Customer Engagement Center (CEC)

User Guide



Welcome to Qless!

The Customer Engagement Center (CEC) offers many advantages:

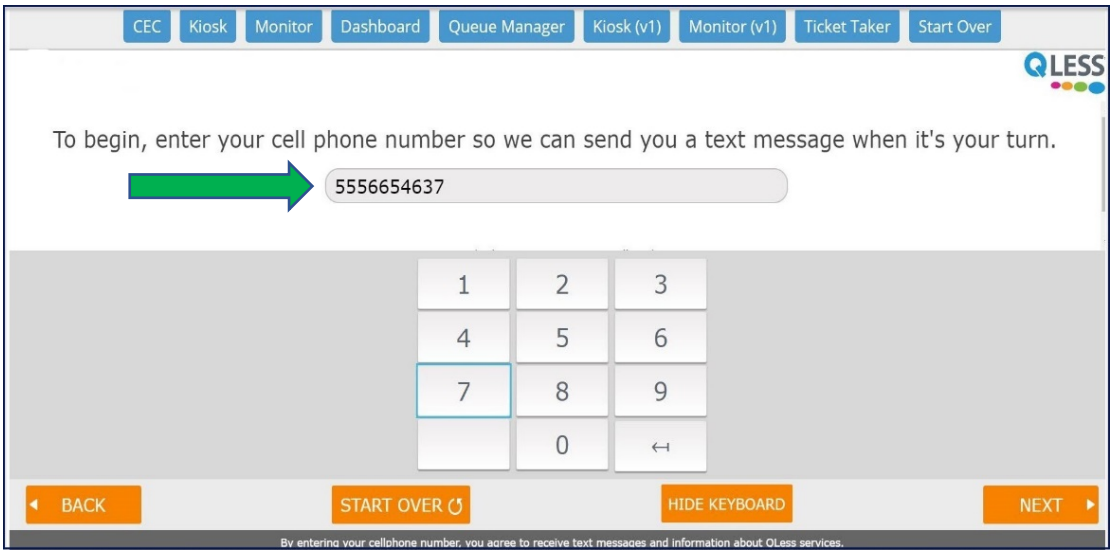
- Streamlined navigation & management
- Compatible with most browsers such as Firefox & Chrome
- No more widgets

Joining a Queue

A customer can join a queue several ways
(Note: Options will vary based on the account configuration):

- SMS Text Messaging
- QLess App (available on Android or iPhone)
- Home Kiosk: A hyperlink that allows you to join the queue over the Internet
- Main Kiosk: The physical iPad at a location

When joining a queue, the customer can enter their cellphone number to receive text messages to inform them of their status in line:

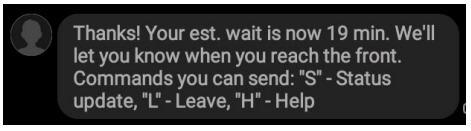


TIP

The customer can also choose to join this queue without entering their cellphone. They must watch the live monitor to view their status at the location.

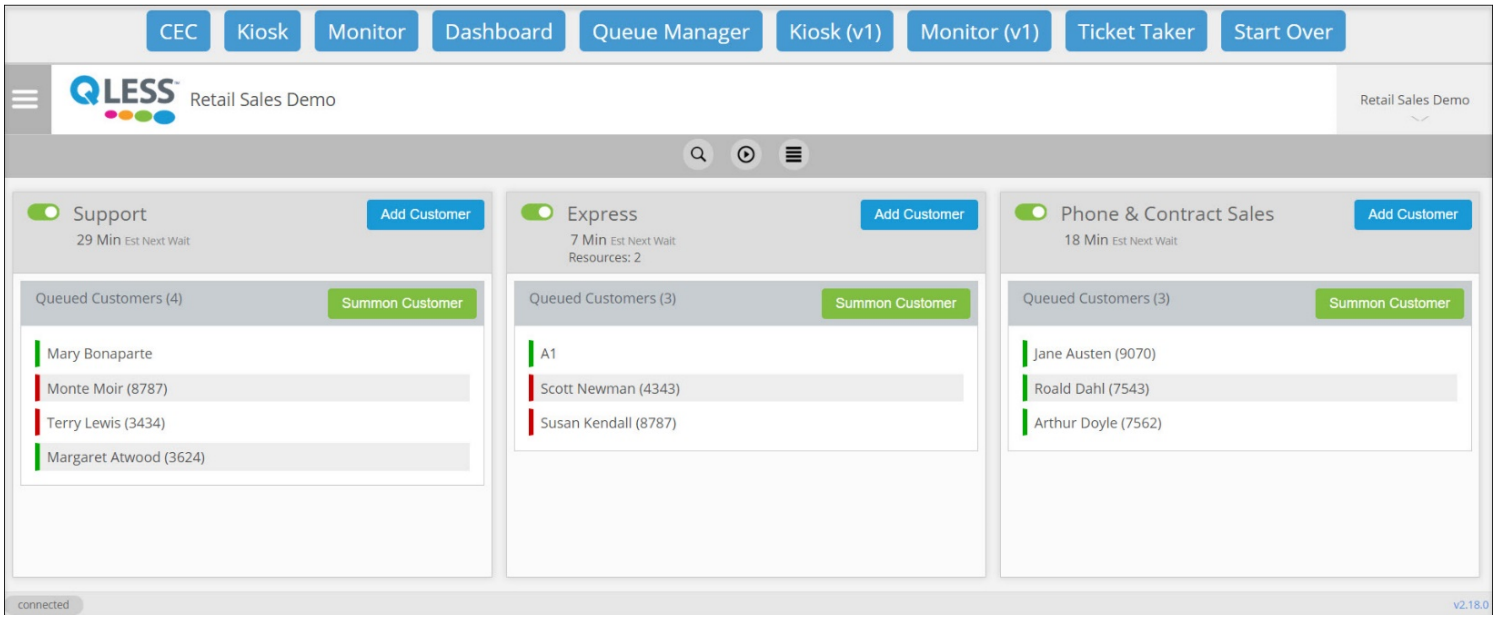
After the customer enters their cellphone number, they will receive a text message alerting them that they have joined the queue (actual message text varies based on the configuration).

