IT Project Management Office

HHG/Residential Customer App

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Ver. 5.0

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1. INTRODUCTION

1.1. Document Purpose

The purpose of this document is to communicate business and technical requirements for the first phase of the HHG/Residential Customer Portal, define the project structure, and document the approval by appropriate stakeholders.

1.2. Project Goal

To empower customers with the authority, opportunity, and ability to make and manage important moving decisions. The phased approach of this project will impact near-term revenue and long-term relationships by providing a new channel of moving services driven by customer preference. This phase of the HHG/Residential Customer Portal will serve as the initial step of making most of the current administrative functions paperless, allowing customers to use their mobile device to review move-related paperwork, confirm receipt and acknowledgement of documents, submitting initial deposits and final payments. This phase of the HHG/Residential Customer Portal will also send notifications to the customer, as well inside and outside sales representatives alerting them to upcoming actions and/or required tasks.

2. HIGH LEVEL BUSINESS REQUIREMENTS

2.1 Must blend with existing design and functionality of jkmoving.com and its sub-sites
2.2 Application for iOS and Android
2.3 Generate and assign unique customer identification numbers
- 2.3.1 Require assigned unique customer number to access HHG/Residential Customer Portal
- 2.3.2 6-digit code
- 2.3.3 Code used for first access, password required afterward

2.4 Ability for customer to review and acknowledge receipt of their ‘Move Estimate’ and ‘Move-Related Paperwork’
- 2.4.1 Customer will see all estimates created and confirm one

2.5 Submit payment and return confirmation notification thereof
2.6 Submit edits, updates and change requests for the move-related details
2.7 Immediate status updates to customer via Push communication by method identified as ‘Preferred’
2.8 Show Summary Dashboard, including:
- 2.8.1 ‘Move Dates’
- 2.8.2 ‘Move Services’
- 2.8.3 ‘What Matters Most’
- 2.8.4 ‘Valuation’
- 2.8.5 ‘Alerts’
- 2.8.6 ‘Payments’

2.9 Additional information to show:
- 2.9.1 Ability to view ‘My Team’
- 2.9.2 Ability to view ‘My Documents’
- 2.9.3 Ability to contact JK Representative when needed (‘Contact Us’)

3. Wireframe/Pane Requirements

3.1. Summary
- 3.1.1. 'Move Details'
- 3.1.2. 'What Matters Most'
- 3.1.3. 'Valuation'
- 3.1.4. 'Alerts'
- 3.1.5. 'Payments'

3.2. My Account
- 3.2.1. Name
- 3.2.2. Phone Number
- 3.2.3. Email
- 3.2.4. Identification of Preferred Method of Contact

3.3. My Team
3.4. My Documents
3.5. Payments
3.6. Contact Us

4. Business Requirements

4.1. The system shall generate a unique verification code that will be delivered to the customer with instructions to download the application and login
4.2. The system will show all estimates generated for the customer
4.3. The system will allow the customer to choose one (1) estimate and confirm the associated details
4.4. The system will allow the customer to review and acknowledge 'Move-Related Paperwork'
4.5. The system shall have a way for the customer to submit edits, updates and change requests of move-related details prior to their Move Date
4.6. The system will send notifications of key timeline events:
- 4.6.1. Are you ready?
- 4.6.2. Valuation (if none selected)
- 4.6.3. 'Morning of' check in
- 4.6.4. 'End of day' check in
- 4.6.5. Request Help/Assistance

4.7. The system will save the action alerts as notifications as 'Tasks' in JIM
4.8. The system will walk the customer through necessary paperwork (see workflow, section 12):
- 4.8.1. Estimate
  - 4.8.1.1. Confirmation of Services
  - 4.8.1.2. Move Dates
  - 4.8.1.3. Address (Origination and Destination)
- 4.8.2. Vital Information
  - 4.8.2.1. What Matters Most (WMM)
  - 4.8.2.2. Customer Rights and Responsibilities
- 4.8.3. Valuation

4.9. The system will require a deposit to be paid prior to booking an estimated move
- 4.9.1. Submitting a deposit will expand the functionality of the portal

4.10. Once 'Booked', the system will show the customer their 'Move Timeline'
4.11. Once 'Booked', the system functionality will expand to display 'What Matters Most'
4.12. Once 'Booked', the system functionality will expand to display 'Valuation'

4.13. Once 'Booked,' the system functionality will expand to display 'Alerts'
4.14. The system will give the customer the option to identify their preferred contact method

