EZQUEUE · MAIN APP

Service Staff Manual

For tellers who call and serve clients at the counter.

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1 Sign in

Open EZQueue and sign in with your username and password.

What this is for

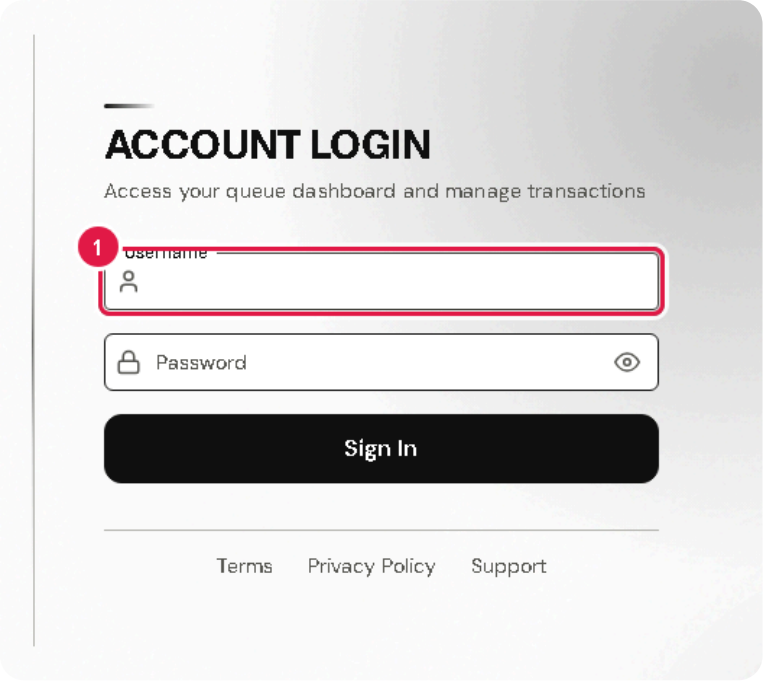
You need to sign in before you can call clients.

Before you start

- Your username and password.
- Access to your email, if this is a new computer.

Steps

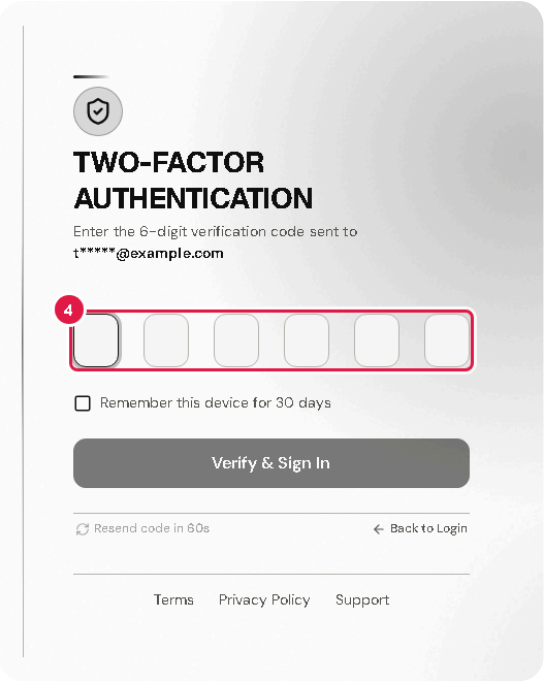
1 Type your username in the **Username** box.



2 Type your password in the **Password** box.

3 Tap **Sign In**.

4 If you see **Two-Factor Authentication**, check your email. Type the 6-digit code from the email.



5 On your own work computer, tick **Remember this device for 30 days**. Then you will not need a code each time.

6 Tap **Verify & Sign In**. Your **Dashboard** opens.

> **Tip** If the system asks you to make a new password, type it in **New Password** and again in **Confirm New Password**. Then tap **Update Password**.

If something goes wrong

- **No code in your email**: wait a minute, check your spam folder, then tap **Resend verification code**.
- **You forgot your password**: ask your office admin or the system admin to reset it.
- **Wrong page or stuck**: tap **Back to Login** and start again.

2 Check your station

Make sure you are linked to the right counter before you call clients.

What this is for

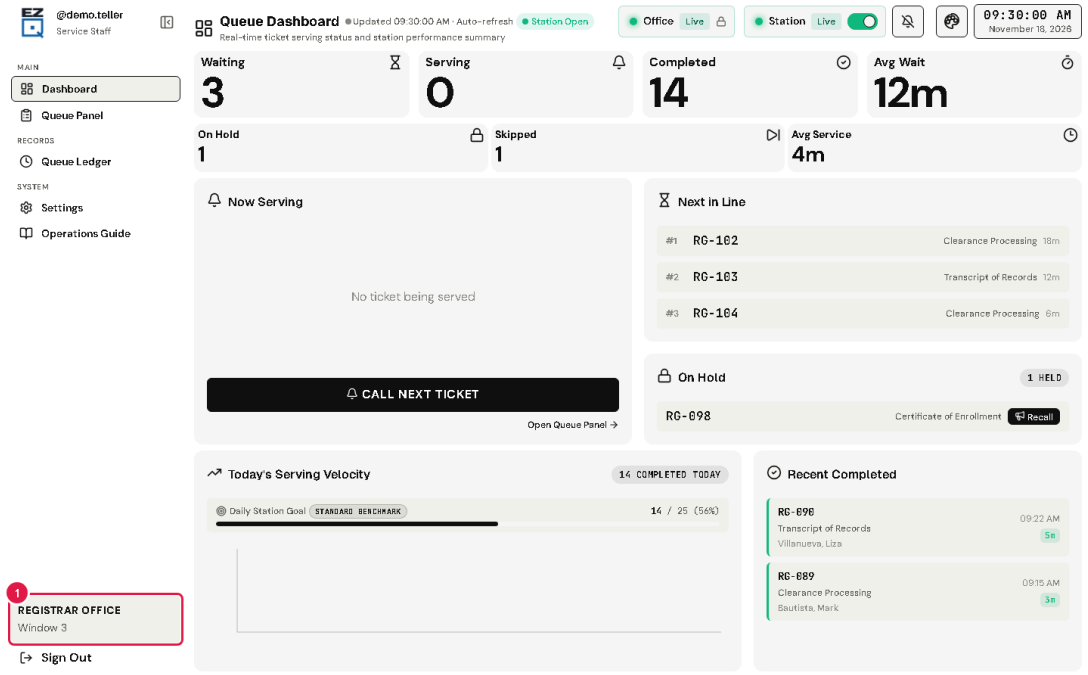
Your station is your counter or window, for example "Window 3". The TV screen tells clients which station to go to. You cannot call clients without one.