Customer's Text Message:
In Queue Confirmation



The Customer Engagement Center (CEC)

When the customer joins a queue, you can find them in the Customer Engagement Center (CEC):



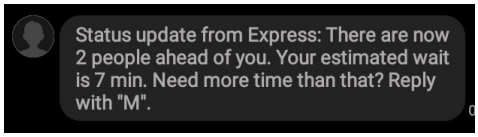
Responding to Text Messages

The customer can respond to the text messages received from the queue by typing in a letter for the following responses:

- **C:** Cancel (appointment)
- **H:** Help
- **J:** Join the line
- **L:** Leave the line
- **M:** need More time
- **n#:** Notify me with # minutes before
  (Example: **n5**- you will be notified when you are 5 minutes from the front of the line)
- **S:** Status update (**see example below**)
- **STOP** - stop receiving all texts

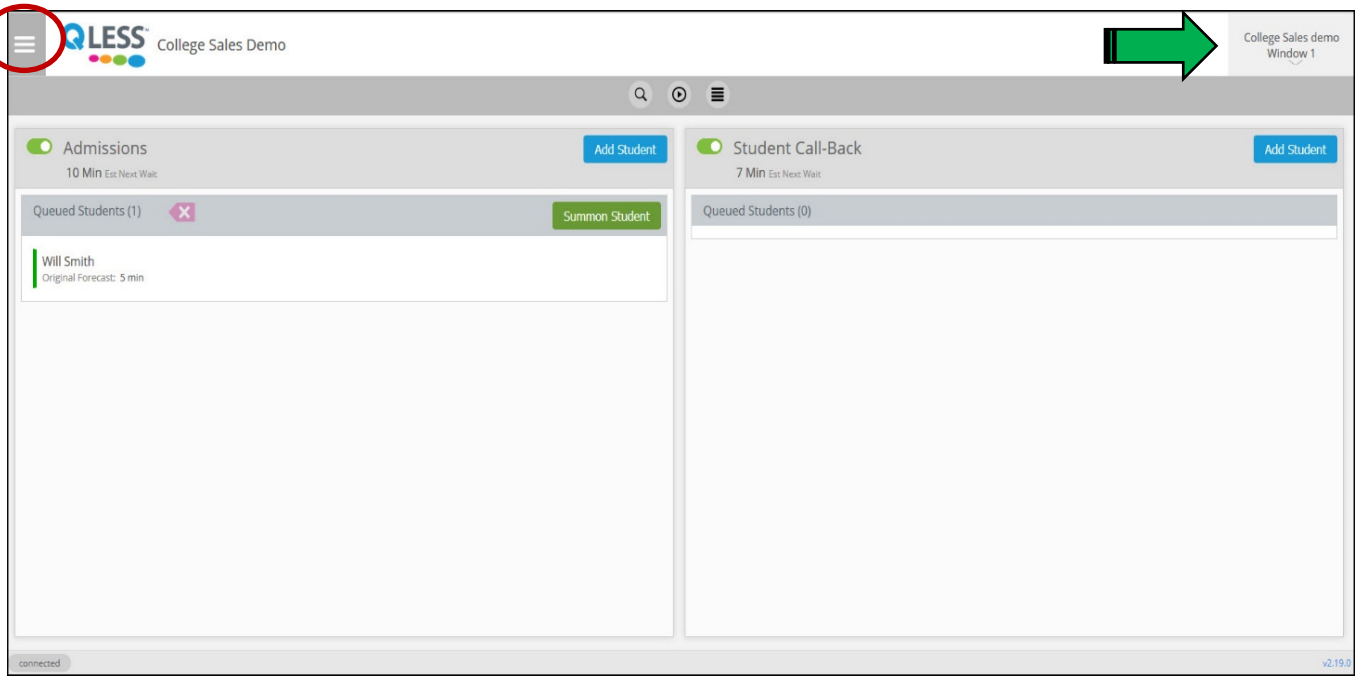
A customer can select to receive status updates that will provide the number of people ahead of them in the queue and the estimated wait time.

