

# CLIENT WEB PORTAL

#### WELCOME SCREEN



## NAVIGATION LINKS

#### 🛗 Now: Dec 02, 2015

<b>^</b>	Home	Home	Returns you to the Home screen.
9	Jobs in Field	Jobs in Field	Map with pins representing active jobs out in the field.
<b>&gt;</b>	Send Us Work	Send Us Work	Online wizard for work submission.
Q	Check Status	Check Status	Search for jobs in a variety of ways.
	Check Venue	Check Venue	Tool for determining filing venue.
ľ	Document Center	Document Center	Access jobs in order to attach documents.
ľ	Export Documents	Export Documents	Documents for FTP exchange.
	Reports	Reports	Variety of standard or custom reports.
\$	Accounting	Accounting	View statement, payment, invoices and other accounting information.
	Job Scoring	Job Scoring	Rate the handling of a particular job.
•	Performance	Performance	Performance metrics specific to your jobs.

## NOTIFICATIONS



This quick link on the Home screen will display a snapshot of any new notifications since your last login. You can select to view items by clicking on the appropriate link or by selecting 'See all notifications' at the bottom which will take you to your 'Activity Feed'.

efresh Feeds						
♀ New Jobs 1	✓ Completions	🖋 Attempts	1 Status Items	Scanned Documents 6	🎦 Photos	\$ Invoice

#### JOBS IN FIELD

You can use the 'Jobs in Field' link to see a map with pins for where open jobs are taking place.

When you click on a pin it opens up a brief description of the Job Number, Servee, Address as well as quick links to get to the Job Summary screen, Print Workorder, and View status items.

Areas with a large circle and a number in the center are locations where there are multiple jobs in the nearby area. Scroll in on the map or click the number to zoom in. You can also select 'Map' or 'Satellite' views in the upper right corner of the map.



JObs In Field » Google Maps view of your Open Jobs in field

#### SEND US WORK

You can use our web portal to send requests to us to perform various services such as: service of process, skiptracing, document deliver or pickup, court filings and document retrieval. Follow the steps in the job wizard to set up a new request, or you can 'Use Template' to create, store and then later use templates for items that you may find you process frequently.

New Job Wizard Save As Template: U	
1     2     3     4     5     6     7     8     9       Special     Case Info     Filing Info     Skip Info     Service Info     Delivery Info     Upload     Your Info     Finis	

#### CHECK STATUS

You can either use the bubble in the upper right corner of the screen to find jobs to check status or or you can use our 'Check Status' feature.

By using the Check Status feature you can search for specific items based on multiple specific criteria as opposed to getting a shortened listing without details.

F.A.S.T. Client			La 18 Secome, Test Client
🛗 Now: Dec 02, 20	15	Home > Check Status	Q Search Jobs
🖀 Home		Check Status » sea	arch and check status of jobs
Jobs in Field			
Send Us Work		<b>Q</b> Search Fields	
<b>Q</b> Check Status		Search Query:	Search by Court Cause #
Check Venue		Status:	All Open Olosed
Document Cente	r		
Export Document	ts	Job Type:	Select •
Reports	<	Filter by Date Range:	NO
\$ Accounting	<		
1 Job Scoring			Q Submit
Performance			
(			
		© 2015 EZ Messenger Privacy	y 🔽

## SEARCH OPTIONS

#### Search Query

Search	by	Court Cause #
Search	by	Court Cause #
Search	by	Case Reference #
Search	by	Servee
Search	by	Plaintiff
Search	by	Defendant
Search	by	EZ Job #
Search	by	Invoice
Search	by	Court Date
Search	by	Reference #

#### Job Type Search

Select •	
Select	
App For Default	
Certified Mail	
Courier	
Delivery	
Document Retreival	
File & Serve	
Foreclosure Order Pull & File	
Garn	
Guaranteed	
Hawaii Service	
International - Hague	
International - Non Hague	
INTERROGATORIES	
Issue & Return	
Jail Serve	
Judgment	
Locate & Serve	
MESSENGER	
Misc. Filing	-

#### Date Range Search

Filter by Date Range:	YES
Date Range:	11/08/2015 - 11/17/2015
Search Type:	Search by Date Rec 🔹
	Search by Date Rec
	Search by Date Completed
	Search by Date Filed
	Search by Court Date

#### SEARCH RESULTS/ JOB DETAILS

#### Check Status » Search and check status of jobs



Search results will net a listing of related jobs with a snapshot of details such as Servee, Active Address, Status.

