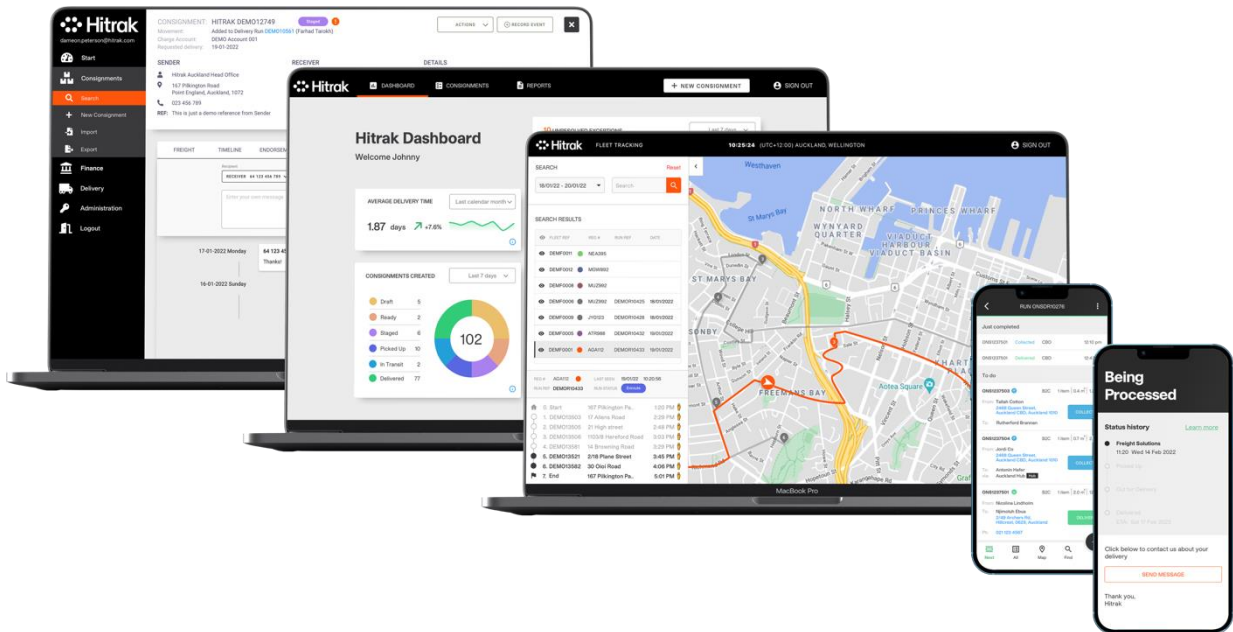# Hitrak

Transport Management System

Driver App User Guide

The Hitrak Driver app enables drivers and warehouse team members to collect, deliver and manage consignments, communicate with consignees, and start and complete the delivery runs created by Dispatch teams.

This document details the functions of the app and can be used for training and as an ongoing reference for users.

Driver, vehicle and run creation is completed in the Admin app. For instructions on these functions, please refer to the Dispatch User Guide.

To get users underway with the basics, see the Driver Quick Start Guide section.

For full details on all functions of the app, refer to the Detailed User Guide.

Contents

# Quick Start Guide

Starting and Viewing a Run

Each user will receive an email with login credentials and a link to the driver application. Dispatchers assign runs for the day and may add more tasks while the run is in progress. Drivers can view and start their runs from the Home page.

- Log in to the app to view all assigned runs.

- Tap Preview to view details of the run's vehicle, start and end locations and tasks.

- When ready to begin, tap Start Run.
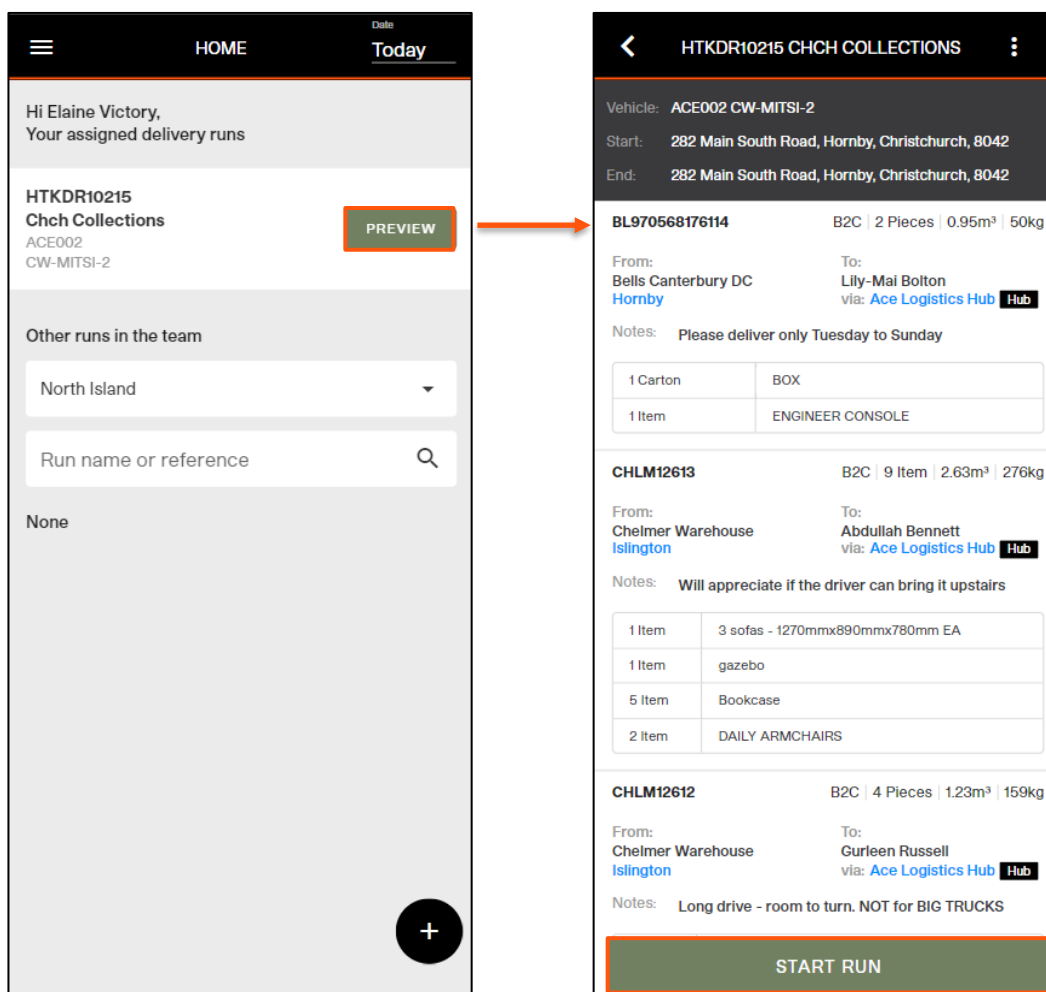
Once a run has started, tasks can be viewed using the 3 tabs at the bottom of the page:

