Handoff Queue

Staff guide: answering the customers our chatbot hands over

Open it at **queue.stluciahelicopters.com**
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Quick version

1. Open a conversation and click **Assign to me**.
2. Customer active? **Send in chat**. Likely offline? **Email customer**.
3. Note what you told them, then **mark it resolved**.

There is also a 2-minute video, and this guide is always available under **Help** in the queue.

Screenshots use sample data: the names, tickets and emails shown are made up.

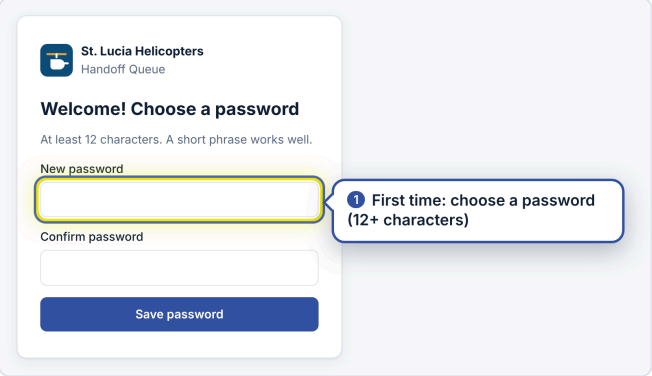
1. What the queue is

When our website chatbot can't answer a customer, it hands the conversation to a person. Every one of those handoffs lands in the Handoff Queue, so nothing is missed and we can see who answered what.

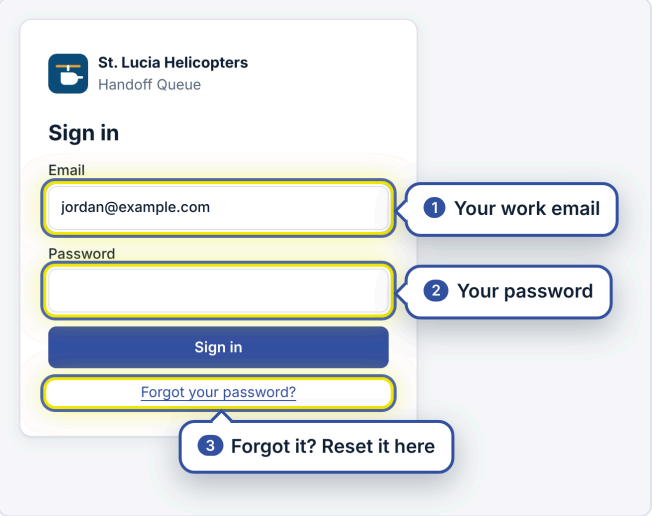
You don't need to open OpenCX. Everything is done from the queue.

2. Signing in

1. **First time:** open the invite email and click the link. Choose a password of at least 12 characters. A short phrase works well.
2. **After that:** go to queue.stluciahelicopters.com and sign in with your work email and password.
3. **Forgot it?** Click *Forgot your password?* and follow the emailed link.