Customer's Text Message: Status Update

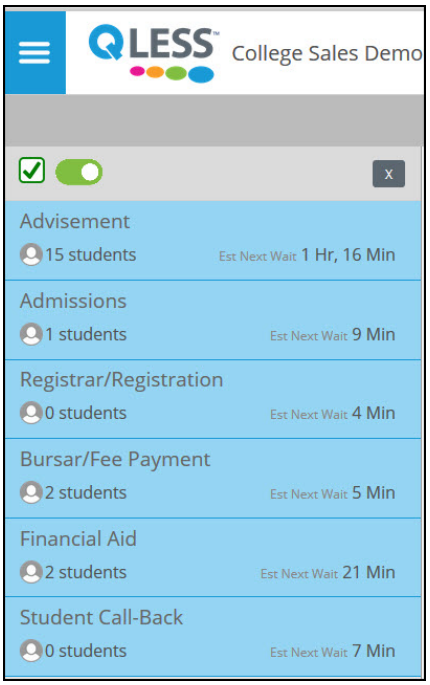


Using the Customer Engagement Center Menus

QLess features two menus that will allow you to manage your views in the queue and see the additional products in QLess, the Hamburger menu (left) and Dropdown menus (right):

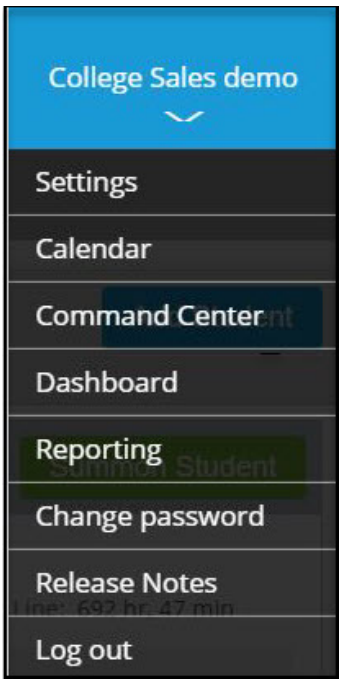


The Hamburger Menu



You can select what queues you can view in the left column by clicking the hamburger menu in the upper left-hand corner of the screen. Click to select which queues are shown.

