

HOLD ORDER FEATURE: JOB AID

This job aid details the **hold order** feature for **available orders** on the RunBuggy Platform. After reviewing, you will be able to identify when and how to perform the steps to put an order on hold and release it.

WHAT DOES THE HOLD ORDER FEATURE DO?

When an **available order** is **"Put on Hold"**, it is hidden from the open marketplace so Transporters can't see it or claim it and the order's **vehicle available date** clock is reset.



NOTE: Only **available orders** can be **"Put on Hold"**.



NOTE: The **vehicle available date** is defined as the date when the order is put on market after all draft or on hold statuses.

WHEN IS THE HOLD ORDER FEATURE TO BE USED?

The **hold order** feature is to be used by Shippers, or on the behalf of a Shipper, after they've created an order and realize that it is not ready at that time to be picked up by a Transporter.

WHAT HAPPENS WHEN AN ORDER IS "PUT ON HOLD"?

When an **available order** is **"Put on Hold"** it resets the clock for that order's **vehicle available date** and it assigns it with the status of **"On Hold"**. It is placed under the **"On Hold"** status designation in the **Transporter Orders** view shown below.

The screenshot displays the RunBuggy platform interface. On the left is a dark sidebar with navigation options: '+ Create an Order', 'Dashboard', 'ORDERS' (with a dropdown arrow), 'Transporter' (highlighted with a green box), 'Shipper', 'ADMINISTRATOR VIEWS' (with a dropdown arrow), 'Transport Order', and 'VINs'. The main content area has a top navigation bar with tabs: 'Available', 'Unassigned', 'Assigned', 'Completed', 'On Hold' (highlighted with a yellow box), and 'All'. Below the tabs is a 'Set filters' section. The main content shows '202 Results' and a section titled 'Orders On Hold'. A specific order is displayed with ID 'T-009211928' and a timestamp '11/30/20 12:11 PM'. Below the order ID, there are two location cards: 'HT RECOVERY ("REPO AGENT")' at '1810 S Vermont Ave, Los Angeles, CA 90006, USA' and 'NORWALK AUTO AUCTION' at '12405 Rosecrans Ave, Norwalk, CA 90650, USA'. A distance indicator shows '0 mi' between the two locations.



NOTE: An order will remain **"On Hold"** until you manually **"Release"** it.



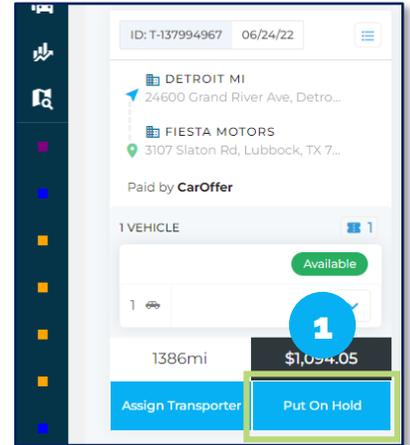
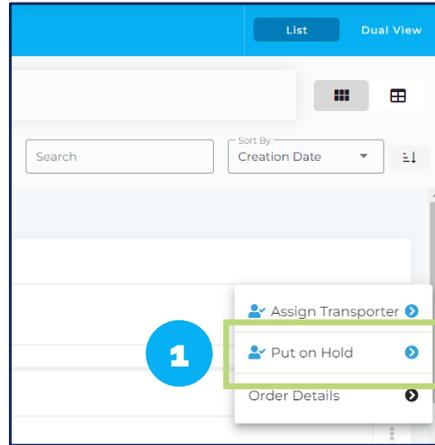
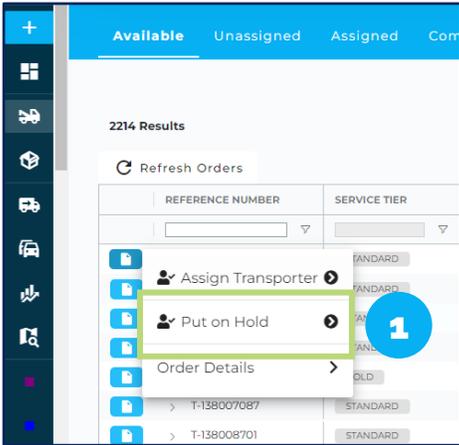
NOTE: Unclaiming an order will **NOT** reset the clock on the order's **vehicle available date**, only placing an order **"On Hold"** will.

WHAT HAPPENS WHEN AN ORDER IS "RELEASED" FROM A HOLD?

When an order is **"Released"** from its hold, it is once again given the status of **"Available"**, placed back on the open marketplace for Transporters to see and claim, and the **vehicle available date** clock is reset.

HOW TO PUT AN AVAILABLE ORDER “ON HOLD”

STEP 1: NAVIGATE TO THE AVAILABLE ORDER AND SELECT “PUT ON HOLD”.



STEP 2: ENTER IN HOW LONG THE HOLD IS TO LAST, THE REASON FOR PUTTING THE ORDER ON HOLD, THEN CLICK “SAVE”.

The screenshot shows the 'Put on Hold' dialog box. The 'For how long?' field is set to 3 hours. The 'Reason for putting on hold:' section has 'Order is missing information' selected. The 'Save' button is highlighted with a green box and a blue circle containing the number '2'.



NOTE: There is no minimum or maximum amount of time a hold can be set for.

If you leave the **“For how long?”** box empty, the hold will be indefinite, and the order will remain on hold until manually released.

