



# EZ MESSENGER

PROCESS SERVER WEB PORTAL PRESENTATION

# WELCOME

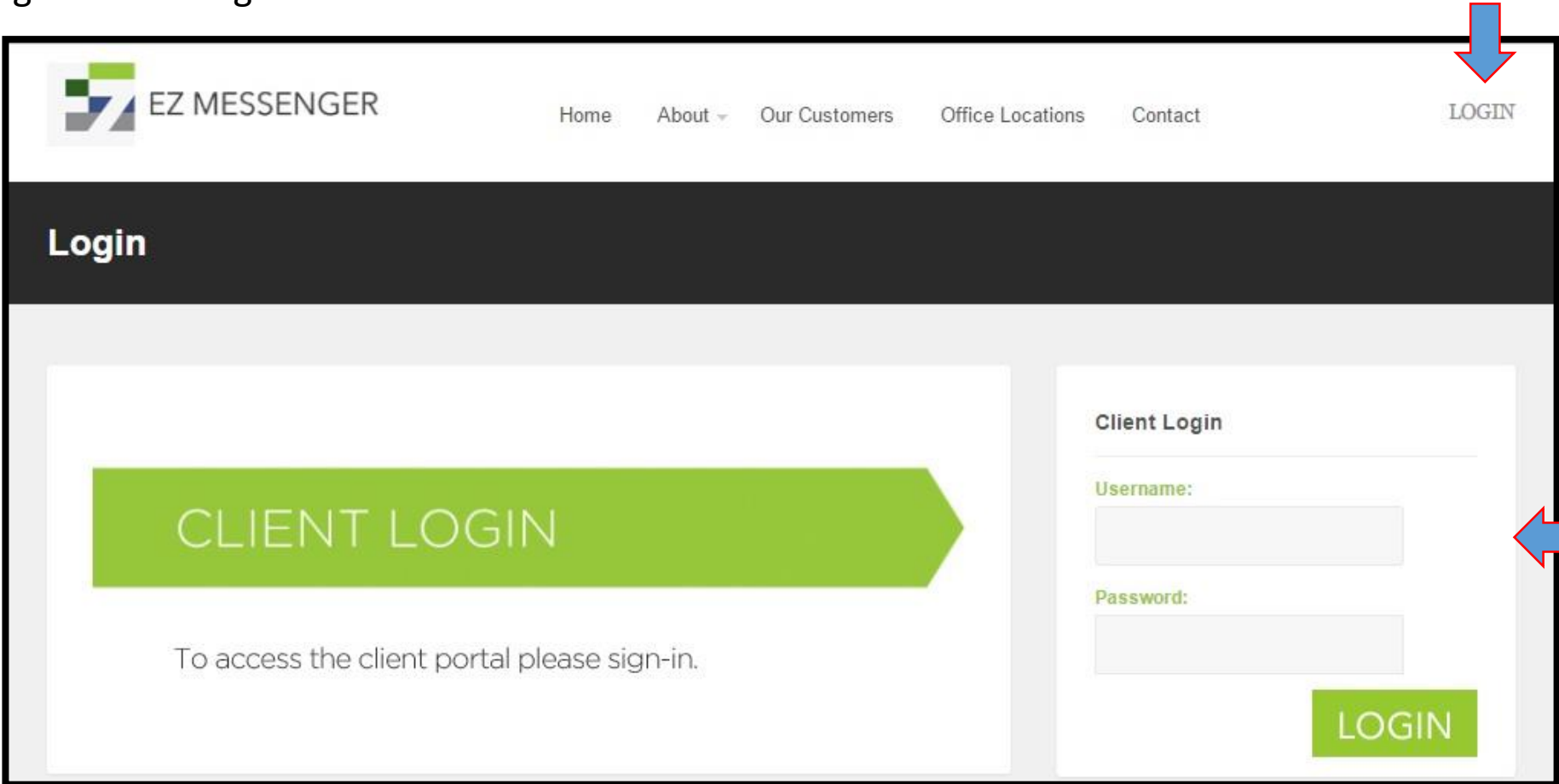
Welcome to the EZ Messenger Web Portal Presentation for process servers. We have worked in conjunction with process servers like yourself to bring features and functionality to our web portal that are designed to help make receiving documents, reporting attempts and returning affidavits easier for everyone.

In this presentation we will try to cover all of the features and functions available. Our web site is designed for optimal functionality in the Chrome web browser so we recommend using it over other browsers.

In the event you have questions, comments or suggestions after reviewing the attached instructions please contact your service coordinator.

# GETTING LOGGED IN

To get started go to [www.ezmessenger.com](http://www.ezmessenger.com). From here you can press the 'LOGIN' button to get to the 'Login' screen.

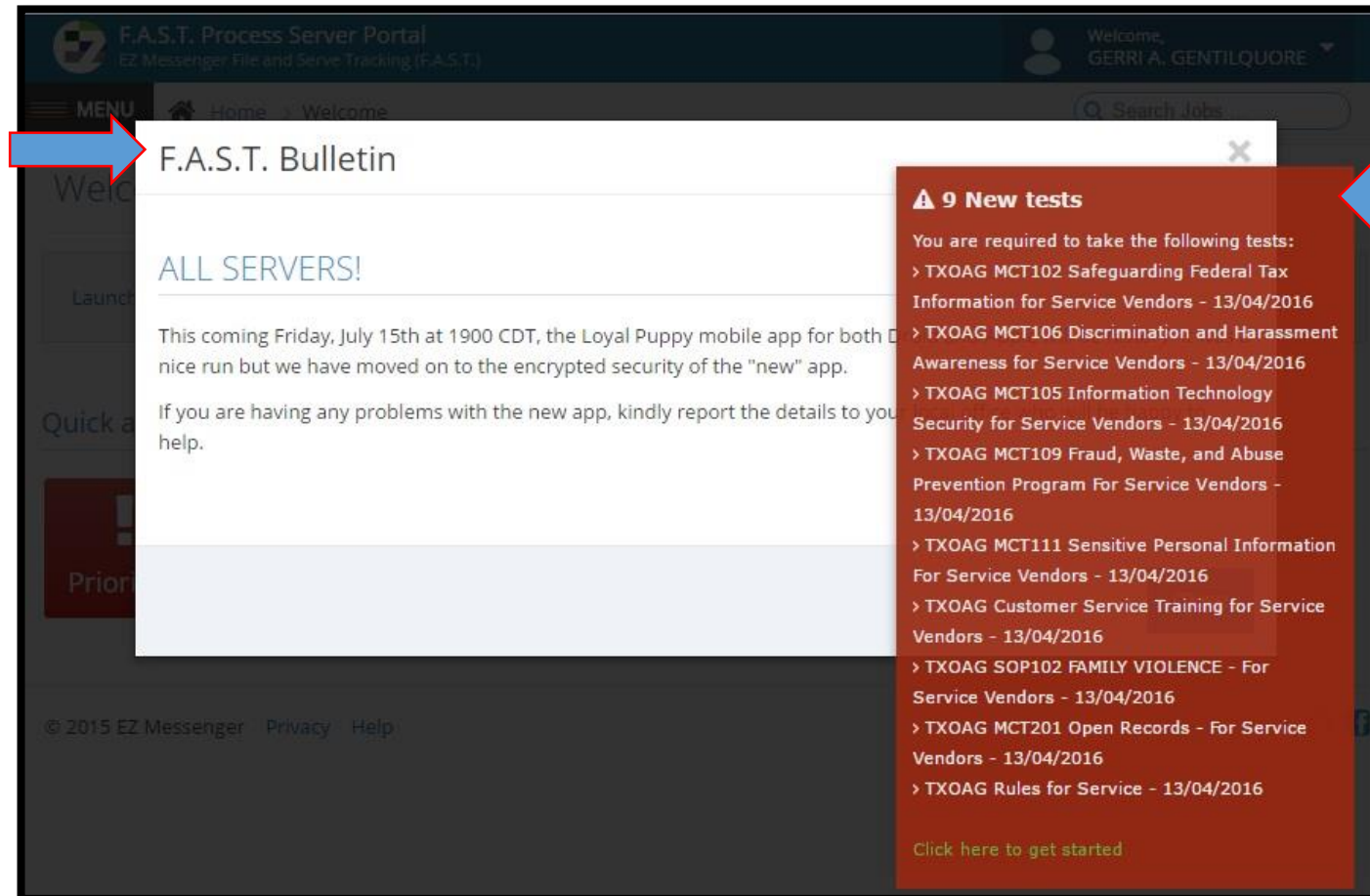


The screenshot shows the EZ Messenger website's login interface. At the top, the EZ MESSENGER logo is on the left, and navigation links (Home, About, Our Customers, Office Locations, Contact) are in the center. A 'LOGIN' button is in the top right corner, indicated by a blue arrow. Below the navigation bar is a dark grey header with the word 'Login' in white. The main content area is divided into two columns. The left column features a large green arrow pointing right with the text 'CLIENT LOGIN' inside, and below it, the text 'To access the client portal please sign-in.' The right column contains the 'Client Login' form, which has fields for 'Username:' and 'Password:', and a green 'LOGIN' button at the bottom right, indicated by a blue arrow. A third blue arrow points to the 'CLIENT LOGIN' button on the left side of the form.

Enter your Username and Password then press 'LOGIN'.

Once you log in you will be taken to the 'Home' screen. When you first log in you will be shown the bulletin board as well as notification of any tests you will need to take. After you review and close these items you will be able to view and use the links on the 'Home' screen.

F.A.S.T. Bulletin –  
important  
notifications for  
process servers.



Tests – notification of  
any new testing to be  
taken.

# HOME SCREEN

Here is your 'Home' screen. From here you can see notifications, new jobs, access all jobs in your inventory and view your commissions among other things. We will cover each section in more detail below. We will start with the links on the center and right side then move on to the navigation links on the left.

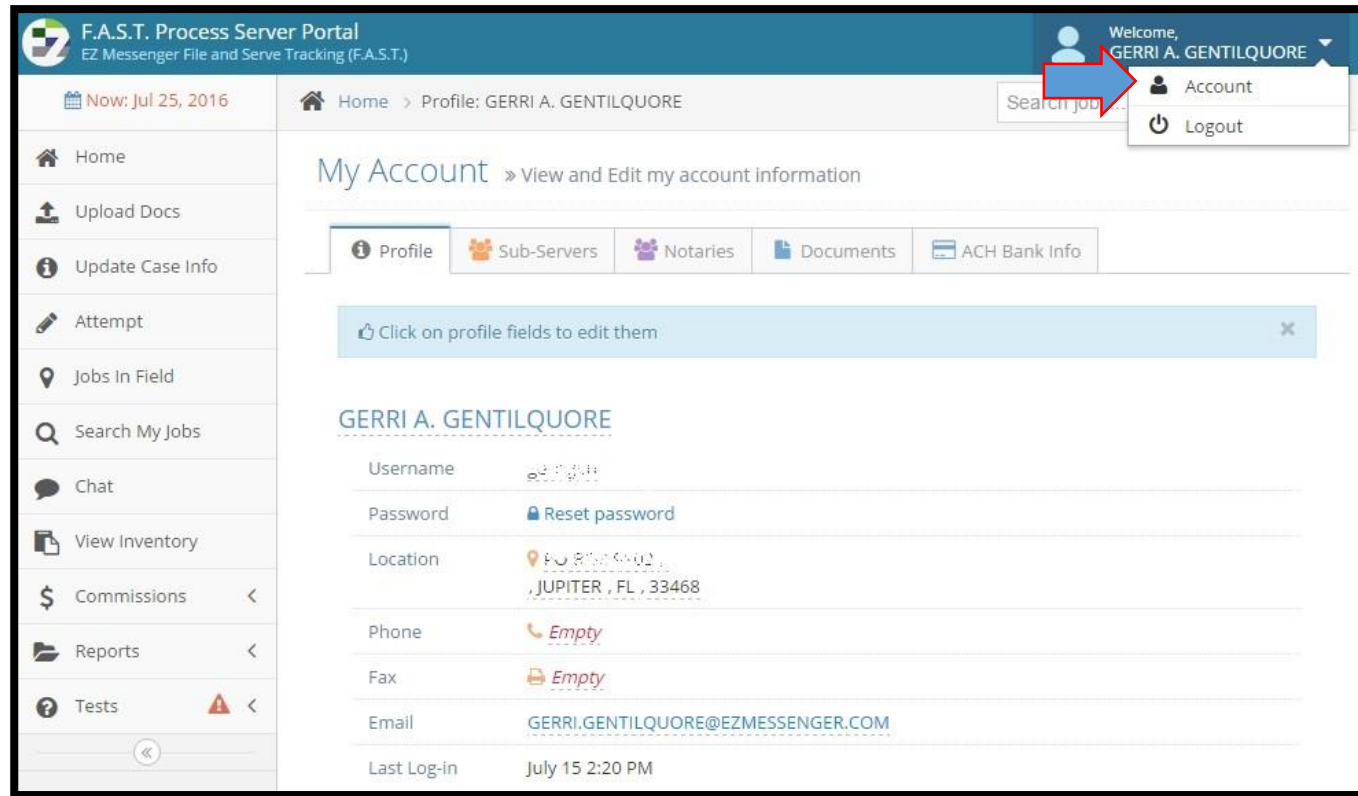
The screenshot shows the EZ Messenger Server Web Portal Home screen. The interface includes a top navigation bar, a left sidebar with navigation links, a main content area with a search field, a launch bulletin, and quick access links. Annotations with arrows point to specific features:

- Navigation links:** Points to the left sidebar containing links like Home, Upload Docs, Update Case Info, Attempt, Jobs In Field, Search My Jobs, Chat, View Inventory, Commissions, Reports, and Tests.
- Notifications:** Points to the notification icon (a purple square with a white asterisk and a red circle with the number 3) in the top right corner.
- Logged in user name:** Points to the user profile section in the top right corner, which includes a user icon and the text "Welcome, [username]".
- Search field:** Points to the "Search jobs..." input field in the top right corner.
- Launch Bulletin:** Points to the "Launch F.A.S.T. Bulletin" button in the main content area.
- Quick access links:** Points to the "Quick access" section, which contains three buttons: "New Jobs" (blue with a white asterisk and a red circle with the number +3), "Priorities" (red with a white exclamation mark), and "Approve Affs" (green with a white checkmark).

# MY ACCOUNT

First things first. Let's start with 'My Account' since it is how we contact you, notify you of jobs, and get you paid. When you click your logged in name at the upper right corner of the 'Home' screen you will be able to select 'Account'. From here you can access, view and modify information on your account. Some items you will have to contact your service coordinator for assistance modifying.

