

Team Member Profile

Dashboard

Accessing & viewing team member profile page

A new team member profile is created when a new user is created in the team member app. As soon as a team member signs up, a profile is created.

This page represents how to access team member profiles

A team member profile can be accessed in 2 ways:

1. Through the team member page in the dashboard
2. Through the job profile of an appointment they are on

This flow represents option #1. The team member page in the dashboard shows a list of team members in alphabetical order.

This list can be filtered by:

- Position
 - Crew
 - Chief
 - Captain
- City
 - Locations
- Hours
 - 0-50
 - 51-100
 - 101-150
 - 151-200
 - 201-250
 - 251-300
- Earnings
 - \$0-\$250
 - \$251-500
 - \$\$500-\$1000
- Rating
- Start Date
- Status

+ New Appointment

New Tasks

Notifications

Calendars

Members

Customers

Locations

Reporting

Real-Time Dashboard

Search

Type name here...

Filter By

Position

City

Hours

Earnings

Rating

Start Date

Status

TE by Date

First Name
Last Name

Start Date

Position


City

Hours Worked

Total Earnings

Overall Rating

Phone #



Corey Hall

5/1/17

Chief Starter

Pittsburgh

234

\$4,212

4.8

412-267-6654

Accessing & viewing team member profile page (cont'd)

- Position
- City
- Hours
- Earnings
- Rating
 - Less than 3
 - 3.1- 4
 - 4 - 5
- Start Date
 - Ascending
 - Descending
- Status
 - Trainee
 - Active
 - Inactive

Simply click on the team members name in the row to access their profile.

Rules:

- Most filters can be used in combination with one another.
- Team Member profiles can be exported as a whole or with filters active into csv. File
- Export will contain ALL profile information except individual jobs
- Export will contain a tally of total shifts worked



Team Member Profile

Page - Account Status

This page represents a team members profile page. Here are the guidelines to determining an account status:

- Active means:
- Has created an account within the app
 - Completed Onboarding & is able to take jobs
 - Has logged into or interacted within the app within the past 60 days

- Inactive means
- Has created an account within the app and never complete onboarding
 - Has not logged in or interacted with the app in over 60 days

- Trainee means
- Has created an account an is in the onboarding process

+ New Appointment

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Locations


Open Shifts

Rewards Program

Reporting

Real-Time Dashboard

Member Since
5/17/2017



Last Login: Date, Time

Corry Hall

Chief Starter

Pittsburgh Tapestry

Goals

Interests

Personality Type

Account Status

Activate/Deactivate

Contact

Phone #

412-267-6654

Email

Chall@gmail.com

Upcoming Shifts

+

Shift History

+

Stats

+

Team Member Profile - Elements & Origins

- a. Name
 - i. Gathered from app sign-in
- b. Location
 - i. Based off app sign-in
- c. Tapestry
 - i. Manually entered by admin
- d. Bio
 - i. Generated from interests and goals
- e. Goals
 - i. Provided during onboarding process and updated through app
- f. Personality Type
 - i. Provided during onboarding process
- g. Interests
 - i. Provided during onboarding process
- h. Contact
 - i. Provided during onboarding process
- i. Position & Level
 - i. Updated automatically in app while working and engaging
- j. Upcoming Shifts
 - i. Updated as new shifts accepted
- k. Shift History
 - i. Updated after a completed shift
- l. Stats
 - i. Updated periodically as new relevant stats are accrued.

+ New Appointment

New Tasks

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Member Since
5/17/2017



Last Login: Date,
Time

Upcoming Shifts

Shift History

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Activate/Deactivate

Contact

Phone #

412-267-6654

Email

Chall@gmail.com

END

Team Member Profile

Dashboard

User Authorization

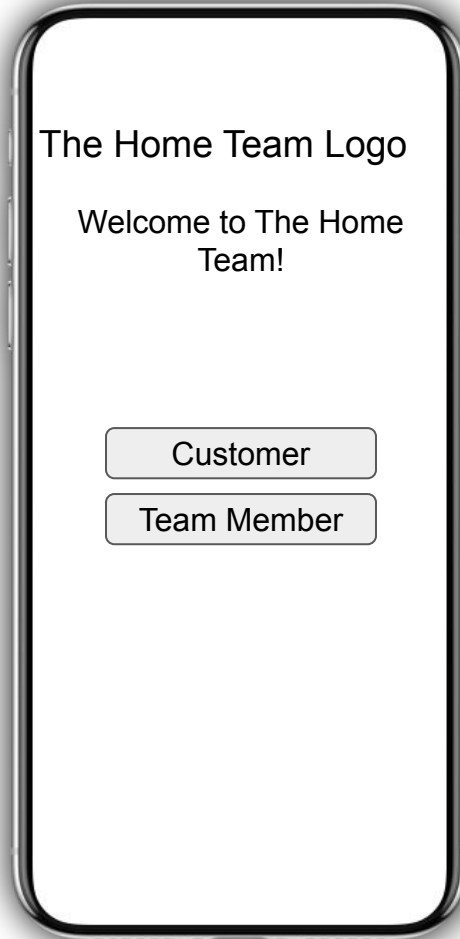
Team Member App

Initial screen when opening app

This is the initial screen shown to a user upon opening the app.

After user identifies as **customer** or **team member**, they will be redirected to the appropriate login screen.

This path will show the **Team Member** authorization process.



Initial login screen for all team members

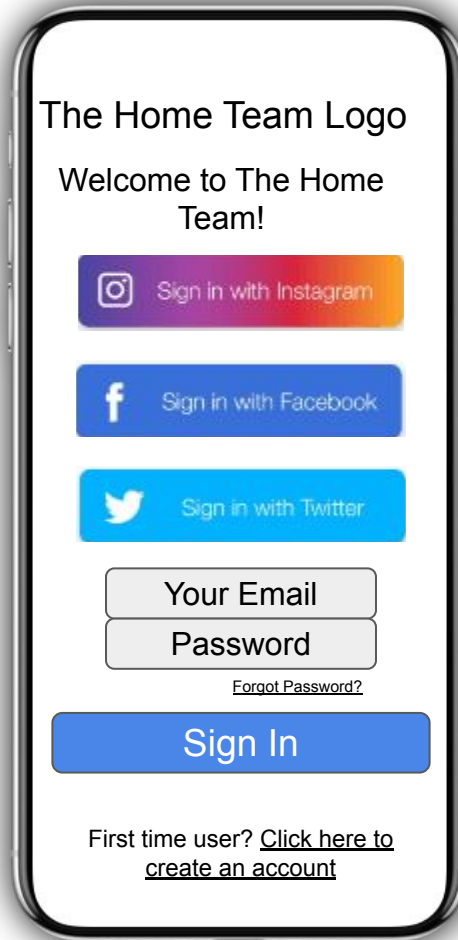
This is the initial screen shown to a user who has selected the **team member** path.

Scenario 1: Existing Team Member

If a team member already has an account they can login using previously selected preferred method

Scenario 2: New Team Member:

If this is a new team member they will go through the general sign-up process.



New Team Member First Time Sign-In

Customer App

General information page and Terms of Service for new user (team member)

This is the screen shown to a new team member who does not have an account.

This page will allow them to enter relevant information to create an account. All information is required.

Rules:

- All required fields must be entered.
- Email must be confirmed on the backend. (no user involvement)
- How did you hear about us options:
 - Instagram
 - Facebook
 - Google
 - Referral
 - On-Campus
 - Other
 - If "referral" is selected, text box opens where they can type persons name and predictive function will pull up relevant names
 - If "other" is selected, text field will open for team member to enter additional option

Please enter the information below

First Name

Last Name

Phone #

Email

DOB

How did you hear about us?

Next

Terms of Service for new user (Team Member)

After team member clicks continue from the previous page, Terms of Service box will appear.

Rules:

- Team member must scroll through 10% of TOS before swipe feature is interactive
- Team member must swipe entire finger from left to right.
- Add an animation once swipe function is complete



Login options for new user (Team Member).

This is the screen shown to a new team member who does not have an account..

This page will allow them to choose how they would like to create an account and log-in..

They can either:

- Login with a social media account
- Create an account with an email and password

IF they choose to create username and password:

Rules:

- Password must be at least 6 characters, be alphanumeric and contain 1 uppercase and 1 lowercase
- Email must be a valid email
- Verify password box does not appear until after password is entered.

Create a username and password or connect social media account

Sign in with Instagram

Sign in with Facebook

Sign in with Twitter

Enter email for username

Create Password

Verify Password

Next

END

User Authorization

Team Member

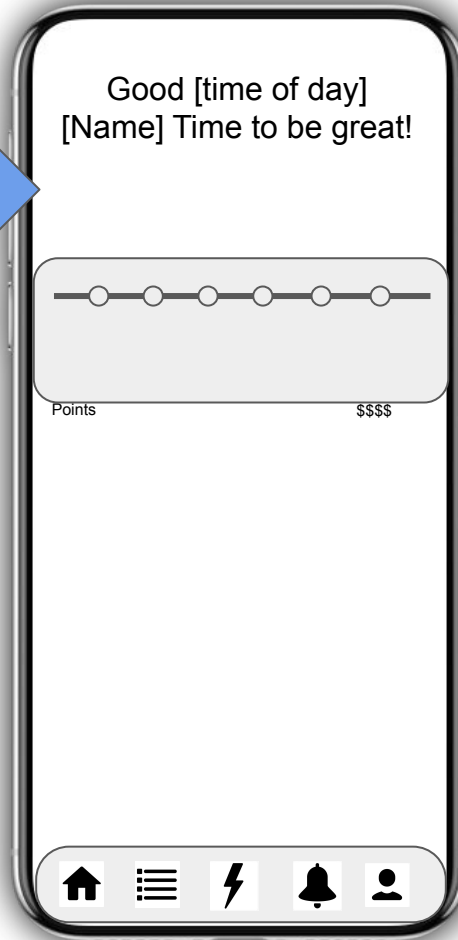
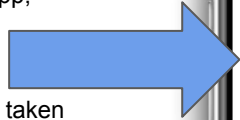
Team Member App Walkthrough

Team Member App

Upcoming Shift Module

In the home screen of the team member app, user will be able to see a module which represents their next upcoming shift.

Upon clicking that module, the user will be taken inside the next upcoming shift where they can view and manage shift details.



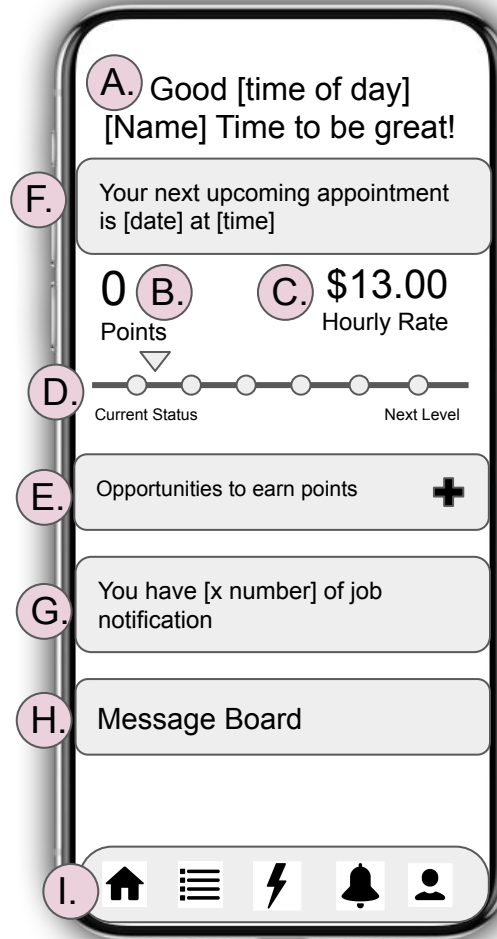
Team Member Home Page

This page represents the homepage for an existing team member.

Elements:

Rules:

- A. Welcome message
 - a. Reflects Team members first name, time of day (morning, afternoon, evening)
- B. Points
 - a. Points are generated by completing tasks which admin will generate on the backend in the dashboard
- C. Hourly Rate
 - a. Hourly increase reflects progress made from point accumulation on the backend by admin in the dashboard
- D. Progress Bar
 - a. Progress bar shows a team where they are in comparison to where they can end up based off of accumulating points



Team Member Home Page (cont'd)

This represents the initial home screen for all users on the team member side.

Elements:

Rules (cont'd):

- A. Welcome message
- B. Points
- C. Discounts
- D. Progress Bar

E. Points & Rewards Program*

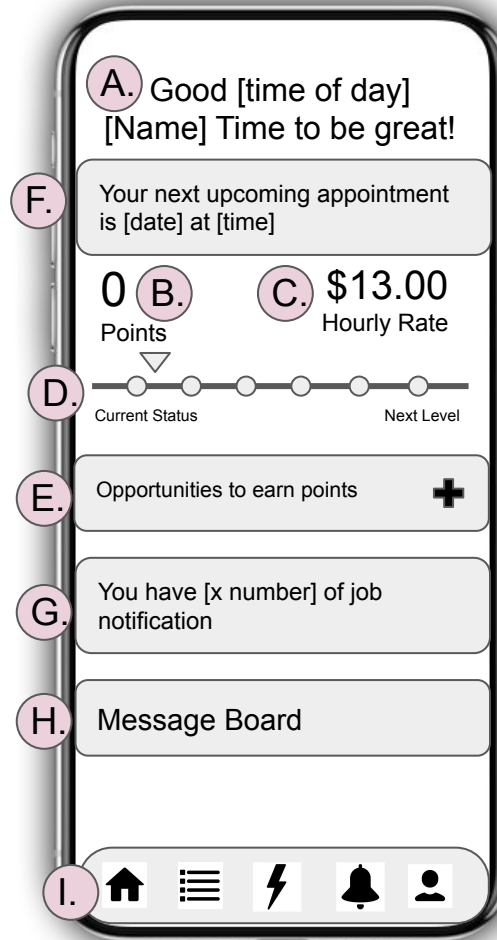
- a. This is an accordion style menu that a team can open and learn about activities they can perform to earn more points. Links to activities will be present in this box and generated by admin in the dashboard

F. Upcoming Appointments*

- a. This will be a clickable element representing the next upcoming shift. Upon clicking it will open up the shift details

G. Notifications*

- a. Anytime an appointment update or request is made team member will receive notification in home page. It will open up a temporary notification page where a team member can view and approve/deny appointment updates.



Team Member Home Page (cont'd)

This represents the initial home screen for all users on the team member side.

Elements:

Rules (cont'd):

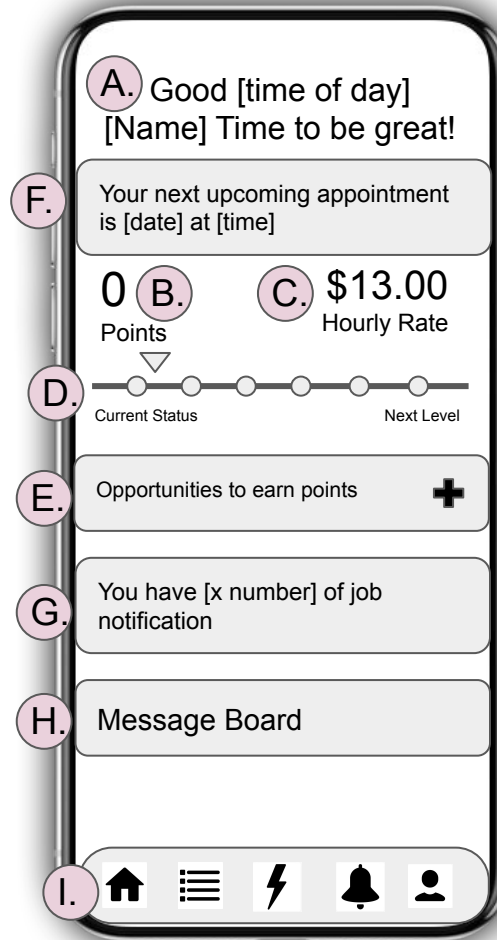
- A. Welcome message
- B. Points
- C. Discounts
- D. Progress Bar
- E. Discount Details
- F. Upcoming Appointments
- G. Notifications

H. Message Board*

- a. These will be messages with links to outside material and resources for customer to check out. Materials will be created and shared within dashboard by admin. Team members will earn points for engaging.

I. Navigation Bar*

- a. The navigation bar will allow user to navigate to different relevant screens throughout the app



Good [time of day]
[Name] Time to be great!

Your next upcoming appointment
is [date] at [time]

0

Points

\$13.00

Hourly Rate



Opportunities to earn points



You have [x number] of job
notification

Message Board





E. Points & Rewards Feature

Team Member App

Points & Rewards program in team member app

This explains and shows the points feature module in the dashboard of the team member app.

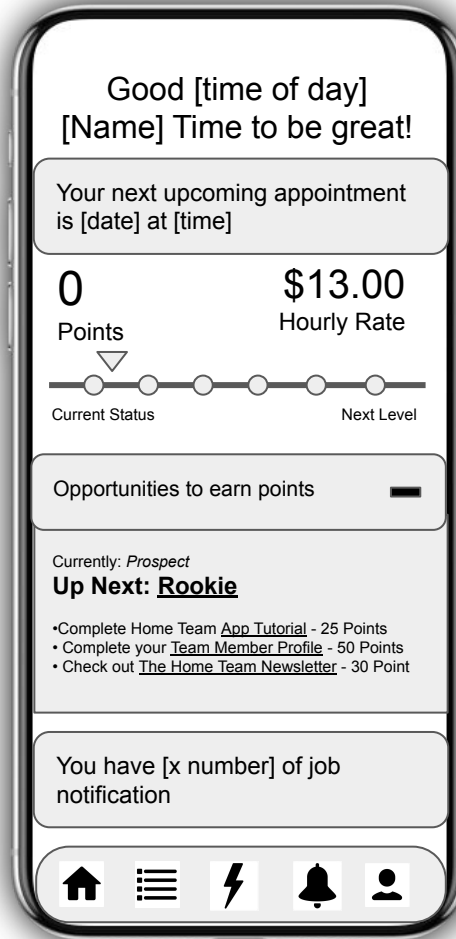
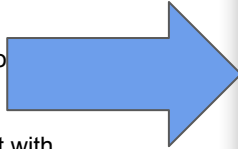
The module is accordion style, so when the plus button is clicked, an accordion style menu opens up revealing current ways a team member can earn more points, as well as what those points will lead to.

They will also be able to see tasks/ points earned over the past 30 days.

Certain initiatives will be in text format with hyperlinks to sources which will enable them to complete certain tasks

Initiatives, and their hyperlinks will be assigned in the dashboard and will be specific to:

- A location
- A certain team member position and/or rank
- An individual

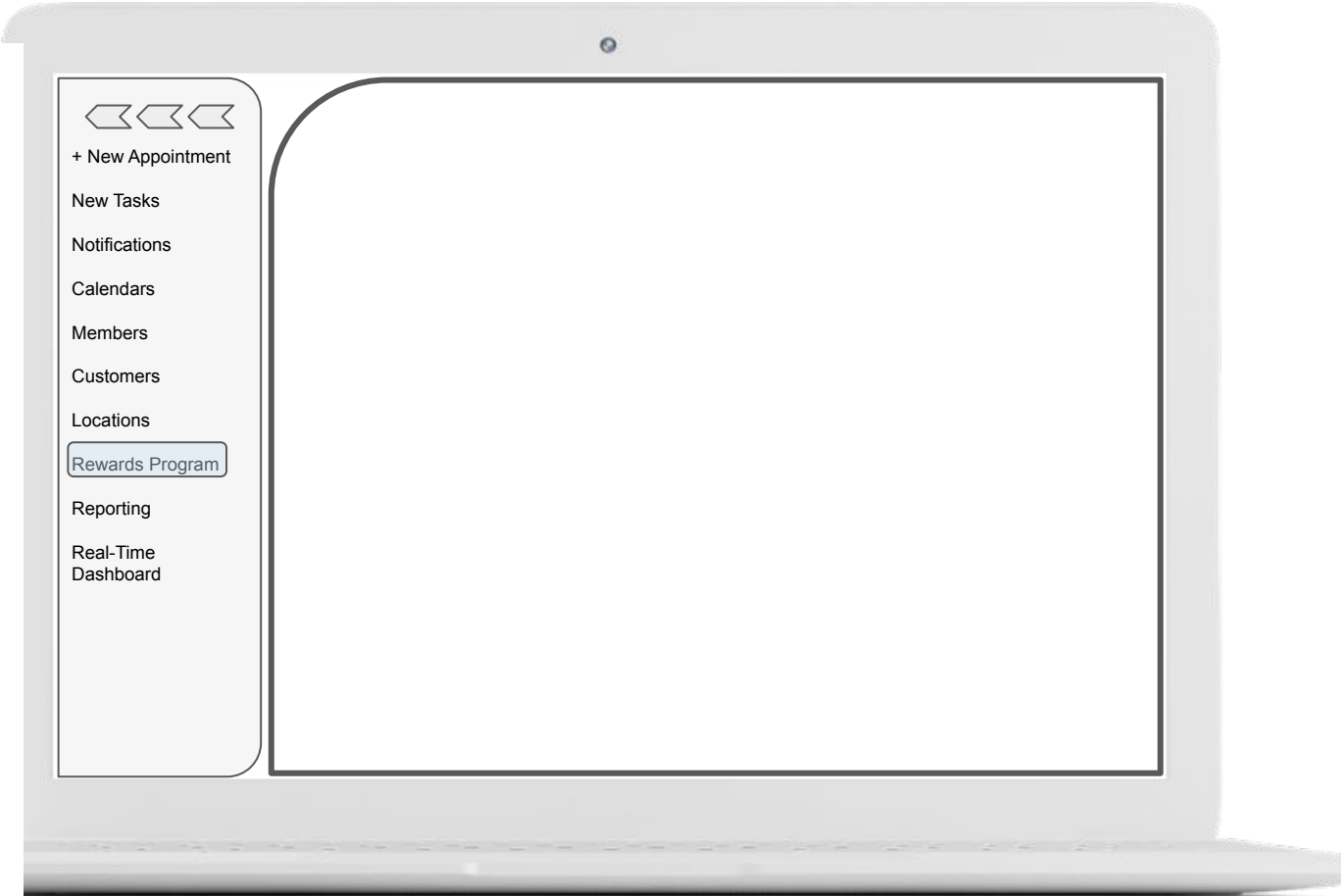


Points & Rewards Program in Dashboard

In Dashboard Admin must be able to create and send out notifications for Points & Rewards program to both customers and team members.