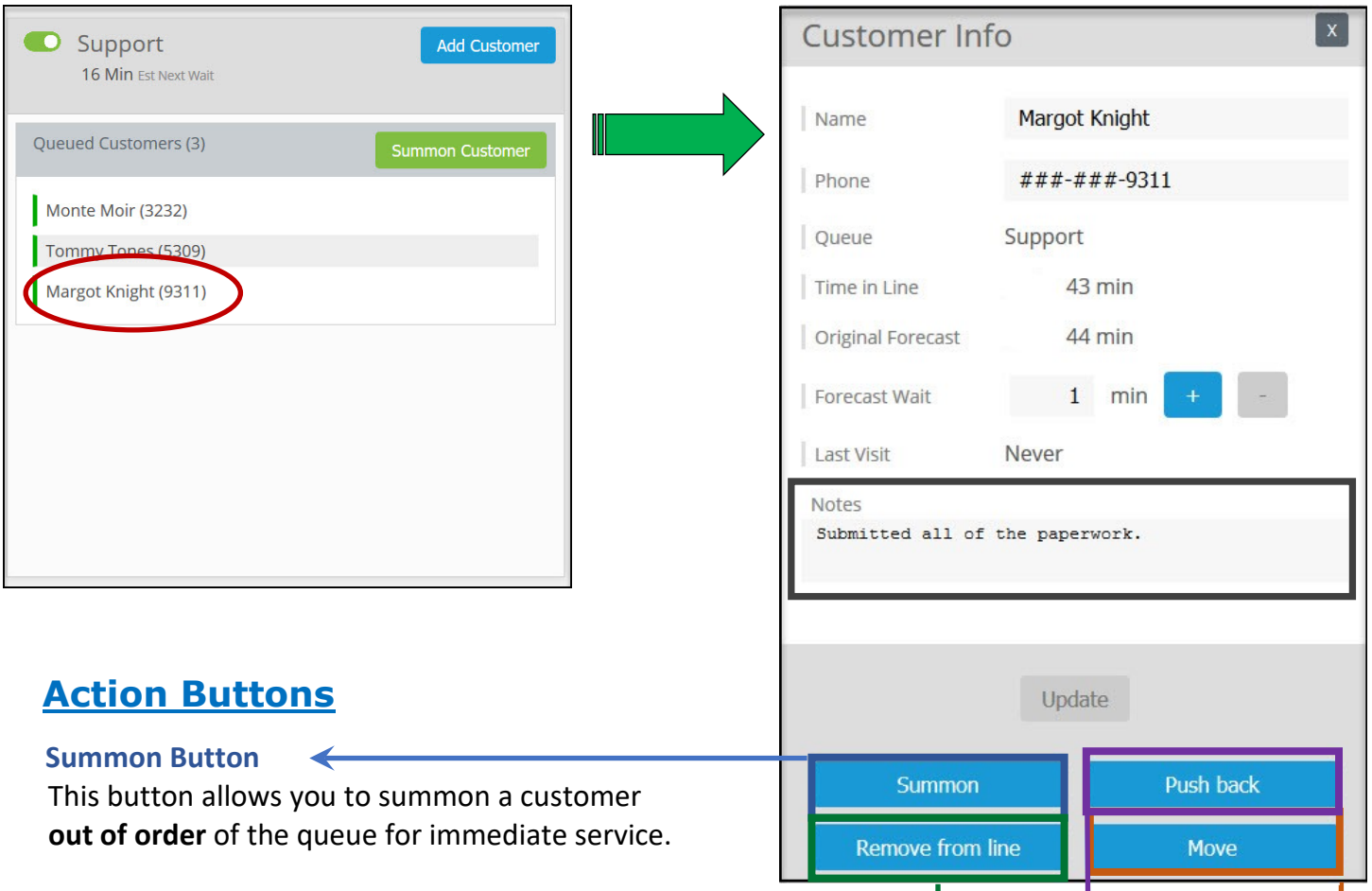
The Dropdown Menu



You can navigate to other products in the QLess suite by clicking the upper right-hand corner down arrow.

Reviewing a Customer's Information

After a customer enters the queue, click on their name to open the Customer Info screen to review their information. The Customer Info screen displays the customer's name, phone number (if applicable), Queue, the time in line and the original forecasted time. You can enter any comments regarding the customer in the Notes box and press the **Update** button to save. The Action buttons are used while the customer is in the queue. (see below).



Action Buttons

Summon Button
This button allows you to summon a customer **out of order** of the queue for immediate service.

Remove from Line
Allows you to immediately take a customer completely out of the queue.

Push Back
Allows you to provide additional time for a customer to visit you for services.

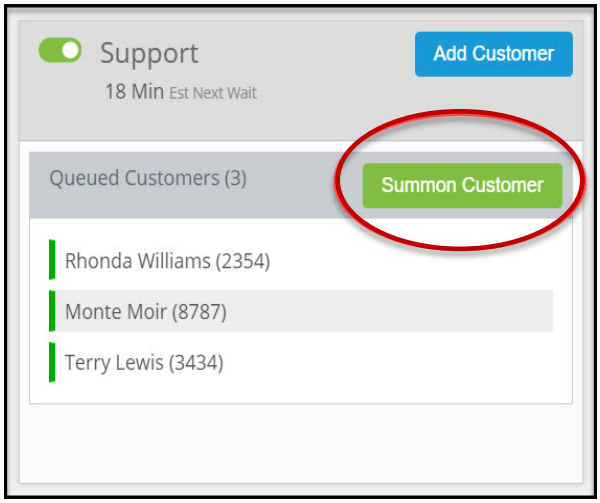
Move Button
Allows you to immediately move a customer to a different queue for service.



The Action Buttons are to be used only if there are any special changes needed as the customers enter the queue.

Queue Management: Summon, Arrived & End Service

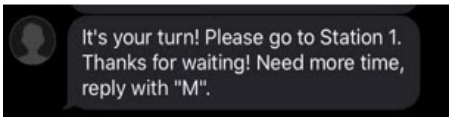
In order to service a customer, they must be summoned from the queue.



To summon a customer, press the **Summon Customer** button at the right of the Queued Customers list to display the pop-up window.

When summoned, the customer will receive a text message alert.

Customer's Text Message: Summoned for Service





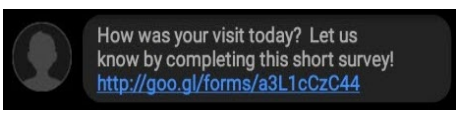
Once the customer has arrived, press the **Arrived** button in the pop-up window.

After pressing the Arrived button, the customer will appear on the Now Serving bar located above the list of queues. When your service with the customer has completed press the **End Service** button to the right of the Now Serving status bar:



At the end of service, a text message is sent containing a link to a customer service survey (if applicable).