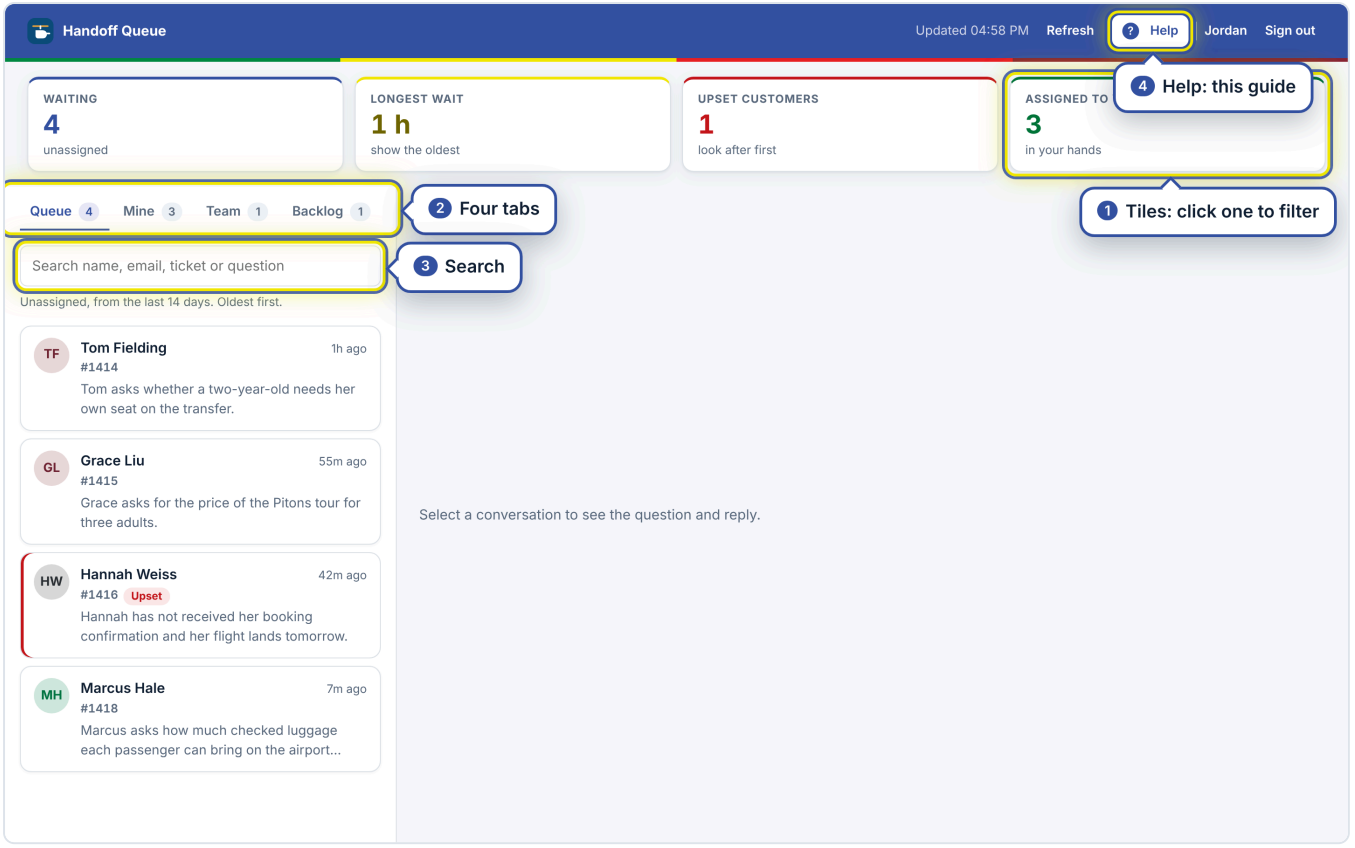


First time: the invite link opens this page.



Every time after that: sign in with your work email.

