in the menu that appears.

→ The **New user** window appears, where you can immediately enter the main parameters of the user.

---

### User name

The user must log in to cleverQ under this user name, and the user appears in cleverQ under this name.

The user name may contain spaces, umlauts and special characters.

Upper case characters are automatically converted to lower case characters.

---

### Email

In some cases, cleverQ users receive notifications via email. For example, this may happen when a customer has booked an appointment that must be explicitly confirmed by an employee.

cleverQ sends these emails to the email address specified here.

*Note: The email address must be unique and may only be assigned once. For example, it is therefore not possible to assign the email address `info@your-organization.org` to several users.*

If necessary, users can change the email address themselves in their user profile.

---

### Role

Role of the user according to the roles predefined in cleverQ. The role determines which user rights the user has in cleverQ, i.e. which functions the user can therefore see and execute.

- *Super admin:*  
Special user role for cleverQ staff. Has special user rights to manage the individual tenants of cleverQ, that is the organizations (authorities, companies) that use cleverQ. Plus some additional rights at system level.
- *Admin:*  
Special user role for cleverQ distribution partners. Like the *Super admin* role, has the right to manage multiple tenants.

- **Tenant admin:**  
Top user role within an organization that uses cleverQ. Has all the user rights required within this organization. If the organization has multiple sites, this also includes managing all of these sites.
- **Tenant admin API:**  
This user role is only relevant in case you use the cleverQ API. A user of this role can see the internal IDs of desks, services, etc. Also, this user can see the ticket IDs in the ticket list on a desk. The IDs are otherwise visible only to users of the role *Super-Admin*. In addition, the *Tenant admin API* has the rights to view and edit all customer information. All other rights are the same as for a *Tenant admin*.
- **Site admin:**  
Has all user rights to configure and manage a specific individual site within an organization. Does not have access to other sites and cannot create additional sites.  
  
When you create a new user, this user is automatically assigned the currently selected site (visible in the header bar of the administration interface). If necessary, you can change this later or assign additional sites to the user (see [Assign sites to a user](#)).
- **Appointment Admin**  
Can access only to those functions that are needed to provide and manage appointments: Dashboard, opening hours, schedule templates, and appointment slots. In addition, users of this role have access to the desks of the sites assigned to them in each case.
- **User:**  
Simple user. Only has access to the fully configured desks to which the user is assigned. Does not see the administration interface and cannot change the configuration of cleverQ.

**Important:** Each user can only create users that have the same user rights as himself or herself. Each user can only assign those user rights to other users that he has himself or herself. If you need user access with additional user rights, contact your system administrator.

*Note: Additional user rights result from the desks that a user is assigned to (menu item **Desks > Users**) and how these desks are configured. Among other things, this determines whether a user can view the statistics and what data can be seen in these statistics.*

---

## Language

Language in which the user interface of cleverQ is displayed to the user and in which the user receives any system messages.

*Note: If required, users can change the language themselves at any time in their user profile.*

---

### Password

Password for user login in cleverQ.

The password must consist of at least 8 characters. Spaces and special characters are allowed.

**Important:** Use a different password for each user without following any specific scheme. For maximum security, use a combination of randomly selected lowercase and uppercase letters, numbers, and special characters.

---

### Password confirmation

Repetition of the password to prevent any typos.

## 8.2 Show overview of users

You can see all users of the site who do not have any user roles with more rights than your own user role in the user overview.

### Call

> In the menu, select **Users > Index**.

→ A tabular listing of users appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new user directly</b>	<p>&gt; Click the <b>New user</b> button above the table.</p> <p>→ The window for creating a new user appears directly.</p>
<b>Filter table</b>	<p>&gt; Enter the characters that must appear in the remaining entries into the input field above the table.</p> <p>For example, if you are looking for a specific user, enter part of that user's name.</p>
<b>Sort table by columns</b>	<p>&gt; Click the relevant column header.</p>
<b>Edit user</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the relevant user appears directly.</p>
<b>Delete user</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p>

## 8.3 User general settings

The general user settings include their basic data, such as user name, password, and user rights.

### Call

> In the menu, select **Users > General**.

→ A page with a user's basic data appears.

### Selected user

Here you can see and select the user to be edited. The settings made and the data displayed apply only to this user.

### User settings

Parameter	Meaning
Role	<p>Role of the user according to the roles predefined in cleverQ. The role determines which user rights the user has in cleverQ, i.e. which functions the user can therefore see and execute.</p> <ul style="list-style-type: none"><li>▪ <i>Super admin:</i> Special user role for cleverQ staff. Has special user rights to manage the individual tenants of cleverQ, that is the organizations (authorities, companies) that use cleverQ. Plus some additional rights at system level.</li><li>▪ <i>Admin:</i> Special user role for cleverQ distribution partners. Like the <i>Super admin</i> role, has the right to manage multiple tenants.</li><li>▪ <i>Tenant admin:</i> Top user role within an organization that uses cleverQ. Has all the user rights required within this organization. If the organization has multiple sites, this also includes managing all of these sites.</li></ul>

Parameter	Meaning
	<ul style="list-style-type: none"> <li data-bbox="555 322 1348 622"> <p>▪ <i>Tenant admin API:</i> This user role is only relevant in case you use the cleverQ API. A user of this role can see the internal IDs of desks, services, etc. Also, this user can see the ticket IDs in the ticket list on a desk. The IDs are otherwise visible only to users of the role <i>Super-Admin</i>. In addition, the <i>Tenant admin API</i> has the rights to view and edit all customer information. All other rights are the same as for a <i>Tenant admin</i>.</p> </li> <li data-bbox="555 651 1348 969"> <p>▪ <i>Site admin:</i> Has all user rights to configure and manage a specific individual site within an organization. Does not have access to other sites and cannot create additional sites.</p> <p>When you create a new user, this user is automatically assigned the currently selected site (visible in the header bar of the administration interface). If necessary, you can change this later or assign additional sites to the user (see <a href="#">Assign sites to a user</a>).</p> </li> <li data-bbox="555 999 1348 1218"> <p>▪ <i>Appointment Admin</i> Can access only to those functions that are needed to provide and manage appointments: Dashboard, opening hours, schedule templates, and appointment slots. In addition, users of this role have access to the desks of the sites assigned to them in each case.</p> </li> <li data-bbox="555 1247 1348 1395"> <p>▪ <i>User:</i> Simple user. Only has access to the fully configured desks to which the user is assigned. Does not see the administration interface and cannot change the configuration of cleverQ.</p> </li> </ul> <div data-bbox="555 1435 1348 1664" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Important:</b> Each user can only create users that have the same user rights as himself or herself. Each user can only assign those user rights to other users that he has himself or herself. If you need user access with additional user rights, contact your system administrator.</p> </div> <p data-bbox="555 1715 1348 1863"><i>Note: Additional user rights result from the desks that a user is assigned to (menu item <b>Desks &gt; Users</b>) and how these desks are configured. Among other things, this determines whether a user can view the statistics and what data can be seen in these statistics.</i></p>

Parameter	Meaning
<b>Receives appointment confirmation emails</b>	<p><b>Requirements:</b> This option only has an effect if the following requirements are met:</p> <ul style="list-style-type: none"><li>▪ A unique and valid email address has been entered for the user in the <b>Email</b> field.</li><li>▪ At the desired desks, the respective types of emails have been selected under <b>Desks &gt; Service-dependent emails (Appointment booking, Appointment cancellation, Appointment confirmation on site)</b>.</li><li>▪ At the desired desks, the option <b>Allow managing appointments</b> has been activated under <b>Desks &gt; General permissions</b>.</li></ul> <p>If you activate the option <b>Receives appointment confirmation emails</b>, the users will receive emails about the areas selected under <b>Desks &gt; Service-dependent emails</b>.</p>
<b>Appears in the statistics</b>	<p>Enable this option if you want the user's times to appear in the statistics.</p> <div data-bbox="555 1093 1353 1245"><p><b>Caution:</b> Adhere to the privacy regulations applicable at the respective site. In many cases, collecting and showing personal data is not permitted!</p></div> <div data-bbox="555 1301 1353 1453"><p><b>Tip for implementation:</b> If required, you can use the <b>Alias for the statistics</b> parameter to disguise the name of the user in the statistics.</p></div>
<b>May view user-specific statistics</b>	<p>If this option is enabled, the user can view statistics that contain user-specific data of other users – for example, that contain data on the average processing time of colleagues.</p> <p>Else, the user can only see their own user-specific statistics.</p> <div data-bbox="555 1727 1353 1879"><p><b>Caution:</b> Adhere to the the privacy regulations applicable at the respective site. It may not be permissible to allow third parties to view personal data.</p></div>

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 ▼ **Management group**

Parameter	Meaning
<b>Management group</b>	<p><b>Requirements:</b> Only selectable if the user is assigned the <i>Appointment Admin</i> role.</p> <p>If a management group is selected here, the user can provide schedule templates for this management group (see <a href="#">Management groups general settings</a>).</p>

---

**Additional settings**

Parameter	Meaning
<b>May view appointments of all sites</b>	If this option is enabled, the user can see all appointments of their organization, regardless of the site where these appointments will take place or have taken place.

---

**Basic data**

Parameter	Meaning
<b>User name</b>	<p>The user must log in to cleverQ under this user name, and the user appears in cleverQ under this name.</p> <p>The user name may contain spaces, umlauts and special characters.</p> <p>Upper case characters are automatically converted to lower case characters.</p>
<b>Alias for the statistics</b>	<p><b>Requirements:</b> Only has an effect if the <b>Appears in statistics</b> option is enabled.</p> <p>Here you can specify a name that differs from the user name, which cleverQ will then use instead of the actual user name in all generated statistics. This can help to anonymize statistics, for example.</p> <p>If this field remains empty, cleverQ uses the entry in the <b>User name</b> field in the statistics.</p>

Parameter	Meaning
Email	<p>In some cases, cleverQ users receive notifications via email. For example, this may happen when a customer has booked an appointment that must be explicitly confirmed by an employee.</p> <p>cleverQ sends these emails to the email address specified here.</p> <p><i>Note: The email address must be unique and may only be assigned once. For example, it is therefore not possible to assign the email address info@your-organization.org to several users.</i></p> <p>If necessary, users can change the email address themselves in their user profile.</p>
Language	<p>Language in which the user interface of cleverQ is displayed to the user and in which the user receives any system messages.</p> <p><i>Note: If required, users can change the language themselves at any time in their user profile.</i></p>
Password	<p>Password for user login in cleverQ.</p> <p>The password must consist of at least 8 characters. Spaces and special characters are allowed.</p> <div style="border: 1px solid black; padding: 5px;"><p><b>Important:</b> Use a different password for each user without following any specific scheme. For maximum security, use a combination of randomly selected lowercase and uppercase letters, numbers, and special characters.</p></div>
Password confirmation	<p>Repetition of the password to prevent any typos.</p>

## 8.4 Assign sites to a user

**Requirements:** Can only be edited if under **Selected User** a user is selected who is assigned to the *Site admin* user role.

Users who have the *Tenant admin* (or *Super admin*) user role can access all sites in an organization.

Users who have the *Site admin* user role can access only those sites that are assigned to them by default.

---

### Call

> In the menu, select **Users** > **Sites**.

→ A site assignment page appears.

---

### Selected user

Here you can see and select the user to be edited. The settings made and the data displayed apply only to this user.