Before you start

- You are signed in.

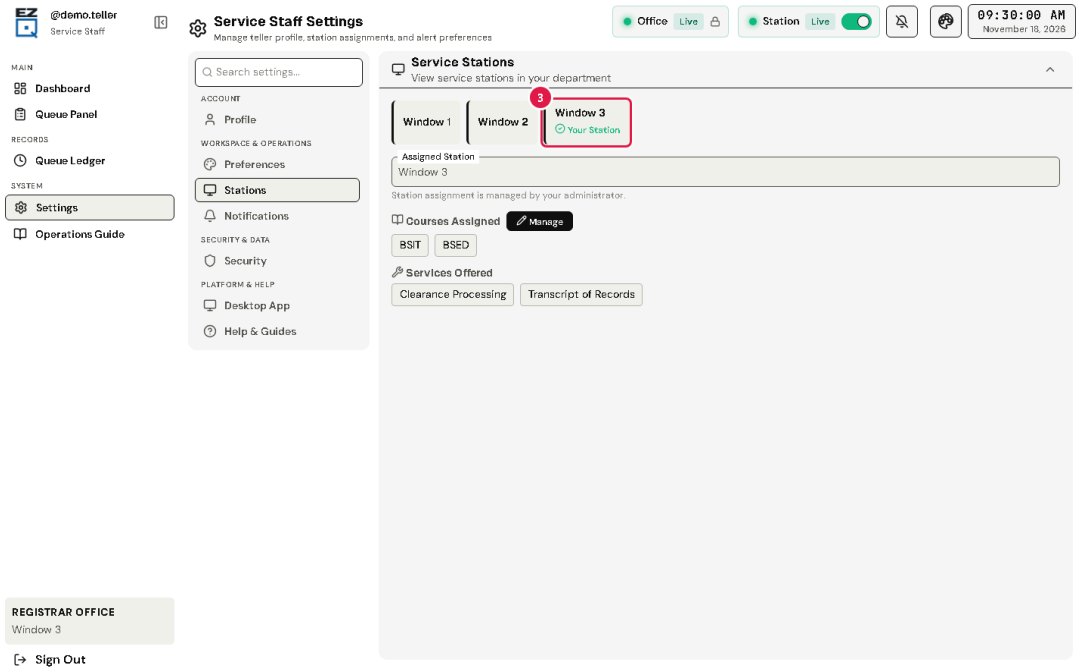
Steps

1 Look at the bottom of the left menu. It shows your office and your station.



2 To see more, tap **Settings** in the left menu.

3 Tap the **Stations** tab. Your station has the label **Your Station**.



4 Under your station you can see which services and courses it handles.

> ⚠ **Warning** Only an admin can change your station. If it is wrong, ask your office admin before you call anyone.

If something goes wrong

- **"No active station assigned" on the Queue Panel**: ask your office admin to give you a station.
- **The wrong station is shown**: do not call clients yet. Ask your office admin to fix it.

3 Show or hide your station on kiosks

Use the Station switch at the top to show or hide your station on kiosks.

What this is for

The chips at the top of the page show if your office and station are shown on kiosks.

Before you start

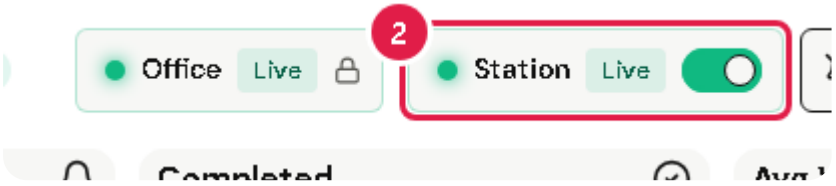
- You are signed in and have a station.

Steps

1. Look at the top of the page. The **Station** chip says **Live** (shown on kiosks) or **Hidden** (hidden from kiosks).

2. To change it, tap the switch on the **Station** chip.

3. The **Office** chip has a lock. Only the office admin can change it.



4 Read your dashboard

See how many clients are waiting and how much you have done today.

What this is for

The **Queue Dashboard** is the first page after you sign in. It shows the clients waiting for your station and your work today.

