3/3/2023

# Hitch - Task Management Process Guide

Version 1.0

## TRAINING & DEVELOPMENT TEAM
RUNBUGGY, INC.

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# Welcome to Task Management!

Task Management in the Hitch platform was created to help Administrators stay organized and efficient when assisting Hitch orders from start to finish. It allows you to see the progress of any order in real time and generates "tasks" to help manage your actions.

The objective of this guide is to:
- Provide solutions to Hitch order challenges
- Assist you to work closely with Transporters to support, and implement orders from start to finish
- Champion the Task Management way of working

# Task Management Process Guide Overview

This guide was made to serve as a reference and resource tool in answering questions and demonstrating practical steps when implementing Task Management. In general, the purpose of the guide is to provide a broad-based source of information of Task Management concepts, elements for day-to-day practice, and a place for you to take lots of good notes!

We encourage you to retain the guide and make use of its valuable information!

# Types of Tasks

There are three types of tasks:

1. **Auto generated:** Created by the system and based on a timer.
2. **Manually generated:** Created by a Hitch Admin within the order.
3. **Transporter generated:** Created by the Transporter, typically an order update.

Tasks can be seen in multiple different tables and views. It's important to view tasks in the correct areas and understand the type of task to determine the action(s) that need to be made.

Use the following views, shown below, to navigate and work tasks:

- **All Tasks (Dashboard View)**
- **My Tasks (Dashboard View)**
- **ALL TASKS (Task Logs View)**
- **FOCUSED VIEW (Task Logs View)**
- **ORDER CHANGES (Task Logs View)**

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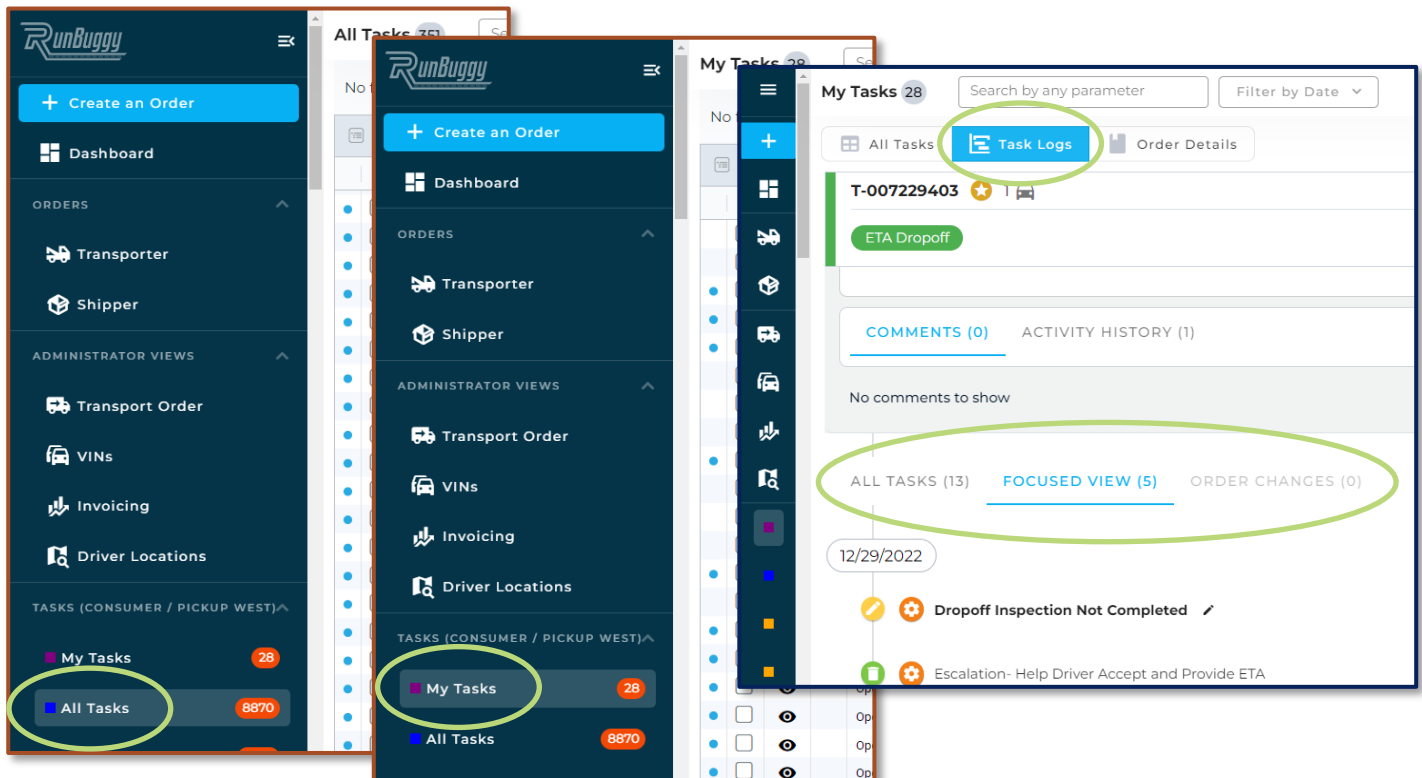
# TASK MANAGEMENT ORDER FLOW

*The following pages contain the Task Management order flow of when an order is initiated in the Hitch platform.*

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# Initial Tasks

## Communication Follow-up - Task

This guide will help you with the Task Management flow in the Hitch platform. This flow contains the initial **Communication Follow-up** task. This task appears automatically when the order is created. This initial task is primarily for documenting communications with Customers.

### Working the "Communication Follow-up" Task

1. Navigate to **All Tasks** and assign the **Communication Follow-up** task.
2. After assigning the task in **All Tasks**, navigate to **My Tasks.**
3. The **Communication Follow-up** task will appear to be used as needed.

> **NOTE:** Once assigned, this task will **NOT** transfer assignee to any tasks created after this one.

> **NOTE:** It is best practice to work out of the **My Tasks** view when working tasks on the Hitch platform.

> **WARNING:** If accidently closed or completed, a task **CANNOT** be reopened at this time. Be sure you only close the task when appropriate.
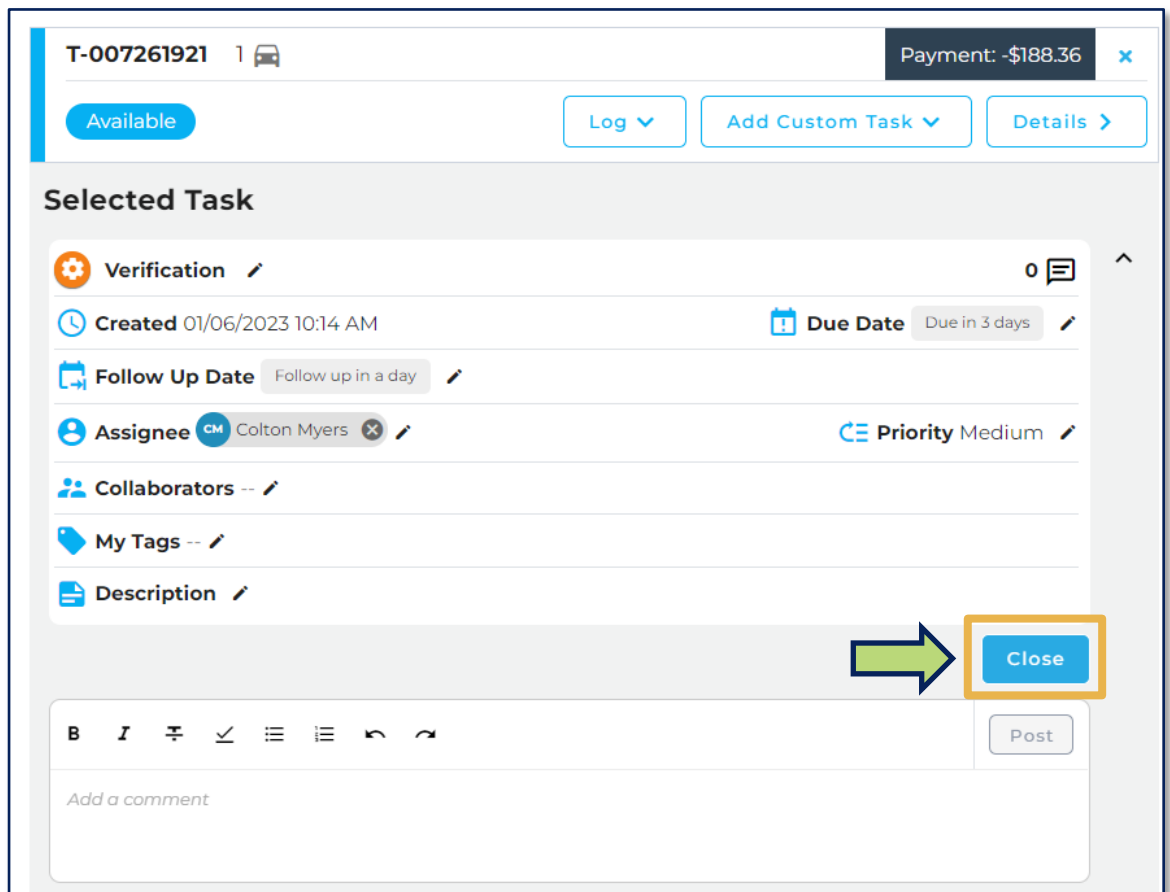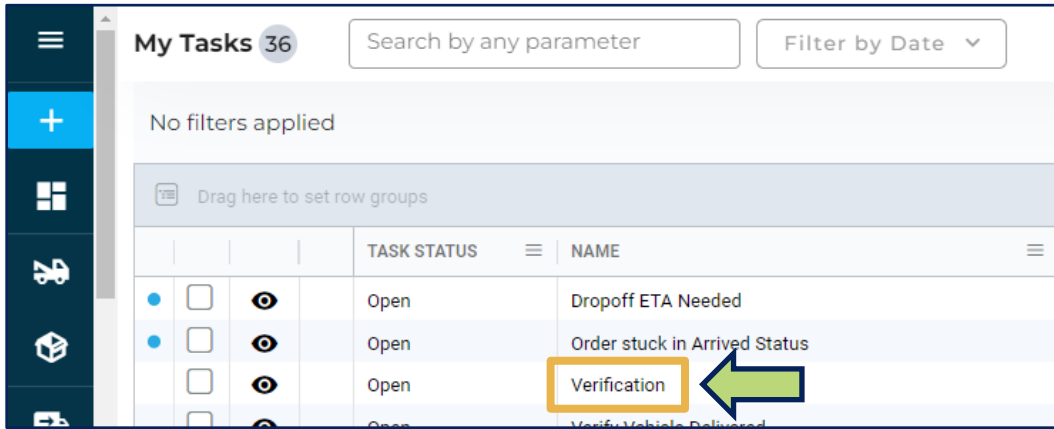
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# Verification (REPO Only) - Task

The **Verification** task is an auto generated task that appears on Repo orders once they are created.

## Working the "Verification" Task

1. Navigate to the **Verification** task.
2. Verify that the vehicle in the order is ready to be picked up.
3. Once verified, **Close** the task.

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# *Available Status Tasks*

## Source // PU to DO - Task

After the Communication Follow-up task is taken care of, the order will be in the **Available** status. A **Source** task will be auto generated by the Hitch system based on set timers. This task can also be manually generated right after the order is created. See below on next action steps in this task status.

### Working the "Source // PU to DO" Task

1. Navigate to the **Source // PU to DO** task.
2. The **Source // PU to DO** task is to be manually assigned. Once assigned, follow-up tasks will auto assign to the same assignee. If necessary, manually create one of the following subtasks:
   - **Escalation- Sourcing Task**
   - **Post to CD**
     - Check with your Supervisor or Manager on who to assign the subtask to.
     - Post a comment once the order has been posted to CD.
   - **BluePOD Signup Assist**
     - Assign the subtask to the appropriate member of the Blue POD.

