

WAITLIST.ME APP PROCEDURE (WALK-IN, PICK-UP/ONLINE, CURBSIDE SERVICES)



To manage lines outside your dispensary, it is important to implement a patient/customer text communication system, via the **Waitlist.Me App (PRO version)** or other similar queuing system. This process will shift customers to wait by their vehicles when they arrive to either pick up an online order or to place a new order, vs. standing in line either outside or inside of the dispensary.

This procedure guide outlines proper usage of the Waitlist.Me app as it applies to the different types of dispensing processes currently in place. In this document, please find the following:

1. **Initial Setup**
2. **How to Use Waitlist.Me**
3. **Different Service Types (Walk-up, Pickup [Online], Curbside)**
4. **Waitlist Me Text Notifications**
5. **Turning Off Data Owl Notifications**

SECTION 1 INITIAL SETUP/PREP

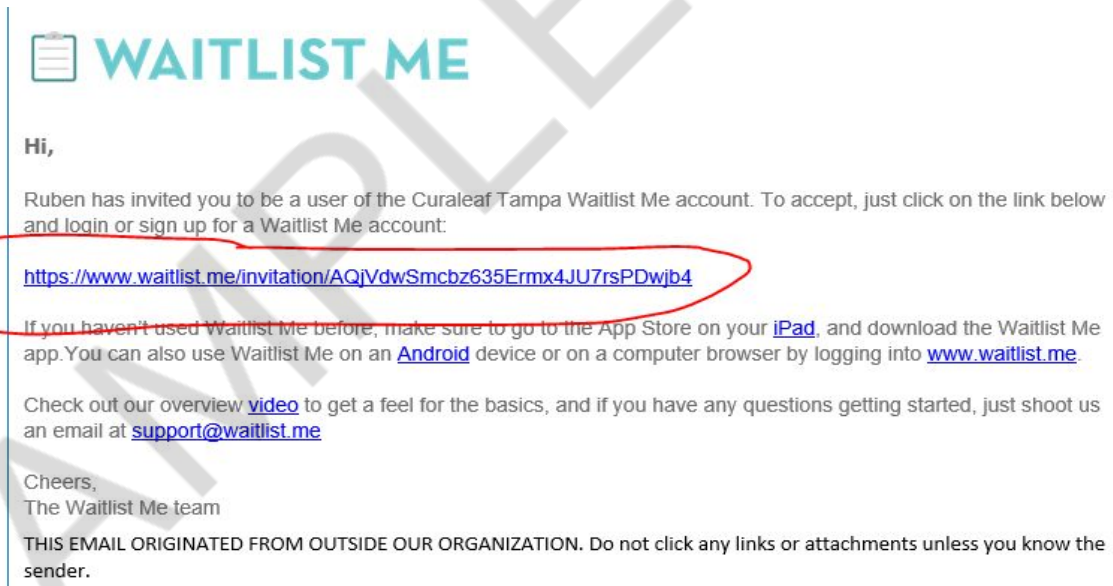
Download the Waitlist.Me app onto your device from the app store. The app is available for iPhone, iPad, and Android devices. Please see the icon on page 1 to ensure you download the correct app.

INSTALL

- ALL Stores on Enterprise Account and Billing Handled by Wakefield Office
 - Consult with Corporate I.T. Team if you previously downloaded app individually
- Desktop Access - <https://www.waitlist.me/>
- Download Waitlist.Me app from the Apple App Store or Google Play Store.

CREATE USER PROFILE

- Click the link (see below) provided in the invitation email sent to your store-specific email by Waitlist.Me on behalf of I.T.



- After clicking the link, you will be routed to a login screen where you will create your profile.
 - Username has already been created for you – store specific email address
 - Use “Curaleaf” for the last name field and the location of your store (i.e. Tampa), for the first name field.
 - Choose a password and then click submit.
 - **REMEMBER TO SAFEGUARD PASSWORD**

CREATE ADDITIONAL USER(S)

- Due to limitations in user permissions, only Administrators can add new users. Please consult with your local I.T. Support team to further assist with creating additional users. Click the link provided in the invitation email sent by Waitlist.Me on behalf of I.T.