Before you start

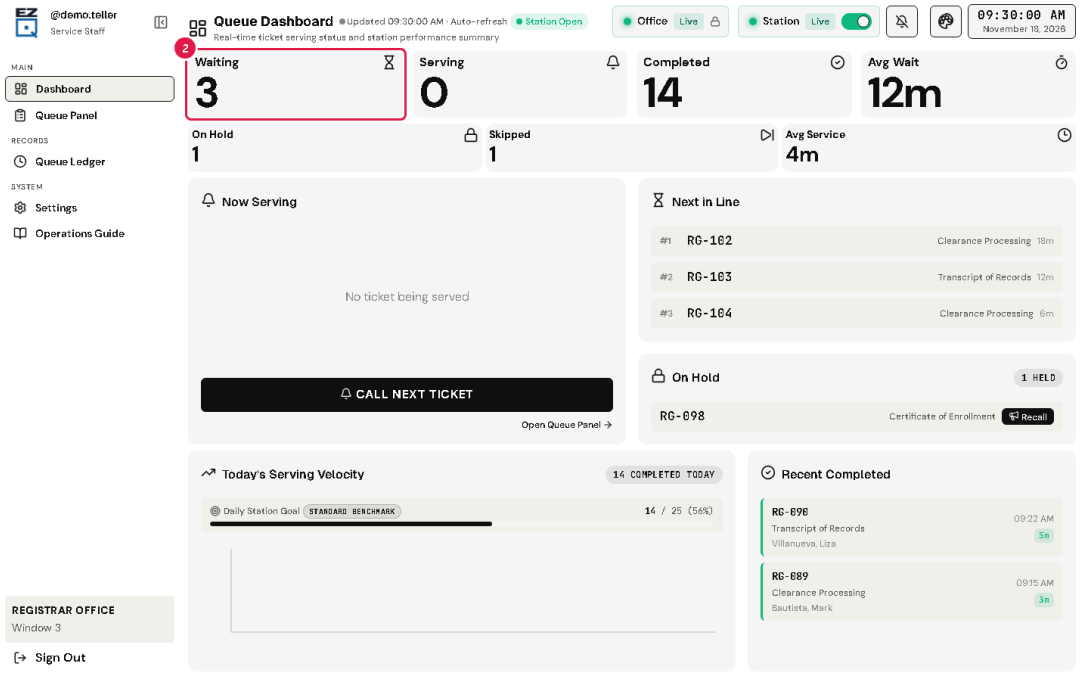
- You are signed in.

Steps

1 Tap **Dashboard** in the left menu.

2 Read the boxes at the top:

- **Waiting**: clients waiting for your station now.
- **Serving**: the client at your counter.
- **Completed**: clients you finished today.
- **Avg Wait**: how long your clients today waited before you called them, on average.



3 Point at a box, or tap it, to see more. For example, **Waiting** shows how many priority clients are in line.

> **Tip** The smaller boxes show **On Hold**, **Skipped** and **Avg Service**. **Avg Service** is how long you took per client today, from call to finish.

If something goes wrong

- **The numbers do not change**: check your internet connection. The page updates by itself every few seconds.

5 Call the next client

Call the next person in line to your counter.

What this is for

When you are free, you call the next client. Their number shows on the TV screen and is read out loud.

Before you start

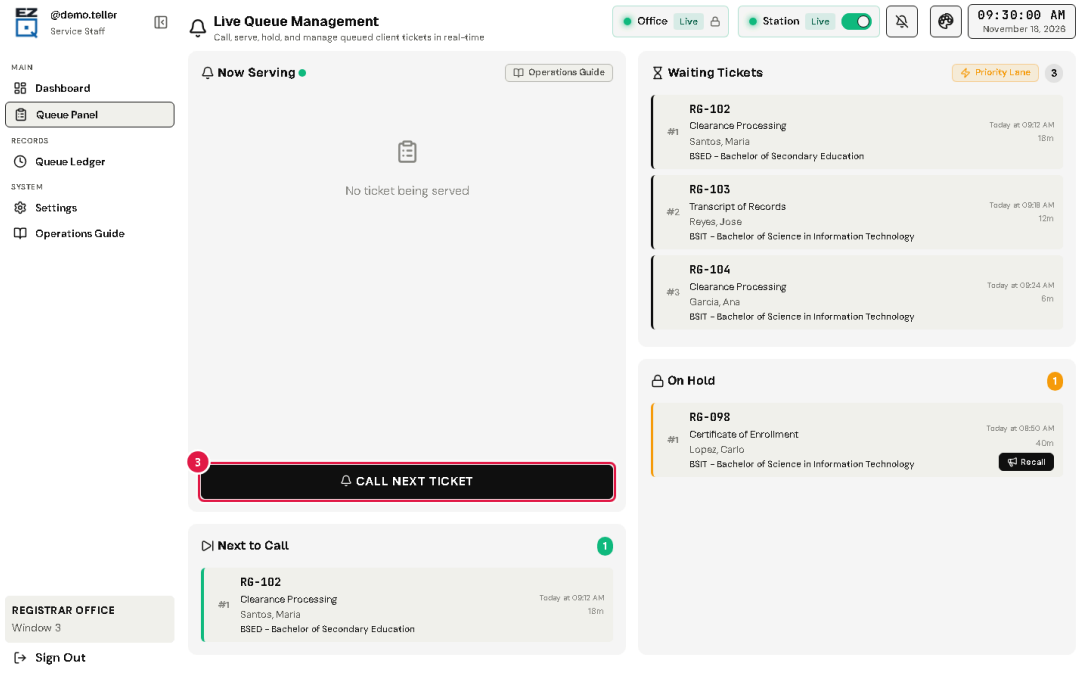
- You have a station (see **Check your station**).
- You are not serving anyone. Finish the client in front of you first.

