



3/11/2024

# Hitch Basic Dealership Training Resource Guide

Version 3.0



**TRAINING & DEVELOPMENT TEAM**  
RUNBUGGY, INC.

THIS PAGE WAS  
INTENTIONALLY LEFT BLANK



# Table of Contents

---

- Hitch Basic Dealership Training Resource Guide Overview ..... 4**
- Adding & Editing Users ..... 5
- Adding & Editing Transporter Accounts ..... 7
- Adding & Editing Drivers ..... 9
- Creating an Order ..... 11
- Modifying an Order ..... 15
- Order Details ..... 17
- Assigning & Reassigning a Transporter..... 22
- Assigning an Order to Marketplace..... 26
- Toggling Between Companies..... 28



# Hitch Basic Dealership Training Resource Guide Overview

This guide contains step-by-step training aids with links to videos showing you how to perform basic functions in the Hitch platform. The table of contents on the previous page is clickable for you to easily navigate the guide.

For you to best understand the content shown in this guide, be sure to review the **Glossary of Terms: RunBuggy Hitch**. Click the icon below to access & download the glossary.



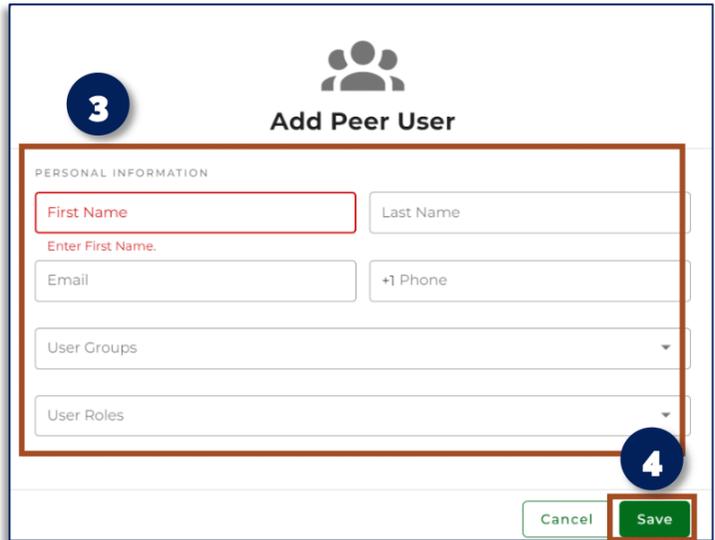
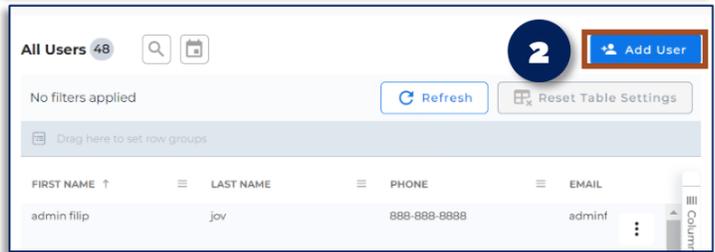
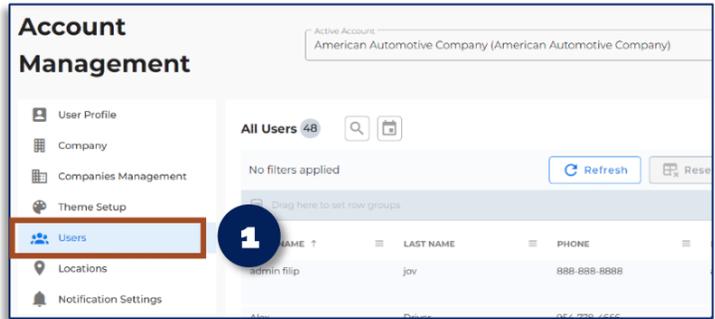
**CLICK THE ICON ABOVE TO ACCESS & DOWNLOAD THE GLOSSARY OF TERMS: RUNBUGGY HITCH.**

# Adding & Editing Users

Below are the steps for adding & editing Users in Hitch.

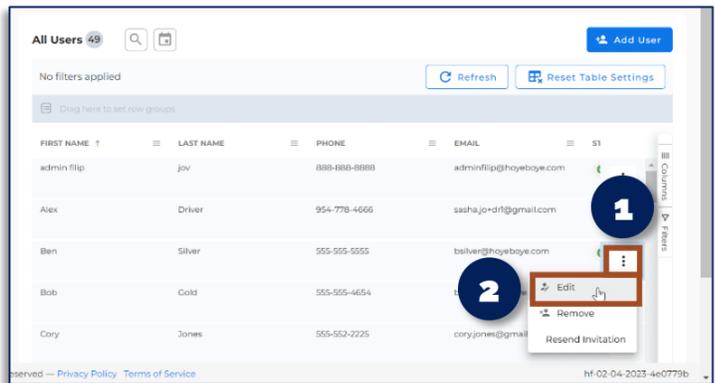
## ADDING A USER

1. From the Account Management page, click **Users**.
2. Click **Add User**.
3. Enter the User's personal information.
4. Click **Save**.



## EDITING A USER

1. Click the  icon on the User you want to edit.
2. Click **Edit**.



## EDITING A USER (CONTINUED)

3. Edit the User's information.
4. Click **Update**.



**NOTE:** Contact a RunBuggy Administrator to change any information that is grayed out.

**3** Edit Peer User

PERSONAL INFORMATION

First Name: Ben

Last Name: Silver

Email: bsilver@hoyeboye.com

Phone: +1 555-555-5555

**4**

Cancel Update

Click the thumbnail below to watch a video showing you how to add & edit Hitch Users.

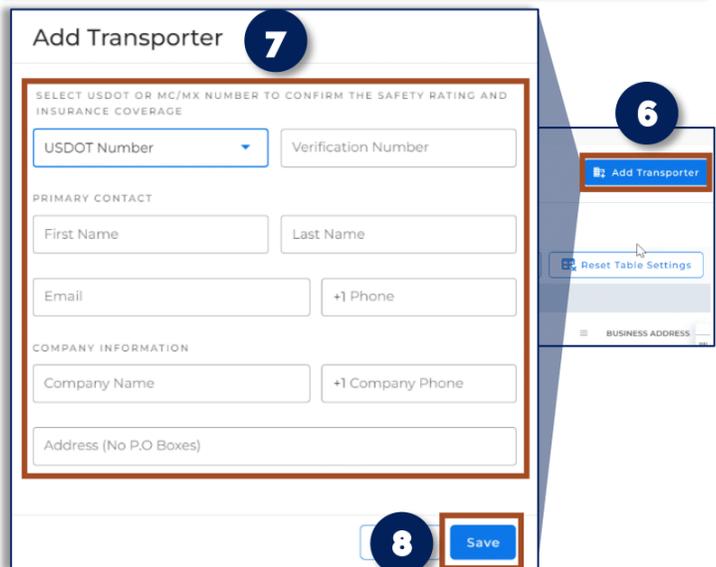
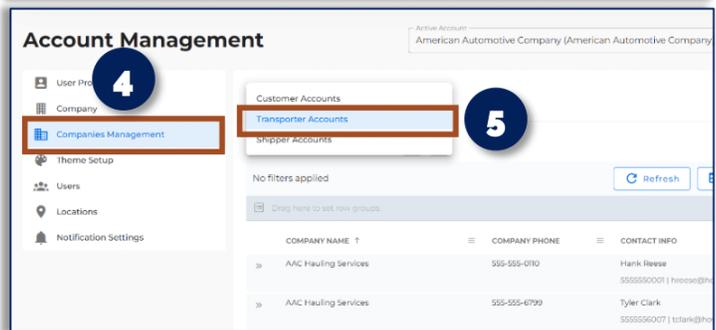
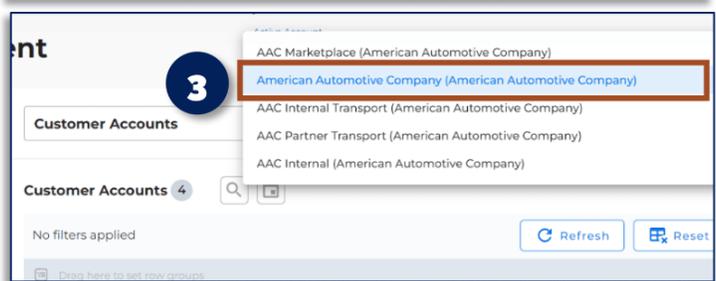
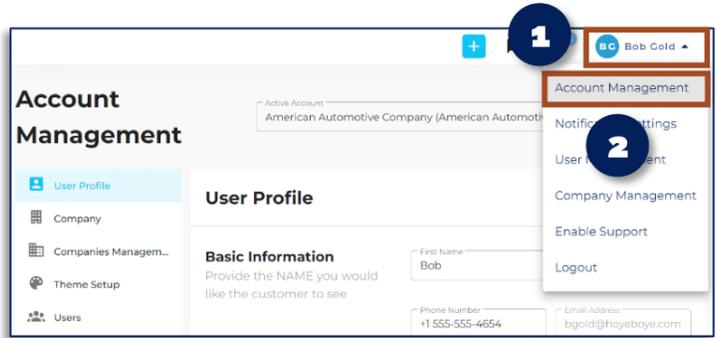


