

Digital Reception setup guide

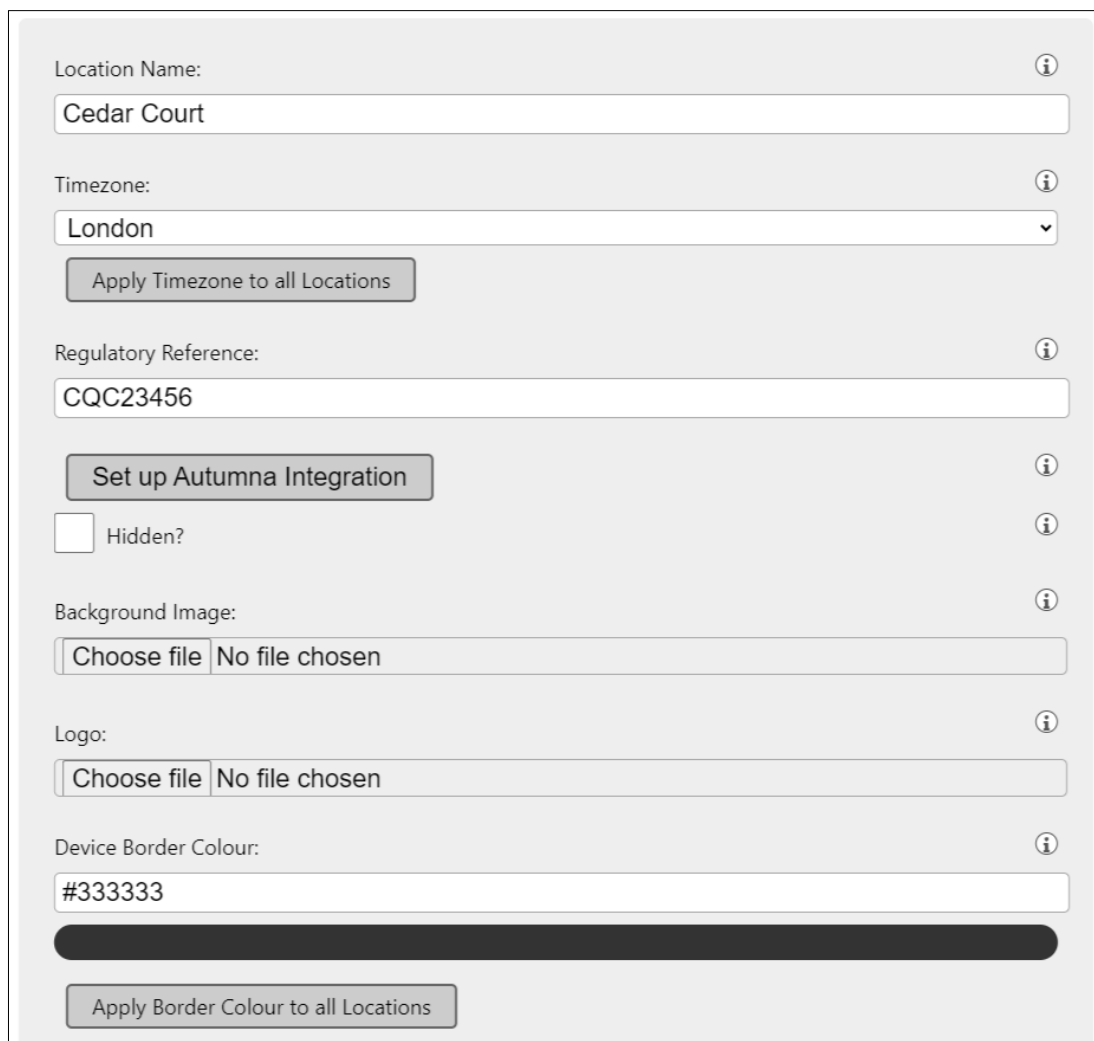
This guide is to help you set up your Digital Reception for the first time, covering the first steps you will want to take once you have access to the system. These steps include customising your Location, creating Profiles for visitors, and creating Devices for Digital Reception to be used on.

customising your location

The locations you can use for Digital Reception will be set up for you before you can access the system, but you will be able to customise them; choosing what messages the devices for this location will display when people use it to sign in and out. To edit a location:

- Select the **Locations** tab
- Open the location you wish to customise
- Click **Edit Location** in the top right of the page

The edit panel will appear, and you are free to make changes.