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# Post to CD - Subtask

**Post to CD** (Central Dispatch) is an optional subtask. Most accounts will use this task and it **must be manually assigned**. Check with your Supervisor or Manager on who to assign this task to.

## Working the "Post to CD" Subtask

1. Navigate to the **Source//PU to DO** task.
2. Select the **Post to CD** subtask from the dropdown.
3. Post a comment in the subtask once posting to CD has been completed.
4. Include the CD order ID# in the comment.
5. Mark the subtask as **Complete.**

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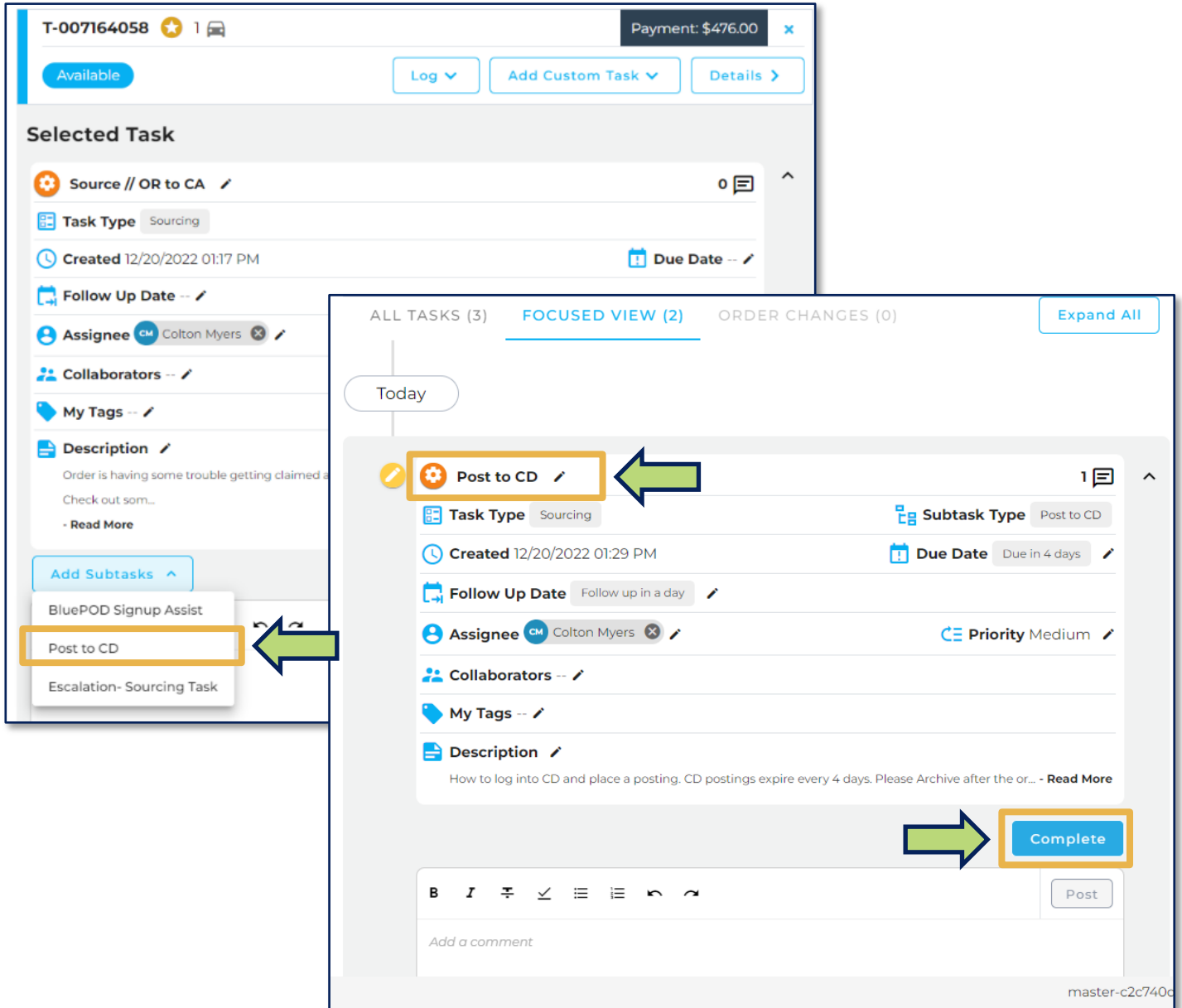
# BluePOD Signup Assist - Subtask

**BluePOD Signup Assist** is an optional subtask. This task will be used when a Transporter calls in for an available order and they are not signed up with Hitch. Once the task is chosen, the BluePOD team will be assigned the task to complete a registration with the Transporter and collect needed paperwork.

## Working the "BluePOD Signup Assist" Subtask

1. Navigate to the **Source // PU to DO** task.
2. Select **BluePOD Signup Assist** from the dropdown.
3. Reassign the subtask to the appropriate Blue POD team member.
4. Once finished, **Complete** the subtask.

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# Escalation- Sourcing Task - Subtask

The **Escalation- Sourcing Task** is an optional subtask that is used when an order is aged and needs additional sourcing input. **If needed,** contact the Sourcing Team with the TO number for assistance.

**Working the "Escalation- Sourcing Task" Subtask**

1. Navigate to the **Source // PU to DO** task.
2. Select **Escalation- Sourcing Task.**
3. Complete the appropriate next sourcing steps.
4. Once finished, **Complete** the subtask.

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# *Claimed Status Tasks*

Once the order has been **claimed** it is important to get a Driver assigned and to accept the order. This might require an action of getting in contact with a Transporter. An escalation task is an option for assistance as a manual subtask.

- **Help Get Driver Assigned**
  - Escalation- Driver Assigned

Once the order is **assigned** and **accepted**, the Transporter will need to provide an Estimated Time of Arrival (ETA) for pickup of the vehicle.

- **Help Driver Accept and Provide ETA**
  - Escalation- Help Driver Accept and Provide ETA
- **Review Missed Pickup ETA**
  - Escalation- Pickup ETA Missed
- **Pickup ETA was Updated**
- **Help Get Appointment (REPO Only)**
- **Arrived at the Pickup Location**

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# Help Get Driver Assigned - Task

The **Help Get Driver Assigned** task is an auto generated task when a Driver is not assigned in a timely manner based on SLAs.

### Working the "Help Get Driver Assigned" Task

1. Navigate to the **Help Get Driver Assigned** task.
2. Contact the Transporter to get a Driver assigned to the order and input into the system.

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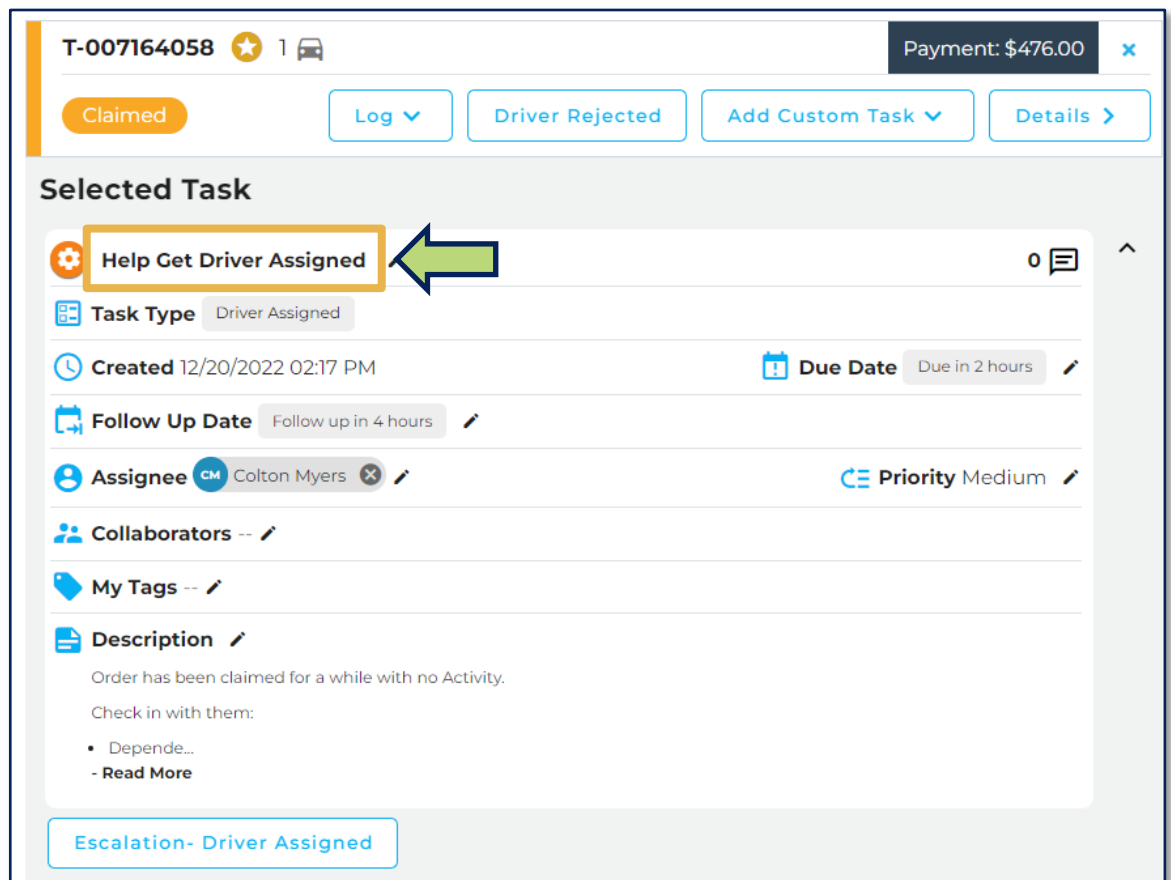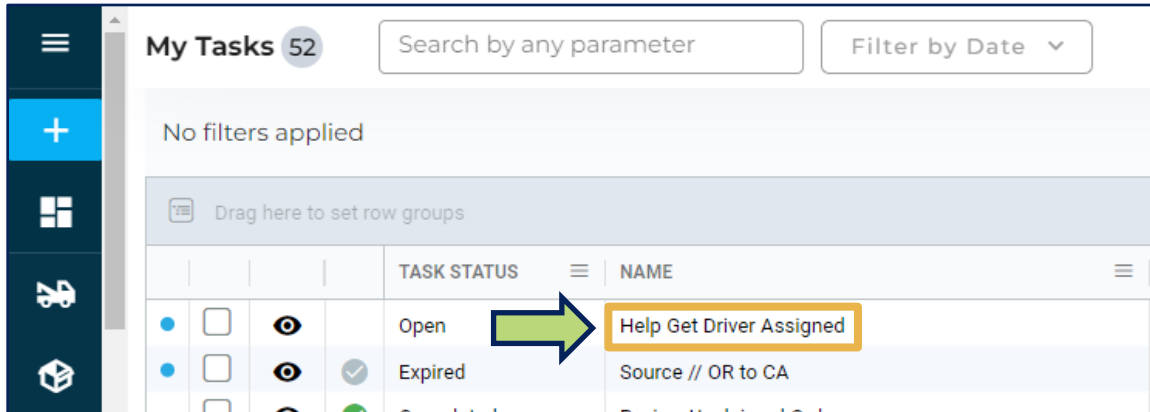
# Escalation- Driver Assigned - Subtask

The **Escalation- Driver Assigned** is a manual subtask option for assistance in getting a Transporter to assign a Driver. When selecting this subtask, the BluePOD will be notified to assist.