- Profile – review and change your username, password, address, phone, fax, and email
- Sub-Servers – view the listing of process servers considered part of your account
- Notaries – view the listings of notaries considered part of your account
- Documents – upload and view any documents for your account
- ACH Bank info – add savings or checking account information for direct deposit of commissions earned



# PROFILE

Profile

Sub-Servers

Notaries

Documents

ACH Bank Info

Click on profile fields to edit them

GERRI A. GENTILQUORE

Username

Password

Reset password

Location

PO BOX 101  
JUPITER, FL 33468

Phone

✓

✕

Fax

Empty

Email

GERRI.GENTILQUORE@EZMESSENGER.COM

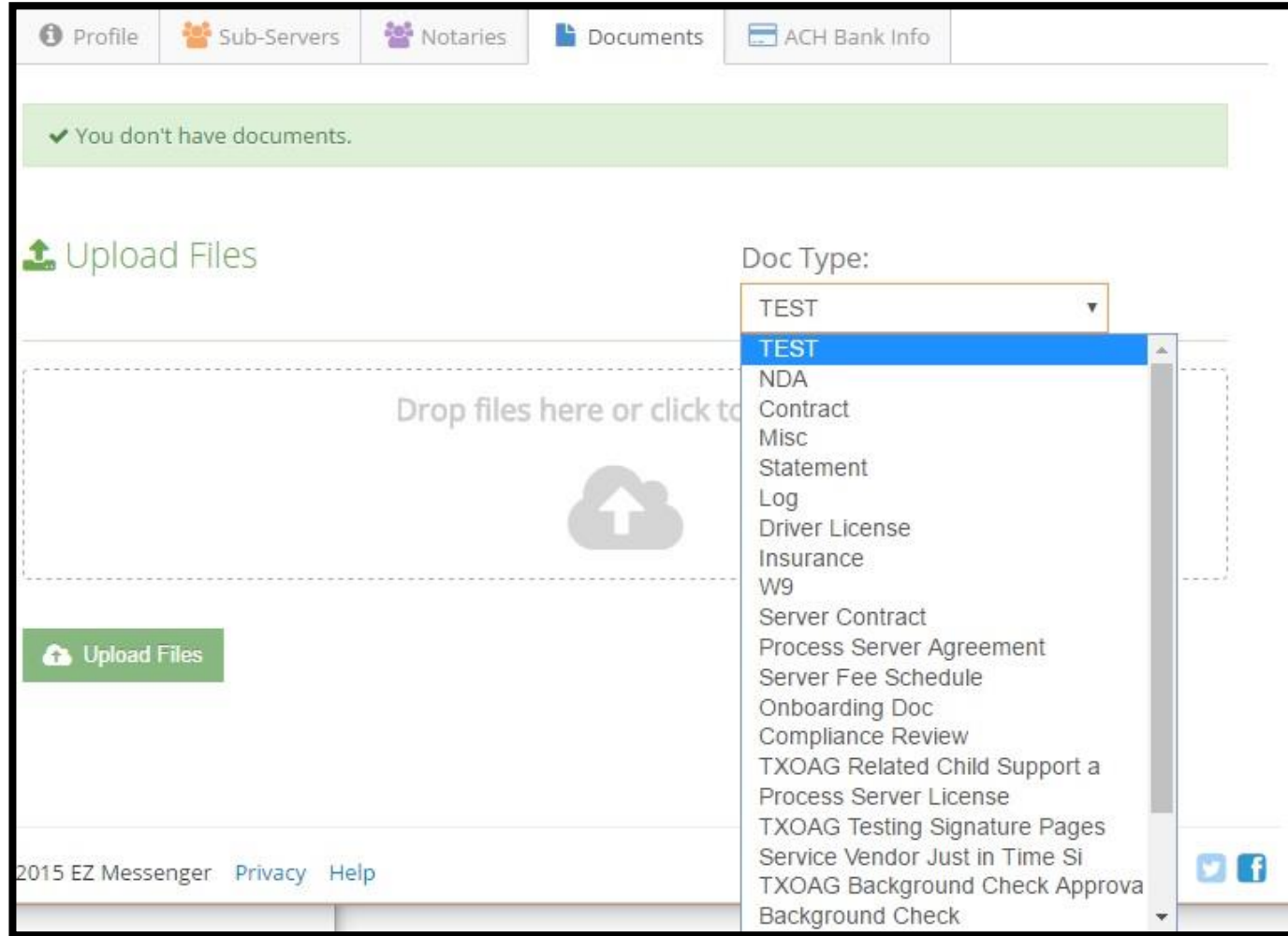
Last Log-in

June 24 3:42 PM

If you need to change or add information listed under your profile simply click the appropriate location. Fill in the box and select the checkmark to save. The 'x' to the far right will close the selection without saving.

If there is information listed that you need to remove then click the appropriate field and select the red 'x' to remove the information. Once removed select the checkmark to save.

# DOCUMENTS



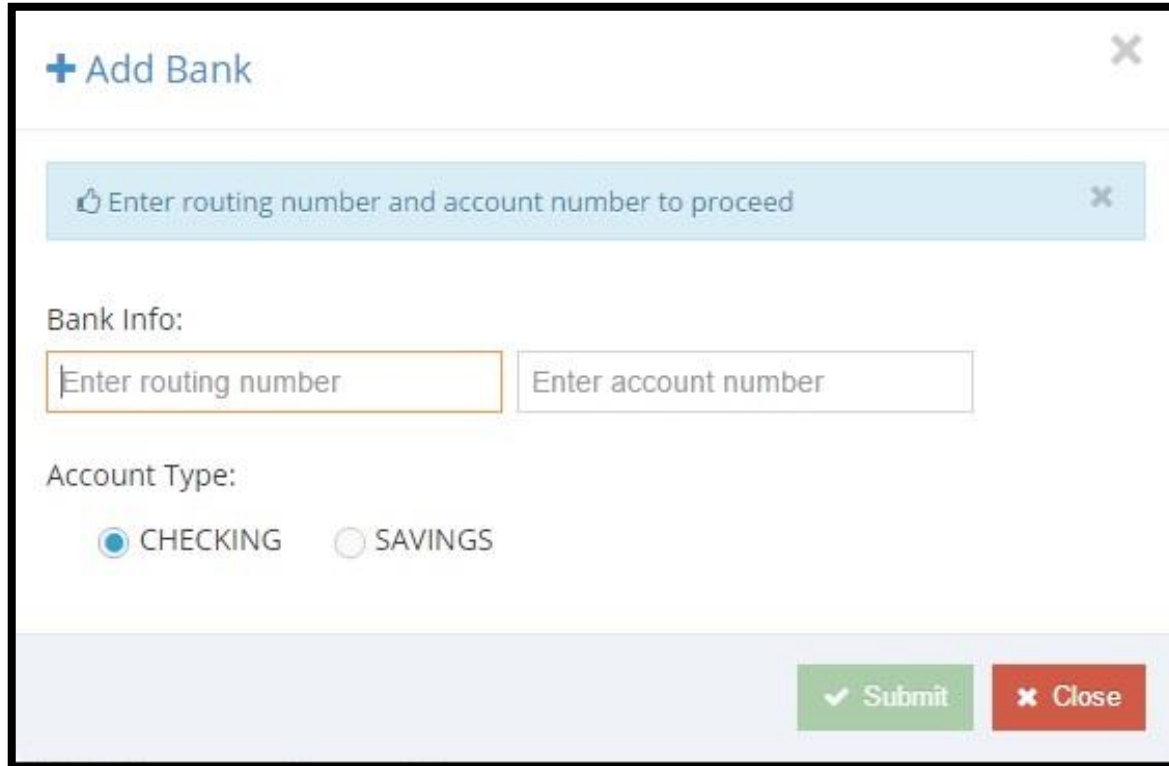
Here you can view the documents already uploaded in regards to your server account.

You can also add documents relative to your service account thru the 'Documents' tab. Either click the area labelled 'Drop files here or click to choose' to browse your computer for documents or drag-and-drop the files into the blank. Once you select the documents to upload select the matching document type then select 'Upload Files' at the bottom left.



# ACH BANK INFO

The 'ACH Bank Info' tab is where you can add information so we can process payments directly to your bank account via direct deposit. This information is secured and only viewable by you. Our staff has no direct access to this information and can only confirm if you have or have not entered bank account information.

The image shows a web form titled '+ Add Bank' with a close button (X) in the top right corner. Below the title is a light blue instruction bar that says 'Enter routing number and account number to proceed' with a close button (X) on the right. Underneath, the 'Bank Info:' section contains two input fields: 'Enter routing number' and 'Enter account number'. Below these is the 'Account Type:' section with two radio buttons: 'CHECKING' (which is selected) and 'SAVINGS'. At the bottom right of the form are two buttons: a green 'Submit' button with a checkmark icon and a red 'Close' button with an X icon.

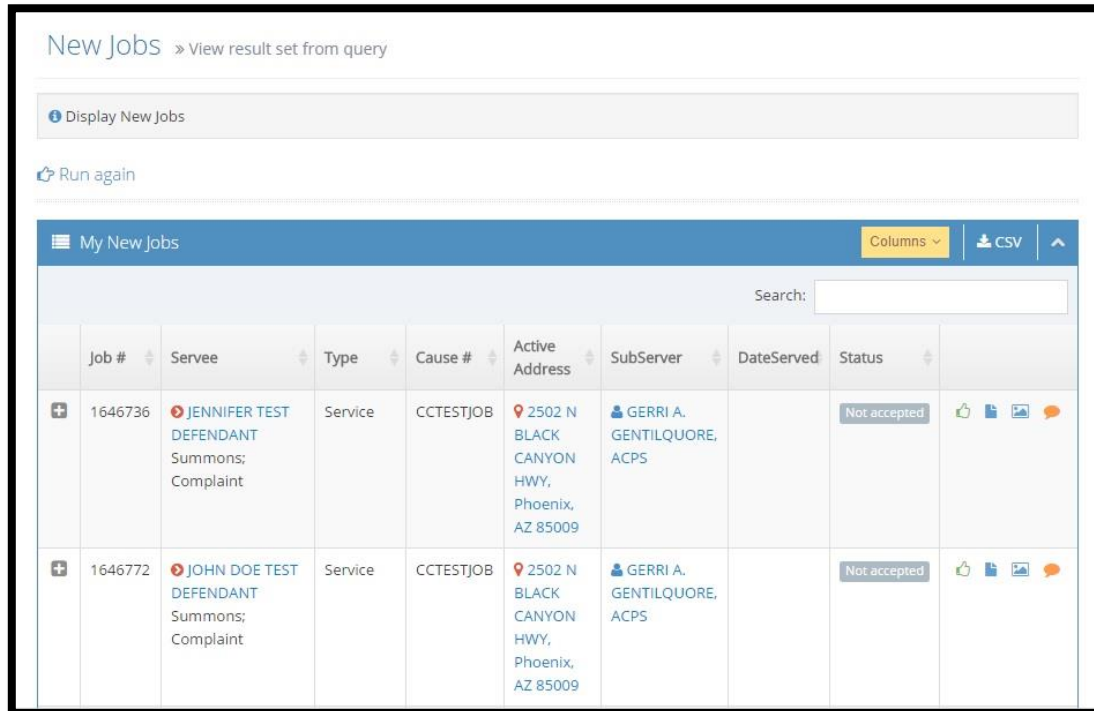
To add a bank account select the 'ACH Bank Info' tab then select 'Add Bank'. Enter your bank routing information in the field on the left. Enter your account number in the field on the right. Select whether this is a checking or savings account and 'Submit'.

There will be a brief verification and then the information is stored and your direct deposit will become available on the next pay period. This process must be completed at least 3 days prior to the pay period or it will not be effective until the following pay period.

\*\*\*Please note - It is highly recommended that you use Chrome to complete this request. Use of other browsers may cause the system to not store your information.\*\*\*

# NEW JOBS

From the 'Home' screen you can access 'New Jobs' from the purple 'Notifications' button in the upper right or from the large blue 'New Jobs' button in the 'Quick access' area. 'New Jobs' are any item recently assigned to you but not yet accepted. This listing looks like your inventory screen. You will be able to see job information including servee name, the active address for service, job status and download to Excel. Items will be reviewed in detail farther along in this presentation.



The screenshot shows the 'New Jobs' interface. At the top, there's a header 'New Jobs' with a link 'View result set from query'. Below it, a button 'Display New Jobs' and a 'Run again' link are visible. The main table is titled 'My New Jobs' and has a search bar. The table contains two rows of job listings. Each row has columns for Job #, Servee, Type, Cause #, Active Address, SubServer, DateServed, Status, and a set of action icons (thumbs up, scans, photos, chat).

	Job #	Servee	Type	Cause #	Active Address	SubServer	DateServed	Status	
+	1646736	JENNIFER TEST DEFENDANT Summons; Complaint	Service	CCTESTJOB	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	GERRI A. GENTILQUORE, ACPS		Not accepted	👍 📄 📷 💬
+	1646772	JOHN DOE TEST DEFENDANT Summons; Complaint	Service	CCTESTJOB	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	GERRI A. GENTILQUORE, ACPS		Not accepted	👍 📄 📷 💬

To accept your new jobs click the green thumbs up icon in the right column. It will display 'Accept Job' when you mouse over it.

The 'Scans' icon in the right column takes you to the scans for the job.

The 'Photos' icon in the right column takes you to the photos taken for the job.

The 'Start Chat' icon will take you to a conversation dialogue box so you can send messages to your service coordinators.

If you need to refresh the list click the 'Run again' indicator on the upper left.

# PRIORITY JOBS

If you click the red 'Priority Jobs' button on the 'Home' screen it will take you to a listing of prioritized jobs within your active inventory. These are jobs not yet considered completed. These are prioritized thru a series of criteria including the due date and the number of days since the job was last attempted. Columns in our tables are sortable by clicking the up and down arrows on the right side of the column.

You can click on the job numbers to get to access the job screens for review of the item.

Priority Jobs » View result set from query

Display priority jobs

Run again

DataTable Result Set Columns CSV

Show 50 entries Search:

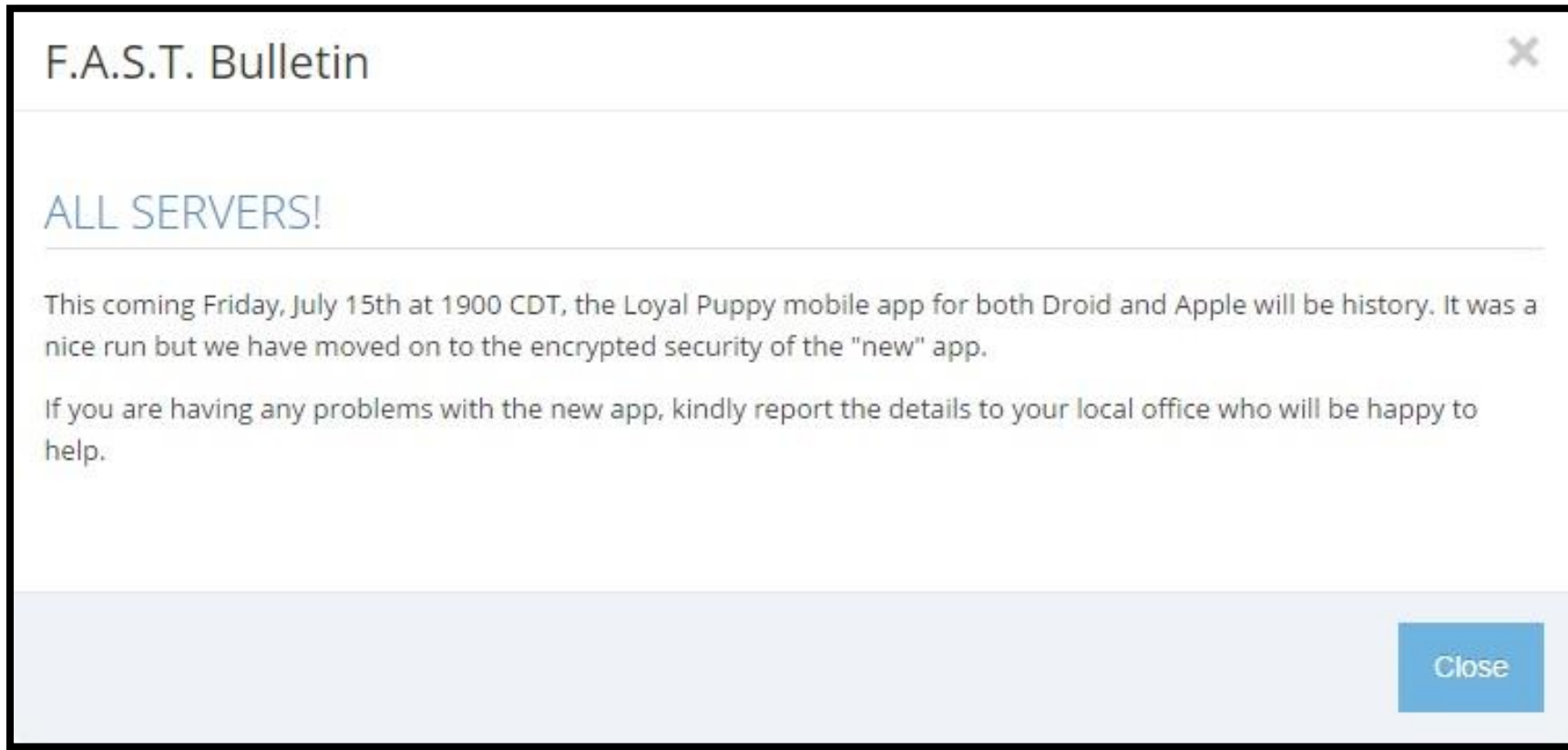
Job #	Due Date	Last Attempt Date	Days Since LA	Ord
315811	2015-12-12	2016-06-09	216	1
1646736		2016-06-09	0	2
1646772		2016-06-09	0	2
315811	2015-12-12	2016-06-09	0	2

Showing 1 to 4 of 4 entries Previous 1 Next

You can download the spreadsheet in Excel by clicking 'CSV'.

