4.11 Customer Queue (check in/out)

**Understanding the Basics:**

“Who’s next?” The customer queue is a line up for who needs to be serviced next. If you deal with an industry that has a waiting room or a waiting process and need some kind of ordering, the customer queue is a great tool for servicing time sensitive, independent interactions.

The customer queue can be tied to customers, used generically with notes for reference, or as a plain numbering system. Custom name your queue and use it to suit your needs. The customer queue is turned on or off in the corp wide settings. Once the queue is working there are many links and ways to add customers to the queue and a queue icon in the top right corner of every page for quick access from anywhere in adilas.

**Getting Started:**

After your customer queue is turned on by an administrator (which is done in the settings section) the customer queue can be accessed a number of ways. You can link directly from the queue icon in the top right corner of every page and search for a customer from the queue page or add generic customers. If you search for your customer first there is a link on returned customer searches to add directly to the queue. If you go to the customer’s log page there is also an easy button to add the customer to the queue.

**Suggested Permissions:**

**Permissions:**

Turn on the customer queue in the corp-wide settings. This is also where you can name your customer queue. Once on, you can use the customer queue with the basic customer permissions turned on.

**Basic Use:**

System Search Section: “Customer” – this permission populates your quick search with the customer option. This is one of the best tools for quickly searching customers and quickly getting to customer information from any page in adilas. The user must also have at least the “Add/Edit Customer” permission to use the customer quick search function.

System Basics Section: “Customer Logs” – this permission provides a quick link to search the customer logs section.

System Maintenance Section: “Add/Edit Customer” – this permission is required for 3 main customer functions. First it allows the user to add/edit any customers, customer information, log files, follow-up records, and customer images/scans (if user has photo management permission). It is required to create “customer” invoices, quotes and shopping cart function for basic customer sales. If your corporation uses the queue, this permission is also required for a user to queue a customer.

**Admin Use:**

System Maintenance Section: “Customer Admin” – as the admin permission for customers, this allows the user to manage customer types, credit limits, exporting customer data to Excel and other settings.

**Settings:**

The Customer Queue can be turned on and renamed by editing your corp-wide settings. Get to your “Manage Corporation Info and Permissions” page, accessible from any homepage when you have the administrative “Mange Corp Info & Permissions” permission. Click the “[edit corp-wide settings & defaults link]”. On you corporation settings and defaults page, the Customer Queue setting is with the other customer settings, currently near the beginning. Choose to “Show/Use” your queue here, also rename your queue as you desire and set the auto clean up times.

See the Admin section of the User Guide if more instruction is needed on how to access these administrative pages.

**Related Pages & Help File Links:**

Customer Queue: This page is where you manage your customer queue. You can search for customers to add to the queue, add generic non-customers to the queue (it can be helpful to add notes to reference these customers), and overall search and manage your customer queue.

<https://www.adilas.biz/top_secret/help.cfm?id=400&pwd=queue>

**Additional Content:**

-Show what the customer queue icon looks like & the customer queue page.