Cheetah Service Desk User Guide

This user guide covers the MercuryGate Cheetah Service Desk module. Cheetah Service Desk allows SSC associates transparency to the status of customer ETAs and Moves providing the ability to better assist customers with real time information on container and driver current location, more accurate arrival times and up to date information on any possible delays.

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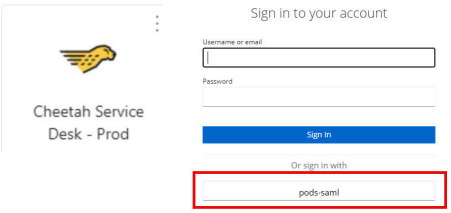
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Service Desk Overview



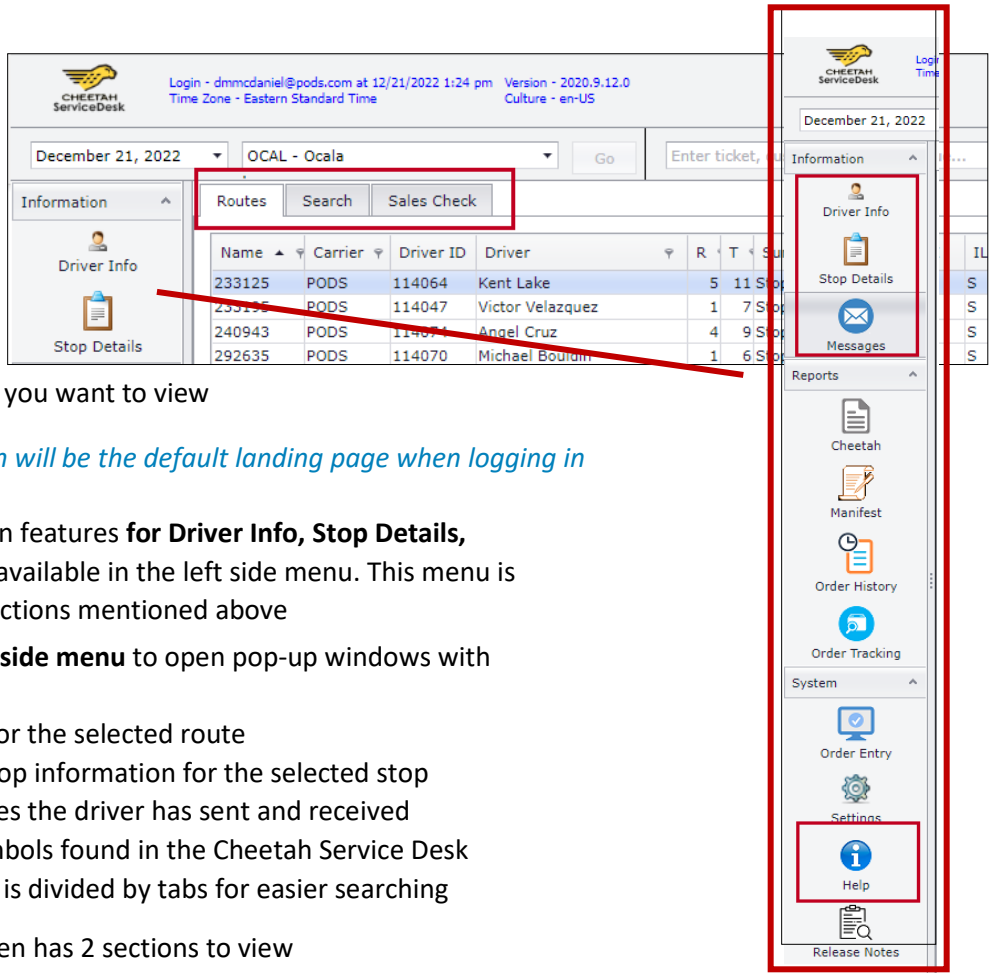
Login – Use the steps below to login into Service Desk

1. **Click** the Cheetah Service Desk Icon in MyApps, and then click pods-saml.

Navigating the Screen

- **Tabs -** The **Service Desk** screen is broken into sections with with tabs in the top menu for the main sections of **Routes, Search,** and **Sales Check**.