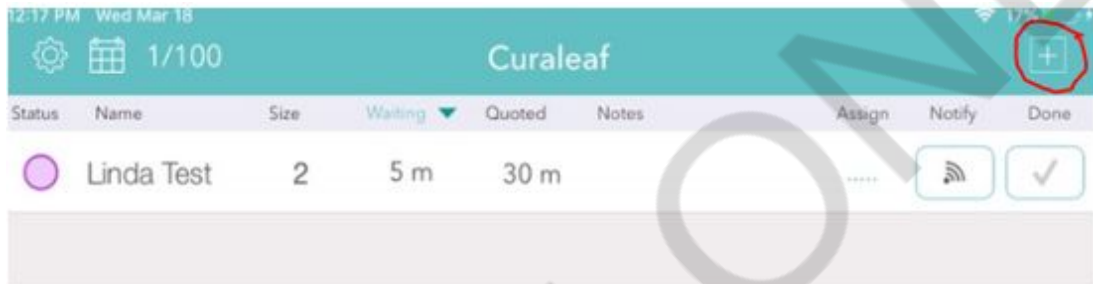
ADD ADDITIONAL LOCATIONS (“MY PLACES”)

SAMPLE ONLY

SECTION 2 HOW TO USE WAITLIST.ME

ADD PATIENT/CUSTOMER

- Click + in top right corner to add a Customer/Patient



- Entering customer information is simple. Below is the default screen of key information, and there are several options to customize needs.
 - When entering a Customer into the queue, ensure proper **HIPAA Compliance [MEDICAL ONLY]** – protect PHI and maintain minimum necessary information requirements
 - Enter First Name, Last Initial, and Phone Numbers only

Cancel **New Party** Add Party

Name Johnson Phone (555) 964-3499

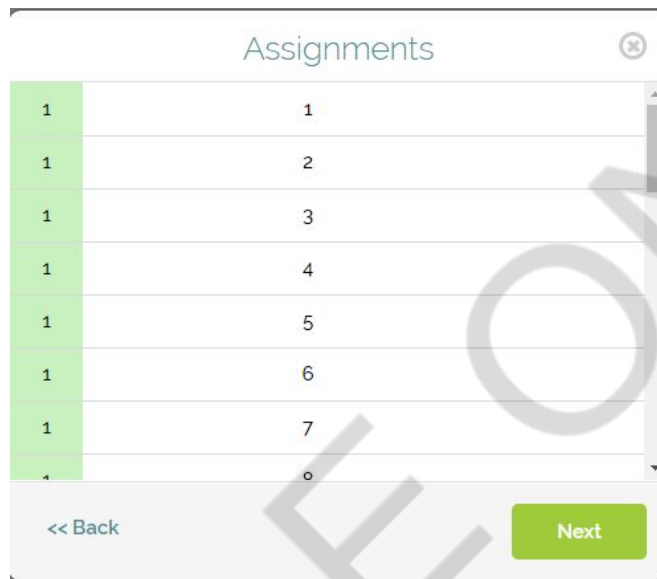
Size 1 2 3 4 5 6 7 8+

Status

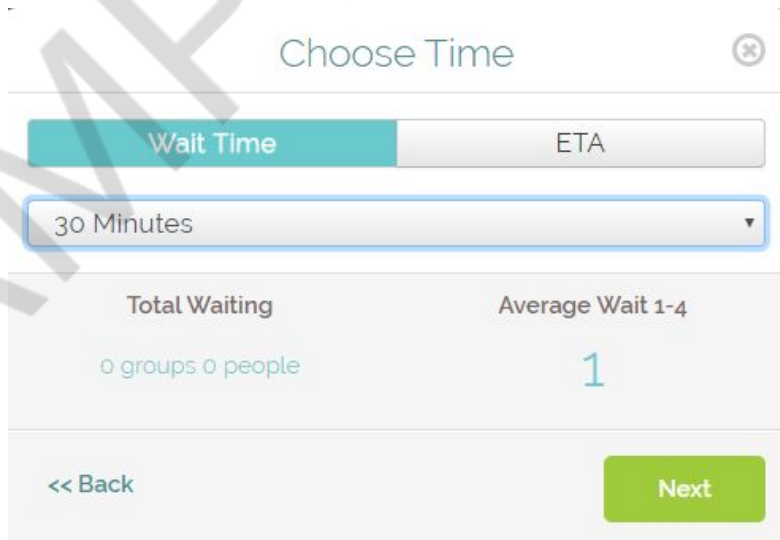
Notes Vegetarian Peanut allergy

Visited 10 times since 3/20/14

- Assignment – you can choose a specific spot in the queue or bypass this field when entering a new party and allow the app to automatically assign the customer in queue.