The screenshot shows a web-based form for editing a location. The form is titled 'Location Name:' and contains several input fields and buttons. The 'Location Name' field is set to 'Cedar Court'. The 'Timezone' dropdown is set to 'London', with a button 'Apply Timezone to all Locations' below it. The 'Regulatory Reference' field is set to 'CQC23456', with a button 'Set up Autumna Integration' below it. There is a checkbox for 'Hidden?' which is currently unchecked. The 'Background Image' section has a 'Choose file' button and a 'No file chosen' label. The 'Logo' section also has a 'Choose file' button and a 'No file chosen' label. The 'Device Border Colour' field is set to '#333333', with a color picker bar below it and a button 'Apply Border Colour to all Locations' at the bottom. Information icons (i) are present next to most fields.

Location Name: Cedar Court

Timezone: London

Apply Timezone to all Locations

Regulatory Reference: CQC23456

Set up Autumna Integration

☐ Hidden?

Background Image: Choose file No file chosen

Logo: Choose file No file chosen

Device Border Colour: #333333

Apply Border Colour to all Locations

There are several things on here you can update, including:

- **Location Name** – The name of the home
- **Background Image/Logo** – You can upload an image to display on the background of this location's devices, and a logo that appears next to the welcome message
- **Device Messages** – This includes the Welcome Message at the top of the devices, the Help Message in the centre and Thank You messages upon visitors arriving and leaving
- **User Access** – You can choose which users can select this location when setting up Digital Reception on a device

The screenshot displays a configuration panel for a location named 'Cedar Court'. It is divided into four sections, each with an information icon (i) in the top right corner:

- Welcome Message:** A text input field contains 'Welcome to Cedar Court'. Below it is a button labeled 'Apply Welcome Message to all Locations'.
- Device Help Message:** A larger text area contains two lines of text: 'Please select the type of person you are, or scan the QR code to continue.' and 'For help to know how to use a QR scanner please visit www.dreception.com/help'. Below the text area is a button labeled 'Apply Device Help Message to all Locations'.
- Thank You Message on Arrival:** A text input field contains 'Thank you. Have a great day.'. Below it is a button labeled 'Apply Thank You Message on Arrival to all Locations'.
- Thank You Message on Leaving:** A text input field contains 'Thank you. Please visit again soon.'. Below it is a button labeled 'Apply Thank You Message on Leaving to all Locations'.

creating profiles

The next step of setup is to create Profiles. Profiles are types of people you want to use Digital Reception to sign in and out, Visitors, Staff, Residents etc. You can have as many profiles as you want, and they can be used at any location, and even at any part of any location. You can have an entrance to a location that allows visitors and a separate entrance that allows staff if you want. To create a profile:

- Select the **Profiles** tab
- Click **New Profile** in the top right corner

The new profile panel will appear for you to fill out.

The screenshot shows a web form for configuring a user profile. It includes fields for 'Profile Name', 'Display Name', and a 'Categorise as' dropdown menu. Below these is a section for 'Required Fields' with a table of options.

	Called	Required	Optional	Not Used
First Name Called:	<input type="text" value="First Name"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Second Name Called:	<input type="text" value="Last Name"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Email Called:	<input type="text" value="Email Address"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Phone Called:	<input type="text" value="Phone Number"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

There is a lot that can be filled out at this stage; however, the important parts are right at the top:

- **Profile Name** – What you want to call this profile to identify it
- **Display Name** – How the name appears for people to choose when signing in
- **Categorise as** – What type of visitor they are; this is used in feedback analysis
- **Required Fields** – There are 4 fields that can be filled out when signing in: First Name, Second Name, Email and Phone. You can customise how these fields appear when people sign in, and if they are required, optional, or not used when signing in.

There are additional fields that you can fill out at this stage, such as if the device takes a picture when signing in, what information and messages are displayed when this profile signs in or out and what feedback they can leave when signing out. All this information can be customised after setup, so you can always come back to this later.

creating devices

With your locations and profiles set up, you can then set up your devices which your visitors will be using to sign in and out. You can have multiple devices for each location and can specify which profiles can use these devices. To create a device:

- Select the **Devices** tab
- Click **New Device** in the top right of the page

The new device panel will then appear for you to fill out.

Device Name:

Location: Select

QR Code Size:

☒ Default

☐ Small

Default QR size

Reduced size

There are only a few things to fill out for a device, as most setup is done via the locations and profiles. For the device you need to fill out:

- **Device Name** – What you want to call the device to identify it
- **Location** – Which locations this device is for
- **QR Code Size** – The device can display a QR code for people to scan and sign in; you can choose to display them full size or a smaller, reduced size.
- **Profiles** – Which profiles can use this device to sign in and out. Any profiles you have created will display in a list, and you can use the tick boxes to select which can use this device.

Once these are filled out, click the **Save** button and the device is ready to use. Please check our other guides on how to set up Digital Reception on Android and Apple devices, as well as configuring custom attributes for profiles and the types of feedback that visitors can leave for you.