Customer's Text Message: End of Service

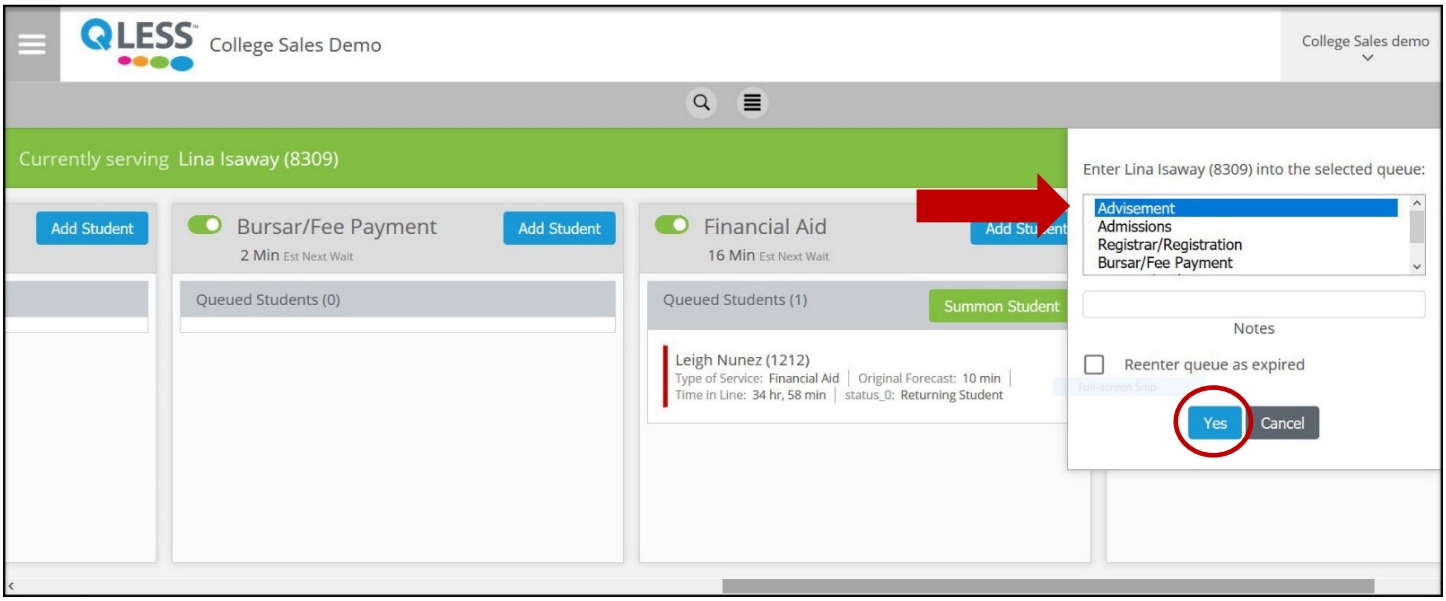


Queue Management: Transferring a Customer to Single Queue

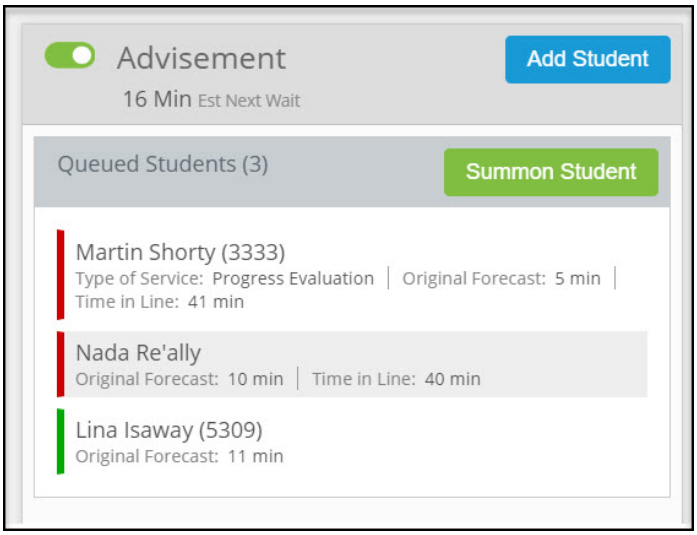
While assisting the customer if you need to send them to a different queue, press the **Reenter Queue** button to the right of the Now Serving bar:



Select the queue that you need from the list and press the **Yes** button to transfer the customer. Leave the Reenter queue as expired box unchecked**.**



The customer is now transferred to a different queue.
Once the customer is in the new queue they can be summoned as you would normally.



NOTE:
Leaving the Reenter queue as expired box checked will place the customer in the queue under expired. Expired customers will be featured later in this user guide.

Queue Management: Transferring a Customer to Multiple Queues

If the customer needs assistance from multiple queues, press the **Reenter Queue** button to the right of the Now Serving bar:



Hold down the applicable button (see below) on the keyboard and click on the multiple queues you need for the transfer. Leave the Reenter queue as expired box unchecked to transfer the customer into the queues and press the **Yes** button.

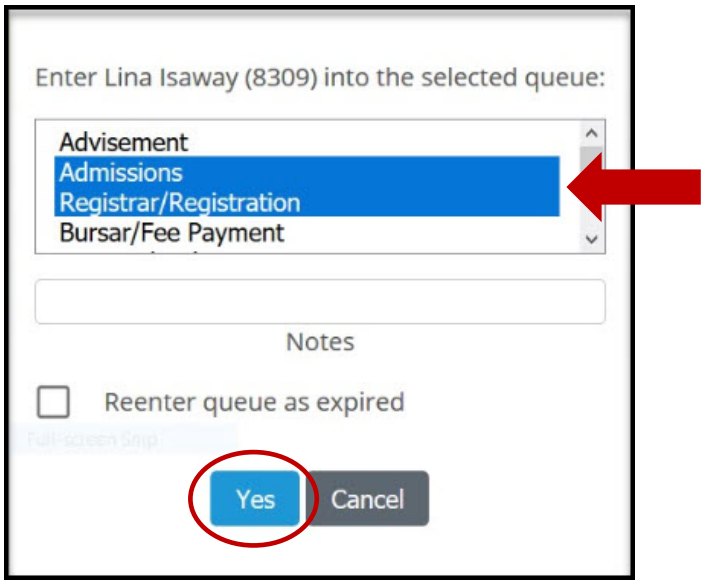
To Select Multiple Queues:

Windows PC: Hold down the **Control** button and select the multiple queues.