1. Next: The next 4 tasks, and the 2 most recently completed tasks.

2. All: A compact view of all tasks on the run.

3. Map: A map view with the option to view all tasks or only the remaining tasks.

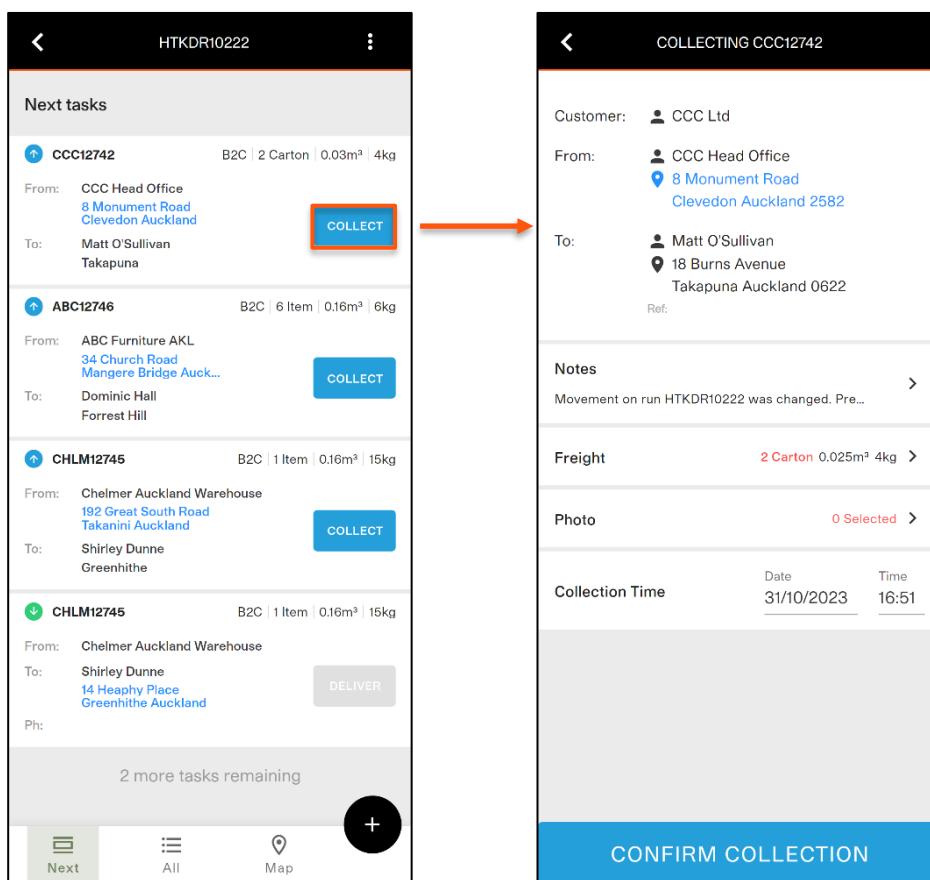Tasks are listed in the order they should be completed.
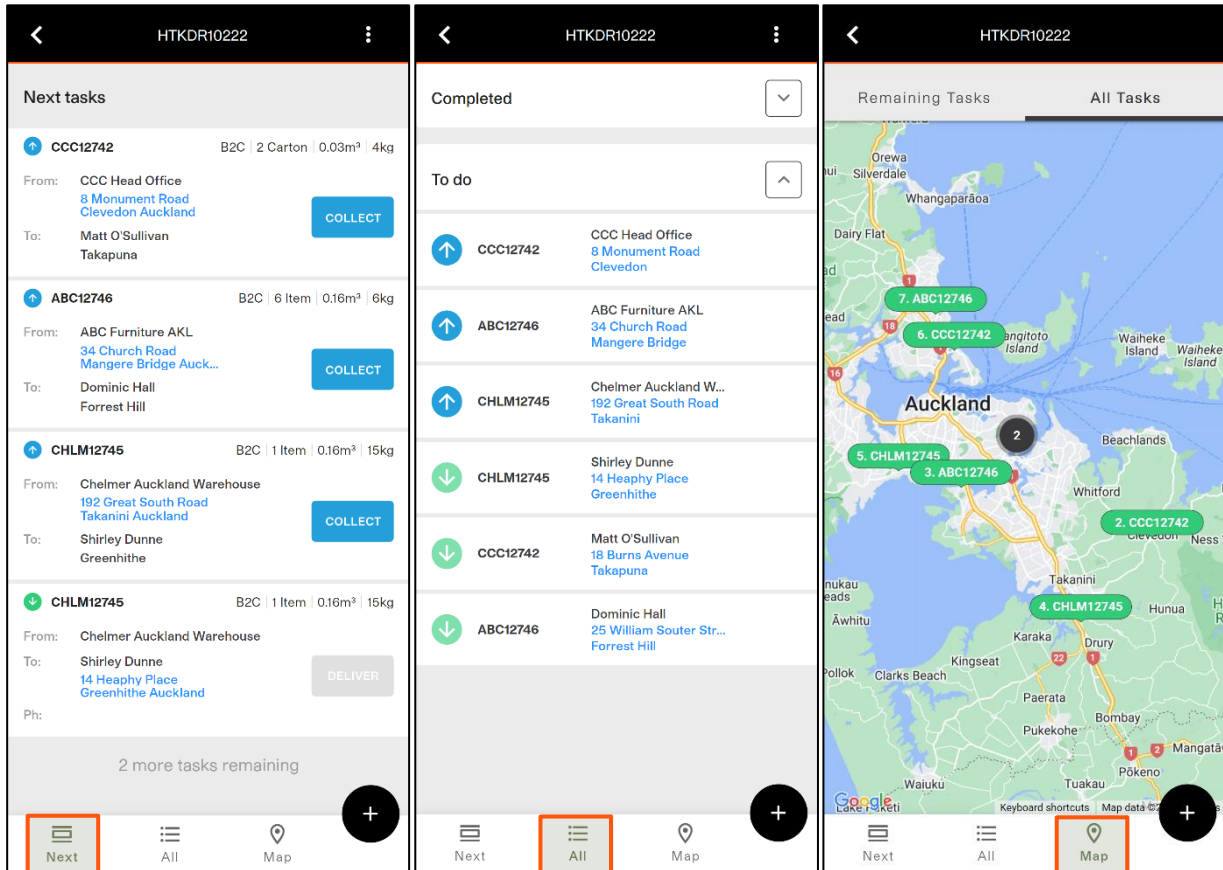
Collections

Collection tasks are used for consignments as they are being picked up:

    a) From the sender

    b) From a hub, for the delivery run to the consignee.

Collections are represented by a blue icon ⬆ and blue action buttons.

- To begin, tap the consignment Collect button.

- Tap the Photo line to add photos of the freight. This can be done directly in the app or by adding the file from the device camera app.

- When the freight has been checked and loaded on to the truck, tap Confirm Collection.
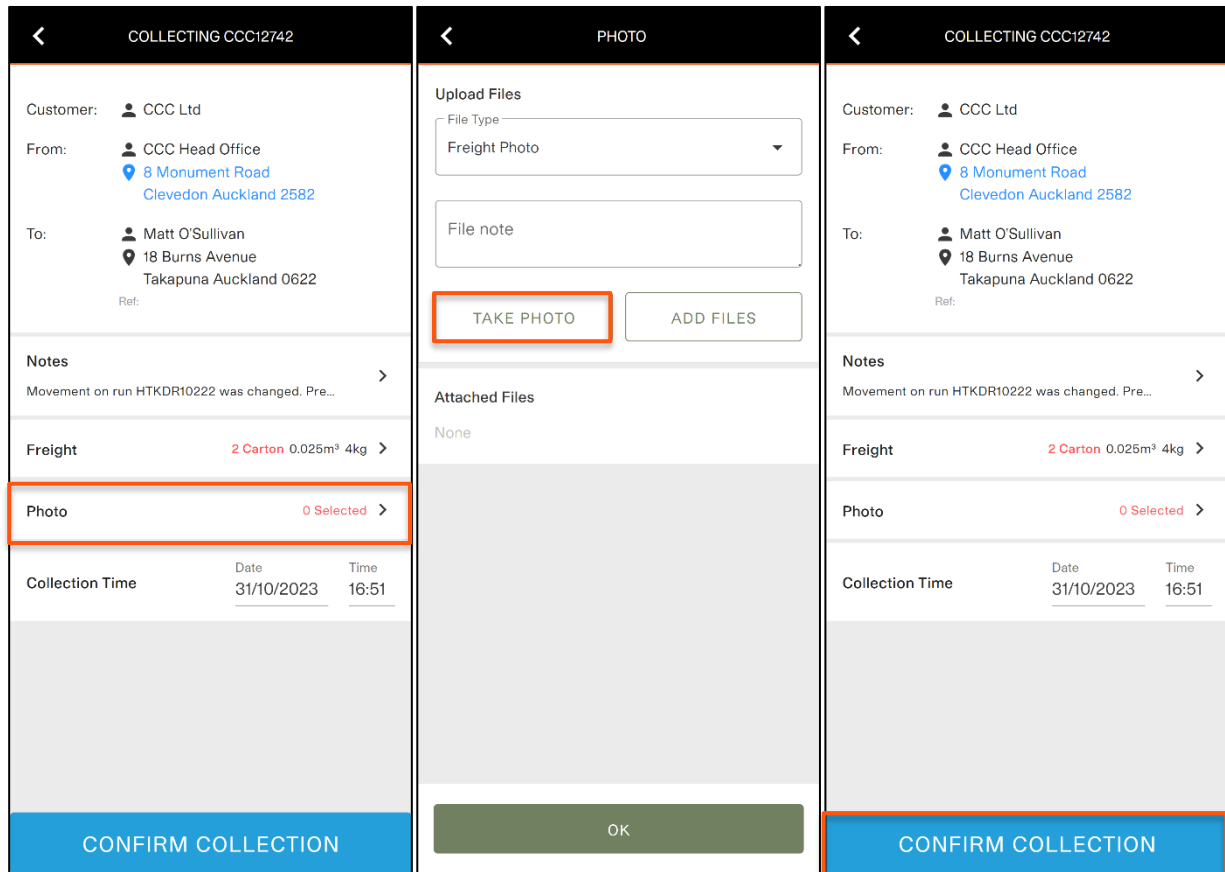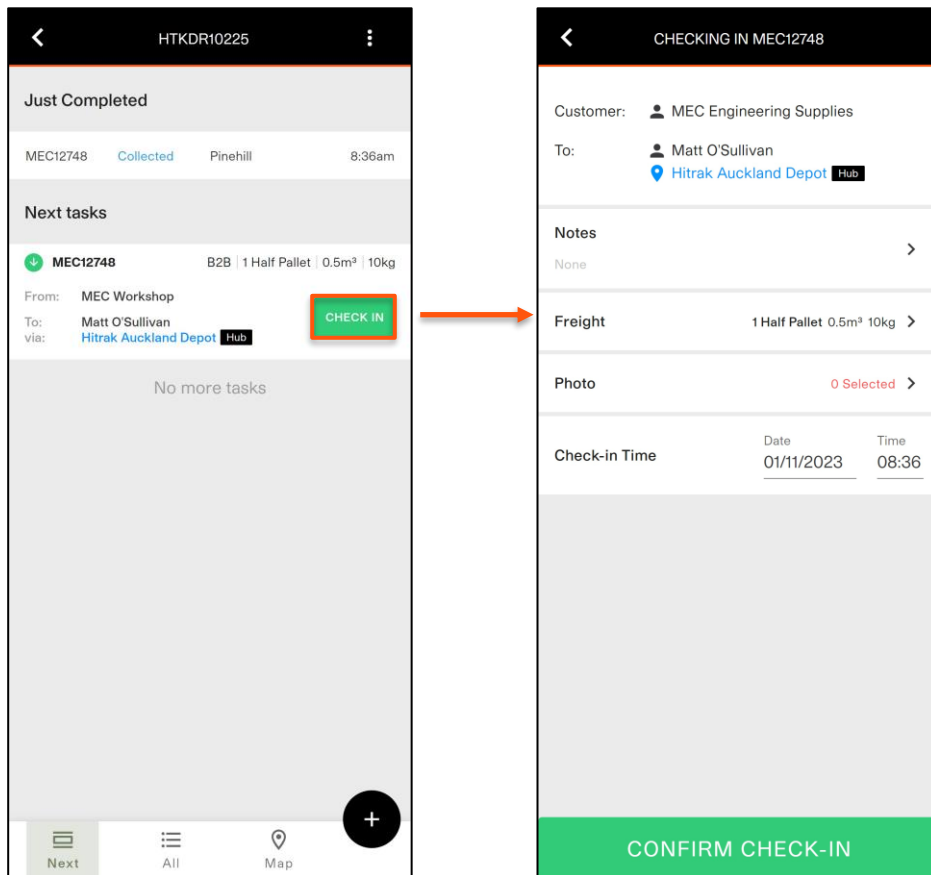
Check-Ins