# Adding & Editing Transporter Accounts

Below are the steps for adding & editing Transporter Accounts in Hitch.

## ADDING A TRANSPORTER ACCOUNT

1. Click your username.
2. From the dropdown, click **Account Management**.
3. Select the **parent account** from the **active account** dropdown.
4. Click **Companies Management**.
5. Click **Transporter Accounts**.
6. Click **Add Transporter**.
7. Enter in the Transporter's information.
8. Click **Save**.



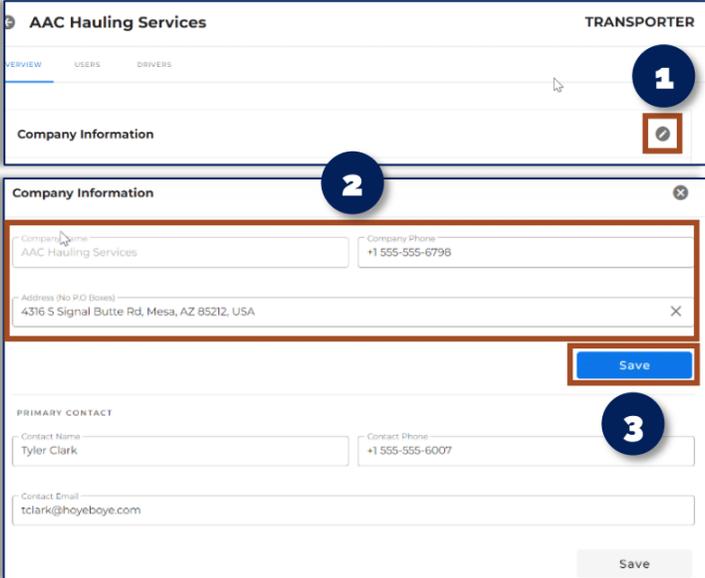
## EDITING A TRANSPORTER ACCOUNT

1. Click the  icon from the Transporter's account page.
2. Edit the Transporter's account information.



**NOTE:** Contact a RunBuggy Administrator to edit any information that is grayed out.

3. Click **Save**.



The screenshot shows the 'AAC Hauling Services' Transporter account page. The top navigation bar includes 'VIEW', 'USERS', and 'DRIVERS'. A 'TRANSPORTER' label is in the top right. A blue circle with the number '1' highlights the edit icon in the top right corner. Below the navigation is the 'Company Information' section, which is highlighted with a blue circle with the number '2'. This section contains fields for 'Company Name' (AAC Hauling Services), 'Company Phone' (+1 555-555-6798), and 'Address (No P.O. Boxes)' (4316 S Signal Butte Rd, Mesa, AZ 85212, USA). A blue 'Save' button is located at the bottom right of this section. Below the company information is the 'PRIMARY CONTACT' section, which is highlighted with a blue circle with the number '3'. This section contains fields for 'Contact Name' (Tyler Clark), 'Contact Phone' (+1 555-555-6007), and 'Contact Email' (tclark@hoyeboye.com). A grayed-out 'Save' button is at the bottom right of this section.

Click the thumbnail below to watch a video showing you how to add & edit Transporter Account in Hitch.



# Adding & Editing Drivers

Below are the steps for adding & editing Drivers in Hitch.

## ADDING A DRIVER

1. Click **Drivers**.
2. Click **Add Driver**.

3. Enter in the Driver's information.



**NOTE:** When entering in the Driver's information, the following fields are required:

- **First & Last Name**
- **Email Address**
- **Phone Number**
- **Truck Identifier**
- **Payout Percentage**
- **Truck Capacity (Must be greater than 0)**

4. Click **Save**.

The screenshot shows the 'Hauling Services' interface. At the top right, it says 'TRANSPORTER'. Below that, there's a 'USERS' section with a dropdown menu where 'DRIVERS' is selected. A circled '1' is next to this dropdown. To the right, there's a search bar with the placeholder text 'y Name, Email or Phone' and a circled '2' next to it. Below the search bar, there are two buttons: 'Add Driver' (highlighted with a red box) and 'Bulk Upload'.

The screenshot shows the 'Add Driver' form. At the top, there's a plus sign and a person icon, followed by the title 'Add Driver' and a circled '3'. Below this, there are two toggle switches: 'TWIC Card' and 'FAST Clearance'. Under 'Truck Information', there's a 'Truck Identifier' field. Below that, there are two input fields: 'Payout Percentage' (with a '%' sign) and 'Truck Capacity'. Under 'Truck Type', there are three buttons: 'Open' (highlighted with a blue box), 'Enclosed', and 'Flatbed'. Under 'Truck Allowance', there are three toggle switches: 'Non Operational', 'Oversize', and 'Motorcycle'. At the bottom right, there's a 'Save' button (highlighted with a red box) and a circled '4' next to it.

## EDITING A DRIVER

1. Click the icon on the Driver you want to edit.
2. Click **Edit**.

The screenshot shows the 'Drivers' list. At the top, there's a search bar with the placeholder text 'Search by Name, Email or Phone' and a circled '1' next to it. Below the search bar, there are two buttons: 'Add Driver' and 'Bulk Upload'. The list contains two driver entries. The first entry is for 'John Bronzo' with contact info and a 'TRUCK: 1 OPEN' status. The second entry is for 'Richard Sauseda' with contact info and a 'LAST LOGIN: 02/01/2023 06:4' status. A circled '2' is next to the 'Edit' button in the actions column for the first driver.

### EDITING A DRIVER (CONTINUED)

3. Edit the Driver's information.



**NOTE:** Contact a RunBuggy Administrator to edit any information that is grayed out.

4. Click **Save**.

3

### Edit Driver

Driver Information

First Name: John

Last Name: Bronze

Email Address: jbronze@hoyeboye.com

Phone Number: +1 555-555-5555

TWIC Card:

FAST Clearance:

Truck Information

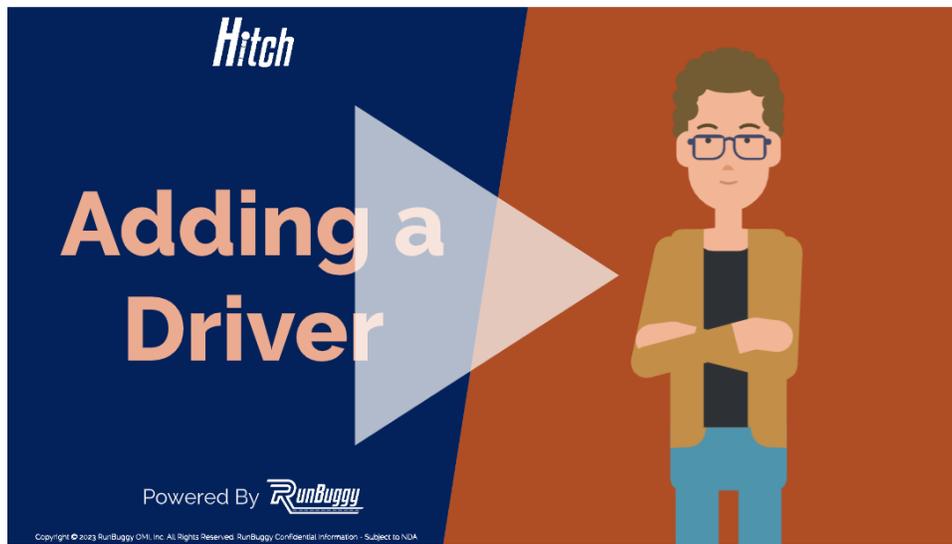
Truck Identifier: 1

Payout Percentage: 0 %

Truck Capacity: 9

4 Save

Click the thumbnail below to watch a video showing you how to add Drivers in Hitch.