## Working the "Escalation- Driver Assigned" Subtask

1. Navigate to the **Help Get Driver Assigned** task.
2. Click the **Escalation- Driver Assigned** subtask button.
3. BluePOD to assist with contacting Transporter in getting a Driver assigned. Additionally, BluePOD will assist with ETA for pick-up and drop-off for any residential Customer vehicle.
4. Mark the subtask as **Complete**.
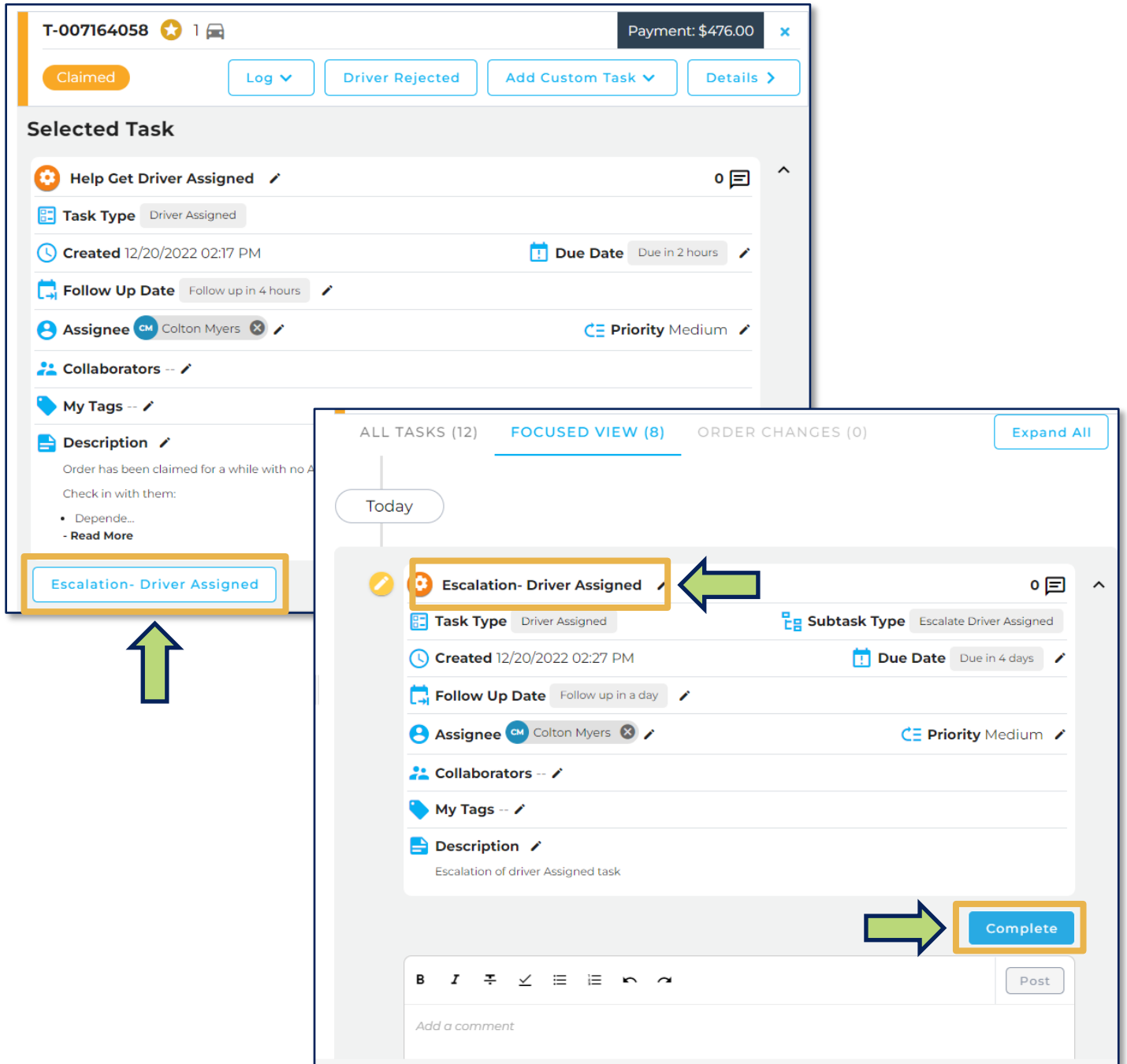
# Help Driver Accept and Provide ETA - Task

**Help Driver Accept and Provide ETA** is an auto generated task when a Driver has not supplied an ETA for pickup within the designated time.

### Working the "Help Driver Accept and Provide ETA" Task

1. Navigate to the **Help Driver Accept and Provide ETA** task.
2. Contact the Transporter to obtain ETA and input into the system for the specific order.

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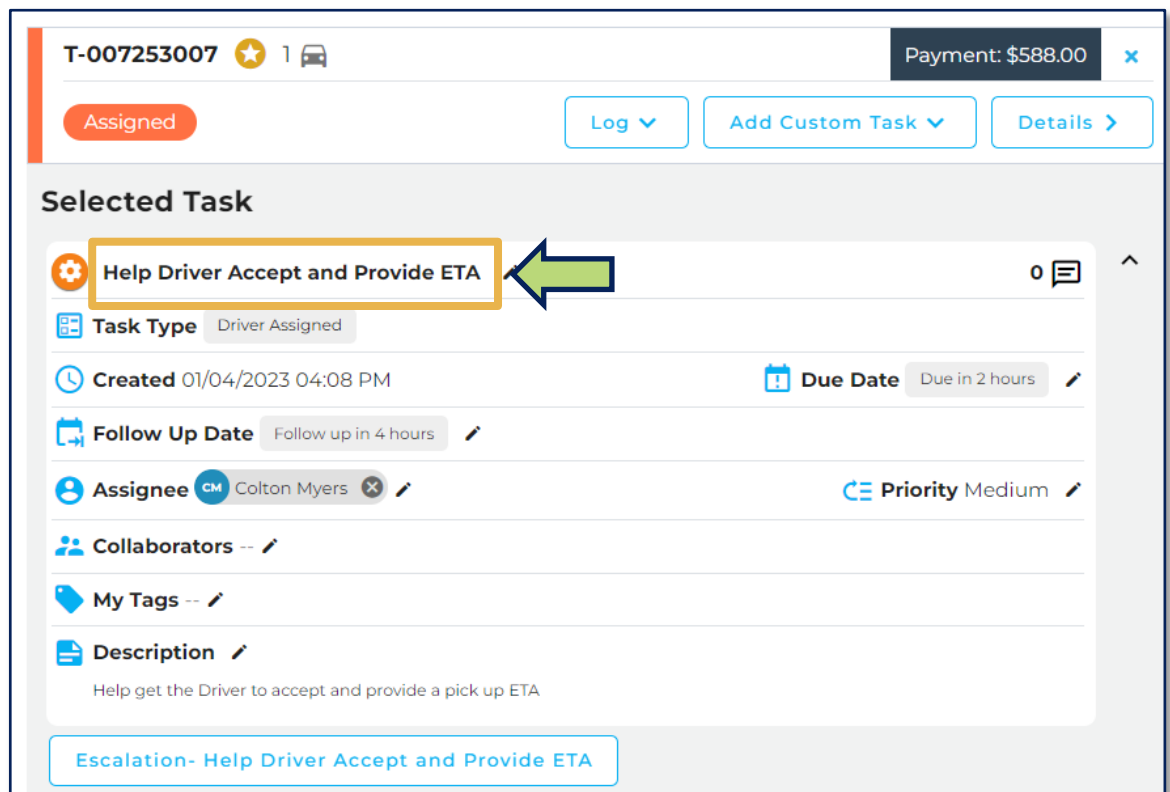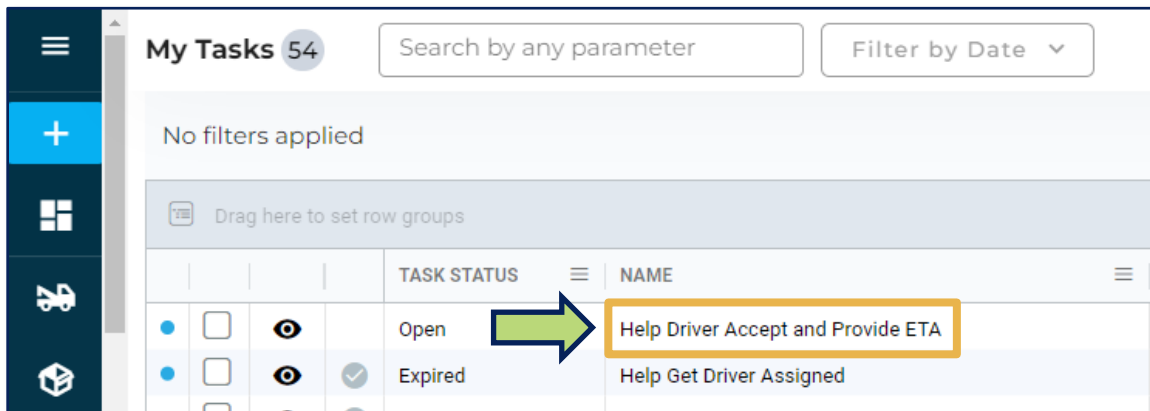
# Escalation- Help Driver Accept and Provide ETA - Subtask

**Escalation- Help Driver Accept and Provide ETA** is a manual subtask option for assistance in getting an ETA from the Transporter/Driver.

## Working the "Escalation- Help Driver Accept and Provide ETA" Subtask

1. Navigate to the **Help Driver Accept and Provide ETA** task.
2. Click the **Escalation- Help Driver Accept and Provide ETA** subtask button.
3. Contact the Transporter to obtain ETA and input into the system for the specific order.
4. Escalate to your Supervisor/Manager accordingly.
5. Mark the subtask as **Complete**.

# Help Get Appointment (REPO ONLY) - Task

The **Help Get Appointment** task is to be used by the REPO Team only to ensure that someone will be at the dropoff location during the provided the ETA window. This task is auto generated based on a timer after an order has been accepted by a Driver.