These will be the necessary inputs to create and send a points & rewards program:

- Location
 - Choose which location will receive points and rewards offer
- User Type
 - Customer
 - Team Member
- User Role
 - Customer
 - Active
 - Inactive
 - Incomplete
 - Team Member
 - Prospect
 - Rookie
 - Starter
 - All-Star
 - Veteran
 - Legend
- Points assigned
 - Number of points for offer
- Text
 - What will the offer say in the app
- Hyperlinks
 - Hyperlink (to app or website) to click within app and complete task



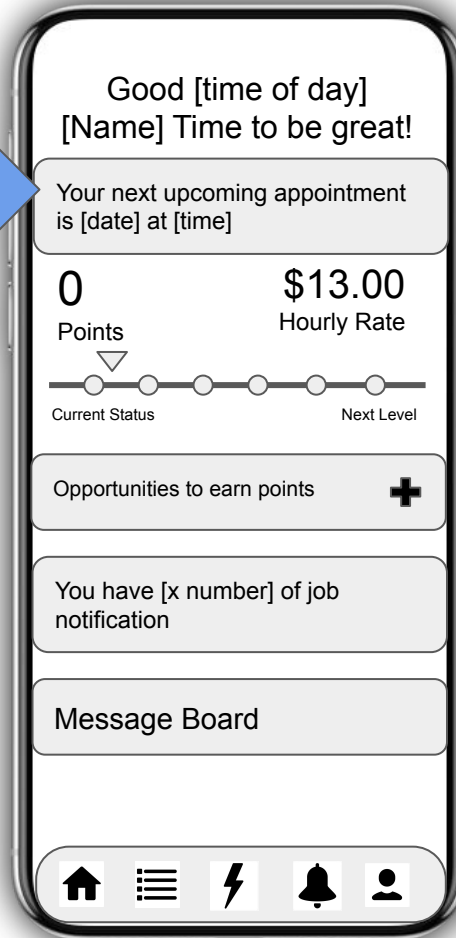
F. Upcoming Appointment Module

Team Member App

Upcoming Shift Module

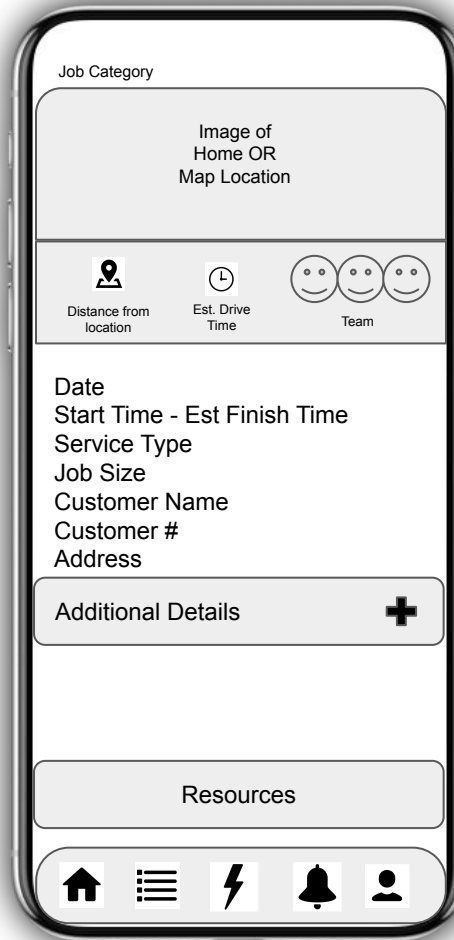
In the home screen of the team member app, user will be able to see a module which represents their next upcoming shift.

Upon clicking that module, the user will be taken inside the next upcoming shift where they can view and manage shift details.



Upcoming Shift Module

Once a user clicks their upcoming shift, it will take them inside of that shift where they can view/edit and update details.

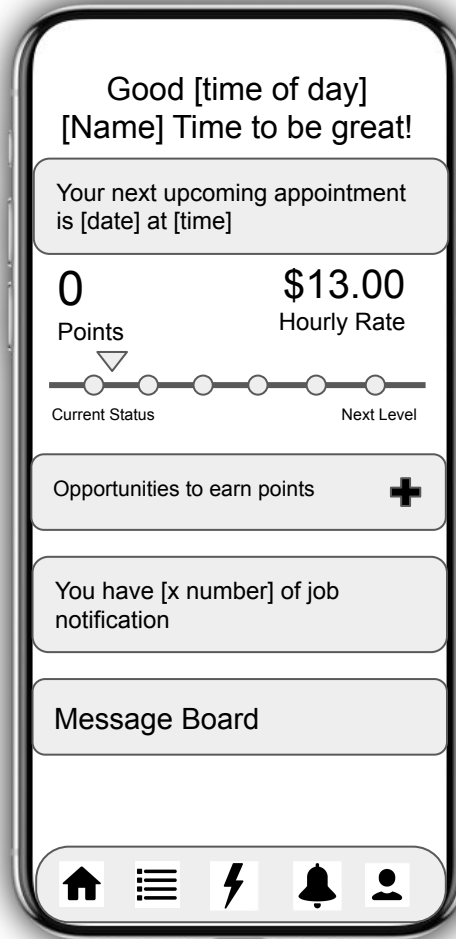
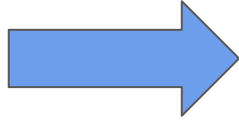


G.Notifications for Upcoming Appointments

Team Member App

Appointment Notifications

Whenever there are relevant appointment updates, a module will appear indicating such to the user. Upon clicking the module user will be taken to the notifications page



Notifications Page

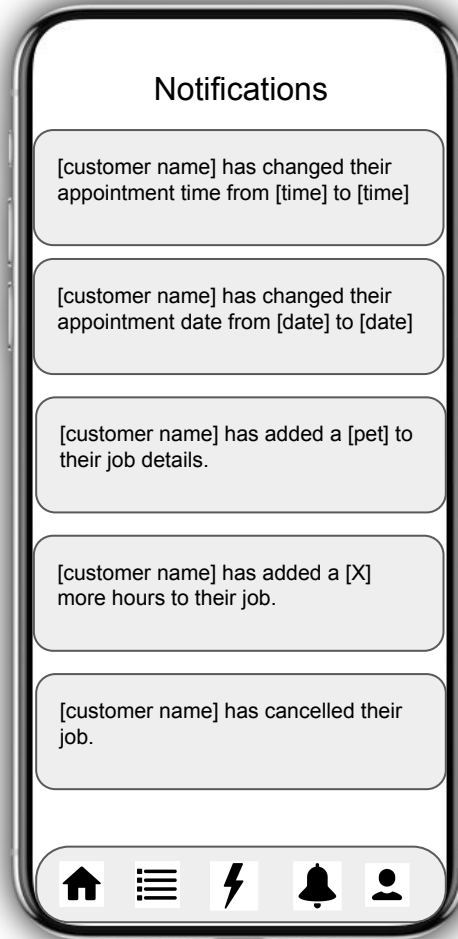
Once a user clicks the notifications module, they will be taken to the notifications page.

Whenever a team member goes into the notifications page, they will see all job updates that they must acknowledge.

They will swipe right to accept changes and swipe left to swap shift

Type of notifications

- Date
- Start Time
- Hours needed
- Pets
- Cancellations



Notifications Page

Once a user clicks the notifications module, they will be taken to the notifications page.

Whenever a team member goes into the notifications page, they will see all job updates that they must acknowledge.

They will swipe right to accept changes and swipe left to swap shift

Type of notifications

- Date
- Start Time
- Hours needed
- Pets
- Cancellations

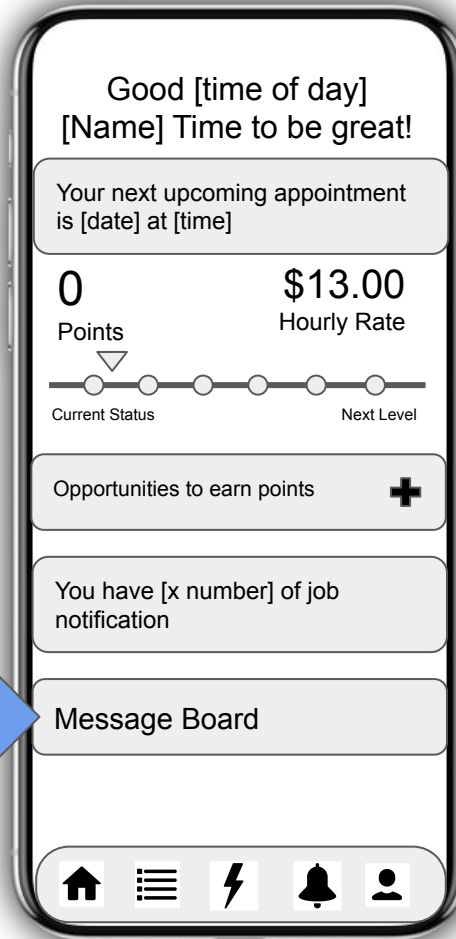
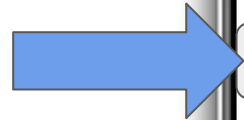


H. Home Team Message Board

Team Member App

Home Team Message Board Module

Admin of The Home Team can send out special messages with links to outside resources where they can access and gain additional points. By clicking the module will open up the specific message



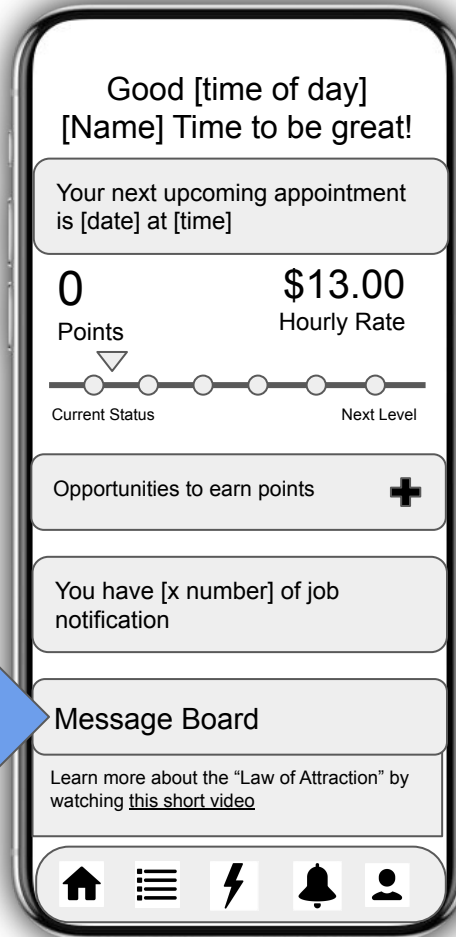
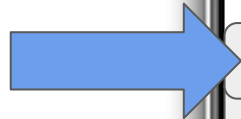
Home Team Message Board Module

The Team Member can access the additional resources through the link found within the message board.

Admin can add messages into the message board from Admin Dashboard.

Rules:

- Choose location
- Choose team member type
- Choose rank
- Type message
- Upload link
- Set time to start and expire



I. Navigation Bar

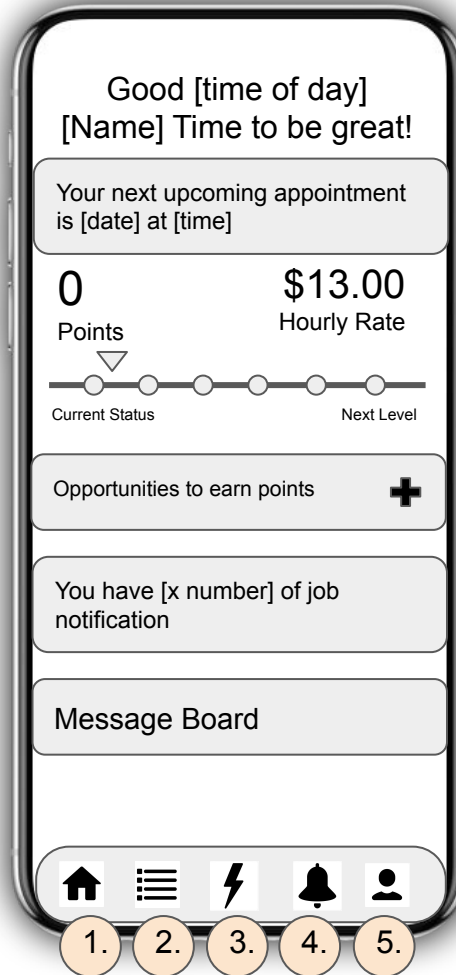
Team Member App

Navigation Bar

The navigation bar is how users will move from page to page throughout the app. The navigation bar consists of 5 components:

1. The Home Screen
2. Shifts
3. Calendar
4. Notifications
5. User Profile

The following slides will show the initial screen for all pages.

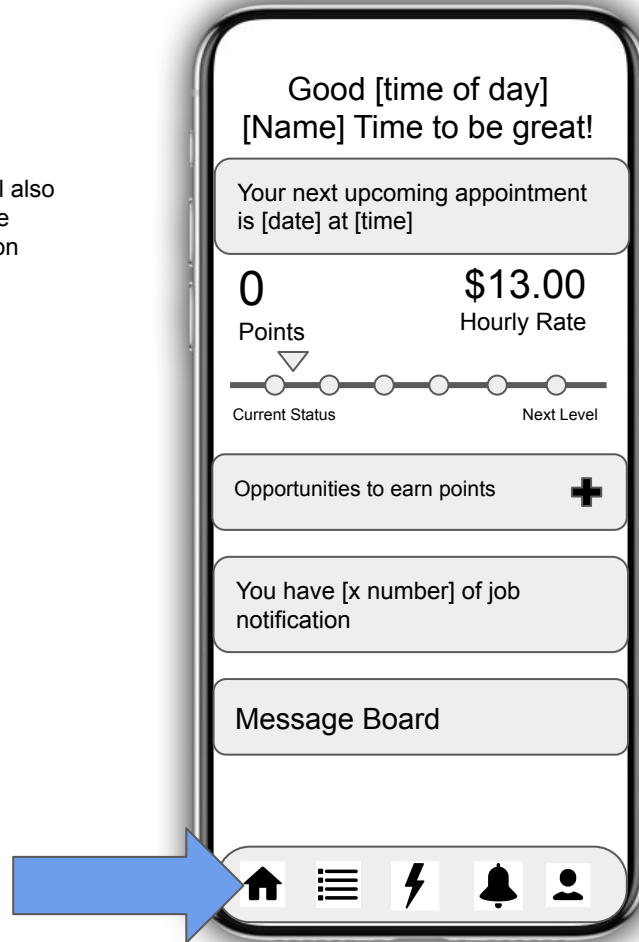


1. Home Page

Customer App

Home Page

This will be the home page of the app. It will also act as a dashboard where users can receive relevant updates/notifications and take action



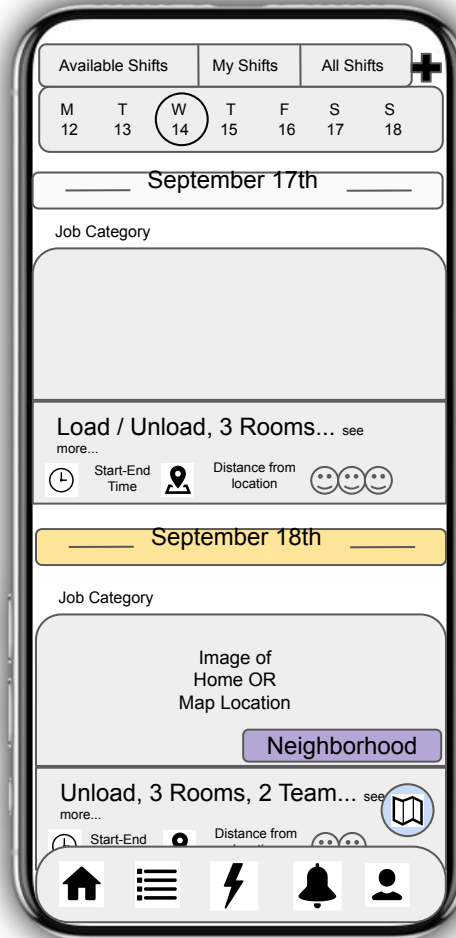
2. Shifts Page

Team Member App

Shifts Page (list view)

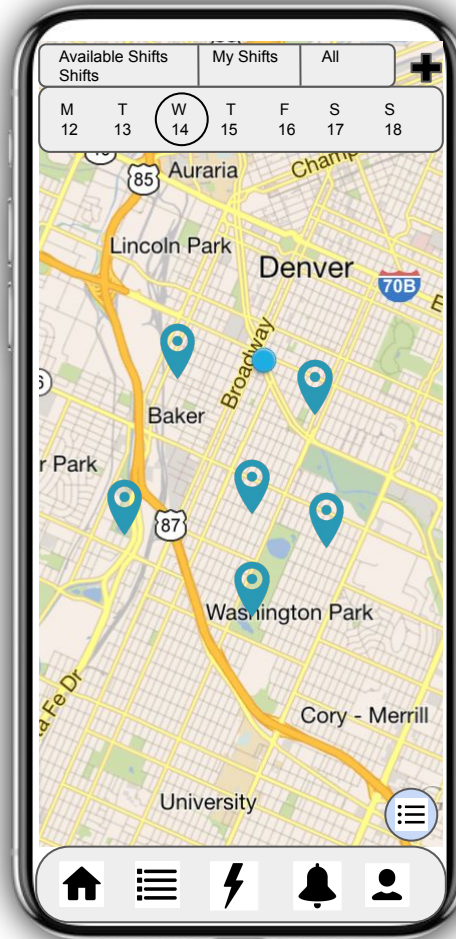
This page will allow team members to view available, scheduled and all shifts in a list format.

The “+” button in the top right corner is only available in app for those assigned as “Chief”. This button allows a chief to create a new shift within the app.



Shifts Page (map view)

This page will allow team members to view available, scheduled and all shifts in a map format.



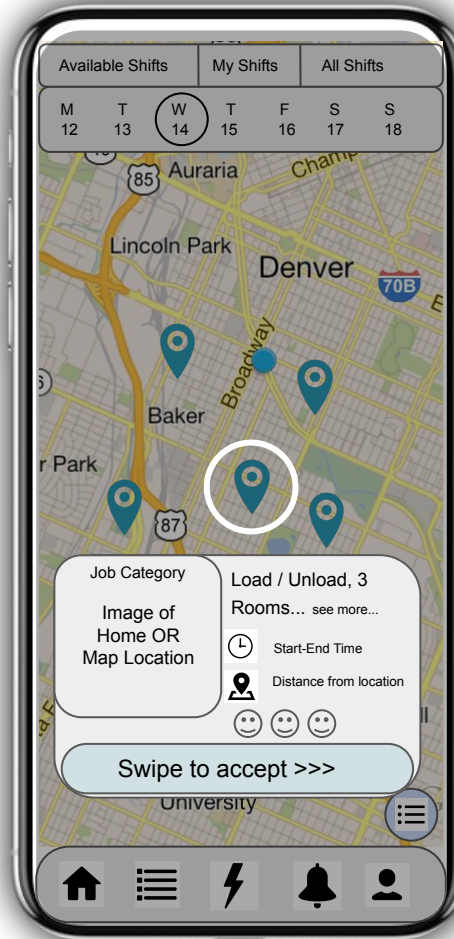
Viewing Shift (Map
View/Available)

Available Shifts (Map View)

When in the “available view” a user can select appointments to view details and accept.

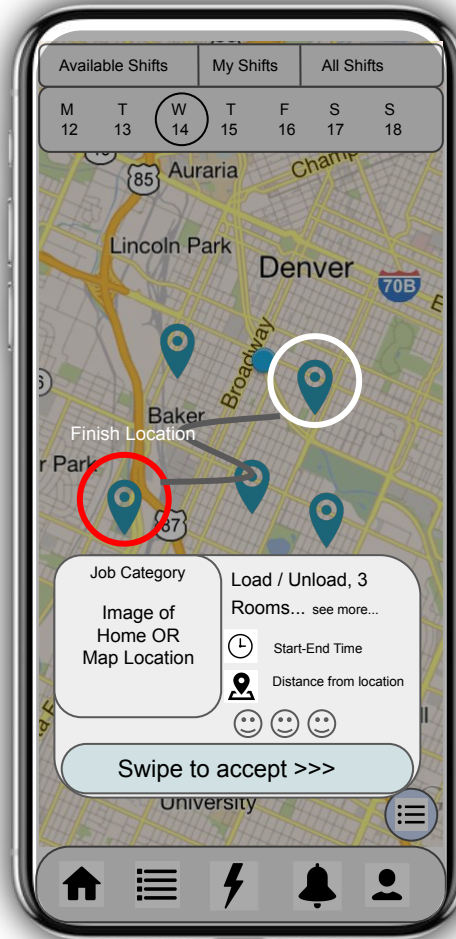
Rules:

- When a shift is selected, page will auto-center on shift and bring up an appointment details preview.
- If shift has two locations map will auto-center and show both locations.
- Team member can accept shift from preview, or click to see full details inside shift.
- After a shift has been accepted, all shifts which start 30 minutes before start time or 30 minutes after should disappear from map view.



Available Shifts (Map View, 2 locations)

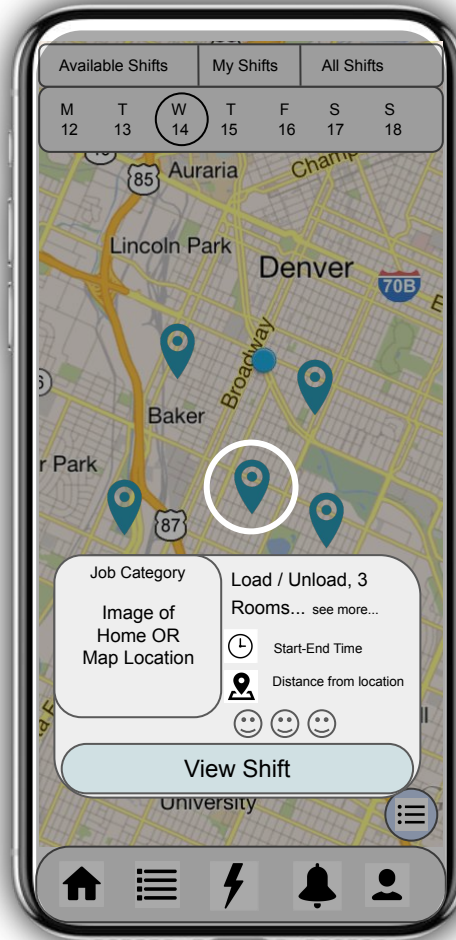
When multiple locations are involved in a shift, user should always see the final destination where the shift will end



Viewing Shift (Map
View/My Shifts)

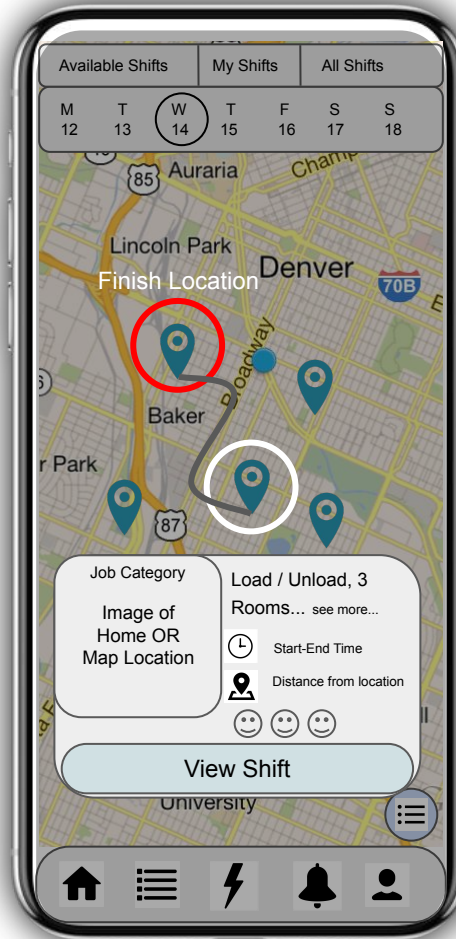
My Shifts (Map View)

When a shift is selected in “My Shift” view, user will see shift preview and “View Shift” options.



My Shifts (Map View, 2 locations)

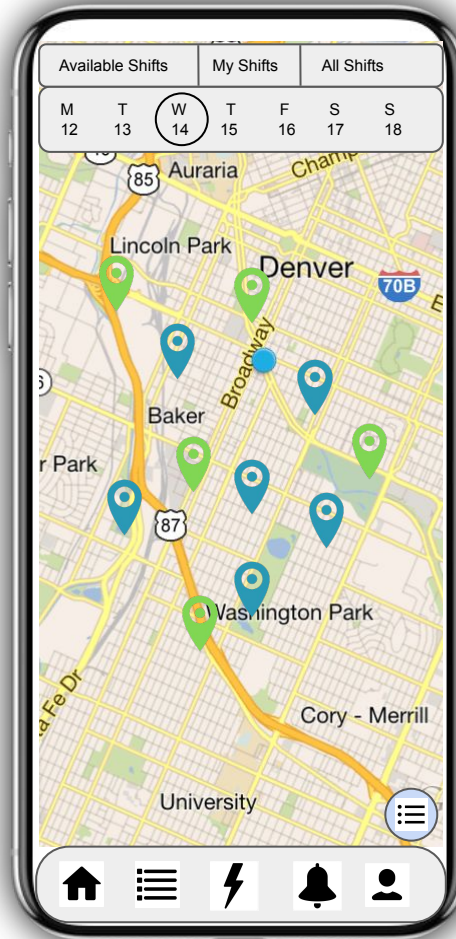
When multiple locations are involved in a shift, user should always see the final destination where the shift will end when selecting that shift



Viewing Shift (Map
View/All Shifts)

All Shifts (Map View)

When in all shift mode, accepted shifts will be green, accepted shifts will be green. When a shift is selected, it will auto center, show relevant preview and show last location (when applicable).