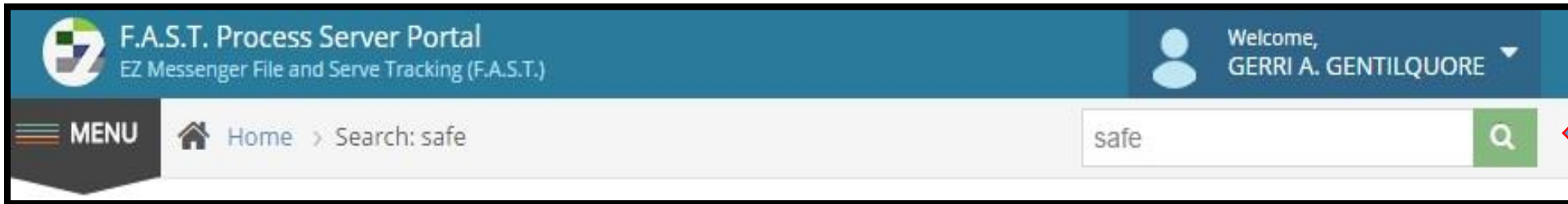
# LAUNCH F.A.S.T. BULLETIN

The bulletin launches when you first log in. If you closed the bulletin and would like to view the information again click the link near the top of the 'Home' screen which says 'Launch F.A.S.T. Bulletin' and the bulletin will be re-displayed on your screen.



# SEARCH JOBS

There are a couple of ways to use the server web portal to search for jobs. Perhaps the most convenient way is thru the box in the upper right corner of your screen. This field uses a global search so you can type portions of information to get what you are looking for. In the sample below we typed a partial servee name. Click the magnifying glass or press [Enter] to process your search.



Your search results will populate in the window. This listing will have the same look as your inventory screen. You will be able to get to the job by clicking the servee name, pull up a map in Google by clicking the active address, accept the job, add attempts, view scans, view photos, or begin a chat session. We have made each column alphabetically sortable and you can download the items to an excel spreadsheet using the 'CSV' button. Each of these items will be covered later in this presentation.

Search Result » Search result for "safe"

Search for: "safe"

Columns

CSV

Show 50 entries

Search:

	Job #	Servee	Type	Cause #	Active Address	SubServer	DateServed	Status	
	315811	CUSTODIAN OF RECORDS FOR SAFEWAY SUBPOENA DUCES TECUM; AFFIDAVIT OF CUSTODIAN OF RECORDS; LETTER DATED 12/9/2013	File & Serve	c20015555	1301 W DUVAL MINE ROAD, Sahuarita, AZ 85629	GERRI A. GENTILQUORE, ACPS		<div>INCOMPLETE</div>	

Showing 1 to 1 of 1 entries

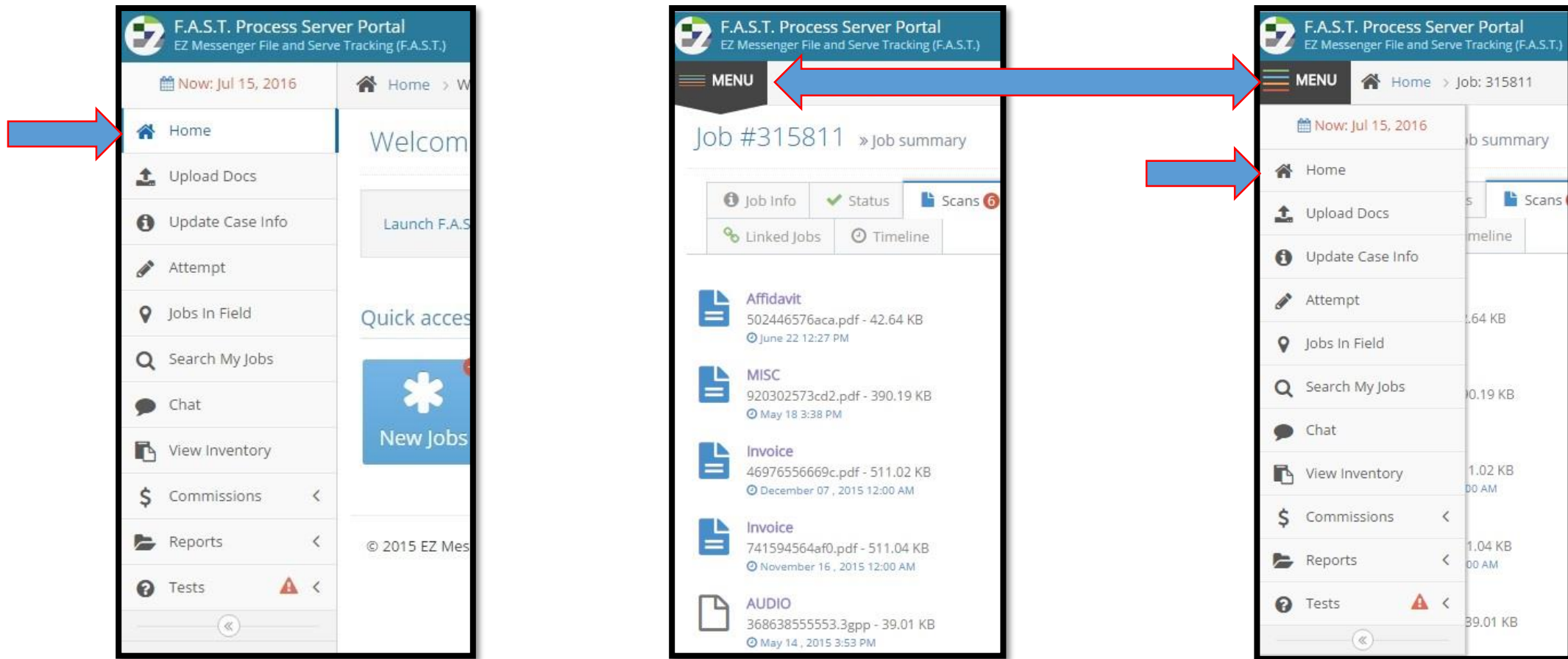
Previous

1

Next

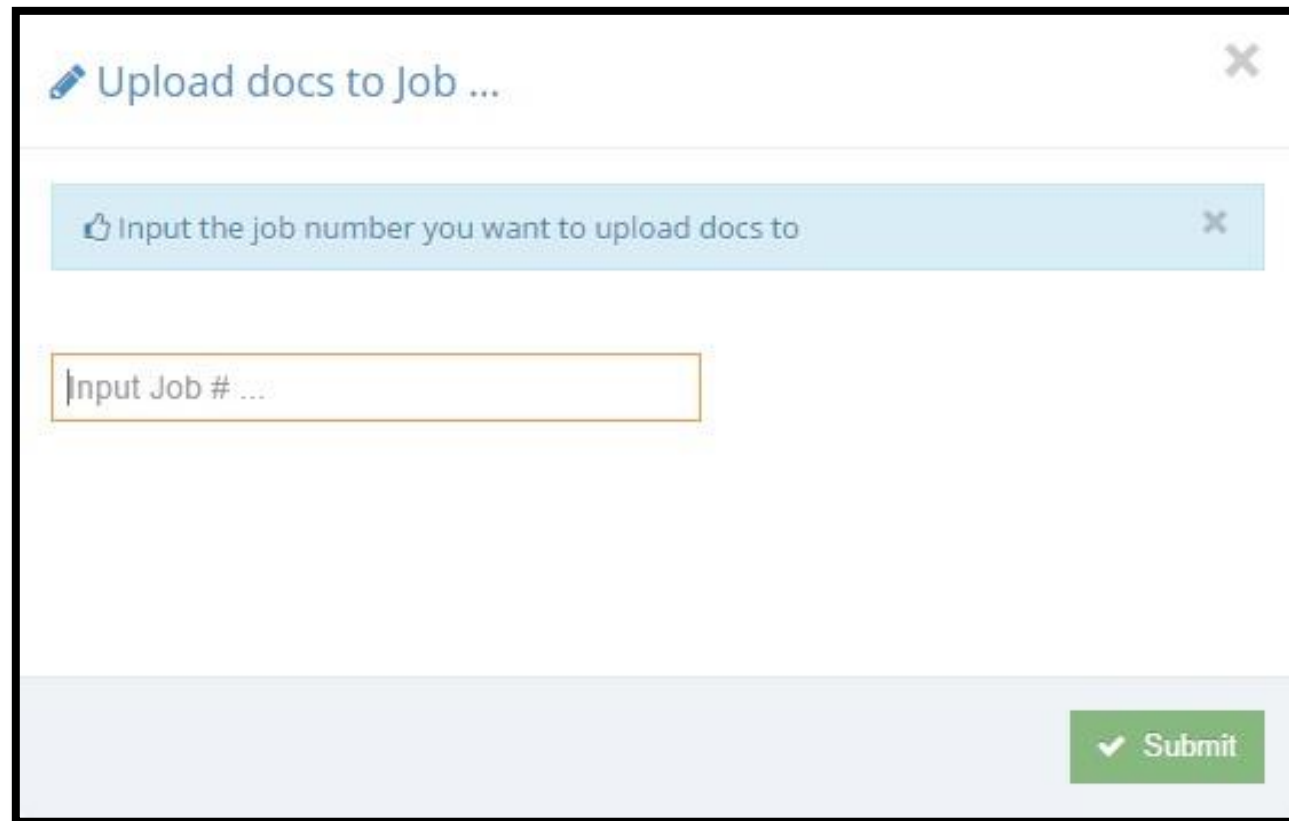
# NAVIGATION LINKS

Now that we have covered the other items on the screen let's look at the items in the menu on the left. These links are visible from every screen. Depending on your screen resolution this may appear as a drop-down style menu instead. Click 'Menu' to open the drop-down. Clicking the 'Home' button will return you to the 'Home' screen.



# UPLOAD DOCS

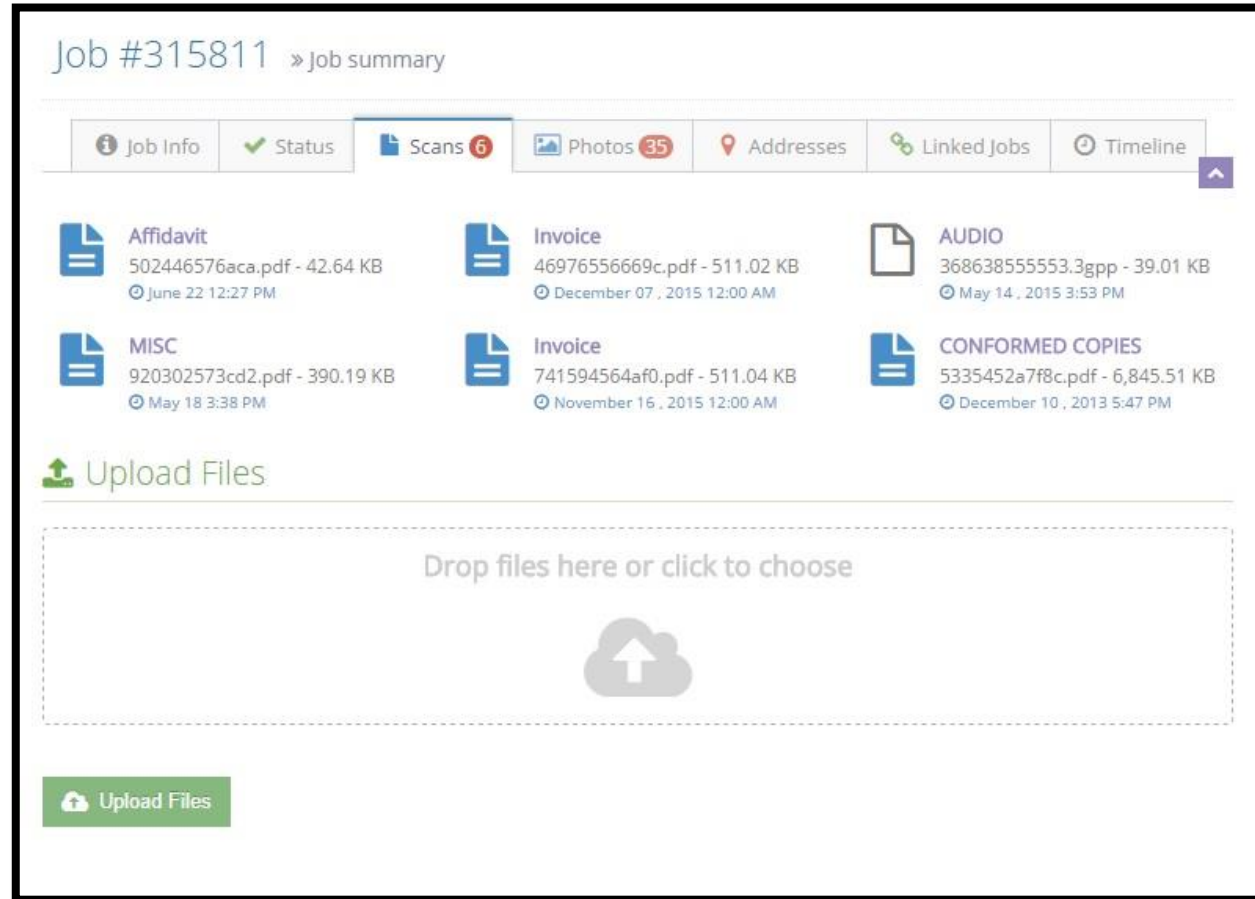
If you have documents to attach to a job there are a couple of ways to do this, but the easiest to access is by the 'Upload Docs' link. Click the link and a new window will pop up asking for the job number. Input the job number and click 'Submit'.



The image shows a web-based dialog box titled "Upload docs to Job ...". It features a light blue header bar with a pencil icon and a close button (X). Below the header is a light blue instruction bar that says "Input the job number you want to upload docs to" with a close button (X). Underneath is a text input field with a yellow border and a placeholder text "Input Job # ...". At the bottom right of the dialog is a green "Submit" button with a checkmark icon.



Once you 'Submit' you will be directed to the 'Scans' screen on the job. You can either drag-and-drop the file into the large box labelled 'Drop files here or click to choose' or you can click in that area. Clicking in the box will bring up your file explorer window so you can browse to the file you want to upload.