Steps

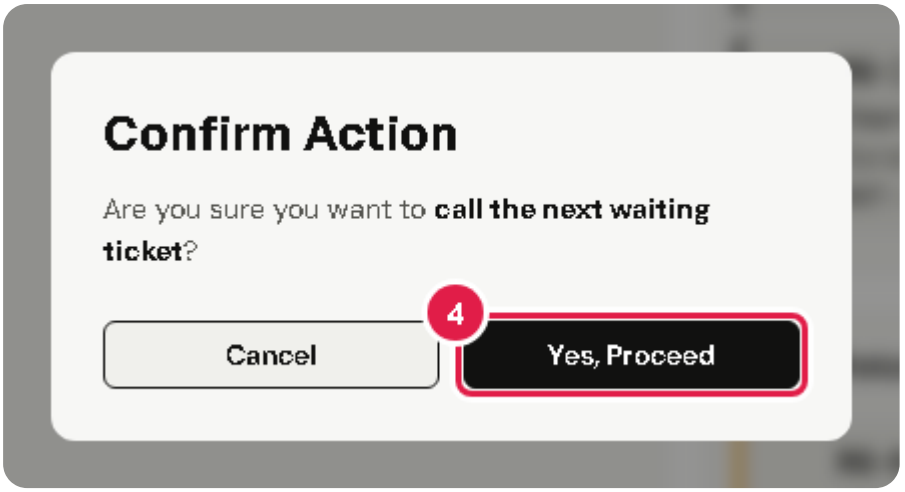
1. Tap **Queue Panel** in the left menu.

2. Look at **Next to Call**. It shows who comes next.

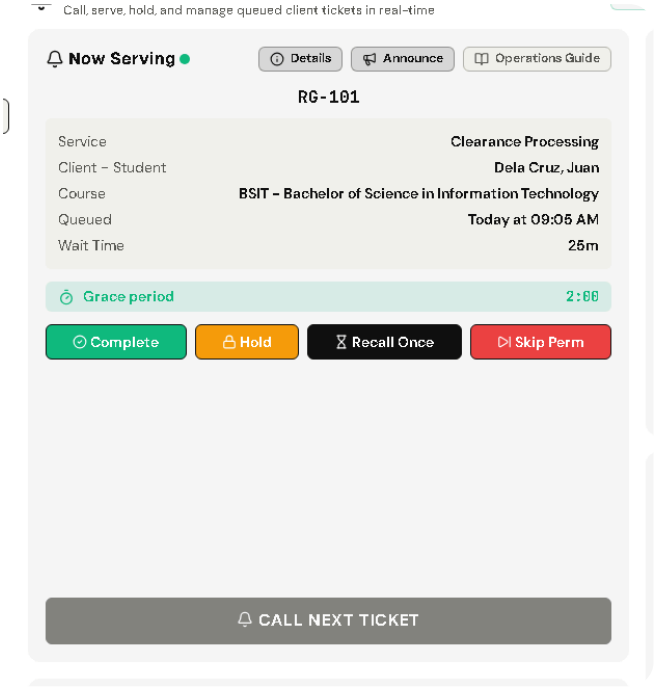
3. Tap **CALL NEXT TICKET**.



4 A window asks **Confirm Action**. Tap **Yes, Proceed**.



5 The ticket now shows under **Now Serving**, with the client's name and service.



6 Wait for the client to come to your counter. A **Grace period** timer counts down while you wait.

> **Tip** Tap **Details** to see everything about the ticket, like the client's contact and course.

If something goes wrong

- **CALL NEXT TICKET is grey**: you are still serving someone, nobody is waiting, or you have no station.
- **The client does not come**: see **When the client does not come**.

6 When the client does not come

Call the client again, give them one more chance, or skip them.

What this is for

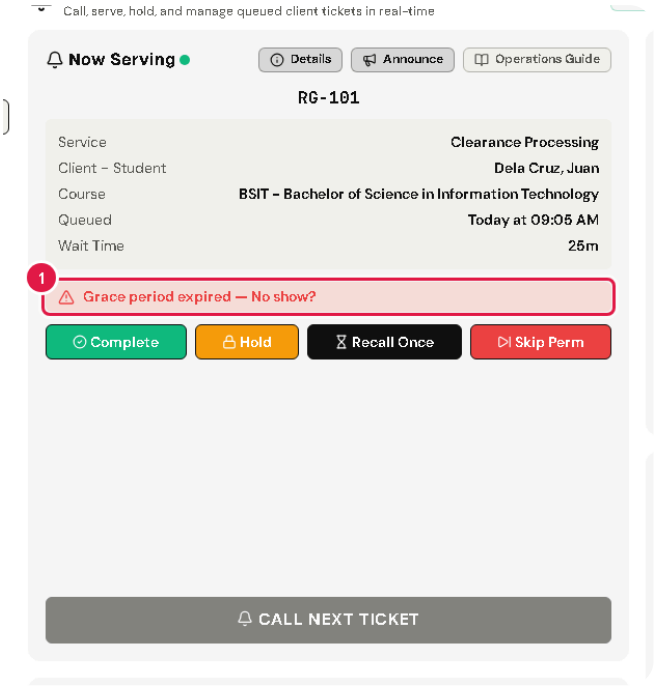
Sometimes a client does not hear their number. You can call them again, send them back into the line, or skip them.