Consignments going to a freight hub before being delivered to the consignee will require a Check-In task to be completed.

Check-Ins are represented by a green icon ⬇ and green action buttons, plus a Hub icon.

● To begin, tap the consignment Check In button.

- Tap the Photo line to add photos of the freight. This can be done directly in the app or by adding the file from the device camera app.

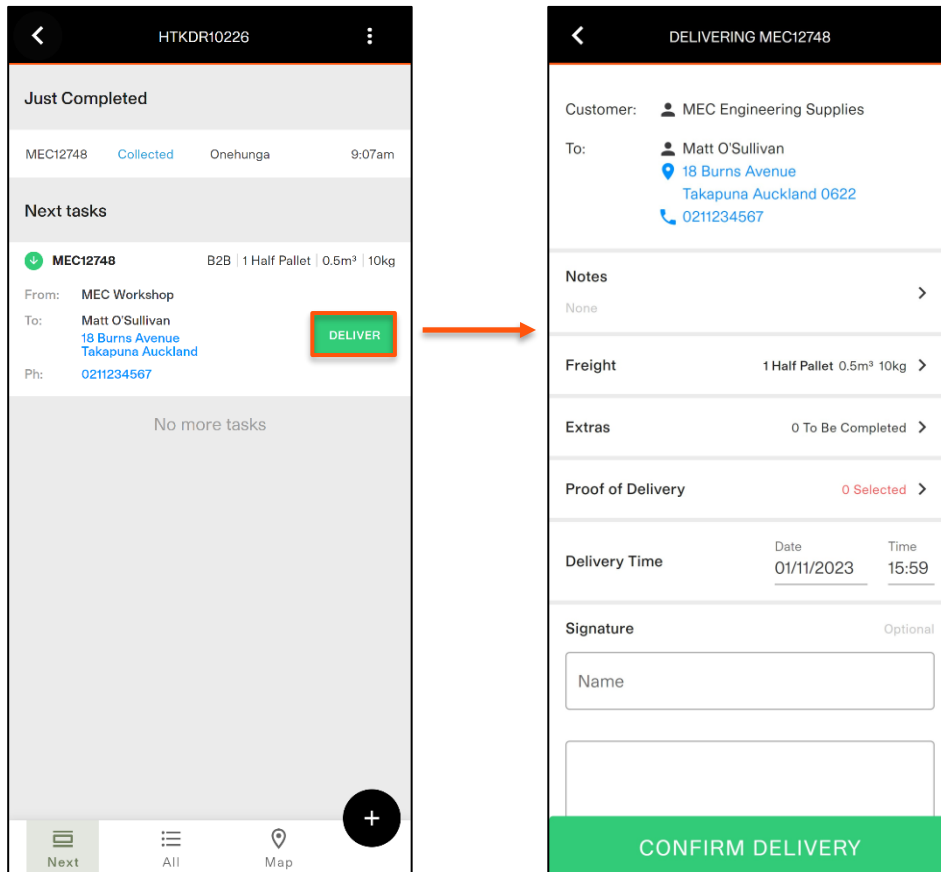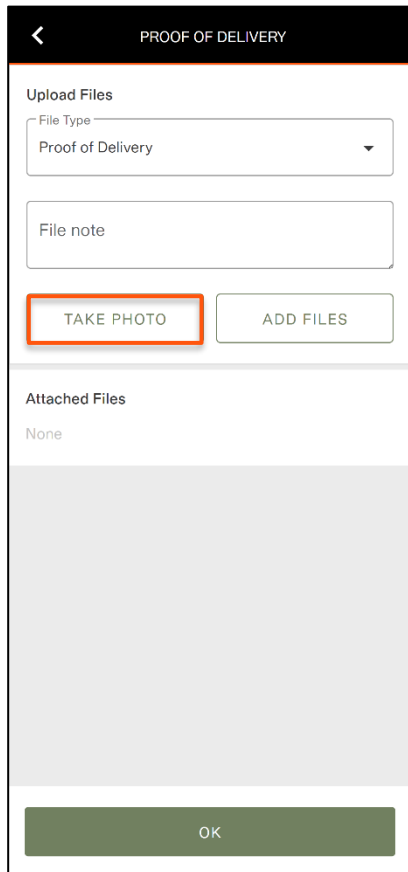- Tap Confirm Check-In to complete the task.
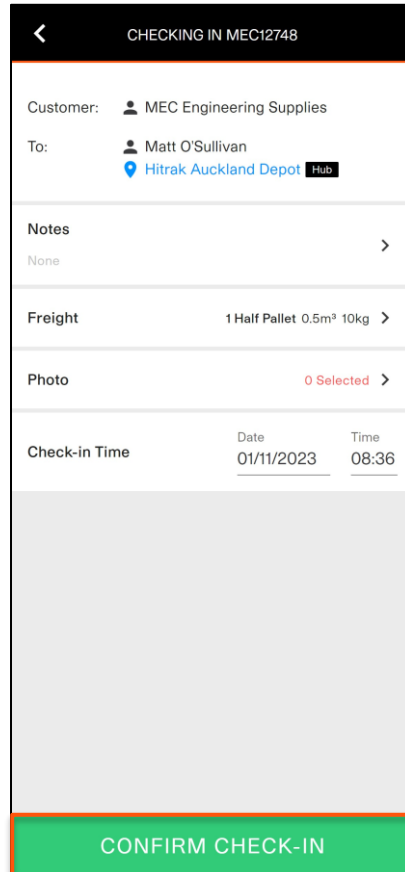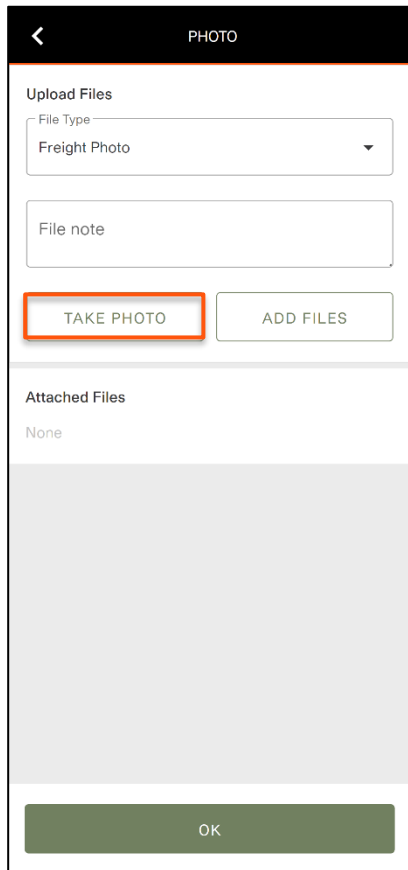
Deliveries

Delivery tasks are used for consignments being delivered to a consignee.

Deliveries are represented by a green icon ⬇ and green action buttons.

- To begin, tap the consignment Deliver button.