1. **Click** on the **tabs** in the **top menu** to select the page you want to view



*Tip: The **Routes** screen will be the default landing page when logging in*

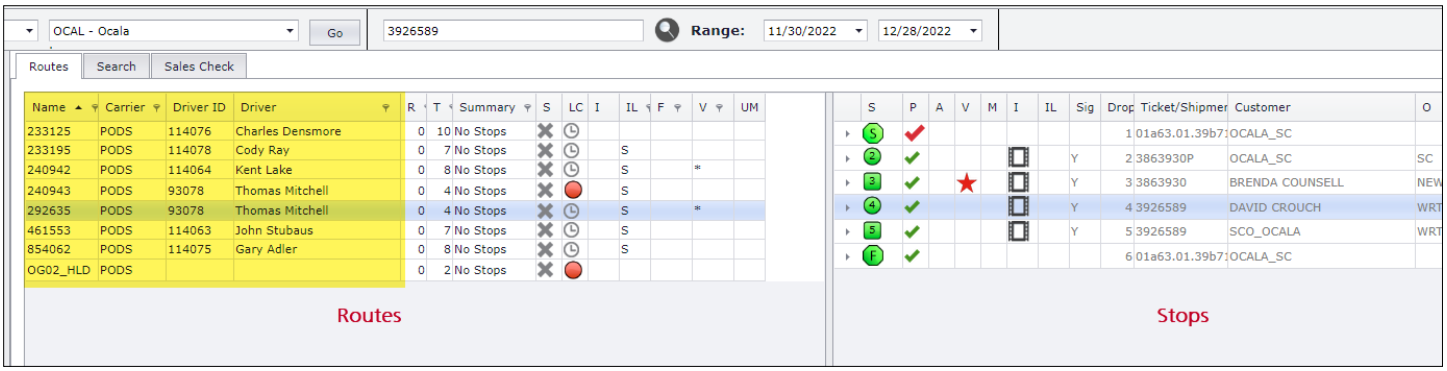
- **Left Menu -** Additional navigation features **for Driver Info, Stop Details, Messages**, and system **Help** are available in the left side menu. This menu is available on each of the three sections mentioned above

1. **Click** on the **icons** in the **left side menu** to open pop-up windows with additional information
   a. **Driver Info:** Driver info for the selected route
   b. **Stop Details**: Detailed stop information for the selected stop
   c. **Messages**: View massages the driver has sent and received
   d. **Help**: Explanation of symbols found in the Cheetah Service Desk application. Information is divided by tabs for easier searching

- **Routes Screen -** The Routes screen has 2 sections to view

Routes: List of routes for all individual drivers in the selected Storage Center on the selected date

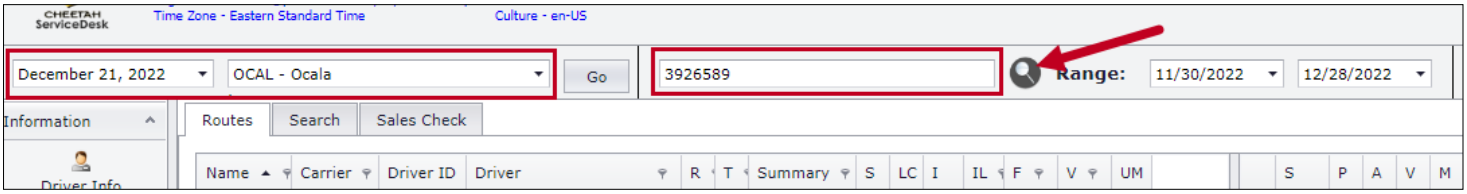
Stops: List of stops for a highlighted driver in the route list



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Search

Quick Search – Use this process to find current customer order information using **Customer Name, Address, Phone Number, Email, Order Number, or Move Number** from the **Search Bar** at the top of the page

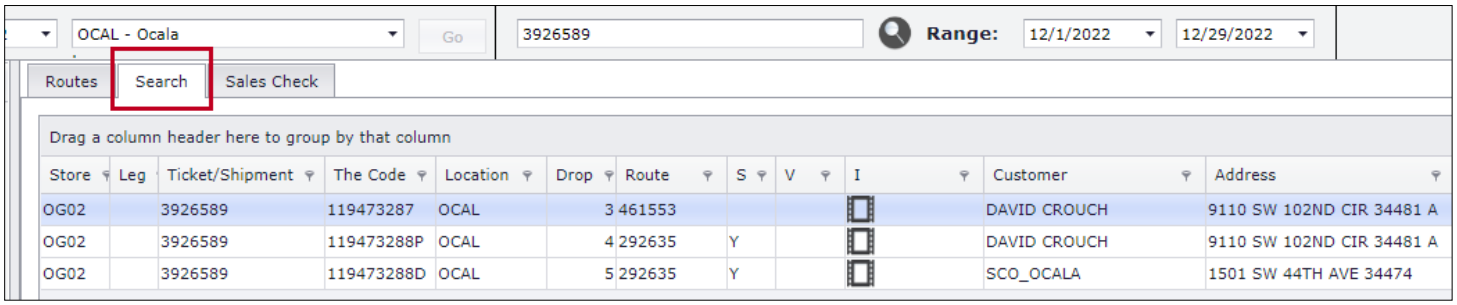


1. **Click** the **Calendar dropdown** to select the date
2. **Select** the **Location** from the dropdown list
3. **Input** the **search criteria (Customer Name, Address, Phone Number, Email, Order Number, or Move Number)** and **click** the **Search icon**