It will also provide quick links to Status, Documents, Affidavits and Photos.

<li>Job Info</li>	🗸 Status	🖹 Scans 2	🎦 Photos 46	Addresses 4	🗞 Linked Jobs 🕕	O Timeline
Case Info			~	Job Info	22 🗞 🖺 💲 🔺	Forms ~
Court	Test Cour	nty 100th TEST		C? Test Serve	Affidavit of Personal Sector	
Court Cause #	Case Test					
Date Filed	07/01/201	15		Active Addr	9 1234 Test, Bailey,	TX 75413
Plaintiff(s)	Any Plain	tiff		Job Type	Service	
Defendant(s)	Any Defe	odant		Documents	Test Docs	
Judge	Any Derei			Received	July 02	
Judge				Court Date	N/A	
Attorney	Attorney	2		Reference #	Job Law Firm Ref	
Staff	🚢 Secreta	iry 1		Server	📥 BRENDA NASH	
Case Ref #	Case Law	Firm Ref		Total Charges	\$ 95.00	
				Person Left With	NOT APPLICABLE  > Sex: Female  > Age: 30-40	<ul> <li>&gt; Skin: Cauca</li> <li>&gt; Hair: Blond</li> </ul>

#### JOB SUMMARY

When you select a job by clicking the serve name you are taken to the 'Job Summary' screen. This screen will provide you access to detailed information for the job including:

- Job Info  $\bullet$
- Status  $\bullet$

> Married: N/A

> Military: N/A

9876 Test Dr. Dallas, TX 75201

Affidavit of Personal Service

November 12 10:50 AM

> Other:

Served Address

Served On

Manner

> Weight: N/A

> Height: 5ft 5in

^

~

- Scans
- Photos  $\bullet$
- Addresses  $\bullet$
- Linked Jobs  $\bullet$
- Timeline  $\bullet$

ob #1181	3 » Job sun	nmary				
1 Job Info	✓ Status	Scans 2	Photos 46	Addresses 4	𝗞 Linked Jobs <b>()</b>	<ul> <li>Timeline</li> </ul>
Case Info			^	B Job Info	∞ 🖹 \$ ★	Forms ~
Court	Test Coun	ty 100th TEST		了 Test Serve	Affidavit of Personal Set	ervice
Court Cause #	Case Test					
Date Filed	07/01/201	5		Active Addr	9 1234 Test, Bailey,	TX 75413
Plaintiff(s)	Any Plaint	iff		Job Type	Service	
Defendant(s)	Any Defen	ndant		Documents	Test Docs	
	,			Received	July 02	
Judge				Court Date	N/A	
Attorney	Attorney 2	2		Reference #	Job Law Firm Ref	
Staff	📥 Secreta	ry 1		Server	🚢 BRENDA NASH	
Case Ref #	Case Law	Firm Ref		Total Charges	\$ 95.00	

Person Left	NOT APPLICABLE	
With	> Sex: Female	> Skin: Caucasian
	> Age: 30-40	> Hair: Blonde
	> Married: N/A	> Weight: N/A
	> Military: N/A	> Height: 5ft 5in
	> Other:	
Served Address	9876 Test Dr, D	allas, TX 75201
Served On	November 12 10:	50 AM

Manner

Affidavit of Personal Service

# JOB INFO

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#### Case Info

- Court cause number
- Filing information
- Case caption
- Attorney on case
- Case reference number

#### Job Info

- Quick Links to:
- Insert status note
- View Workorder
- Print affidavit
- Job scoring
- Forms
- Name of serve
- Active Address
- Job type
- Documents
- Court date
- Server
- Service details



Send notes to EZ Messenger staff using the 'Insert Status Note' link. The 'High Priority' button should be selected for any items requiring rush attention.