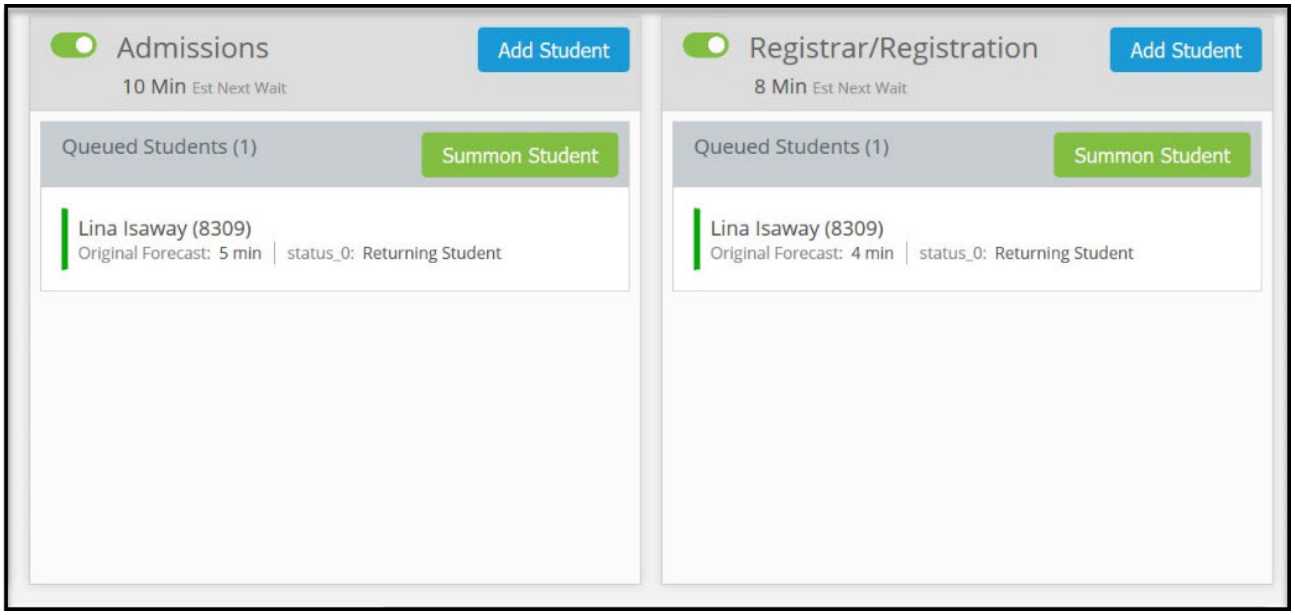


Mac: Hold down the **Command** button and select the multiple queues.





The customer is now transferred to the multiple queues.
Once the customer is in the new queues they can be summoned as you would normally.