---

### Assigned

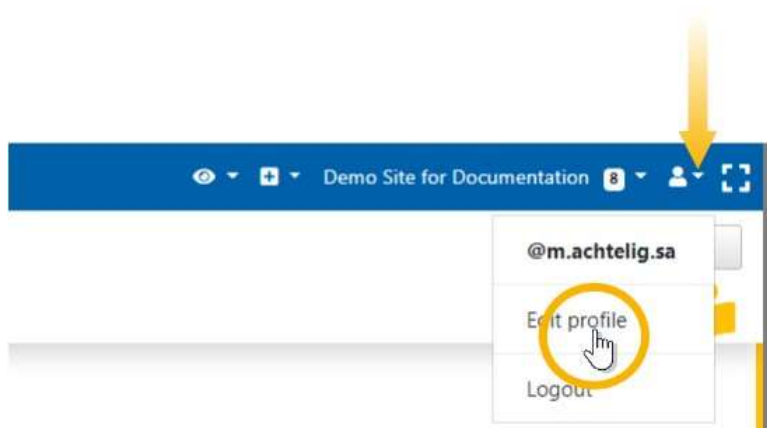
Here you enable / disable which sites and their settings the user is allowed to access.

## 8.5 Edit own user profile

There is a special program item to edit the most important settings of your own user profile.

### Call

- 1 Click the "User" symbol in the header bar.
- 2 Select **Edit profile** in the menu that appears.



### Parameters

Parameter	Meaning
<b>Email</b>	<p>In some cases, cleverQ users receive notifications via email. For example, this may happen when a customer has booked an appointment that must be explicitly confirmed by an employee.</p> <p>cleverQ sends these emails to the email address specified here.</p> <p><i>Note: The email address must be unique and may only be assigned once. For example, it is therefore not possible to assign the email address info@your-organization.org to several users.</i></p> <p>If necessary, users can change the email address themselves in their user profile.</p>
<b>Language</b>	<p>Language in which the user interface of cleverQ is displayed to the user and in which the user receives any system messages.</p> <p><i>Note: If required, users can change the language themselves at any</i></p>

<b>Parameter</b>	<b>Meaning</b>
	<i>time in their user profile.</i>

## 8.6 Show login activity

cleverQ stores the login and logout times as well as the IP addresses and user agents of each user. This enables you to track who accessed cleverQ, when and from where, if required.

*Note: cleverQ stores the login data for one year. It is not possible to switch off logging or to delete the recorded data prematurely. You have access to login data of all users that you can see yourself under **Users > Index**.*

---

### Call

> In the menu, select **Users > Login-activity**.

→ A page with an overview of a user's login data appears.

---

### Selected user

Here you can see and select the user to be edited. The settings made and the data displayed apply only to this user.

---

### Notes on the data displayed in the list

The list always shows only the login data of the user selected under **Selected user**.

The display covers a maximum period of 1 year.

You can see whether the recorded event was a *login* or a *logout* in the **Log type** column:

- cleverQ records a login whenever a user enters their login data on the login page. If a user has enabled the **Stay logged in** function and accesses a page in cleverQ directly without logging in again, cleverQ does *not* record this as a login.
- cleverQ only records a logout when a user *actively* logs out of the user interface using the **Logout** function. If a user merely closes the browser window or deletes their browser history, there is *no* entry in the list as a result.

*Note: For this reason, several login events often appear in the list one below the other, but no logout event.*

## 9 Groups

You can combine some objects within cleverQ into corresponding groups.

- You can use *services groups* to group several services together. On the web appointments page (but not in the cleverQ App), the individual services then appear grouped according to these services groups.

If *inMode* is disabled on desks (**Use inMode desk design** parameter under **Desks > Visual settings**), the services groups also appear there on the ticket creation page.

- You can use *request groups* to group multiple requests at a time. On the web appointments page and in the cleverQ App, the individual requests then appear grouped by these request groups.
- You can use *desk groups* to group multiple desks together. Desk groups are used in particular to display alarms on the right desks and thus to the right persons.

Topics in this section:

- [Services groups](#)
  - [Show overview of services groups](#)
  - [Services group general settings](#)
  - [Assign services to a services group](#)
- [Request groups](#)
  - [Show overview of request groups](#)
  - [Request group general settings](#)
  - [Assign requests to a request group](#)
- [Management groups](#)
  - [Create Management groups](#)
  - [Show overview of management groups](#)
  - [Management groups general](#)
  - [Assign services to a management group](#)

## 9.1 Services groups

Optionally, you can combine several services into services groups. On the web appointments page (but not in the cleverQ App), the individual services then appear grouped according to these services groups.

**Tip for implementation:** If your organization offers a very large number of services, breaking them down into services groups can help your customers quickly find the service that applies to them in a targeted manner.

**Caution:** Once one or more services groups exist, only those services assigned to one of these services groups appears for customers to choose from. Therefore, make sure that each service is actually assigned to a services group in the end (see [Assign services to a services group](#)).

Topics in this section:

- [Show overview of services groups](#)
- [Services group general settings](#)
- [Assign services to a services group](#)

## 9.1.1 Show overview of services groups

In the services groups overview, you can see all the services groups defined for the site and their most important settings.

In particular, you can also see here which services are assigned to a services group in each case.

### Call

> In the menu, select **Groups > Services groups > Index**.

→ A tabular listing of the services groups appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Edit services group</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the relevant services group directly appears.</p>
<b>Change display order</b>	<p>In the current version of the software, the order in which the services groups are displayed on the desks and on the web appointments page is based on the ID of the services group.</p> <p>If you want to change the order, you need to delete the services groups, create them again, and then reassign the respective services to the services groups.</p>
<b>Delete services group</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: Deleting the services group does not delete the individual services that it contains. However, initially these services will no longer appear when drawing tickets and booking appointments, as these services are now no longer assigned to a services group. These services will not appear again until you have either assigned the services to another services group, or until you have deleted all other services groups as well. (If there are no more services groups, all services are immediately available for customers to select directly.)</i></p>

## 9.1.2 Services group general settings

The general settings of a services group determine how the system processes this services group.

### Call

> In the menu, select **Groups > Services groups > General**.

→ A page with the general data of a services group appears.

### Selected services group

Here you can see and select the services group to be edited. The settings made are valid only for this services group.

### Settings

Parameter	Bedeutung
<b>Active</b>	<p>The services group's services are only available if this option is enabled. Thus they are also displayed on the web appointments page.</p> <div style="border: 1px solid #0070c0; padding: 10px;"> <p><b>Tip for implementation:</b> If you set up new services while the system is running, you can disable this option until the configuration is complete. This will help you avoid potential error messages and appointment bookings for services that have not yet been finally set up.</p> <p>You can also use this option to temporarily disable groups of services that are only temporarily discontinued. You will then not need to delete these services and create them again later.</p> </div>
<b>Show for information only without a popup</b>	<p>If this option is enabled, the group name is just displayed as text, not as a clickable button. The information text can be entered as the name of the services group. An individual background color can be chosen for services groups which are displayed for information only under <b>Sites &gt; Web app color settings &gt; Colors for services buttons &gt; Info only background</b>.</p>

Parameter	Bedeutung
Active	<p>The services group's services are only available if this option is enabled. Thus they are also displayed on the web appointments page.</p> <p><b>Tip for implementation:</b> If you set up new services while the system is running, you can disable this option until the configuration is complete. This will help you avoid potential error messages and appointment bookings for services that have not yet been finally set up.</p> <p>You can also use this option to temporarily disable groups of services that are only temporarily discontinued. You will then not need to delete these services and create them again later.</p>
Name	<p>Name used to show the services group in the cleverQ user interface.</p> <p><b>Important:</b> The services group also appears under this name on the web appointments page.</p>
Name on web appointments page and in cleverQ App	<p>The service group appears under this name on the web appointments page as well as in the cleverQ App.</p> <p><i>Note: If you leave this field blank, cleverQ uses the name specified in the <b>Name</b> field on the web appointments page and in the cleverQ App as well.</i></p> <p><b>Tip for implementation:</b> You can use this, for example, if the regular name is very long or too complicated for customers.</p>
Name(HTML)	<p>Name used to show the services group on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags &lt;br&gt; or &lt;p&gt; and &lt;/p&gt;.</p>

Parameter	Bedeutung
<p><b>Active</b></p>	<p>The services group's services are only available if this option is enabled. Thus they are also displayed on the web appointments page.</p> <div data-bbox="555 427 1353 797" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Tip for implementation:</b> If you set up new services while the system is running, you can disable this option until the configuration is complete. This will help you avoid potential error messages and appointment bookings for services that have not yet been finally set up.</p> <p>You can also use this option to temporarily disable groups of services that are only temporarily discontinued. You will then not need to delete these services and create them again later.</p> </div>
	<p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p> <div data-bbox="555 1055 1353 1171" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Caution:</b> The value entered in "Description in tooltip on web appointments page at service group level" overwrites this value.</p> </div>
<p><b>Description in tooltip on web appointments page at service group level</b></p>	<p><b>Requirements:</b> Displayed only if the option <b>Show tooltips for services</b> is enabled under <b>Sites &gt; Web appointments page</b>.</p> <p>Info text for customers.</p> <p>This text becomes visible when a customer clicks on the small info button that appears right next to the name of the services group on the web appointments page or in the cleverQ App.</p> <div data-bbox="555 1541 1353 1809" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Tip for implementation:</b> Here, for example, you can provide some brief information on what exactly the services group entails (help in selecting the applicable service) and, if necessary, what prerequisites must be met or what documents must be brought to an appointment. Keep the text as short and concise as possible – usually no longer than a few sentences.</p> </div> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to ex-</p>

Parameter	Bedeutung
<b>Active</b>	<p>The services group's services are only available if this option is enabled. Thus they are also displayed on the web appointments page.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> If you set up new services while the system is running, you can disable this option until the configuration is complete. This will help you avoid potential error messages and appointment bookings for services that have not yet been finally set up.</p> <p>You can also use this option to temporarily disable groups of services that are only temporarily discontinued. You will then not need to delete these services and create them again later.</p> </div>
	<p>ternal webpages and documents if needed, such as to supplement-ary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<b>General description on web appointments page</b>	<p><b>Requirements:</b> Used only if services are assigned to the services group.</p> <p>Info text for customers.</p> <p>After a customer selects a services group on the web appointments page, this text becomes visible next to the services.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplement-ary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>

Parameter	Bedeutung
<p><b>Active</b></p>	<p>The services group's services are only available if this option is enabled. Thus they are also displayed on the web appointments page.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Tip for implementation:</b> If you set up new services while the system is running, you can disable this option until the configuration is complete. This will help you avoid potential error messages and appointment bookings for services that have not yet been finally set up.</p> <p>You can also use this option to temporarily disable groups of services that are only temporarily discontinued. You will then not need to delete these services and create them again later.</p> </div>
<p><b>Avatar speech text</b></p>	<p>This is the text spoken by the avatar when this service group is selected.</p>

### Assign services to a services group

The assignment of services to a services group is *not* made when configuring the services group, but in the respective services under **Services > General**, parameter **Services group**.

### 9.1.3 Assign services to a services group

You do *not* assign services to a services group when configuring the services group, but rather for the respective services under **Services > General**, in the **Services group** parameter.

For details, see [User general settings](#).

**Caution:** As soon as one or more services groups exist, only services assigned to one of these services groups appear for customers to select. Therefore, make sure that each service is actually assigned to a services group in the end.

## 9.2 Request groups

Request groups optionally create an additional hierarchical level between services and requests. On the web appointments page and in the cleverQ App, the individual requests then appear grouped by these request groups.