*Tip: When searching **Customer Name** use both **First Name and Last Name**. Last Name only will NOT return results.*

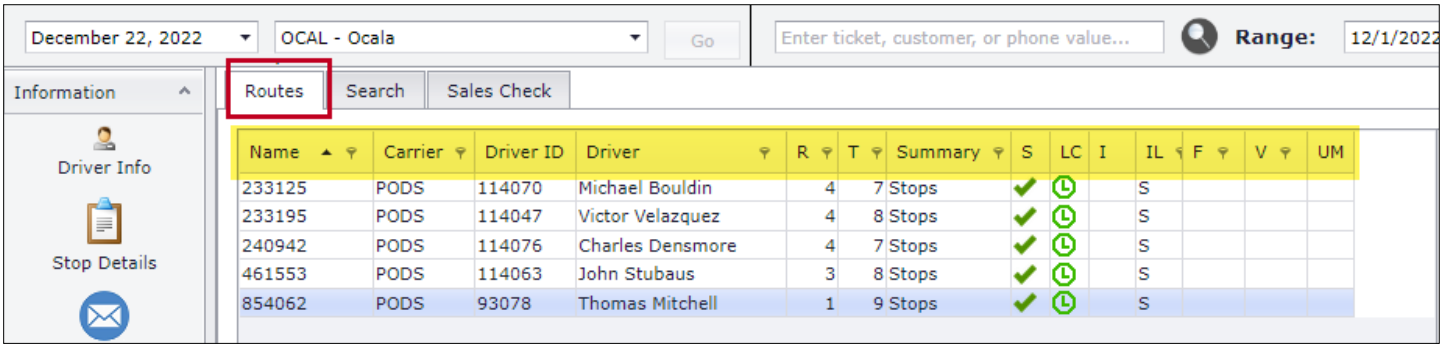
Search text must be more than 4 characters.

4. The system will bring up the **Search tab** to display the results



Routes

The left side of the **Routes tab** displays a list of routes for all drivers in the selected Storage Center and date



Column Headers Overview

- **Name:** Route/Truck #
- **Carrier:** PODS
- **Driver ID:** Driver RBMS ID #
- **Driver:** Driver Name
- **R:** Remaining # of Stops
- **T:** Total # of Stops
- **Summary:** Activity
- **S:** Route Status
- **LC:** Last GPS Fix
- **I:** Image or Media
- **IL:** Image Level Indication
- **F:** Flash
- **V:** Notes
- **UM:** Unread Message

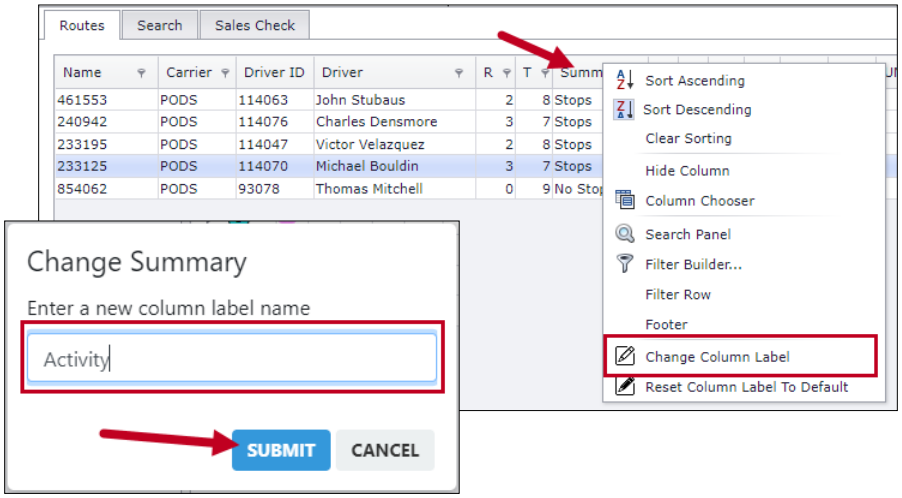
Tip: Click on the Help Icon in the left menu to see symbol definitions.