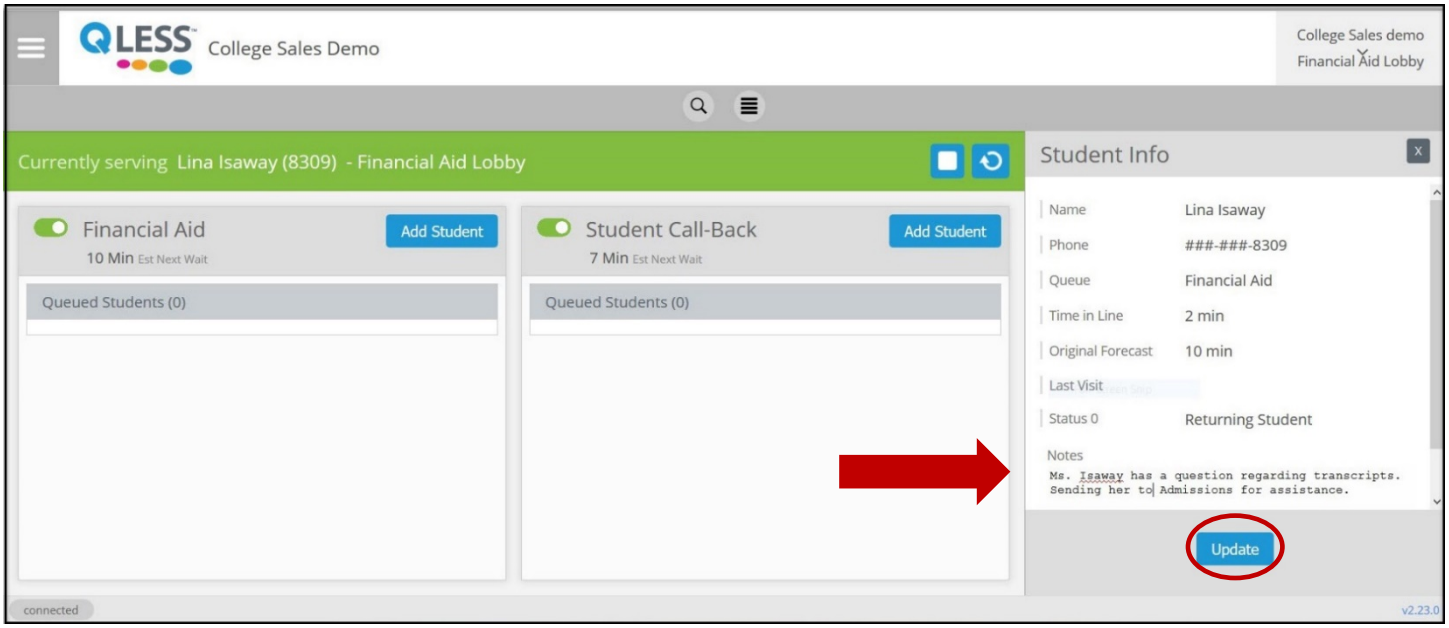


Entering a Note Before Ending Service or Transferring a Customer

You can enter a note on the Customer's Info screen to add any important information before ending service or transferring a customer. To add a note, click on the customer's name on the Now Serving bar:



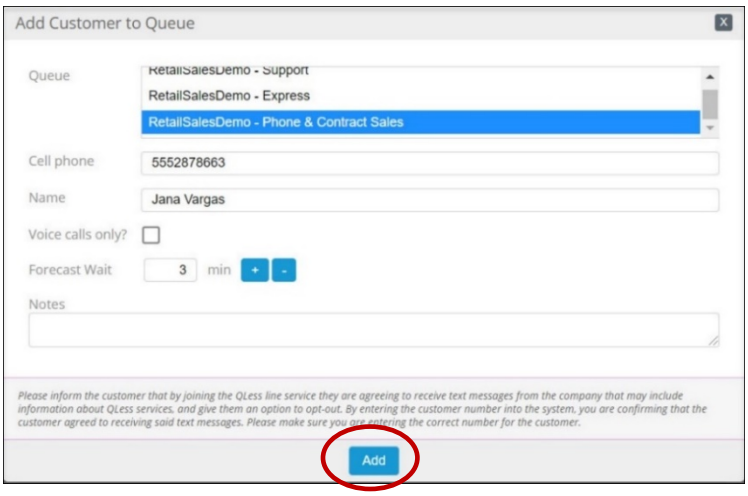
At the Customer Info screen, enter the text in the Notes field and press the **Update** button.



Manually Adding a Customer to a Queue

If the customer did not join the queue using the kiosk or SMS, you can enter them manually:

- Click the Add Customer button located to the right above the list of customers in the queue.
- Select a queue from the drop-down box.
- Select the type of service (if applicable).
- Click the **Add** button.

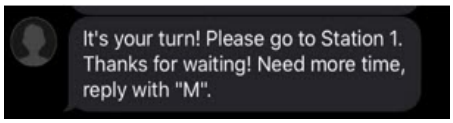


Queue Management: Expired Customers

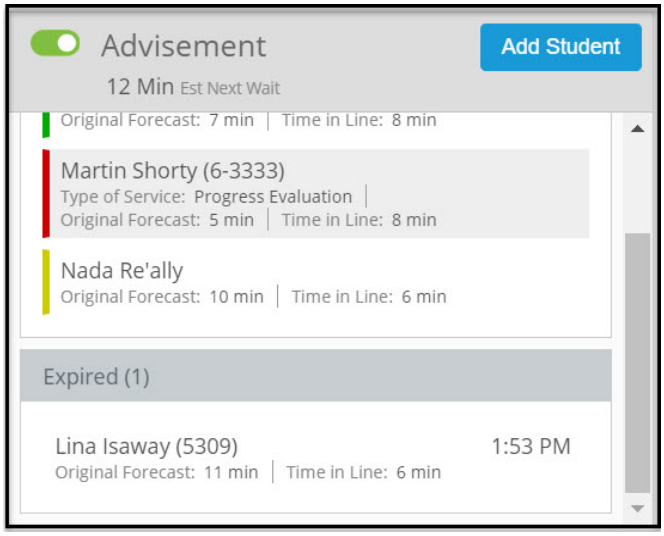
Once a customer has been summoned, they receive a text message that they have reached the front of the queue:

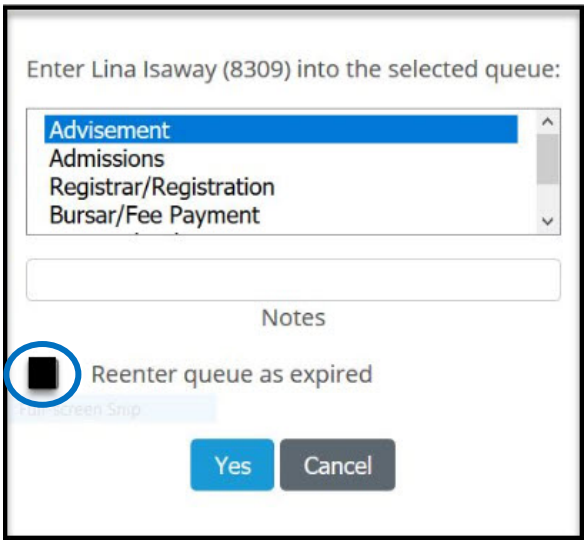
The Customer Engagement Center sends the customer an alert and sets a time for the customer to arrive.