**Tip for implementation:** If your organization offers a very large number of requests, breaking them down into request groups can help your customers quickly find the requests that apply to them in a targeted manner.

**Caution:** As soon as one or more request groups exist, only requests assigned to one of these request groups appear for customers to choose from. Therefore, make sure that each request is actually assigned to a request group in the end (see [Assign requests to a request group](#)).

Topics in this section:

- [Show overview of request groups](#)
- [Request group general settings](#)
- [Assign requests to a request group](#)

## 9.2.1 Show overview of request groups

In the request group overview you can see all request groups defined for the site and their most important settings.

In particular, you can see here which service the request group is assigned to, and which requests are assigned to the request group.

### Call

> In the menu, select **Groups > Request groups > Index**.

→ A tabular listing of request groups appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Edit request group</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the request group in question directly appears.</p>
<b>Change display order</b>	<p>In the current version of the software, the order in which request groups are displayed on desks, on the web appointments page, and in the cleverQ App is based on the ID of the request group.</p> <p>If you want to change the order, you need to delete the request groups, create them again, and then reassign the respective requests to the request groups.</p>
<b>Delete request group</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: Deleting the request group does not delete the individual requests that it contains. However, these requests will initially no longer appear when pulling tickets and booking appointments, as these requests are now no longer assigned to a request group. These requests will not reappear until you either assign the requests to another request group, or until you delete all other request groups as well. (If there are no more request groups, all requests are immediately available for customers to select directly.)</i></p>

## 9.2.2 Request group general settings

The general settings of a request group determine how the system processes this request group.

### Call

> In the menu, select **Groups > Request groups > General**.

→ A page with the general data of a request group appears.

### Selected request group

Here you can see and select the request group to be edited. The settings made only apply to this request group.

### Settings

Parameter	Meaning
<b>Active</b>	<p>Only if this option is enabled, cleverQ uses the request group.</p> <p>Else, you can assign requests to this request group, but the request group will not appear when booking appointments and when pulling tickets.</p> <p><b>Tip for implementation:</b> This option is particularly useful for temporarily deactivating an entire range of requests if they are to be temporarily suspended.</p>
<b>Name</b>	<p>Name used to show the request group in the cleverQ user interface.</p> <p><b>Important:</b> The request group also appears under this name on the web appointments page and in the cleverQ App.</p>
<b>Name on web appointments page and in cleverQ App</b>	<p>The request group appears under this name on the web appointments page as well as in the cleverQ App.</p>

Parameter	Meaning
	<p><i>Note: If you leave this field blank, cleverQ uses the name specified in the <b>Name</b> field also on the web appointments page and in the cleverQ App.</i></p> <div data-bbox="555 488 1353 600" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> You can use this, for example, if the regular name is very long or too complicated for customers.</p> </div>
<p><b>Name(HTML)</b></p>	<p>Name used to show the request group on the web appointments page.</p> <p>You can enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags &lt;br&gt; or &lt;p&gt; and &lt;/p&gt;.</p> <p>Example:  This text is &lt;b&gt;bold&lt;/b&gt;.&lt;br&gt;You can find additional information on our &lt;a href="https://www.your-organization.org" target="_blank"&gt;info page&lt;/a&gt;.</p> <div data-bbox="555 1171 1353 1283" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Caution:</b> The value entered in "Description in tooltip on web appointments page at service group level" overwrites this value.</p> </div>
<p><b>Description in tooltip on web appointments page at sub-task group level</b></p>	<p><b>Requirements:</b> Displayed only if the option <b>Show tooltips for requests</b> is enabled under <b>Sites &gt; Web appointments page</b>.</p> <p>Info text for customers.</p> <p>This text becomes visible when a customer clicks on the small info button that appears right next to the name of the request group on the web appointments page or in the cleverQ App.</p> <div data-bbox="555 1659 1353 1921" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Tip for implementation:</b> Here, for example, you can provide some brief information on what exactly the request group entails (help in selecting the applicable request group) and, if necessary, what prerequisites must be met or what documents must be brought to an appointment. Keep the text as short and concise as possible – usually no longer than a few sentences.</p> </div>

Parameter	Meaning
	<p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<p><b>General description on web appointments page</b></p>	<p><b>Requirements:</b> Used only if requests are assigned to the request group.</p> <p>Info text for customers.</p> <p>After a customer selects a request group on the web appointments page, this text becomes visible next to the requests.</p> <p>Optionally, you can also enter HTML code in this field and in this way format the text as you wish. You can also use this to link to external webpages and documents if needed, such as to supplementary information on your website or on third-party websites. For line breaks or paragraph breaks, you need the HTML tags <code>&lt;br&gt;</code> or <code>&lt;p&gt;</code> and <code>&lt;/p&gt;</code>.</p> <p>Example:  This text is <b>bold</b>.  You can find additional information on our <a href="https://www.your-organization.org" target="_blank">info page</a>.</p>
<p><b>Avatar speech text</b></p>	<p>This is the text spoken by the avatar when this request group is selected.</p>

### Assign requests to a request group

You make the assignment of requests to a request group under the menu item **Groups > Request groups > Requests**.

## 9.2.3 Assign requests to a request group

You can assign any number of requests to each request group.

A request can only be assigned to one request group at a time.

**Caution:** As soon as one or more request groups exist, only requests that are assigned to one of these request groups appear for customers to select. Therefore, make sure that each request is actually assigned to a request group in the end.

---

### Call

> In the menu, select **Groups > Request groups > Requests**.

→ A page that shows the requests assigned to a request group appears.

---

### Selected request group

Here you can see and select the request group to be edited. The settings made only apply to this request group.

---

### Assigned requests

Here you select which of the requests defined for the currently selected site are assigned to the request group.

**Caution:** A request can only be assigned to one request group at a time. If you assign requests to a request group that are already assigned to another request group, this automatically removes those requests from their previous request group and assigns them to the new request group without prompting.

## 9.3 Management groups

Management groups are used to upload multiple appointment templates at the same time under **Appointment Provision > Weekly Schedules**. Appointment admins and services can be assigned to a management group that has its own schedule template. At the same time, a schedule template can generally be provided for all services for the “Default” management group.

You do not assign services to a management group when configuring the management group, but rather for the respective services under **Services > General**, in the Management group parameter.

Appointment admins are assigned to a management group in **Users > General** in the Management group parameter.

Topics in this section:

- [Create Management groups](#)
- [Show overview of management groups](#)
- [Management groups general](#)
- [Assign services to a management group](#)

### 9.3.1 Create Management groups

You can create as many management groups as you like. To create a new management group:

> Select **Groups > Management groups** in the menu and click the "New management group" button.

→ The **New management group** window appears, where you can immediately enter the main parameters of the management group.

---

#### **Name**

Name used to show the management group in the cleverQ user interface.

## 9.3.2 Show overview of management groups

In the management groups overview, you can see all the management groups defined for the site and their most important settings.

In particular, you can see here which services are assigned to a management group.

### Call

> In the menu, select **Groups > Management groups > Index**.

→ A tabular listing of the management groups appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new management group directly</b>	<p>&gt; Click the <b>New management group</b> button above the table.</p> <p>→ The window for creating a new management group directly appears.</p>
<b>Edit management group</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the chosen management group directly appears.</p>
<b>Change display order</b>	<p>In the current version of the software, the order in which the management groups are displayed on the desks and on the web appointments page is based on the ID of the management group.</p> <p>If you want to change the order, you need to delete the management groups, create them again, and then reassign the respective services and employees to the management groups.</p>
<b>Delete management group</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: Deleting the management group does not delete the individual services and employees that it contains.</i></p>

### 9.3.3 Management groups general

#### Call

> In the menu, select **Groups > Management groups > General**.

→ A page with the general data of a management group appears.

#### Selected management group

Here you can see and select the management group to be edited. Only for this management group the made settings are valid.

#### Einstellungen

Parameter	Bedeutung
Name	Name used to show the management group in the cleverQ user interface.
Default schedule template	Requirements: A schedule template has to be provided for the management group under <b>Appointment provision &gt; Schedule templates</b> (see <a href="#">Create and edit schedule templates</a> ).  The appointment template selected here is used by default for the relevant management group when auto-scheduling is triggered under <b>Schedule templates &gt; Weekly schedules</b> .

#### Assign services to a management group

The assignment of services to a management group is *not* made when configuring the management group, but in the respective services under **Services > General**, parameter **Management group**.

#### Assign users to a management group

The assignment of a user with the role appointment admin to a management group is *not* made when configuring the management group, but in the respective services under **Users > General**, parameter **Management group**.

### 9.3.4 Assign services to a management group

You do *not* assign services to a management group when configuring the management group, but rather for the respective services under **Services > General**, in the **Management group** parameter.

For details, see [Service general settings](#).

## 10 Hardware

The hardware configuration controls:

- the interaction of the individual hardware components used for cleverQ at a site
- the displays and functionality on the displays of these components (if components have a display)

*Note: The cleverQ hardware in the strict sense does not include the computers on which the cleverQ desks are displayed. These computers are conventional desktop computers or even tablets with any operating system, internet access and a modern web browser. The desks are displayed in a conventional web browser. No special installation is required for this. You configure the appearance and functionality of the individual desks under the **Desks** menu item.*

**Important:** Depending on your user role, not all parameters described may be available.

Topics in this section:

- [Displays](#)
  - [Show overview of displays](#)
  - [Display general settings](#)
  - [Display Tts settings](#)
  - [Show display](#)

## 10.1 Displays

Displays are used to visualize to the customer on site:

- which customers will be called next
- when it is their own turn
- which desk (counter or room) they have to go to

There can be any number of displays at a site, such as a separate display for each floor or waiting area.

These displays can be configured either alike or differently and thus show either the same or different information.

**Important:** Depending on your user role, not all described parameters may be available.

Topics in this section:

- [Show overview of displays](#)
- [Display general settings](#)
- [Display Tts settings](#)
- [Show display](#)

## 10.1.1 Show overview of displays

In the overview of displays you can see all displays created for the site and their most important settings.

### Call

> In the menu, select **Hardware > Displays > Index**.

→ A tabular listing of the displays appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<p><b>Show display in browser (preview) and edit data fields</b></p>	<p>&gt; Click the "Eye" symbol in the <b>Actions</b> column.</p> <p><i>Tip: If you right-click the symbol, you can also open the preview in an additional browser window or on a new tab and then keep it open continuously while you edit the configuration. (Note, however, that changes here will not be visible until the page is reloaded).</i></p> <p>→ A preview of the display appears.</p>
<p><b>Edit settings of a display</b></p>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the display in question appears directly.</p>
<p><b>Generate access token</b></p>	<p>&gt; Click the "Key" symbol in the <b>Actions</b> column.</p> <p>→ A new web address (URL) appears in the table in the <b>Access token</b> column. From now on, you can call and display the display at this web address in a web browser.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Caution:</b> You can generate a new token at any time by clicking the "Key" symbol again. This will invalidate the old token and the display can no longer be called at the previous address!</p> </div>

**Delete display (remove from configuration)**

> Click the "Trash" symbol in the **Actions** column.

→ From now on, the display is no longer available and can no longer be displayed.

## 10.1.2 Display general settings

The general settings of a display include its basic settings and any scrolling text.

**Important:** Not all described parameters may be available depending on your user role.

### Call

> In the menu, select **Hardware > Displays > General**.

→ A page with the general settings of a display appears.

### Selected display

Here you can see and select the display to be edited. The settings made apply only to this display.