*Columns V & F can be hidden using the right click menu. See **Change Column Headers** for more info.*

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Change Column Headers – Customize the column headers and labels for any of the tables in Cheetah Service Desk

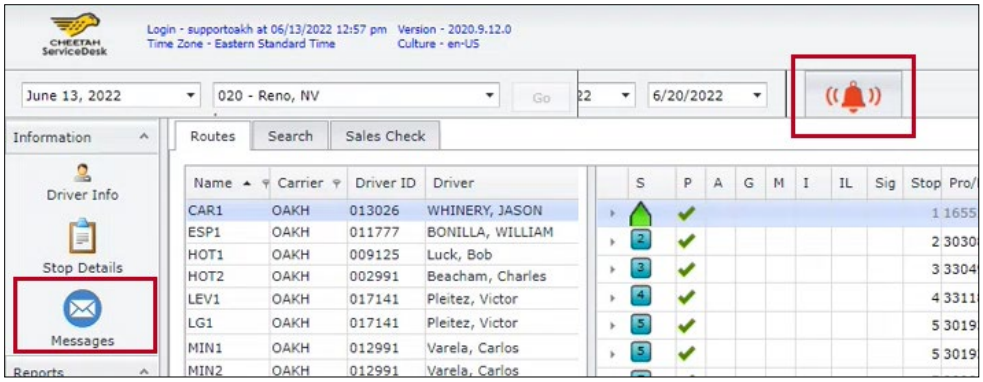
1. **Right click** on the **column header** you want to change to open the pop-up column menu
2. **Select Change Column Label** from the menu
3. **Input** what the **new name** you would like the column header to display in the text field and **click Submit** to save – In this example we've changed the Summary column to Activity

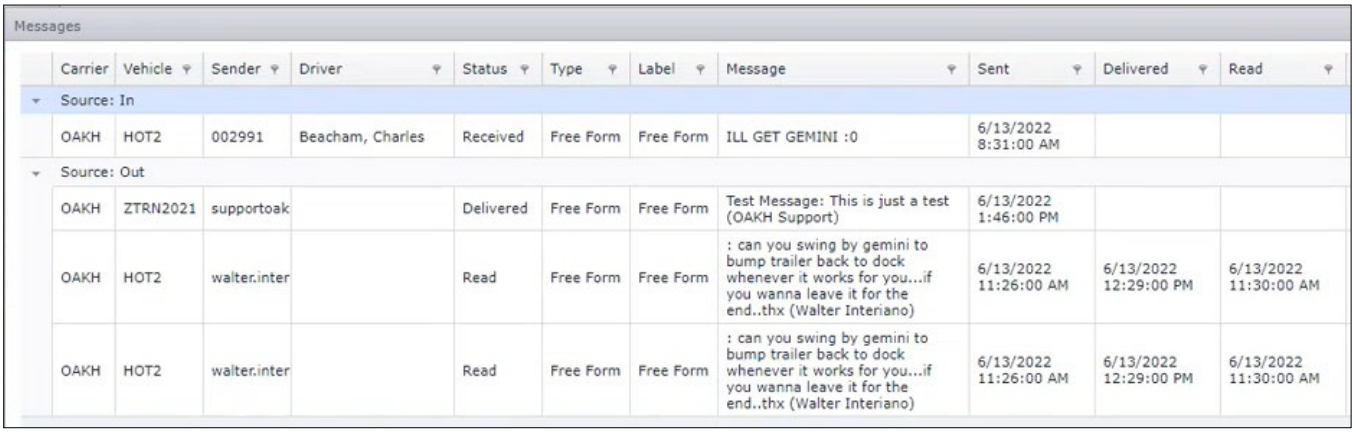


View Messages – View Messages to and from the selected driver

1. **Click** the **Messages icon** in the left menu to display all messages for a highlighted driver

Tip: The bell icon will appear next to the search bar when a new message is received. Click the bell to view the new message.