Before you start

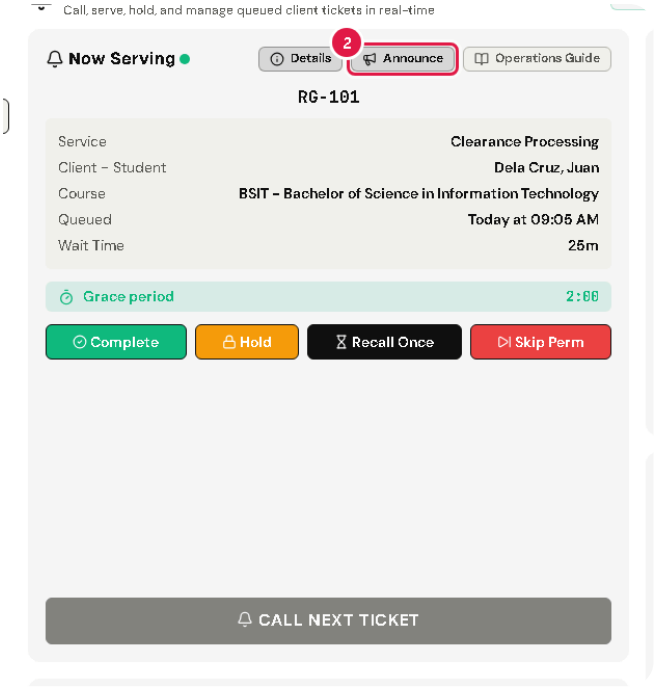
- The client's ticket is under **Now Serving**.

Steps

1 Watch the **Grace period** timer. It turns to **Grace period expired — No show?** when time is up.

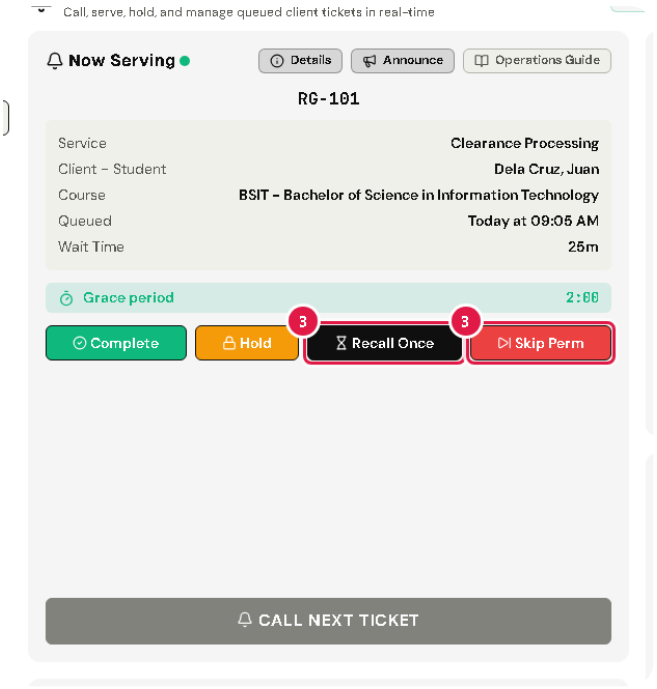


2 To call the same number again on the TV, tap **Announce**, then **Yes, Proceed**.



3 If the client still does not come, choose one:

- **Recall Once**: the ticket goes back to the end of the waiting line. It will be called again later.
- **Skip Perm**: the ticket leaves the line for good. It cannot be called again.



4 Tap **Yes, Proceed** to confirm. You can now call the next client.

> ⚠ **Warning** When the grace period runs out, EZQueue moves the ticket back to the end of the line by itself. This takes up to a minute. It also happens if the client is still at your counter.

If something goes wrong

- **You used Skip Perm by mistake**: there is no undo. The client must get a new ticket.

7 Put a client on hold

Pause a client who needs to step away, then call them back later.

What this is for

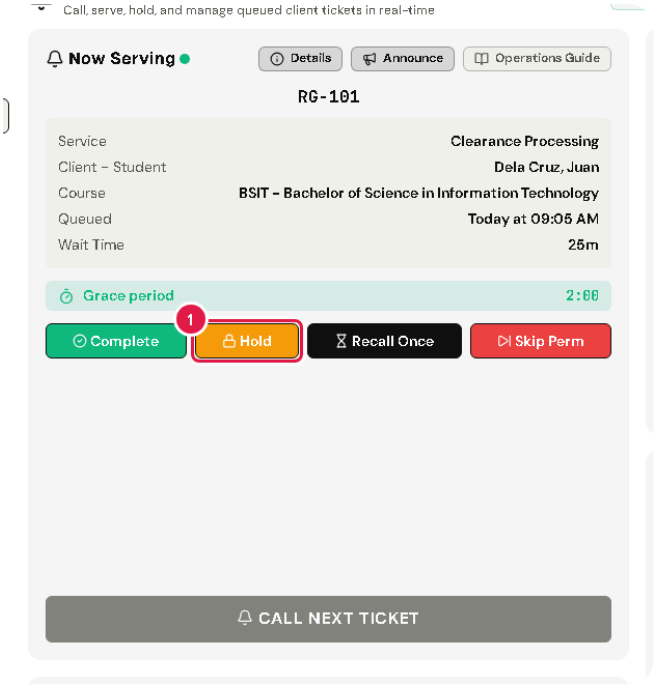
Hold puts a ticket aside without skipping it. Use it when a client must step away and come back. You can serve other clients while the ticket is on hold.

Before you start

- The client's ticket is under **Now Serving**.