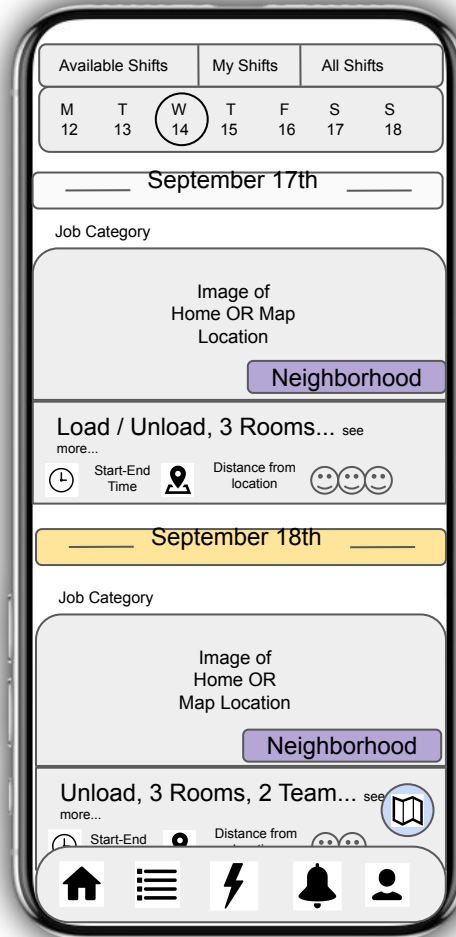
Viewing Shift (List View / Available Shifts

Shifts Page (Available Shifts & My Shifts)

When viewing shifts on in available view, team members can view shifts and accept by swiping right.

Rules:

- When a shift is accepted, shifts starting 30 minutes before start time of shift or 30 minutes after end time of shift will disappear.
- Date in date toolbar can be selected, or user can continuously scroll down list and new dates will show once all shifts for current dates have been shown.
- When on "My Shifts" no swiping feature is available.

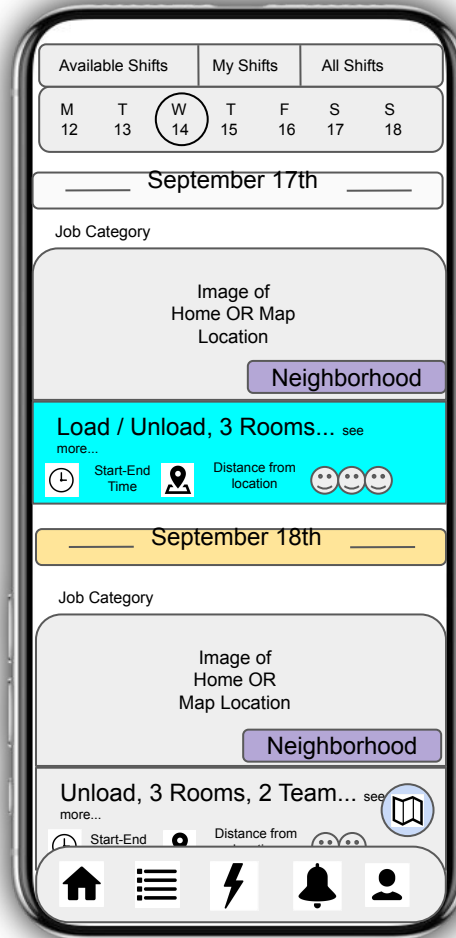


Shifts Page (All Shifts)

When viewing shifts in all shifts view, team members can swipe available shifts.

Rules:

- Accepted shifts have a color to indicate
- Available shifts have no color and can be swiped to accepted



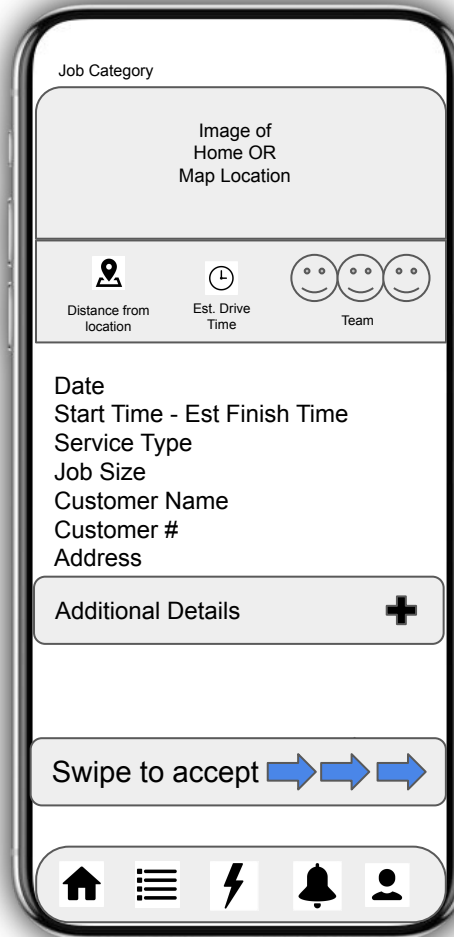
Inside a Shift

Inside a shift (available)

When a user views the inside of an available shift, the information indicated will show as follows. All relevant information

Details:

- Job Category
 - Job Category is determined by job size.
- Location Image
 - Image of home or location on map if home image unavailable
- Team Members
 - Image of team member profiles and names
- Job Details
 - Customer, # and address is not viewable or clickable
- Additional Details
 - Additional details unclickable

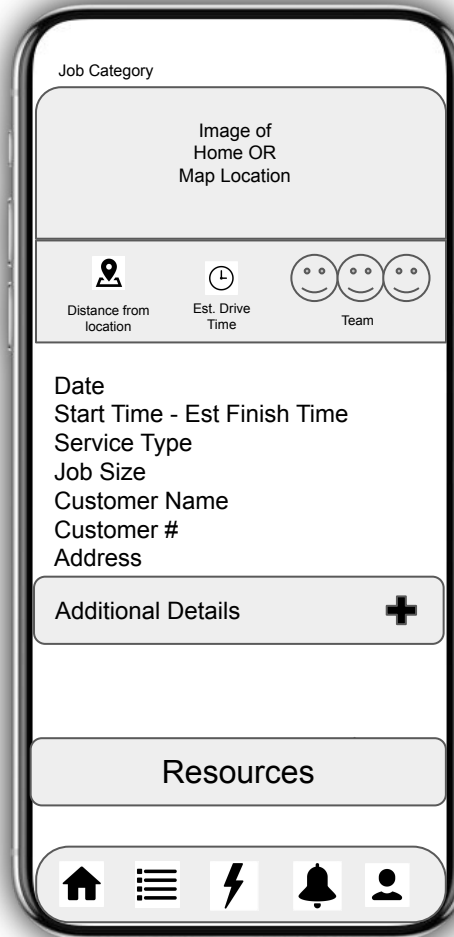


Inside a shift (assigned)

When a user views the inside of an accepted shift, the information indicated will show as follows. All relevant information

Details:

- Job Category
 - Job Category is determined by job size.
- Location Image
 - Image of home or location on map if home image unavailable
- Team Members
 - Image of team member profiles and names
- Job Details
 - Customer, # and address is now viewable and clickable
- Additional Details
 - Additional details viewable



Elements of a Shift

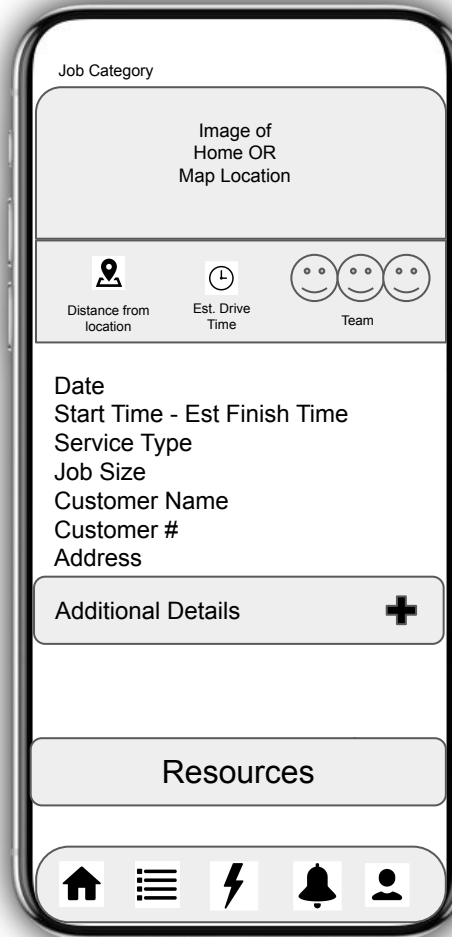
Inside an accepted shift

Upon clicking a shift it will open so user can see all details related to shift.

Upon scrolling they will see an option to view additional images associated with shift

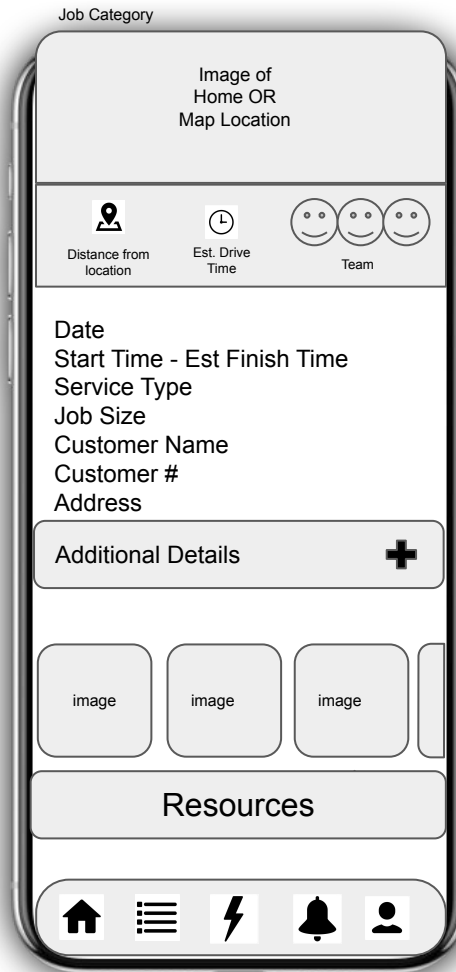
Interactive elements within the appointment:

1. Team Icon
 - a. A pop up opens with team members bio and the option to message / call team members
2. General Appointment Details (Greyed Box)
 - a. A pop up opens with capability for user to request an edit to specific shift details
3. Additional Details
 - a. An accordion style menu opens with additional shift details.
4. Resources (module never moves)
 - a. A resources page opens with additional user resources related to shift
5. Images icons (see next page)
 - a. User can view relevant images to their shift



Inside an accepted shift (cont'd)

At the bottom of the page, the user can view images related to their shift. By scrolling and clicking the images.



Contact Team Member(s)

Contacting team members

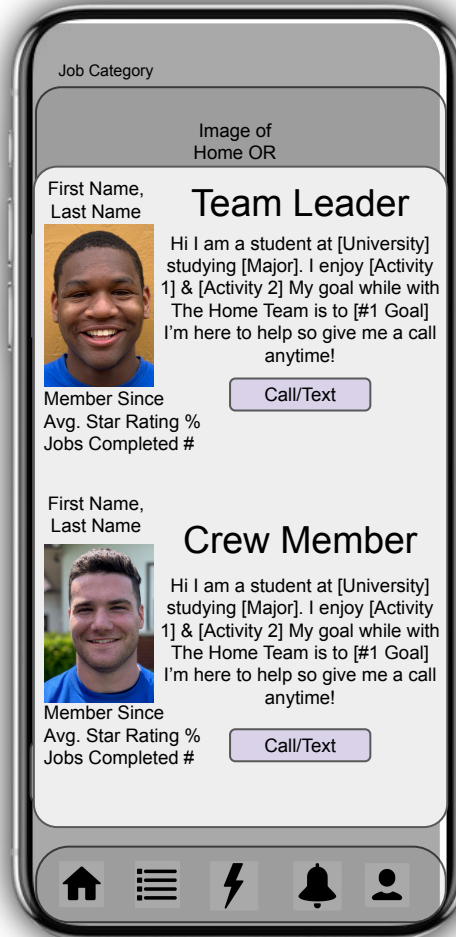
When a user selects any of the team members in the top corner, a pop-up menu of entire team opens up.



Contacting team members

Once selected, team members will see other team members profile picture and bio. They can then call or message team members.

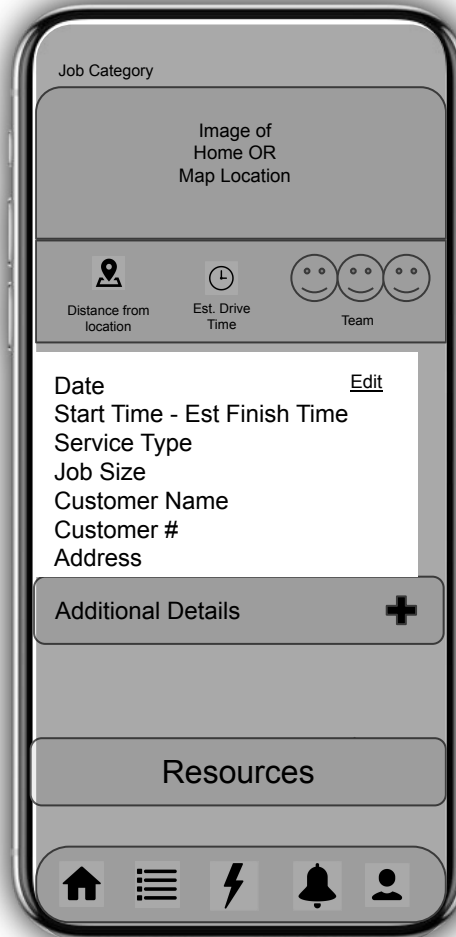
Upon selecting the option, phone opens up option to call or text.



Shift Edits / Edit Requests

Viewing and requesting appointment updates

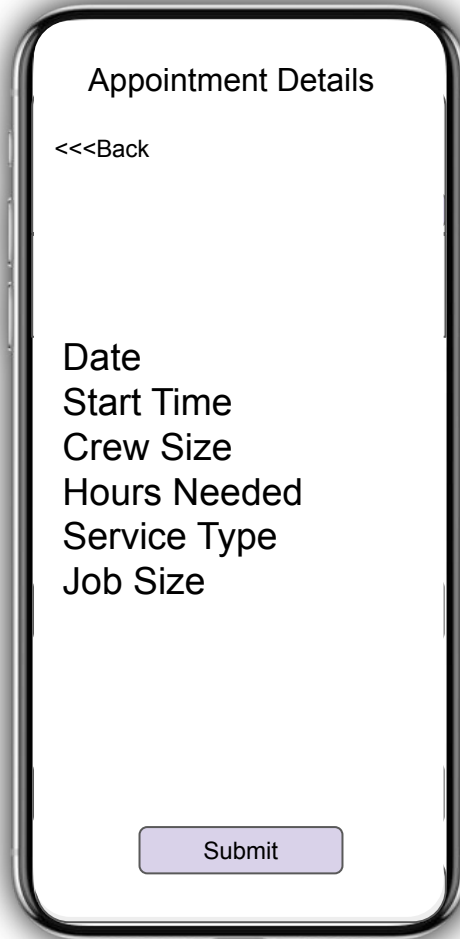
Only Chiefs and Co-Captains can update or request appointment updates. Upon clicking the edit button, appointment details page opens up. Appointment details will be in an editable format.



Viewing and requesting appointment updates

This page represents where a user can edit their appointment details. Page should resemble that of the booking process for a customer.

No changes made are final, rather when Chief/Co-Captain makes a requests, notification is sent to customer to approve or deny.



The image shows a mobile application interface for viewing and requesting appointment updates. The screen is titled "Appointment Details" at the top. Below the title, there is a back button labeled "<<<Back". The main content area lists several appointment details: "Date", "Start Time", "Crew Size", "Hours Needed", "Service Type", and "Job Size". At the bottom of the screen, there is a purple button labeled "Submit".

Appointment Details

<<<Back

Date
Start Time
Crew Size
Hours Needed
Service Type
Job Size

Submit

Accessing & Viewing Resources Page

Viewing resources page

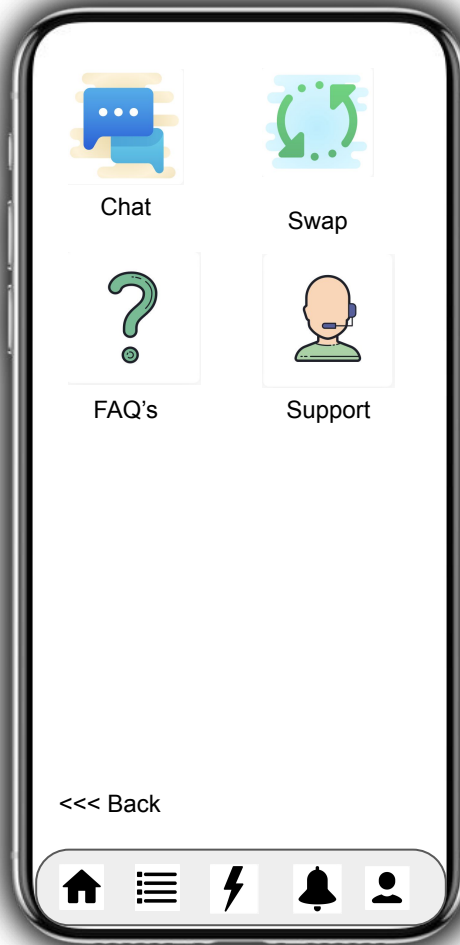
The resources link will take a user to a page that offers additional resources to communicate with customers, corporate and additional resources.



Viewing resources page (Crew)

The resources link will take a user to a page that offers additional resources to communicate with customers, corporate and additional resources.

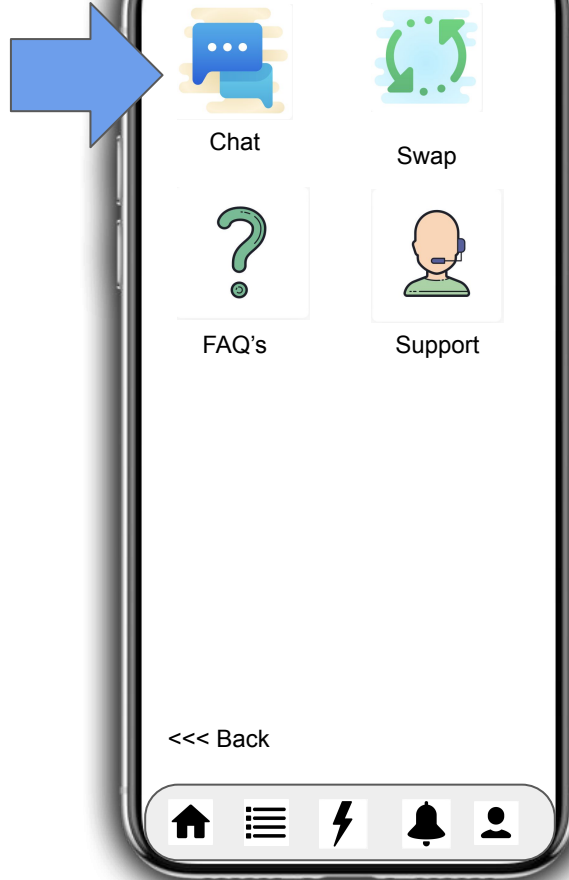
1. Chat
2. Swap Request
3. FAQs
4. Support



Resources - Chat Thread

Chat thread (Crew)

The chat thread allows a team member and customer to communicate directly within the app. Team member will click the indicated icon to open up the chat thread.

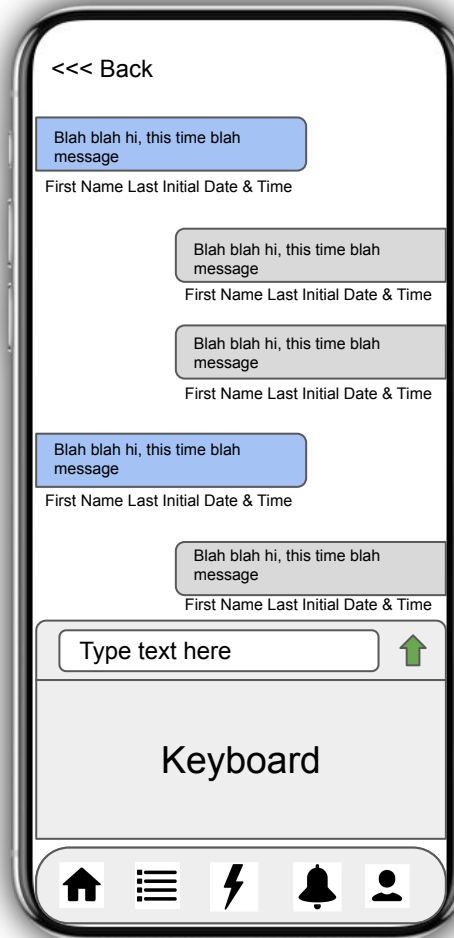


Inside the chat thread

When a user is inside the chat thread they can view and send messages directly to the team leader, other crew members and customer.

Rules:

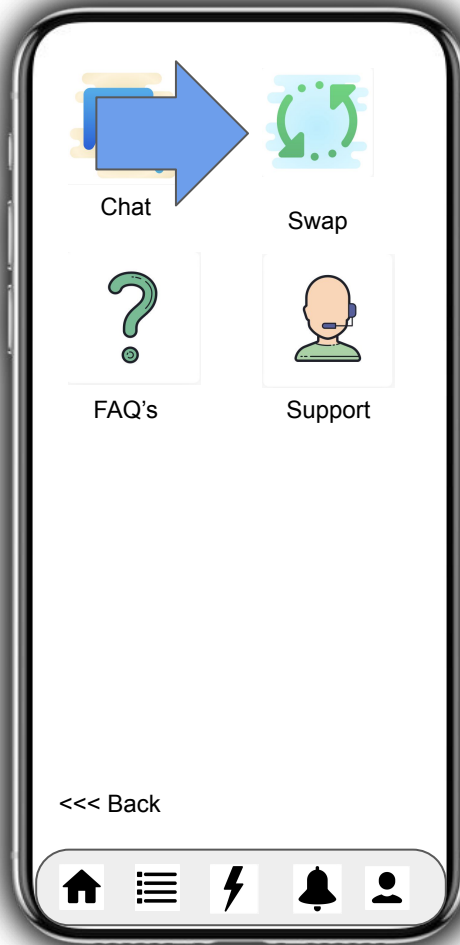
- Only Chief and Customer can participate in chat thread prior to day of appointment.
- On the day of the appointment crew members can participate in chat thread
- Crew members can see chat thread however, cannot participate
- Chief and Customer receive push notifications when a new message is received
- All chats are dated, time stamped and sender stamped
- All chat activity is recorded and logged in the job profile located in the admin dashboard
- Admin can access and participate in chat from within the admin dashboard
- Chat thread is disabled as soon as the Chief clocks in



Resources - Swap Option

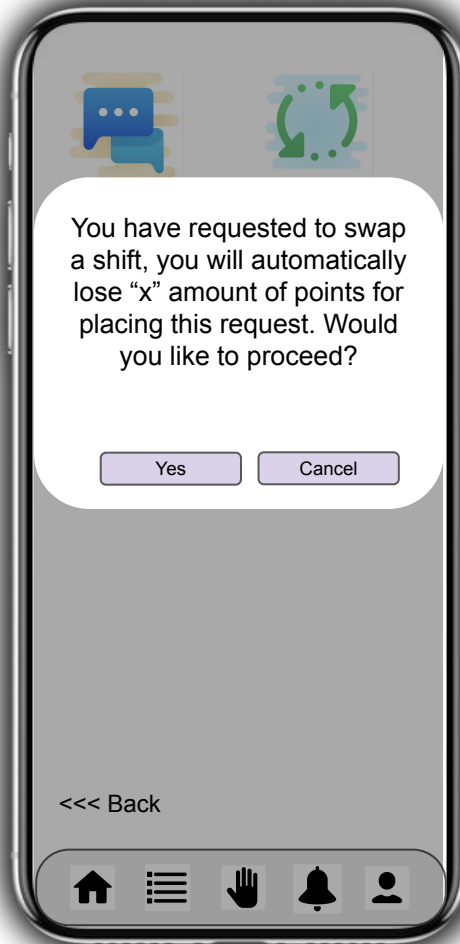
Swap Option (Crew)

The swap option allows team members to request a swap with other team members. If team member selects this option, a notification will be sent to all eligible team members who can accept appointment.