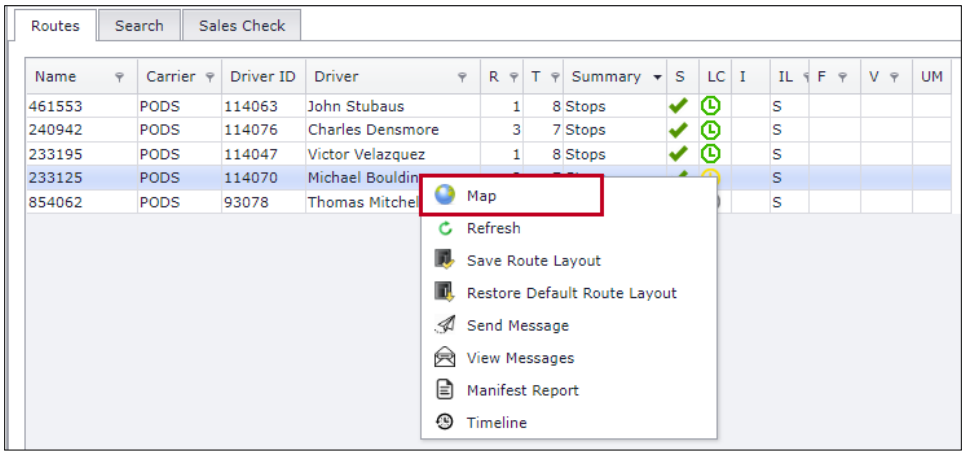


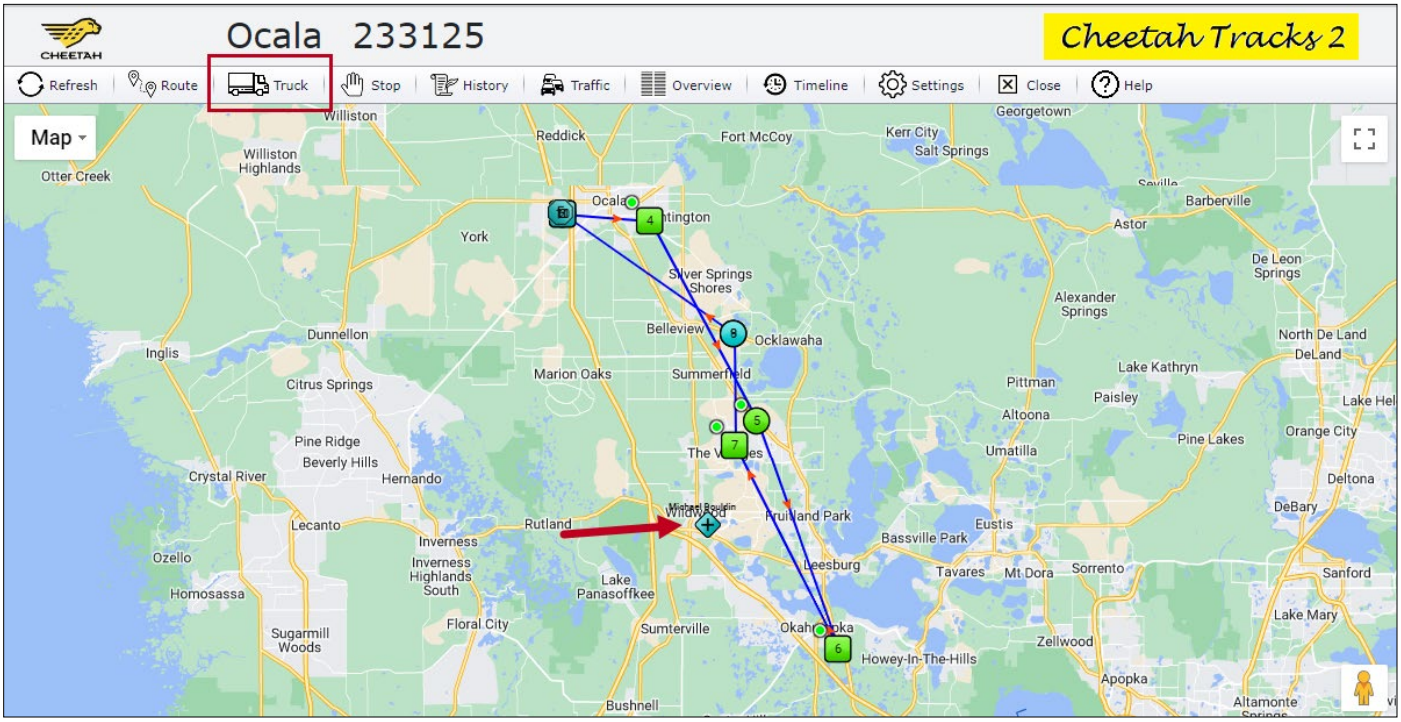
Important *Only Market Managers should SEND messages to drivers through the Cheetah app. SSC associates should only be VIEWING messages.*

Find a Driver Location – To view a map of a driver's route and current location

1. **Right click** on the **Driver Name** and **select Map** from the menu to open the route map in a separate window
2. **Click** the **Truck button** in the top menu of the map to zoom into the truck's current location

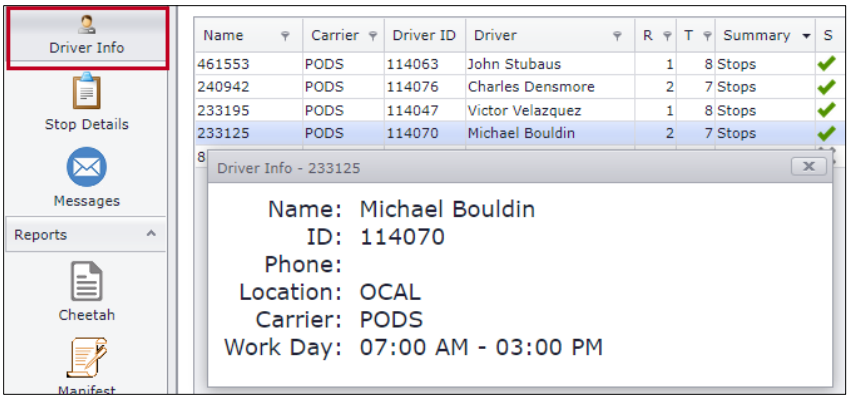
Tip: The driver's location is displayed with a diamond.