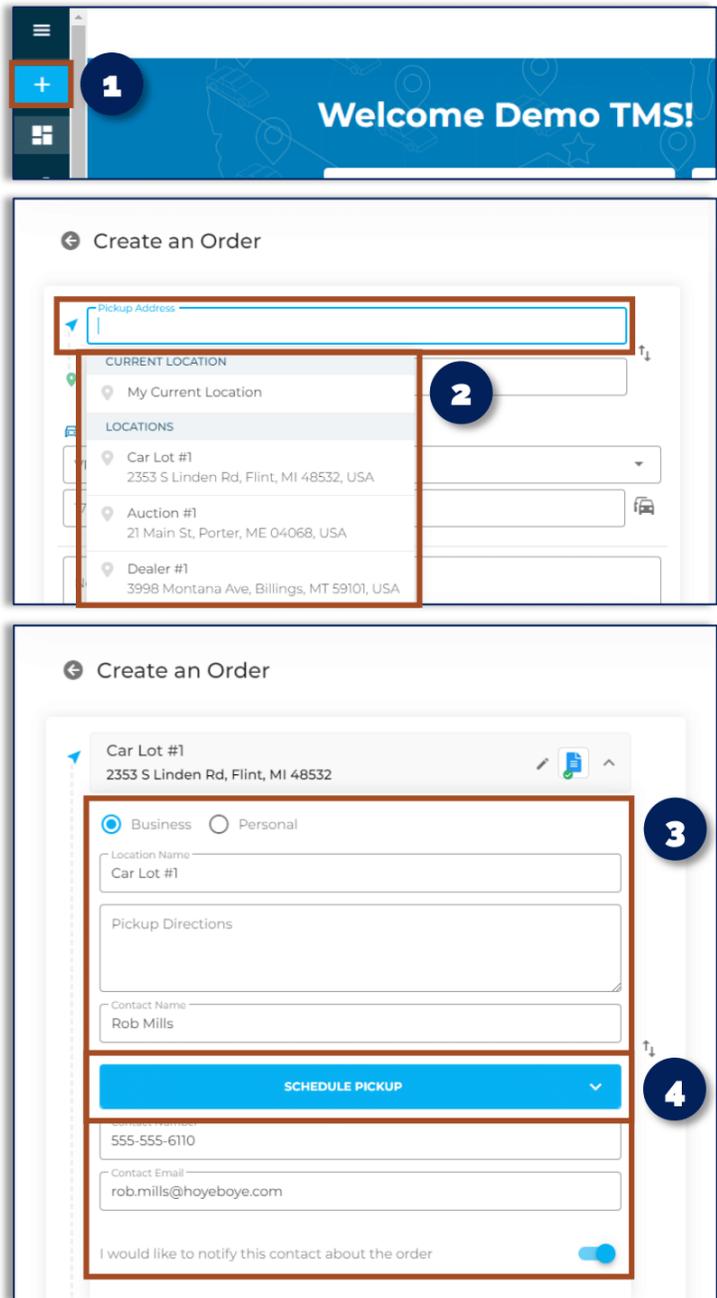


# Creating an Order

Below are the steps for creating an order in Hitch.

## CREATING AN ORDER

1. From the dashboard, click the  at the top left of the screen.
2. Enter in or select the **Pickup & Dropoff Addresses**.
3. If needed, enter in the information for the addresses.
4. **(Optional)** Click **SCHEDULE PICKUP** or **SCHEDULE DROPOFF**, to schedule a date & time window for pickup & dropoff.



## CREATING AN ORDER (CONTINUED)

5. Select a **date & time window** for pickup & dropoff.
6. Click **OK**.

SCHEDULE PICKUP

Add Time Window

2024  
Thu, Jan 18

January 2024

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

From: 12 pm To: 02 pm

OK

7. Add the **VINs** to be moved.

Create an Order

Car Lot #1  
2353 S Linden Rd, Flint, MI 48532

Auction #1  
21 Main St, Porter, ME 04068

ADD VEHICLES

VIN Available

Multiple 17 digit VIN separated by comma or space

8. **(Optional)** Enter in additional details about the vehicles by clicking the icon.

ADD VEHICLES

JH4CL96924C018954  
2004 Acura TSX

1N4BL2AP9CN563214  
2012 Nissan Altima

SNPEC4AC4EH948487  
2014 Hyundai SONATA

## CREATING AN ORDER (CONTINUED)

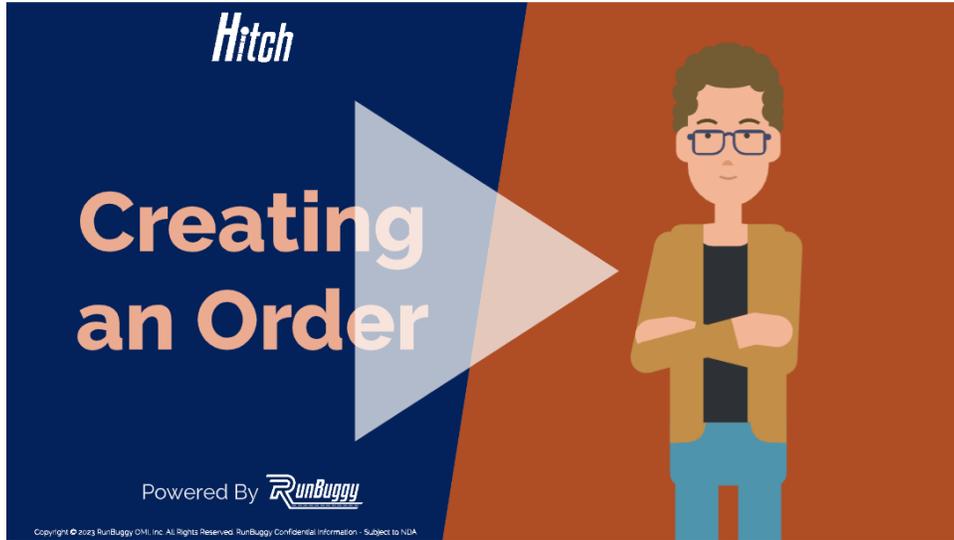
9. (Optional) Click **Assign Transporter**, select a Transporter, & click **Assign Transporter**.

TRANSPORTER	LAST DELIVERY	CAPACITY	LOAD	VINS IN TRANSIT
Dalership Transport	2024-01-18T19:39:05.539Z	6%	3	1
Seal Beach Trucking		10%	2	2
Malibu Trucking Inc.		12%	1	1
Santa Monica Trucking Co		8%	1	1
Thomas Family Hauling		100%	3	3
Car2Active Network		3%	1	1

10. Enter **amounts** to move the vehicles.  
 11. (Optional) Click **Add Line Item** & add a line item.  
 12. Enter any additional **Notes** about the order.  
 13. Click **Place Order**.

## CREATING AN ORDER (CONTINUED)

Click the thumbnail below to watch a video showing you how to create an order in Hitch.