**Working the "Help Get Appointment" Task**

1. Navigate to the **Help Get Appointment** task.
2. Contact the dropoff contact to confirm someone will be there during the ETA window.
3. Input information into the system as needed.
4. Once confirmed, **Complete** the task.
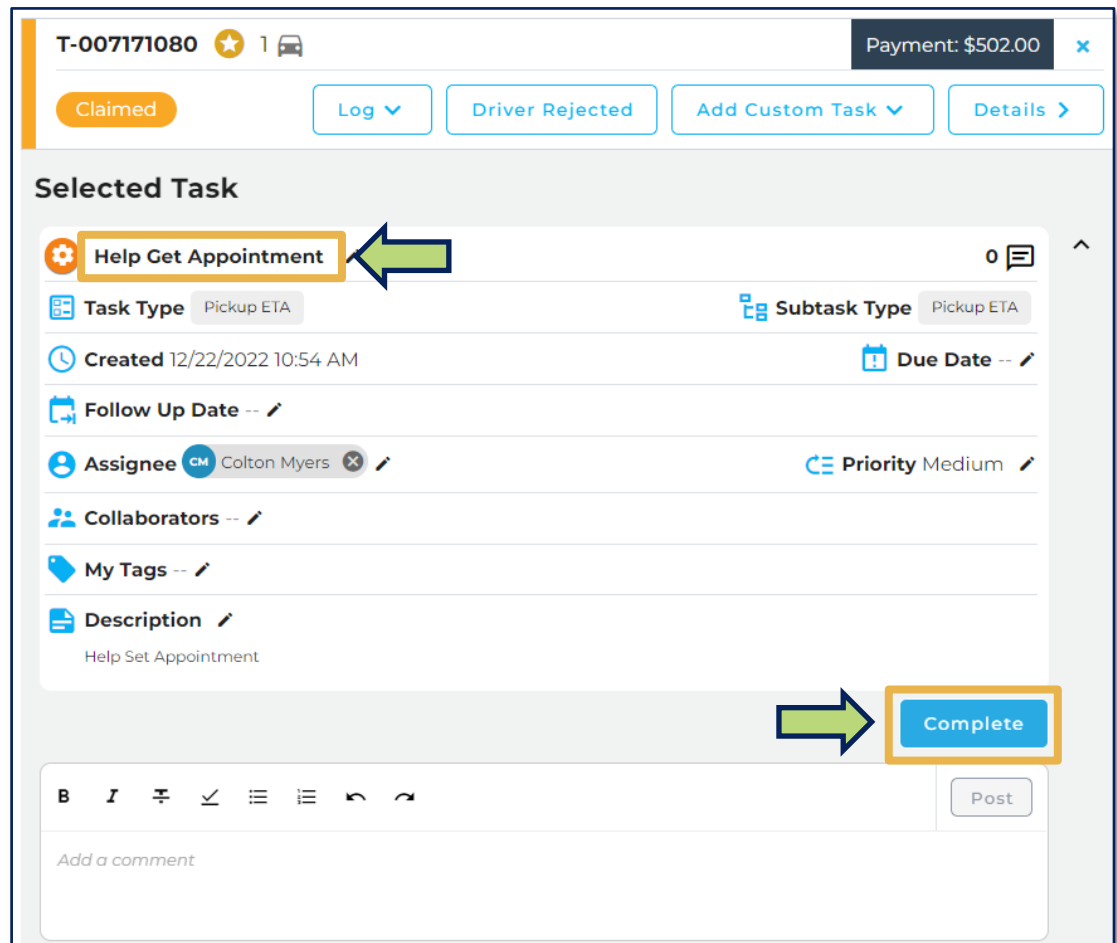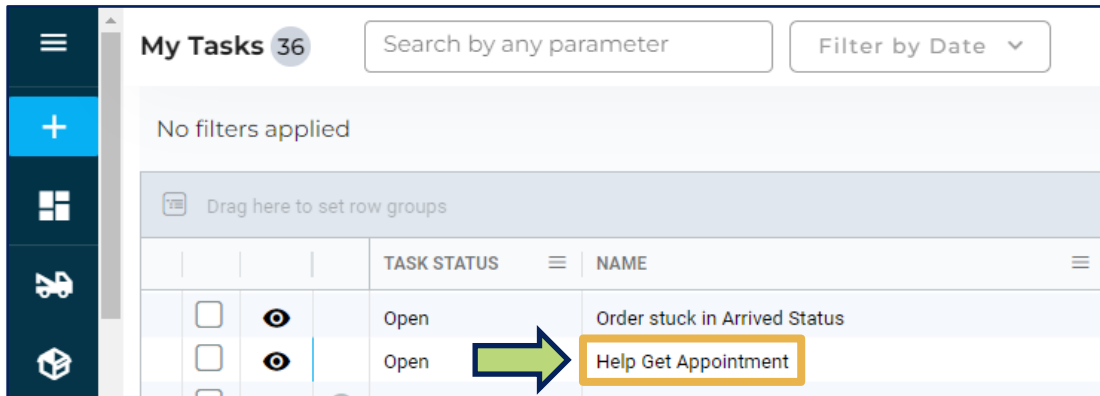
# Review Missed Pickup ETA - Task

**Review Missed Pickup ETA** is an auto generated timer based task. It is created if a Driver does not arrive within the provided ETA window.

## Working the "Review Missed Pickup ETA" Task

1. Navigate to the **Review Missed Pickup ETA** task.
2. Contact the Transporter/Driver to obtain information as to why scheduled ETA was missed and input into the system for the specific order.

# Escalation- Pickup ETA Missed - Subtask

**Escalation- Pickup ETA Missed** task should be created if assistance is needed in contacting the Transporter/Driver to find out why the vehicle was not picked up withing promised time frame.

## Escalation- Pickup ETA Missed Task

1. Navigate to the **Review Missed Pickup ETA** task.
2. Click the **Escalation- Pickup ETA Missed** subtask.
3. Contact the Transporter/Driver to obtain information as to why scheduled ETA was missed and input into the system for the specific order.
4. Escalate to your Supervisor/Manager accordingly.
5. Mark the subtask as **Complete**.

# Pickup ETA was Updated - Task

**Pickup ETA was Updated** task is a Transporter triggered task when they update the ETA, before or after missing ETA.

### Working the "Pickup ETA was Updated" Task
1. Navigate to the **Pickup ETA was Updated** task.
2. Contact the pickup contact parties to obtain information that requires communication and/or coordination for delivery.
3. Input information into the system for the specific order.
4. Mark the task as **Complete**.

# Arrived At The Pickup Location - Task

**Arrived At The Pickup Location** is a Transporter triggered task with **no action required**. It's simply an order update.

# In Transit Tasks

Once the order is **in transit**, the system will auto generate, and the Transporter will trigger tasks. This might require an action of getting in contact with a Transporter/Driver. An escalation task is an option for assistance as a manual subtask.
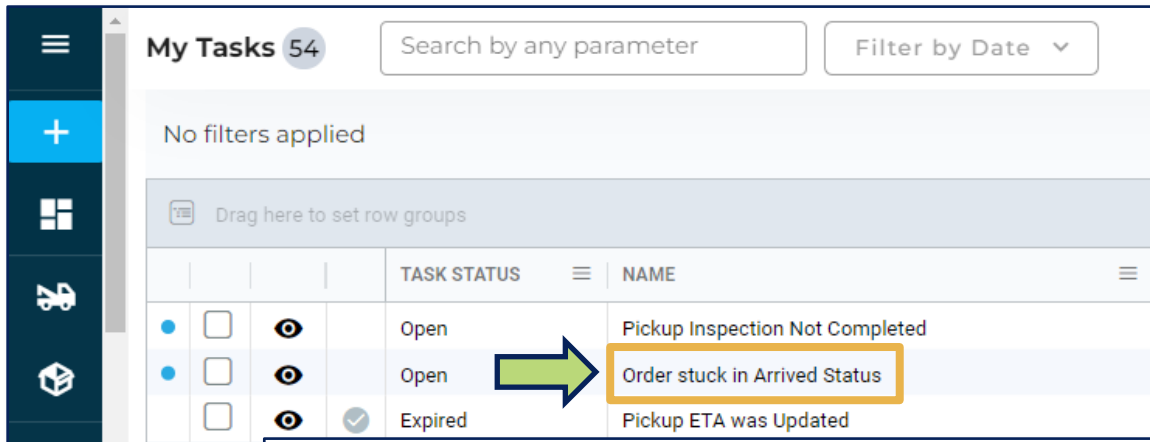
- **Order stuck in Arrived Status**
- **Start Pickup Inspection**
- **Pickup Inspection Not Completed**
- **Dropoff ETA Needed**
  - Escalation- Dropoff ETA Needed
- **Review Missed Dropoff ETA**
  - Escalation- Review Missed Dropoff ETA
- **Mark Arrived at Dropoff**
- **Start Dropoff Inspection**
- **Dropoff Inspection Not Completed**

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# Order stuck in Arrived Status - Task

**Order stuck in Arrived Status** is an auto generated task based on a timer. If the Driver arrives at the pickup location but does not start a vehicle inspection in the allotted time, this task will appear.
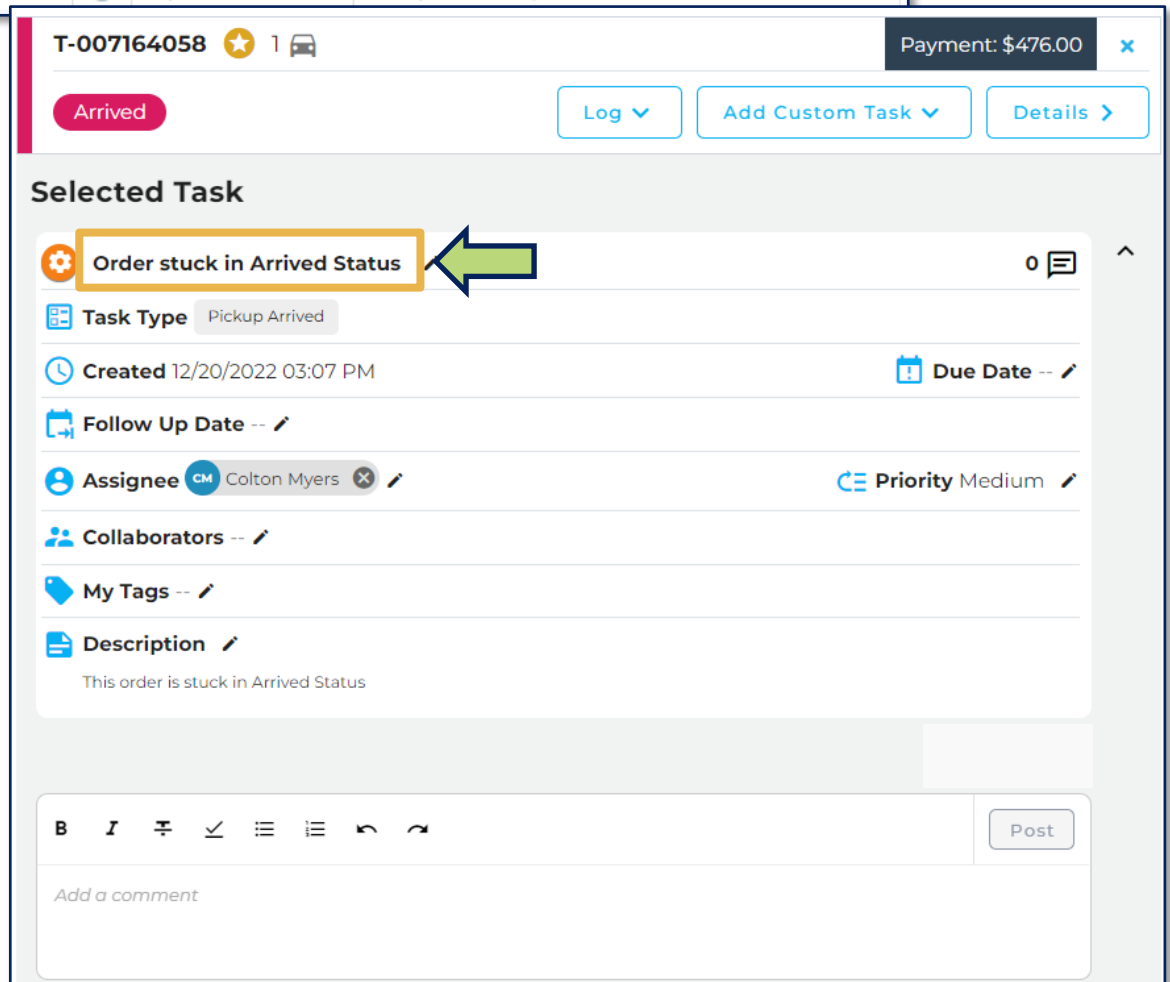
### Working the "Order stuck in Arrived Status" Task

1.  Navigate to the **Order stuck in Arrived Status** task.
2.  Contact the Transporter/Driver to obtain information if there is a Hitch app issue and if photos have been taken and uploaded to be able to progress the order.

# Start Pickup Inspection - Task

**Start Pickup Inspection** is a Transporter triggered task with **no action required**. It's simply an order update.

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# Pickup Inspection Not Completed - Task

**Pickup Inspection Not Completed** is an auto generated task based on a system timer. It is created if the Driver starts an inspection but does not complete it in the allotted time.