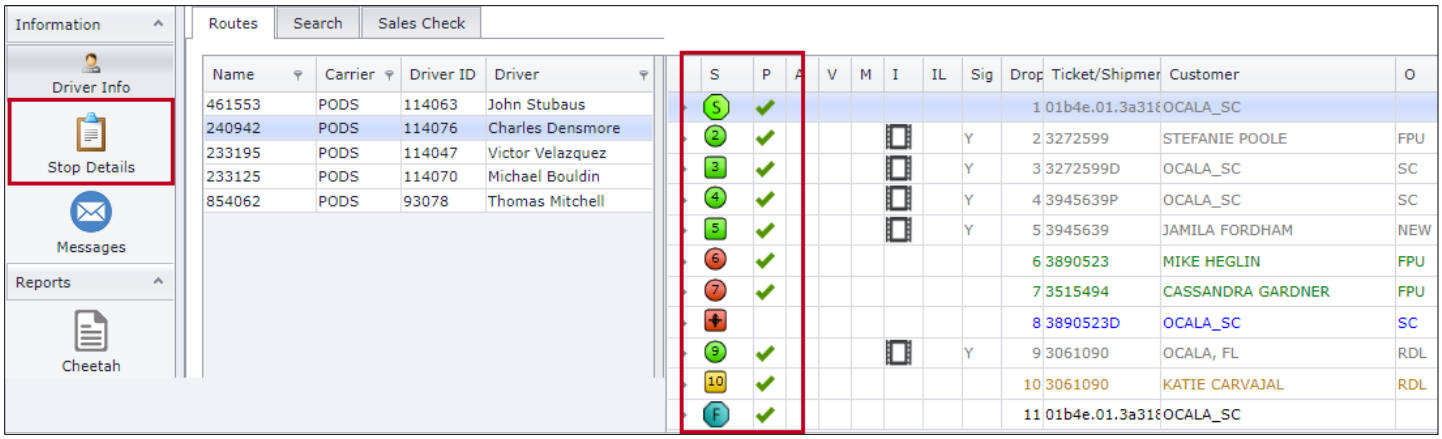


Driver Info – View basic overview information about a selected driver

1. **Click** the **Driver Info icon** in the left menu to display a pop-up with the driver name, ID, phone # (if listed in the system), storage center location, and normal work hours



Stops/Jobs Section



The right side of the **Routes tab** displays a list of stops for a highlighted driver in the route list

Job Status – The symbols in the S (Stop Status) and P (Projected Status) columns of the Stops section provide a quick overview of the job status

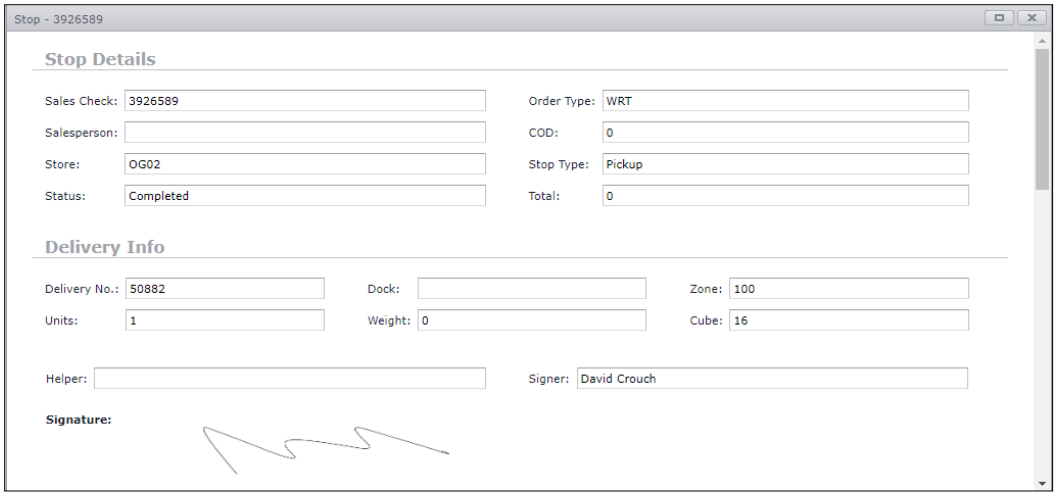
- **Circle:** Pickup
- **Square:** Delivery
- **Octagon S:** Start of Route
- **Octagon F:** End of Route
- **Green:** Completed
- **Red:** Canceled
- **Yellow:** Driver Onsite
- **Blue check:** Early
- **Green check:** On time
- **Red check:** Late
- **Pink check:** ETA within 30 min of time window