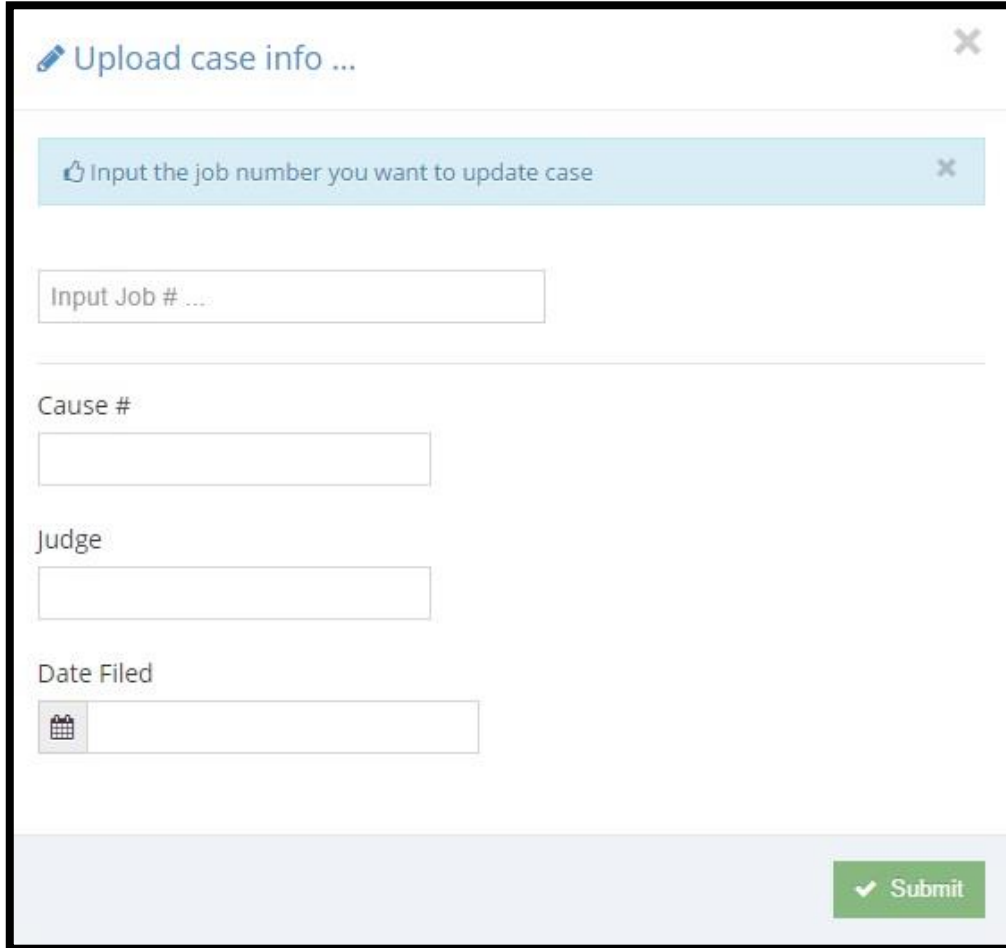


Things to note –

- File label is dictated by staff at our office. Initially your file will be labelled generically. Once reviewed by staff it will be labelled accordingly.
- You will only be able to upload to jobs in your name.
- Several different file types are accepted. Preferred formats are .pdf and .jpg.
- File upload may be limited by size. If you are sending a very large file and receiving an error you may wish to submit it in a smaller DPI or split the scan into pieces.

Please contact us if you continue to receive an error when trying to upload.

# UPDATE CASE INFO

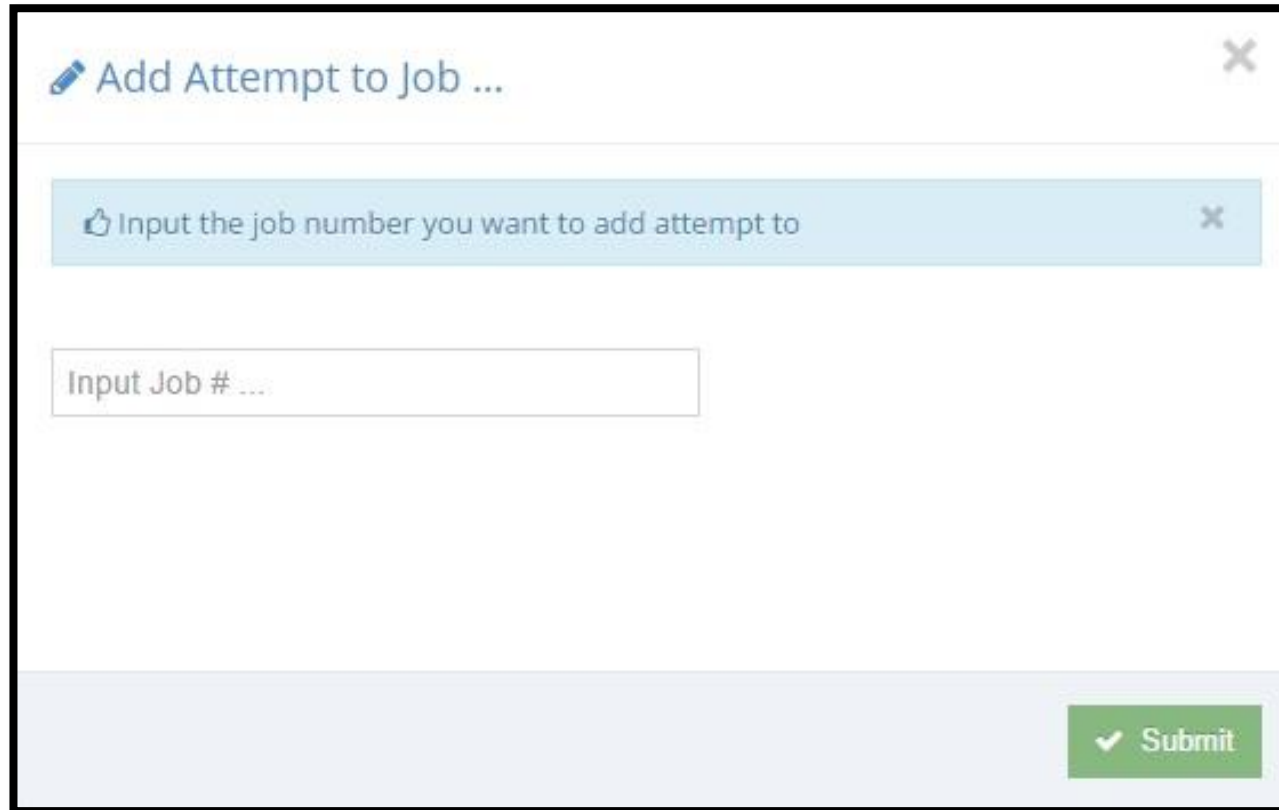


The screenshot shows a web application window titled "Upload case info ..." with a close button (X) in the top right corner. Inside the window, there is a light blue header bar with a document icon and the text "Input the job number you want to update case", followed by a close button (X). Below this, there are four input fields: "Input Job # ....", "Cause #", "Judge", and "Date Filed" (which includes a calendar icon). At the bottom right of the window is a green "Submit" button with a checkmark icon.

At times we send you jobs where you will have to update the case number. Use the 'Update Case Info' link to do this. In the new window type in the Job number, Cause number, Judge (if provided) and the Date Filed then click 'Submit'.

Once accepted the system will return you to the 'Job Info' screen for the job number you entered. Double-check your entry in the 'Case Info' section of the screen. If any information is incorrect click 'Update Case Info' again and re-submit the information.

# ATTEMPT





The screenshot shows a web-based dialog box titled "Add Attempt to Job ...". Inside the dialog, there is a light blue header bar with a pencil icon and the title. Below this is a light blue input field with a magnifying glass icon and the placeholder text "Input the job number you want to add attempt to". Underneath the input field is a white text box with the placeholder text "Input Job # ...". At the bottom right of the dialog is a green button with a checkmark icon and the text "Submit".

To add attempts online use the 'Attempt' link. You can add attempts of any type as long as a job is still in your name and not considered completed (served or non-served).

To begin entry of an attempt type the job number and click 'Submit'. You will then be directed to the 'Add Attempt Wizard'.

Attempt » Add Attempt/Status for this job

---

 Add Attempt Wizard 

---

1 2 3 4 5

Select Address Upload Photo Outcome Outcome Details Finish

---

Enter Address Info.

Select Address: ☐ 355 S. EUCLID, Tucson, AZ 85719  
☐ 1301 W DUVAL MINE ROAD, Sahuarita, AZ 85629  
☒ Add New Address

---

\* Address:

City  Choose State...  Zip Code

---



The first screen you will be taken to is the 'Select Address' screen. Select an address already listed or select 'Add New Address' in order to enter a new address.

If you select 'Add New Address' additional fields will become available at the bottom of the screen. Please fill in all blanks including any suite or lot numbers.






Select 'Next' when done.

Attempt » Add Attempt/Status for this job

---

 Add Attempt Wizard 

---


    


Select Address Upload Photo Outcome Outcome Details Finish

---


Upload Photo

Drop photo here or click to choose





 You can only upload files with these file types:

> Image Files (\*.jpg, \*.jpeg, \*.png, \*.gif)



---

Next is the 'Upload Photo' screen. Either drag-and-drop a photo into the area labelled 'Drop photo here or click to choose' or click in the box to open the file explorer window so you can browse to a photo to select it for upload.

When possible use GPS embedded photos.

Only certain file types are accepted. Accepted upload types are .jpg, .jpeg, .png and .gif.

Select 'Next' when done.

## Attempt » Add Attempt/Status for this job

### Add Attempt Wizard



### Outcome of Attempt

- ☐ Served
- ☐ Attempt
- ☐ Bad Address
- ☐ No Attempt/Problem

← Prev

Next →

Next you will select the type of attempt you want to enter. You can choose from:

- Served
- Attempt
- Bad Address
- No Attempt/ Problem

Based upon the attempt type chosen you will be directed to a new screen to fill in details.

The next screen has information how to select the the correct type of attempt.

## Attempt (also 106 in Texas)

- Use this if you make an attempt and nothing of consequence happens. Example is when you knock on the door and get no answer. You have no way to confirm if the address is bad or a problem yet at this point and should not indicate it is until then. Indicate the information you have at this time, including details such as vehicles present, lights on, if you checked with a neighbor, etc. and re-attempt at a later date.

## Served

- You managed to serve the item in an appropriate manner. Indicate accordingly using the matching manner of service, complete description of party served/ manner posted and notate any special circumstances as needed. Selecting this manner closes the job to additional attempt information. If you have additional notes to enter place them in the 'Service Comments' or enter an 'Attempt' with information/ details, then go back into the job and select 'Served'.

## Bad Address

- Attempt type 'Bad Address' is only used when an address is confirmed as bad by someone, usually the current resident. 'Bad Address' is not enough information. We need detailed notes in the attempt. Example - 'Bad Address per current resident, John W/M 35 Years old, who moved in 2 months ago.' Additionally, an apartment leasing office saying someone is not on the lease does NOT qualify as a bad address. The defendant may be staying there and not be on the lease. The more information you can get the better. \*\*If the address does not exist, this needs to be confirmed by USPS.com or CAD then it can be entered as a Bad Address\*\* Indicating 'Bad Address' will remove the job from your name immediately. If you have additional research you will be doing later you may wish to select 'Attempt' instead and simply note what happened during the attempt, then add another attempt later with any additional findings and use the selection 'Bad Address'.

## Problem

- Attempt type 'Problem' is used for any issue preventing service OTHER THAN a Bad Address (see above). This includes but is not limited to: multiple diligent attempts with no response or confirmation of address at the residence or at neighbors; 'No Trespassing' signs preventing service; threats made to the server by a resident; due date expired, etc. Always provide as much information as possible. \*All Problems require multiple diligent attempts with the exception of threats or 'No Trespassing' signs.\* Indicating 'Problem' will remove the job from your name immediately. If you have additional research you will be doing later you may wish to select 'Attempt' instead and note what happened during the attempt, then add another attempt type of 'Problem' later with the additional findings/ information.

The first manner on the listing is 'Served'. It is important to note that once you choose this manner no further alterations or additions can be made after you finalize your submission. This manner will subsequently generate an affidavit for either an original print-and-sign document or e-signing, depending on the governing rules of service, court filed at and the client preference.

Attempt » Add Attempt/Status for this job

Add Attempt Wizard

Select Address

Upload Photo

Outcome

Enter Outcome Detail (Served)

\* Select Manner:

<Select Manner>

\* Completion:

Date:

Time:

Sub-Server:

GERRI A. GENTILQUORE, ACPS - PM400 Exp: 12/30/2017

<Optional>

GERRI A. GENTILQUORE, ACPS - PM400 Exp: 12/30/2017

Gerri Sub Server - NONE Exp: 07/25/2016

← Prev

Next →

Once you select a manner of service additional blanks will appear allowing you to fill in details appropriate to the manner selected.

In all manners you will need to include a date and time of the service.

If there are multiple servers in your company you will also be allowed to select the server name.



## Enter Outcome Detail (Served)

\* Select Manner:

Residential Sub Service ▼

\* Completion:

Date:



07/24/2016

Time:

12:30



\* Left With:

\* Title:

Sub-Server:

GERRI A. GENTILQUORE, ACPS - PM400 Exp: 12/30/2017 ▼

Description:

Sex

N/A ▼

Skin

N/A ▼

Hair

N/A ▼

Height

N/A ▼

Weight

N/A ▼

Age:

Other Description:

Married:

☐ Yes

☐ No

☐ Not Known

Military:

☐ Yes

☐ No

☐ Not Known

Once you select the manner for service and the additional blanks appear please make sure you fill in as much detail as possible. Items marked with an asterisk (\*) are the minimum required fields.

‘Other Description’ is for things like ‘glasses’ or ‘large tattoo of bird on neck’, etc.

Lower on the page is a ‘Service Comments’ blank for details you would like to appear on the affidavit, such as ‘left documents under doormat per resident who stated she did not want to open security screen door to accept documents, but would pick them up when server leaves property.’

Attempt » Add Attempt/Status for this job

 Add Attempt Wizard 



Select Address



Upload Photo



Outcome



Outcome Details



Finish

**We are almost done!**

Please review your entries by clicking each of the Step Buttons and once you have confirmed click FINISH to finalize the Workorder. You may also save your steps as a TEMPLATE by selecting that option BEFORE choosing FINISH.

← Prev

Finish →

After you enter all the information you will have the chance to go back and double-check your work.

This is the only time you can make alterations to any entry you make. Once you select 'Finish' you will need assistance from a service coordinator to make alterations.

Result Log

Attempt for Job #1646772

Creating attempt info — served

▶ Manner: Residential Sub Service

▶ Completed on: 07/24/2016 12:30

▶ Left With: Jane Doe

Service Description

▶ Title: Resident

▶ Sex: Female

▶ Skin: Caucasian

▶ Hair: Brown

▶ Age: 40+

▶ Height: 5ft 5in

▶ Weight: 225

▶ Other: glasses

▶ Military: 2

▶ Married: 2

▶ Servicecomments: Stated subject was a night worker and is asleep at this time.

OK



After you click 'Finish' a pop-up box will appear with the resulting information. Clicking 'OK' takes you back to the job screen.

Since you have listed this as 'Served' an affidavit should now be available for signature or e-signature from inside the job screen or in your Reports under 'Affidavits Outstanding' or 'E-Sig Affidavits Outstanding'.

Once you reach this screen you will not be able to make alterations. Please contact your service coordinators by phone, email, or by using the 'Chat' feature which we will cover shortly should you need to make changes.

# Attempt

» Add Attempt/Status for this job

 Add Attempt Wizard 

✓

✓



✓

4

5

Select AddressUpload PhotoOutcomeOutcome DetailsFinish

## Enter Outcome Detail (Attempt)

Date/Time: Date:   Time:  

Frequent Items: 

<Select> ▼

Item:

← Prev

Next →

Here we will cover 'Attempt', 'Bad Address' and 'No Attempt/ Problem' types of attempts. For each of these the 'Outcome' screen looks much the same. You must fill out the date, time, and 'Item'. You may select 'Frequent Items' from the drop down if you wish.

The important thing to note is that 'Bad Address' or 'No Attempt/ Problem' will move the job out of your name. If you accidentally select these manners prior to entering all of your attempt reports you will have to contact a service coordinator to get the job moved back into your name.