Customer's Text Message: Summoned for Service



If a customer does not arrive after being summoned, the Customer Engagement Center will automatically place them into **Expired** status. The expired status places the customer in a holding position to allow them time to either rejoin the queue or arrive later.

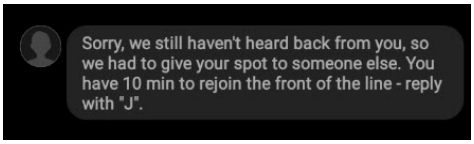




You can also manually place a customer into expired status by clicking the Requeue Button on the Now Serving bar and clicking the box next to **Reenter queue as expired.**

The customer will receive a text message informing them of their expired status.

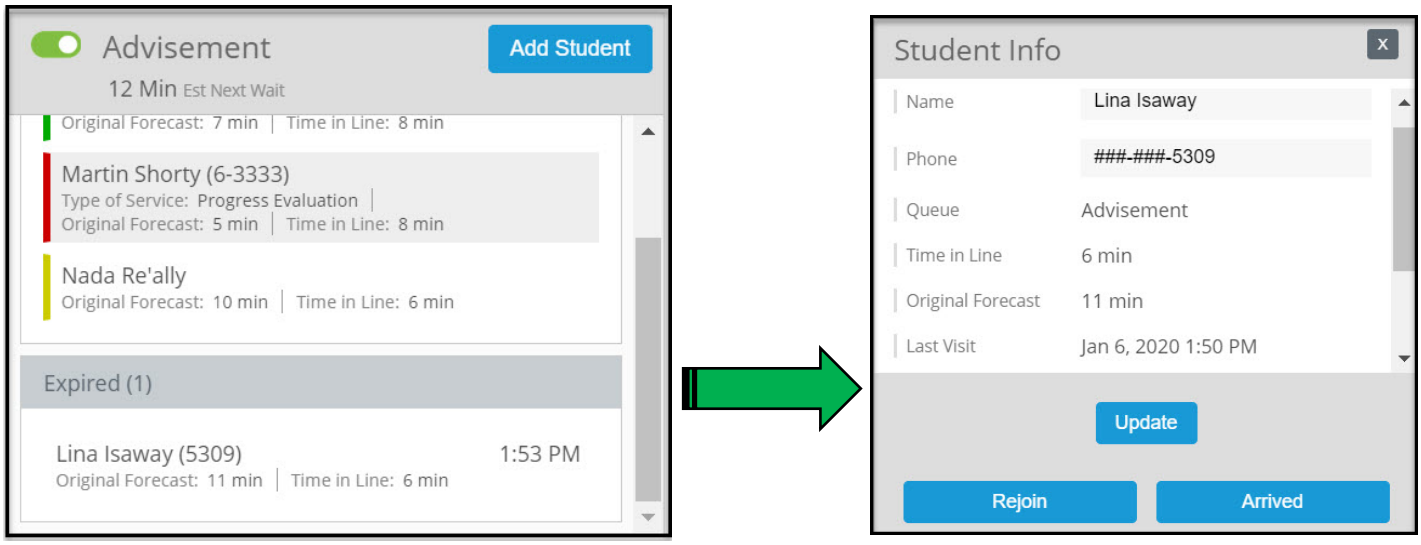
Customer's Text Message: Expired Status



Queue Management: Expired Customers (cont.)

To Bring a Customer Out of Expired Status:

1. Click on the customer in the Expired list to display the pop-up window.
2. At the pop-up screen select either **Rejoin** or **Arrived** action buttons to signal the customer's return to the queue.



Expired Customer Action Buttons



The **Rejoin** button places the customer back into the queue to be summoned again for service. Note: The customer is placed in the **front** of the queue.



The **Arrived** button places the customer into Now Serving status for immediate service.

Service Buttons

The Service Buttons are on the grey bar across the top of the queues:



These buttons allow you to perform additional services with the queue:

- 
  The **Search** button allows you to search for a customer by their first name or the last 4 digits of their telephone number.

- 
  The **Begin Service** button allows you to alert a customer for service without them joining the queue via the kiosk. This feature is mainly used when there isn't a wait for service, but you still want to track the data.

- 
  The **List View** button allows you to view the entire list of all the queued customers.

TIP: Make sure you **log out** of the Customer Engagement Center at the end of the day!