- Tap the Proof of Delivery line to add POD photos. This can be done directly in the app or by adding the file from the device camera app.

- Record the consignee's name and signature. These fields are **required** for the delivery to be marked complete.

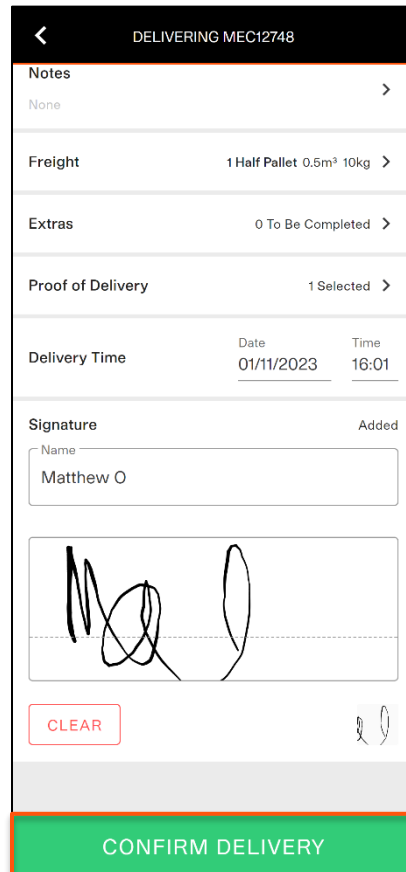- When the consignee has accepted the freight and POD has been captured, tap Confirm Delivery.
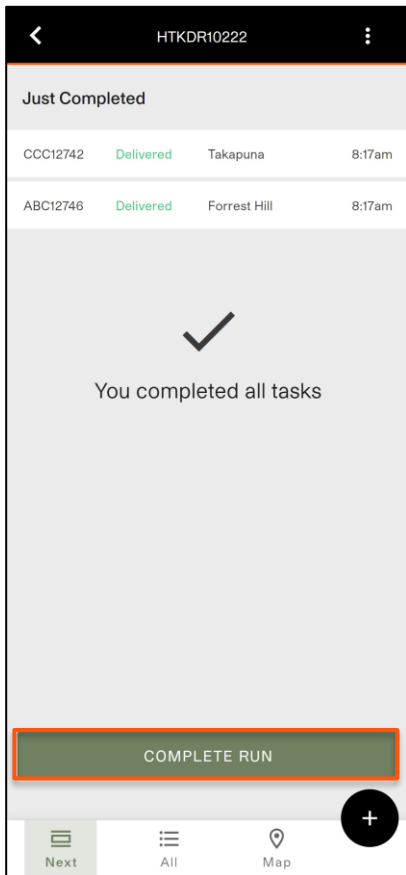
Completing a Run

- When all tasks have been actioned, there will be a prompt to mark the run as complete.

- Tap Complete Run.

- If for some reason the prompt screen was exited before marking the run as complete, the Complete Run command can also be accessed later via the kebab menu ⋮ in the top right corner of the screen.

Detailed User Guide

Home Page

The administration team is responsible for creating driver user accounts within Hitrak. Each user will receive an email with login credentials and a link to the driver application.

Dispatchers create runs for the day, assign these to drivers and offsiders, and may add more tasks to a run while it is in progress.

When a user logs in, they will see all the runs available to them on the Home page.

Runs already completed that day can be viewed, but not changed.

If the user has access to view other drivers' assigned runs, these will also be available here.

The date is set to the current day by default. Users can tap Today to access a calendar and navigate to another date.

Understanding Tasks

Each run task will be one of the following:

⬆️ Collection

⬇️ Check In

⬇️ Delivery

- A consignment must be collected before it can be delivered or checked in. If it hasn't been collected yet, the Deliver or Check In button will be disabled.

- Single consignments at a location will have a consignment reference in the run tasks page. Multiple consignments or tasks at the same location will be grouped, indicated by a number next to the task type instead of a consignment reference.

- Completed tasks are listed at the top of the page, with the consignment reference or task type, suburb and completed time.

- Uncompleted tasks are listed under To do, with the consignment reference (or task type symbol + number), the location and completed time.
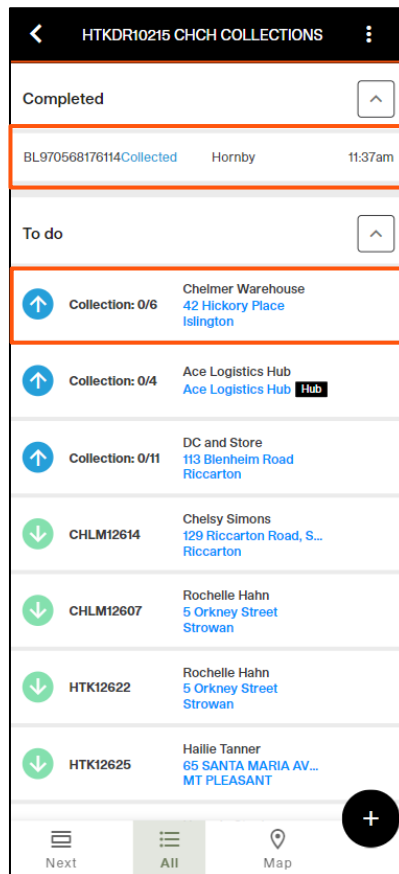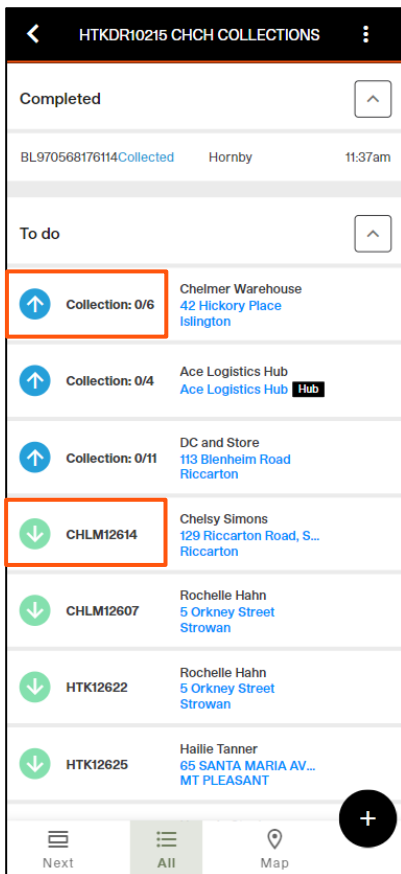
Tap any task to view several tabs containing its full details, including:

- Full address details for the sender and consignee.

- Full freight details for each line item, i.e., the number of items and their descriptions.

- Any Notes added by the sender or consignee.

- Any Endorsements or Notes added by a dispatcher or Driver App user.

- Communication with the consignee about their consignment to date.

- Files attached to the task, e.g., freight photos.