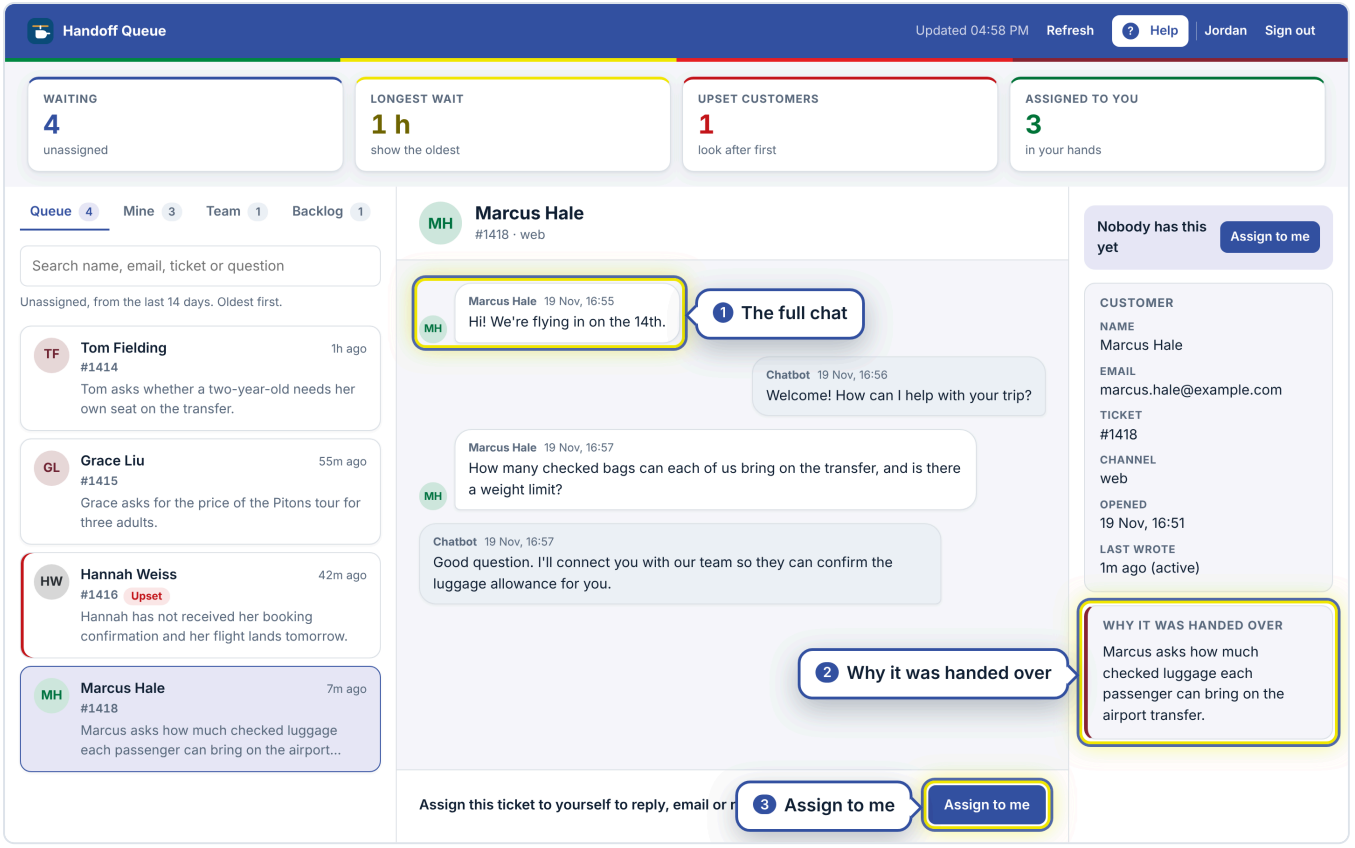
3. The screen



1. **Tiles:** *Waiting* (nobody has it yet), *Longest wait*, *Upset customers* (handle these first) and *Assigned to you*. Click a tile to filter; click it again to clear.
2. **Tabs:**
   - *Queue*: new and unassigned, from the last 14 days, oldest first.
   - *Mine*: assigned to you.
   - *Team*: someone else is handling it.
   - *Backlog*: unassigned and older than 14 days.
3. **Search** by name, email, ticket number or question.
4. **Help** opens this guide inside the queue.

The queue refreshes itself every minute. *Refresh* updates it now.