Attempt » Add Attempt/Status for this job

 Add Attempt Wizard 



Select Address



Upload Photo



Outcome



Outcome Details



Finish

**We are almost done!**

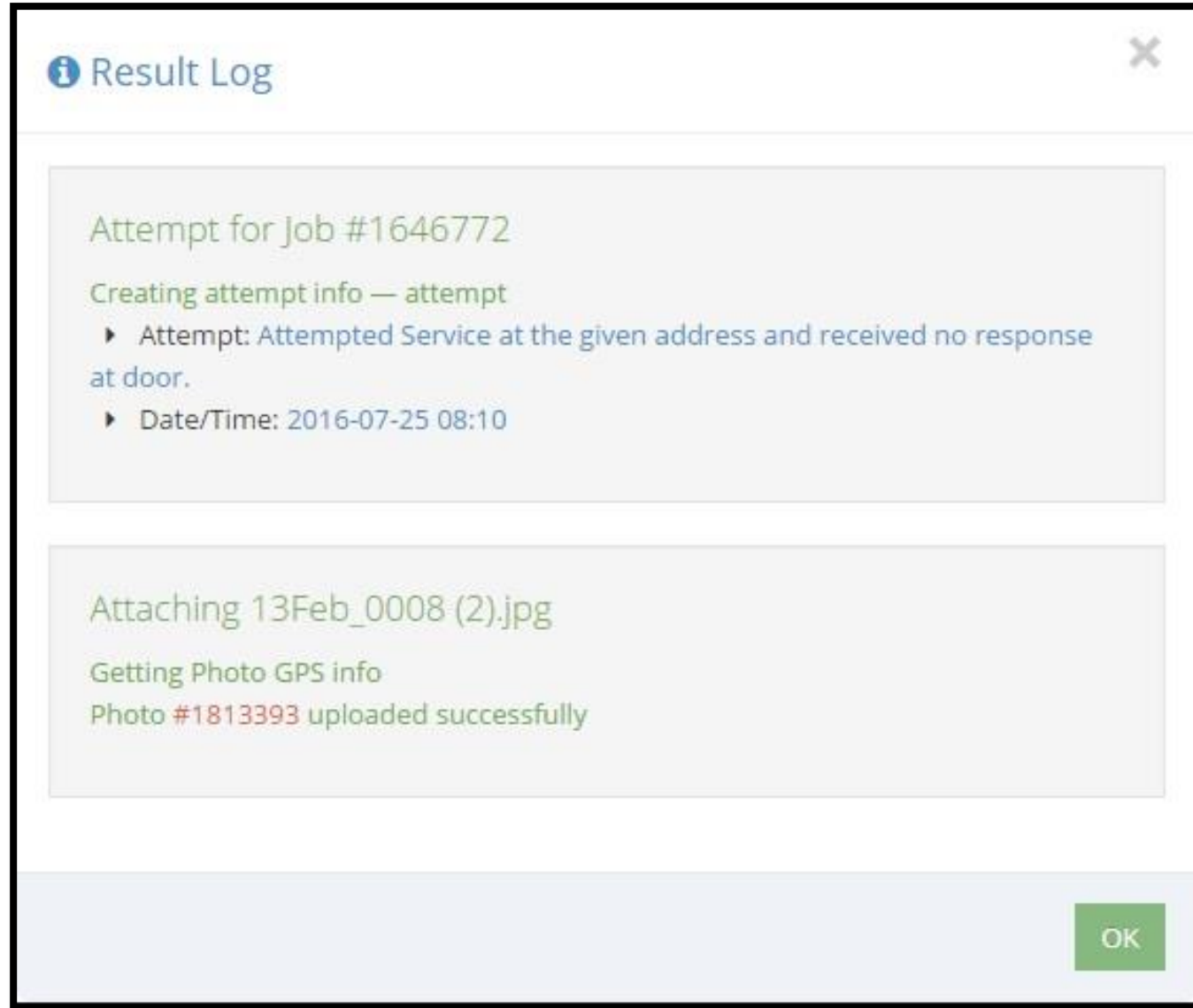
Please review your entries by clicking each of the Step Buttons and once you have confirmed click FINISH to finalize the Workorder. You may also save your steps as a TEMPLATE by selecting that option BEFORE choosing FINISH.

← Prev

Finish →

As with 'Served' types you will be given the chance to review your entries prior to clicking 'Finish'.

This is the only time you can make alterations. Once you select 'Finish' you will need assistance from a service coordinator to make alterations to the information you entered.



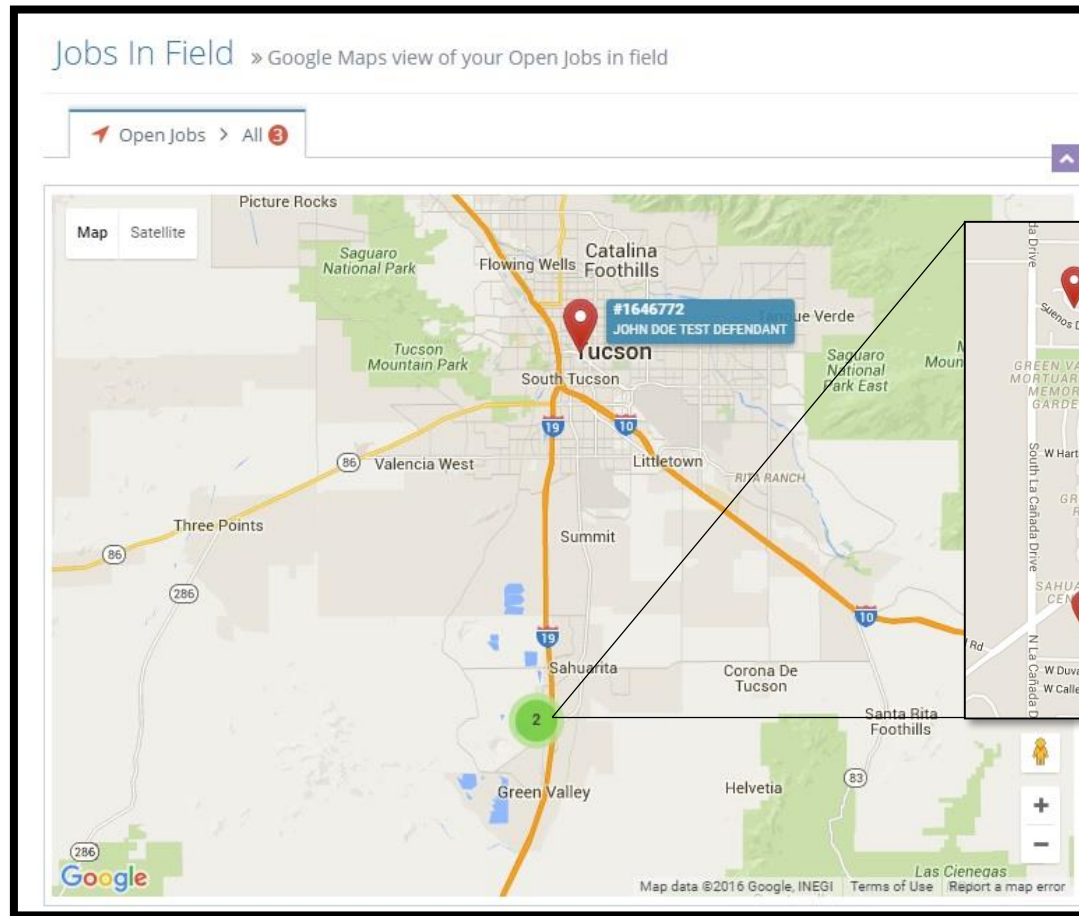
Select 'Finish' and you will be given a 'Result Log' pop-up that shows the information you entered. This will include the date, time, and what you typed in the 'Item' box. There will also be an indication of any attached photos.

Clicking 'OK' will take you back to the Job screen.



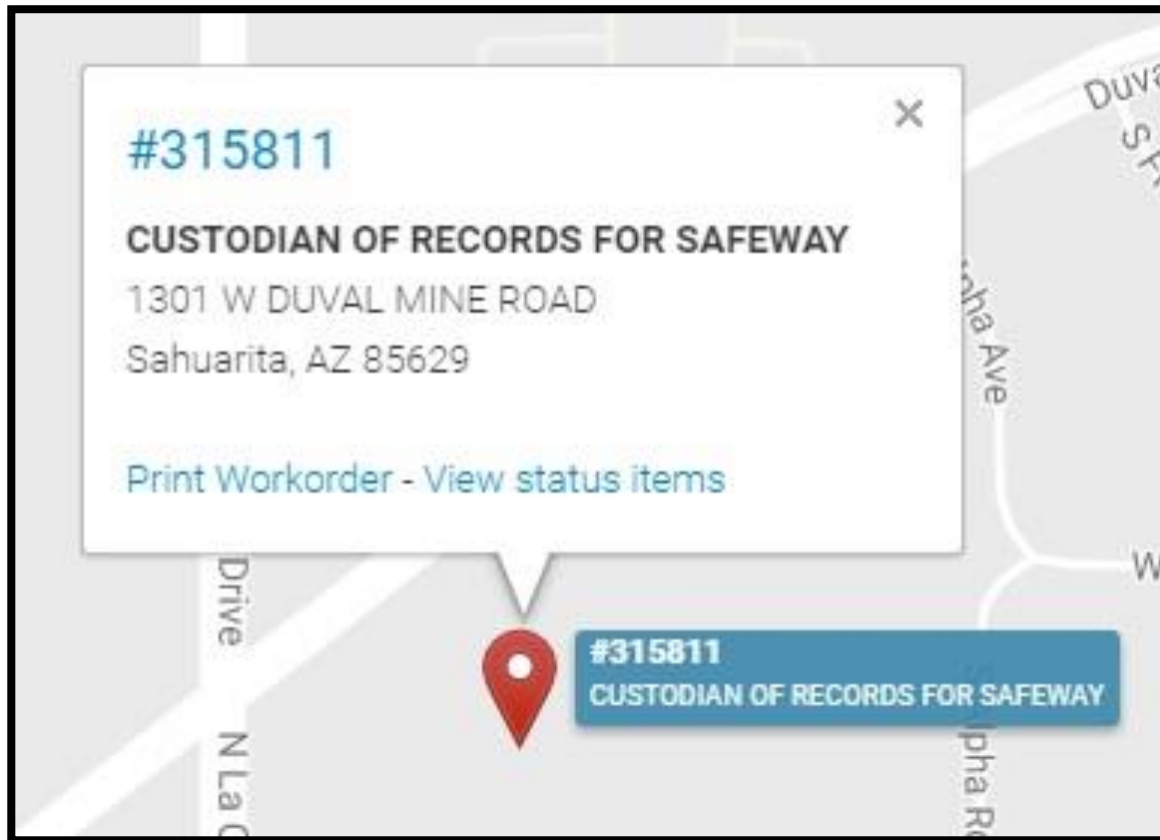
# JOBS IN FIELD

The 'Jobs In Field' link shows you a map of all jobs considered open (not served or non-served). The active address on the job is marked with a pin on the map. When multiple pins are in close proximity they are indicated by a circle with a number in it. Double clicking the number will re-center the map to expand the pins.



Our mapping uses the Google engine and will behave similarly, allowing you to re-center the map, scroll in and out, or even go to a street view (where available).

When you click on a job pin a detail box will come up. This box will include the name of the servee, the current active address, as well as 3 clickable links. We will cover additional screens later in the 'View Inventory' section of this presentation.



The top link (job number) takes you to the 'Job Info' screen in the 'Job summary'.

The 'Print Workorder' link will open a new browser screen with the appropriate workorder. The active address will be listed as #1 if there are multiple addresses.

'View status items' takes you directly to the 'Status' tab of the 'Job summary' screen.

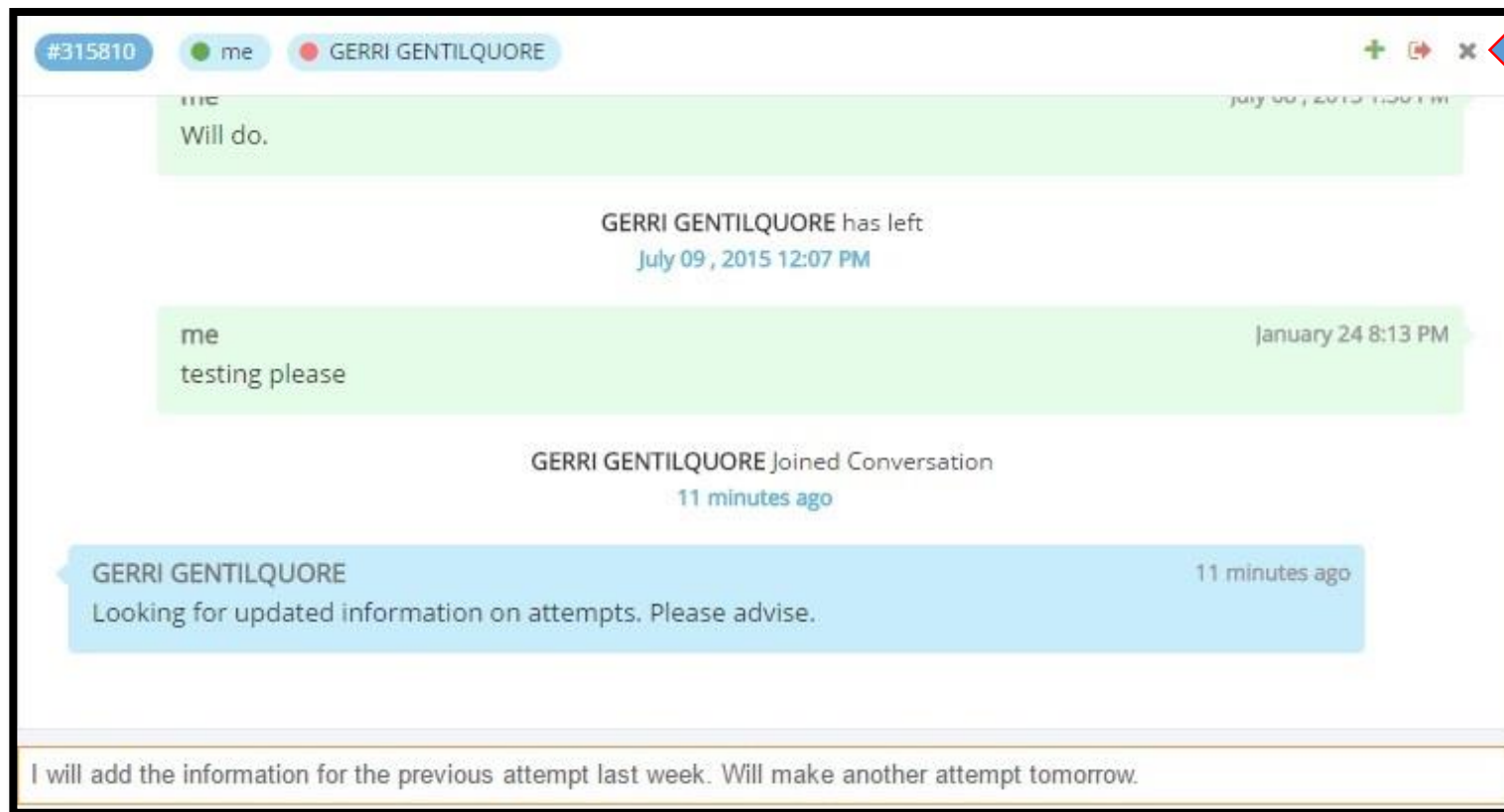


# CHAT

There is a chat feature available which will allow you to communicate with our service coordinators. A circle with a number will appear next to the word 'Chat' when there is a new message for you. New messages will have the name of the person who sent them on the left and the message will be in bold.