### General

Parameter	Meaning
<b>Show scrolling text</b>	<p>If this option is enabled, further parameters appear with which you can define a scrolling text, which then appears in a band at the bottom of the display.</p> <p><b>Tip for implementation:</b> You can use the scrolling text for important current information, for example.</p> <p><b>Important:</b> Test the scrolling text on the hardware you are using. Older or inexpensive systems may not be able to display the scrolling text sufficiently smoothly. If jolting movements occur, reduce the speed (<b>Speed</b> parameter).</p>
<b>Show slideshow</b>	<p>Activates a slideshow on the display.</p> <p>You can determine which slideshow is displayed in the <b>Playlist</b> parameter.</p>

Parameter	Meaning
	<p>The slideshow appears on the display to the right of the calls. The size of the slideshow is determined by the <b>Slideshow height</b> and <b>Slideshow width</b> parameters.</p> <p><b>Tip for implementation:</b> In a slideshow you can, for example, display advertising or important information for your customers.</p>
<b>Use tenant slideshow</b>	<p>Enables a tenant-wide slideshow on the display. Unlike a standard slideshow, this can be used across the entire tenant, not just for a single location.</p> <p>The slideshow to be displayed is determined by the <b>Tenant Playlist</b> parameter.</p> <p>The slideshow appears on the display either to the right or left of the calls. Its size is controlled by the <b>Slideshow Height</b> and <b>Slideshow Width</b> parameters.</p> <p><b>Tip for implementation:</b> A slideshow can be used to show advertisements or important information for your customers.</p>

#### ▼ Acer signage display settings

**Requirements:** Only available if the operational mode is **Acer signage**.

Note: The values can be stored either in the unit px (pixels) or as a percentage. Values in px are absolute and independent of the size of the display, while values in percent are relative and vary depending on the screen size. Accordingly, a width of 50px means that the image is 50 pixels wide, while a width of 50% means that the image takes up half of the screen width.

Parameter	Bedeutung
<b>Left position</b>	This setting defines how far the image is from the left edge of the display.
<b>Top position</b>	This setting defines how far the image is from the top edge of the display.
<b>Width</b>	This setting defines how wide the image is.

Parameter	Bedeutung
Height	This setting defines how high the image is.

▼ **Acer signage player settings**

**Requirements:** Only available if the operational mode is **Acer signage**.

Note: The values can be stored either in the unit px (pixels) or as a percentage. Values in px are absolute and independent of the size of the display, while values in percent are relative and vary depending on the screen size. Accordingly, a width of 50px means that the image is 50 pixels wide, while a width of 50% means that the image takes up half of the screen width.

Parameter	Bedeutung
Left position	This setting defines how far the image is from the left edge of the display.
Top position	This setting defines how far the image is from the top edge of the display.
Width	This setting defines how wide the image is.
Height	This setting defines how high the image is.

### 10.1.3 Display Tts settings

The text-to-speech (tts) settings for an display include the voice output settings for an display.

**Important:** Not all described parameters may be available depending on your user role.

---

#### Call

> In the menu, select **Hardware > Displays > Tts Settings**.

→ A page with the tts settings of a display appears.

---

#### Selected display

Here you can see and select the display to be edited. The settings made apply only to this display.

---

#### ▼ General

Parameter	Bedeutung
-----------	-----------

---

## 10.1.4 Show display

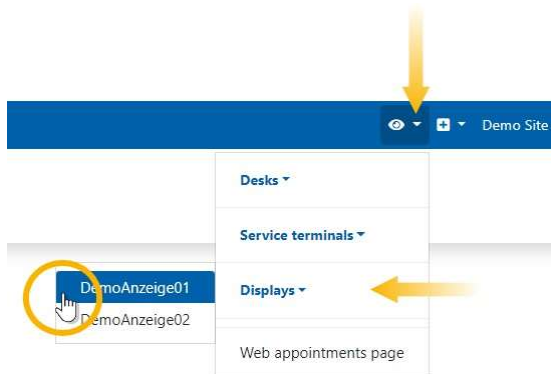
You can preview a display on a desktop computer at any time.

During operation, the display appears on some special hardware that consists of a monitor and a single-board computer. For this purpose, this computer runs in a special kiosk mode so that no window borders and other controls are visible there.

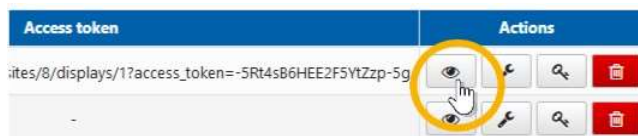
### Display preview

You can preview a display in the following ways:

- You can click the "Eye" symbol in the header bar of the administration interface, and then in the menu that appears select the display to be shown under **Displays**.



- You can click the "Eye" symbol under **Hardware > Displays > Index** in the row of the desired display in the **Actions** column.



- You can create an access token for the display under **Hardware > Display > Index**, copy this token into the address bar of a web browser, and thus open the display.

### Show display on the used monitor (kiosk mode)

The devices that you purchase from cleverQ come pre-installed with the necessary software to display the kiosk mode and to connect to cleverQ.

These devices must have been assigned once in the cleverQ configuration. If this has been done, the devices automatically connect to cleverQ after booting up and show the corresponding display in full-screen mode.

## 11 Advanced settings

The **Advanced settings** include things that are typically not relevant for every site and therefore only need to be configured in exceptional cases.

Topics in this section:

- [Surveys](#)
  - [Create survey](#)
  - [Show overview of surveys](#)
  - [Survey general settings](#)
- [Ticket priorities](#)
  - [Create ticket priority](#)
  - [Show and edit ticket priorities](#)
  - [Ticket priorities general settings](#)
- [Door access codes](#)
  - [Create door access code](#)
  - [Show door access codes overview](#)
  - [Door access code general settings](#)
- [Playlists](#)
  - [Create playlist](#)
  - [Show playlists overview](#)
  - [Playlist general settings](#)
  - [Assign slides to playlist](#)
- [Customer-Playlists](#)
  - [Create playlist](#)
  - [Show playlists overview](#)
  - [Customer-Slides general settings](#)
  - [Assign displays to playlists](#)
  - [Assign slides to a customer-playlist](#)
- [Slides](#)

- [Create slide](#)
- [Show slides overview](#)
- [Slide general settings](#)
- [Customer-Slides](#)
  - [Create customer-slide](#)
  - [Show customer-slides overview](#)
  - [Customer slide general settings](#)

## 11.1 Surveys

**Requirements:** The option **Activate surveys** must be enabled under **Sites > Settings**.

Surveys allow you to systematically ask your customers about specific topics supported by the software– for example, about their satisfaction with the service, about requests for improvement, or about anything else.

There are two types of surveys:

- **Surveys by email:**  
In this case, customers automatically receive an email with the questions after an appointment and enter the answers to these questions themselves in an online form.
- **Surveys conducted at a desk:**  
In this case, after processing a ticket, the employee verbally asks the respective customer the questions and records the answers directly at the desk.

The results of a survey can be found in the statistics (available on desks with the right to view statistics).

Topics in this section:

- [Create survey](#)
- [Show overview of surveys](#)
- [Survey general settings](#)

## 11.1.1 Create survey

You can create as many surveys as you want.

To create a new survey:

> Click the "Plus" symbol in the header bar, and then select **Advanced > Survey** in the menu that appears.

→ The **New survey** window appears.

---

### Name

The survey appears under this name in the cleverQ administration interface and in the statistics. This name is not shown to customers.

---

### Type

Select here to whom and in which form the survey questions are to be presented:

- *Survey desk*: The employee at the desk sees the survey questions on their desk after processing a ticket, asks the customer these questions verbally, and also records the answers directly on the desk before closing the ticket.
- *Survey email*: Customers receive an email after their appointment. This email includes a link to an online form, which customers use to record their responses to the survey questions themselves.

---

### Elements

This field defines the content of the survey (questions asked, answer options). This must be a so-called JSON object.

Please contact support to have the code of such a JSON object created based on the desired content of your survey. If required, support can also provide you with suitable interactive editors that you can use to generate corresponding JSON objects yourself.

## 11.1.2 Show overview of surveys

In the survey overview you can see all surveys created for the site and their most important settings.

### Call

> In the menu, select **Advanced settings** > **Surveys** > **Index**.

→ A tabular listing of the surveys appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new survey directly</b>	<p>&gt; Click the <b>New survey</b> button above the table.</p> <p>→ The window for creating a new survey directly appears.</p>
<b>Display survey (pre-view)</b>	<p>&gt; Click the "Eye" symbol in the <b>Actions</b> column.</p> <p><i>Tip: In the preview, you can test the functioning and flow even of complex, multi-page surveys without saving and evaluating the results of the answers.</i></p>
<b>Edit survey</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the respective survey directly appears.</p>
<b>Delete survey</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: If the survey is still assigned to a service, deleting the survey also deletes this assignment. However, the results of the survey remain in the statistics for evaluation.</i></p>

### 11.1.3 Survey general settings

The general settings of a survey define its properties and contents.

*Note: When and where a defined survey is actually displayed depends on the settings within the configuration of the appointment function (menu item **Sites** > **Appointment functions**), the settings of the services (menu item **Services** > **General**) as well as the settings of the desks (menu item **Desks** > **Additional settings**).*

---

#### Call

> In the menu, select **Advanced settings** > **Surveys** > **General**.

→ A page with the general settings of a survey appears.

---

#### Selected survey

Here you can see and select the survey to be edited. Only for this survey the settings made are valid.

---

#### Name

The survey appears under this name in the cleverQ administration interface and in the statistics. This name is not shown to customers.

---

#### Type

Select here to whom and in which form the survey questions are to be presented:

- *Survey desk:* The employee at the desk sees the survey questions on their desk after processing a ticket, asks the customer these questions verbally, and also records the answers directly on the desk before closing the ticket.
- *Survey email:* Customers receive an email after their appointment. This email includes a link to an online form, which customers use to record their responses to the survey questions themselves.

---

#### Elements

This field defines the content of the survey (questions asked, answer options). This must be a so-called JSON object.

Please contact support to have the code of such a JSON object created based on the desired content of your survey. If required, support can also provide you with suitable interactive editors that you can use to generate corresponding JSON objects yourself.

---

### Header for email

**Requirements:** Used only for surveys of the type *Survey email*.

Heading used in the email sent to customers for the survey.

---

### Text 1 for email

**Requirements:** Used only for surveys of the type *Survey email*.

Text of the first paragraph in the email sent to customers, printed immediately after the salutation.

**Tip for implementation:** For example, you can use a short sentence here to thank the customer for their visit and express your hope that they were happy with the service.

---

### Text 2 for email

**Requirements:** Used only for surveys of the type *Survey email*.

Second text in the email sent to customers.

**Tip for implementation:** Here you can briefly explain the purpose of the survey. For example, you can say that you would like to further improve the service in the future and optimize it according to the customers' needs. You can also ask and motivate the customer to participate in the survey while pointing out the confidential nature of the answers.

---

### Header for desk

**Requirements:** Used only for surveys of the type *Survey desk*.

Headline under which the survey appears on the desk.

---

**Text for desk**

**Requirements:** Only used for surveys of type *Survey desk*.

Freely definable additional text for a desk survey.

**Tip for implementation:** Here you can record e.g. short notes for the questioner.

## 11.2 Ticket priorities

Ticket priorities can ensure that certain tickets are called preferentially, which means that the waiting times for their holders are shorter. If a ticket has a priority and this priority is enabled for the respective service, the ticket will be queued before all tickets without priority (after all tickets already in the queue that have the same or a higher ticket priority).

In addition, the ticket with priority is highlighted on the desk.