- Enter anticipated wait time. To be safe, quote 30 minutes and above so customers have an expectation that they will have a wait and don't get upset.



- Stay in communication with reception or a sales lead for true wait time
- Click “Add Party” to complete the waitlist

VIEW QUEUE

- The main waitlist view makes it easy to see how long people have been waiting as well as any notes or colors you have added. Seeing actual wait times next to estimates will help your quote accuracy. Use notes and status colors if needed to help you stay organized, and your main actions of notifying patients/customers are at your fingertips.


Status	Size	Name	Waiting	Quoted	Notes	Notify	Assign	Done
●	4	Heather	46 mins	45 mins	Patio	10:46am paged	22	<input checked="" type="checkbox"/>
●	2	Steve	40 mins	40 mins	Anniversary		7	<input checked="" type="checkbox"/>
●	2	Melanie	26 mins	40 mins			<input checked="" type="checkbox"/>
●	6	Jeff	23 mins	35 mins	High chair		<input checked="" type="checkbox"/>
ETA								
●	12	Charlie		6:30 pm	Birthday party		16	<input checked="" type="checkbox"/>

NOTIFY/TEXTING

- When you are ready for your patient/customer, simply tap the notification button to send them a text. If the patient does not check-in within 5 minutes, you can send them a second text message or call notification.
- Click the “notify” icon, confirm that you would like to send the text
- The customer will receive a text message alerting them that we are ready for them / their order is ready.

Status	Name	Size	Waiting	Quoted	Notes	Assign	Notify	Done
●	Linda Test	2	5 m	30 m		📶	<input checked="" type="checkbox"/>

- Customers and Dispensary Team can communicate back and forth using the Waitlist.Me app. You can do so by clicking the customer’s name in the waitlist.

Customer Visit 

Waited: 3 minutes Quoted: 5 minutes

[Respond](#)

12:56 PM **Text reply - "Yes I will be in at 3PM"**

12:56 PM **Sent text: "We are Sorry to hear that! Can we re-schedule you?"**

12:55 PM **Text reply - "Sorry I need to cancel"**

12:55 PM Sent Text Notification

12:55 PM Added to the Waitlist

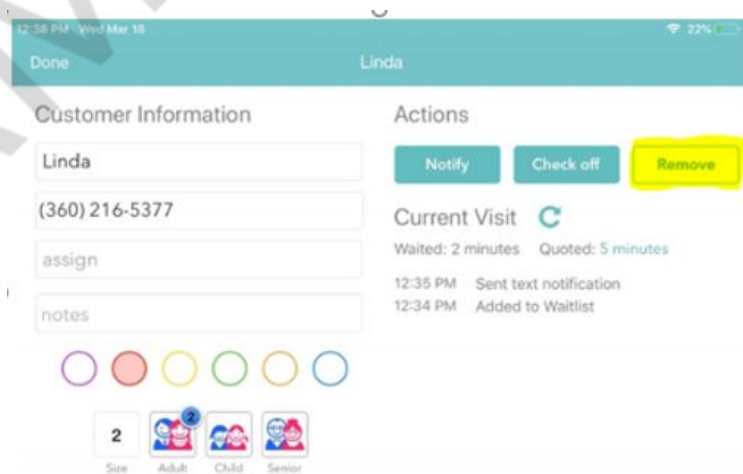
QUEUE MANAGEMENT

- When the customer takes their spot in line, click the check mark and note "Done"



Status	Name	Size	Waiting	Quoted	Notes	Assign	Notify	Done
	Linda Test	2	5 m	30 m			

- To Remove customers from the queue, click the customer name then click "remove"