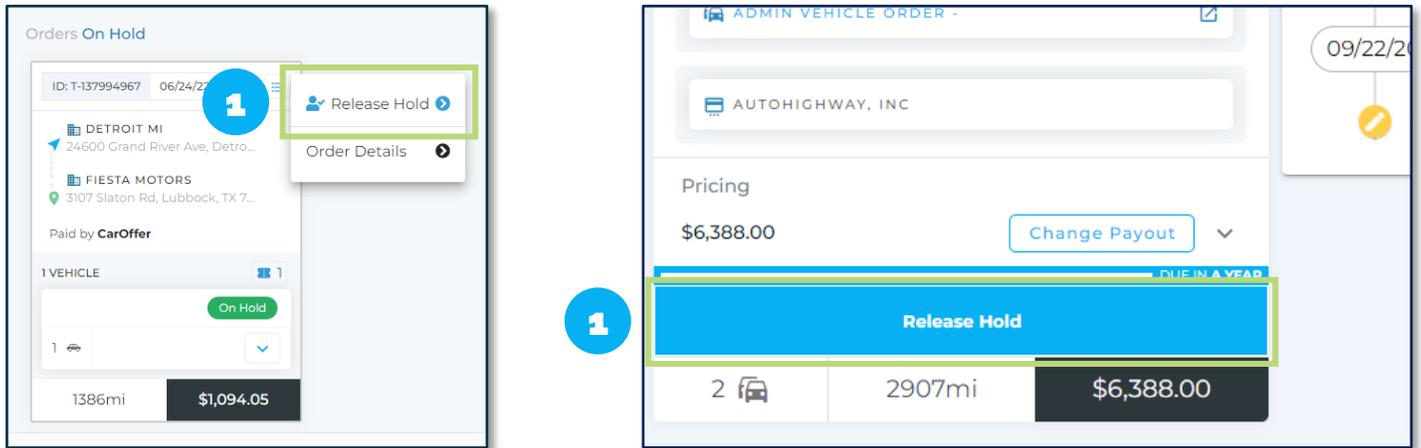
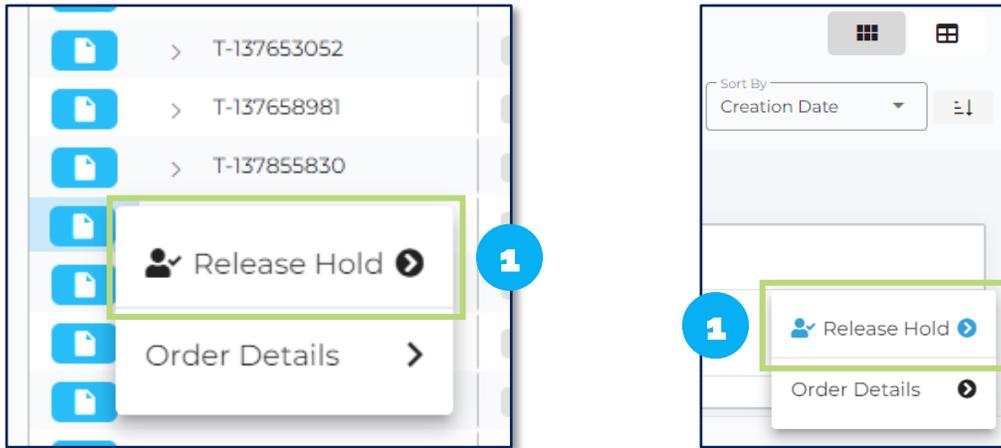


NOTE: Once an order is **“Put on Hold”** a new task **“Release From Hold”** is created and attached to the order in Winton.

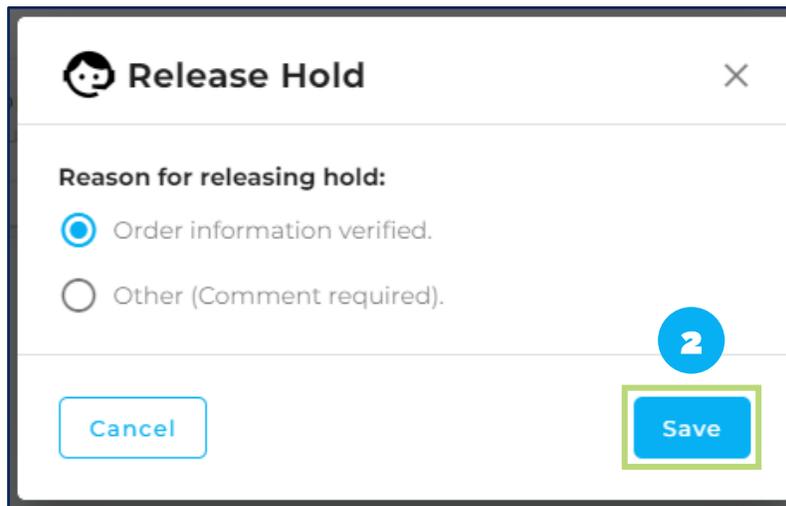
At that time, it's best practice to **Self Assign** that task and add a **Follow Up Date/Time** as well as a **Due Date**.

HOW TO “RELEASE” AN ORDER FROM A HOLD

STEP 1: NAVIGATE TO THE ORDER AND SELECT “RELEASE HOLD”.



STEP 2: SELECT THE REASON FOR RELEASING THE HOLD ON THE ORDER, THEN CLICK “SAVE”.



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