Steps

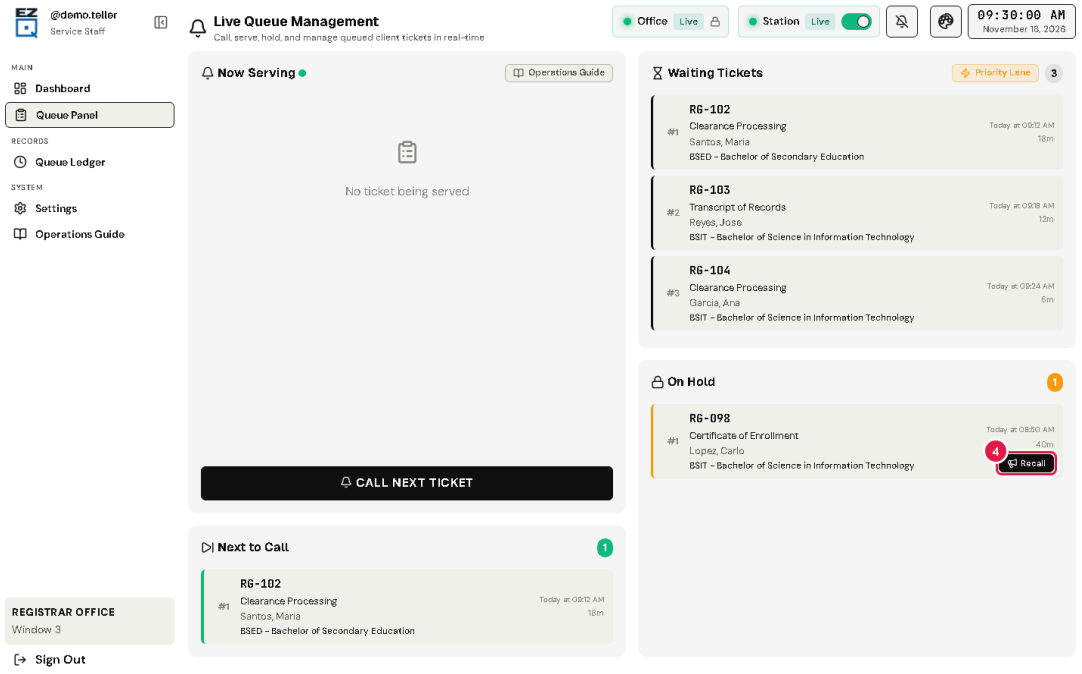
1 Tap **Hold**, then **Yes, Proceed**.



2 The ticket moves to the **On Hold** list on the right. You can now call the next client.

3 When the client comes back, finish the client you are serving first.

4 In **On Hold**, find their ticket and tap **Recall**. Then tap **Yes, Proceed**.



5 The ticket is back under **Now Serving**.

If something goes wrong

- **Recall is grey**: you are still serving someone. Finish that client first.

8 Finish serving a client

Mark the ticket as done when you have helped the client.

What this is for

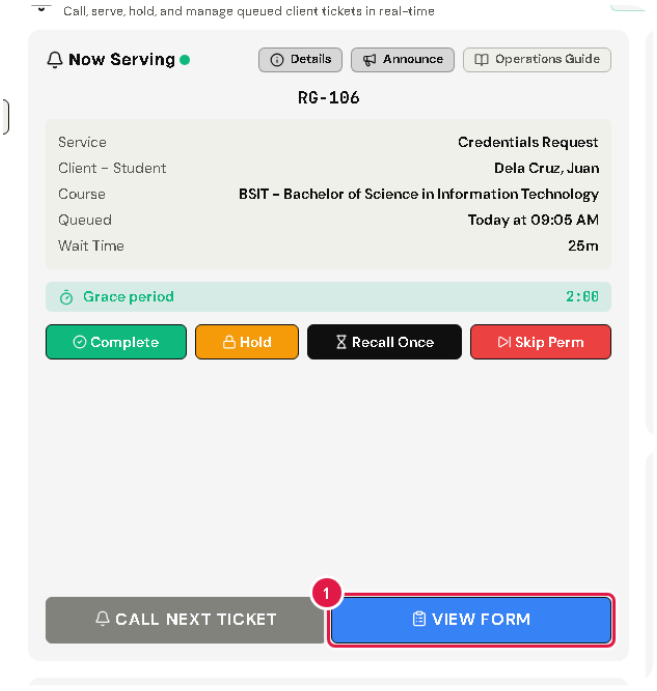
When you finish helping a client, mark the ticket as complete. This frees you to call the next client and counts toward your work for the day.

Before you start

- The client's ticket is under **Now Serving**.

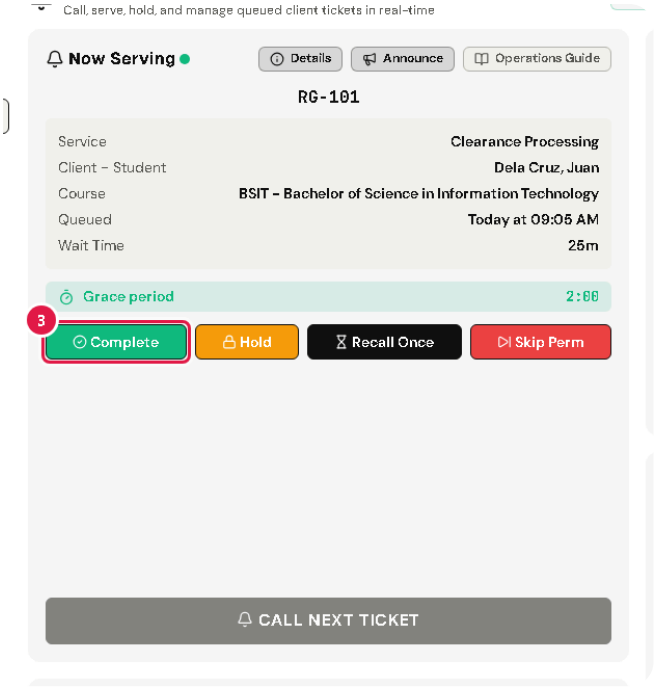
Steps

1 Some services have a form the client filled in. If you see **VIEW FORM**, tap it to read the form. To print it, tap **Open in new tab or window**.



2 Help the client with their request.

3 Tap **Complete**.



4 Tap **Yes, Proceed**. **Now Serving** is empty again.

5 Call the next client (see **Call the next client**).

If something goes wrong

- **"Error" message after tapping Yes, Proceed**: check your internet connection, then try again. If it keeps happening, tell your office admin.