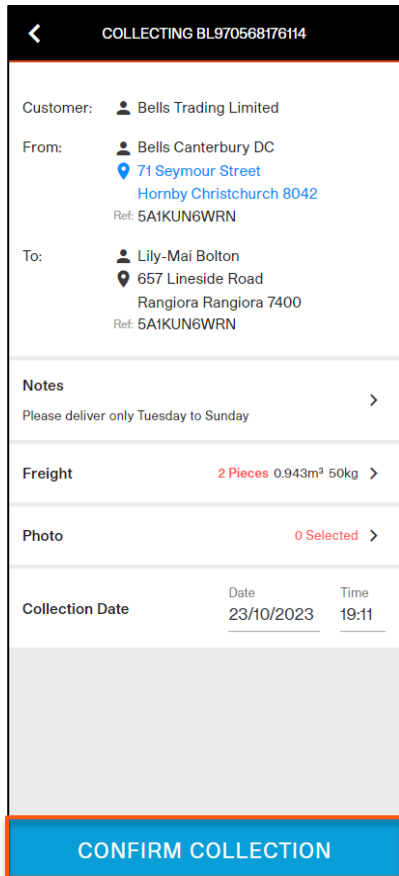- A timeline of the freight's journey to date.
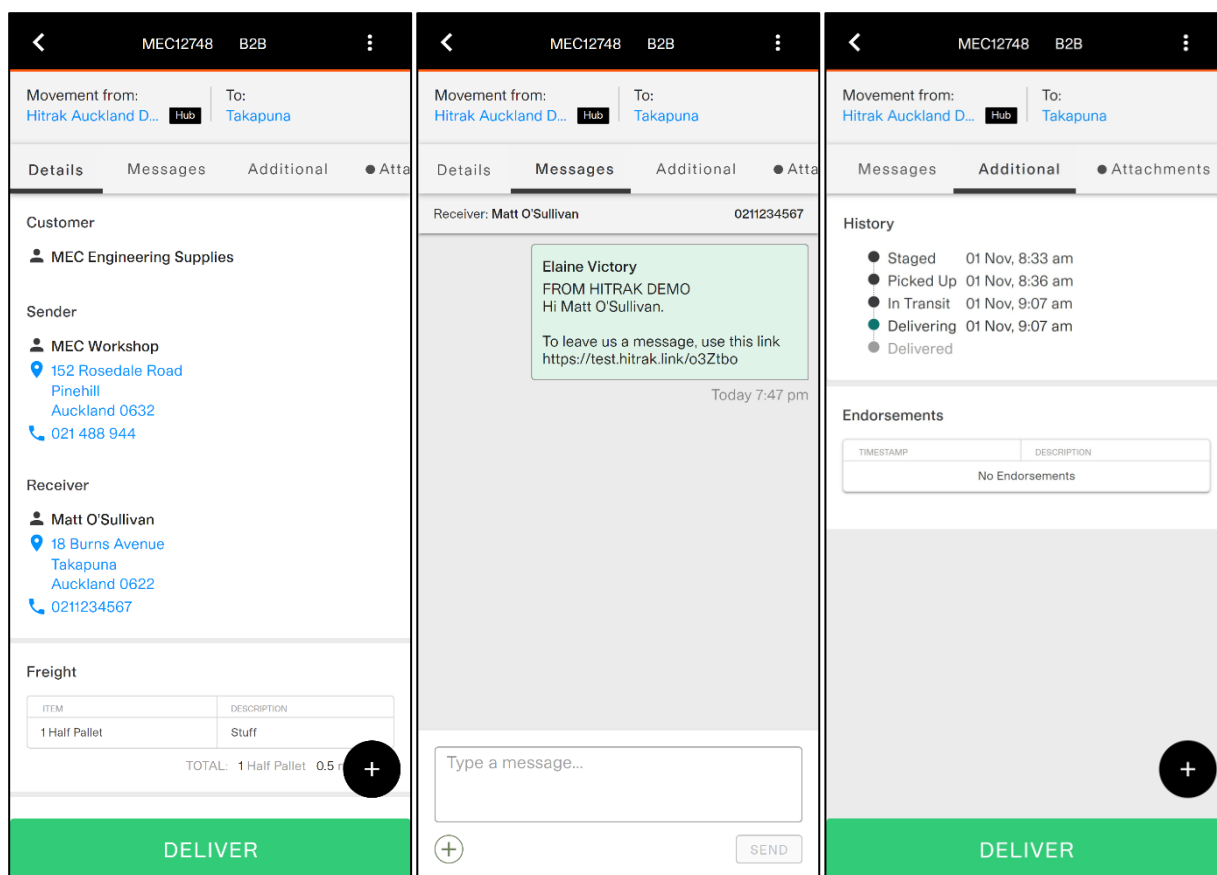
Completing Tasks

There are several pathways available for completing tasks.

Next Tasks tab

- In the Next tab, tap the relevant action button (Collect/Deliver/Check In) to navigate directly to the Confirm page.

- Important actions required or details to check will be highlighted in red, e.g., the quantity of pieces of freight, or photos to be attached.

- Tap the relevant highlighted line to view the details or complete the action required, e.g., uploading a freight photo.
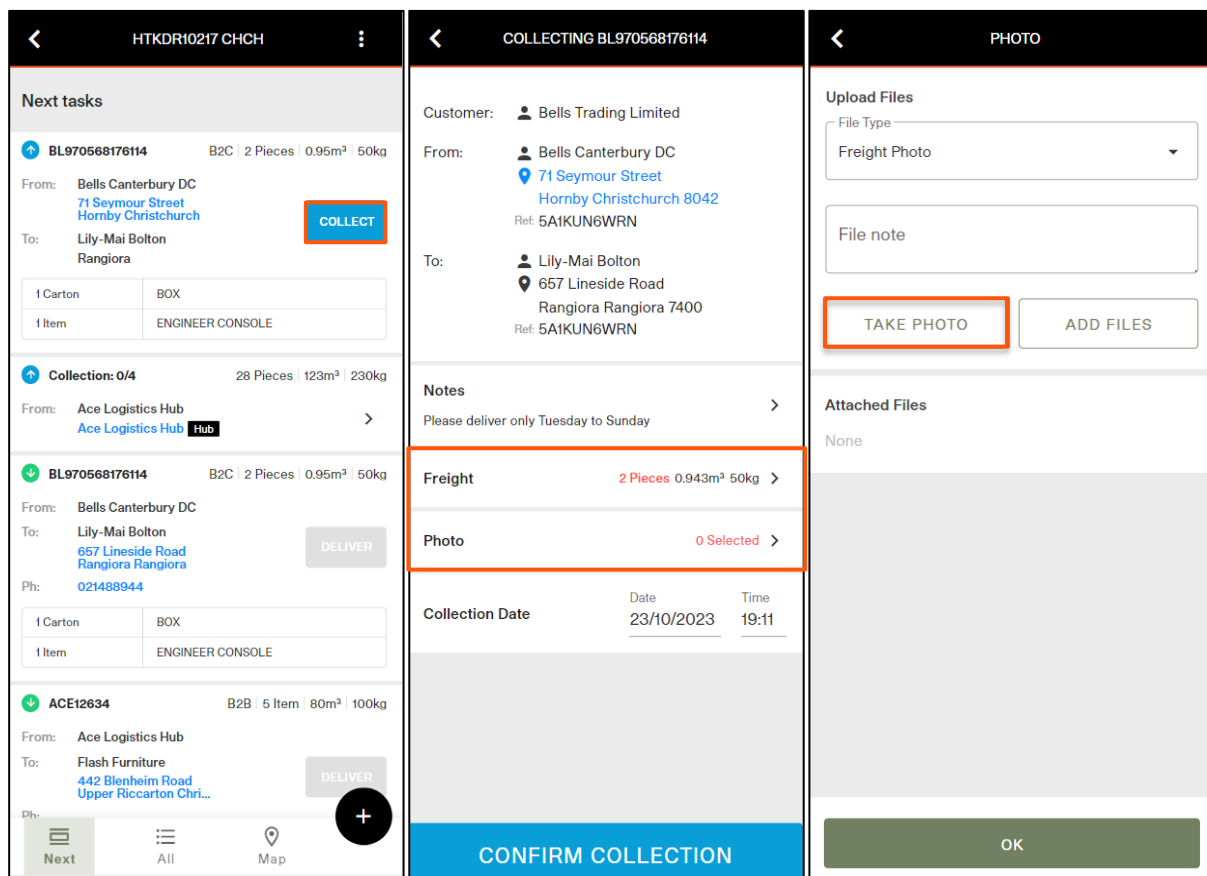
- When the file is attached, tap OK to navigate back to the Confirm page.

- Tap Confirm Collection/Check In/Delivery to complete the task. When a task is completed, the completed date and time will be recorded against the task automatically.

Task details page

- Tap a task to open the details page.

- Tap the **+** button to add photos, <u>Endorsements, Notes, or Exceptions</u>. As above, photos can also be added via the **Confirm** page.
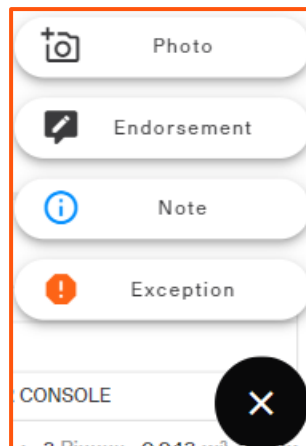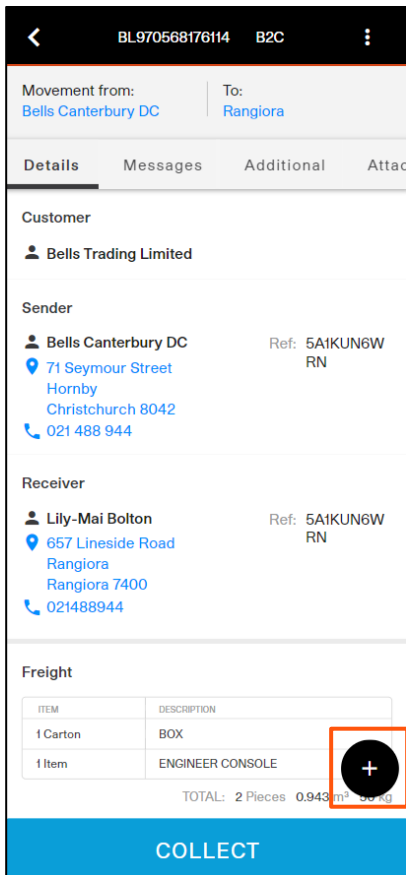
- Tap **Collect**/**Deliver**/**Check In.**

- When the task is complete, tap the **Confirm** button.

Scanning or Manual entry

A consignment can also be collected, checked in or delivered by scanning the label, or entering its reference number manually.

This can be used to add a consignment to a run or find one that is already on a run, e.g., to save scrolling through a long list of consignments.