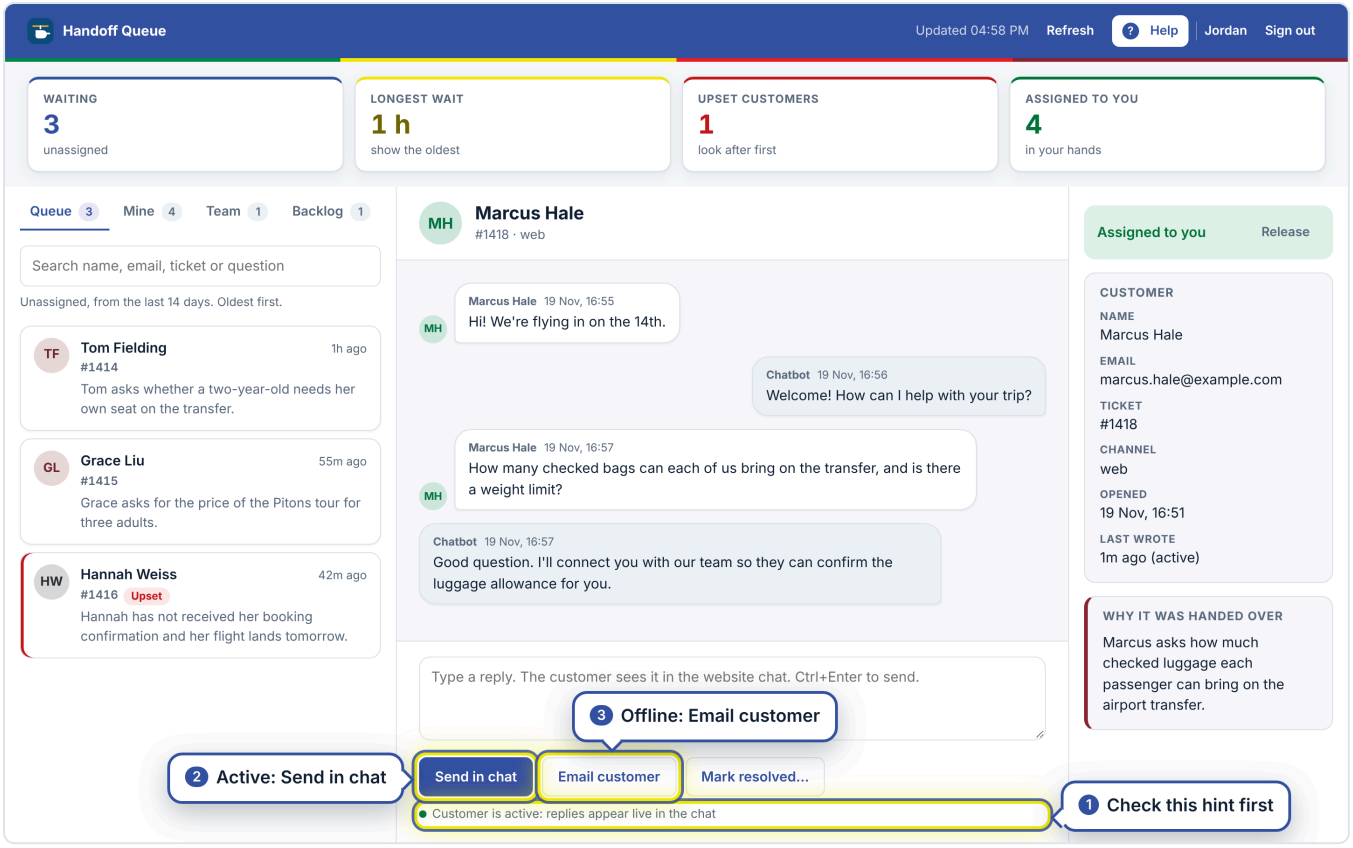
4. Taking a ticket



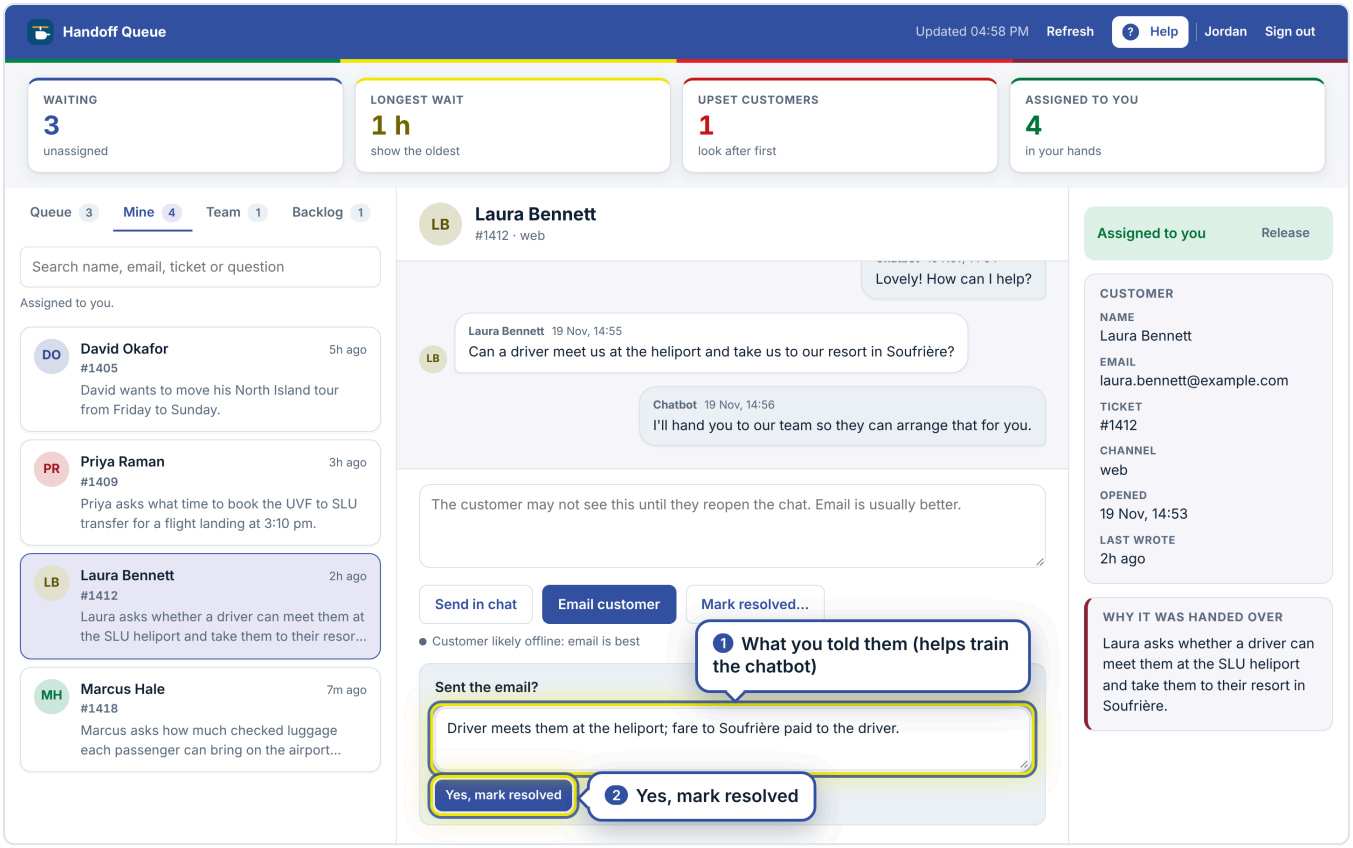
1. Click a conversation to open it. You'll see the full chat.
2. On the right: the customer's details and *Why it was handed over*.
3. Click **Assign to me**. It moves to your *Mine* tab so nobody else picks it up.

Customers marked **Upset** should be answered first.