Employees can assign a specific ticket priority to a ticket when they create or process a ticket.

Tickets pulled by customers themselves generally do not have a priority. Customers cannot assign a priority to their tickets themselves. Also, certain tickets cannot be assigned a priority automatically.

You can provide several different ticket priorities and grade them according to their importance.

### Example

You define the ticket priorities *Prio-A* (red), *Prio-B* (yellow), and *Prio-C* (green). The ticket priorities *Prio-A* and *Prio-C* are enabled for a service. There is already a ticket with *Prio-C* waiting in the service, as well as several tickets without any ticket priority.

- 1 Now an employee creates a ticket with *Prio-A*. → This ticket is then queued at the very front.
- 2 Now the employee creates a ticket with *Prio-C*. → This ticket is then queued behind the already existing ticket with *Prio-C*.
- 3 Now the employee creates a ticket with *Prio-B*. → This ticket ends up at the very back of the queue because *Prio-B* is not enabled for the service.

Topics in this section:

- [Create ticket priority](#)
- [Show and edit ticket priorities](#)
- [Ticket priorities general settings](#)

## 11.2.1 Create ticket priority

You can create as many ticket priorities as you want. Only the ticket priorities created can later be assigned to tickets by an employee.

To create a new ticket priority:

- 1 In the menu, select **Advanced settings > Ticket priorities > Index**.  
→ A list of all existing ticket priorities appears.
- 2 Click the **New ticket priority** button above the list.  
→ The **New ticket priority** window appears.

---

### Name

Name of the ticket priority as it appears in the cleverQ user interface.

This name is visible during configuration as well as during operation for employees on the desk. Customers do not see ticket priorities and thus not the name.

*Note: On a desk, the name only appears if the option **Show name** has been enabled for a service under **Services > Ticket priority settings**.*

---

### Color

Color of the ticket priority as it appears in the cleverQ user interface.

This color is visible during configuration as well as during operation for employees on the desk. Customers do not see ticket priorities and thus not the color.

## 11.2.2 Show and edit ticket priorities

In the list of ticket priorities, you can see all ticket priorities created for the site and edit them.

### Call

> In the menu, select **Advanced settings > Ticket priorities > Index**.

→ A tabular listing of the ticket priorities appears.

### Available functions

<b>Create new ticket priority</b>	<p>&gt; Click the <b>New ticket priority</b> button above the table.</p> <p>→ The window for creating a new ticket priority directly appears (see <a href="#">Create ticket priority</a>).</p>
<b>Edit ticket priority</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the respective ticket priority directly appears (see <a href="#">Ticket priorities general settings</a>).</p>
<b>Change the order and thus the weighting</b>	<p>The order of the ticket priorities in the list determines their weighting. At runtime, tickets with ticket priorities higher in the list will be ranked before tickets that have a ticket priority lower in the list.</p> <p>To change the order:</p> <p>&gt; Click the "Up Arrow" or "Down arrow" symbols in the <b>Actions</b> column.</p>
<b>Delete ticket priority</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p>

## 11.2.3 Ticket priorities general settings

The general settings of a ticket priority define its name and color.

*Note: You can set further properties related to individual services (see [Set ticket priority settings](#)).*

---

### Call

- 1 In the menu, select **Advanced settings > Ticket Priorities > Index**.  
→ A list of all defined ticket priorities appears.
- 2 In the row of the ticket priority to be edited, click the "Wrench" symbol in the **Actions** column.  
→ The **Edit ticket priority** window appears.

---

### Name

Name of the ticket priority as it appears in the cleverQ user interface.

This name is visible during configuration as well as during operation for employees on the desk. Customers do not see ticket priorities and thus not the name.

*Note: On a desk, the name only appears if the option **Show name** has been enabled for a service under **Services > Ticket priority settings**.*

---

### Color

Color of the ticket priority as it appears in the cleverQ user interface.

This color is visible during configuration as well as during operation for employees on the desk. Customers do not see ticket priorities and thus not the color.

## 11.3 Door access codes

If needed, you can issue persistent, that means permanently valid, door access codes for certain persons, such as employees and suppliers. With such a code in the form of a QR code, its owner can open *all* doors for which a door control has been set up.

Unlike for customers, the door opening works regardless of any appointment or other constraint.

Topics in this section:

- [Create door access code](#)
- [Show door access codes overview](#)
- [Door access code general settings](#)

### 11.3.1 Create door access code

You can create as many door access codes as you need.

**Tip for implementation:** You can either create and hand out a separate door access code to each person, or you can use the same door access code for several persons.

Creating a separate door access code for each person involves a little more administrative effort, but has the advantage that you can also delete and thus deactivate this code at any time without affecting others – for example, if an employee leaves.

**Caution:** A door access code applies to *all* doors for which a door control exists! It is not possible to distinguish who is allowed to open which door.

To create a new door access code:

- 1 Click the "Plus" symbol in the header bar, and then select **Advanced > Door access code** in the menu that appears.  
→ The **New door access code** window appears.
- 2 Enter the required parameters and confirm with **Save**.  
→ The newly created door access code is now already active.
- 3 To view the door access code and pass it on to the authorized persons, switch to the page for editing the door access code (**Advanced Settings > Door access codes > General**). Print the code there or copy it to the clipboard for forwarding.

**Caution:** To prevent possibly unauthorized persons from gaining access to the door access code, do not send the code unencrypted by email!

---

#### Name

The door access code appears Under this name in the cleverQ administration interface.

**Tip for implementation:** In order to uniquely assign the door access code, it is best to use the name of the person or group of people to whom you will be handing out the door access code.

---

**Company**

Here you can document to which company or other organizational unit the person or persons belong, to whom you are going to issue the door access code.

## 11.3.2 Show door access codes overview

In the overview of door access codes, you can see all door access codes that currently exist for the site and are therefore automatically active and valid.

### Call

> In the menu, select **Advanced settings** > **Door access codes** > **Index**.

→ A tabular listing of the door access codes appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new door access code directly</b>	<p>&gt; Click the <b>New door access code</b> button above the table.</p> <p>→ The window for creating a new door access code directly appears.</p>
<b>Edit door access code</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the respective door access code directly appears.</p>
<b>Generate new key</b>	<p>&gt; Click the "Key" symbol in the <b>Actions</b> column.</p> <p>→ A new code appears in the <b>Door access code</b> column. This code is valid immediately and replaces the previous code. This means that the previous code is now invalid and no longer opens any of the doors.</p> <div data-bbox="555 1514 1353 1706" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Important:</b> Now go to page for editing the door access code, print or copy the new code there, and hand the code to the person or persons involved so that they can continue to have access.</p> </div>
<b>Delete door access code and thus deactivate it</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p>→ This invalidates the code immediately. No more doors can be opened with the code now.</p>

### 11.3.3 Door access code general settings

The general settings for a door access code document its assignment to a specific person or group of persons as well as the code itself.

---

#### Call

> In the menu, select **Advanced settings** > **Door access codes** > **General**.

→ A page with the general settings for a door access code appears.

---

#### Selected door access code

Here you can see and select the door access code to be edited. The settings made apply only to this door access code.

---

#### Name

The door access code appears Under this name in the cleverQ administration interface.

**Tip for implementation:** In order to uniquely assign the door access code, it is best to use the name of the person or group of people to whom you will be handing out the door access code.

---

#### Unternehmen

Here you can document to which company or other organizational unit the person or persons belong, to whom you are going to issue the door access code.

---

#### Door access code

Door access code to be used in the form of a QR code.

#### Pass on code

To give the code to the authorized persons, you can alternatively:

- print the page and then cut out the code and pass it

- right-click the code, in the appearing context menu of your browser copy the image with the code to the clipboard, and finally paste the code into another program for printing or forwarding

**Caution:** To prevent unauthorized persons from being able to gain access to the code, do not send the code unencrypted by e-mail!

### Change code

*Note: You cannot change the code here. To create a new code under the same assignment with the same name, use the function provided for this purpose under **Advanced settings > Door access codes > Index**.*

## 11.4 Playlists

When configuring a display, you can include a slideshow on the display under **Hardware > Displays > General**. This slideshow has a playlist assigned to it.

The playlist determines which slides are displayed in the slideshow and in which order.

Topics in this section:

- [Create playlist](#)
- [Show playlists overview](#)
- [Playlist general settings](#)
- [Assign slides to playlist](#)

## 11.4.1 Create playlist

You can create as many playlists as you like.

To create a new playlist:

> Click the "Plus" symbol in the header bar, and then select **Advanced > Playlist** in the menu that appears.

→ The **New playlist** window appears.

---

### Name

The playlist appears under this name in the cleverQ administration interface. This name does not appear on the display.

## 11.4.2 Show playlists overview

In the playlists overview you can see all the playlists created for the site.

---

### Call

> In the menu, select **Advanced settings > Playlists > Index**.

→ A tabular listing of the playlists appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

---

### Available functions

<b>Create new playlist directly</b>	<p>&gt; Click the <b>New playlist</b> button above the table.</p> <p>→ The window for creating a new playlist directly appears.</p>
<b>Edit playlist</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the playlist in question directly appears.</p>
<b>Delete playlist</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: If the playlist is still assigned to a display, this assignment is also deleted when the playlist is deleted. No slideshow will then be shown on the display, even if this option is still activated.</i></p>

### 11.4.3 Playlist general settings

The general settings of a playlist define its name. You can also see a preview here.

*Note: When and where a defined playlist is actually displayed in a slideshow depends on the settings within the configuration of the displays made under **Hardware > Displays > General**.*

---

#### Call

> In the menu, select **Advanced settings > Playlists > General**.

→ A page with the general settings of a playlist appears.

---

#### Selected playlist

Here you can see and select the playlist you want to edit. The made settings apply only for this playlist.

---

#### Enable progress bar

Determines whether a growing colored bar appears at the bottom of the slideshow to visualize the progress.

*Note: You can set the color of the progress bar for each display under **Hardware > Displays > General**.*

---

#### Name

The playlist appears under this name in the cleverQ administration interface. This name does not appear on the display.

---

#### Preview

Here you can see a preview of a slideshow as it appears when the slideshow uses the edited playlist.

The preview also takes into account the display durations set for the individual slides in their settings. The green bar below the preview increases proportionally every second. This bar will *not* appear on the display later.

The size of the displayed slides does *not* correspond to the later size on the display. You define the final dimensions of the slideshow in the settings of the respective display. (This way it is possible to display the same slideshow in different sizes on different displays.)

## 11.4.4 Assign slides to playlist

You can assign any number of slides to a playlist. At runtime, cleverQ displays these slides on a display on which a slideshow with the playlist is activated.

The order of the slides in the playlist determines the order of the display.

*Note: The duration of how long a particular slide is displayed in a slideshow is not a playlist setting, but an individual setting for each slide.*

### Call

> In the menu, select **Advanced settings > Playlists > Slides**.

→ A tabular listing of the slides contained in a playlist appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Selected playlist

Here you can see and select the playlist you want to edit. The made settings apply only for this playlist.

### Available functions

<b>Add slide to playlist</b> <b>Remove slide from playlist</b>	Such an assignment is not possible on this page. All slides defined for the edited site always appear in the list. However, you can apply a slide within the playlist or not.
<b>Apply slide</b> <b>Do not apply slide</b>	Enable or disable the switch in the <b>Applied</b> column.
<b>Change slide order</b>	<div style="border: 1px solid #ccc; padding: 10px;"> <p><b>Caution:</b> If you have multiple playlists, changing the order affects all playlists alike. The order of the slides is always the same in all playlists. The playlists differ only in which slides are applied and which slides are not.</p> </div> <p>To change the order, click the arrows in the <b>Actions</b> column.</p>

**Important:** Note that for a slide the arrows appear only if the slide is applied in the playlist and if the setting has already been saved after applying the slide.

