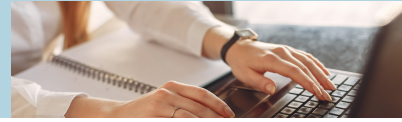


Navigating Contact Records



Search:

- Search box on Home page
- Navigate to More Menu -> Contacts -> Select Active Riders or Active Drivers from List View -> Type name in Search box

Contact record has two tabs: Detail and Related Records

- **Detail tab** – same page layout for all contacts
- **Related Records tab:**
 - Rides – All rides for the selected rider including canceled and posted
 - Recurring Rides – All recurring rides for selected rider
 - Availabilities – Selected driver's availability records by week
 - Opportunities -
 - Organization Affiliations – Site Affiliation and Bill To's
 - Routes – Selected driver's routes
 - Vehicles – Selected driver's vehicle(s)
 - ITN Locations – Location(s) associated with selected contact

Quick action buttons -- 3 displayed across the top, click down arrow to see all

Displayed:

- Update Availability – update driver availability for any day
- Manifest: Email Tomorrow
- Manifest: Email/Edit Tomorrow

Drop-down:

- Manifest: Email Today
- Manifest: Email/Edit Today
- Manifest Send 2 days out
- Manifest Send 3 days out
- Driver Availability – update driver availability for multiple days for current and next week
- New Cash or CC Payment
- New Account Adjustment – adjustments to accounts – credit, debit, admin charge, etc.
- Transfer Credit Flow – move credits from on account to another including donating credits to site because account is closing
- New Recurring Donation
- New Car Trade
- New Car Donation
- New Bill to Affiliation
- Edit
- New Site Affiliation
- Mass Mailer