- Tap the + button on the run page and select either Manual Entry or Scan. If a consignment includes multiple items, only one of the items needs to be scanned or entered to add or find the task. In these cases, it's important to carefully check that the correct number of freight items is being actioned.
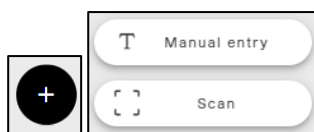
- Scan the square data matrix code on the freight label.

- Alternatively, manually enter the consignment reference, and Tap Go.

- Scanning a consignment will direct straight to the Confirm page, but the full consignment details can be accessed from here if needed.
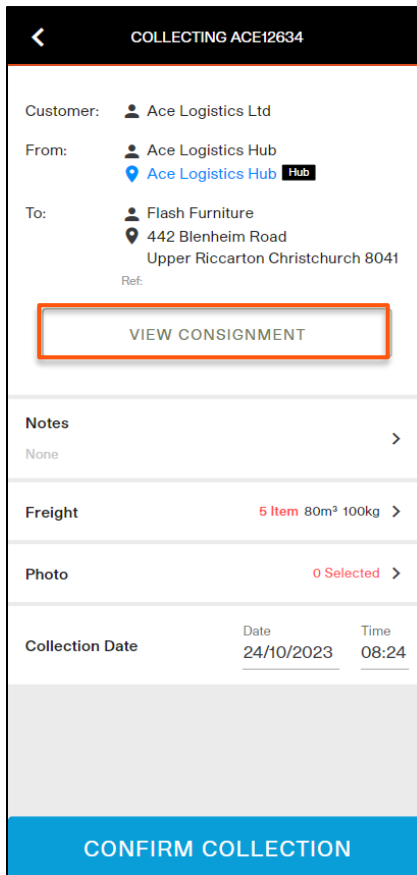
- When the task is complete, tap the Confirm button.

Bulk Actions

Grouped consignments can be checked in, collected, and delivered in bulk. [Notes](#), [Exceptions](#) and photos can be attached to grouped tasks individually or in bulk.

- Tap a run task on the **Next** or **All** tab to view the grouped consignments.

- Select the consignments to be actioned.

- Tap the **+** button to add a note, photo, or Exception to all the selected tasks without navigating from the bulk edit page.

- When the task is complete, tap the action button, then **Confirm** on the next page. If a photo hasn't been added yet, it can be done via this page.
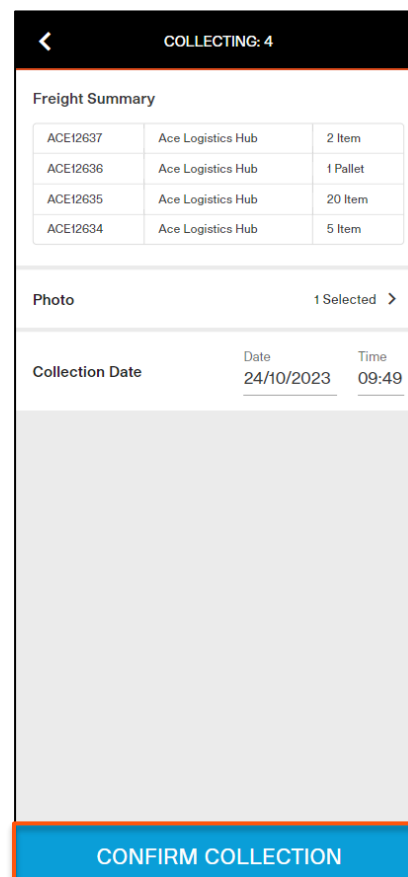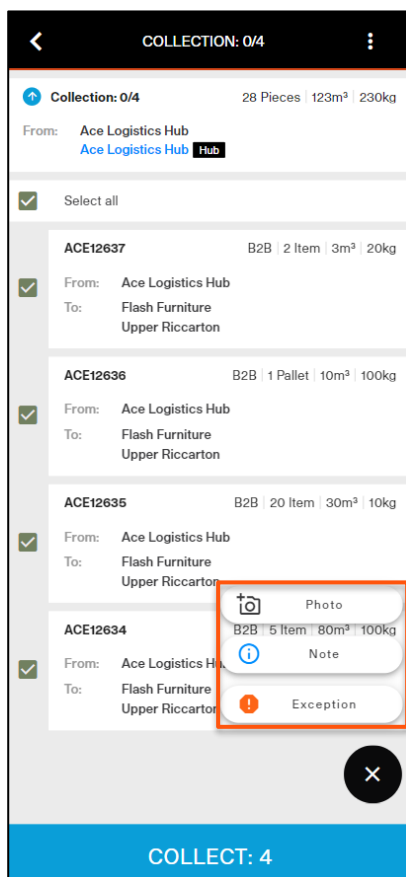
Completing a Run

When all tasks in the run have been actioned and/or [Exceptions](#) have been recorded, the run can be completed.

- Tap the kebab menu on the Next or All tab, then Complete Run.
- If there are incomplete tasks in the run, a warning message will appear before the action can be confirmed.
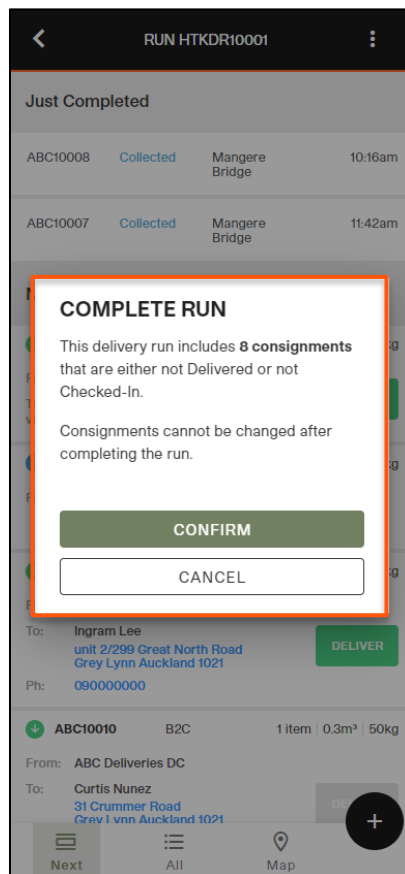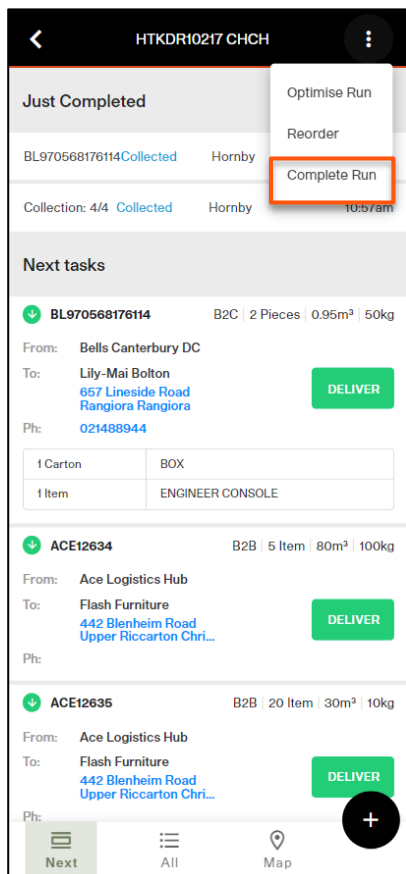
- When the run is ready to complete, tap Confirm.

Additional Task Functions

Exceptions, Notes & Endorsements

Exceptions

Exceptions are used to record any reason a task could not be completed, e.g., if freight was unavailable when a Collection was attempted, or a consignee was unable to receive a delivery.

Each Exception requires a type to be selected from a dropdown list, and a description to be added. To create an Exception:

- Tap the consignment to open the details page.
- Tap the + button, then Exception.
- Select an Exception type and add further detail. Tap Save.
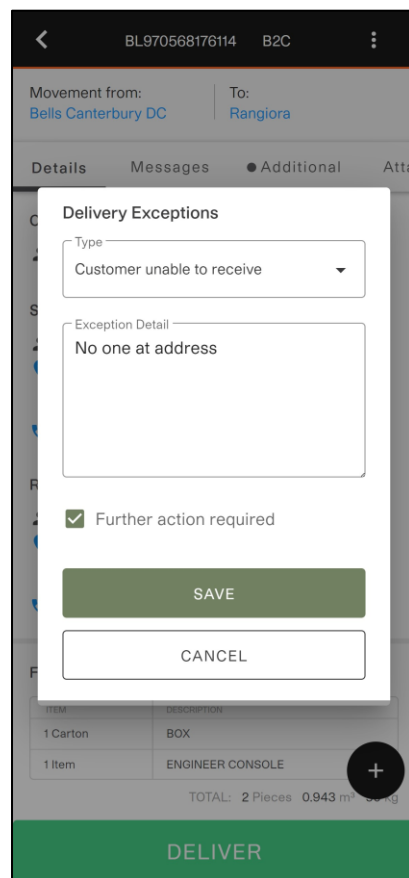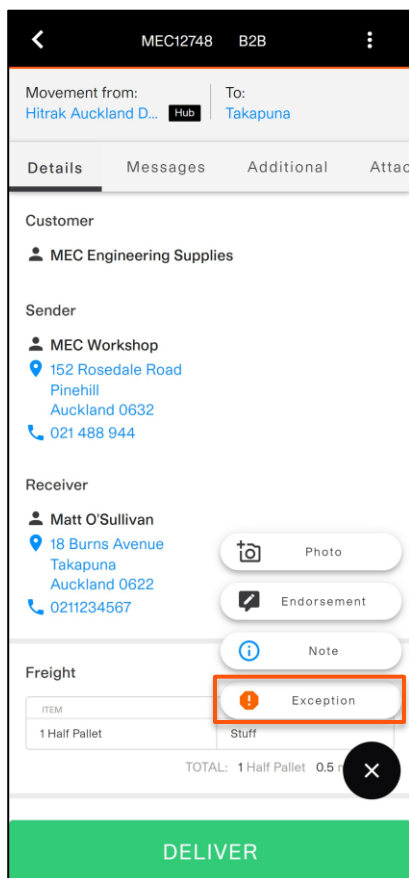
- Until the Exception is resolved, the task will appear with an orange warning icon.
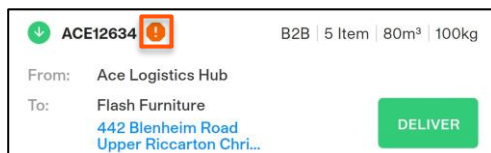
Notes

Notes are intended to record information regarding a task which requires attention or further action but **hasn't** prevented the task from being completed.

Each Note requires a type to be selected from a dropdown list, and a description to be added. To create a Note:

- Tap the consignment to open the details page.
- Tap the **+** button, then Note.
- Select a Note type and add further detail. Tap Save.
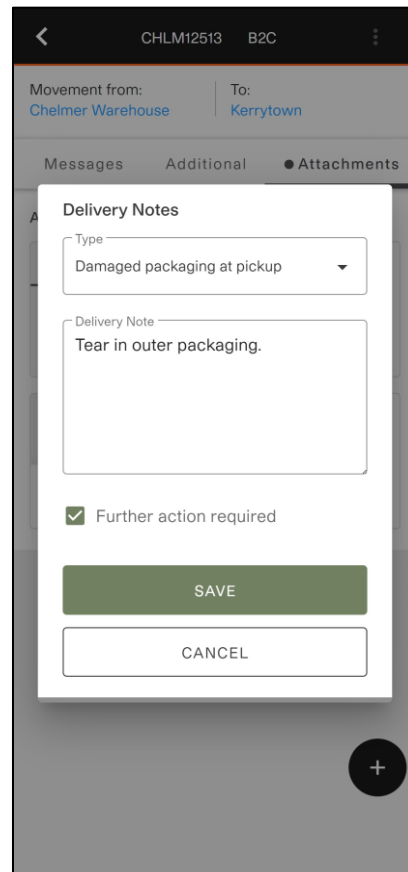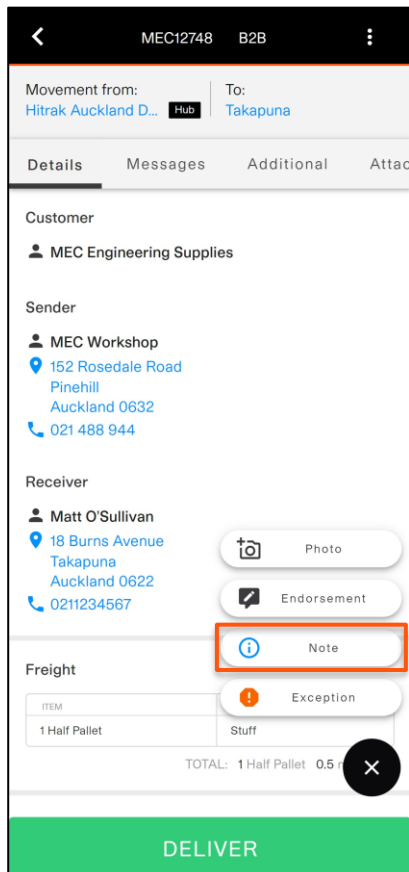
- Until the Note is resolved, the task will appear with a blue information icon.
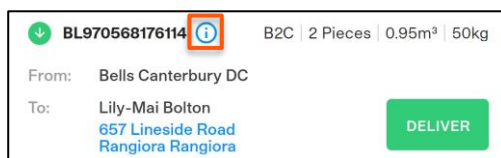
Endorsements

This function can be used to manually add notes for **internal use only.** This is not commonly needed in the Driver app, however, it can be used to record anything of note about a consignment which is either not relevant or not appropriate for a customer or consignee to see, e.g., if a driver caused damage to a piece of freight.

This is a free text field, so no 'type' needs to be selected. Unlike Exceptions and Notes, customers will have no visibility of Endorsements in Freightmaster.

Contacting a Consignee

If a driver needs to get in touch with a consignee while the run is in progress, they can do so by tapping the phone number on the task. This field is available in the Next Tasks tab or the task details page.

- Tap the Call button to dial the consignee's phone number.
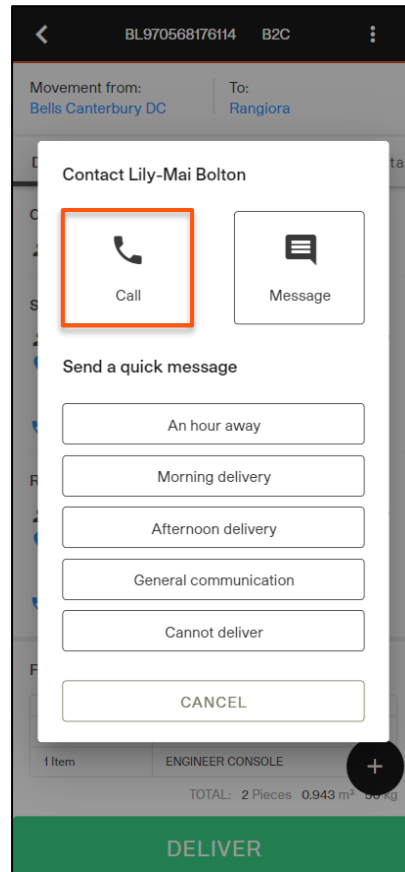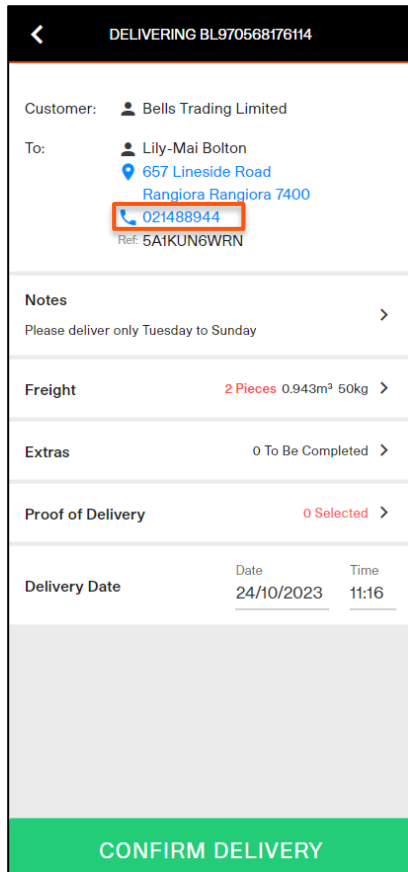
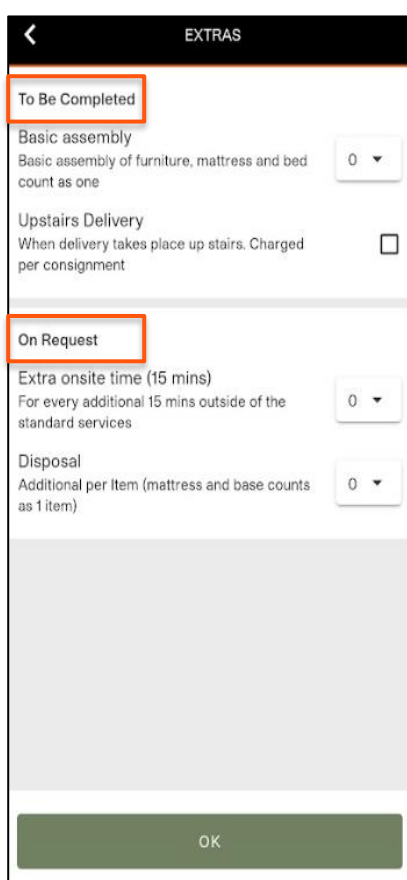If a valid mobile number is available for the consignee, they can also be contacted via text message.

- Select the Message option from the screen above OR tap the Messages tab in the task details page. This tab will also display any previous communication with the consignee.