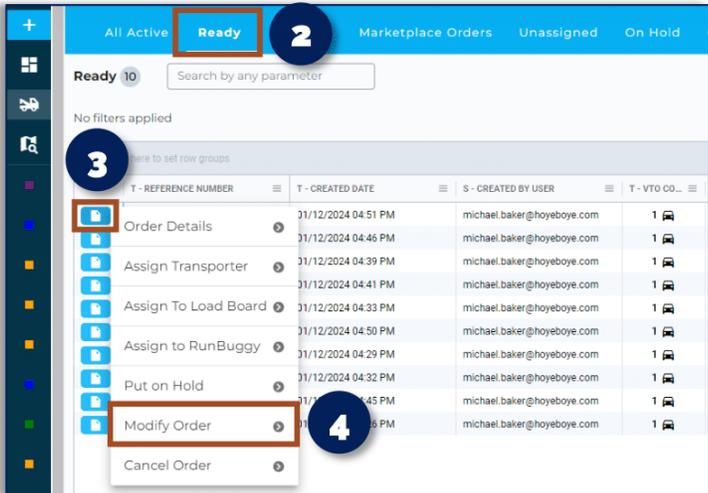
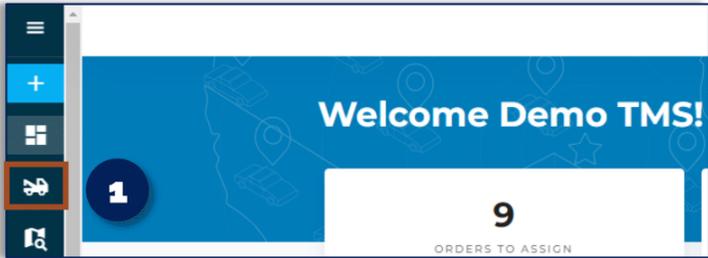
# Modifying an Order

Below are the steps for modifying an order to the in Hitch.

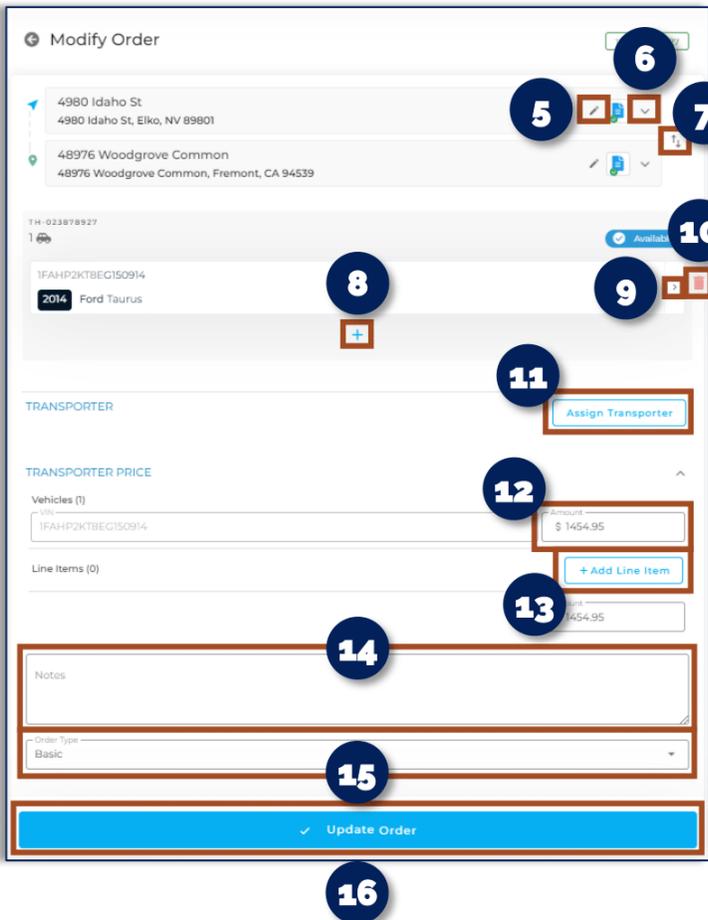
## MODIFYING AN ORDER

- From the dashboard, click the  at the top left of the screen.
- Select the **Ready** tab.
- Click the  icon on the order you want to assign to the RunBuggy Marketplace.
- Click **Modify Order**.

**CAUTION:** An order can only be fully modified while it's still **Available**. Once **Claimed**, you won't be able to **modify the addresses, add or remove vehicles, or adjust the Transporter price.**



- To modify the **pickup or dropoff addresses**, click their  icon.
- To modify the pickup or **dropoff addresses details**, click their  icon.
- To **swap the pickup & dropoff addresses**, click the  icon.
- To **add a vehicle to the order**, click the  icon.
- To **edit a vehicle's details**, click the  icon.
- To **remove a vehicle from the order**, click the  icon.
- To assign a transporter to the order, click **Assign Transporter**.
- To adjust the amount the Transporter price of a vehicle on the order, change the **Amount**.
- To add a line item to the order, click **Add Line Item**.
- Add any additional notes to the order in the, **Notes** section.
- To change the order type, select a type from the **Order Type** dropdown.
- Click **Update Order**.



## MODIFYING AN ORDER (CONTINUED)

Click the thumbnail below to watch a video showing you how to modify an order in Hitch.



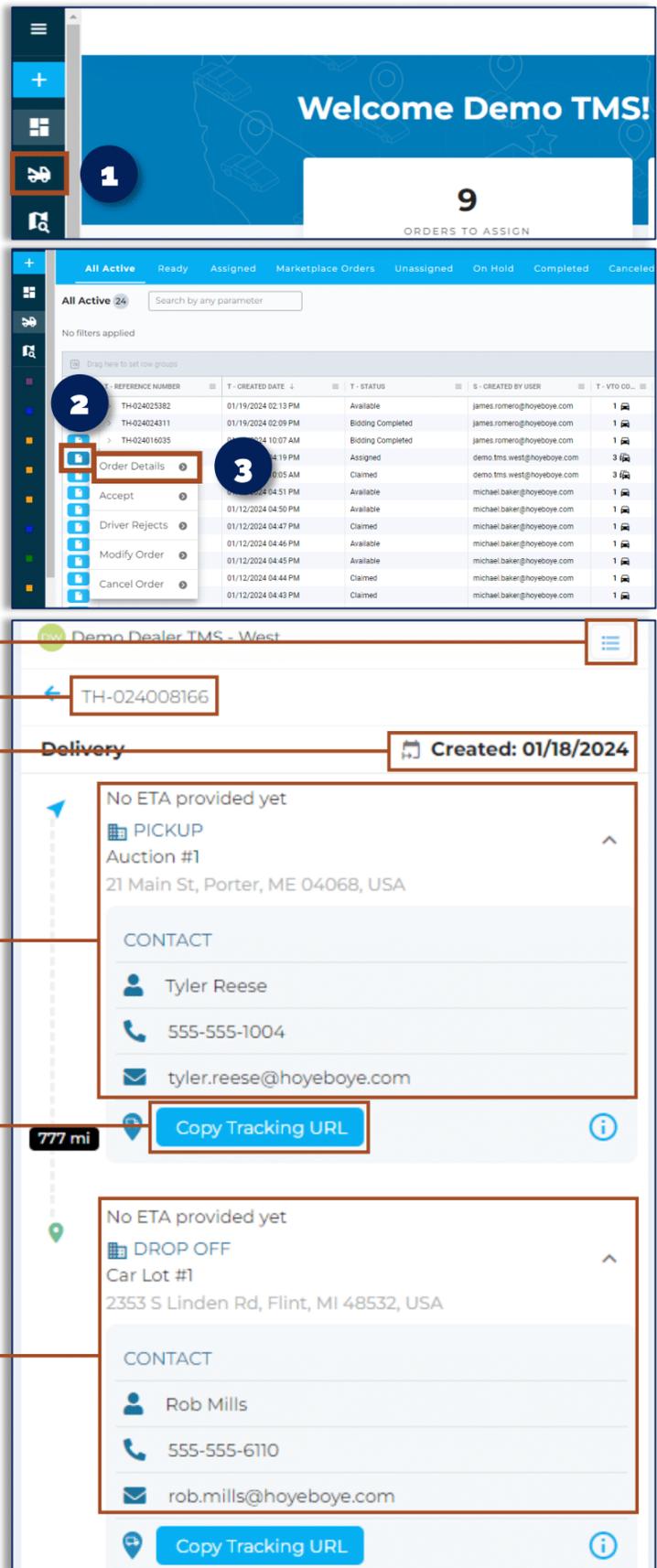
# Order Details

Below are the steps for viewing an order's details in Hitch & explanations of an order's details.