5. Replying: chat or email



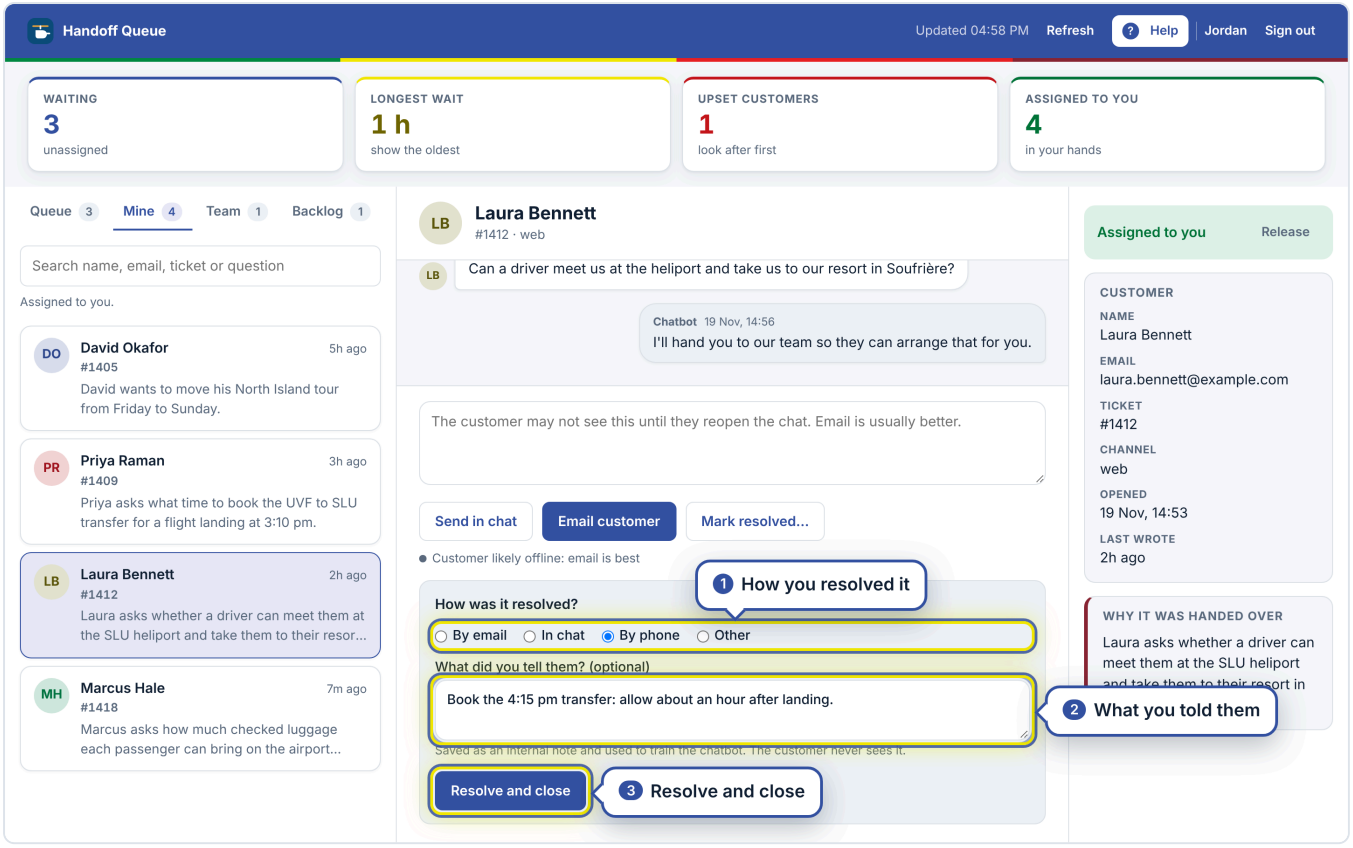
1. **Check the hint** under the reply box first.
2. **Customer is active:** type your answer and click **Send in chat**. It appears live in the website chat. `Ctrl`+`Enter` also sends.
3. **Customer likely offline:** click **Email customer**. Your mail app opens with their address, the ticket number and their question filled in. Write your answer and send it.



After emailing: note what you told them, then click Yes, mark resolved.