## 11.5 Customer-Playlists

When configuring a display, you can include a customer-slideshow on the display under **Hardware > Displays > General**. This customer-slideshow has a customer-playlist assigned to it.

The customer-playlist determines which slides are displayed in the customer-slideshow and in which order.

Topics in this section:

- [Create playlist](#)
- [Show playlists overview](#)
- [Customer-Slides general settings](#)
- [Assign displays to playlists](#)
- [Assign slides to a customer-playlist](#)

## 11.5.1 Create playlist

You can create as many playlists as you like.

To create a new playlist:

> Click the "Plus" symbol in the header bar, and then select **Advanced > Customer-Playlist** in the menu that appears.

→ The **New customer-playlist** window appears.

---

### Name

The playlist appears under this name in the cleverQ administration interface. This name does not appear on the display.

## 11.5.2 Show playlists overview

In the playlists overview you can see all the customer-playlists created for the site.

### Call

> In the menu, select **Advanced settings > Customer-Playlists > Index**.

→ A tabular listing of the customer-playlists

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create new customer-playlist directly</b>	<p>&gt; Click the <b>New customer-playlist</b> button above the table.</p> <p>→ The window for creating a new customer-playlist directly appears.</p>
<b>Edit customer-playlist</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the customer-playlist in question directly appears.</p>
<b>Delete customer-playlist</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: If the customer-playlist is still assigned to a display, this assignment is also deleted when the customer-playlist is deleted. No slideshow will then be shown on the display, even if this option is still activated</i></p>

### 11.5.3 Customer-Slides general settings

The general settings of a customer-playlist define its name. You can also see a preview here.

*Note: When and where a defined customer-playlist is actually displayed in a slideshow depends on the settings within the configuration of the displays made under **Hardware > Displays > General**.*

---

#### Call

> In the menu, select **Advanced settings > Customer-Playlists > General**.

→ A page with the general settings of a customer-playlist appears.

---

#### Selected playlist

Here you can see and select the playlist you want to edit. The made settings apply only for this playlist.

---

#### Enable progress bar

Determines whether a growing colored bar appears at the bottom of the slideshow to visualize the progress.

*Note: You can set the color of the progress bar for each display under **Hardware > Displays > General**.*

---

#### Name

The playlist appears under this name in the cleverQ administration interface. This name does not appear on the display.

---

#### Preview

Here you can see a preview of a slideshow as it appears when the slideshow uses the edited playlist.

The preview also takes into account the display durations set for the individual slides in their settings. The green bar below the preview increases proportionally every second. This bar will *not* appear on the display later.

The size of the displayed slides does *not* correspond to the later size on the display. You define the final dimensions of the slideshow in the settings of the respective display. (This way it is possible to display the same slideshow in different sizes on different displays.)

## 11.5.4 Assign displays to playlists

The display settings of a tenant playlist define which displays the selected tenant playlist is shown on. All displays belonging to the tenant are shown.

*Note: Whether and where a defined tenant playlist is actually shown in a slideshow depends on which displays are selected here.*

---

### Call

- > Select **Advanced Settings > Tenant Playlists > General** from the menu.
- A page with the general settings of a tenant playlist appears.

---

### Selected playlist

Here you can see and select the playlist you want to edit. The made settings apply only for this playlist.

---

### ▼ Displays

Here, you can select the displays on which the chosen tenant playlist should be shown.

*Note: All displays belonging to the tenant are shown here.*

---

## 11.5.5 Assign slides to a customer-playlist

You can assign any number of slides to a customer playlist. At runtime, cleverQ displays these slides on a display where a slideshow with the customer playlist is enabled.

The order of the slides in the customer playlist determines the display sequence.

*Note: The length of time a particular slide is shown in a slideshow is not a setting of the customer playlist, but an individual setting for each slide.*

---

### ▼ Call

> Select **Advanced Settings > Tenant Playlists > Slides** from the menu.

→ A tabular list of the slides contained in a tenant playlist appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

---

### Selected playlist

Here you can see and select the playlist you want to edit. The made settings apply only for this playlist.

---

### Available functions

<b>Add a slide to the customer playlist</b> <b>Remove a slide from the customer playlist</b>	Such an assignment is not possible on this page. All slides defined for the edited location are always shown in the list. However, you can choose whether or not to use a slide within the customer playlist.
<b>Apply slide</b> <b>Do not apply slide</b>	Enable or disable the toggle in the <b>Applied</b> column.

**Change the order of slides**

**Caution:** If you have multiple customer playlists, changing the order affects all customer playlists equally. The order of slides is always the same in all customer playlists. Customer playlists differ only in which slides are applied and which are not.

To change the order, click the arrows in the **Actions** column.

**Important:** Note that the arrows for a slide are only shown if the slide is applied in the customer playlist and the setting has already been saved after applying it.

## 11.6 Slides

Slides are the individual pages that can be included in a playlist and thus ultimately appear in a slideshow.

Each slide consists of an image that determines the content to be displayed. Any text must also be part of this image.

Each slide is also assigned the display duration within the slideshow.

Topics in this section:

- [Create slide](#)
- [Show slides overview](#)
- [Slide general settings](#)

## 11.6.1 Create slide

You can create as many slides as you need and use them later in one or in different playlists. You may also use the same slide in several playlists in parallel.

To create a new slide:

> Click the "Plus" symbol in the header bar, and then select **Advanced > Slide** in the menu that appears.

→ The **New slide** window appears.

---

### Name

The slide appears under this name in the cleverQ administration interface. This name does not appear on the display.

## 11.6.2 Show slides overview

In the overview of slides you can see all slides created for the site, regardless of whether and in which playlists these slides are used.

---

### Call

> In the menu, select **Advanced settings** > **Slides** > **Index**.

→ A tabular listing of the slides appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

---

### Available functions

<b>Create new slide directly</b>	<p>&gt; Click the <b>New slide</b> button above the table.</p> <p>→ The window for creating a new slide directly appears.</p>
<b>Edit slide</b>	<p>&gt; Click the "Wrench" symbol in the <b>Actions</b> column.</p> <p>→ The page for editing the general settings of the relevant slide directly appears.</p>
<b>Delete slide</b>	<p>&gt; Click the "Trash" symbol in the <b>Actions</b> column.</p> <p><i>Note: If the slide is still used in one or more playlists, deleting the slide will automatically remove it from these playlists.</i></p>

### 11.6.3 Slide general settings

The general settings of a slide define its name and content as well as the display duration of the slide.

The content to be displayed is determined by an image. If you want to display texts, the texts must also be part of this image.

*Note: For the slide to actually be displayed, you still need to add the slide to a playlist later, assign the playlist to a display in turn, and enable the "Show slideshow" option for the display.*

---

#### Call

> In the menu, select **Advanced settings** > **Slides** > **General**.

→ A page with the general settings of a slide appears.

---

#### Ausgewählte Folie

Here you can see and select the slide to be edited. The settings made apply only to this slide.

---

#### Name

The slide appears under this name in the cleverQ administration interface. This name does not appear on the display.

---

#### Display duration (seconds)

Determines the time in seconds how long the slide remains visible within a slideshow.

**Tip for implementation:** Not all slides need to have the same display duration. Choose the display duration long enough to avoid adding too much clutter to the display and to give customers enough time to fully read and view the slide content.

---

#### Image

Image with the content to be displayed on the slide. If you also want to display texts, these texts must be contained in the image.

The size is basically arbitrary, but should be based on the maximum size of later use. You determine the size at which a slideshow is displayed in the settings for a display under **Hardware > Display > General**. This way it is possible to display the same slideshow on different displays in different sizes.

Supported image formats are SVG, JPG, PNG and GIF.

**Tip for implementation:** The GIF format can also be used to create simple animated images (animated GIF).

## 11.7 Customer-Slides

Slides are the individual pages that can be included in a playlist and ultimately appear in a slideshow.

Each slide consists of an image that defines the content to be displayed. Any text must also be part of this image.

Each slide is also assigned a duration that determines how long it will later be shown within the slideshow.

Topics in this section:

- [Create customer-slide](#)
- [Show customer-slides overview](#)
- [Customer slide general settings](#)

## 11.7.1 Create customer-slide

You can create any number of tenant slides and later use them in one or more different tenant playlists. You can also use the same tenant slide in multiple tenant playlists at the same time.

To create a new customer slide:

> Click the **plus** icon in the header bar, then select **Advanced > Customer Slide** from the menu that appears.

→ The **New Tenant Slide** window appears.

---

### Name

The slide appears under this name in the cleverQ administration interface. This name does not appear on the display.

## 11.7.2 Show customer-slides overview

In the tenant slide overview, you can see all tenant slides created for the location, regardless of whether they are used and in which tenant playlists they are used.

### Call

> Select **Advanced Settings > Tenant Slides > Index** from the menu.

→ A tabular list of tenant slides appears.

*Note: To see all entries, you may need to scroll by using the buttons on the right above the table.*

### Available functions

<b>Create a new slide directly</b>	<p>&gt; Click the New Tenant Slide button above the table.</p> <p>→ The window for creating a new tenant slide appears immediately.</p>
<b>Edit slide</b>	<p>&gt; Click the wrench icon in the Actions column.</p> <p>→ The page for editing the general settings of the corresponding customer slide appears directly.</p>
<b>Delete slide</b>	<p>&gt; Click the <b>trash</b> icon in the <b>Actions</b> column.</p> <p><i>Note: If the customer slide is still being used in one or more customer playlists, deleting it will automatically remove it from those customer playlists as well.</i></p>

### 11.7.3 Customer slide general settings

The general settings of a slide define its name and content as well as the display duration of the slide.

The content to be displayed is determined by an image. If you want to display texts, the texts must also be part of this image.

*Note: For the customer-slide to actually be displayed, you still need to add the customer-slide to a customer-playlist later, assign the customer-playlist to a display in turn, and enable the "Show customer-slideshow" option for the display.*

---

#### Call

> Select **Advanced Settings > Customer Slides > General** from the menu.

→ A page with the general settings of a customer slide appears.

---

#### Ausgewählte Folie

Here you can see and select the slide to be edited. The settings made apply only to this slide.

---

#### Name

The slide appears under this name in the cleverQ administration interface. This name does not appear on the display.

---

#### Display duration (seconds)

Determines the time in seconds for which the tenant slide remains visible within a tenant slideshow.

**Tip for implementation:** Not all customer slides need to have the same display duration. Choose a display duration that is long enough to avoid making the display feel too busy and to give customers enough time to fully read and view the content of the customer slide.

---

### Image

Image containing the content to be displayed on the customer slide. If you also want to display text, that text must be included in the image.

The size is generally flexible, but it should be based on the maximum size required for later use. The size in which a customer- slideshow is displayed is defined in the settings of a display under Hardware > Displays > General. This makes it possible to show the same customer slideshow on different displays at different sizes.

Supported image formats are **SVG, JPG, PNG, and GIF**.

**Tip for implementation:** With the **GIF** format, simple animated images are also possible (**animated GIFs**)

## 12 Additional help and support

This documentation provides you with comprehensive help for the standard configuration of cleverQ and for standard operation. Normally, you should find all the information you need here.

