111.02550 - Editing a walk-in using Front of House

OVERVIEW	WORKFLOW	DETAIL	POLICY	LEGISLATION	EXTRA

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111.02550 Editing a walk-in using Front of House - Overview

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This procedure explains how to edit a walk-in using the Front of House (FoH) function within Customer First. It includes instructions for editing using a desktop computer or an iPad.

The options available to be changed for a walk-in are:

- Priority
- Express
- Queue and Service Category
- Status
- Notes

For example, the status would need to be changed when the customer has left the site before being seen or when the walk-in has been booked accidentally.

🔘 *Extra* contains a link to a video that demonstrate how to use various features of Customer First.

Other related links

🔘 *Booking a walk-in using Front of House (FoH)*

🔘 *Completing a walk-in using Front of House (FoH)*

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Procedure last issued 2013/08/04, see Procedural Updates and Current Daily Updates for details of major e-Reference updates.

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111.02551 Editing a walk-in using Front of House - Workflow

Is the walk-in to be edited on a desktop computer?	**Yes** ⊜	• Select the **Waitroom** button in the screen header. • Open the **Waitroom** section by clicking on the twisty arrow. • Select the **Walk-in ID** to be edited from the available list and *edit as required*. • Select the **Save** button.
No ①		

To edit the walk-in on an iPad:

• Tap the **Walk-in** to be edited.
• Edit the **Walk-in** as required by tapping *the relevant fields*.
• Tap the **Save** button located at the top right hand corner of the screen.

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111.02552 Editing a walk-in using Front of House - Detail

Step	Action
1	Is the walk-in to be edited on an iPad or a desktop computer? • If on an **iPad**, go to Step 2.
2	**iPad: Select walk-in** Tap the **Walk-in** to be edited.
3	**iPad: Edit walk-in** Edit the **Walk-in** as required by tapping the relevant fields. Options include: • Priority • Express • Queue and Service Category • Status • Notes **Note:** the status **Abandoned** is to be used when the customer has left the site. The status **Cancelled** is to be used when the walk-in has been booked accidentally.
4	**iPad: Save** Tap the **Save** button located at the top right hand corner of the screen. **Note:** to navigate back to the **Waitroom** without saving changes, tap the **Cancel** button at the top left hand corner of the screen. Procedure ends here.
5	**Desktop: Open waitroom** Select the **Waitroom** button in the screen header.

		Select the **Waitroom** button in the screen header. Open the **Waitroom** section by clicking on the twisty arrow.
6	**Desktop: Select and edit walk-in**	Select the **Walk-in ID** to be edited from the available list. The Walk-in screen will display. Edit as required by selecting the relevant fields. Options include: • Priority • Express • Queue and Service Category • Status • Notes **Note:** the status **Abandoned** is to be used when the customer has left the site. The status **Cancelled** is to be used when the walk-in has been booked accidentally.
7	**Desktop: Save**	Select the **Save** button. **Note:** to navigate back to the **Waitroom** without saving changes, select the **Cancel** button.

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111.02553 Editing a walk-in using Front of House -
Extra
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This page contains a link to a video that demonstrates how to use various features of Customer First.

Video demonstration

📄 Customer First Established Support Links

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