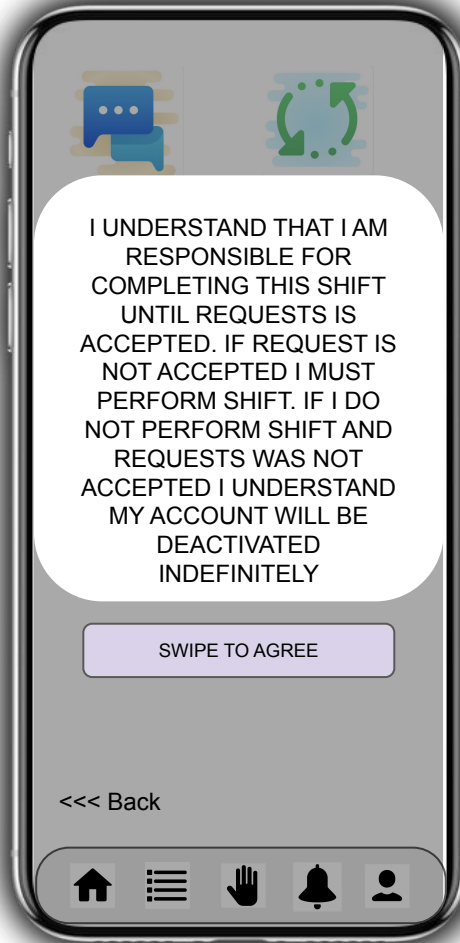
Swap Option (Crew)

Upon clicking a message will appear indicating the implications of a team member making a swap request. If team member chooses yes, they will move on to next page. If "cancel" is selected they will go back to resources page.



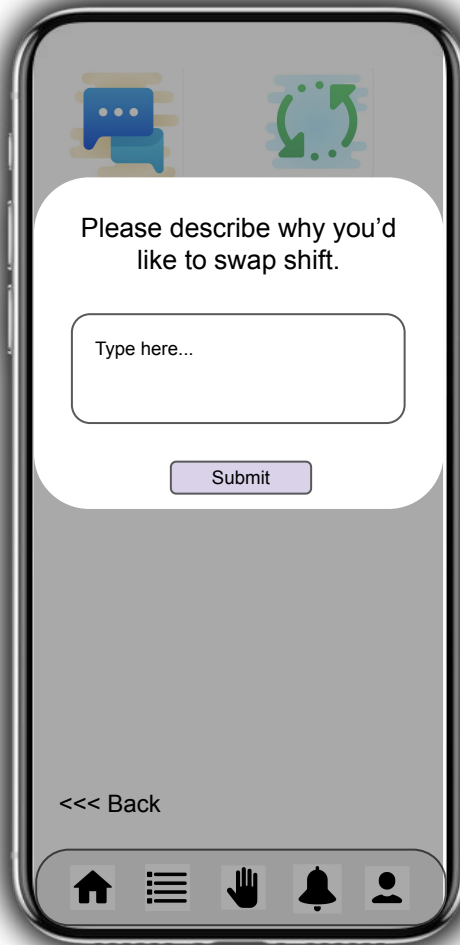
Swap Option (Crew)

Team member must agree to swap terms after selecting to move forward



Swap Option (Crew)

After confirming they'd like to swap shift, they will be prompted to indicate why they'd like to swap shift.



The image shows a mobile application interface for a crew shift swapping feature. At the top, there are two icons: a blue speech bubble icon and a green circular arrow icon. Below these icons is a white rounded rectangle containing the text "Please describe why you'd like to swap shift." and a text input field with the placeholder "Type here...". Below the input field is a purple "Submit" button. At the bottom of the screen, there is a navigation bar with five icons: a home icon, a list icon, a hand icon, a bell icon, and a person icon. Above the navigation bar, there is a "<<< Back" link.

Please describe why you'd like to swap shift.

Type here...

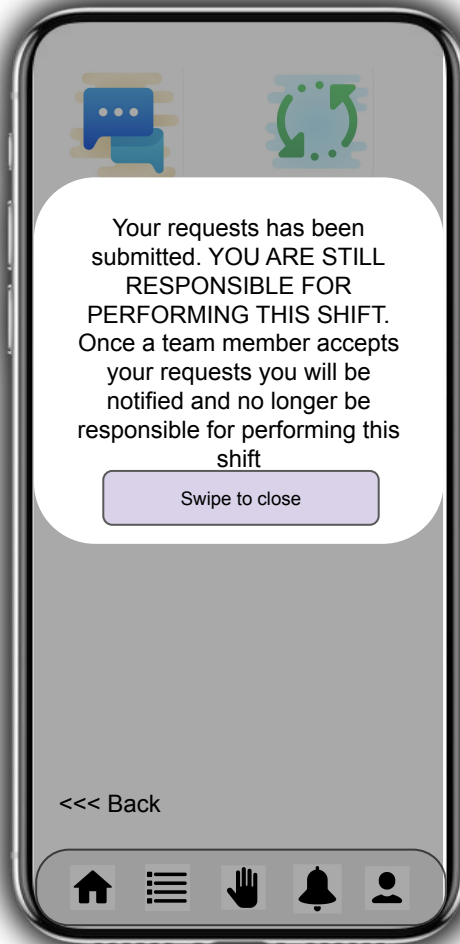
Submit

<<< Back

Swap Option (Crew)

The swap option allows team members to request a swap with other team members. If team member selects this option, a notification will be sent to all eligible team members who can accept appointment.

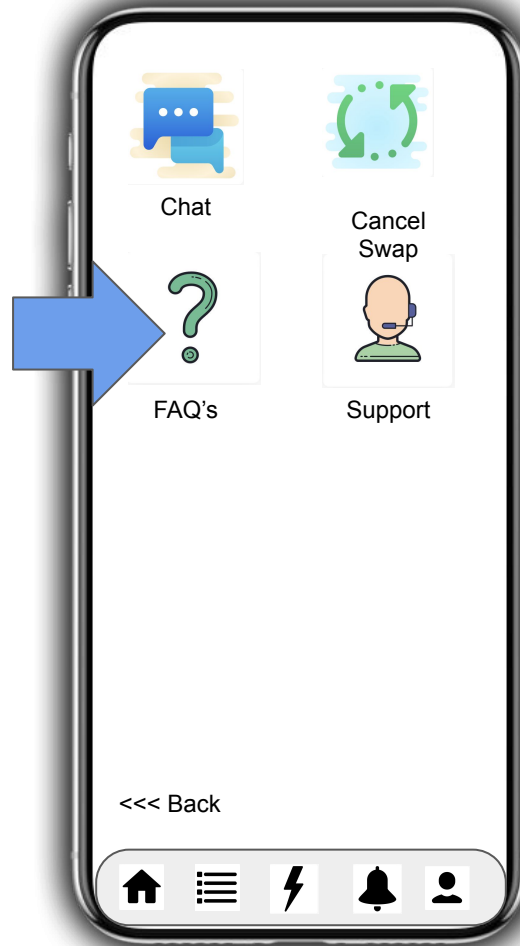
Shift will have a yellow hue in the shift preview in list and map view indicating that swap requests has been made.



Resources - FAQs

FAQs (Crew)

When a team member selects the FAQ page they will be taken to a webpage within the home team website.

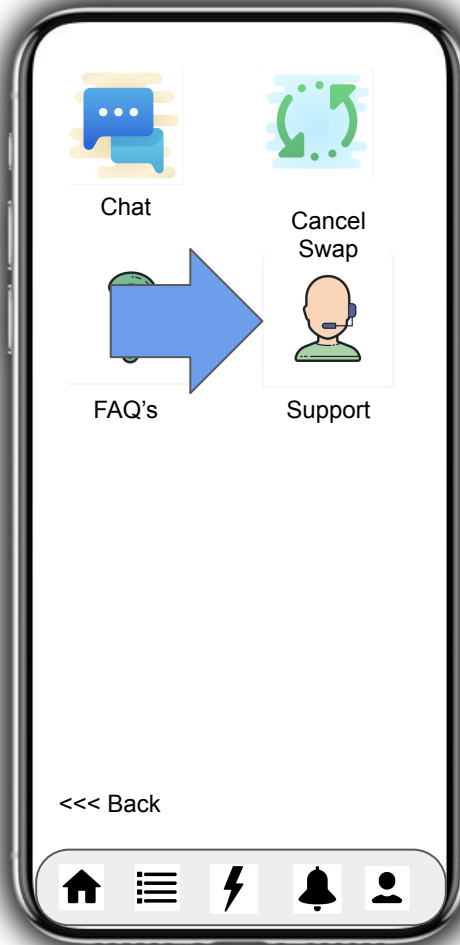


Resources - Support

Support Option (Crew)

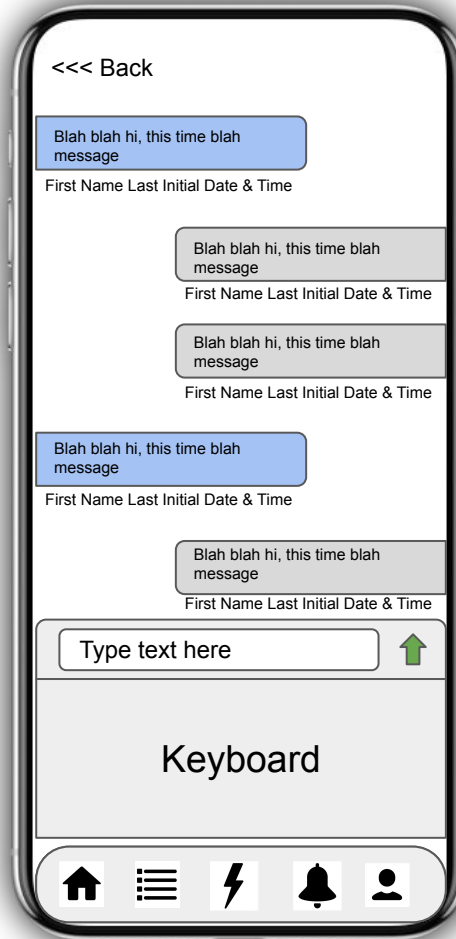
When support is selected, team member will be taken to a chat thread to communicate with a relevant support member.

If no team member is available, they will be able to send in support requests that will be received in admin dashboard.



Support option with live help available

A chat thread will be available to communicate with support team member



Support option, live help unavailable

A message will be submitted that will be received
through admin dashboard for a future response.

Support is currently offline, please
submit a contact form below

CONTACT US

Please fill out this form to contact us and we'll
get back to you right away!

NAME:






EMAIL:

PHONE NUMBER:

MESSAGE:

Send Message

FAQs



End Crew Resources

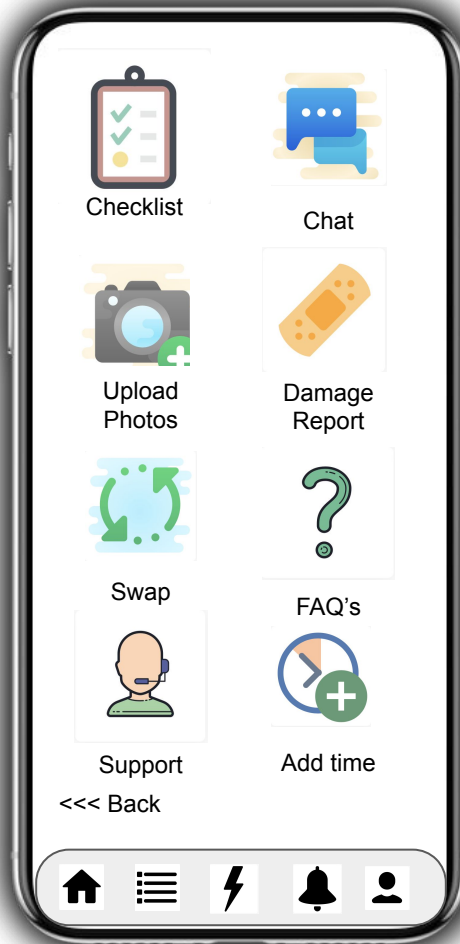
Chief Resources

Viewing resources page (Chief)

The resources link will take a user to a page that offers additional resources to communicate with customers, corporate and additional resources.

The Chief will have the following additional resources:

- Checklist
- Upload photos
- Damage report

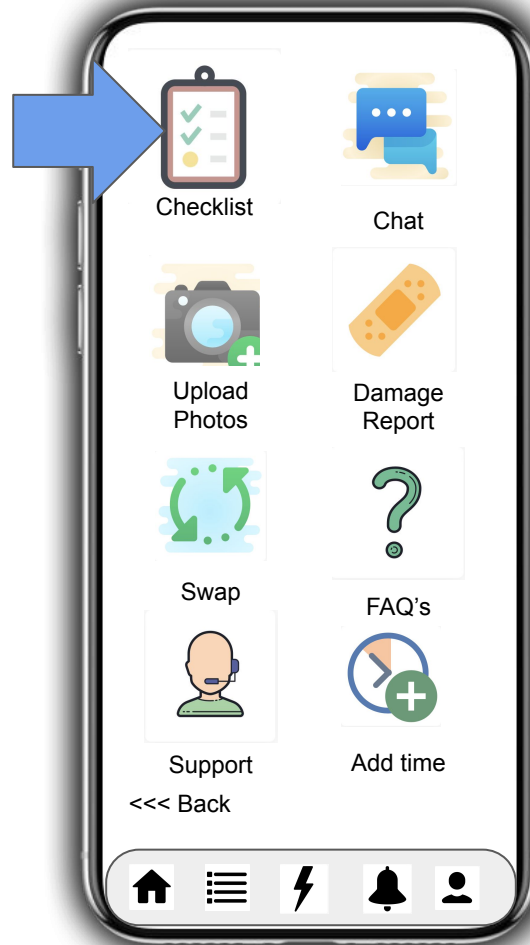


Resources- Checklist

Checklist page for (Chief)

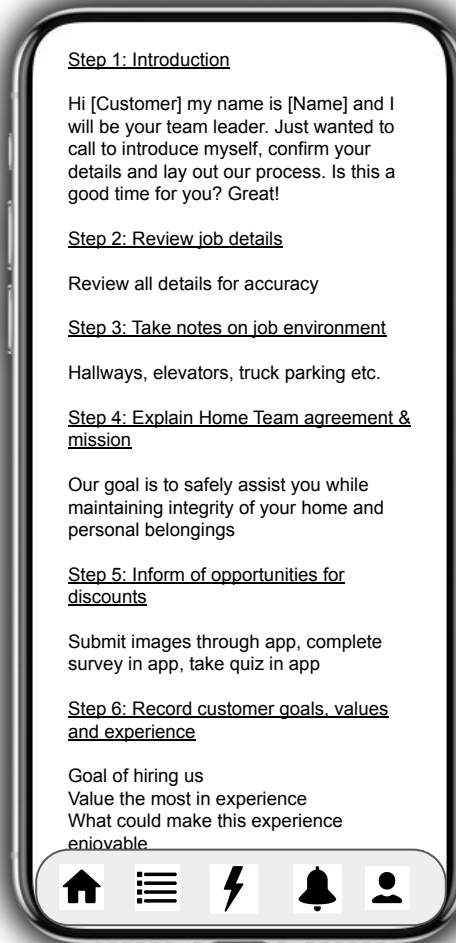
The checklist page where will be where the Chief documents required interactions between themselves and the customer. The checklist page will feature a different set of questions based off proximity to job start time. Checklist will be broken up into 3 sections.

1. 24hrs after accepting
2. 72hrs before shift
3. Day of shift



Checklist page for (Chief)

- Step 1: Confirming appointment details
- Step 2: Update customer on any relevant changes
- Step 3: Inform customer of team members
- Step 4: inform customer of schedule and offer additional hours/crew
- Step 5: inform customer of discount opportunities
- Step 6: ensure customer is prepared



Within 24hrs of accepting shift:

- Confirm details
- Introduce self
- Discuss process
- Working conditions
- What the home team agreement is
- Submit images
- Customer goals
- Customer values
- Customer experience

Within 72hrs of accepting shift:

- Confirm details are the same
- Inform of any changes
- Upsales (hrs, guys)
- Timeframe
- Discounts opportunities
- Preparation

Checklist page for (Chief)

Within 24hrs of accepting a shift, the Chief must contact the customer in order to introduce themselves, acquire additional details and inform customer of opportunities.

Step 1: In this section of the app, team member will have a script to read from for introduction.

Step 2: Job details relating to specific shift will be present here and chief will review details to ensure accuracy.

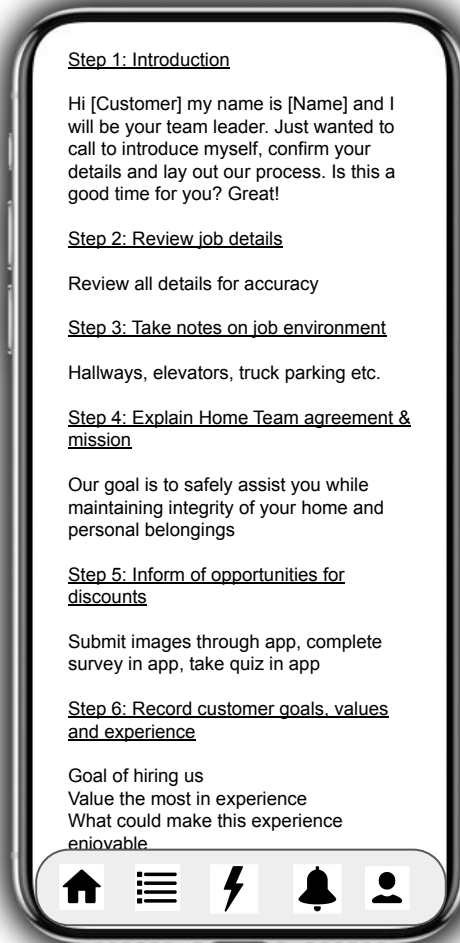
Step 3: Chief will have script, detailing what to asks and text box available for customer to respond

Step 4: Chief will have script of home team agreement and outline process from now until completion

Step 5: Chief will have script of each opportunity to explain

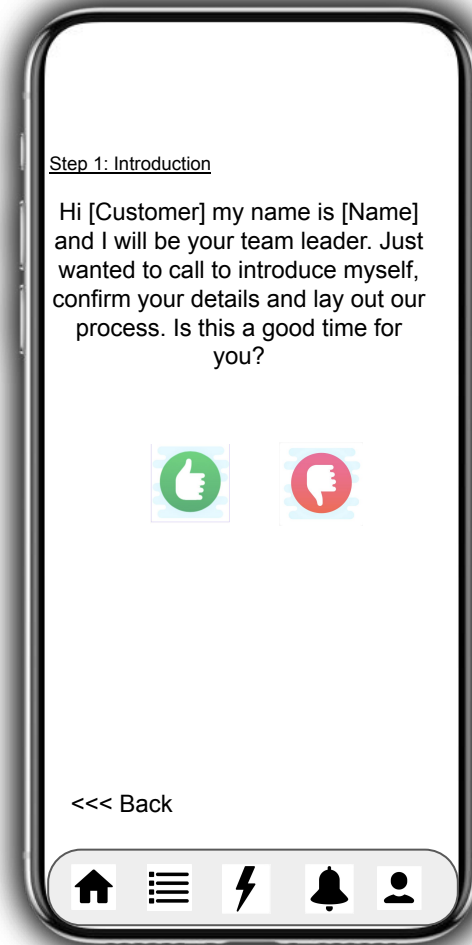
Step 6: Chief will have a script and text box to fill in customer response

<<< Back



Checklist 1 - 24hrs after accepting

Checklist 1 - Step 1



Checklist 1 - Step 1 (if not a good time)

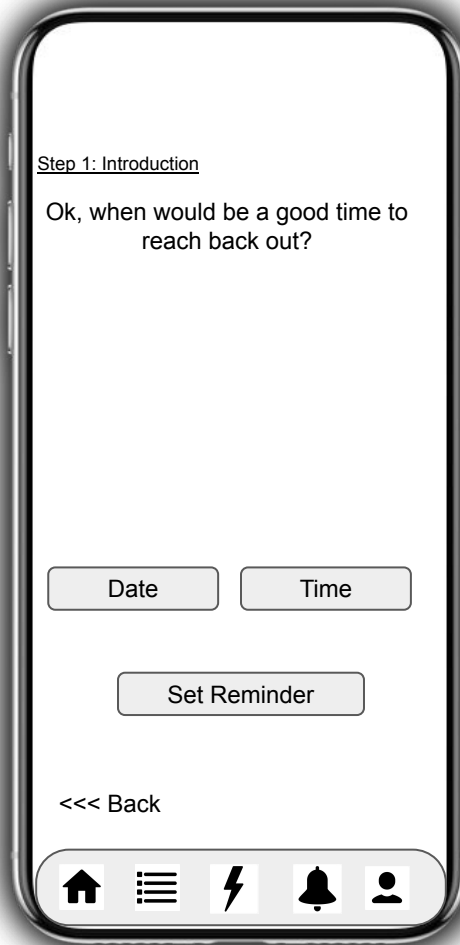
Step 1: Introduction

Ok, when would be a good time to reach back out?

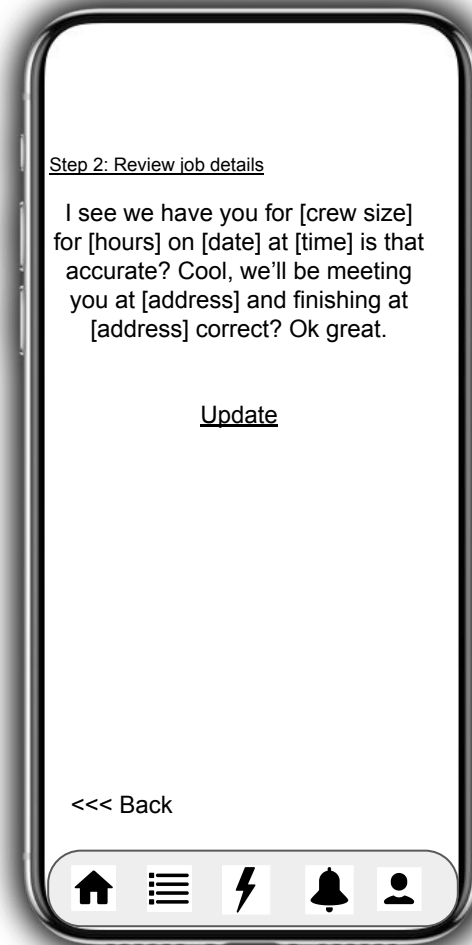
Date Time

Set Reminder

<<< Back



Checklist 1 - Step 2



Checklist 1 - Step 2 (if
update is needed)

A smartphone screen displaying a form titled "Appointment Details". At the top left of the screen is a back arrow icon followed by the text "<<<Back". Below this, the form lists six fields: "Date", "Start Time", "Crew Size", "Hours Needed", "Service Type", and "Job Size". At the bottom center of the screen is a light purple rectangular button with the text "Submit".

