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| **JIM – Feature Activity** | **User Manual** |
| Activities: Add a Move Activity | Customer Service Reference Guide |
| Activities: Navigate to Contact or Move Activities Page | Customer Service Reference Guide |
| Contacts (Activate, Deactivate) | Customer Service Reference Guide |
| Contacts (Create, Edit, View, Search, Sort, Filter) | Customer Service Reference Guide |
| Contacts (Set Default View) | Customer Service Reference Guide |
| Customer Care System View Dashboard | Customer Service Reference Guide |
| Dashboards (Add New Record) | Customer Service Reference Guide |
| Dashboards (Alternate View of Records) | Customer Service Reference Guide |
| Dashboards (Create a Dashboard) | Customer Service Reference Guide |
| Dashboards (Set Default View) | Customer Service Reference Guide |
| Email: Contact or Move Email (Add, View, Reply, Forward, Add Attachments) | Customer Service Reference Guide |
| Email: Track Email to Contact or Move (Set Regarding: Add, Remove) | Outlook Set Regarding - Email Management |
| Email: View Tracked Email (Contact or Move) - JIM | Outlook Set Regarding - Email Management |
| ePayments (Make, View, Void) | Charge on Credit Card |
| ePayment Wallet (Add Card, Disable Card, View Wallet) | Charge on Credit Card |
| How to: Clear Search Field | Customer Service Reference Guide |
| How to: Clear Search Results | Customer Service Reference Guide |
| How to: Navigation of a Record View | Customer Service Reference Guide |
| How to: Perform a Filter | Customer Service Reference Guide |
| How to: Perform a Regular Search | Customer Service Reference Guide |
| How to: Perform a Wild Card \* Search | Customer Service Reference Guide |
| How to: Reset Entire Filter | Customer Service Reference Guide |
| How to: Resize a Column | Customer Service Reference Guide |
| How to: Search CRM Data | Customer Service Reference Guide |
| How to: Selecting a View Page | Customer Service Reference Guide |
| How to: Selecting Record(s) | Customer Service Reference Guide |
| How to: Show/Don't Show the Welcome Page | Customer Service Reference Guide |
| How to: Sorting Records | Customer Service Reference Guide |
| How to: View the Service Work Area Dropdown | Customer Service Reference Guide |
| How to: View via the Current Work Area Indicator | Customer Service Reference Guide |
| How to: View via the Menu Button | Customer Service Reference Guide |
| Moves (Activate, Deactivate) | Customer Service Reference Guide |
| Moves (Assign a Coordinator) | Customer Service Reference Guide |
| Moves (Attach Documents) | Customer Service Reference Guide |
| Moves (Create, Edit, View, Search, Sort, Filter) | Customer Service Reference Guide |
| Moves (Set Default View) | Customer Service Reference Guide |
| Navigate to (JIM, Contacts, Moves, Dashboards) | Customer Service Reference Guide |
| Phone Call (Contact or Move: Add, Add Notes, View) | Customer Service Reference Guide |
| Service Activity (Add New Service Activity) | Customer Service Reference Guide |
| Service Activity (Assign Default Materials to Service Activity) | Customer Service Reference Guide |
| Setup a Move Document Folder | Document Management |
| Uploaded Document (Add, Edit, Delete, Replace, Drag-&-Drop, Scanning) | Document Management |

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| **JARVIS – Feature Activity** | **User Manual** |
| Add Notes to Documented Phone Call | Jarvis Application |
| Document a Service Confirmation Phone Call | Jarvis Application |
| Locate Desired Service Activity Record | Jarvis Application |
| Navigate and View Jarvis Application | Jarvis Application |
| Send a Service Call Confirmation Email | Jarvis Application |
| Send an Email Follow-Up | Jarvis Application |
| View Documentation from a Phone Call | Jarvis Application |
| View Sent Email | Jarvis Application |

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| **LD DISPATCH – Feature Activity** | **User Manual** |
| Assign/Un-Assign a Driver | LD Dispatch Application |
| Customer Call Log (Add, Update, View) | LD Dispatch Application |
| Day Blocks (Create, Remove) | LD Dispatch Application |
| Modify A Job's Service Type | LD Dispatch Application |
| Navigate to LD Dispatch | LD Dispatch Application |
| Schedule Delivery and Create Release | LD Dispatch Application |
| Training Job (Create, Transfer, Remove) | LD Dispatch Application |
| Update Special Instructions (SI) | LD Dispatch Application |
| Update What Matters Most (WMM) | LD Dispatch Application |
| View a Driver's Information | LD Dispatch Application |
| View a Job's Details | LD Dispatch Application |

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| **LOCAL DISPATCH – Feature Activity** | **User Manual** |
| Add/Remove Resources to Service Activity | Local Dispatch Application |
| Edit Service Activity | Local Dispatch Application |
| Locate Desired Service Activity | Local Dispatch Application |
| Manage Resource Downtime (Add, Deactivate) | Local Dispatch Application |
| Managing Teams (Add, Edit, Deactivate) | Local Dispatch Application |
| Navigate to Local Dispatch Application | Local Dispatch Application |
| Update Utilization Thresholds | Local Dispatch Application |
| View and Add Call Logs | Local Dispatch Application |
| View Documents | Local Dispatch Application |

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| **SERVICE ACTIVITY CREATION – Feature Activity** | **User Manual** |
| Correct the Move Record Error(s) | Service Activity Creation Application |
| Create New Service Activity | Service Activity Creation Application |
| Enter or Edit Data for the Service Activity | Service Activity Creation Application |
| Navigate to Service Activity Creation Application | Service Activity Creation Application |
| Navigate to the Move in JIM | Service Activity Creation Application |
| Page Navigation | Service Activity Creation Application |
| Refresh Record Display | Service Activity Creation Application |
| Selecting Move Contract Type | Service Activity Creation Application |