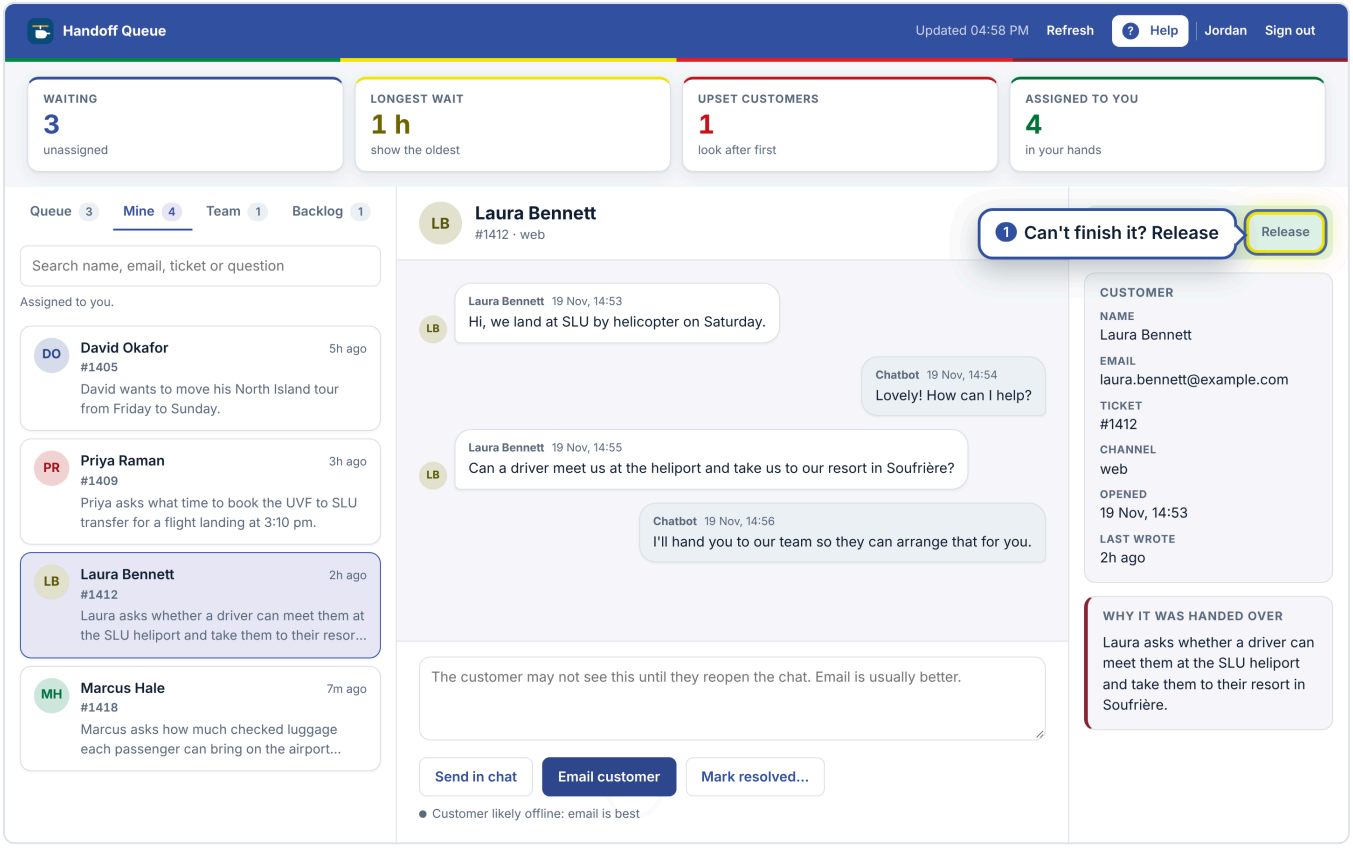
Back in the queue it asks *Sent the email?* Add a line about what you told the customer. It helps us train the chatbot so it can answer this next time. Then click **Yes, mark resolved**.

6. Resolving



1. Click **Mark resolved...**
2. Choose how: *By email*, *In chat*, *By phone* or *Other*.
3. Under *What did you tell them?* add a line or two. It's saved as an internal note and used to improve the chatbot. The customer never sees it. If you replied in chat you can leave it blank.
4. Click **Resolve and close**. The ticket closes in OpenCX with a record of who handled it.

7. Releasing a ticket



Can't finish one? Click **Release** (top right of the ticket) to send it back to the queue for someone else.

8. Troubleshooting

"Your email is not set up in OpenCX yet"
Sign in once through FareHarbor → Settings → FH Agent, then refresh the queue.

"Your session has ended"
Sign in again. Nothing you assigned is lost.

The invite link says it has expired
Ask Denny to send a new invite.

The email button says "No valid email on file"
Reply in chat, or check the conversation for a phone number.

The mail app doesn't open when I click Email customer
Set a default mail app on your computer (Windows: Settings → Apps → Default apps → Outlook), then try again.

Anything else
Contact Denny Louis, IT & Digital Operations.