Appointment Details

<<<Back

Date
Start Time
Crew Size
Hours Needed
Service Type
Job Size

Submit

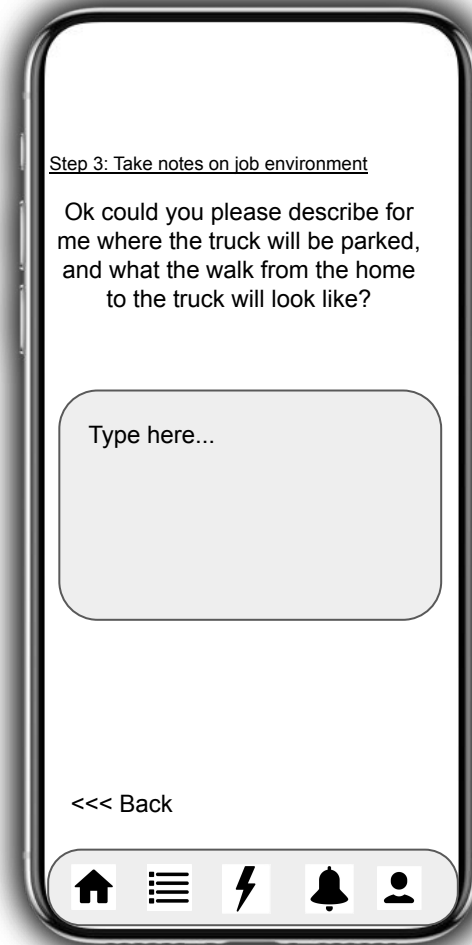
Checklist 1 - Step 3

Step 3: Take notes on job environment

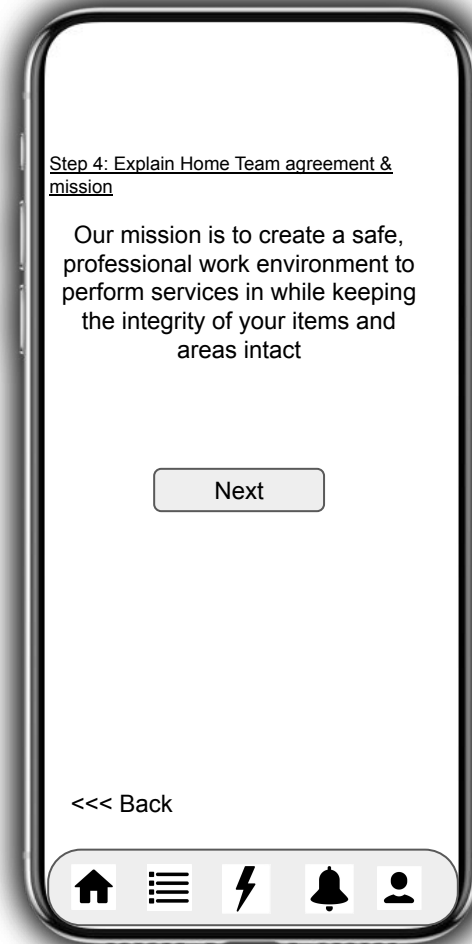
Ok could you please describe for me where the truck will be parked, and what the walk from the home to the truck will look like?

Type here...

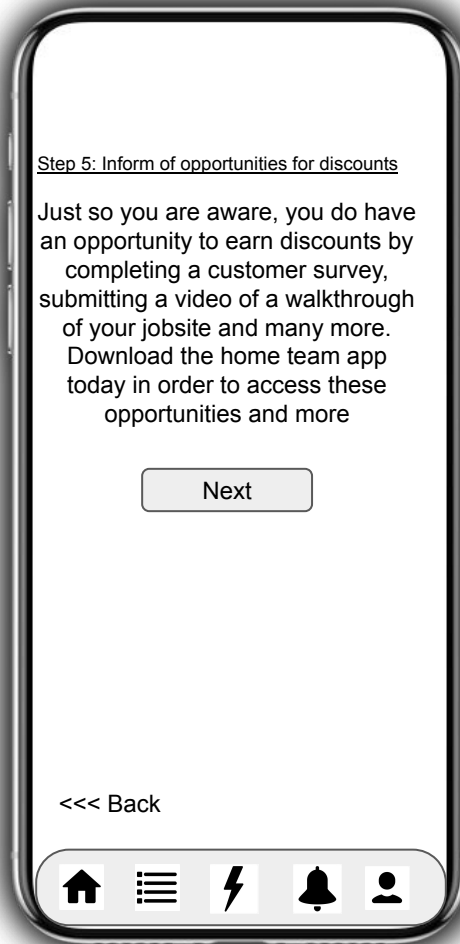
<<< Back

The image shows a mobile application interface on a smartphone. At the top, the title "Step 3: Take notes on job environment" is underlined. Below the title is a text prompt: "Ok could you please describe for me where the truck will be parked, and what the walk from the home to the truck will look like?". Underneath the prompt is a large, light gray rounded rectangular text input area with the placeholder text "Type here...". At the bottom of the screen, there is a navigation bar with five icons: a home icon, a list icon, a lightning bolt icon, a bell icon, and a user profile icon. Above the navigation bar, the text "<<< Back" is displayed.

Checklist 1 - Step 4



Checklist 1 - Step 5



Checklist 1 - Step 6

Step 6: Record customer goals, values and experience

Last just a few quick questions for myself and the team to be aware of...

What is the main goal we can accomplish for you?

Type here...

What do you value most in a service experience?

Type here...

How can we make this experience awesome for you??

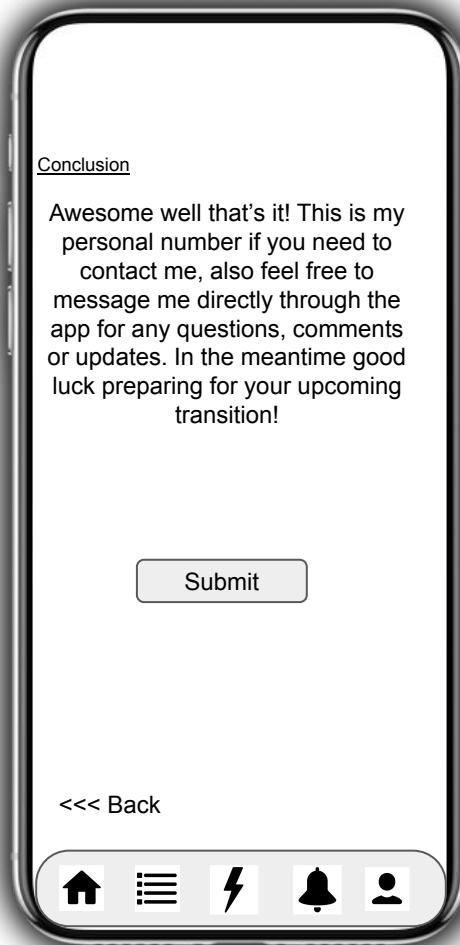
Type here...

Next

<<< Back

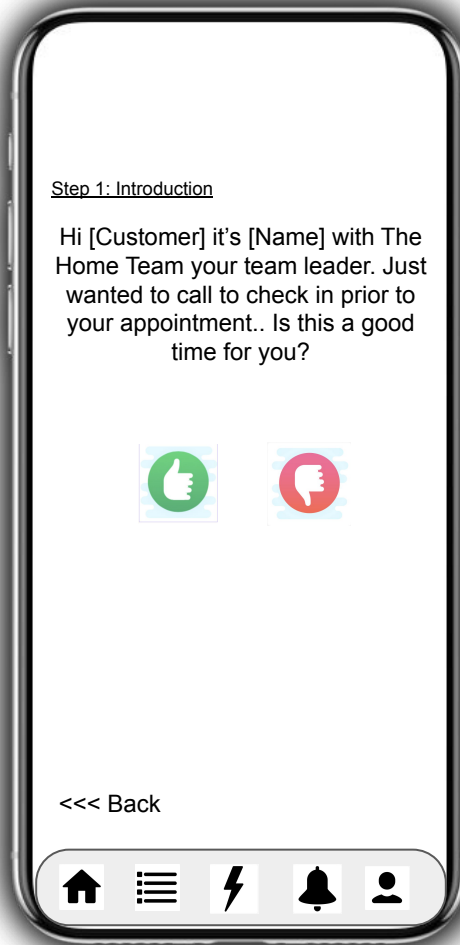
    

Checklist 1 - conclusion



Checklist 2- 72hrs before shift

Checklist 1 - Step 1



Checklist 2- Step 1 (if not a good time)

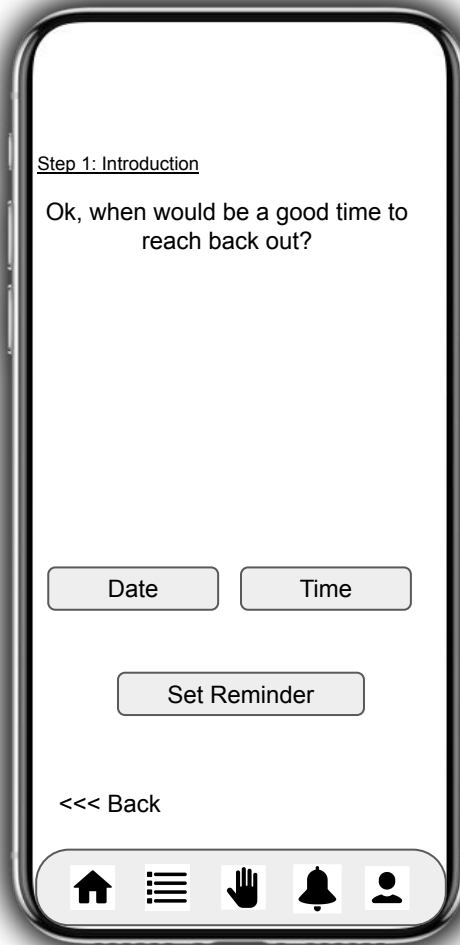
Step 1: Introduction

Ok, when would be a good time to reach back out?

Date Time

Set Reminder

<<< Back

A mobile application interface displayed on a smartphone. The screen has a white background. At the top, the text "Step 1: Introduction" is underlined. Below this, a question is asked: "Ok, when would be a good time to reach back out?". Further down, there are two input fields labeled "Date" and "Time". Below these fields is a button labeled "Set Reminder". At the bottom of the screen, there is a text link "<<< Back". At the very bottom of the phone's screen is a dock containing five icons: a house (home), a list (menu), a hand (gesture), a bell (notifications), and a person (profile).

Checklist 2- Step 2

Step 2: Confirm Details

I see we have you down for [crew size] on [date] at [time] with a starting address of [location 1] ending at [location 2] is that all still accurate?

Update



<<< Back



Checklist 2 - Step 3

Step 3: Team & ETA

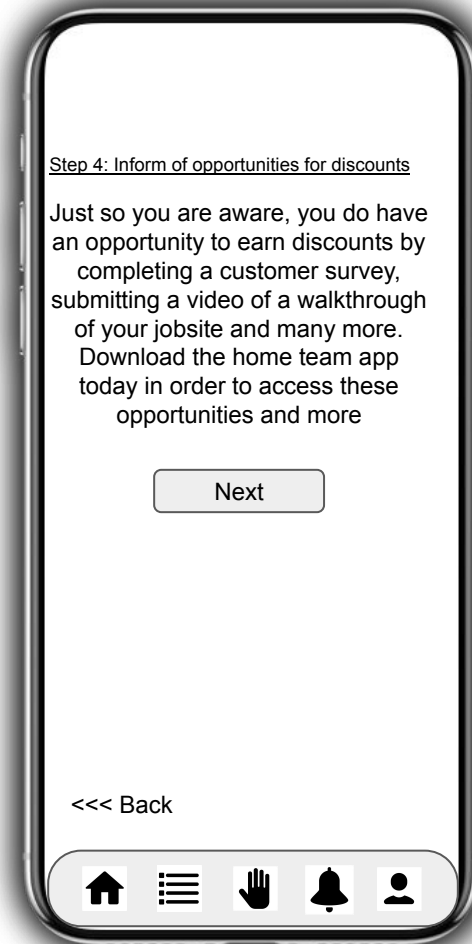
Great. Looks like our arrival window will be between [time] and [time]. Your team will be [team members name(s)] and myself helping. Based off of similar jobs, we'd recommend an additional team member to ensure we complete the job in the allotted time. Would you want to add another team member or extend your appointment?

Update

<<< Back



Checklist 2 - Step 4



Checklist 2 - Step 3

Step 5: Preparedness

On move day the essentials to being prepared are:

1. Having all boxes closed and taped shut
2. Having all furniture disassembled
3. Having all pathways cleared.

Knowing this On a scale from 1-10 how prepared would you say you are?

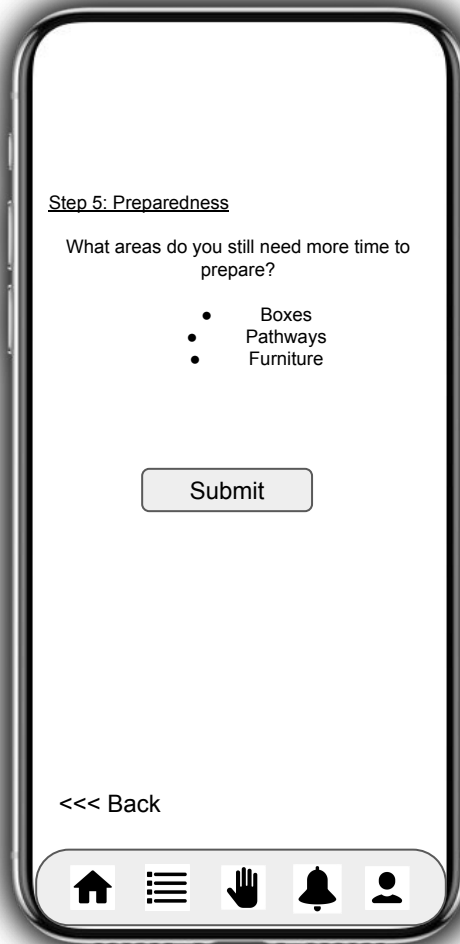


<<< Back



Checklist 2 - Step 5

If customer says anything under a 9, if customer rates a 9 or above, go to completion screen



The image shows a mobile application screen for 'Step 5: Preparedness'. The screen has a white background with a black border. At the top, the title 'Step 5: Preparedness' is underlined. Below the title, the question 'What areas do you still need more time to prepare?' is displayed. Underneath the question is a bulleted list with three items: 'Boxes', 'Pathways', and 'Furniture'. A 'Submit' button is centered below the list. At the bottom left of the screen, there is a '<<< Back' link. At the very bottom, there is a navigation bar with five icons: a house, a list, a hand, a bell, and a person.

Step 5: Preparedness

What areas do you still need more time to prepare?

- Boxes
- Pathways
- Furniture

Submit

<<< Back

Home List Hand Bell Person

Checklist 2 - Step 6

Step 6: Explain Home Team agreement & mission

Great well we are all set! Again feel free to call me for anything at all. I'll reach out the day of to let you know our eta. In the meantime check out the app, earn some discounts and we look forward to working with you!

Submit

<<< Back

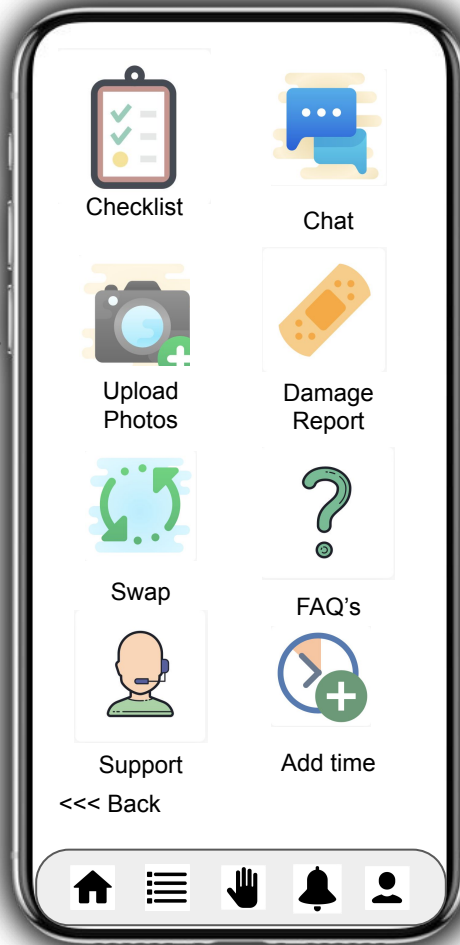
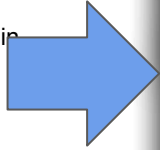


Resources- Uploading Photos

Uploading photos of job-site activities

This feature will allow chiefs to upload photos of job site and job site activity to submit to corporate.

This feature is enabled once the Chief clocks in however is in-accessible until Chief clocks in.

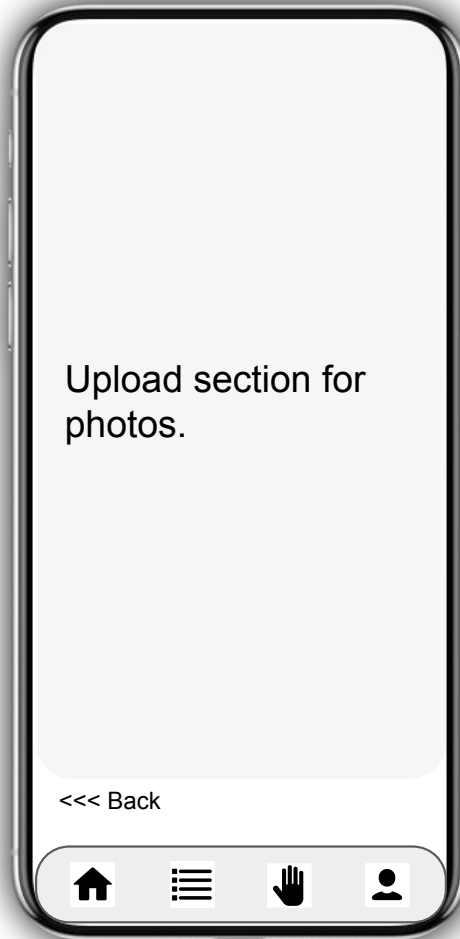


Uploading photos of job-site activities

Chief can upload multiple photos. Once a photo is uploaded Chief must tag the photo to a certain category. They will then have option to leave comment. After submission they can then upload additional photos through same process

Rules:

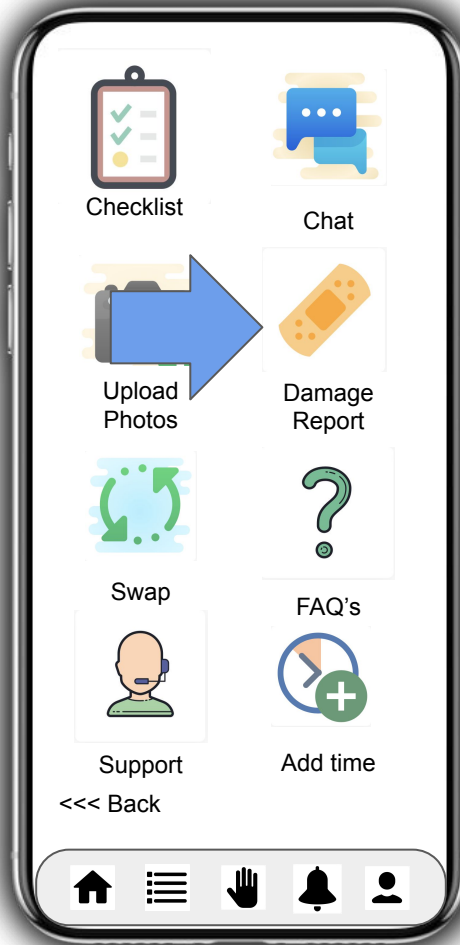
- Photo Tags:
 - Team Photo
 - Quality Work
 - Team at work
- All photos are added to job profile in the dashboard
- All activities are logged within dashboard activity log in job profile



Resources- Damage Report

Damage Report

If ever there are any issues on a job-site Chief can create and submit a damage report of the incident.



Damage Report Feature Details

Upon selecting the damage report option, chief will be able type in a message indicating what happened in a text field.

Upon typing the “next” option will appear for user to go on to the next prompt.



We're sorry for the inconvenience. Please submit a damage report and we will reach out within 24hrs.

Please type what happened here

Next

<<< Back

Home, Menu, Hand, Profile icons

The image shows a mobile application interface for a damage report feature. At the top, a message reads: "We're sorry for the inconvenience. Please submit a damage report and we will reach out within 24hrs." Below this is a large, light gray rounded rectangular text input field with the placeholder text "Please type what happened here". Underneath the input field is a light gray rounded rectangular button labeled "Next". At the bottom of the screen, there is a white bar containing a "<<< Back" link. Below this bar is a dark gray navigation bar with four white icons: a house (Home), three horizontal lines (Menu), a hand (likely representing a damage report or help), and a person silhouette (Profile).

Damage Report Feature

Uploading Images

On this page chief can upload as many images as necessary. Chief can then add comments to a picture prior to uploading it in order to detail damage related to the picture.

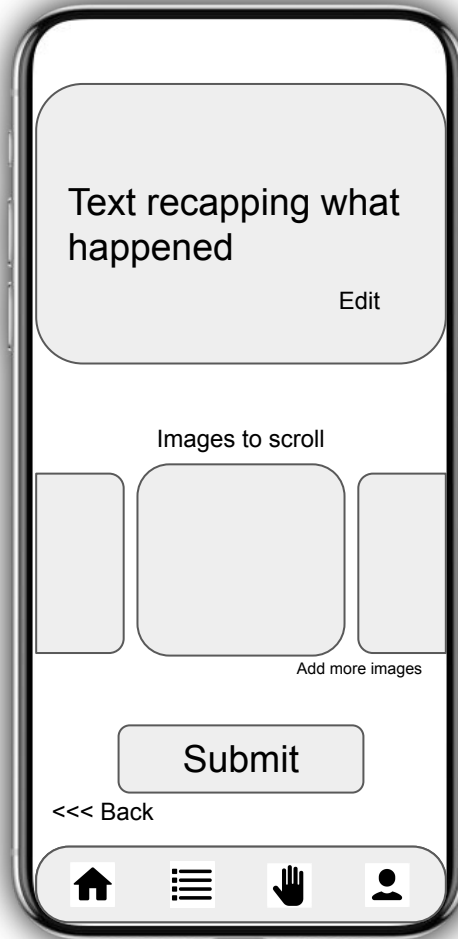


Damage Report Feature Completion

On this page, chief will view image details and text prior to submitting. Once chief reviews details they can hit submit and the report will be sent.

Rules:

- Damage report will be sent and attached to the job profile
- Report submission will be logged in the activity log
- Admin receives a notification of new damage report in the dashboard



Resources- Add Time

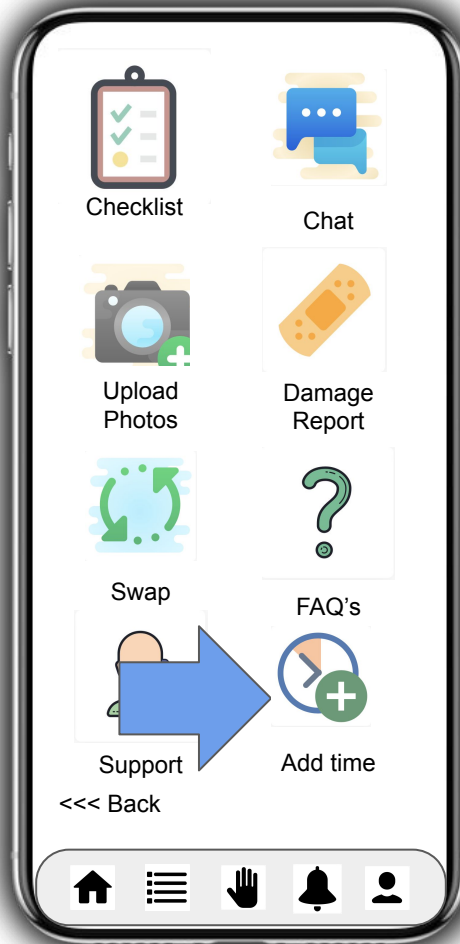
Add Time

Sometimes an appointment may need to be extended and we do not have the customers card on file. If a customer's card is not on file the "add time" icon should be present (third party jobs)

When this option is selected, team member will place deposit on card of \$1 for future billing, and extend out appointment.