5. Functional Requirements

5.1. Privacy Statement
5.2. Log-In Code (6 digits) are sent in a Confirmation Email in addition to their HHG Estimate
5.3. Acceptance of 'Terms & Conditions' is required prior to using app
5.3.1. Payment agreement is included in 'Terms & Conditions'
5.4. 'Wizard' is available during the Confirmation workflow that provides users with an open text field to enter their changes, updates, and/or edits
5.4.1. If user has provided updates via Wizard during the Confirmation workflow, a notification email is sent to the Sales Representative and/or Move Coordinator to review and/or follow-up with the customer
5.5. Sales Representative can create multiple Sales Estimates
5.5.1. Sales Estimates will be sent to customer via 'Thank You Email'
5.5.1.1. 'Thank You Email' will include a 'Unique Customer Identification Number,' and instructions to download the Mobile Application
5.5.2. All estimates will be available within the Mobile Application
5.6. Reminder email is sent to Customer if 'Unique Customer Identification Number' is not activated within the Mobile Application within 48 hours of receipt
5.7. Customer will confirm their 'Booked' Estimate
5.8. Mobile Application will require the user to enter their 'Unique Customer Identification Number'
5.9. Entering the 'Unique Customer Identification Number' will open the 'Wizard' view of the Mobile Application
5.10. '**Dashboard'** view of the Mobile Application will display the following sections:
5.10.1. '**Alerts**'
5.10.1.1. 'Alerts' will be accessible from an icon located at the upper right corner of the dashboard
5.10.1.1.1. 'Alerts' icon will easily identify if new alerts are available
5.10.1.2. Users will be able to click on the 'Alerts' icon to display
5.10.1.2.1. 'Actionable' Alerts will require a user to take an action to complete a task
5.10.1.2.1.1. 'Actionable' Alerts can be removed from the list by swiping left to remove/delete alert from the list
5.10.1.2.2. 'Nonactionable' Alerts are informational notifications that do not have a task associated with it
5.10.1.2.2.1. 'Nonactionable' Alerts can be removed from the list by swiping left to remove/delete alert from the list
5.10.1.3. 'Clear All' functionality will be available to users to remove all Alerts
5.10.1.4. 'Alerts' can be viewed on a locked (and unlocked) screen from a user's mobile device
5.10.1.4.1. Receipt of 'Alerts' can be managed through the user's 'My Account'
5.10.2. '**Move Timeline**'
5.10.2.1. 'Move Timeline' will be available on the 'Dashboard' view
5.10.2.1.1. 'Move Timeline' will display the 'First Day of Service' on the left side and 'Move Date' on the right side
5.10.2.1.1.1. 'Move Timeline' will provide a countdown to 'Move Date' main screen of the mobile application and available <u>before</u>
5.10.3. **'Move Status'**

5.10.3.1. 'Move Status' will display an image of a JK branded truck travelling from the 'Origination Address' to the 'Destination Address' and provide a high-level status of the move for that calendar day

5.10.4. '**My Documents**'

5.10.4.1. 'My Documents' will contain all move-related documents

5.10.4.1.1. Users will receive an 'Alert' notifying them that action is required (if action has not been taken and deadline is within 24 hours

5.10.4.2. All Sales Estimates will be available within 'My Documents'

5.10.5. **'Move Details'**

5.10.5.1. 'Move Details' will be available throughout the 'Dashboard' view and is comprised of the following sections:

5.10.5.2. 'My Services' will display the selected services of the 'Confirmed Estimate'

5.10.5.3. 'What Matters Most' will display any areas and/or items that require special attention

5.10.5.4. 'Valuation' will display either default valuation or what was selected by the customer

5.10.5.5. 'Destination' and 'Origin' addresses will display as they are noted within the 'Confirmed Estimate'

5.10.6. '**My Team**'

5.10.6.1. First Name, Photo, and Contact Information is displayed for Sales Representative

5.10.6.2. First Name, Photo, and Contact Information is displayed for Move Coordinator

5.10.6.3. User can click to call and email both Sales Representative and Move Coordinator directly

5.10.7. '**Payments**'

5.10.7.1. User will make credit card payments through the mobile application

5.10.7.1.1. The application will return successful and denied transaction details

5.10.8. '**My Account**'

5.10.8.1. Backend system will pre-populate the following fields:

5.10.8.1.1. Name

5.10.8.1.2. Phone Number

5.10.8.1.3. Email

5.10.8.1.4. Identify preferred Contact Method

5.10.8.2. Users will be able to manage their Notification preferences from 'My Account'

6. System & Technological Requirements

6.1. Mobile Application Requirements

6.1.1. iOS

6.1.2. Android

6.2. Identity Management & Non-Functional Security Requirements

6.2.1. The Dashboard will provide access to all functionality provided within the Mobile Application

6.2.2. Initial login of the Mobile Application will require a 'Unique Customer Identification Number'

6.2.2.1. No failed login requirements for Phase 1

6.2.2.2. No lock out requirements for Phase 1

7. Data Sources & Integrations

7.1. JK System Integrations

7.1.1. The solution must integrate with JIM (MS Dynamics CRM Platform) for any details pertaining to HHG/Residential shipments