The screenshot displays the EZ Messenger web portal. On the left is a vertical sidebar with navigation links: Home, Upload Docs, Update Case Info, Attempt, Jobs In Field, Search My Jobs, Chat (highlighted with a green circle and the number 1), View Inventory, Commissions, Reports, and Tests (with a red warning triangle). The main content area is titled 'Chat' with a subtitle '» create conversation within our web portal'. Below this are tabs for 'All' (1), 'Holders' (1), and 'Servers'. A search bar is present. The 'Conversations' section shows two entries: one from 'GERRI GENTILQU..' with the message 'RE: Job #315810 (6) - Looking for updated information on attempts. Please advise' (1 minute ago), and another from 'me' with the message 'RE: Job #315811 (3) - Can you please ask the client for a phone number?' (3 minutes ago). At the bottom, it says '2 conversations — Load older conversations'. The footer includes '© 2015 EZ Messenger', links for 'Privacy' and 'Help', and social media icons for Twitter and Facebook.

When you click the message it will expand so you can read the information. You can respond to the chat in question by typing into the box at the bottom of the screen. Press [Enter] to send the chat back to the staff member who messaged you.



You can leave the conversation by clicking the orange arrow in the upper right. This will remove this conversation from the listing.

You can close the chat back down to one line by clicking the grey 'x'.

# VIEW INVENTORY

This will be one of the larger sections for us to cover. Several sections have been referred to previously and will be covered more in depth in these areas. From this screen you can:

- Download a .pdf version of your packing list
- Download a .csv packing list you can open from Excel
- Go to the Job summary screen
- View the active address in a Google map
- See what server a job is assigned to
- Accept the job
- Enter an attempt
- View documents
- View scans
- Open a chat dialogue

My Inventory » Your inventory of jobs from oldest to newest

[Download Packing List](#)

View My Inventory Columns CSV

Show 50 entries Search:

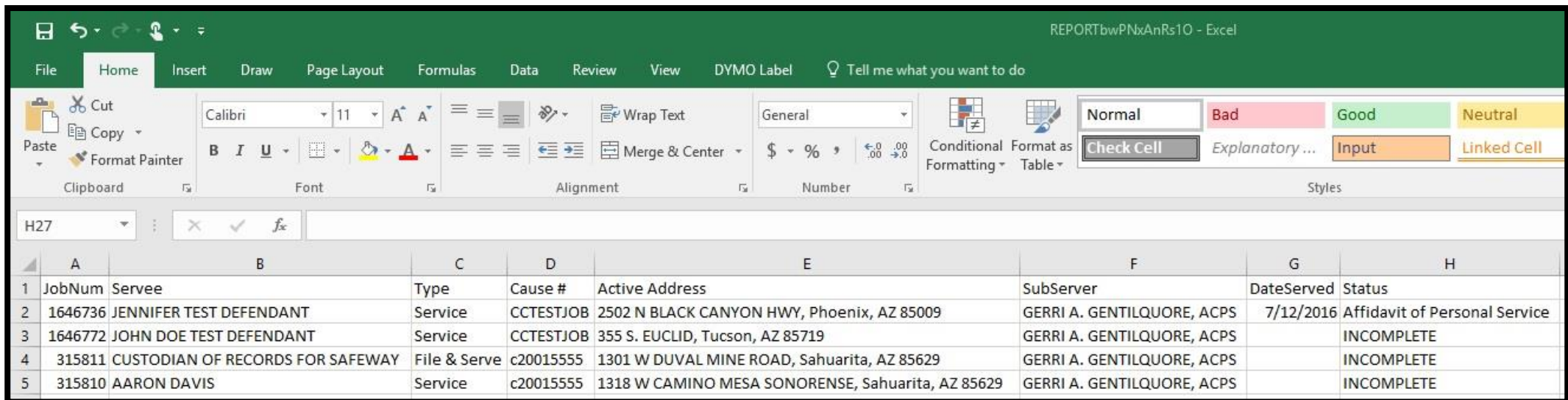
Job #	Servee	Type	Cause #	Active Address	SubServer	DateServed	Status	
1646736	JENNIFER TEST DEFENDANT Summons; Complaint	Service	CCTESTJOB	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	GERRI A. GENTILQUORE, ACPS	07/12/2016	Affidavit of Personal Service	✓ ✎ 📄 📷 💬
1646772	JOHN DOE TEST DEFENDANT Summons; Complaint	Service	CCTESTJOB	355 S. EUCLID, Tucson, AZ 85719	GERRI A. GENTILQUORE, ACPS		INCOMPLETE	✓ ✎ 📄 📷 💬
315811	CUSTODIAN OF RECORDS FOR SAFEWAY SUBPOENA DUCES TECUM; AFFIDAVIT OF CUSTODIAN OF RECORDS; LETTER DATED 12/9/2013	File & Serve	c20015555	1301 W DUVAL MINE ROAD, Sahuarita, AZ 85629	GERRI A. GENTILQUORE, ACPS		INCOMPLETE	✓ ✎ 📄 📷 💬

At the top of the screen you have the option to download a copy of the packing list. Your packing list will include any items, including outstanding affidavits. Items are color coded based on age. The older the item the darker the color. This will include some columns which differ from those displayed on the 'My Inventory' screen.

EZ Messenger											
Server Packing List Report											
07/27/2016											
GERRI A. GENTILQUORE											
JobNum	Servee	Active Address	SubServer	LastAttempt	DateAssigned	DueDate	HearingDate	DateServed	Status	AffBack	FVI
1646736	JENNIFER TEST DEFENDANT	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	GERRI A. GENTILQUORE, ACPS	07/12/2016	04/07/2016			07/12/2016	Affidavit of Personal Service	NO	0
1646772	JOHN DOE TEST DEFENDANT	355 S. EUCLID, Tucson, AZ 85719	GERRI A. GENTILQUORE, ACPS	07/25/2016	04/07/2016				INCOMPLETE	NO	0
315811	CUSTODIAN OF RECORDS FOR SAFEWAY	1301 W DUVAL MINE ROAD, Sahuarita, AZ 85629	GERRI A. GENTILQUORE, ACPS	07/23/2016	07/25/2016	12/12/2015	07/15/2016		INCOMPLETE	NO	0
315810	AARON DAVIS	1318 W CAMINO MESA SONORENSE, Sahuarita, AZ 85629	GERRI A. GENTILQUORE, ACPS	07/27/2016	07/25/2016				INCOMPLETE	NO	0
Thank you for choosing EZ Messenger, an Executive Process LLC Company.											

The .pdf version of your packing list will try to provide you information based on priority. Highest priority items will appear at the top.

The other form of download available is .csv. If you press the 'CSV' button in the upper right you will be able to download a copy of the list you can open in Excel. This download version has the same columns as the view on the 'My Inventory' screen. The information you find most useful to your current needs will determine which of these downloads may be of biggest benefit.



	A	B	C	D	E	F	G	H
1	JobNum	Servee	Type	Cause #	Active Address	SubServer	DateServed	Status
2	1646736	JENNIFER TEST DEFENDANT	Service	CCTESTJOB	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	GERRI A. GENTILQUORE, ACPS	7/12/2016	Affidavit of Personal Service
3	1646772	JOHN DOE TEST DEFENDANT	Service	CCTESTJOB	355 S. EUCLID, Tucson, AZ 85719	GERRI A. GENTILQUORE, ACPS		INCOMPLETE
4	315811	CUSTODIAN OF RECORDS FOR SAFEWAY	File & Serve	c20015555	1301 W DUVAL MINE ROAD, Sahuarita, AZ 85629	GERRI A. GENTILQUORE, ACPS		INCOMPLETE
5	315810	AARON DAVIS	Service	c20015555	1318 W CAMINO MESA SONORENSE, Sahuarita, AZ 85629	GERRI A. GENTILQUORE, ACPS		INCOMPLETE

If you click the servee name from the 'My Inventory' screen you will be directed to the 'Job Info' section of the 'Job summary' screen. Here you can view the case filing information, the attorney and secretary name, the name of the servee, the active address on the job, the disposition of the service, documents listing, and the server it is assigned to. You can use the tabs across the top to get to other information on this job, which we will cover shortly.

Job #1646772 » Job summary

Job Info Status Scans Photos 2 Addresses Linked Jobs Timeline

Case Info

Court	MARICOPA COUNTY SUPERIOR COURT
Cause #	CCTESTJOB
Date Filed	04/07/2016
Plaintiff(s)	AARON TEST PLAINTIFF
Defendant(s)	JENNIFER TEST DEFENDANT
Judge	
Attorney	Brandon C. Holub
Staff	Bidisha Banerjee
Case Ref #	

Job Info

JOHN DOE TEST DEFENDANT Open

Active Addr	355 S. EUCLID, Tucson, AZ 85719
Job Type	Service
Documents	Summons; Complaint
Received	April 07
Court Date	N/A
Reference #	TESTFILE
Server	GERRI A. GENTILQUORE
Commission	\$ 0.00 (0.00 paid)

This job is currently open

Use the paper clip icon to print a copy of the current work order.

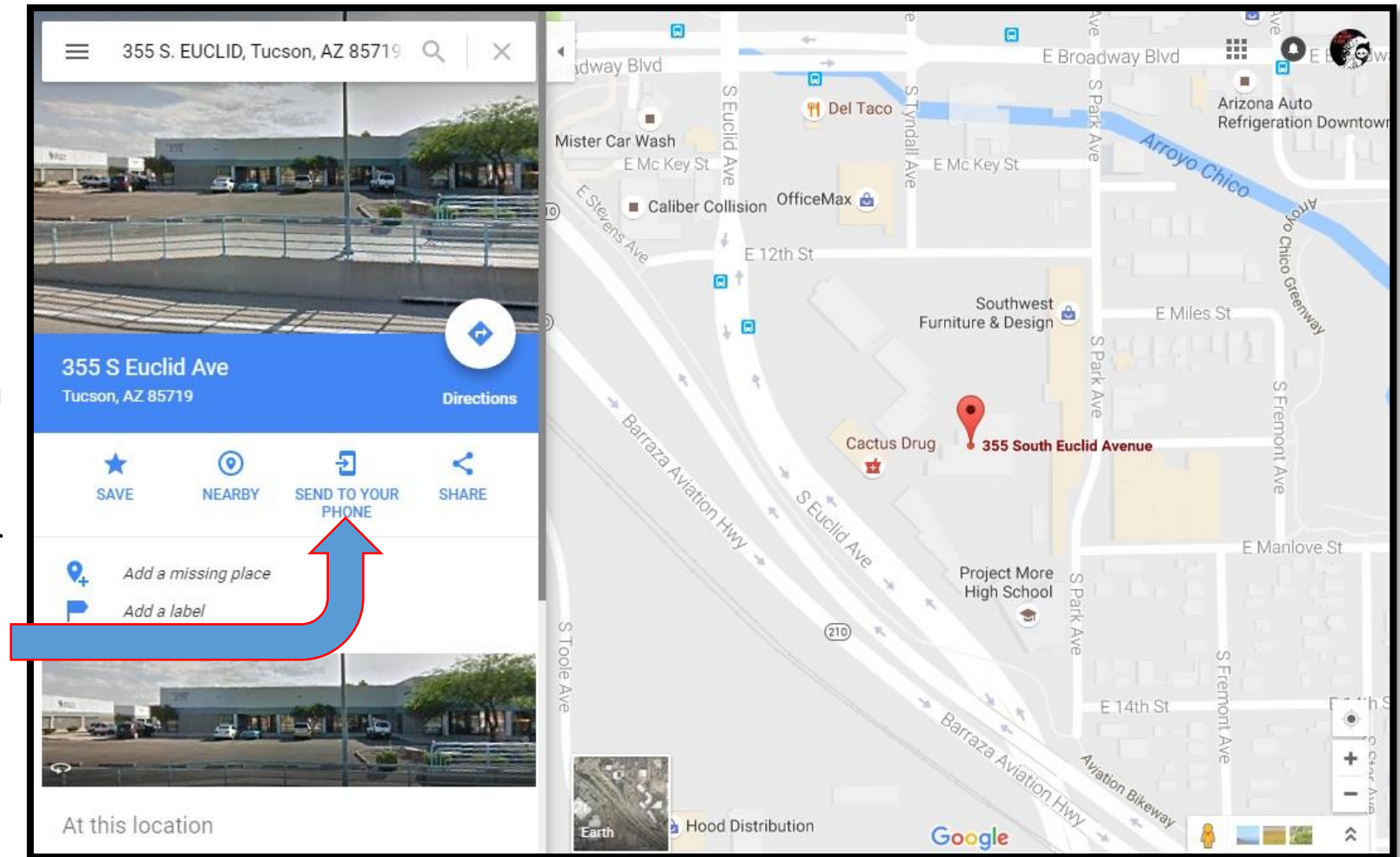
Next to that, if the job is completed, you can print the affidavit.

To the right of that you can access other forms including a status report.

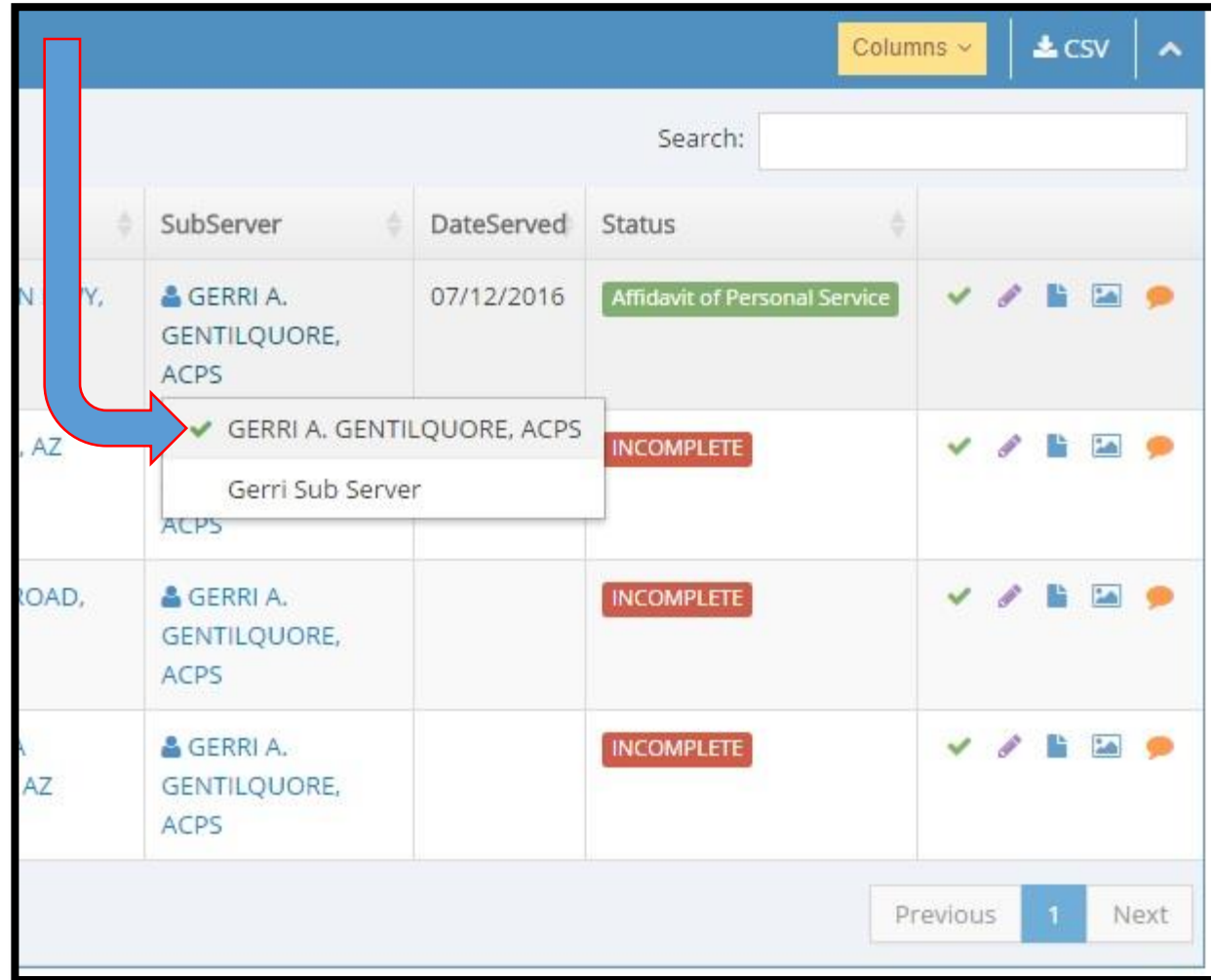


When you click the active address you will be taken to a new tab with a Google map. You can use the page to get directions, save the map to your places, send the map to your phone and look at street views.