**Working the "Pickup Inspection Not Completed" Task**
1. Navigate to the **Pickup Inspection Not Completed** task.
2. Contact the Transporter/Driver to see if assistance is needed to complete the inspection.
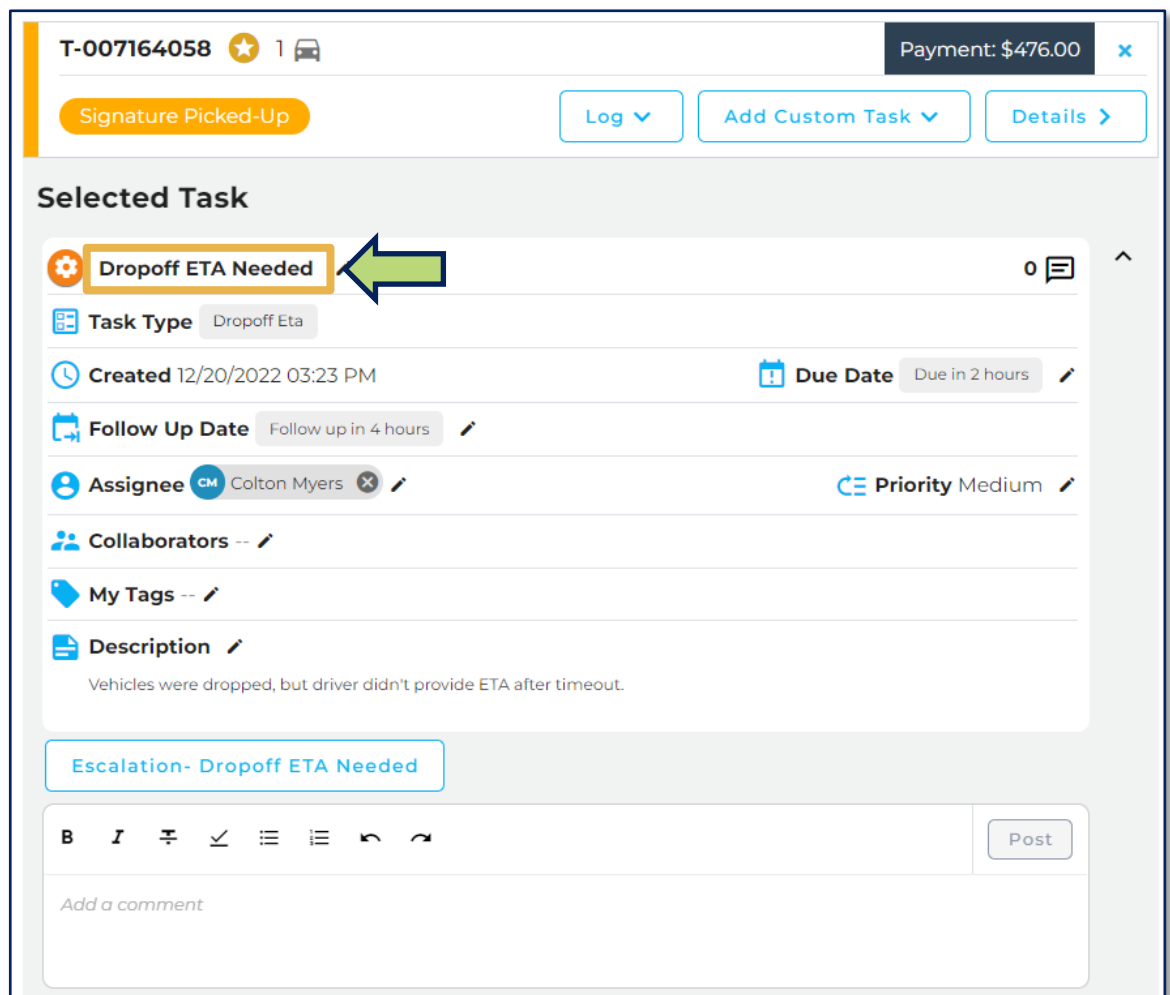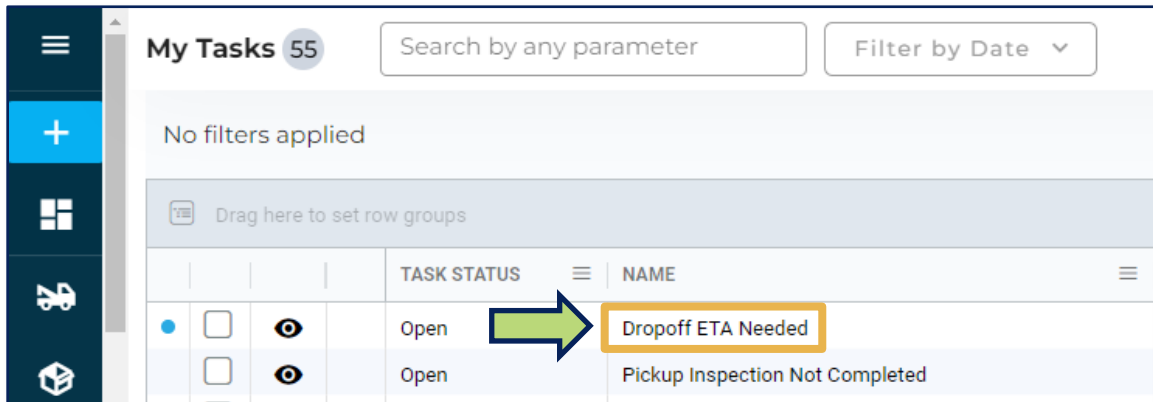
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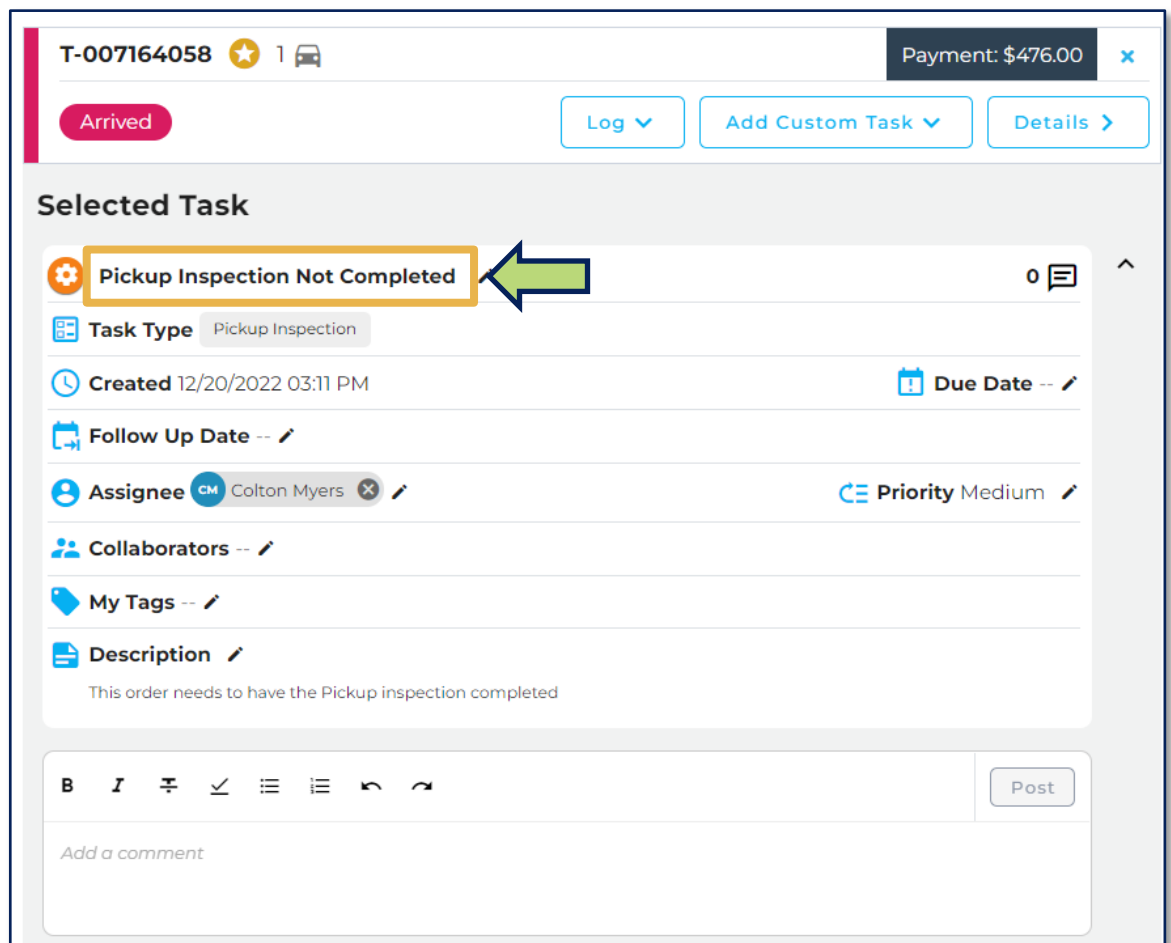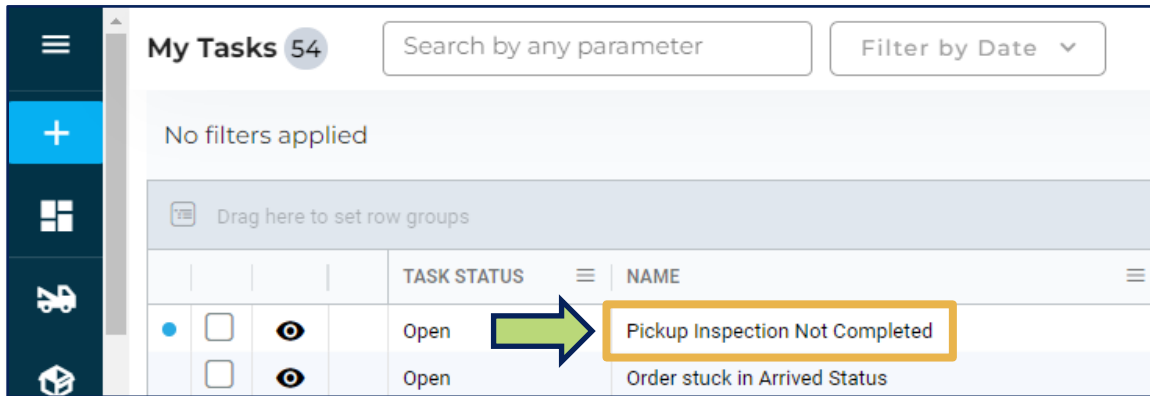
# Dropoff ETA Needed - Task

**Dropoff ETA Needed** is an auto generated task based on a timer. It is created if the Driver has completed a pickup inspection but then does not submit a dropoff ETA.

## Working the "Dropoff ETA Needed" Task

1. Navigate to the **Dropoff ETA Needed** task.
2. Contact the Transporter/Driver to have them update their dropoff ETA.

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# Escalation- Dropoff ETA Needed - Subtask

**Escalation- Dropoff ETA Needed** is an optional subtask that should be created if assistance is needed with contacting the Transporter/Driver for a dropoff ETA.

## Working the "Escalation- Dropoff ETA Needed" Subtask

1. Navigate to the **Dropoff ETA Needed** task.
2. Click the **Escalation- Dropoff ETA Needed** subtask.
3. Contact the Transporter/Driver to have them update their dropoff ETA.
4. Escalate to your Supervisor/Manager accordingly.
5. Mark the subtask as **Complete**.

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# Review Missed Dropoff ETA - Task

**Review Missed Dropoff ETA** is an auto generated task based on system timer. If the Driver does not arrive within the provided ETA window this task will trigger. Contact the Transporter/Driver and find out what happened then update the order accordingly.

### Working the "Review Missed Dropoff ETA" Task

1. Navigate to the **Review Missed Dropoff ETA** task.
2. Contact the Transporter/Driver to find out why dropoff ETA has been missed and have them update their dropoff ETA in the app.