## ORDER DETAILS

- From the dashboard, click the  at the top left of the screen.
- Click the  icon on any order.
- Click **Order Details**.

**NOTE:** The order details you see will depend on the status of the order.



The screenshot shows the Hitch TMS interface. At the top, there's a 'Welcome Demo TMS!' banner with 'ORDERS TO ASSIGN' and a count of 9. Below is a navigation bar with tabs: All Active, Ready, Assigned, Marketplace Orders, Unassigned, On Hold, Completed, Canceled. A table lists orders with columns for Reference Number, Created Date, Status, and Created By User. The 'Order Details' button is highlighted for the order TH-024008166. The details page shows 'Delivery' status, 'Created: 01/18/2024', and pickup/drop-off locations with contact info. A 'Copy Tracking URL' button is visible for both pickup and drop-off details.

**Order Options Button**  
Click this button to view the order options.

**T - Reference Number**

**Order Creation Date**

**Pickup Details**

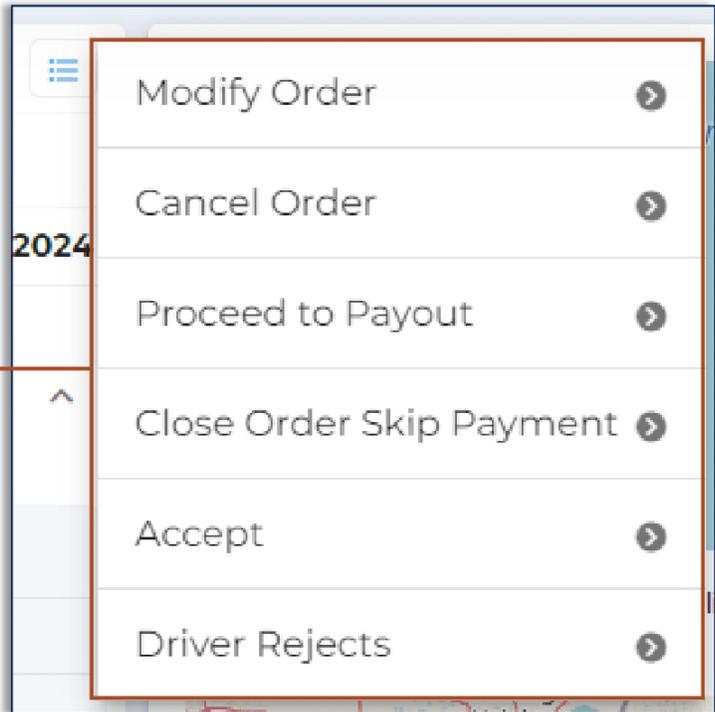
**Copy Tracking URL Button**  
Click this button to copy the tracking URL of the location of the order.

**Drop Off Details**

## ORDER DETAILS (CONTINUED)

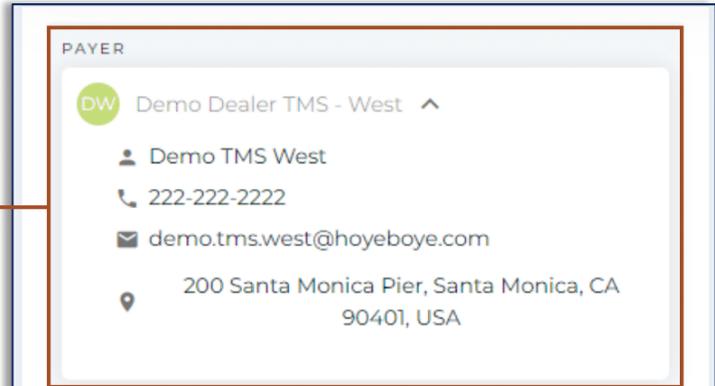
Order Options

 **NOTE:** The available order options will depend on the status of the order.



A screenshot of a mobile application showing a list of order options. The options are: Modify Order, Cancel Order, Proceed to Payout, Close Order Skip Payment, Accept, and Driver Rejects. Each option has a right-pointing arrow icon.

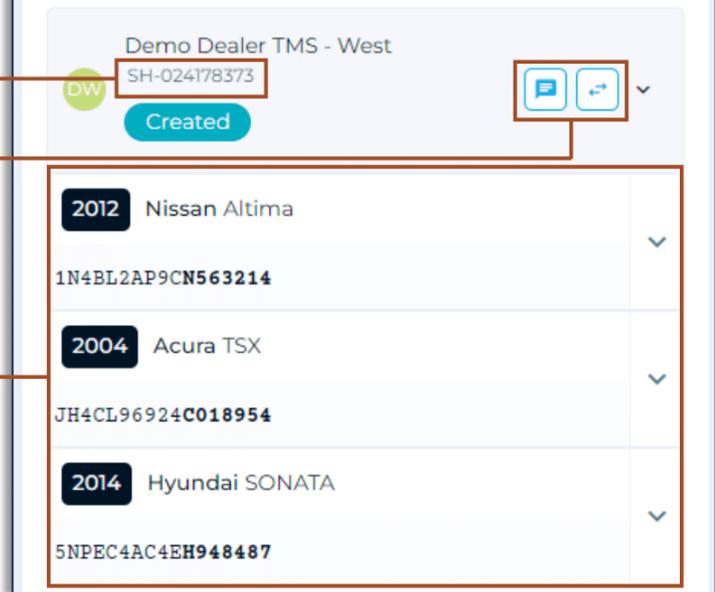
Paying Company Details



A screenshot of the 'PAYER' section in the application. It displays the following information: Demo Dealer TMS - West (with a dropdown arrow), Demo TMS West, phone number 222-222-2222, email demo.tms.west@hoyeboye.com, and address 200 Santa Monica Pier, Santa Monica, CA 90401, USA.

S - Reference Number

-  Click to chat with the Driver.
-  Click to swap vehicles with another order.



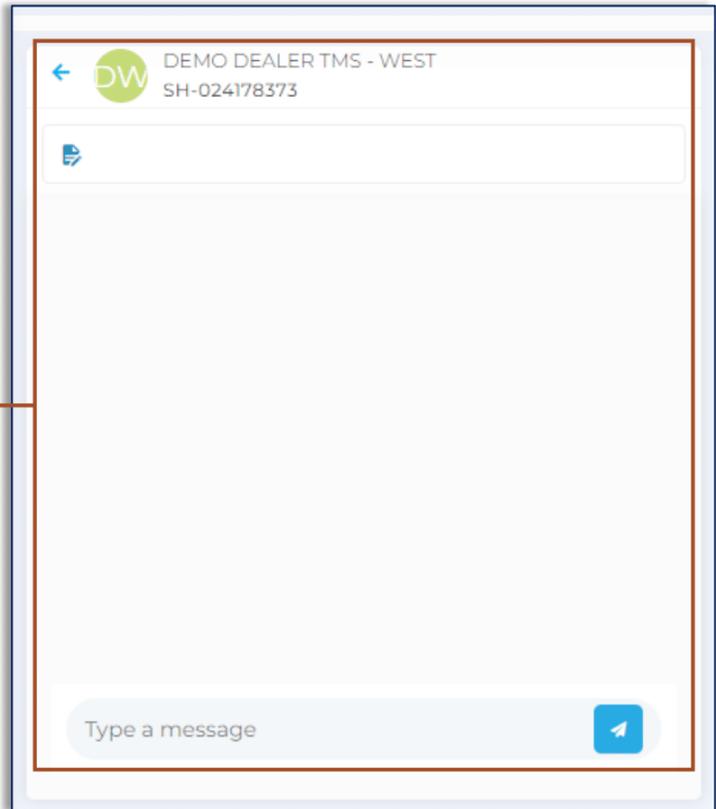
A screenshot of the vehicle details section. It shows the dealer name 'Demo Dealer TMS - West' and a reference number 'SH-024178373' with a 'Created' status. Below this is a list of vehicles with their year, make, and VIN, each with a dropdown arrow on the right:

2012	Nissan Altima	1N4BL2AP9CN563214
2004	Acura TSX	JH4CL96924C018954
2014	Hyundai SONATA	5NPEC4AC4EH948487

Vehicle(s) Details  
To further expand a vehicle's details, click its  icon on the right.