Rules:

- Add time icon should only appear if no payment details are on file



Add Time

When a customer needs more time, Chief will complete the following form.

- Additional team members needed?
 - Dropdown menu
 - Yes or No
- How many?
 - Drop down menu
 - 1-3
- What address
 - Address field with map

Rules:

- If chief selects yes to “more team members are needed” then all other questions will be activated, if not Chief will go straight to payment details
- If “New Shift” option is selected, Chief will be taken through the new shift process. Customers general information will auto populate (name, #, email)

Add Time

<<<Back New Shift

Are additional Team Members Needed?

How Many?

What address?

Payment Details

Name on Card

Card #

Billing Zip CVC #

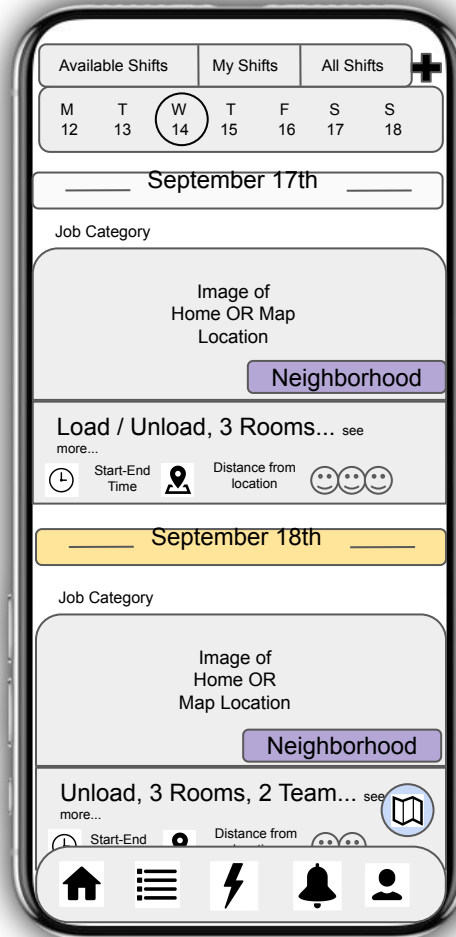
Submit

Creating a new shift (Chiefs
Only)

Shifts Page (list view)

This page will allow team members to view available, scheduled and all shifts in a list format.

The “+” button in the top right corner is only available in app for those assigned as “Chief”. This button allows a chief to create a new shift within the app.



Creating a shift details

When creating a new shift, chief will be taken through relevant prompts per screen.

- Service Type
 - Drop down menu
 - Helping hand
 - In-house move
 - Loading / Unloading
- Job Type
 - Drop down menu
 - Loading
 - Unloading
 - Load & Unload
- Date & Time
 - Calendar option
- Hours
 - Drop down menu
 - 1-8 (depending on time)
- Crew Size
 - Drop down menu
 - 1-5
- Job Size
 - Drop down menu
 - Studio
 - 1 - 5 bed

The image shows a smartphone screen with a form titled "New Shift". The form contains the following fields, each with a label and a horizontal line for input:

- <<<Back
- Service Type
- Job Type
- Date & Time
- Hours
- Crew Size
- Job Size

At the bottom of the screen, there is a purple button labeled "Next".

Creating a shift details

Details cont'd

- Furniture
 - Drop down menu
 - Options from booking process
- Boxes
 - Drop down menu
 - Options from booking process
- Stairs
 - Drop down menu
 - Options from booking process
- Address
 - Predictable address & map
- Customer First Name
 - Text field
- Customer Last Name
 - Text field
- Customer #
 - Text field
- Customer E-mail
 - Text field

<<<Back New Shift

Furniture

Boxes

Stairs

Address

Customer First Name

Customer Last Name

Customer #

Customer Email

Next

Creating a shift details

Details cont'd

- Pets
 - Dropdown menu
- Parking Instructions
 - Text field
- Security Instructions
 - Text field
- Message to the team
 - Text field

Once a new shift is submitted it will be available in the app to all team members. An appointment will also be created in the app for the customer.

New Shift

<<<Back

Pets

Parking Instructions

Security Instructions

Message to The Team

Payment Details (optional)

Name on Card

Card #

Billing Zip

CVC #

Submit

End

2. Shifts Page

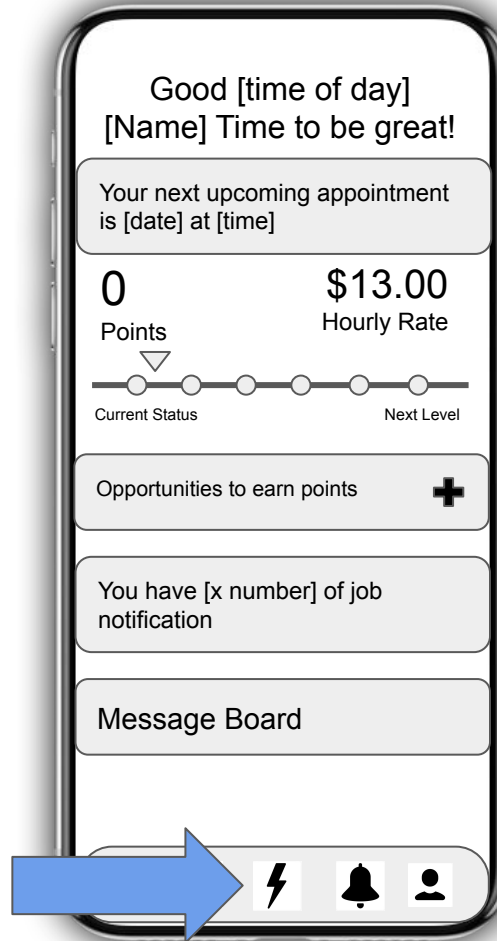
Team Member App

3. Calendar

Team Member App

Calendar Page

Click the indicated icon will take user to the calendar page



Calendar Page - Go Live scheduling

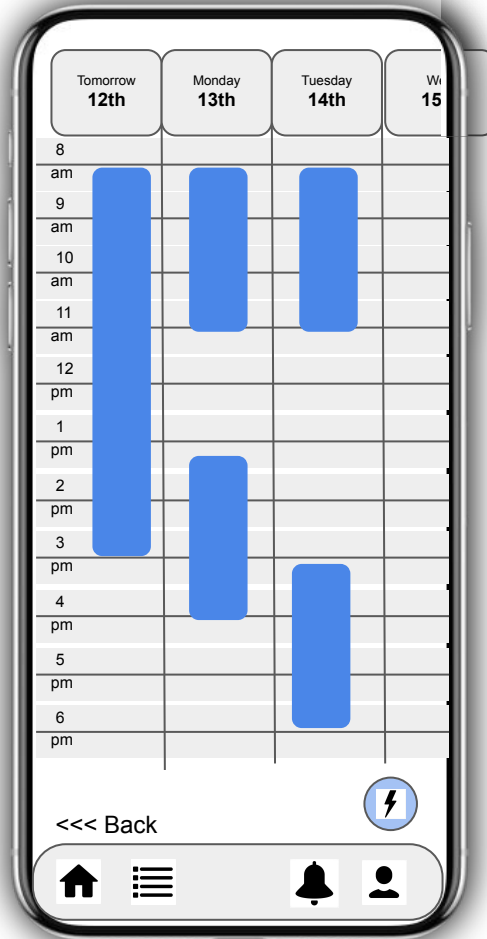
This page will be used by team members to create their calendar and indicate their availability. They can swipe to the left and see all future dates for the next 15 days.

They will simply swipe down from a start time to a stop time indicating when they are available.

Times they indicate they are available we will auto schedule them for shifts that are booked during that time.

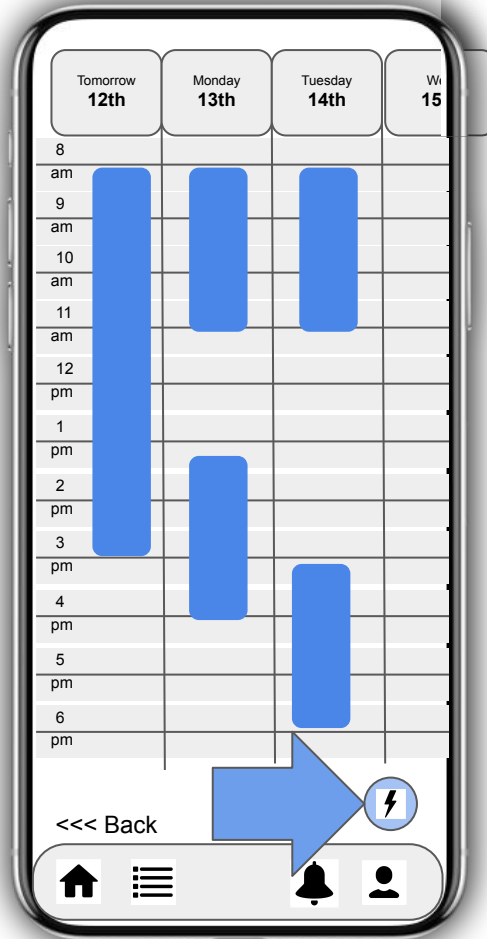
Rules:

- Shifts will be assigned based off of position, rank, hours worked and overall rating.
- On an auto assigned shift, the first team member will be the blended best of the above indicated criteria, the next team member will be the blended worst and that pattern will repeat until shift is staffed.
- There is no limit to how long a team member can go live in a day.
- When a team member goes live they earn additional pay of \$2 and 50% more points per shift.
- Scheduling is by the half an hour increments



Calendar Page - Go Live scheduling

- By clicking the lightning bolt icon in the corner, team members can access the “Go Live Now” feature.



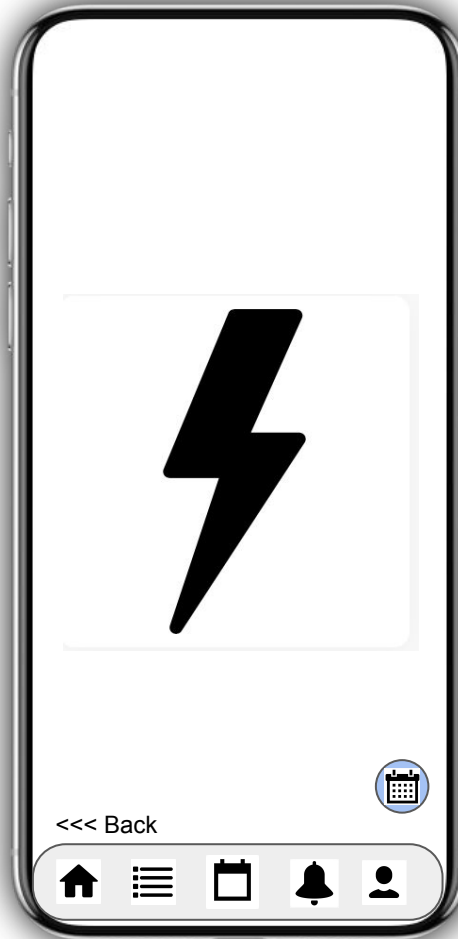
Calendar Page - Go Live Now

Go Live now allows team members to make themselves available for on demand work. When a customer makes a same day or on-demand requests it will go to members who are "Live".

"Going Live" is activated by hitting the lighting bolt. You can end going live by also clicking the lighting bolt.

Rules:

- When a member is live they earn 10 points an hour
- When assigned to a live shift they earn double the points
- While live team members pay increases by \$1/hr. From whatever their initial pay is to a maximum of \$21/hr
- Live feature is automatically deactivated after 8pm same day



End

3. Calendar Page

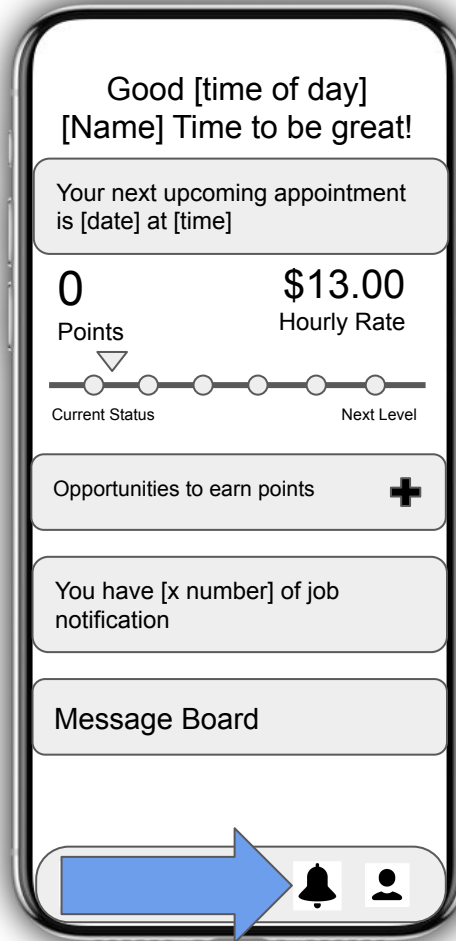
Team Member App

4. Notifications & Community Feed

Team Member App

Home Page

This will be the home page of the app. It will also act as a dashboard where users can receive relevant updates/notifications and take action

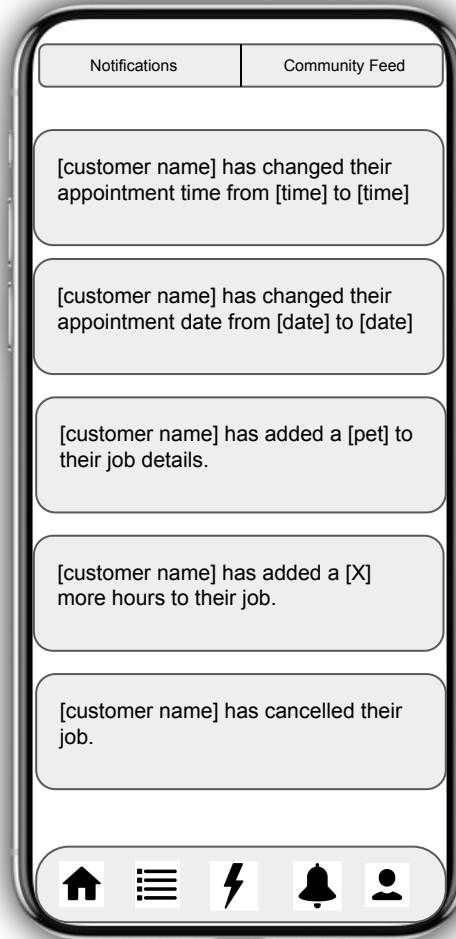


Notifications Page

This page will allow users to see relevant notifications as well as check out The Home Team news feed which will have relevant post and content that users can engage in and interact with.

Rules:

- Only updates that could potentially change a team members schedule or affect their work environment are placed in the notifications page.
 - Start time
 - Number of hours
 - Date change
 - Cancellations
 - Pets
- All notifications must be cleared by the end of the day by swiping right to accept or swiping left to place swap request.
- Clicking on an appointment will open up the shift details



Community Feed

On this page users will be able to see and engage with Home Team posts by other customers and team members.

Upon the team member selecting the plus button they can create a post

Rules:

- Feed is available for up to 30 days worth of posts
- City is based off of the city user has identified themselves in
- Tags are taken from the tag section when images are posted
- Comments are public



Community Feed Posting Process

User will choose an image and click next



Community Feed

- User will then write a caption and select a predetermined tag(s) to their posting



END

4. Notifications & Community Feed

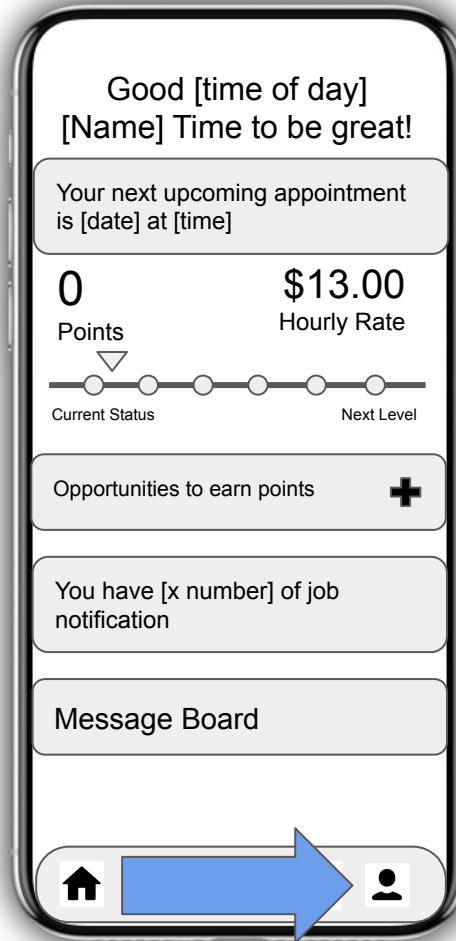
Team Member App

5. Profile & Settings

Team Member App

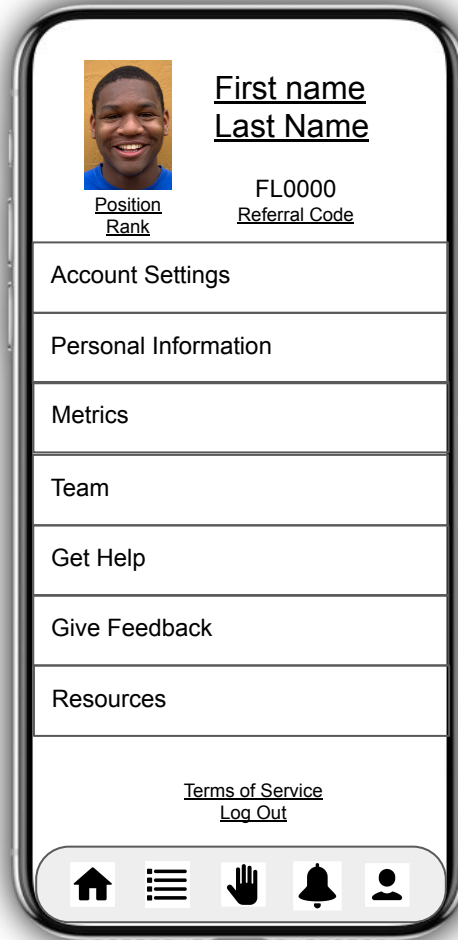
Home Page

This will be the home page of the app. It will also act as a dashboard where users can receive relevant updates/notifications and take action



User Profile & Settings

From this page a user can manage their profile, personal information and communicate with corporate.



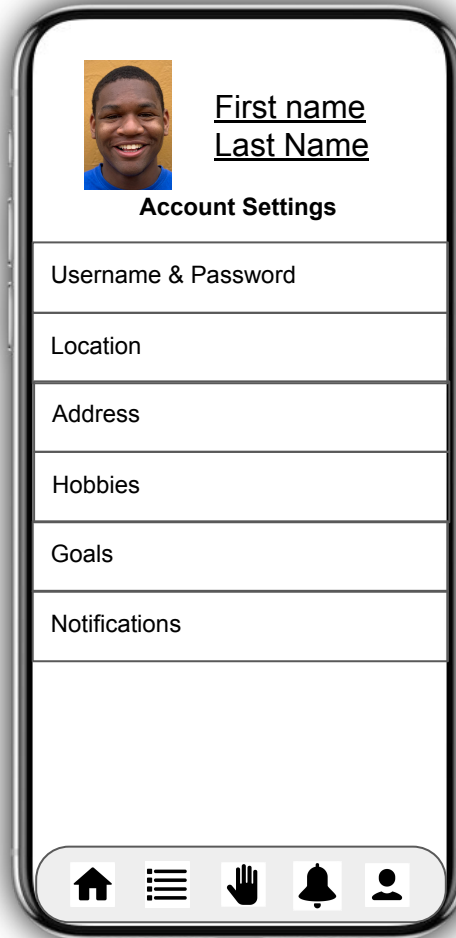
Account Settings

Team Member

Account Settings

On this page a user can edit username, password and additional information by selecting the indicated area.

- Username and password,
 - General page to update username and password
- Location
 - Page where team member can select what location they want to receive and see job notifications
- Address
 - User can view and update personal shipping address
- Hobbies
 - User can update hobbies
- Goals
 - User can update goals
- Notifications
 - User can determine notifications received and type

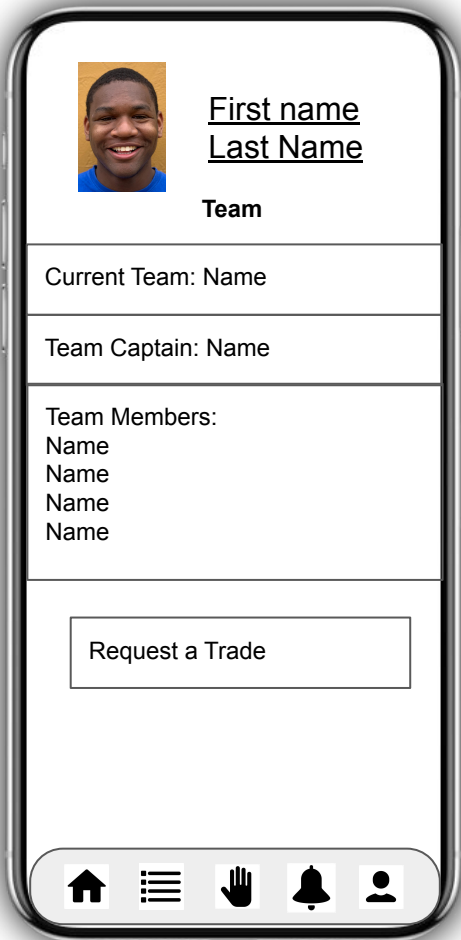


Team

Team Member

Account Settings

On this page a user can view what team they are on, see it's Captain and see other team members. Team members can request a trade at anytime.

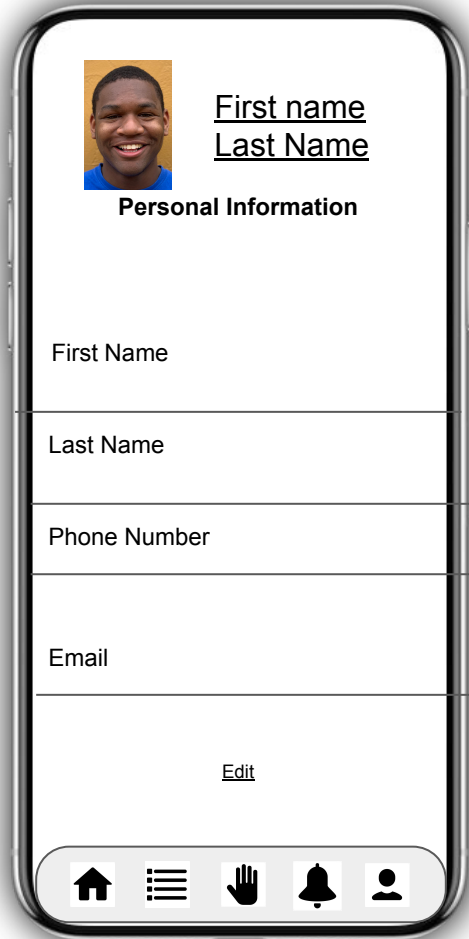


Personal Information

Team Member

Personal Information

From this page a user can update their personal information. By clicking “edit” all information becomes editable. “Edit” turns into “save” when editing information. Once information is saved, page goes back to original settings with updated information.








A smartphone mockup displaying a 'Personal Information' form. At the top left is a square profile picture of a smiling man. To its right, the labels 'First name' and 'Last Name' are underlined. Below these is the title 'Personal Information'. The form consists of four text input fields labeled 'First Name', 'Last Name', 'Phone Number', and 'Email'. At the bottom of the form is an underlined 'Edit' button. The phone's home indicator bar at the very bottom contains five icons: a house, a list, a hand, a bell, and a person.