Tips:

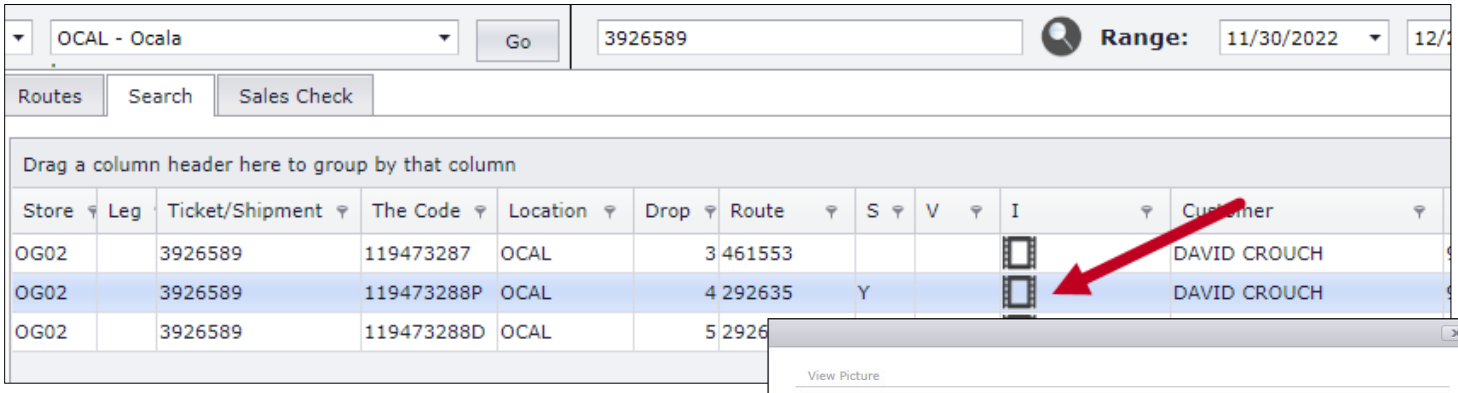
- *Driver's routes will always Start and Finish at the warehouse location.*
- *A stop is considered EARLY if the ETA or Arrival Time falls Before the Start of the Time Window.*
- *A stop is considered LATE if the ETA or Arrival Time falls After the End of the Time Window.*
- *A stop will be flagged as having an Exception if the driver selected a Non-Okay status.*

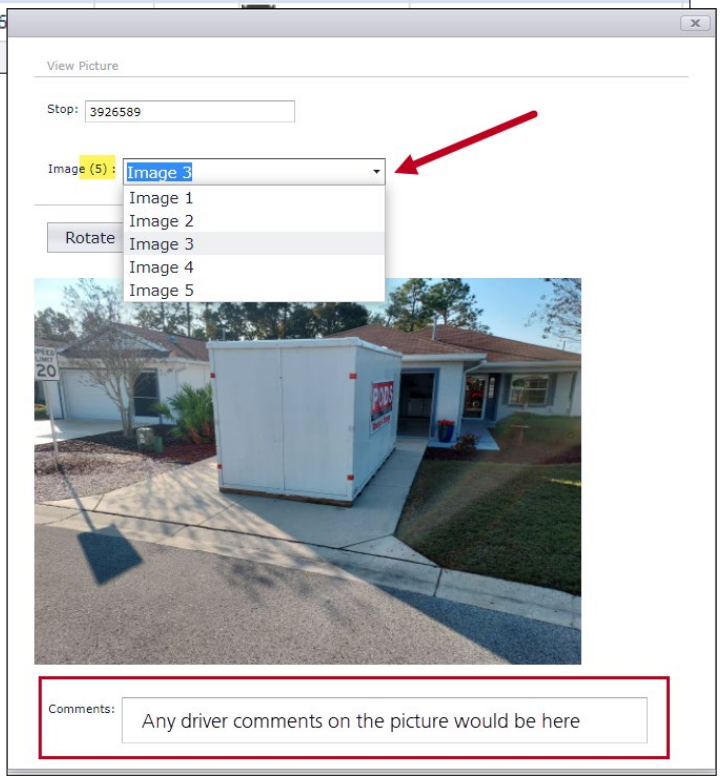
Stop Details – Details about a highlighted stop can be viewed from **search results** or from the **Routes screen**