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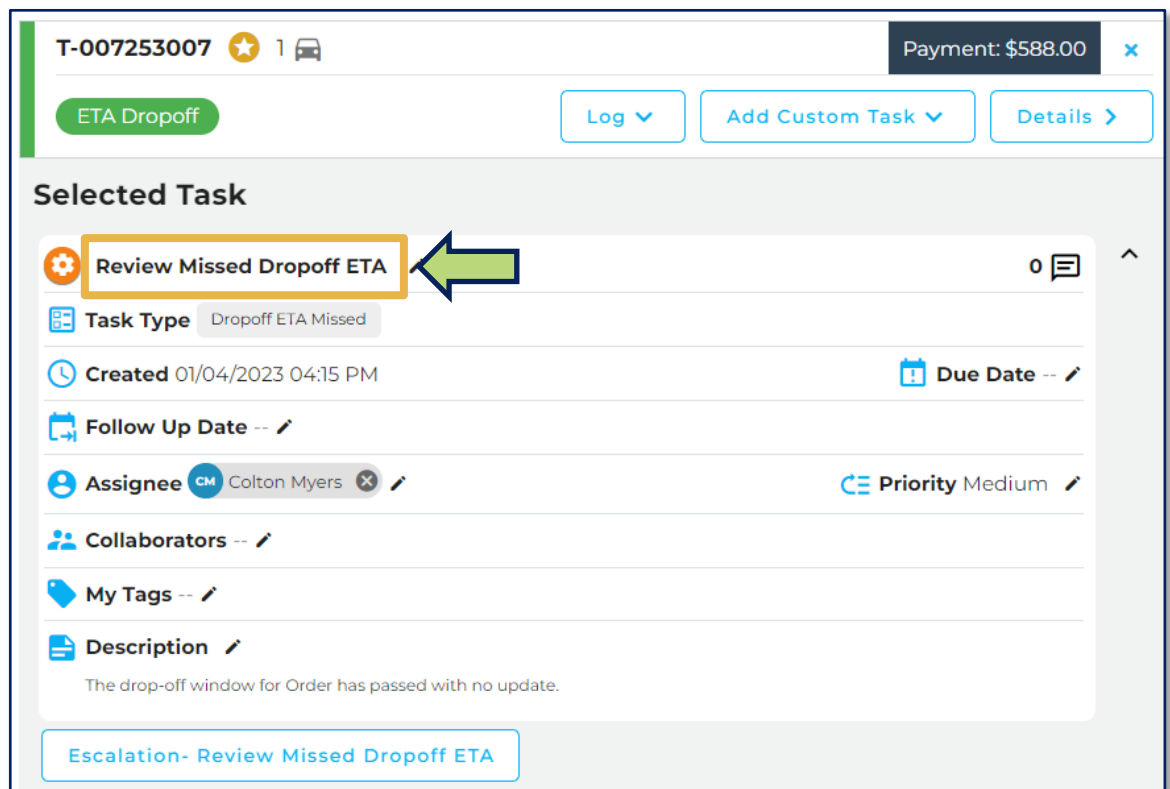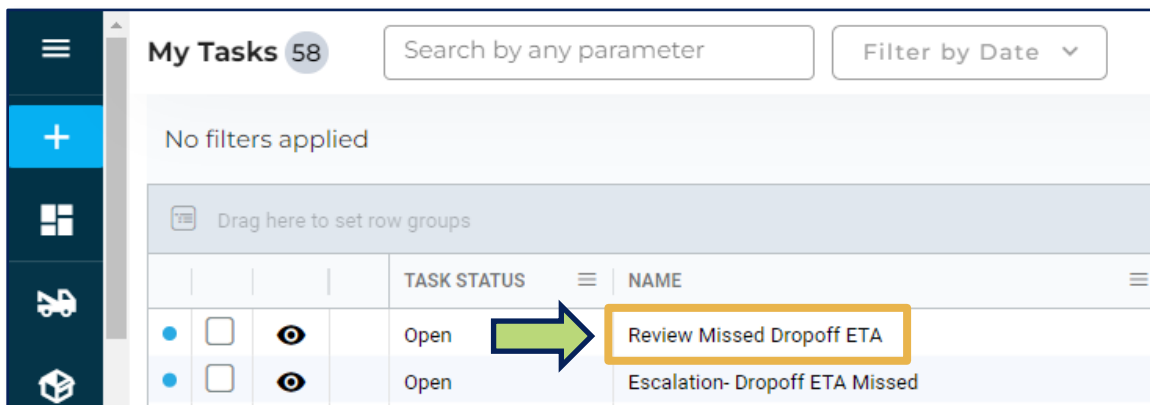
# Escalation- Review Missed Dropoff ETA - Subtask

**Escalation- Review Missed Dropoff ETA** is an auto generated task based on a system timer. If the Driver does not arrive within the provided ETA window this task will trigger. Contact the Transporter/Driver and find out what happened then update the order accordingly.

## Working the "Escalation- Review Missed Dropoff ETA" Subtask

1. Navigate to the **Review Missed Dropoff ETA** task.
2. Click the **Escalation- Review Missed Dropoff ETA** subtask button.
3. Contact the Transporter/Driver to find out why dropoff ETA has been missed and have them update their dropoff ETA in the app.
4. Escalate to your Supervisor/Manager accordingly.
5. Mark the subtask as **Complete**.

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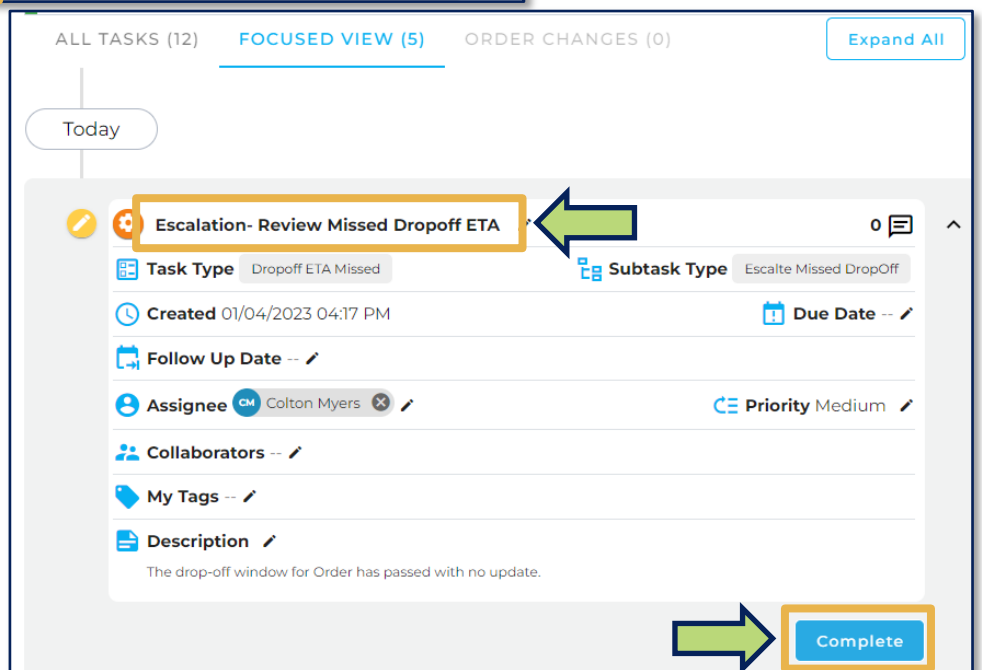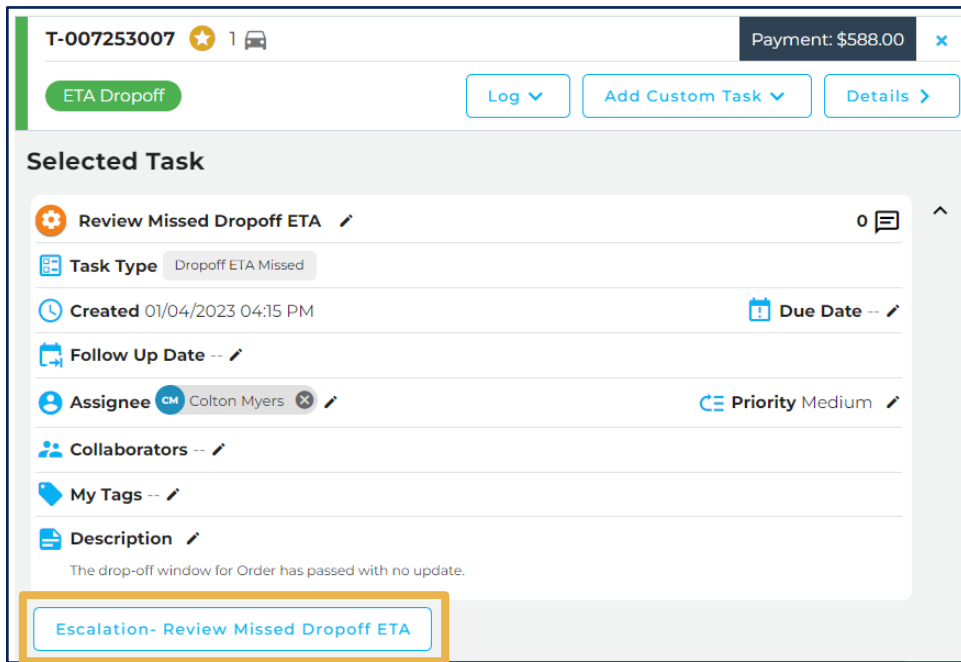
# Dropoff ETA was Updated - Task

**Dropoff ETA was Updated** is a Transporter triggered task that appears when they update the ETA, before or after missing ETA.

## Working the "Dropoff ETA was Updated" Task

1. Navigate to the **Dropoff ETA was Updated** task.
2. Reach out to the pickup contact(s) to obtain information that requires communication and/or coordination for delivery.
3. Input information into the system for the specific order.
4. Mark the task as **Complete**.

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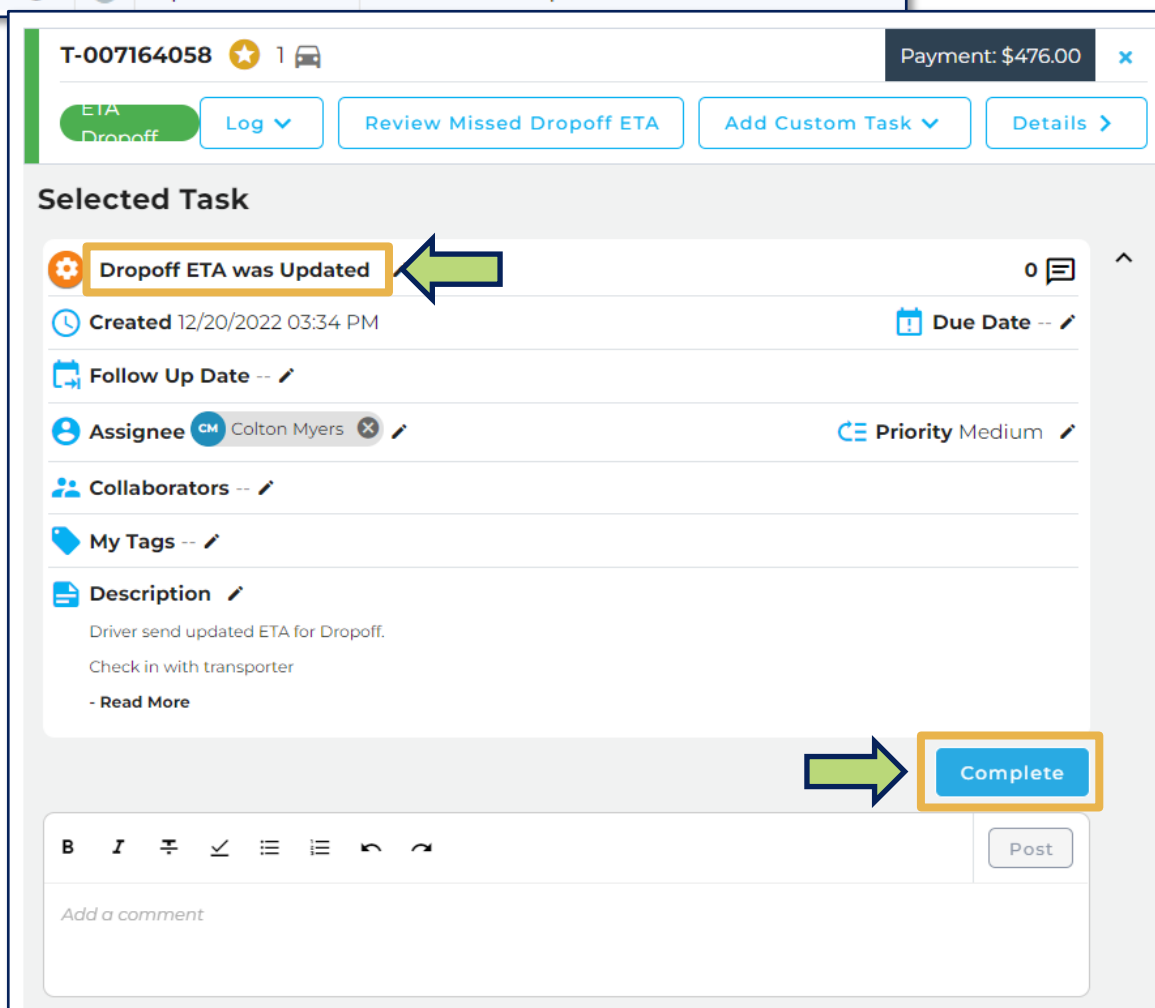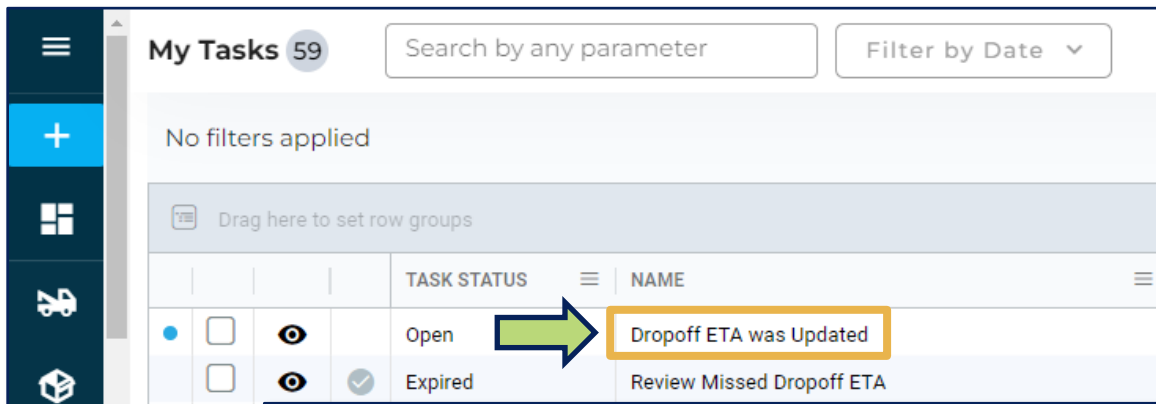
# Mark Arrived at Dropoff - Task