If you send the map to your phone you will receive a notification from Google Maps and you can then navigate to the location, or save it in 'Your Places' in Google Maps to navigate to later.



If you happen to have multiple employees you can reassign the jobs easily by clicking on the name under 'SubServer'. You can change the name of the server each job is assigned to by clicking the appropriate server in the listing.



The screenshot shows a web application interface for managing job listings. At the top, there is a blue header bar with a 'Columns' dropdown, a 'CSV' button, and an upward arrow. Below the header is a search bar labeled 'Search:'. The main content area is a table with columns: 'SubServer', 'DateServed', 'Status', and an action column. A red arrow points to the 'SubServer' column, which has a dropdown menu open showing 'GERRI A. GENTILQUORE, ACPS' and 'Gerri Sub Server'. The table contains four rows of job listings. The first row is for 'GERRI A. GENTILQUORE, ACPS' with a 'DateServed' of '07/12/2016' and a status of 'Affidavit of Personal Service'. The other three rows are for 'GERRI A. GENTILQUORE, ACPS' with a status of 'INCOMPLETE'. The action column for each row contains icons for a checkmark, a pencil, a document, a photo, and a speech bubble. At the bottom of the table, there are 'Previous', '1', and 'Next' buttons.

	SubServer	DateServed	Status	
N Y,	GERRI A. GENTILQUORE, ACPS	07/12/2016	Affidavit of Personal Service	✓ ✎ 📄 🖼️ 💬
AZ	✓ GERRI A. GENTILQUORE, ACPS Gerri Sub Server		INCOMPLETE	✓ ✎ 📄 🖼️ 💬
ROAD,	GERRI A. GENTILQUORE, ACPS		INCOMPLETE	✓ ✎ 📄 🖼️ 💬
AZ	GERRI A. GENTILQUORE, ACPS		INCOMPLETE	✓ ✎ 📄 🖼️ 💬

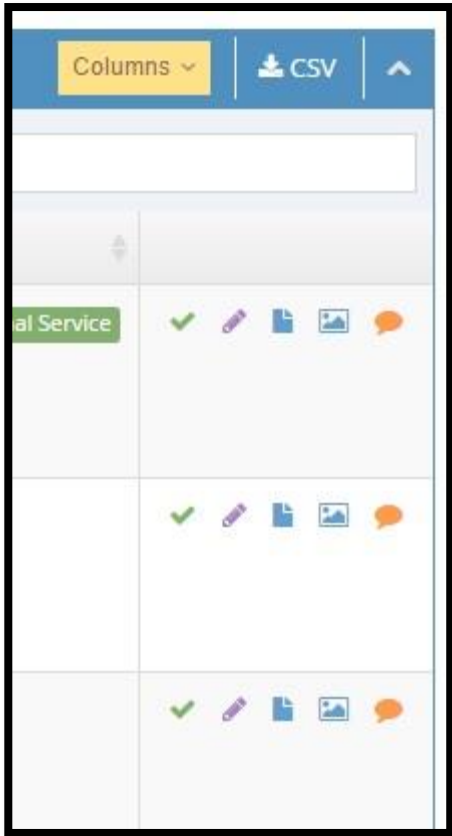
You can search your job listings by typing into the 'Search' box.

If the job is already served and pending affidavit the 'DateServed' column will be filled in.

The 'Status' will display here as well. 'Incomplete' (in red) indicates the job is open and needing attempts. Served or non-served statuses will indicate the appropriate state and be indicated in green.



On the far right of the screen you can perform several actions. We will cover from left to right with a brief explanation. Any items not previously covered will be reviewed in the following pages.



Farthest left is the 'Status' button. A green checkmark will indicate this job has been accepted. A thumbs up icon indicates the job still needs to be accepted. Click the thumbs up icon to accept the job and you will be redirected to the 'Job Info' screen.

Next over is the 'Add attempt' icon. This takes you to the 'Add Attempt Wizard' where you can add your attempt information.

Center icon is 'Scans'. This will take you to the 'Scans' for the job in question. You can upload or download the appropriate scans here.

Next icon is 'Photos'. This button will redirect you the 'Photos' screen to view the photos taken in regards to this job.

Last icon is the 'Start Chat' button. This redirects you to the 'Create conversation' window.

Job #1646736 » Job summary

Job Info Status Scans 1 Photos 7 Addresses Linked Jobs



Add Attempt Start chat

10 Items Total Forms Filter Status Type Columns

Show 50 entries Search:

Date	Type	Server	Address	Event
2016-07-28 10:12:48	SYSTEM EVENT	GERRI A. GENTILQUORE	NOT APPLICABLE, 99999	Subserver set to Gerri Sub Server v Server Portal
2016-07-12 11:16:17	Attempt	GERRI A. GENTILQUORE	NOT APPLICABLE, 99999	Test for app.
2016-07-11 18:57:07	Attempt	GERRI A. GENTILQUORE	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	test

- ☐ Attempt
- ☐ Misc
- ☐ SYSTEM EVENT
- ☐ Skip Trace
- ☐ COURT STATUS
- ☐ DASHBOARD MESSAGE
- ☐ Note From Client
- ☐ Chat Message

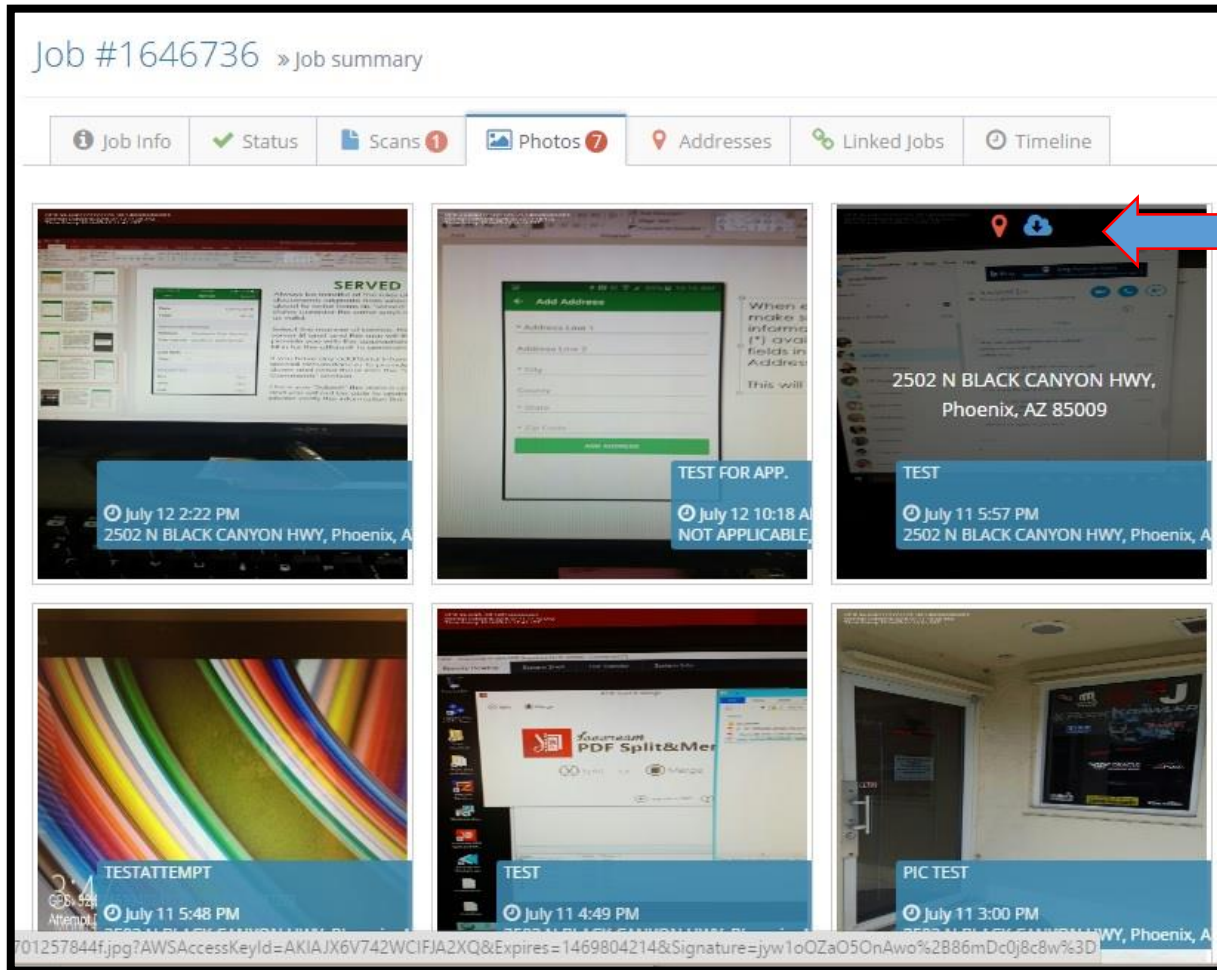


The 'Status' screen provides a listing of attempts already made on this job. The attempts include date, time, type, server name, address attempted, event and photo (when applicable). Every column is sortable.

You can also filter by status type in case you are looking for something specific.

You can print a status report using the 'Forms' button, get to the attempts wizard using the 'Add Attempt' link in the upper left, or open a chat dialogue using 'Start Chat'.

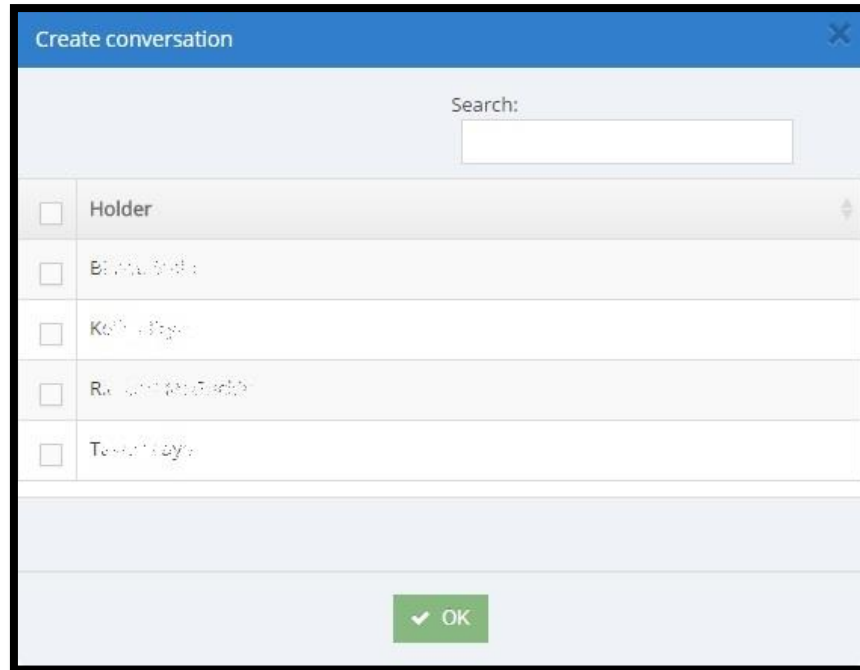
Like most other screens, you can also download the data in .csv or search.



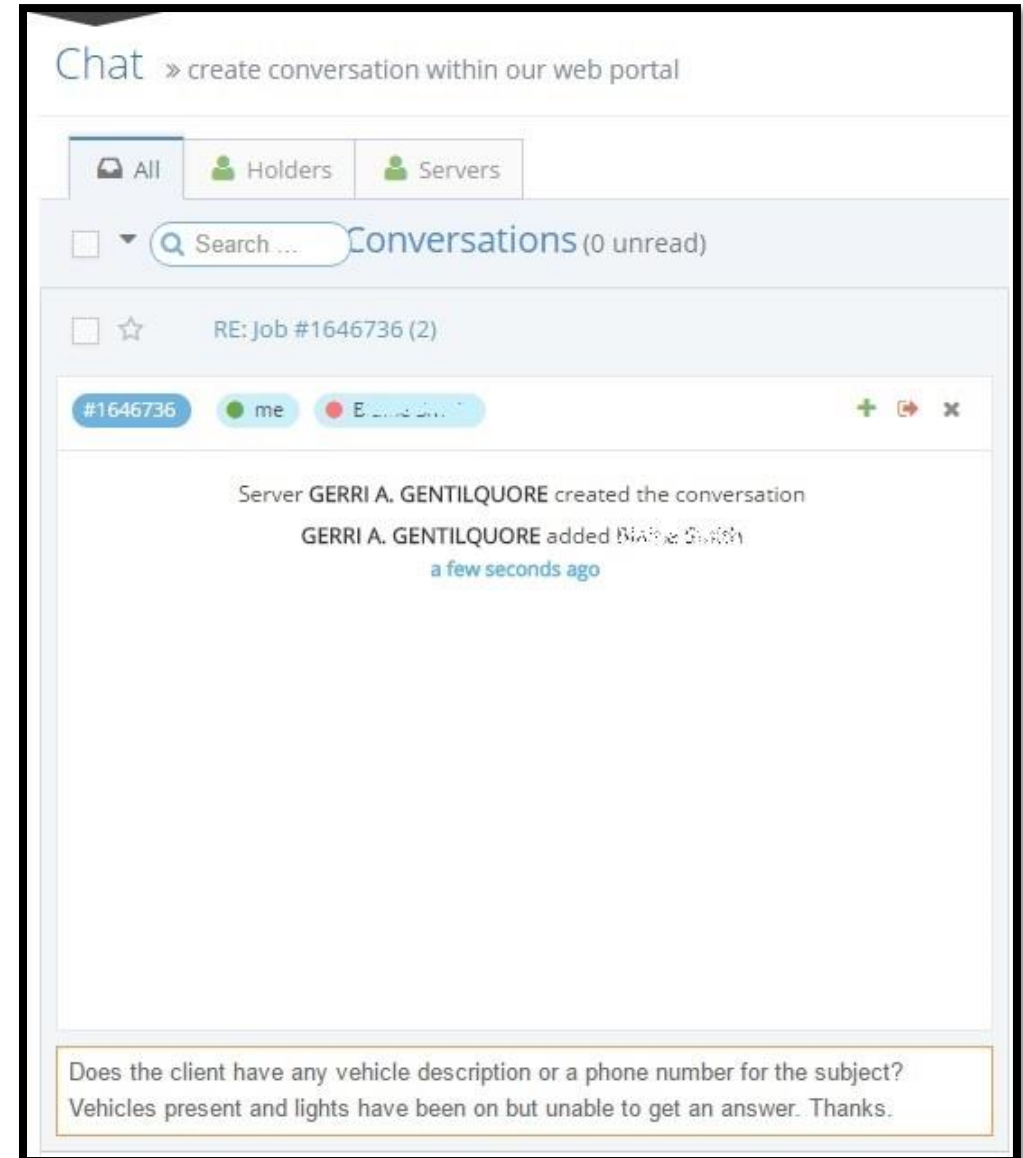
In the 'Photos' tab you can see photos taken for the job. Each photo shows partial text for the attempt, date, time, and address.

When you mouse over the photo it will slightly grey out the photo and the address will appear in text over top of the photo.