12:38 PM Wed Mar 18 Done Linda

Customer Information

Linda


(360) 216-5377

assign

notes

Actions




[Notify](#) [Check off](#) [Remove](#)

Current Visit 

Waited: 2 minutes Quoted: 5 minutes

12:35 PM Sent text notification

12:34 PM Added to Waitlist

Size: 2   

SECTION 3 DIFFERENT SERVICE TYPES

WALK-UP SERVICE

WITHOUT CURBSIDE:

- Patients/Customers will check in with an associate/security guard handling the Waitlist.Me app on their iPad
 - Customers will then receive the **Confirmation Text Message** (See Below, Section #4)
- Customers will then be asked to wait by their vehicles until they receive the **Notification Text Message** (See Below, Section #4) alerting them we are ready for them
 - Customers will need to reply to this text with their estimated arrival time. They will have a grace period of 15 minutes from the time chosen
 - Customers will then be permitted into the dispensary to place their walk-up order with the associates (maintaining a **1:1 Ratio** in Dispensary)

WITH CURBSIDE (IF APPLICABLE):

- Patients/Customers will check in with an associate/security guard handling the waitlist.me app on their iPad
 - Customers will then receive the **Confirmation Text Message** (See Below, Section #4)
- Customer will place their order with the associate outside the dispensary while remaining in vehicle
 - The associate will write down the order and hand it to a runner to take inside the dispensary to pull the inventory and package it for the customer
 - Printed menus with current inventory should be available for customers
 - The customer will be asked to return to the dispensary when they receive the **Notification Text Message** (See Below, Section #4) alerting them their order is ready. Provide the customer with an ETA their order will be ready
 - Customers will need to reply to this text with their estimated arrival time. They will have a grace period of 15 minutes from the time chosen
 - Once the customer returns to the dispensary in their allotted window, a runner will retrieve the order, and payment will be processed as outlined below in Subsection: **CURBSIDE PICKUP (see below)**
- **Customers should remain in their vehicle AT ALL TIMES.**

PICK-UP ORDERS (ONLINE ORDERING)

- Process Online Pick Up Orders in Data Owl like you normally would.

- Notifications from Data Owl will be disabled and we will move to communicating with Patients/Customers via the Waitlist.Me app only (see Section #5)
 - Once order is prepared and ready for pickup – **DO NOT Change status** of order in Data Owl to: “READY FOR PICKUP.”
 - Instead, bulk complete the orders after entering customers into Waitlist.Me in effort to bypass the ready for pickup text being sent to customers (See Below, Section #5)
 - Place the customer into the Waitlist app/queue once order is complete. They will receive the **Confirmation Text Message** alerting them they are in queue. From there, an associate will be able to contact the customer directly and set a pickup time, via Waitlist.Me text messaging feature (this is in lieu of using DO Texting).
- Once the order is processed and ready for pickup, the dispensary associate will text the customer (using Waitlist.Me) and let them know their order is ready – they will receive the **Notification Text Message**. From there, the customer will respond via text to confirm what time they will be by to pick up their order – (they will need to arrive within 15 minutes of their chosen arrival time)
- Once customer arrives to dispensary at their chosen arrival time, they will be permitted into the dispensary to pick up order and issue payment with the **1:1 Ratio** being maintained.

CURBSIDE PICK-UP - ONLINE ORDERS (IF APPLICABLE)

- In states where Curbside pickup is approved, the associates and/or security guards will handle the entire pickup and purchase of online orders outside of the dispensary
 - Customers will reply to the dispensary via the Waitlist.Me App after they have received their **Notification Text Message** alerting us of their arrival time.
 - Once Customers arrive at the dispensary, they must text the dispensary using the Waitlist.Me app so we can then run their order out to the curbside for them.
- Dispensary Team are to operate curbside pickup process with at least 2 team members:
 - 1st Associate / security guard must check the patient’s identification, while the 2nd associate receives payment and finalizes the Biotrack order.
 - [Please work with your Compliance and Operations Team to establish what payment options are available to you curbside]
 - Our goal is to push customers into electronic forms of payment

SECTION 4

WAITLIST.ME - CONFIRMATION TEXT(S)