**Mark Arrived at Dropoff** is a Transporter triggered task with **no action required**. It's simply an order update.

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# Start Dropoff Inspection - Task

**Start Dropoff Inspection** is a Transporter triggered task with <u>**no action required**</u>. It's simply an order update.

# Dropoff Inspection Not Completed - Task

**Dropoff Inspection Not Completed** is an auto generated triggered task based on a system timer. It is created if the Driver starts the dropoff inspection but does not complete it in the allotted time.

## Working the "Dropoff Inspection Not Completed" Task
1. Navigate to the **Dropoff Inspection Not Completed** task.
2. Contact the Transporter/Driver to see if assistance is needed to complete the inspection.
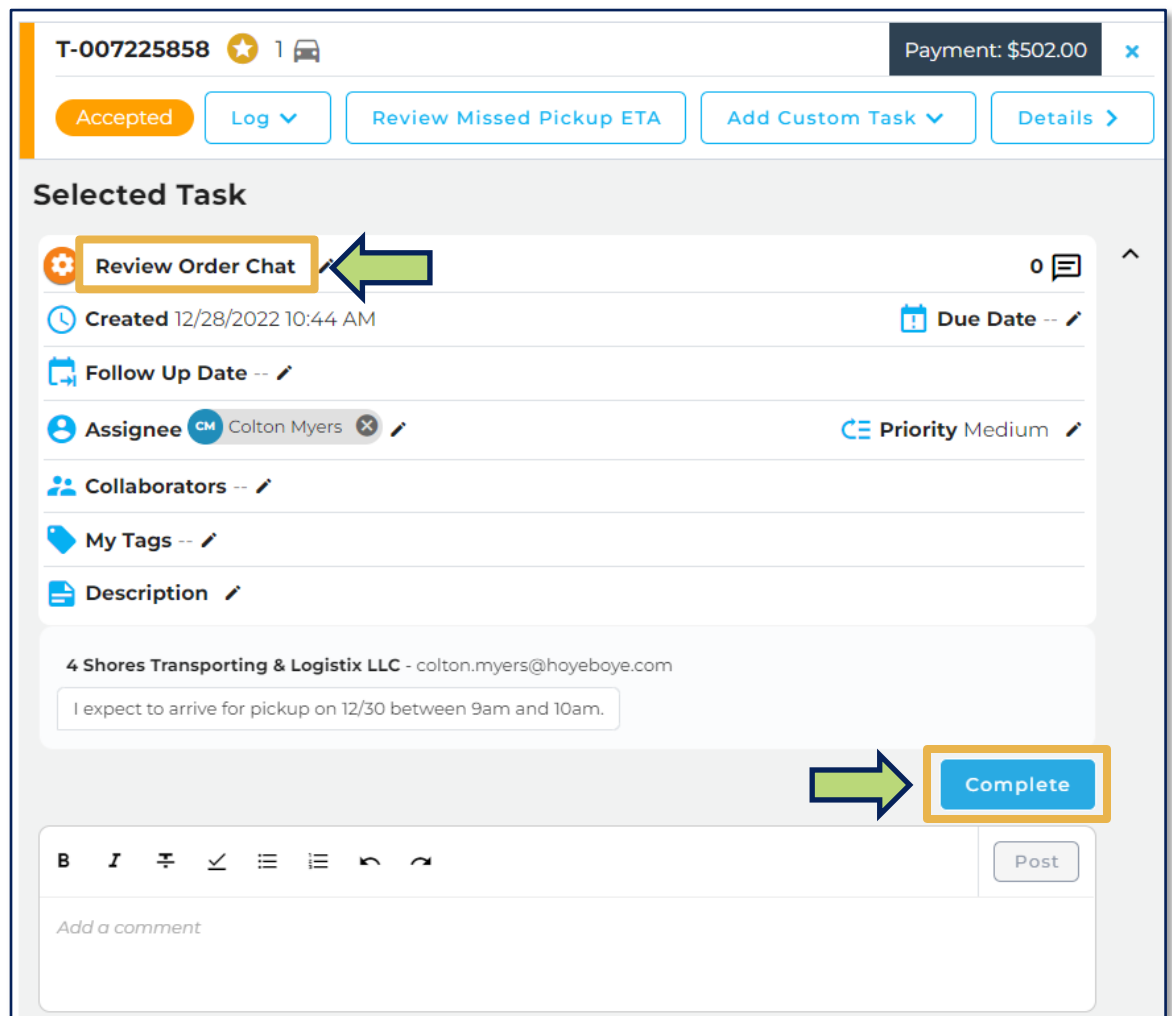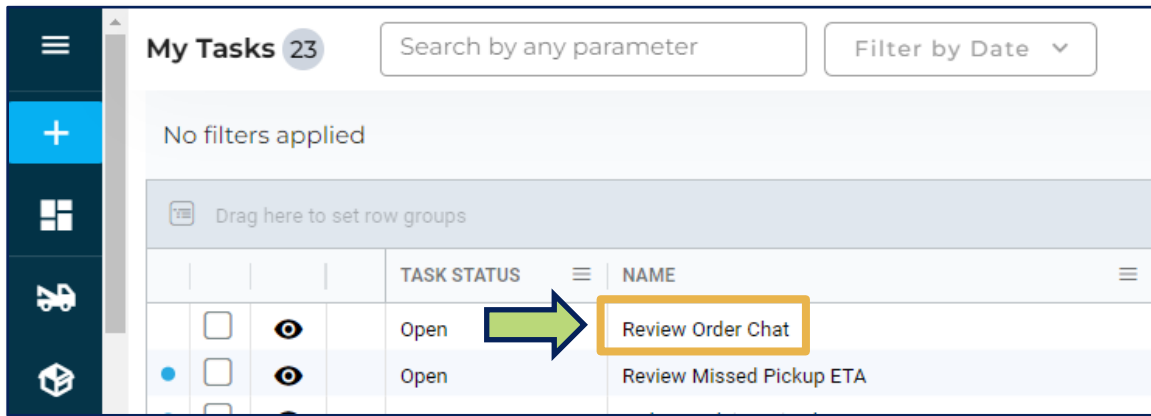
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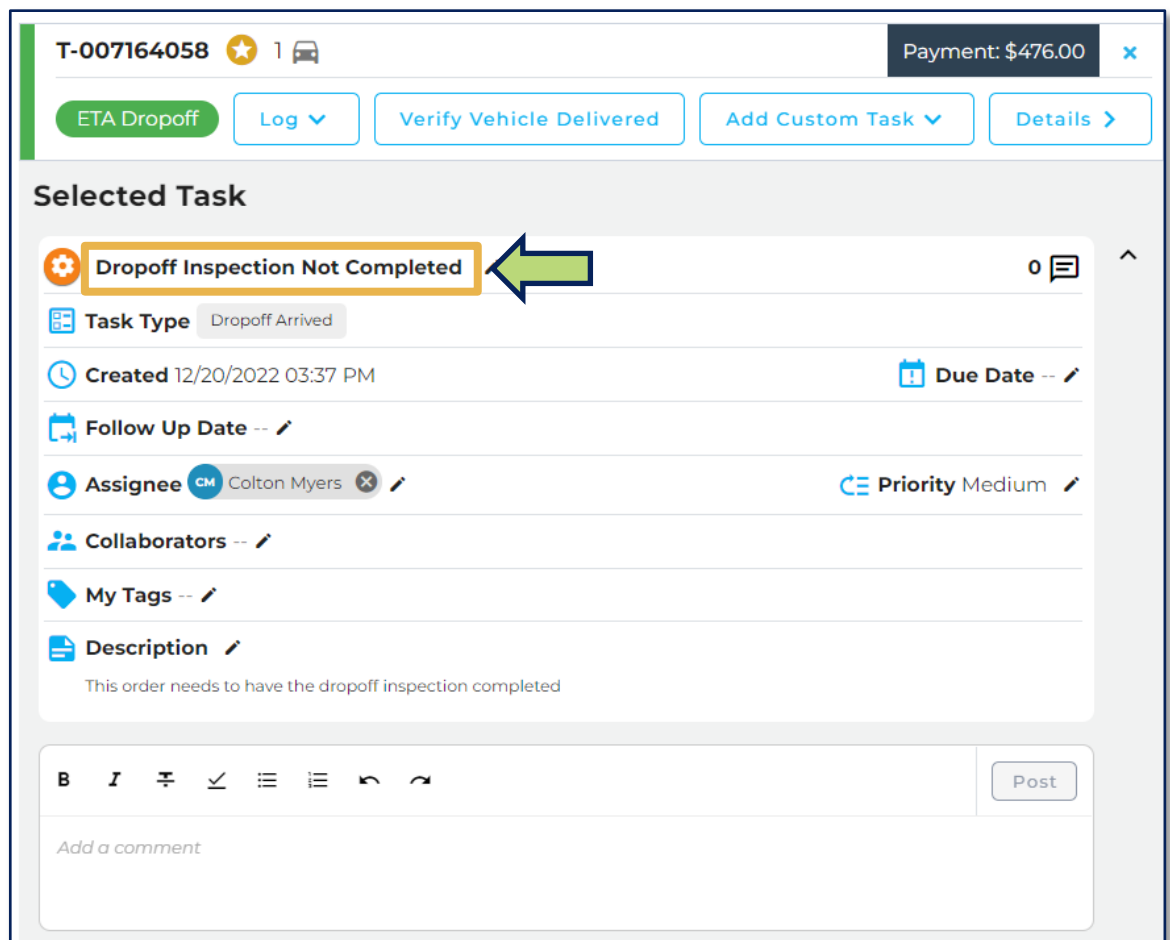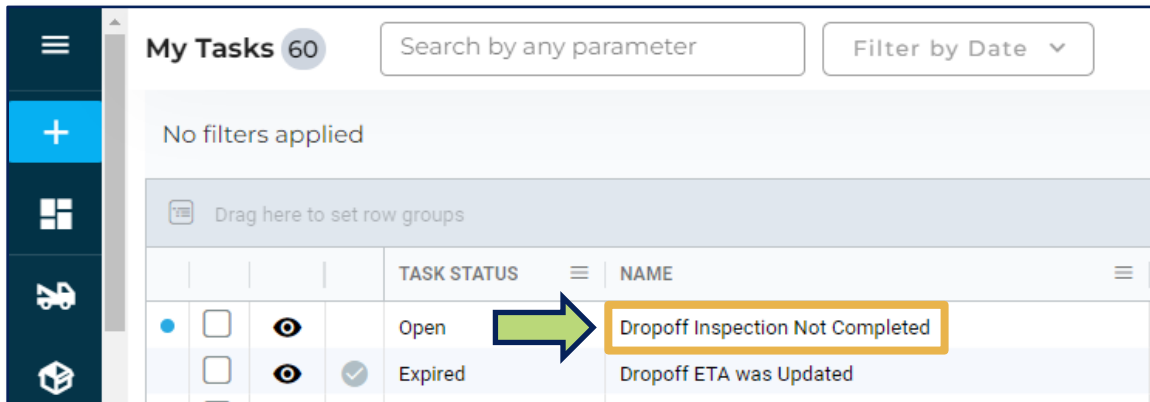
# OTHER POSSIBLE ORDER FLOWS

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# Review Order Chat - Task

**Review Order Chat** is created when a Transporter adds a chat message in an order. It can happen at any point in the order's active life span.