---

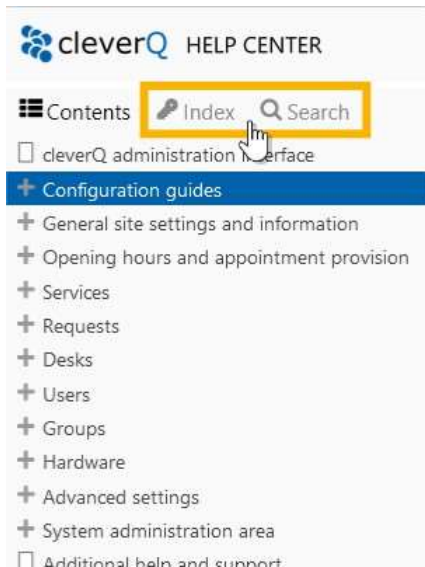
### Index and search function in the help

If necessary, also use the index and the search function in the help to quickly find the information you need.

- 1 If you have not already done so, display the Table of Contents, Index, and Search palette in help.



- 2 Click the **Index** or **Search** tab at the top of the palette.



*Tip: With the **search** you will find ALL places where a certain word occurs. Therefore, the number of search hits can become very large. With the **index** you will typically find only ONE place with the highest relevance for each keyword.*

## Support

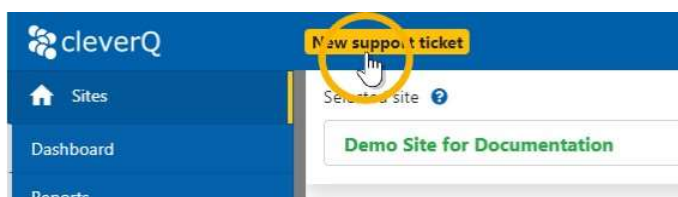
If you have any questions about special use cases that are not described in the documentation, or if you need an extension to the standard cleverQ feature set or some customization, please contact support.

You can reach the support team under:

Phone.: +49 (0)43327 25398 30

Email: [support@cleverQ.de](mailto:support@cleverQ.de)

You can also contact support directly from within the user interface. To do so, click the **New Support Ticket** button in the header bar.



---

## Help for the cleverQ desks

Operation of the cleverQ desks is largely intuitive and normally possible without further assistance, provided the users are familiar with your underlying internal organizational processes.

**Tip for implementation:** We recommend having a short training session for all affected employees as part of the introduction of cleverQ in your organization. However, the focus should not only be on the pure operation of cleverQ, but rather on your organization-specific new processes. If needed, we will be happy to support you to provide some appropriate training. Feel free to contact support or your cleverQ distribution partner.

---

## Help for the web appointments page and for the cleverQ App

Like most websites and smartphone apps, the web appointments page and the cleverQ App are so simple that no particular help function is needed here. Because your customers use the web appointments page and the cleverQ App only from time to time and not on a regular basis, they would not be willing to read any help in advance anyway.

*Note: If you experience any problems using the web appointments page or the cleverQ App, please let us know so that we can make their use even more intuitive in the future.*

---

### Help for the touchscreens

Usually, no special assistance for customers is needed on the touchscreens either.

**Tip for implementation:** If you want to add some brief explanatory keywords or sentences in individual cases, you can add them to the background image of the respective page if required.

## 13 Glossary

A	
<i>Active ticket</i>	<p>An active → ticket is currently being processed. That means that it has not yet been → closed.</p> <p>Thereby the active ticket can be:</p> <ul style="list-style-type: none"><li>▪ a → waiting ticket</li><li>▪ a → called ticket</li><li>▪ a → parked ticket</li></ul>
<i>Administration interface</i>	<p>You configure the behavior and design of cleverQ via the administration interface. The individual → desks as well as the → web appointments page and the cleverQ App are not part of the administration interface.</p> <p>Only those users who have administration rights can access the administration interface when logging in. Other users are taken directly to a desk after logging in.</p> <p>From the administration interface, each desk can be opened, as well as a preview of each → display and of each → touch-screen.</p> <p>In addition to the regular administration interface, there is an additional → system administration area for users who have some special user rights.</p>
<i>Appointment</i>	<p>An appointment in cleverQ is the time designated for processing one or more requests of a particular service.</p> <p>Appointments can be booked either by employees (web appointments page accessible from the desk) or by customers themselves (web appointments page or cleverQ App).</p> <p>cleverQ can be configured in such a way that booked appointments must be explicitly confirmed by an employee or not.</p> <p>cleverQ can also be configured so that customers can only book appointments after being invited to do so by an employee.</p>

	<p>Customers with an appointment must confirm their presence once they arrive on site, either with an employee or by typing or scanning their reservation code. This turns the reserved appointment into a ticket that is added to the queue of other → scheduled customers and → of walk-in customers with the corresponding priority at the time of the appointment. (Either the customer receives a ticket with a new ticket number or the customer is called via the reservation number from their appointment confirmation).</p>
<i>Appointment provisioning</i>	<p>In order for employees or customers to be able to book appointments for a specific time and service, corresponding → appointment slots must have been made available for this.</p> <p>Appointment slots are always made available on a weekly basis in the form of weekly schedules. The → schedule templates used determine at which times on which days of the week appointments can be booked, and they determine the maximum number of appointments that can be booked.</p> <p>If no appointment slots have been provided or if no more provided appointment slots are available, no appointments can be booked for the period in question.</p>
<i>Appointment slot</i>	<p>An appointment slot is the smallest time unit that can be used for a service or for a request. Example: Customer requests are to be scheduled in blocks of 5 minutes each. In this case, an appointment slot lasts 5 minutes. If an appointment takes 15 minutes, for example, the appointment requires 3 appointment slots.</p>
<b>C</b>	
<i>Called ticket</i>	<p>A ticket that has been called is currently being processed by an employee. It has neither been → parked nor already been → closed.</p>
<i>cleverQ App</i> <i>cleverQ Web App</i>	<p>With the help of the cleverQ App, → customers can pull → e-tickets and book → appointments.</p> <p>In addition, customers receive push notifications before and when their e-tickets are called. So customers do not have to stay in a specific waiting area permanently while waiting. Also, a → QR code displayed in the cleverQ App can be used for confirmations and access control.</p>

	<p>Customers can download the cleverQ App for the Android and iOS operating systems free of charge from the respective app stores.</p> <p>In addition, there is also an installation-free web app. With this app, customers can pull an e-ticket for a specific service on site by scanning a QR code posted or displayed on a touchscreen.</p>
<i>Close a ticket</i>	<p>Once all of a customer's requests have been successfully processed, the executing employee either closes the ticket manually (depending on the cleverQ configuration), or cleverQ closes the ticket automatically when the next ticket is called.</p> <p>By closing, the ticket disappears from the queue and cannot be called again.</p>
CSS	<p>CSS stands for "Cascading Style Sheet".</p> <p>Formatting language used for content displayed in web browsers.</p>
<i>Customer</i>	<p>A customer in the sense of cleverQ is an individual person who uses cleverQ to book an appointment or to obtain a ticket for himself or herself. This can be, for example, a person who wants to visit a company or a public office and therefore needs an appointment or a ticket.</p> <p>There can be → scheduled customers and → walk-in customers.</p> <p>A customer is not to be confused with a → user. Customers are the actual end users of cleverQ, while users run cleverQ for their customers.</p> <p>A customer normally only sees a → touchscreen for requesting tickets, the → display in the waiting area, and possibly the → web appointments page or the → cleverQ App. A user sees the → administration interface (rights-dependent), one or more → desks, and, if needed, the web appointments page.</p>
<i>Customer information</i>	<p>Customer information is data that cleverQ requests from customers when booking an appointment or also when pulling a ticket via the cleverQ App. Which data this is, is</p>

	freely configurable and – with the exception of the email address – has no influence on the functionality of cleverQ.
<b>D</b>	
<i>Desk</i>	<p>Desks are the pages in cleverQ where employees call, edit, and manage tickets. Statistics can also be accessed from the desks.</p> <p>The rights and functions of each desk can be defined individually. Because it is individually defined for each → user which desks they can use, the rights of a desk also determine which functions and data the user can access.</p> <p>Users who do not have access to the → cleverQ administration interface (users without administration rights) are taken directly to one of the desks accessible to them after logging in. Users with administration rights can access the individual desks from the administration interface.</p>
<i>Desk group</i>	<p>Optionally, → desks can be assigned to one or more desk groups.</p> <p>Desk groups are used in particular to route → silent group alarms and → site alarms to the right desks and thus to the right persons.</p>
<i>Display</i>	<p>A display in the waiting area shows information about the waiting and called customers.</p> <p>Normally, these displays hang in the waiting area of one or more services and also show the called customers to which desk (counter or room) they have to go. However, it is also possible to use a display directly as a door sign or as a display above a single desk (counter or room). In such a case, the display shows only the calls for this single desk. The calls of other desks and the counter or room numbers do not appear here.</p> <p>Technically, the display is a webpage shown in a web browser. However, since this display runs as a → kiosk in full-screen mode, this fact is not apparent to customers.</p>
<b>E</b>	

<i>E-ticket</i>	<p>An e-ticket is an electronic ticket, that is an electronic waiting tag.</p> <p>Customers can pull e-tickets using the → cleverQ App.</p> <p>Similar to tickets printed on paper, e-tickets have a unique → ticket number and optionally also a → QR code.</p>
<i>Exception day</i>	<p>On exception days, different rules apply to opening hours and to the → appointment provision from the standard weekdays and public holidays.</p> <p>An exception can mean both that, deviating from the normal case, it is open on a certain day or that, deviating from the normal case, it is <i>not</i> open.</p> <p>Exception days always apply to one specific site only.</p>
<b>G</b>	
<i>Gateway</i>	<p>So-called gateways are used to connect older, already existing call systems or their components to cleverQ.</p>
<b>H</b>	
<i>Header</i>	<p>In the → administration interface, the header bar is located at the top of the window. There you can call various functions. The header bar thus supplements the → menu.</p>
<i>HTML</i>	<p>HTML stands for "Hypertext Markup Language".</p> <p>Text-based markup language for electronic documents.</p>
<b>K</b>	
<i>Kiosk</i>	<p>A so-called "kiosk" is a special display mode in which only the content of a specific program window is visible and operable in full-screen mode. In the case of cleverQ, this is needed for the → displays as well as for the → touchscreens.</p> <p>No frames and no controls of the program window are visible on the kiosk. Therefore, customers cannot exit, close or resize the window.</p>
<b>L</b>	