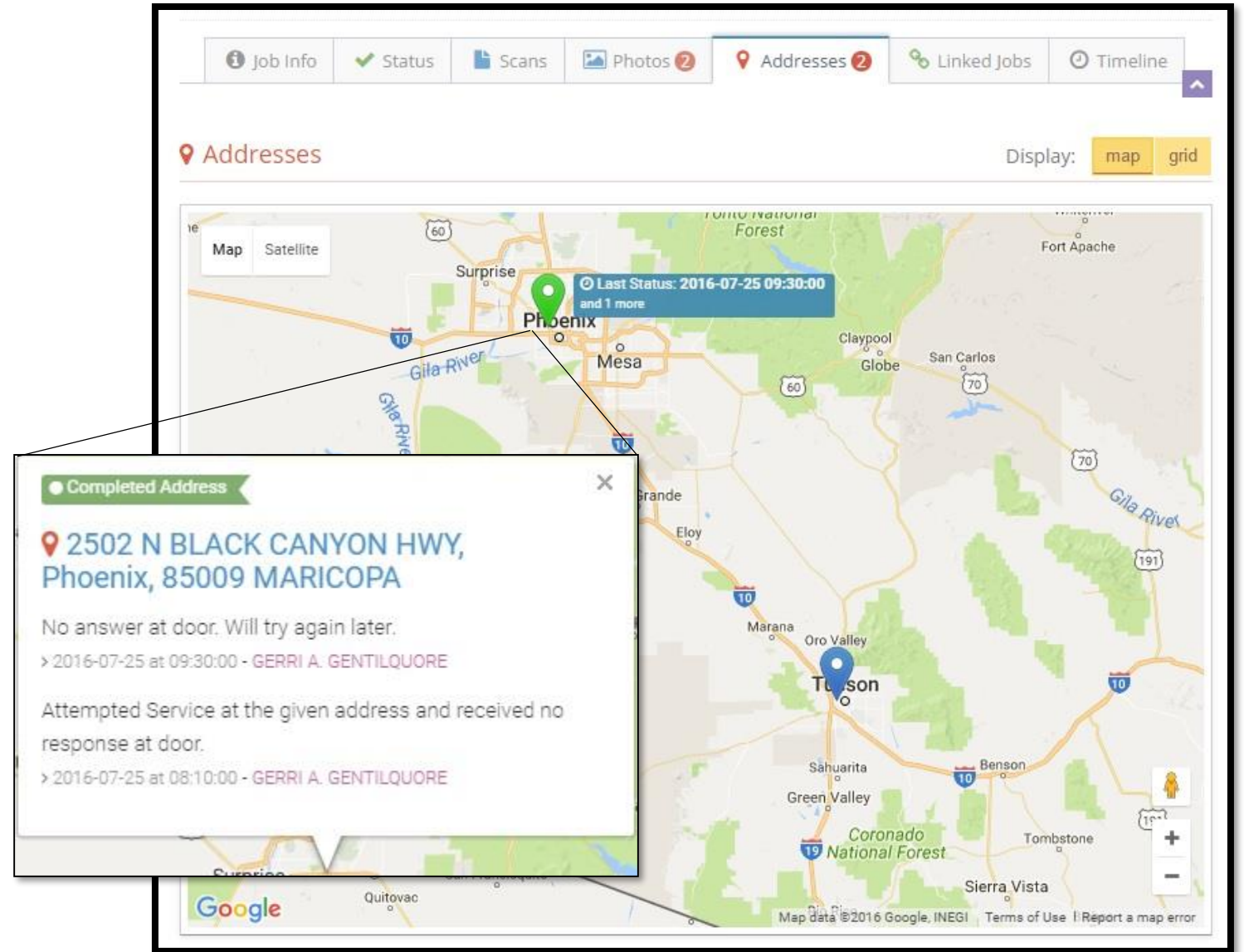
At the top of the photo you will have the option to click the pin to go to a map associated with the embedded photo GPS coordinates (not the address selected) or you can download a copy of the photo by clicking the blue cloud icon.



When selecting 'Chat' a box will pop up providing a list of the service coordinators for your area. Select one or more than click 'OK' and you will see a new window open that will allow you to type and send a chat message to the selected parties. Press [Enter] to send.



Another tab on the 'Job summary' screen is 'Addresses'. Each address listed in the job will be indicated by a pin on the map. If you click the pin a box will pop up including any recent attempt information with date, time, result, and server name.





In the 'Linked Jobs' tab you will see any jobs directly linked to the one you are currently working on. This screen will function the same as the inventory listings and contains the same information.

Job Info

Status

Scans

Photos 2

Addresses 2

Linked Jobs 1

Timeline

1 Job(s) related by Cause # or Reference #

Columns CSV

Show 50 entries

Search:

	Job #	Servee	Type	Cause #	Active Address	SubServer	DateServed	Status	
	1646736	JENNIFER TEST DEFENDANT Summons; Complaint	Service	CCTESTJOB	2502 N BLACK CANYON HWY, Phoenix, AZ 85009	GERRI A. GENTILQUORE, ACPS	07/12/2016	Affidavit of Non-Service	✓✎📄🖼️💬

Showing 1 to 1 of 1 entries

Previous1Next

Job Info

Status

Scans

Photos 2

Addresses 2

Linked Jobs 1

Timeline


Couple of Days Ago

Added Attempts

No answer at door. Will try again later.  
2502 N BLACK CANYON HWY, Phoenix, AZ 85009 Mon 25th 09:30 AM

Attempted Service at the given address and received no response at door.  
2502 N BLACK CANYON HWY, Phoenix, AZ 85009 Mon 25th 08:10 AM

Photo Submitted



June 2016

Added Attempt

> multi job select no gps  
355 S. EUCLID , Tucson, AZ 85719 Thu 9th 01:56 PM

The 'Timeline' is a slightly different way to look at the events on a job.

Within different sets of time items are broken down into type and listed within the timeframe sections.

# COMMISSIONS

Next item down on the 'Navigation Links' is 'Commissions'. This expands to 'Paid' and 'Unpaid'. Each listing is much the same, providing you with servee information, the type of item you got paid, the amount, date paid, any additional description and the original date the item was entered into our system. If the job is still in your name you will be able to click the servee name and go to the job itself.

Paid Commissions » View your paid commissions						
\$ Commissions Paid Columns CSV						
Show 50 entries			Search:			
Servee	Item	Amount	DatePaid	Description	DateEntered	
▶ <a href="#">ECAMAR, JOHN AND JANE DOE 1-3 AND H&amp;W</a> ORDER ON PLAINTIFF'S MOTION FOR ALTERNATE SERVICE; MOTION FOR ALTERNATE SERVICE; EXHIBITS 1-3; CIVIL SUMMONS; COMPLAINT; NOTICE TO ALL LITIGANTS. REQUIREMENTS TO APPEAL A DECISION OF THE JUSTICE OF THE PEACE; NOTICE TO THE DEFENDANT	Server Commission Address 1	\$10.00	🕒 2013-11-15	-	2013-10-26 08:35:31	
▶ <a href="#">JASON RAMON, JOHN DOES 1-3 AND JANE DOES A-C</a> (SPECIAL) FORCIBLE DETAINER SUMMONS; FORCIBLE DETAINER COMPLAINT; EXHIBIT A; RESIDENTIAL EVICTION INFORMATION SHEET; ATTACHMENT	Server Commission Address 1	\$14.00	🕒 2013-11-15	-	2013-11-04 08:35:34	
▶ <a href="#">WYCHITATOR, JOHN DOES 1-3 AND JANE DOES A-C</a> (SPECIAL) FORCIBLE DETAINER SUMMONS; FORCIBLE DETAINER COMPLAINT; EXHIBIT A; RESIDENTIAL EVICTION INFORMATION SHEET; ATTACHMENT	Server Commission Plus Zone	\$3.00	🕒 2013-11-15	-	2013-11-04 08:35:34	



# REPORTS

In the 'Reports' section you can access 'My Open Jobs', 'Priority Jobs', 'Affidavits Outstanding' and 'E-Sig Affidavits Outstanding'. 'My Open Jobs' functions much the same as the 'My Inventory' section except it will not show every job in your name, only jobs still classified as open. 'Priority Jobs' will take you to the priority listings as discussed previously. This leaves us 'Affidavits Outstanding' and 'E-Sig Affidavits Outstanding'. If you need to alter the name of the server click the server's name and select the right server. Check the box of the affidavit to be printed then click 'Print Selected Affidavits'. A new window with a .pdf of the affidavit will open for printing.

Affidavit Outstanding » Affidavits needed from Server

DataTable Result Set

Columns CSV

Show 50 entries

Search:

<input type="checkbox"/>	Job #	Servee	Date/Time	SubServer	Manner
<input type="checkbox"/>	1646736	JENNIFER TEST DEFENDANT 2502 N BLACK CANYON HWY, Phoenix, AZ 85009	2016-07-12 11:38:00	Gerri Sub Server	Personal Service

Showing 1 to 1 of 1 entries

Previous 1 Next

Print Selected Affidavits ...

Affidavits are legal documents and generally signed under penalty of perjury or a sworn statement with a notary. Always double check accuracy before signing and returning.

## Affidavit Outstanding » Affidavits needed from Server



DataTable Result Set

Columns

CSV

Show 50 entries

Search:

<input type="checkbox"/>	Job #	Servee	Date/Time	SubServer	Manner
<input type="checkbox"/>	1646736	 JENNIFER TEST DEFENDANT 2502 N BLACK CANYON HWY, Phoenix, AZ 85009	2016-07-12 11:38:00	 Gerri Sub Server	Non Service

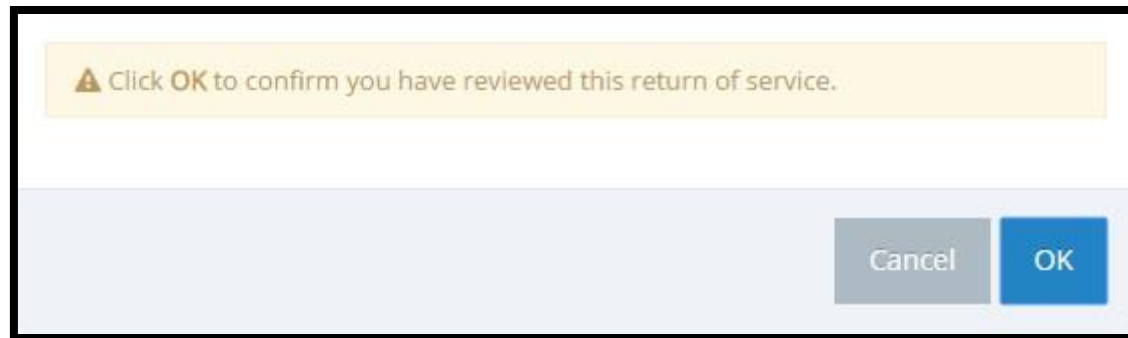
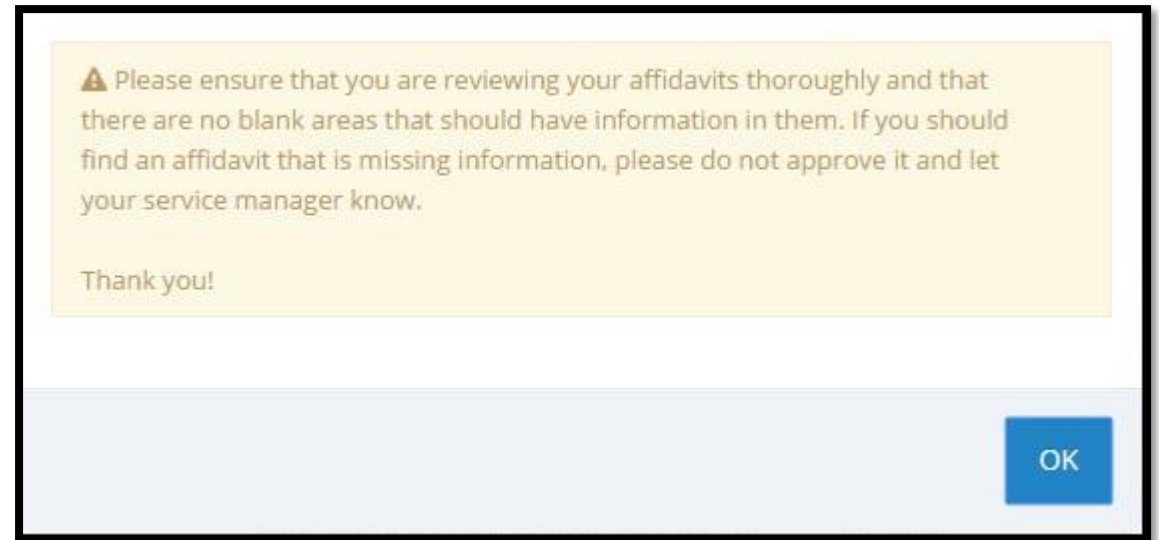
Showing 1 to 1 of 1 entries

Previous1Next

 Review & E-Sign Selected Affidavits ...

The 'E-Sig Affidavits Outstanding' is a little bit different. There are a couple of extra confirmation steps to take. First verify the server name is correct. Change to a different server if needed. Then select the job to e-sign and click the 'Review & E-Sign Selected Affidavits' button at the bottom of the list.

It is always easy to assume everything is fine on an affidavit. While most affidavits are likely correct, ultimately you are signing a legal document detailing what you did. Please double-check accuracy. After you click 'OK' here a new window pops up with a .pdf of your affidavit. Check it over, then you will have to re-enter your password to confirm it is you signing.



By clicking 'OK' on this box that comes up after you verify your account you will be confirming you have looked over your affidavit and that it is OK to send for e-filing.

# TESTS

MENU

Home > Employee Testing: View New Tests (9)

Search jobs...

View New Tests (9) » Employee Testing

You have test(s) that are already overdue, please take them before you proceed to your tasks. Contact office for more information.

Below are the tests required for you to take. Click the name of each item to proceed.

Name	<a href="#">TXOAG MCT102 Safeguarding Federal Tax Information for Service Vendors</a>
Testing Docs	<a href="#">Dec2015 TXOAG MCT102 Safeguarding Federal Tax Information Upload.pdf</a>
Deadline	<div><div></div>04/13/2016</div>
Passing Score	70.00
Highest Score	N/A
Description	The following test corresponds to the TX OAG Learning Management System MCT102.

Name	<a href="#">TXOAG MCT106 Discrimination and Harassment Awareness for Service Vendors</a>
Testing Docs	<a href="#">Dec2015 TXOAG MCT106 Discrimination and Harassment Awareness.pdf</a>
Deadline	<div><div></div>04/13/2016</div>

Name	<a href="#">TXOAG Customer Service Training for Service Vendors</a>
Testing Docs	<a href="#">CUSTOMER SERVICE TRAINING MANUAL_12.11.2015.pdf</a>
Deadline	<div><div></div>04/13/2016</div>
Passing Score	70.00
Highest Score	N/A
Description	It is advised that you read the Texas OAG Customer Service Plan prior to taking this test. All employees and Branch Affiliates are required to take this test to confirm basic understanding of EZ Messengers Texas OAG Customer Service Plan. Please note that some questions may have multiple correct answers, mark all that apply.

Name	<a href="#">TXOAG SOP102 FAMILY VIOLENCE - For Service Vendors</a>
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Sometimes as a server you will be asked to take testing with regards to new procedures, alterations to procedures, or items pertaining to certain clients. These new tests can be found in the 'View New Tests' section under the 'Tests' navigation link. Tests you have already taken and passed will appear in the 'View Completed Tests' area.

Clicking the 'Name' of the test will begin the testing procedure.

Clicking the 'Testing Docs' will download a .pdf of the related material.

Other information, such as the deadline for testing, passing score, your score, and a brief description are also found on this screen.

We appreciate your services and realize time is a hot commodity to a process server. Thank you for spending some of that time viewing this presentation.

If you need assistance on a job, or have questions regarding policy and procedure please contact your service coordinator who will be happy to assist you.

Your feedback and suggestions are valuable, welcome and encouraged.

Should you find any errors in this presentation, or any other distributed materials please notify your service coordinator who will relay the information to the appropriate staff.