First name
Last Name

Personal Information

Edit



Metrics

Team Member

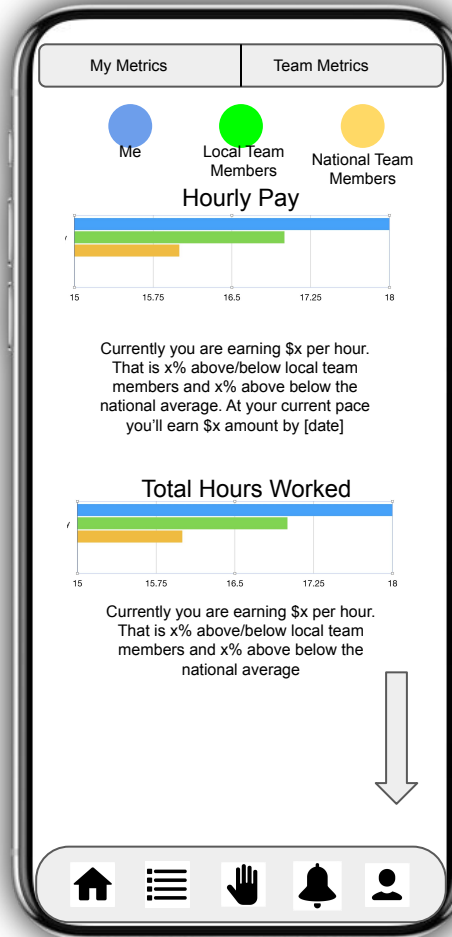
Metrics Page

On this page a user will be able to see their metrics compared to local and national team members. Metrics will include:

- Total Earnings*
 - 0-12,000
- Total Hrs Worked
 - 0-6000
- Total Shifts Completed*
 - 0-900
- Total Points Earned
 - 0-100000
- Current Hourly Rate
 - 13-22
- Team Rating
 - 0-5
- Customer Rating
 - 0-5
- Overall Rating*
 - 0-5
- Total Points Lost
 - 0-30000

Metrics with stars will have a summary sentence indicating when they are likely to hit a milestone.

User can also see exact same stats from a team metrics view as indicated above.

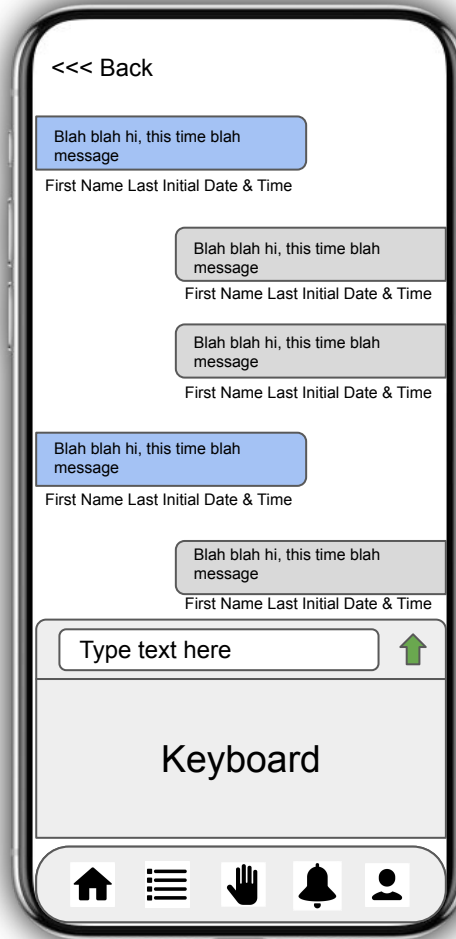


Get Help

Team Member

Get Help

The Get Help page will take a user to a live chat page if available. If not, user will be taken to a general “contact us” page where they can submit their inquiry. There will also be a link to our FAQs page found on our website.



Get Help

The Get Help page will take a user to a live chat page if available. If not, user will be taken to a general “contact us” page where they can submit their inquiry. There will also be a link to our FAQs page found on our website.

The image shows a smartphone screen with a 'CONTACT US' form. The form has a title bar with a close button (X). Below the title, there is a message: 'Please fill out this form to contact us and we'll get back to you right away!'. The form contains four input fields: 'NAME:', 'EMAIL:', 'PHONE NUMBER:', and 'MESSAGE:'. Below the 'MESSAGE:' field is a green 'Send Message' button. At the bottom of the screen, there is a white bar with the text 'FAQs' and a bottom navigation bar with five icons: a home icon, a list icon, a hand icon, a bell icon, and a person icon.

CONTACT US

Please fill out this form to contact us and we'll get back to you right away!

NAME:






EMAIL:

PHONE NUMBER:

MESSAGE:

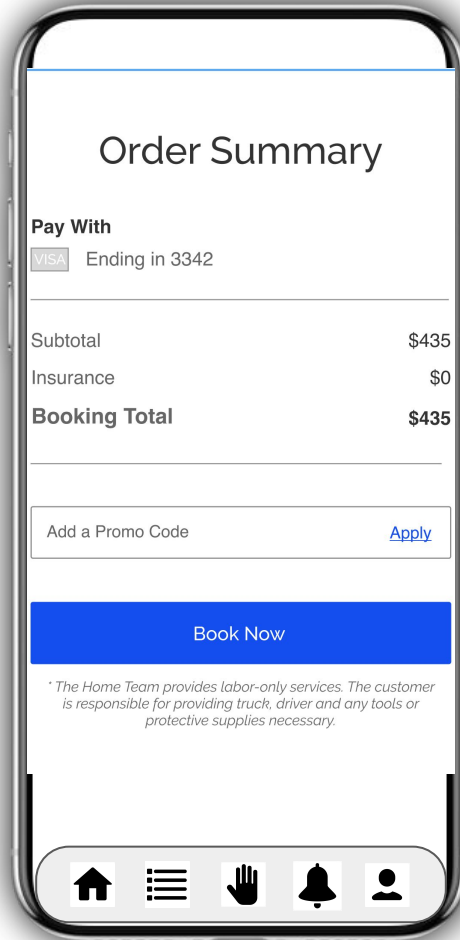
Send Message

FAQs



Get Help

The Get Help page will take a user to a live chat page if available. If not, user will be taken to a general “contact us” page where they can submit their inquiry. There will also be a link to our FAQs page found on our website.

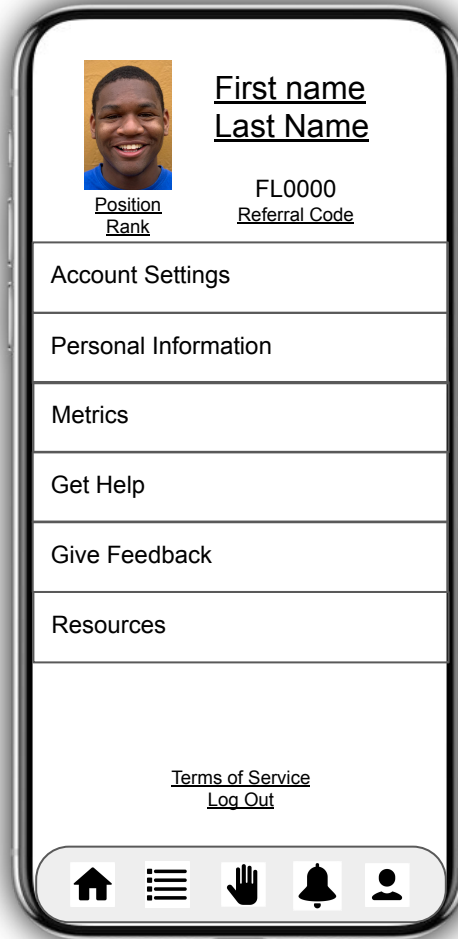


Feedback


Team Member






Feedback Page

When a user selects the feedback option, a typeform will populate within the app.



The image shows a mobile application interface. At the top, there is a user profile section with a circular profile picture of a man. To the right of the picture are labels for 'First name' and 'Last Name', both underlined. Below the picture are labels for 'Position' and 'Rank', also underlined. To the right of these labels is the text 'FL0000' and the label 'Referral Code', which is underlined. Below this section is a menu with six items: 'Account Settings', 'Personal Information', 'Metrics', 'Get Help', 'Give Feedback', and 'Resources'. At the bottom of the screen, there are five icons: a house, a list, a hand, a bell, and a person. Above the bottom icons, there are two underlined links: 'Terms of Service' and 'Log Out'.

	<u>First name</u> <u>Last Name</u>
<u>Position</u> <u>Rank</u>	FL0000 <u>Referral Code</u>
Account Settings	
Personal Information	
Metrics	
Get Help	
Give Feedback	
Resources	
<u>Terms of Service</u> <u>Log Out</u>	

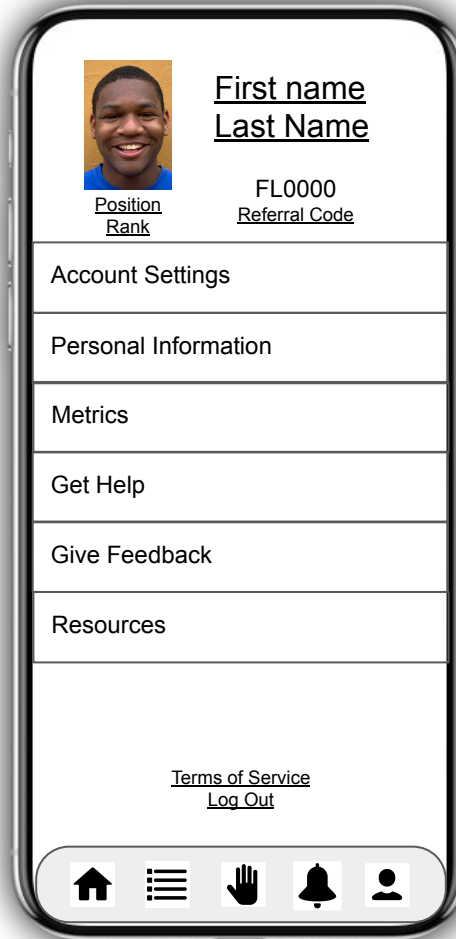


Resources

Team Member

Resources Page

When a user selects the resources option, they will be redirected to a webpage that has links to all resources.



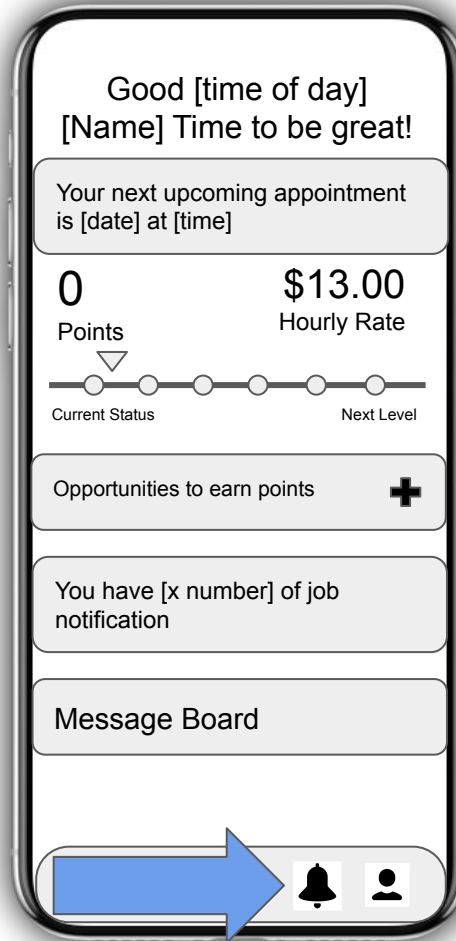
END

5. Profile & Settings

Team Member App

Notification and Feed Page

Clicking the indicated icon will take user to the notifications and team feed page



Pre-Shift Acknowledgement

Team Member

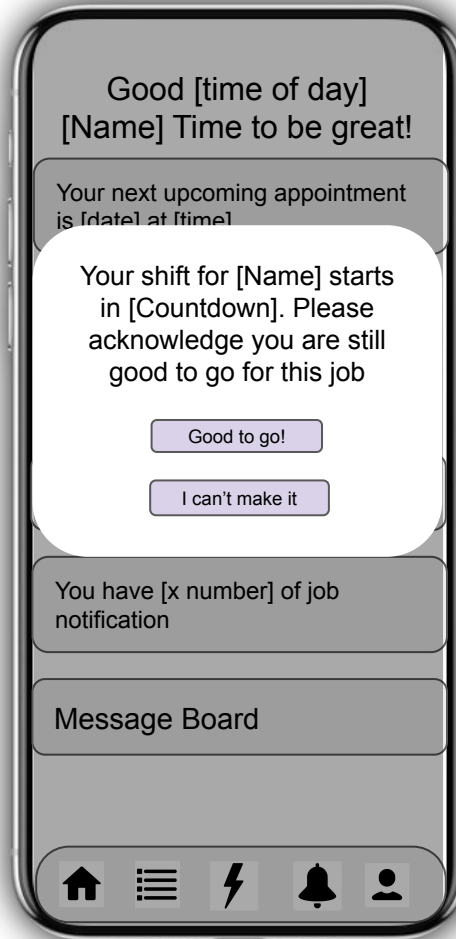
Pre-Shift Acknowledgement

One hour prior to a shift, team members must acknowledge they will still be participating on the shift. This is done by an acknowledgement message that auto populates an hour before the job.

Upon opening the app this is the only screen a team member is able to see until they indicate if they will be on shift or not.

Rules

- If they indicate yes, nothing else is done.
- If they indicate no, or do not indicate within 30 minutes of shift, the shift is sent to all available workers in the area for them to accept.

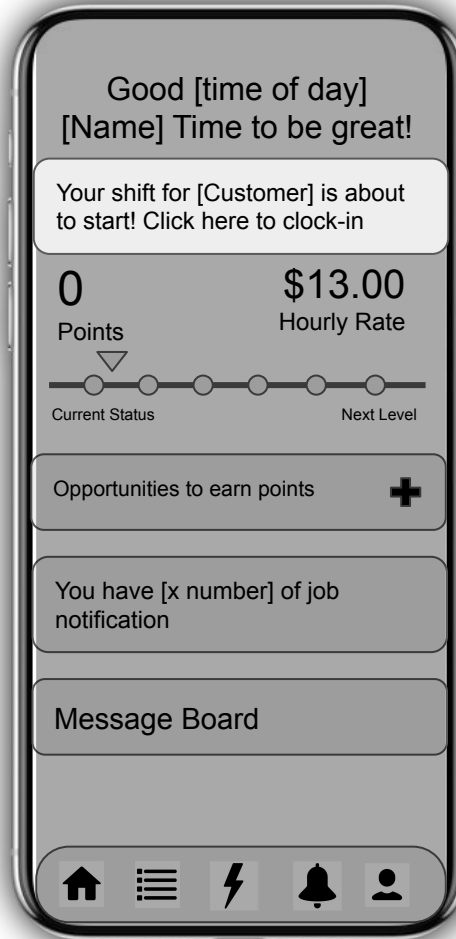


Pre-Shift Flow

Team Leader

Pre-Shift Acknowledgement

Team member is able to access upcoming shift from home page or shift list page.

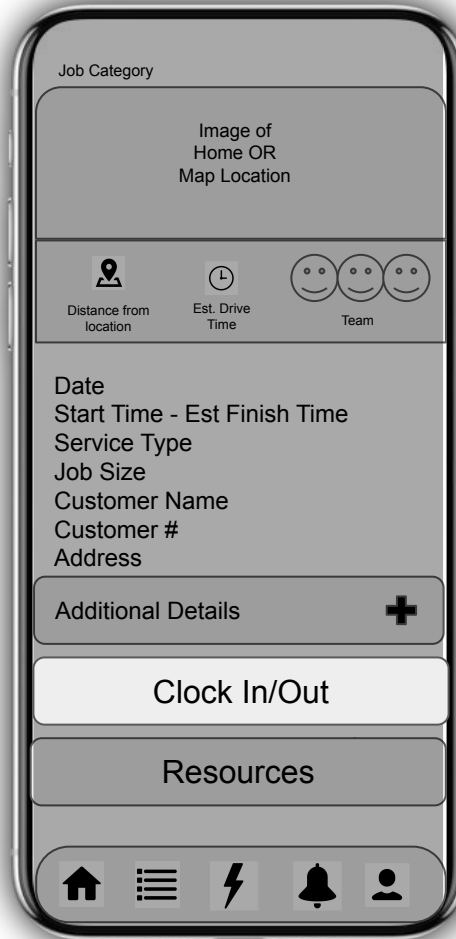


Clocking In

Team leaders will see a button to clock in 30 minutes prior to the start of a shift. This will be a floating button that is above the resources button.

Rules:

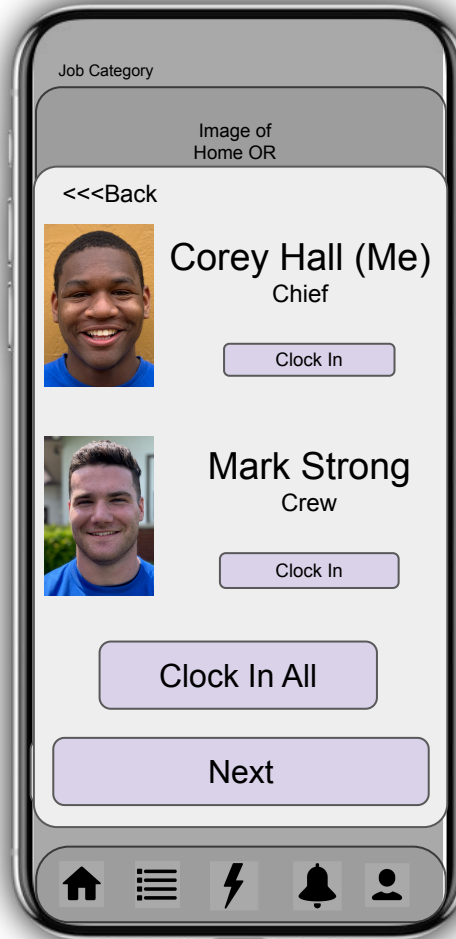
- If team leader is not clocked in 5 minutes prior to shift, option appears for general team members to clock in Upon clicking the clock-in.



Clocking In (Cont'd)

Once team leader clicks “clock-in”, modal pops up. This modal allows option for team leader to clock in each team member (including themselves).

- Once team leader clocks team member in, “clock-in” option changes to “clock-out”
- If all team members are present, team leader can simply click “Clock In All” option.
- In order to exit modal, team member will hit “back” button



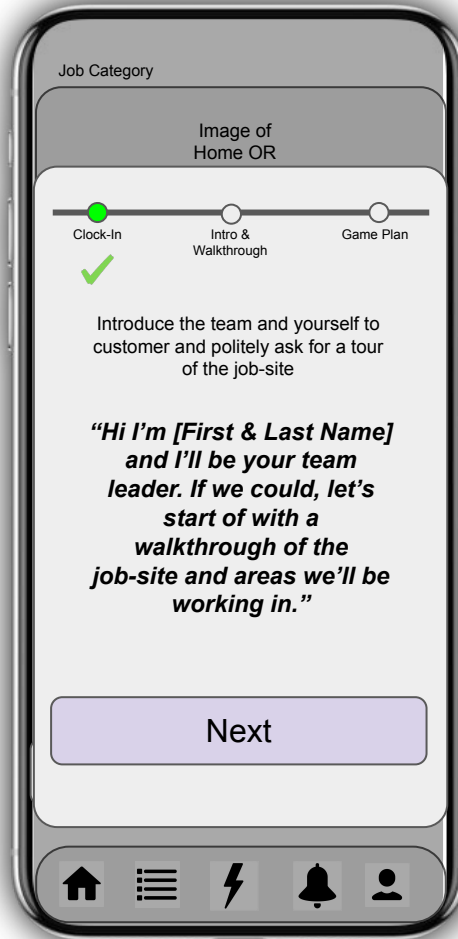
Pre-Shift Form

Once team member(s) have been clocked in, team leader begins the pre-shift form.



Intro & Walkthrough Instructions

Team Leader will see a brief script. Once introduction script has been read, team leader will move on to next prompt.

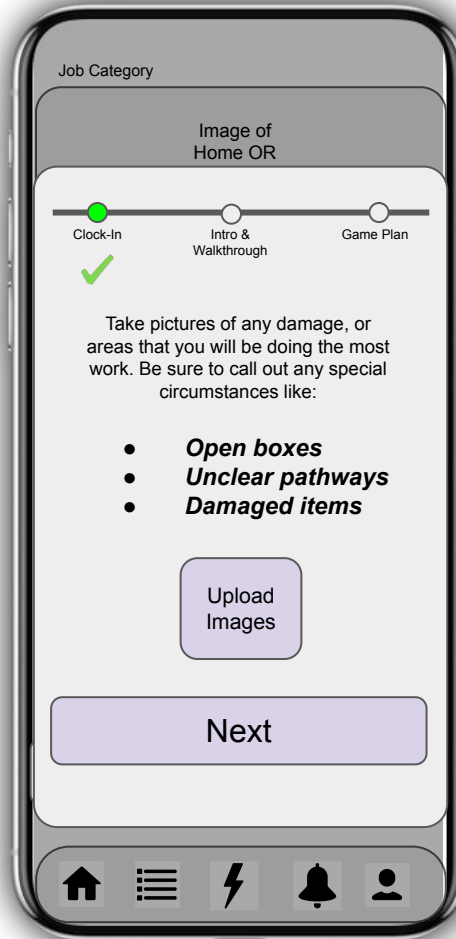


Intro & Walkthrough Instructions (cont'd)

As walkaround is happening, team member will be able to snap photos of job-site and upload to job-profile.

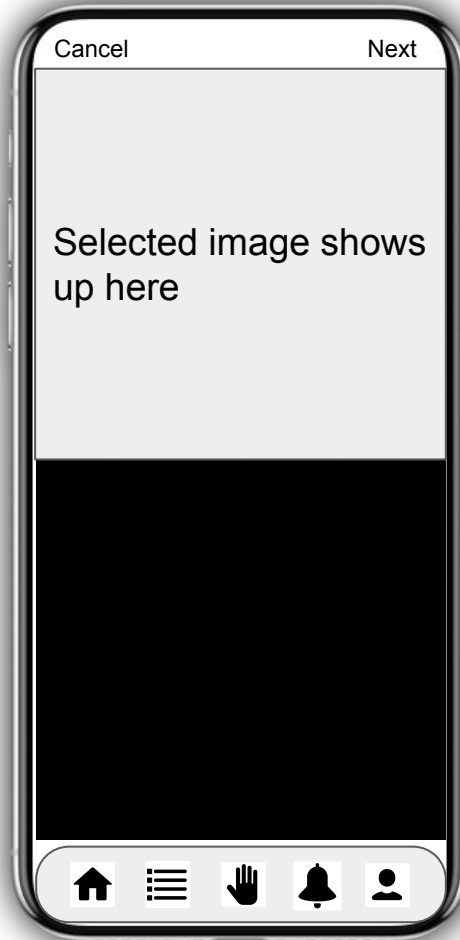
Rules:

- Unlimited images can be uploaded



Intro & Walkthrough Instructions - Uploading Images

Prompt for team leader when uploading images

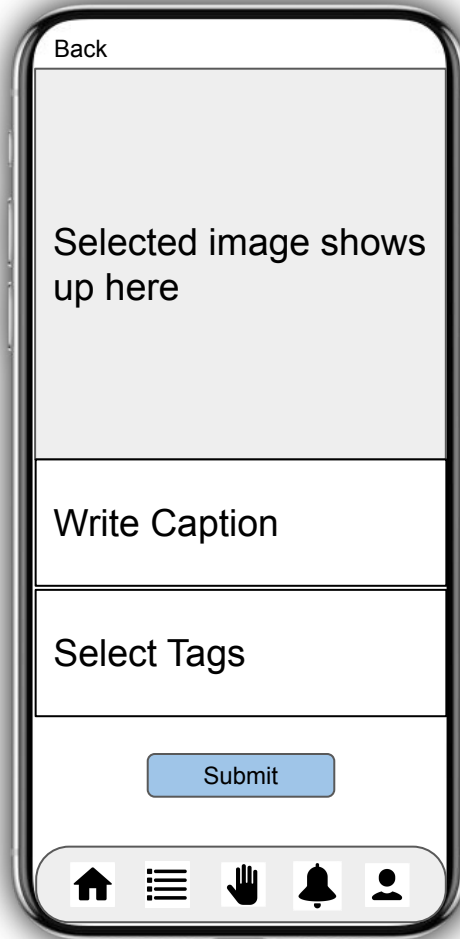


Intro & Walkthrough

Instructions - Uploading Images (cont'd)

Team Leader can write description about the image or area. Tags will include:

- Furniture
- Room
- Truck
- Unprepared
- Damage
- Additional requests



A mobile app interface for uploading images. The screen is divided into several sections. At the top is a 'Back' button. Below it is a large gray rectangular area labeled 'Selected image shows up here'. Underneath this is a white rectangular area labeled 'Write Caption'. Below that is another white rectangular area labeled 'Select Tags'. At the bottom of the main content area is a blue button labeled 'Submit'. At the very bottom of the screen is a navigation bar with five icons: a house, a list, a hand, a bell, and a person.