1. **Click** the **Stop Details icon** to view the information for the highlighted line including
   a. **Order Type:** NEW, FPU, WRT, SC etc.
   b. **Stop Type:** Pickup or Delivery
   c. **Container Length:** Located in Cube under Delivery Info
   d. **Customer Signature:** Picture of signature
   e. **Driver Comments:** In the Handling textbox under Comments
   f. **Customer Info:** Address, Phone Number, Time Window, ETA, Cross Street



Images – If the driver took pictures as part of the stop, the film icon will be present on the stop in the list



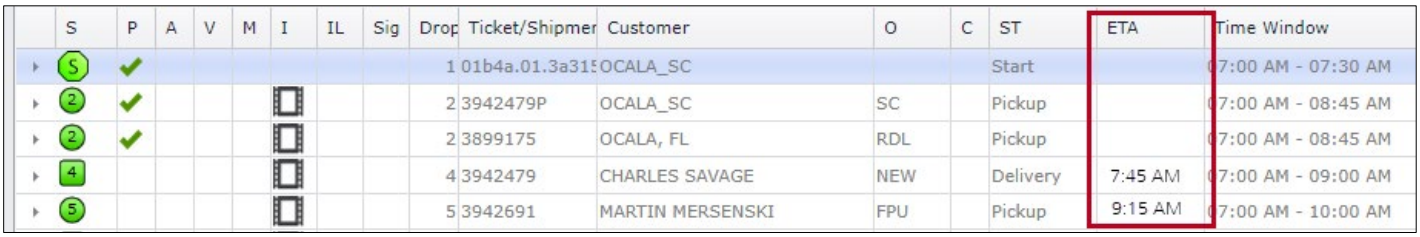


1. **Click** the **film icon** to open the **View Picture** pop-up window
2. **Select** the **Image** to preview from the **dropdown list**

   Tip: If multiple pictures are attached to the stop, the number of images will be indicated next to the image dropdown box
3. **View** driver comments attached to pictures in the **Comments box** at the bottom of the **View Picture pop-up**

ETAs – The estimated time of arrival is displayed in the ETA column

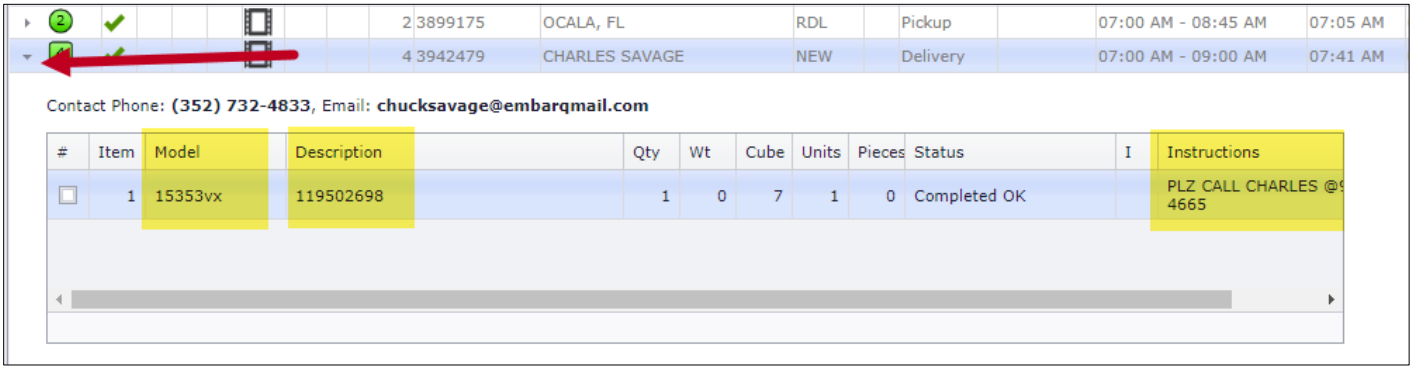
Important *Do NOT give the exact ETA to the customer. Let the customer know to expect the driver within 1 hour of the specified ETA.*



Container Number, Move Number, and Special Instructions – To quickly find this key information

1. **Double click** the selected **stop** from the list
   Or **click** the **chevron** next to the Stop Status (P) to display a quick view of
   a. **Model:** Container Number
   b. **Description:** Move Number
   c. **Instructions:** Special instructions from PODS OE Segment Information

*Tip: Customize the column labels by right clicking on the header and following the **Change Column Headers** instructions.*



OE Segment Information – Access segment information from Order Entry in Cheetah Service Desk

1. **Right click** anywhere on the selected **stop** line to open the pop-up menu
2. **Select View Additional Info** to open the **Extra Data** screen to view information on
   a. Container Placement
   b. Driveway Location
   c. Driveway Shape
   d. Driveway Side Placement
   e. Door Direction
   f. Placement Distance
   g. Directions
   h. Special Instructions
   i. Move Number
   j. Blankets
   k. Locks