## STATUS

You can view various forms of status with dates and times. Statuses can be sorted and filtered in various manners.



## SCANS

Any scans currently attached to the job can be viewed here. You can also upload additional scans as needed.

# Job #906004 » Job summary I Job Info Status Scans (4) Photos (2) Reprose OCRPROOF

926381564b60.pdf - 383.86 KB

#### () an hour ago O an hour ago OCRPROOF OCRPROOF 798858564b5b.pdf - 383.86 KB 358069564aa.pdf - 0.01 KB () an hour ago O 14 hours ago 1 Upload Files Drop files here or click to choose Upload Files

504094564b5a.pdf - 383.86 KB

Timeline

#### Job #906004 » Job summary



Scans 🕘

Photos 2 9 Addresses

Linked Jobs 🛛 🖸 Timeline

#### PHOTOS

View photos associated with attempts and service completions. Photos are geotagged and have the status note, date, time, and address of attempt.

 O 14 hours ago

 1600 DALE ST APT 141, AMARILLO, TX 791

## LINKED JOBS

If you have jobs with identical forms of identifiers they will appear here. In this example job 315810 has the same reference number as the service listed below. Job #215010

Jobs may link based on Case Number or Reference Number. This does not force the jobs to be part of the same case, but rather provides an easy way to find jobs with matching information.

	🕽 Job Info 🛛 🖌 Stat	tus 📫	Scans 🕄 🛛 🔛	Photos 14	Addre	esses 🕗 🍾	Linked Jobs 🔞	O Timelin	e		
6	3 Job(s) related by Co	ourt Case	# or Reference	2 #				C	olumr	is ~	
IOV	v 10 • entries	5					Search:				
	Servee	Ref #	Туре	Cause #	Assigned	Active Address	Status				
3	CUSTODIAN OF RECORDS FOR SAFEWAY SUBPOENA DUCES TECUM; AFFIDAVIT OF CUSTODIAN OF RECORDS; LETTER DATED 12/9/2013	123654	Subpoena	C2013- 1973	08/24/2015	Signature 355 S. EUCLID , Tucson, AZ 85719	Affidavit of Pers	onal Service	*		
3	NOT APPLICABLE MTC NOH	123654	ONLINE SUBMISSION		06/30/2015	♥ NOT APPLICABLE, , 99999	Special Messen	ger Service	-		
3	NOT APPLICABLE	123654	ONLINE SUBMISSION		06/30/2015	♥ NOT APPLICABLE, , 99999	Special Messen	ger Service	*		



## TIMELINE

The Timeline shows a chronological listing of events on the selected job.

#### Check Venue » Welcome to Court Venue Search

arch Fields		
All fields are required he	ere.	
* Address:		
	City	Choose State
3alance: (e.g. 1024.36)		
Client Reference Number:		

## CHECK VENUE

By using our Check Venue tool you will be able to enter an address, the balance being collected and your reference number (optional) to obtain information on the venue your case should be filed in.



#### REPORTS

EZ Messenger offers a multitude of standard reports for your account. Don't see the type of report you need? You may want to check the Performance link or ask your Account Executive about creating a custom report!