<i>Landing page</i>	<p>In cleverQ, a landing page is a special webpage with an overview of all the sites of an organization – usually displayed on a map. If customers click a site on the landing page, this takes them to the web appointments page for this site.</p> <p><i>Note: Landing pages are not a standard feature of cleverQ, but need to be created as a separate service.</i></p>
<b>M</b>	
<i>Menu</i>	<p>In the → administration interface, the menu is located on the left side of the window. With the menu you open the configuration pages of the various settings and modules.</p> <p><i>Note: You can also access some functions via the → header bar.</i></p>
<b>O</b>	
<i>Organization</i>	<p>cleverQ is used equally by government agencies, companies, as well as other institutions.</p> <p>We generally use the term "organization" as a generic form for this. By "your organization" we therefore generally mean your agency, your company or your other institution.</p>
<b>P</b>	
<i>Pager</i>	<p>A pager is a small mobile message receiver. Together with cleverQ, pagers can be used to inform customers when their tickets are being called. For this purpose, customers receive a corresponding pager on loan together with their ticket and can then move freely on site instead of having to sit in a specific waiting area.</p> <p>For employees, pagers can be used to call the employee responsible for a particular desk if there are tickets waiting in the queue for this desk.</p>
<i>Park a ticket</i>	<p>If this has been provided for in the configuration of cleverQ, employees can pause the processing of a ticket that has already been called ("park" the ticket). In the meantime, one</p>

	or more other tickets can be called and processed. The parked ticket can then be called again at any time.
<i>Parked ticket</i>	<p>A parked ticket has already been called, but then its processing was paused. In the meantime, one or more other tickets can be called and processed. Subsequently, the parked ticket can be called again at any time.</p> <p>Parked tickets are not to be confused with → waiting tickets.</p>
<b>Q</b>	
<i>QR code</i>	<p>QR code stands for "Quick Response Code".</p> <p>Code readable with a scanner or cell phone, consisting of a two-dimensional dot matrix.</p>
<b>R</b>	
<i>Report</i>	<p>Reports are files with data on past events and tickets.</p> <p>cleverQ generates reports as files in CSV format. You can download these files to your computer if required and open and evaluate them with the help of a spreadsheet program.</p>
<i>Request</i>	<p>Requests are the specific actions that → customers ask for from an → organization. They are relevant both for the allocation of appointments and for → tickets and → e-tickets.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>▪ In a government agency: <i>apply for an ID card, report a change of residence, issue a marriage or birth certificate.</i></li> <li>▪ At a bank: <i>open an account, purchase fixed-income securities, buy stocks, apply for a real estate loan</i></li> </ul> <p>Each request is assigned to one or more → services that provide it. Example: The service <i>Citizens' Office</i> handles the requests of <i>applying for an ID card</i> and <i>reporting a change of residence</i>. The service <i>Registry Office</i> handles the requests of <i>marriage</i> and <i>issuing a birth certificate</i>.</p>
<i>Request a ticket</i>	cleverQ creates tickets exclusively on demand. Customers can either pull → tickets themselves in cleverQ (for example at a service terminal with a printer or as an e-ticket in the

	<p>cleverQ App), or an employee can pull a ticket for a customer (for example at an information counter).</p> <p>When the ticket is pulled, cleverQ assigns a unique → ticket number that is used later to call the ticket.</p> <p>cleverQ prints out classic tickets on a connected ticket printer. E-tickets appear on the screen in the cleverQ App.</p>
<i>Request group</i>	<p>Optionally, several → requests can be combined into request groups.</p> <p>If needed, request groups can create an additional hierarchical layer between services and requests. On the web appointments page and in the cleverQ App, the individual requests then appear grouped according to these request groups.</p>
<i>Reservation code</i>	<p>For each appointment booking, customers receive a unique reservation code in the appointment confirmation. This code appears either as a pure letter and number code or additionally also as a → QR code.</p> <p>Customers use the reservation code to confirm their presence and their entitlement to the appointment when they arrive on site. In the process, customers or an employee either enter the code manually or scan the QR code.</p> <p>In addition, unless a new ticket has been assigned during on-site registration, the reservation code appears like a ticket number on the display in the waiting area when it is the customer's turn.</p>
<b>S</b>	
<i>Scheduled customer</i>	<p>A so-called scheduled customer is a customer who has already booked an → appointment for a specific service or for specific requests prior to their visit.</p> <p>The opposite of a scheduled customer is a → walk-in customer.</p>
<i>Schedule template</i>	<p>Schedule templates are used for the weekly planning. There, the schedule template used for a particular week determines at which times on which days of the week appointments will</p>

	<p>be bookable, and it determines the maximum number of appointments that can be booked in each case.</p> <p>There can be any number of schedule templates. In many cases, however, there is only one schedule template for normal weeks, possibly supplemented by further individual schedule templates for special weeks with any special characteristics.</p> <p>Schedule templates always apply to a specific → site only.</p>
<i>Service</i>	<p>A service represents a specific organizational unit (such as a department) or a specific line of business within an → organization.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>▪ Government agency with the services: <i>Citizen's office, registry office, public order office, motor vehicle registration</i></li> <li>▪ Bank with the services: <i>credit counseling, investment counseling, account matters</i></li> </ul> <p>To a service, one or more → requests that the service provides for the organization's customers are assigned. Example: <i>Requesting an ID card or registering a change of residence in the service Citizen's Office.</i></p>
<i>Service terminal</i>	<p>With cleverQ, a service terminal usually consists of a → touchscreen and a → ticket printer, combined into one unit.</p>
<i>Services group</i>	<p>Optionally, several → services can be combined into services groups.</p> <p>On the web appointments page (but not in the cleverQ App), the individual services then appear grouped according to these services groups. The services groups also appear on desks when creating tickets.</p>
<i>Silent group alarm</i>	<p>Alarms serve to protect your employees and customers on site. If a customer behaves aggressively or threatening, employees can use the cleverQ SOS functions to quietly alert their colleagues.</p> <p>Alarms of the type <i>silent group alarm</i> are primarily intended for less serious cases where an employee wants to call colleagues for reinforcement as a preventive measure.</p>

	<p>If an employee triggers a silent group alarm, a message appears on all desks that belong to the same → desk group specifically defined for this alarm type.</p>
<i>Site</i>	<p>A site is the organizational unit to which the settings made in cleverQ usually apply in each case.</p> <p>Usually, each location has its own postal address.</p> <p>If an organization has several sites, you must select which site is currently being processed in the → header bar during configuration.</p>
<i>Site alarm</i>	<p>Alarms serve to protect your employees and customers on site. If a customer behaves aggressively or threatening, employees can use the cleverQ SOS functions to quietly alert their colleagues.</p> <p>Alarms of the type <i>Site alarm</i> are primarily intended for serious cases with a threat to life and limb. Example: Customer threatens with a weapon or assaults other persons.</p> <p>If an employee triggers a site alarm, a message appears on all desks that belong to the same → desk group specifically defined for this alarm type.</p>
<b>T</b>	
<i>Task</i>	<p>In cleverQ, a task refers to the initial execution or to the repetition of a → request for the same customer.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>▪ A customer wants to register 3 vehicles at a registration office. In this case, the customer has the request "vehicle registration" with 3 tasks.</li> <li>▪ A customer wants to apply for an ID card for himself and for his child. In this case, the customer has the request "application for ID card" with 2 tasks.</li> </ul> <p>Tasks only exist for requests, not for → services.</p>
<i>Ticket</i>	<p>A ticket in cleverQ is a waiting tag. It can be a classic waiting ticket printed on paper or an electronic waiting ticket (→ e-ticket).</p>

	<p>Each ticket has a unique → ticket number, which appears on the display in the waiting area when the ticket is called.</p> <p>Optionally, a ticket can also contain a → QR code, which can be used for automatic access control, for example.</p> <p>Tickets can have certain states: There are → closed tickets and → active tickets. Active tickets can in turn be: → waiting tickets, → called tickets, or → parked tickets.</p>
<i>Ticket number</i>	<p>A unique ticket number identifies each ticket and later appears on the → display in the waiting area when the ticket is called.</p> <p>Usually the ticket number consists of one or more letters followed by a consecutive number. Example: <i>A000</i> to <i>A999</i> for the first service, <i>B000</i> to <i>B999</i> for the second service, <i>C000</i> to <i>C999</i> for the third service, etc. Optionally, ticket numbers can also use letters that identify the particular service, such as in a government agency, for example, <i>I...</i> for "Individuals..." or <i>B...</i> for "Businesses...".</p>
<i>Ticket printer</i>	<p>Ticket printers are special printers for printing classic waiting tickets on paper. Usually, these printers use specially designed small paper rolls.</p>
<i>Token</i>	<p>In the context of software and in cleverQ, a token is an object for access control. Within cleverQ, you need various tokens generated by cleverQ so that the various hardware components of cleverQ, such as displays, touchscreens and printers, can access cleverQ and receive data from cleverQ.</p>
<i>Touchscreen</i>	<p>In conjunction with cleverQ, such touchscreens are used to enable customers to request tickets. Unlike with a simple push button, on a touchscreen you can ask your customers for which service and requests exactly a ticket should be created and then issue the ticket accordingly based on the selection.</p> <p>You can also use a touchscreen to give instructions, have reservation codes entered, or let customers know if there are temporarily no more tickets available.</p>
<b>U</b>	

<i>URL</i>	<p>URL stands for "Uniform Resource Locator".</p> <p>Web address in the form <i>https://www.your-organization.org/your-page.html</i>.</p>
<i>User</i>	<p>A user in the sense of cleverQ is an individual person who sets up, configures, or uses cleverQ on a → desk.</p> <p>A user is not to be confused with a → customer. Customers are the actual end users of cleverQ, while users operate cleverQ for their customers. A user is thus typically an employee in a government agency, company, or other organization who uses cleverQ to handle their appointment bookings and call tickets pulled from customers.</p> <p>A customer normally only sees a → touchscreen from cleverQ for requesting tickets, the → display in the waiting area, and possibly the → web appointments page or the → cleverQ App. A user sees the → administration interface (rights-dependent), one or more → desks, and, if needed, the web appointments page.</p>
<b>W</b>	
<i>Waiting ticket</i>	<p>A waiting → ticket has not yet been → called.</p> <p>→ Parked tickets are not waiting tickets.</p>
<i>Waiting list</i>	<p>For various reasons, it may happen that no appointments can currently be booked for a service.</p> <p>Normally, customers then receive a corresponding message on the web appointments page and in the cleverQ App and are prompted to try again later.</p> <p>If a waiting list has been set up for a service, customers will equally not receive an appointment immediately on the web appointment page in such a case, but they can put themselves on this waiting list. If it is then a customer's turn on the waiting list, the customer can book the actual appointment.</p> <p>A waiting list should not be confused with a → waiting room page.</p>
<i>Waiting room page</i>	<p>Under special circumstances, it can happen that too many customers access a web appointment page at the same time</p>

	<p>and try to book an appointment there. In extreme cases, this can then lead to the server being overloaded, ultimately making it impossible to book appointments at all.</p> <p>To prevent this, cleverQ can display a virtual "waiting room page" if necessary. On this page, customers are queued up in a way similar to a real waiting room and are only redirected to the actual web appointments page when sufficient capacity is available there again.</p> <p>A waiting room page should not be confused with a → waiting list.</p>
<i>Walk-in customer</i>	<p>A so-called walk-in customer is a customer who arrives on site without an appointment. In this case, the customer either pulls a → ticket on site or an e-ticket in the → cleverQ App shortly before arriving. cleverQ then immediately adds the ticket to the current queue of the respective service.</p> <p>The opposite of a walk-in customer is a → scheduled customer.</p>
<i>Web appointments page</i>	<p>The web appointments page is a special webpage provided by cleverQ where customers and employees can book appointments.</p> <p>The web appointments page can be displayed in any web browser. The cleverQ App is not needed.</p> <p>You can link to the web appointments page from your own website, for example. You can adapt the design of the web appointments page to your own site-specific design.</p>
<i>Web package</i>	<p>Should you ever have special design requirements that cannot be solved with the cleverQ on-board resources, we can create a so-called web package for you as a service. A web package contains a page customized according to your needs, including all files required by this page (such as images). This is possible, for example, for → desks, → displays, the → web appointments page, and an additional → landing page.</p> <p>When a web package exists, the web package overwrites the corresponding settings in the cleverQ configuration.</p>

*Weekly schedule*

A weekly schedule determines at which times on which days of a particular calendar week appointments will be bookable, as well as the maximum number of appointments that can be booked in each case. Each weekly schedule is based on a → schedule template.

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