## ORDER DETAILS (CONTINUED)

Driver Chat Window



Expanded Vehicle Details Window

A screenshot of a 'Details' window. The title 'Details' is at the top left. Below it is a table with two columns: a label and a value. The table contains the following information:

Details	
OPERATIONAL	Yes
MISSING KEYS	No
ROLLS	Yes
MAKE	Nissan
MODEL	Altima
TYPE	Car
VIN	1N4BL2AP9CN563214
YEAR	2012

## ORDER DETAILS (CONTINUED)

Driver's Details

Bill of Lading (BOL) Details  
Click the  icon to download a PDF of the order's BOL.

Transport Company Name

Fare & Transporter Price  
Click the  icon to expand their details.

Order Margin Percentage

Order's Next Task Due Date

Order Option Buttons

Number of Vehicles | Delivery Distance

 Mike Thomas 

 Mike Thomas  
 555-555-1014  
 mike.thomas@hoyeboye.com

---

**Truck Name** Mike's Truck  
**Truck Type** Open  
**Truck Capacity** 4

BOL\_-024008166.pdf 

 THOMAS' FAMILY HAULING

Fare  
\$0.00 

Transporter Price  
\$2,136.54 

Margin  
Order Margin 100%

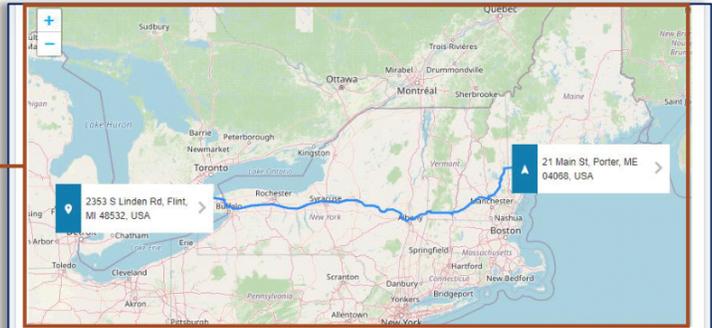
**PAST DUE**

<b>Accept</b>	<b>Driver Rejects</b>
3 	777mi

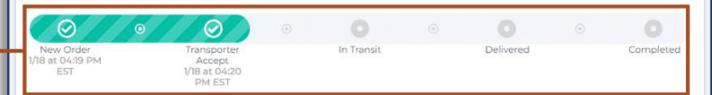
 **NOTE:** The available order option buttons will depend on the status of the order.

## ORDER DETAILS (CONTINUED)

Map of Route from Pickup to Drop Off



Timeline of Order Progress



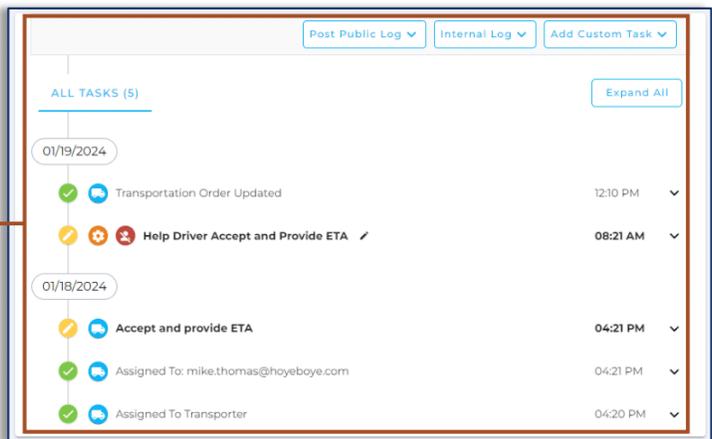
Activity Timeline

Click the **View Activity Timeline** button to hide or expand the activity timeline.



Order's Task Management Window

This window includes all tasks associated with the order with their details & timestamps. It also includes buttons to **Post Public Logs**, **Internal Logs**, & **Add a Custom Task**.



Click the thumbnail below to watch a video showing you how to view an order's details in Hitch.

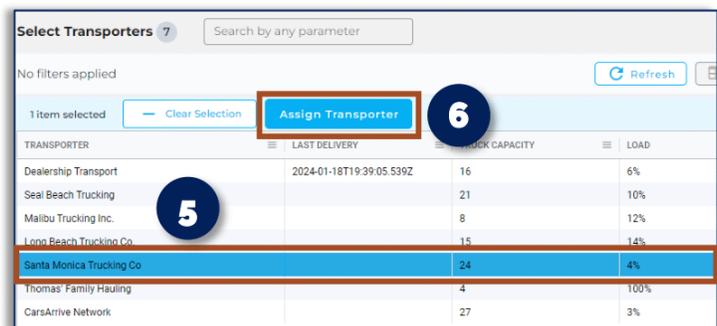
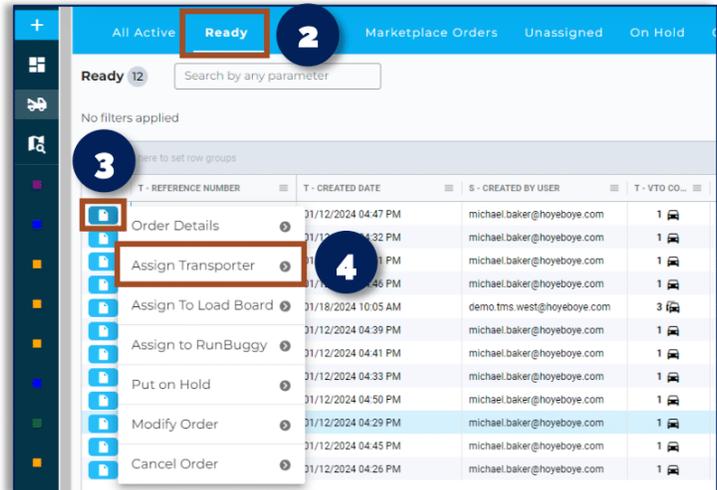
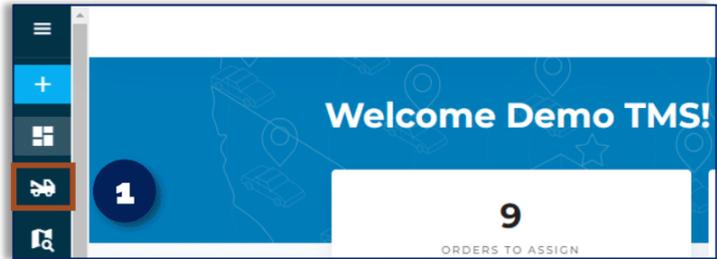


# Assigning & Reassigning a Transporter

Below are the steps for assigning & reassigning a Transporter in Hitch.