TEXTS

- The confirmation notification goes out when you add a patient/customer to the list that contains their estimated wait time and a link to the public waitlist page.
- **SETUP** – Prior to using Waitlist.Me for the first time, you must ensure that the **Confirmation Text** is turned **ON**

The screenshot displays the 'Confirmation Text' settings page. On the left is a vertical sidebar with icons for PRO, SETTINGS, PLACE, USERS, and a summary of 5 total served and 5 total removed. The main content area is titled 'Confirmation Text' and includes a sub-header: 'Customize the confirmation texts and set whether they automatically are sent to each party or not'. Below this, there are three sections: 1. 'Send confirmation text to customers' with radio buttons for 'On' (selected), 'Off', and 'Ask me'. A 'Toggle to edit separate texts for quoted and ETA times' is also present. 2. 'First Notification Text' with a text input field containing a placeholder message and a 'Reset to Default' link. 3. 'Second Notification Text' with a 'Notify with' section (Text and Call) and a text input field containing a placeholder message and a 'Change' link.

- There is also a variation of this message that goes out when you choose to set an ETA time for a reservation (rather than a quoted wait time).

Confirmation Text

Customize the confirmation texts and set whether they automatically are sent to each party or not

Send confirmation text to customers On Off Ask me

Quoted ETA Toggle to edit separate texts for quoted and ETA times

Your reservation for [size] is confirmed for [eta] at Corner Cafe. Thank you!

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Reset to Default

- There are a few optional variables that allow you to include dynamic content that is specific to the text you are sending:
 - [estimate] – Displays an estimated wait time (i.e. 30 minutes)
 - [eta] – Displays a specific time (i.e. 7:30 pm,)
 - [link] – Shows a unique link to the public waitlist where patient/customer can check their place in line.
 - [size] – 1 For a single patient/customer
 - [assign] – If you assign patient/customer to certain stations, you can use this variable to display the name of the station or resource in the text.

NOTIFICATION TEXT

- This notification text is triggered by pressing the notification icon in the app that lets the guest know you are ready for them.

First Notification Text

We are ready for you at Corner Cafe! Need a few minutes? Text us 2. Decided not to come? Text 3.

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Reset to Default

SECOND NOTIFICATION

- If you need to notify a patient/customer a second time, you can choose to have an automated call go out or a text message. Make edits to the text notification or

Customize Your Phone Message

- Your table is now ready. Please return to the restaurant to be seated. Thank you.
- Your table is now ready. Please check in with the restaurant as soon as possible.
- We are done. Please come by at your convenience.
- Your order is now ready to be picked up.
- It's your turn. Please come back for your appointment.
- We are ready for you. Please come by as soon as possible.
- Your turn is coming up soon. Please check in at the reception area. Thank you.
- Your appointment is now available. Please return to reception and check in. Thank you.

SECTION 5

HOW TO TURN OFF DATA OWL TEXT NOTIFICATIONS

1. Log in to your dispensary's Wordpress backend
2. Click Data Owl Clients >> General
3. Scroll down and you'll find the Disable Text Messages/Emails for Order Status
4. To turn off the automatic texts or emails for your orders just select the option "Do Not Send Text" on each respective order status.
5. For WaitList.Me to work the way we intend, **you must disable the following:**
 - a. "Ready for Pickup" – Text message + Email
 - b. "Order Completed" – Email
6. Don't forget to click "Save all changes" on the bottom of the page to finalize your changes.
7. When ready to re-enable text message notifications, simply return to this page and select "Send text" on the order status then save your changes.

The screenshot shows the 'Data Owl Admin' interface. On the left is a sidebar menu with 'Data Owl Clients' selected and 'General' highlighted. The main content area is titled 'Data Owl Clients' and contains several settings sections. A red box highlights the 'Disable Text Messages/Emails for Order Status' section, which includes the following settings:

- New Order Text Message: Do Not Send Text
- Ready for Pickup Text Message: Do Not Send Text
- New Order Email: Do Not Send Email
- Ready for Pickup Email: Do Not Send Email
- Order Completed Email: Do Not Send Email

A red arrow points to the 'Save all changes' button located below the highlighted section.