🛗 Now: Dec 02, 2015		Home > Accounting > Accounting: View/Pay All Open Invoices							Q Search Jobs		
A	Home	Vie	View/Pay All Open Invoices » Accounting stuff								
9	Jobs in Field										
•	Send Us Work	🖨 Pr	int S	tatement		Dange Range: 🛗					
Q	Check Status										
	Check Venue	All C	All Open Invoices								
ß	Document Center	Shov	Show 10  v entries				Search:				
	Export Documents	cport Documents		Invoice #	Reference	JobNum 🍦	Invoiced $\Leftrightarrow$	Original Amount	Balance 🔶		
	Reports <	0	1200		1200	846455	<b>2</b> 2015-11-19	\$117.00	\$117.00		
\$	Accounting 🗸 🗸	0		<b>0</b> 1042055	Job Law Firm Ref Job Company Ref Case Law Firm Ref	11813	<b>2</b> 2015-11-16	\$95.00	\$95.00		
-	View Vendor W9	0	•         •         •		123654	315811	<b>2</b> 2015-11-16	\$95.00	\$95.00		
1	View/Pay All Open Invoices	0			Test123	19323	<b>2</b> 2015-11-09	\$95.00	\$95.00		
-	Statement History	0			JD2256	809214	<b>2</b> 2015-11-09	\$82.00	\$82.00		
-	Payment Summary	<ul> <li>         • 102         •         •         •</li></ul>		1022531	test job	888213	<b>2</b> 2015-11-03	\$117.00	\$117.00		
-	Reconciliation Detail	0		1012347	test migration file	782249	<b>2</b> 2015-10-29	\$82.00	\$82.00		
	Check # Search	0		<b>1</b> 009465	SAMPLE CLIENT FILE NO SAMPLE CLIENT FILE NO	861979	<b>2</b> 2015-10-28	\$70.00	\$70.00		
1	Job Scoring	0		<b>0</b> 981065	1200	846441	<b>2</b> 2015-10-19	\$50.00	\$50.00		
<b>B</b>	Performance	0		<b>0</b> 971589	SAMPLE CLIENT FILE NO SAMPLE CLIENT FILE NO	861979	<b>2</b> 2015-10-14	\$70.00	\$70.00		
2	Showing 1 to 10 of 16 entries								2 Next		

## ACCOUNTING

We make it easier than ever to review your accounting details. In our Accounting section you can find our W9, review invoices, statements and payments. You also have access to reconciliations and can search for check numbers used for payments on your account.

5811 Scoring » Add your score for this job										
Was processing/filing completed in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										
Once processed/filed was job placed out for service in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										
Once assigned to the process server was the first attempt completed in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										
Overall were service, non service or alt service attempts completed in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										
Once completed was an affidavit turned in by the server in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										
• Was affidavit processed to court/client in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										
Once affidavit was routed to court did we receive and process a file marked copy in an acceptable time frame?										
Exceptional Acceptable Marginal Unacceptable N/A										

#### JOB SCORING

One of our newest features is our Job Scoring. After your job has been completed you can provide feedback on various aspects of your service.

pen cases		Cases at court		Cases in field		Batch import	
24		0		11		11	
re Judgment	24	Pre Judgment	0	Pre Judgment	11	Pre Judgment	11
ost Judgment	0	Post Judgment	0	Post Judgment	0	Post Judgment	0
Deta	ls	Deta	ils	Detai	ls	De	tails
5 Average da		Avg. days		Avg. days	in field		5 batch import
5	0	0	0	1	0	5	0
Pre Judgment	Post Judgment	Pre Judgment	Post Judgment	Pre Judgment	Post Judgment	Pre Judgment	Post Judgmen
	In client hold		Other queues		Closed jobs		
	0		2		1		
	Pre Judgment	0	Pre Judgment	2	Pre Judgment	1	
	Post Judgment	0	Post Judgment	0	Post Judgment	0	
	Detail	s	Detai	ls	Details		
	0				10	0	
	Avg. days in cli	ient hold	Avg. days in other queues		Percent served		
	0	0	1	0	(100	0	
	Pre Judgment F	Post Judgment	Pre Judgment	Post Judgment	Pre Judgment	Post Judgment	

## PERFORMANCE

Performance Metrics snapshot for your account can be seen here.

Details in regards to each type of metric can be accessed by clicking the blue 'Details' link.

## PERFORMANCE METRICS DETAIL

After you select 'Details' you will see a listing of the total items that make up the section in question. You can view job details, status, attached scans and photos. You can also download a .CSV file to open in Excel.

Performance Metrics Detail - jobs_closed30									
Servee	ClientReference	JobType	CaseNo	DateAssigned	ActiveAddress	Manner			
James Smith Dependency petition	JD2256	Service	JD22556	2015-11-05 21:59:02	123 Main Street Tucson, AZ 85719	Non Service	~	1	\$
0	5816456	File & Serve	2015- 20115	2015-11-05 22:54:45	,	Special Messenger Service	*	1	\$

🛓 Download CSV