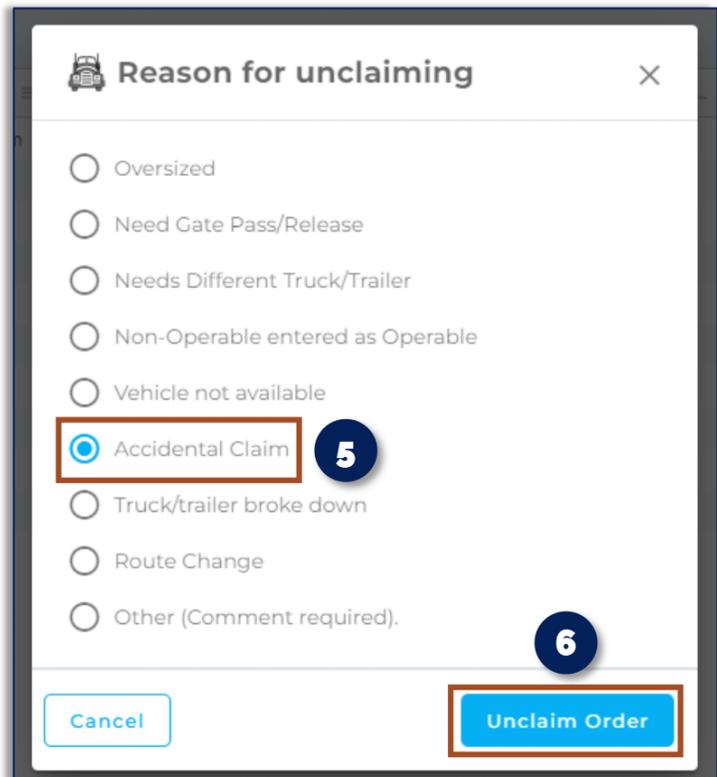
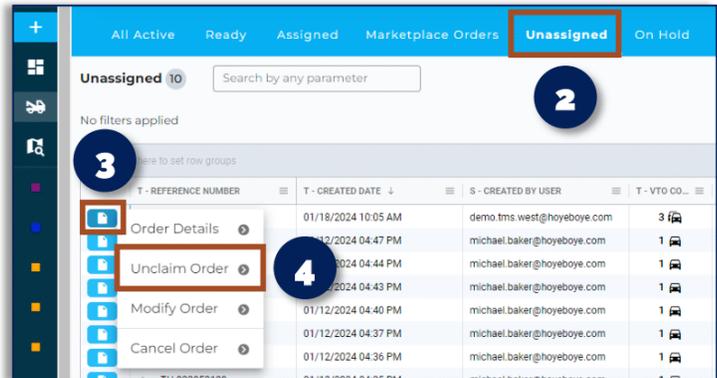
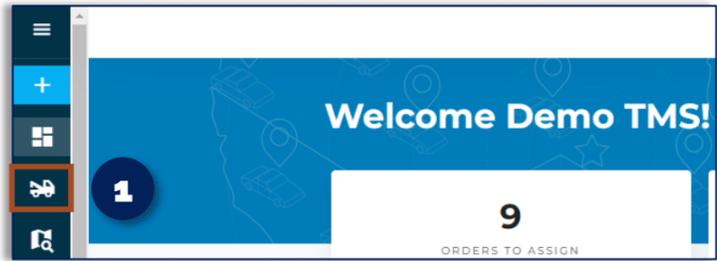
## ASSIGNING A TRANSPORTER

1. From the dashboard, click the  at the top left of the screen.
2. Select the **Ready** tab.
3. Click the  icon on the order you want to assign.
4. Click **Assign Transporter**.
5. Select the **Transporter**.
6. Click **Assign Transporter**.



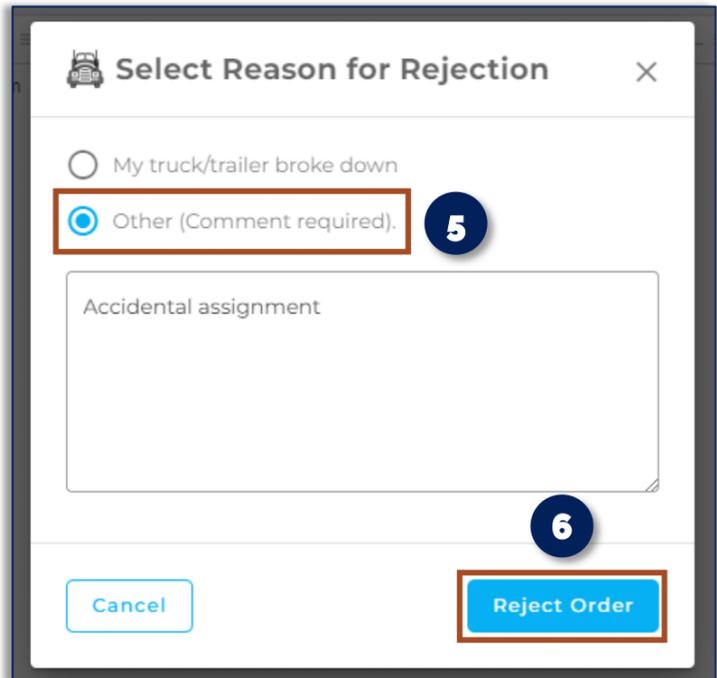
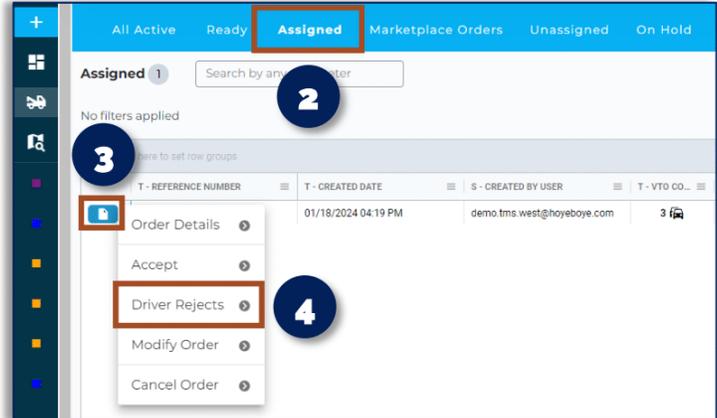
## REASSIGNING A TRANSPORTER (NO DRIVER ASSIGNED)

1. From the dashboard, click the  at the top left of the screen.
2. Select the **Unassigned** tab.
3. Click the  icon on the order you want to reassign.
4. Click **Unclaim Order**.
5. Select **Accidental Claim**.
6. Click **Unclaim Order**.
7. Repeat the steps for assigning a Transporter.



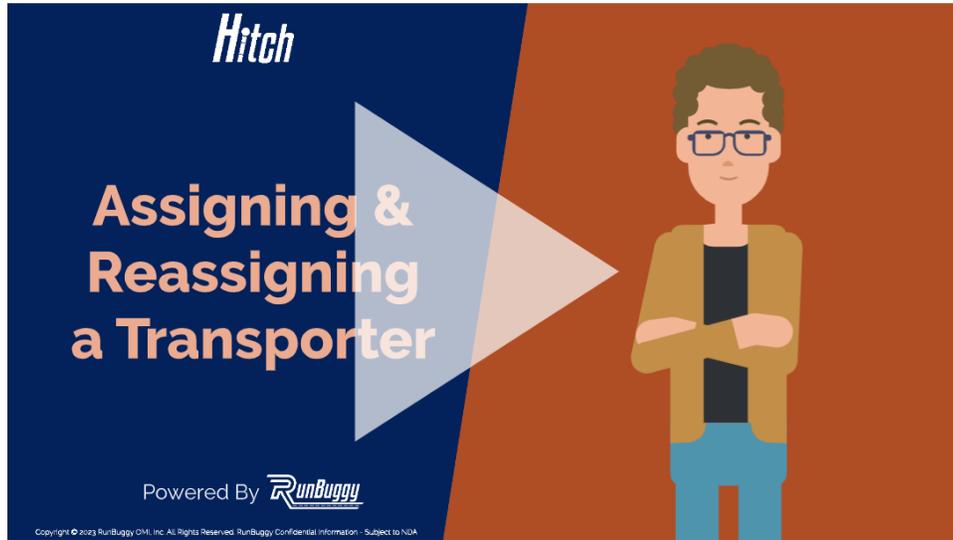
## REASSIGNING A TRANSPORTER (DRIVER ASSIGNED)

1. From the dashboard, click the  at the top left of the screen.
2. Select the **Assigned** tab.
3. Click the  icon on the order you want to reassign.
4. Click **Driver Rejects**.
5. Select **Other** & enter in **Accidental assignment**.
6. Click **Reject Order**.
7. Repeat the steps for assigning a Transporter.