Back

Selected image shows up here

Write Caption

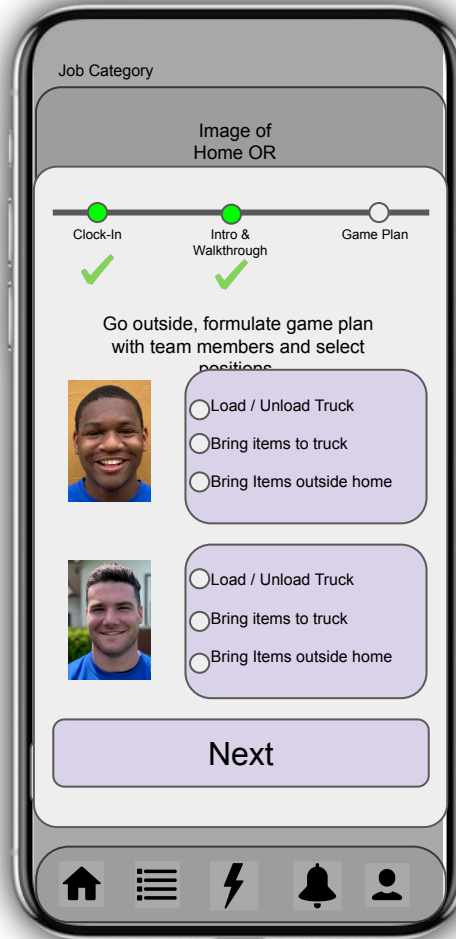
Select Tags

Submit

Home List Hand Bell Person

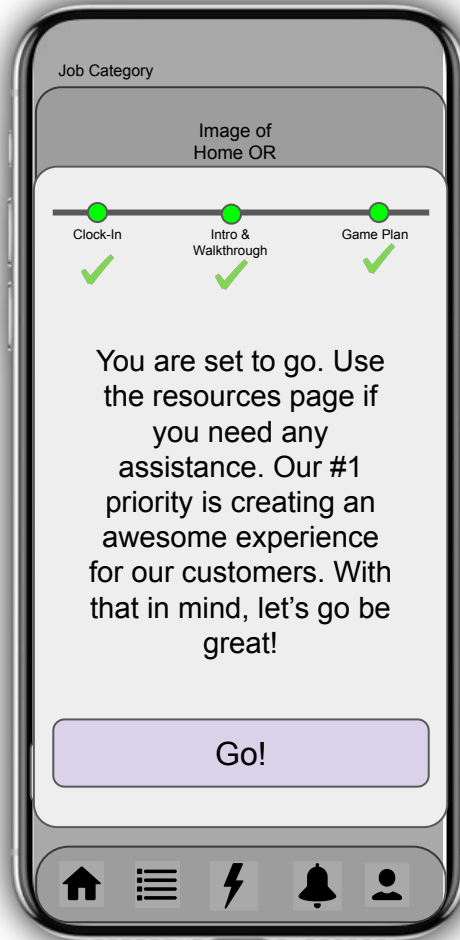
Game Plan Instructions

Once team leader has taken appropriate pictures and completed walk through, they will then choose which team members will perform what tasks. Multiple tasks can be assigned to one team member.

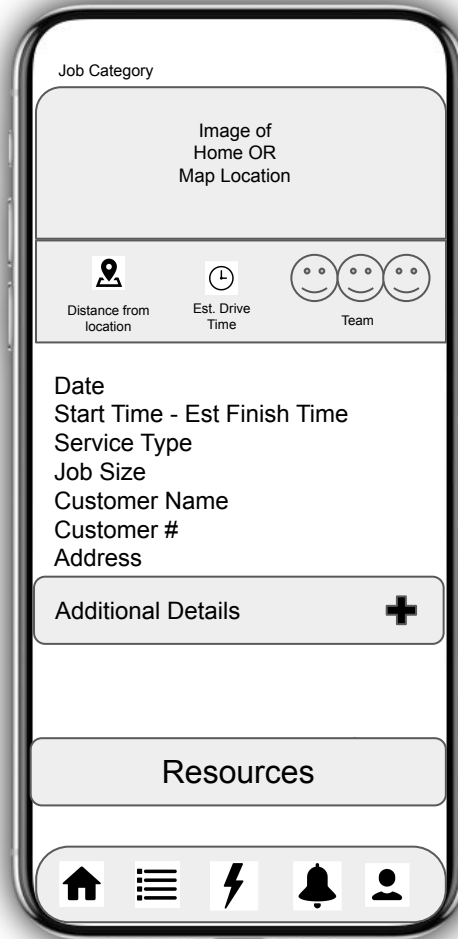


Conclusion of Pre-Shift Walkthrough

After team members are selected, pre-shift form is complete.



Inside a shift (assigned)



Pre-Shift Flow End

Team Leader

Clocking Out Post Shift

Once a shift is complete, team leader will clock out to begin job completion process

The image shows a mobile application interface for clocking out after a shift. The screen is divided into several sections. At the top, there is a 'Job Category' label. Below it is a large rectangular area for an 'Image of Home OR Map Location'. Underneath this is a row of three icons: a location pin, a clock, and three smiley faces. Below these icons are the labels 'Distance from location', 'Est. Drive Time', and 'Team'. The next section contains a list of text fields: 'Date', 'Start Time - Est Finish Time', 'Service Type', 'Job Size', 'Customer Name', 'Customer #', and 'Address'. Below these fields is a button labeled 'Additional Details' with a plus sign icon. The bottom of the screen features three large buttons: 'Clock In/Out', 'Resources', and a bottom navigation bar with five icons: a home icon, a list icon, a lightning bolt icon, a bell icon, and a person icon.

Job Category

Image of
Home OR
Map Location

Distance from
location

Est. Drive
Time

Team

Date
Start Time - Est Finish Time
Service Type
Job Size
Customer Name
Customer #
Address

Additional Details +

Clock In/Out

Resources

Home, List, Lightning Bolt, Bell, Person icons

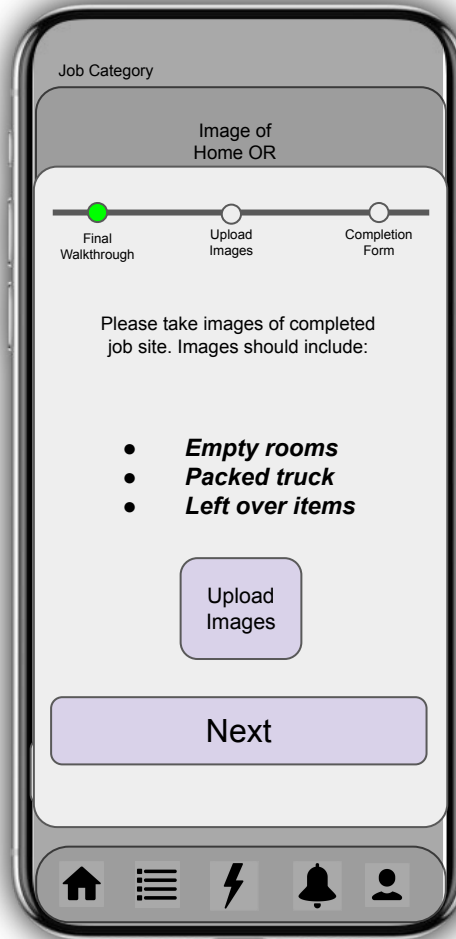
Outro & Walkthrough Instructions

Prompt which is shown after team leader selects
clock out



Outro & Walkthrough Instructions (cont'd)

Prompt shown after script message. Team member will take pictures and upload images of completed areas



Outro & Walkthrough Instructions - Uploading Images

Process for team member to select or take
images of indicated areas



Outro & Walkthrough

Instructions - Uploading Images (cont'd)

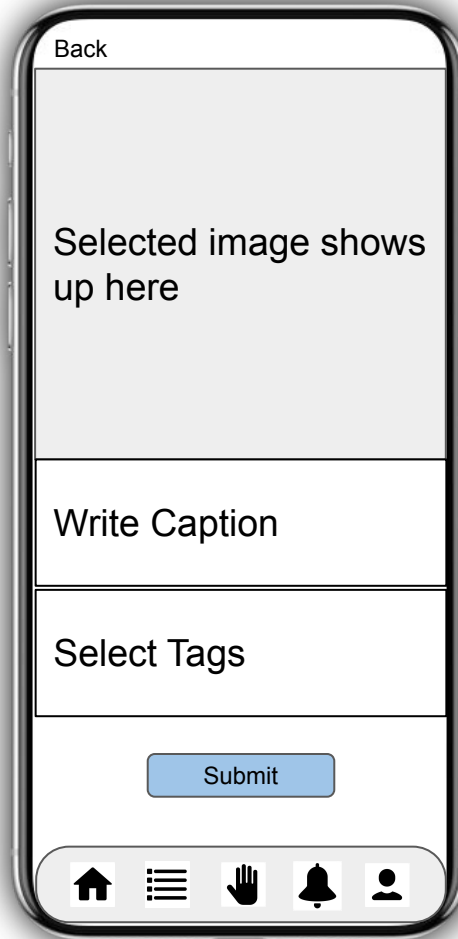
Uploading of images.

Caption will be a comment specific to the image.

Tags will be as follows:

- Inside truck
- Empty room
- Leftover items
- Chair
- Table
- Couch
- Tv Stand
- Pictures
- Misc.

Team member is able to select multiple tags per image.



A mobile app interface for uploading images. The screen is divided into several sections. At the top is a 'Back' button. Below it is a large grey rectangular area labeled 'Selected image shows up here'. Underneath this is a white rectangular area labeled 'Write Caption'. Below that is another white rectangular area labeled 'Select Tags'. At the bottom of the main content area is a blue button labeled 'Submit'. At the very bottom of the screen is a navigation bar with five icons: a house, a list, a hand, a bell, and a person.

Back

Selected image shows up here

Write Caption

Select Tags

Submit

Home List Hand Bell Person

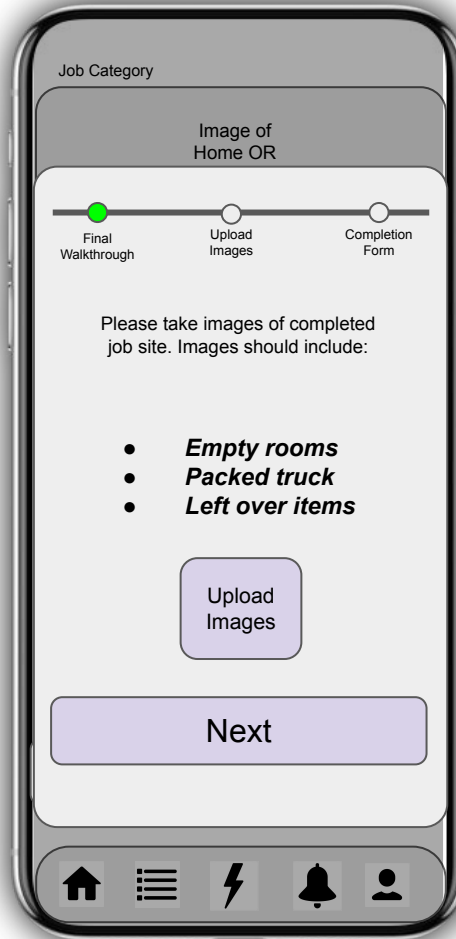
Outro & Walkthrough Instructions (cont'd)

Once images are uploaded team member will be taken to original uploading screen.

Uploaded images will appear above the next button so team member can view preview of small images

Once images are completely uploaded team member can hit next.

- Team leader must take at least three images in order for next button to appear.



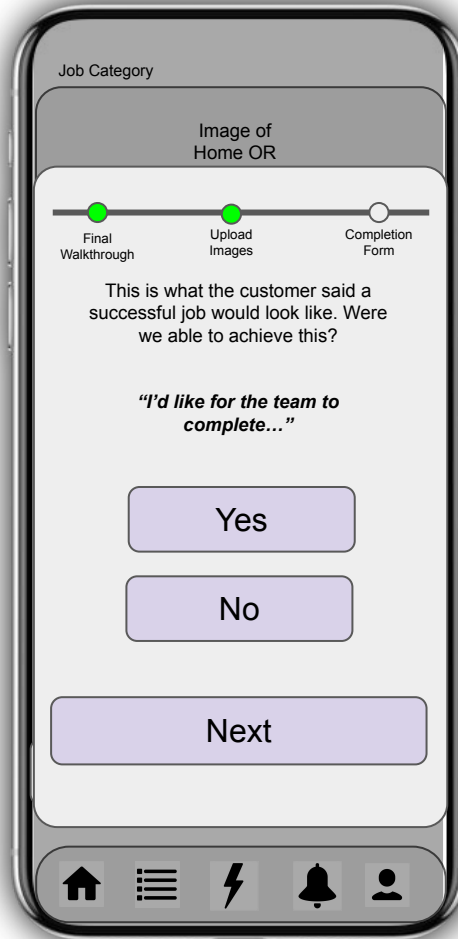
Outro & Walkthrough Instructions (cont'd)

If customer has (MH) tag, team member must request payment code from customer.

- Collected payment codes go into the job profile of the customer.
- Once code is entered “next” button can be selected.
- “Click Here” link will take you to a brief instruction page. (Not a current priority)

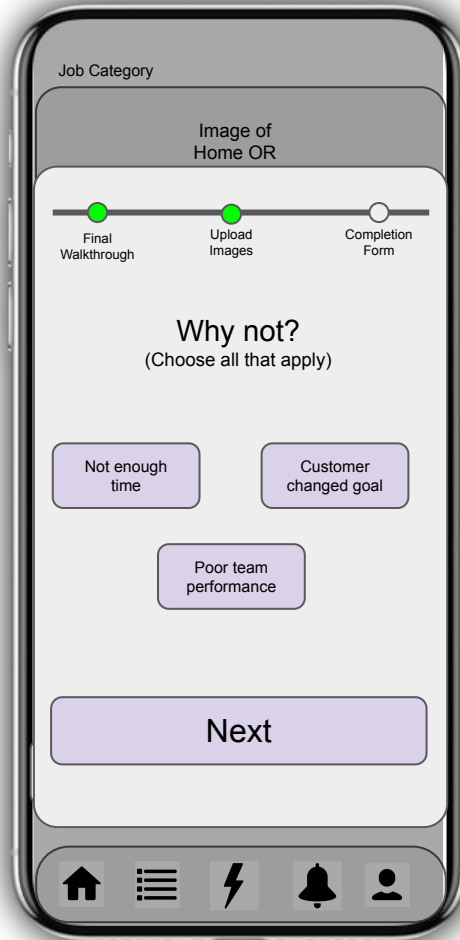
The screenshot shows a mobile application interface for a job category. At the top, it says "Job Category". Below that is a section titled "Image of Home OR". A progress bar with three dots indicates the current step: "Final Walkthrough" (green dot), "Upload Images" (green dot), and "Completion Form" (white dot). The main content area contains the text: "Please collect payment code from customer. Ask customer for 6-digit payment code provided by U-Haul. [Click here](#) if they need help." Below this text is a light purple input field with the placeholder text "Enter here...". At the bottom of the main content area is a large light purple button labeled "Next". The bottom of the screen features a navigation bar with five icons: a home icon, a list icon, a lightning bolt icon, a bell icon, and a person icon.

Outro & Walkthrough Instructions (cont'd)



Outro & Walkthrough Instructions (cont'd)

If team member indicates that we were unable to complete a shift successfully. They will be taken to the following page.



Outro & Walkthrough Instructions (cont'd)

In order to clock a team member out the team leader must rate the team member and choose a brief description of why they rated them as follows. This will be repeated for and by all team members


- If team member is given less than 5 stars, secondary options appear as shown on the next screen.
- Team member must give star rating and indicate at least one reason why.
- Depending on a star rating, team member will have a specific label shown Team label based off of star rating:
 - 5 Star: All-Star
 - 4 Star: Team Player
 - 3 Star: Work in Progress
 - 2 Star: Bench Worthy
 - 1 Star: Trade Em

Job Category

Image of Home OR

Final Walkthrough Upload Images Completion Form

Please Rate Team Member
(Choose all that apply)


 ★ ★ ★ ★ ★

All-Star

Hard Worker Professional

Knowledgeable Communication

Helpful Courteous

 Leave a comment

Next

Home Menu Lightning Bolt Notifications Profile

Outro & Walkthrough Instructions (cont'd)

Options shown if team member receives less than 5 stars

Job Category

Image of Home OR

Final Walkthrough Upload Images Completion Form

Please Rate Team Member
(Choose all that apply)

Trade Em

Lazy Unprofessional

Not Helpful Communication

Unknowledgeable Inconsiderate

Leave a comment

Next

Outro & Walkthrough Instructions (cont'd)

Team leader must also rate customer after clocking out.

- If customer is given less than 5 stars, secondary options appear as shown on the next screen.
- Team member must give star rating and indicate at least one reason why.
- Depending on a star rating, customer will have a specific label shown
Customer label based off of star rating (yes same as team members):
 - 5 Star: All-Star
 - 4 Star: Team Player
 - 3 Star: Work in Progress
 - 2 Star: Bench Worthy
 - 1 Star: Trade Em

Job Category

Image of Home OR

Final Walkthrough Upload Images Completion Form

Please Rate Customer
(Choose all that apply)

☆☆☆☆☆

Love'em

Prepared Courteous

Communication Considerate

Organized Professional

+ Leave a comment

Next

Home Menu Lightning Bolt Notifications Profile

Outro & Walkthrough Instructions (cont'd)

Options shown if customer receives less than 5 stars

The screenshot displays a mobile application interface for a customer rating screen. At the top, there is a header with the text "Job Category" and a placeholder "Image of Home OR". Below this is a progress bar with three steps: "Final Walkthrough" (indicated by a green dot), "Upload Images" (indicated by a green dot), and "Completion Form" (indicated by a white dot). The main heading is "Please Rate Customer" with the instruction "(Choose all that apply)". Below the heading is a five-star rating system, with all five stars currently unselected. Underneath the stars is the text "Leave'em". A grid of six purple buttons with white text lists potential reasons for a low rating: "Unprepared", "Rude", "Communication", "Unrealistic", "Disorganized", and "Unprofessional". Below these buttons is a text input field with a plus icon and the placeholder text "Leave a comment". At the bottom of the form is a large purple button with the text "Next". The bottom of the screen features a navigation bar with five icons: a home icon, a list icon, a lightning bolt icon, a bell icon, and a user profile icon.

Job Category

Image of Home OR

Final Walkthrough Upload Images Completion Form

Please Rate Customer
(Choose all that apply)

★ ★ ★ ★ ★

Leave'em

Unprepared Rude

Communication Unrealistic

Disorganized Unprofessional

+ Leave a comment

Next

Home List Lightning Bolt Bell User

Outro & Walkthrough Instructions (cont'd)

Team Leader will complete lifemode of customer profile. They will select all relevant tags for that customers lifemode.

- Information will be placed in customer profile.
- Next will be chosen after team member selects at least three tags

The screenshot shows a mobile application interface for completing a customer profile. At the top, there is a header 'Job Category' and a section 'Image of Home OR'. Below this is a progress bar with three steps: 'Final Walkthrough' (completed, green dot), 'Upload Images' (completed, green dot), and 'Completion Form' (in progress, white dot). The main heading is 'Please Select Lifemode of Customer' with the instruction '(Choose all that apply)'. There are ten selectable tags arranged in two columns: Male, Female, Single, Married, Apartment, Yard, Kids, New Furniture, Home, and Married. Below the tags is a text input field with a plus icon and the placeholder 'Leave a comment'. At the bottom is a large 'Next' button. The bottom navigation bar contains icons for Home, Menu, Power, Notifications, and Profile.

Job Category

Image of Home OR

Final Walkthrough Upload Images Completion Form

Please Select Lifemode of Customer
(Choose all that apply)

Male Female

Single Married

Apartment Yard

Kids New Furniture

Home Married

+ Leave a comment

Next

Home Menu Power Notifications Profile

Outro & Walkthrough Instructions (cont'd)

After lifemode is indicated, team leader will type a personalized message to the customer. “Next” option will appear once a message has been typed.

This message will go into the customer profile and will be used to send customer follow-up email/postcard.

The image shows a mobile app interface for a walkthrough step. At the top, there is a header "Job Category" and a sub-header "Image of Home OR". Below this is a progress bar with three steps: "Final Walkthrough" (indicated by a green dot), "Upload Images" (indicated by a green dot), and "Completion Form" (indicated by a white dot). The main content area contains the text "Please leave a personalized message to customer" in bold, followed by a subtext: "Customer will receive this message in a postcard so make it relevant and personal to their experience. Mention their pet, kids, new job etc." Below this is a text input field with the placeholder "Write message here...". At the bottom of the main content area is a purple button labeled "Next". The bottom of the screen features a navigation bar with five icons: a home icon, a list icon, a lightning bolt icon, a bell icon, and a person icon.

Job Category

Image of Home OR

Final Walkthrough Upload Images Completion Form

Please leave a personalized message to customer

Customer will receive this message in a postcard so make it relevant and personal to their experience. Mention their pet, kids, new job etc.

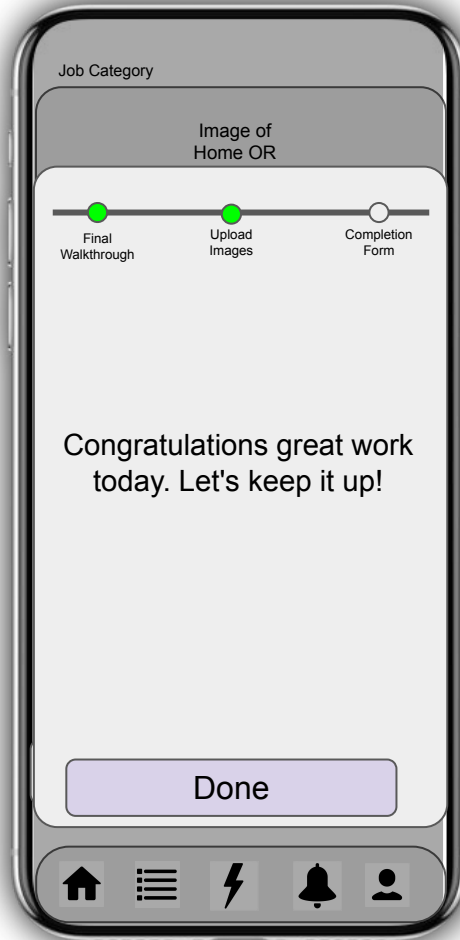
Write message here...

Next

Home List Lightning Bolt Bell Person

Outro & Walkthrough Instructions (cont'd)

Once prompts are complete user will see completion message. Upon clicking done, user will be taken to home screen of app.



Post-Shift Flow

Team Leader

Pre-Shift Flow End

Team Leader

Calendar Page - Go Live scheduling

- By clicking the lightning bolt icon in the corner, team members can access the “Go Live Now” feature.