7.1.2. The solution must integrate with Great Plains/GP (MS Dynamics platform) to make payments
7.1.3. The solution must integrate with server-based SharePoint for move-related documents

8. Assumptions

8.1. Current sales process and procedures will remain in place
8.2. Development work will be done by a 3rd party vendor
8.3. Vendor will provide a level of effort (LOE) based off of functional requirements
8.4. HHG team will provide resources for testing
8.5. Out of Scope items will be further defined and prioritized for a future release

9. Out of Scope

9.1. Driver Application
9.2. Claims Process throughout Application
9.3. In-App Video Survey Feature
9.4. Customer Self-Survey
9.5. Real Time Utilization
9.6. Live Chat
9.7. Operations Portal
9.8. Promotional Code Application
9.9. Scope of Services for 3rd Parties
9.10. Uploading Documents to the Application
9.11. After-Hour Guidance/Instructions
9.12. Hours of Operation for Move Coordinators and Sales Representatives
9.13. Integration with People.net

10. Notifications/Alerts

10.1. Pre-move Confirmation
10.1.1. Are You Ready
10.1.1.1. 1st notification - 5 days out from first day of service
10.1.1.1.1. If Yes – proceed, record in JIM
10.1.1.1.2. If No – text box opens, notification sent to Move Coordinator, recorded in JIM
10.1.1.1.3. No response – nothing happens
10.1.1.2. 2nd notification – 4 days out from first day of service
10.1.1.2.1. If Yes – proceed, record in JIM
10.1.1.2.2. If No – text box opens, notification sent to Move Coordinator, recorded in JIM
10.1.1.2.3. No response – nothing happens
10.1.1.3. 3 days out from first day of service (no notification sent)
10.1.1.3.1. If Yes – proceed, record in JIM
10.1.1.3.2. If No – text box opens, notification sent to Move Coordinator, recorded in JIM
10.1.1.3.3. No response – becomes a activity in JIM for Move Coordinator
10.2. Day of Service Check-in (sent every day of services)
10.2.1. Is everything okay?
10.2.1.1.1. If Yes – proceed, record in JIM

10.2.1.1.2. If No – text box opens, notification sent to Move Coordinator, recorded in JIM

10.2.1.1.3. No response by 12:00/noon, day of service – becomes activity for Move Coordinator in JIM

10.3. End of Day Check-in

10.3.1. Did everything go okay? (sent only on the last day of services)

10.3.1.1.1. If Yes – proceed, record in JIM

10.3.1.1.2. If No – text box opens, notification sent to Move Coordinator, recorded in JIM

10.3.1.1.3. No response by 11:59pm on last day of service – becomes activity for Move Coordinator in JIM

10.4. Local, Multi-days of Service

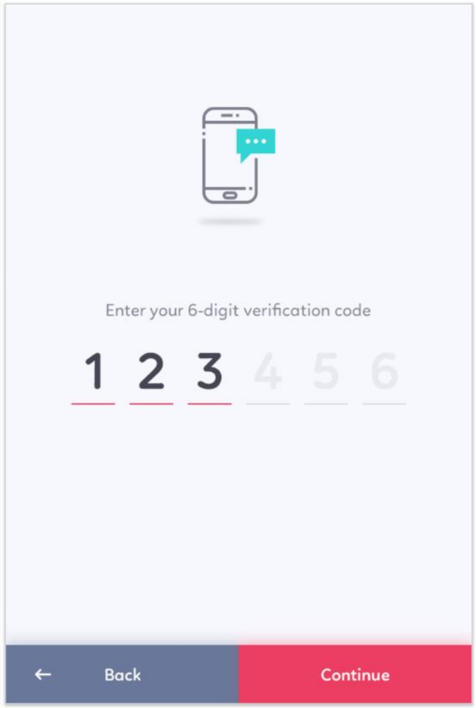
10.4.1. Every day of service, send Check in/Morning of