## ASSIGNING & REASSIGNING A TRANSPORTER (CONTINUED)

Click the thumbnail below to watch a video showing you how to assign & reassign a Transporter in Hitch.

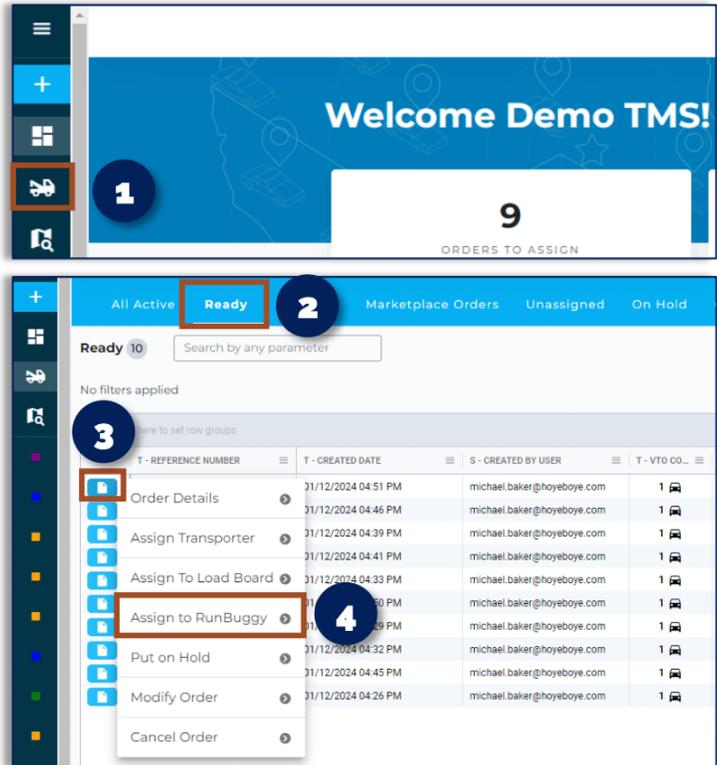


# Assigning an Order to Marketplace

Below are the steps for assigning an order to the RunBuggy Marketplace in Hitch.

## ASSIGNING AN ORDER TO MARKETPLACE

1. From the dashboard, click the  at the top left of the screen.
2. Select the **Ready** tab.
3. Click the  icon on the order you want to assign to the RunBuggy Marketplace.
4. Click **Assign to RunBuggy**.



## ASSIGNING AN ORDER TO MARKETPLACE (CONTINUED)

5. Select the **RunBuggy Account** to assign the order to.
6. Select the **Payment By** company.
7. Select the **DELIVERY OPTION**.
8. Click **Place Order**.

The screenshot shows a web form titled "Assign to RunBuggy Account". It contains several fields and a list of options:

- Field 5: "Select RunBuggy Account" with a dropdown menu showing "Demo TMS Shipper".
- Field 6: "Payment By" with a dropdown menu showing "Demo TMS Shipper".
- Section 7: "DELIVERY OPTION" with four radio button options:
  - Standard: \$444.97 (selected)
  - Gold: \$696.05
  - Platinum: \$624.75
  - Repo: \$477.81
- Field: "Additional Notes" (empty text box).
- Buttons 8: "Cancel" and "Place Order" (highlighted in blue).

Click the thumbnail below to watch a video showing you how to assign an order to the RunBuggy Marketplace in Hitch.



# Toggleing Between Companies

Below are the steps for toggleing between companies in Hitch.

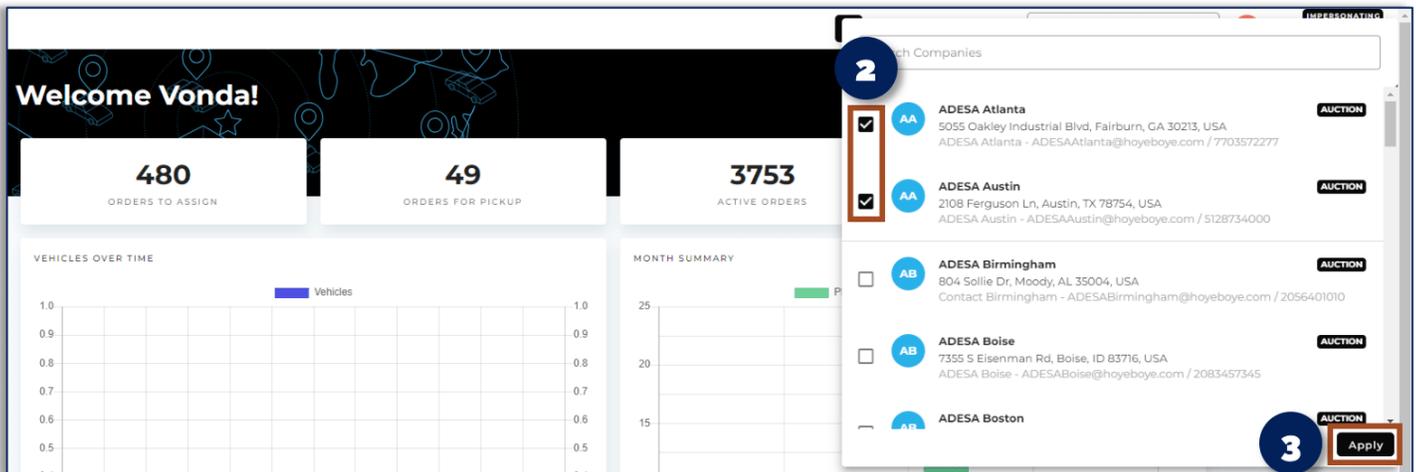
\*\*\* THIS ONLY OCCURS IF YOU HAVE ACCESS TO MULTIPLE DEALERSHIP HITCH ACCOUNTS. \*\*\*

## TOGGLING BETWEEN COMPANIES

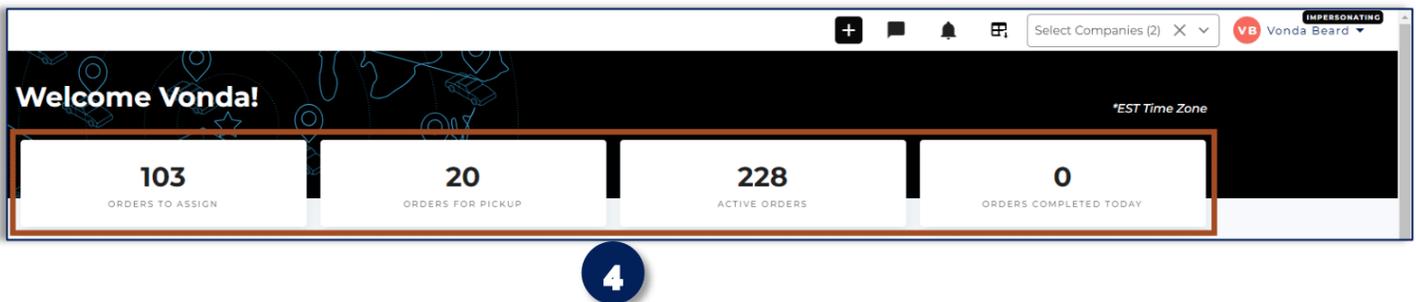
1. From the dashboard page, click **Select Companies**.



2. Select the company or companies you want to filter.
3. Click **Apply**.



4. The orders & VINs you see will only be from the company or companies you have selected.



## TOGGLING BETWEEN COMPANIES (CONTINUED)

Click the thumbnail below to watch a video showing you how to toggle between companies in Hitch.