9 Serve priority clients

Handle seniors, PWDs and pregnant clients, and fix a wrong priority.

What this is for

Priority clients, like seniors, persons with disability (PWD) and pregnant women, are moved ahead in line. Their ticket shows a **PRIORITY** label.

Before you start

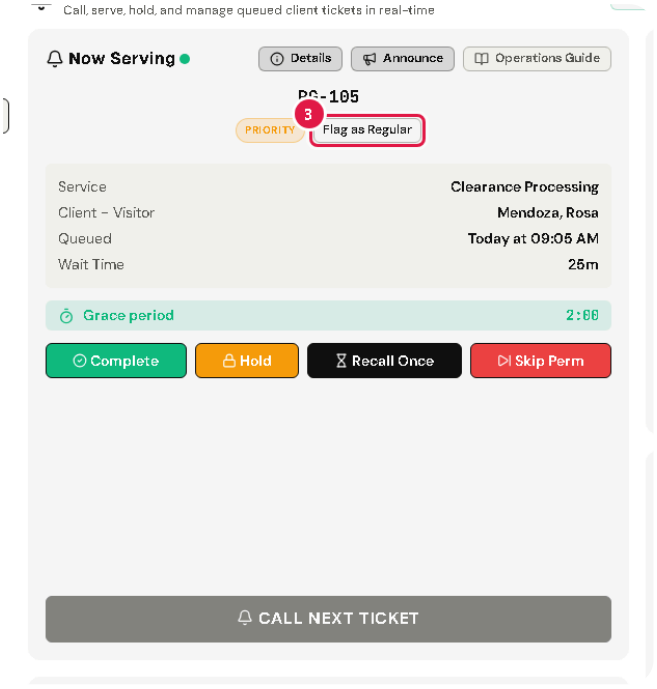
- You are on the **Queue Panel**.

Steps: change a priority ticket to regular

1. A priority ticket under **Now Serving** shows the **PRIORITY** label.

2. Follow your office's rules to check that the client is a priority client.

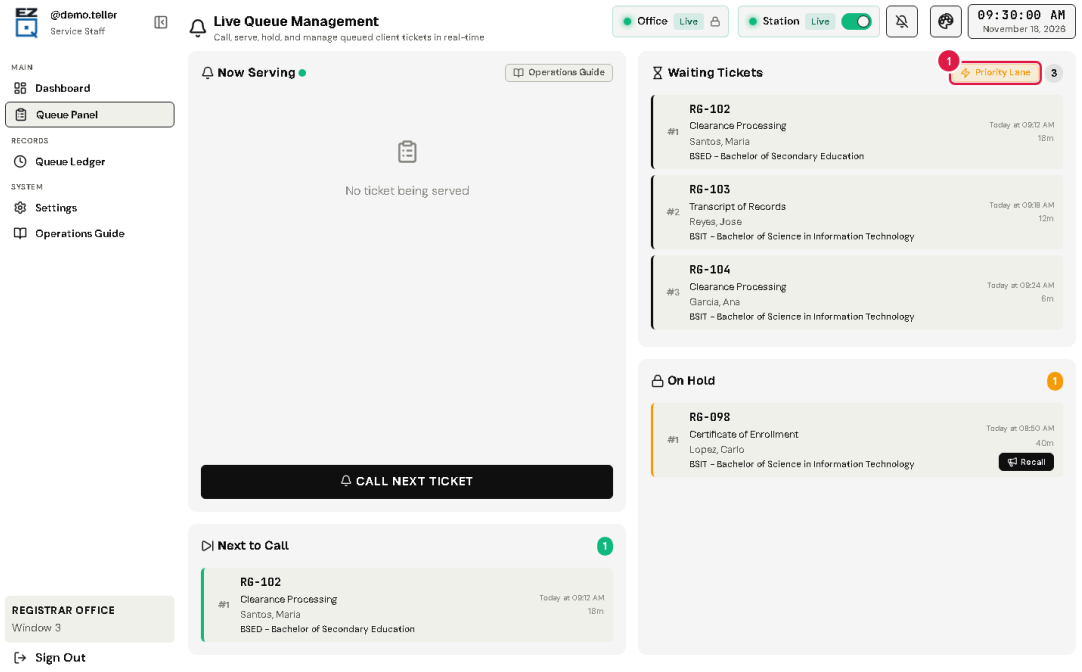
3. If the ticket should not be priority, tap **Flag as Regular**, then **Yes, Proceed**. The ticket becomes a regular ticket.



Steps: register a priority client at your counter

Some offices turn on the **Priority Lane**. It lets you make a ticket for a priority client who comes straight to you.

1. In **Waiting Tickets**, tap **Priority Lane**.



2. A window called **Priority Lane Intake** opens. Fill in each step with the client, like at the kiosk.

3. The new ticket goes near the front of your line.

If something goes wrong

- **No Priority Lane button**: it shows only on a station set as a **Priority Lane** station, when priority is turned on for your office. Ask your office admin.

10 Find a past ticket

Look up tickets you already served, and save or print a list.

What this is for

The **Queue Ledger** is the history of tickets: completed tickets and other records you can search and export.