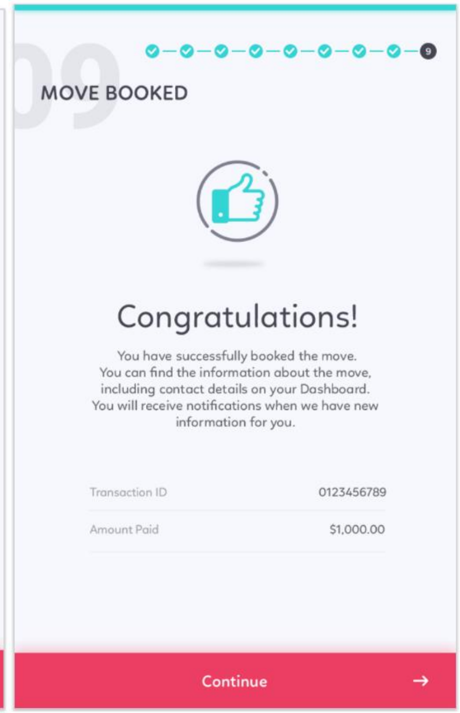
10.4.2. Last day of service, send End of day check in

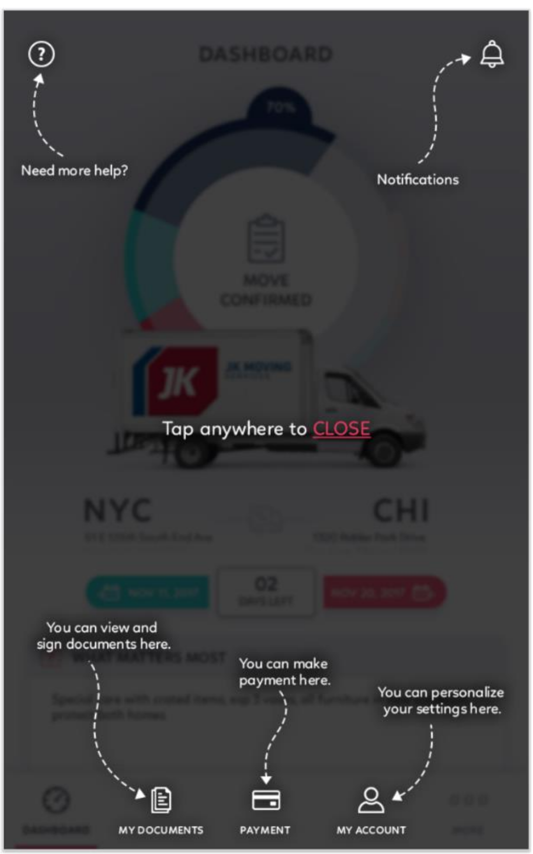
10.5. LD Service

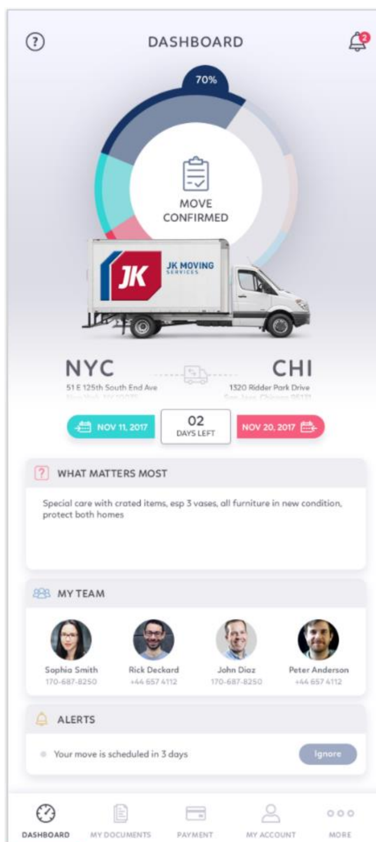
10.5.1. TBD

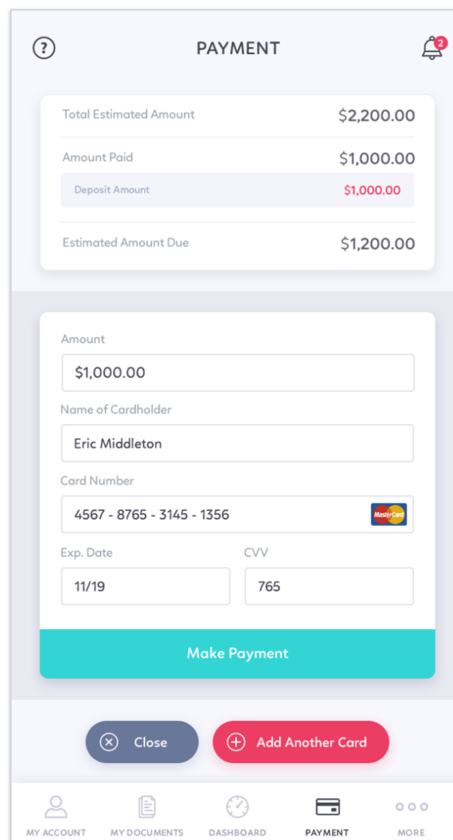
11. Screenshots



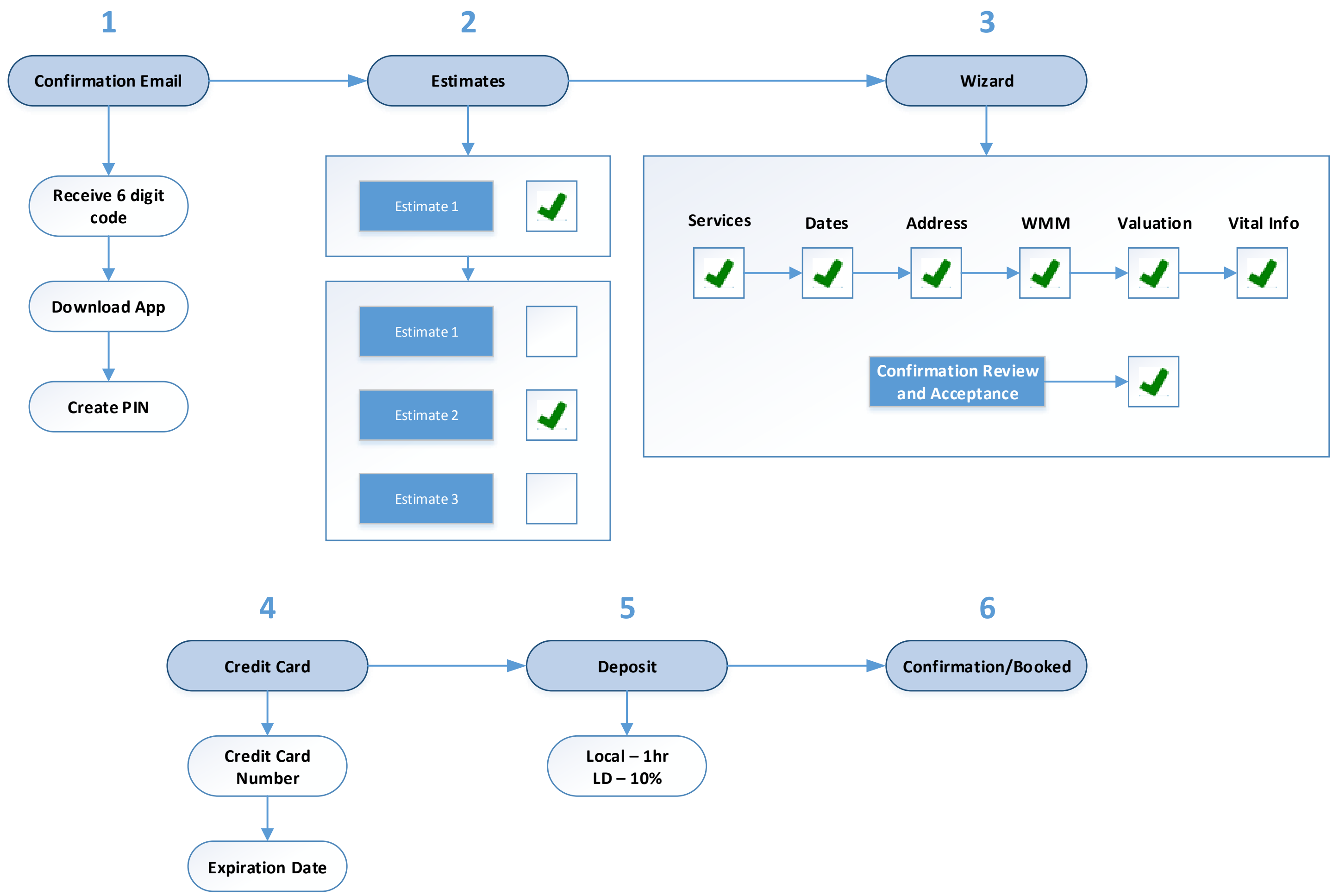








12. Workflow



Revision	Date	Description of Changes	Author/Editor
1.0	08/23/2017	Initial Document	Brad Toth
2.0	08/25/2017	Formatting updates	Brad Toth
2.0	08/30/2017	Overall document updates	Brad Toth
3.0	09/5/2017	Overall document updates	Brad Toth
4.0	9/21/2017	Scope changes	Brad Toth
5.0	11/30/2017	Updates	Brad Toth