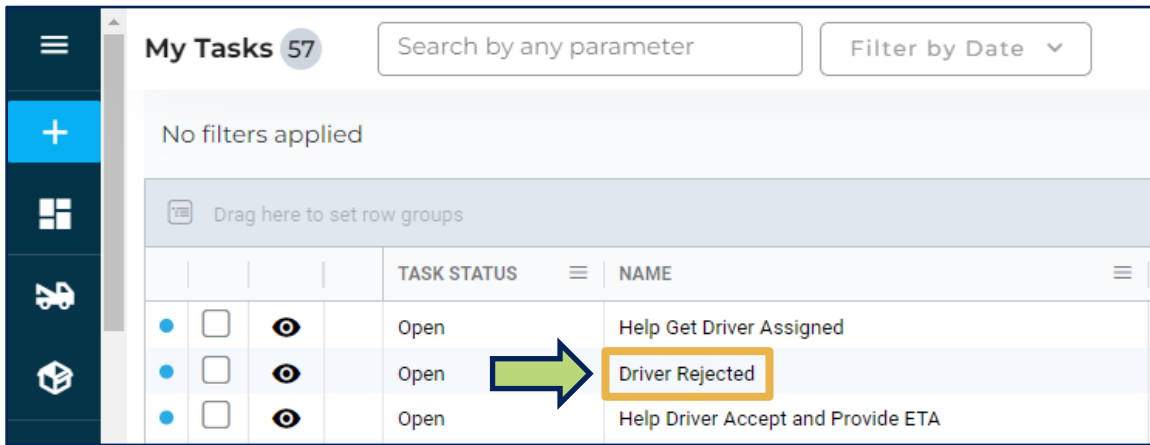3.3.2023

# Review Unclaimed Order - Task

**Review Unclaimed Order** is auto generated when a Transporter unclaims an order. Once this task is **resolved**, a new **Source//PU to DO** task will auto generate for the order. Contact the Transporter to get a reason for the order being unclaimed and resolve the task so it goes back into the open marketplace.
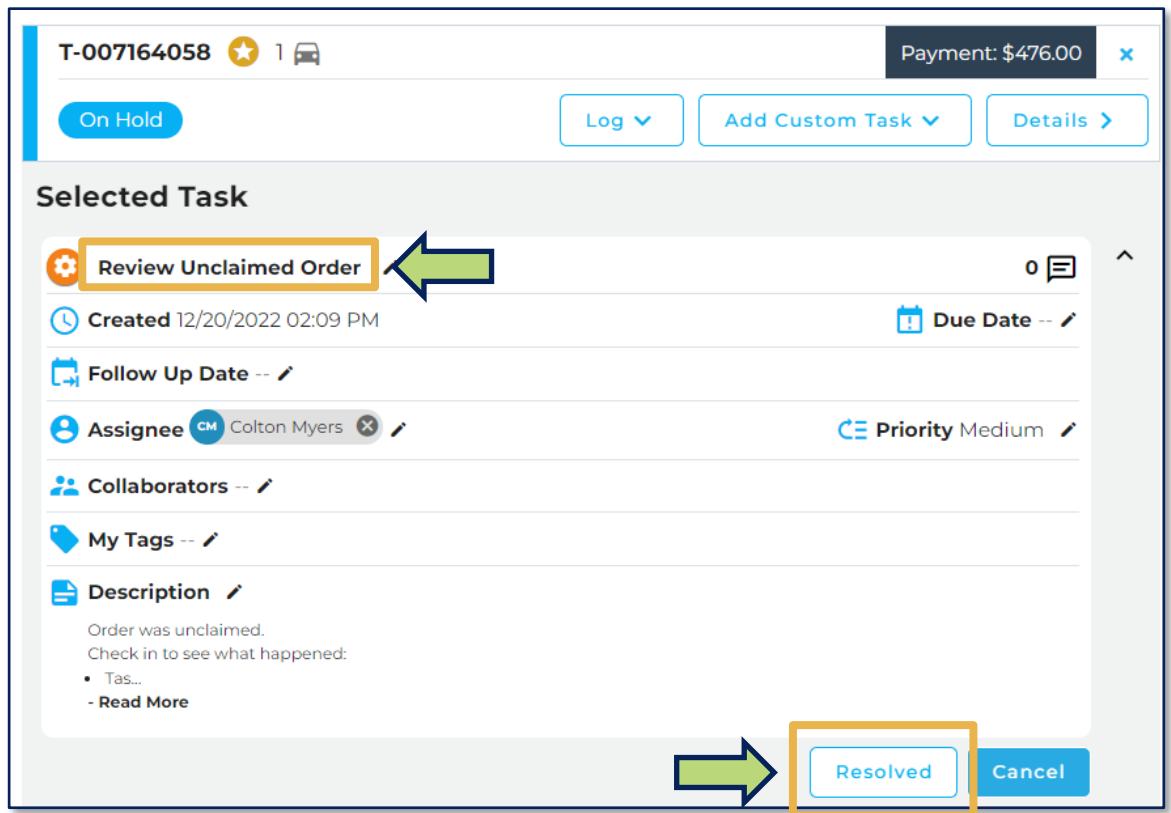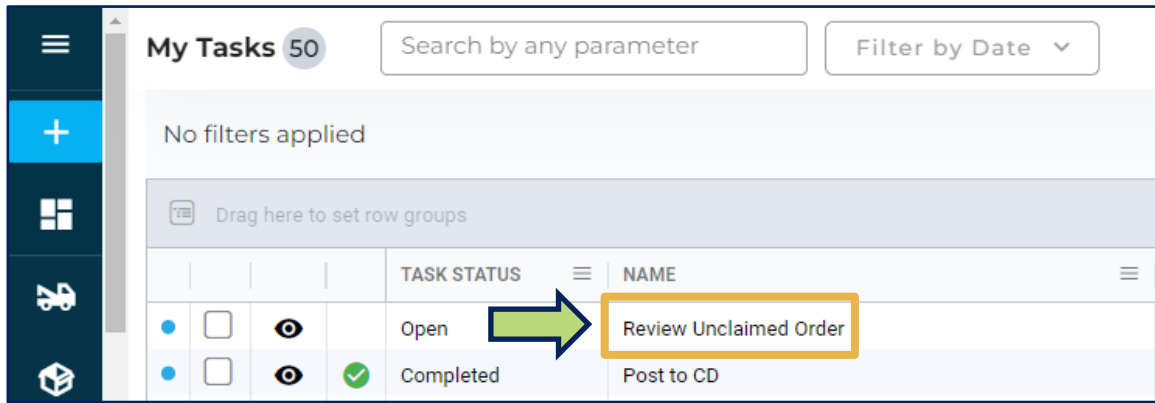




**NOTE:** When an order is **Unclaimed** it cannot be used to reset its **vehicle available date** clock. Either you can resolve it the same day/next day (task generated after hours) to make it **Available**, or the order needs to be put **"On Hold"** to stop the clock while you investigate or obtain the needed information.

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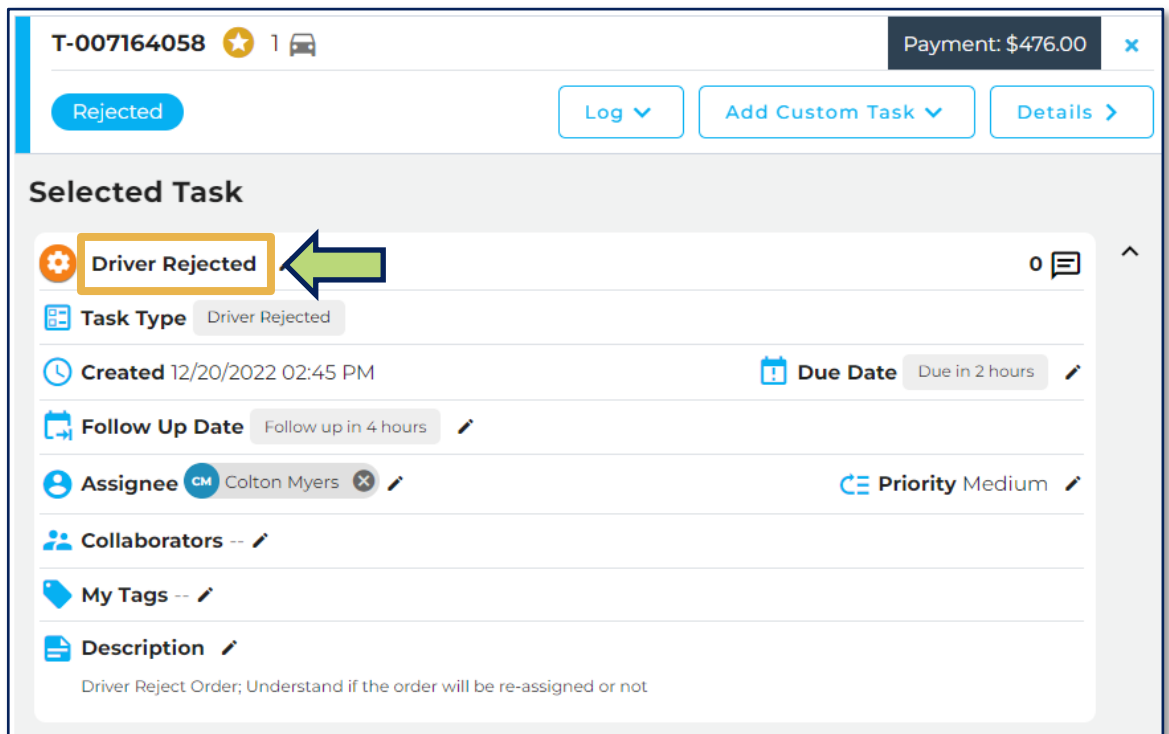
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# Driver Rejected - Task

**Driver Rejected** is an auto generated task when a Driver rejects an order. Once resolved, the **Help Get Driver Assigned** task will auto generate. Contact the Transporter or Driver to get a reason they rejected the order.

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# Verify Vehicle Delivered - Task

The **Verify Vehicle Delivered** task is an auto generated task that appears when a vehicle has been marked as delivered but no signature has been submitted. When this task appears, verify if the vehicle was delivered or not.

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