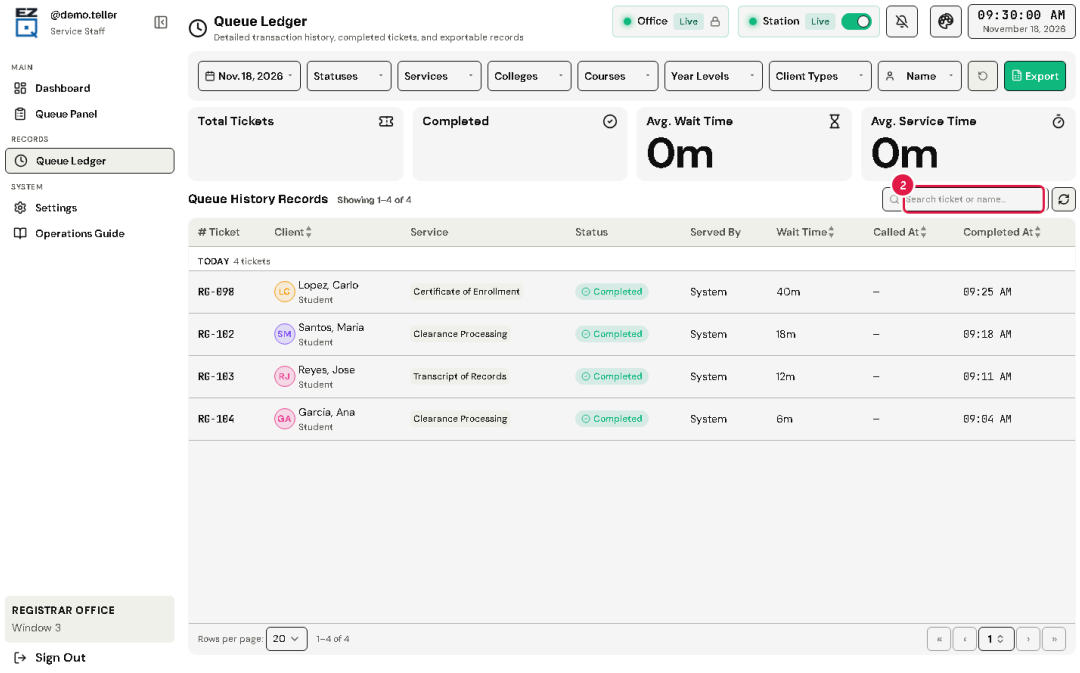
Before you start

- You are signed in.

Steps

1 Tap **Queue Ledger** in the left menu.

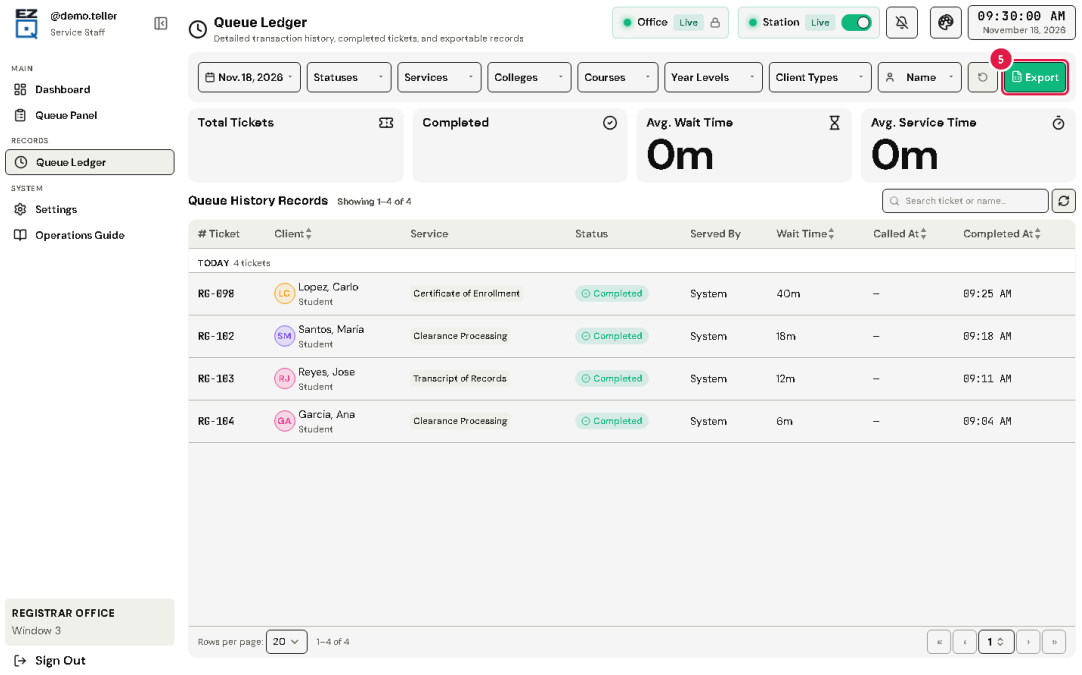
2 Type a ticket number or a name in **Search ticket or name…**.



3 To see one day or a few days, choose the dates at the top.

4. Tap a ticket in the list to see its details.

5. To save or print the list, tap **Export**. A preview opens, where you can download it as a PDF or print it.



> **Tip** Tap the round arrow button to clear all filters and start again.

If something goes wrong

- **The list is empty**: check the dates. Clear the search box.

11 Scan a client's ticket

Use the desk scanner to find a client's ticket fast.

What this is for

If your counter has a barcode scanner, you can scan the QR code on a client's ticket. EZQueue then shows that ticket.

Before you start

- A scanner is plugged into your computer.
- The **Queue Panel** is open.

Steps

1. Ask the client for their printed ticket or the ticket on their phone.
2. Point the scanner at the QR code and press its button.
3. If the ticket is in your line, its details open.
4. Read the message at the corner of the screen. It says if the ticket is being served, waiting, or on hold.

If something goes wrong

- **"Ticket Not in Queue"**: the ticket is not waiting, on hold or being served at your office. Look it up in the **Queue Ledger**.