- Tap + to create a new message. This can be manually typed into the box or using the Quick replies menu to access pre-set message templates.
  Note: Quick replies are recommended, as these will include a link to the consignment in the Hitrak Consumer App. This enables the consignee to track their order and reply to messages.

- When the message is ready, tap Send.
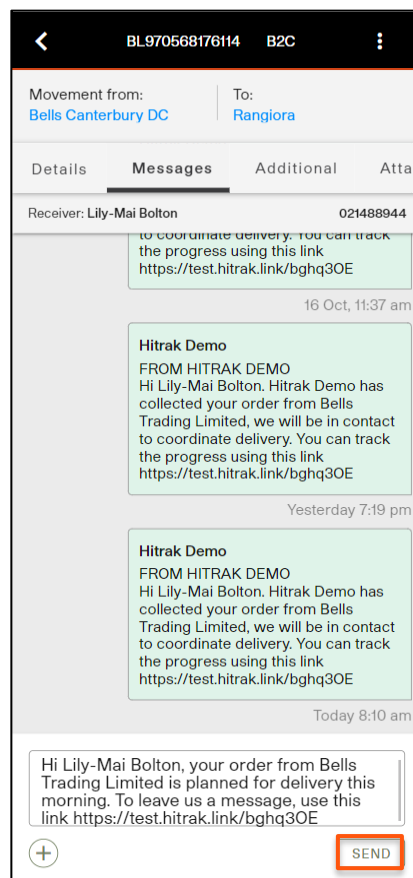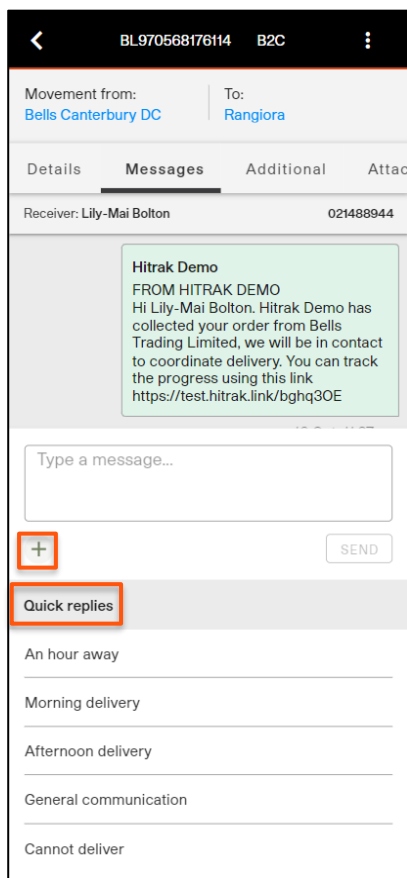
Completing Extras

Depending on the services available, the customer and the freight type, a task may have Extras associated with it, e.g., a B2C delivery where furniture assembly or the removal of rubbish is offered, or where additional time is needed to deliver the item.

- Tap the task details OR the Extras line on the Confirm page to view the associated Extras.

- Extras already purchased by the consignee are listed under To be Completed. Extras which can be added on the fly are listed under On Request.

- Select the quantity or check the relevant box to mark an Extra as completed, then tap OK.

Removing and Redirecting Consignments

If a consignment cannot be collected for some reason, e.g., the freight was not ready at the collection point, it can be removed from a run. *Note: it is strongly recommended to confirm with a dispatcher before removing a consignment from a run.*

- From the task details page, tap the kebab menu ⋮, then Remove from Run.

- Select an Exception reason and more detail on the Exception. *Note: These fields are **required** for all consignment removals.*
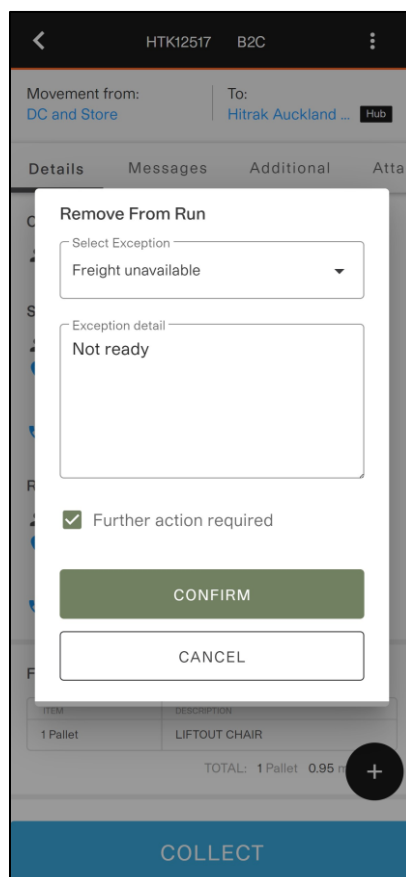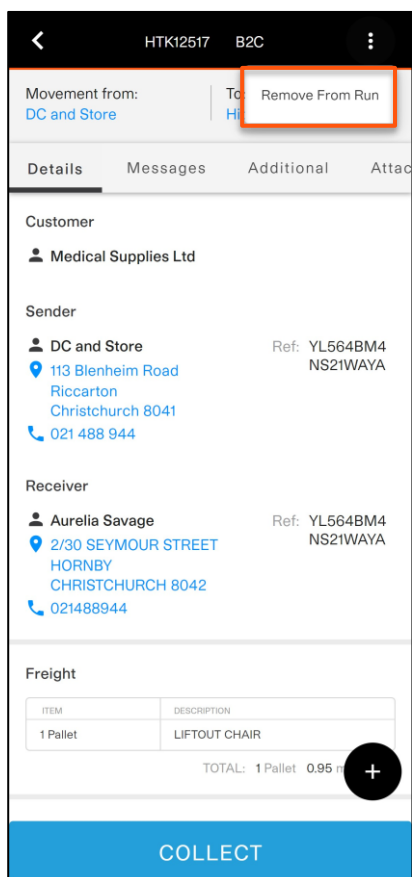
- Tap Confirm to complete the action.

If a consignment has been collected but cannot be delivered to the recipient, it can be redirected back to a hub.

- From the task details page, tap the kebab menu ⋮ , then Redirect to Hub.

- Select the hub for the redirect, an Exception reason, and more detail on the Exception. *Note: These fields are **required** for all redirects.*
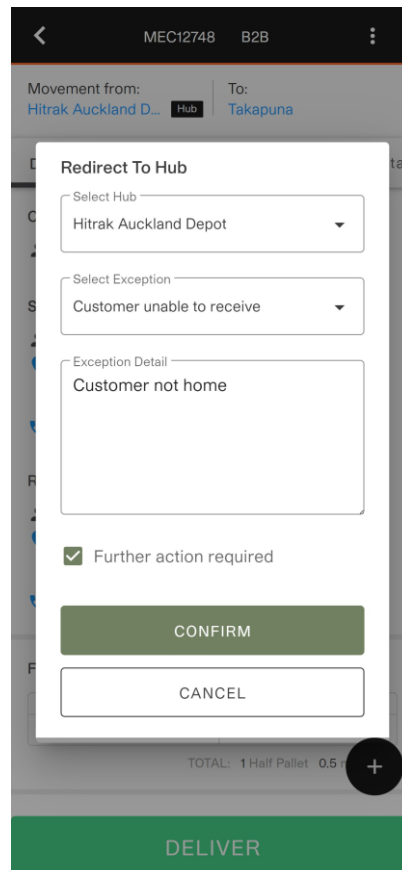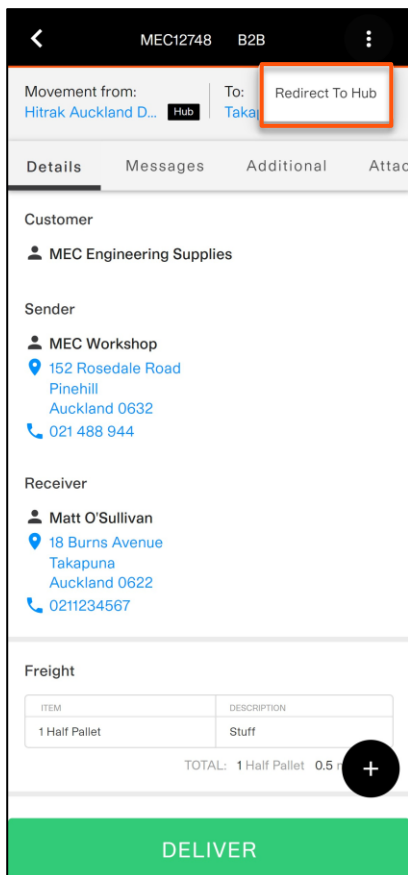
- Tap Confirm to complete the action.

Additional Run Functions

If a route wasn't planned by a dispatcher, or if run tasks have been completed out of sequence for some reason, it can be reordered. There are two options for changing a run route, both of which can be accessed via the kebab menu in the top right corner

Optimising a Run

- To re-order the outstanding tasks automatically in the most efficient sequence, tap **Optimise Run**.

  *Note: this function is generally **not** recommended to use once a run is already in progress.*
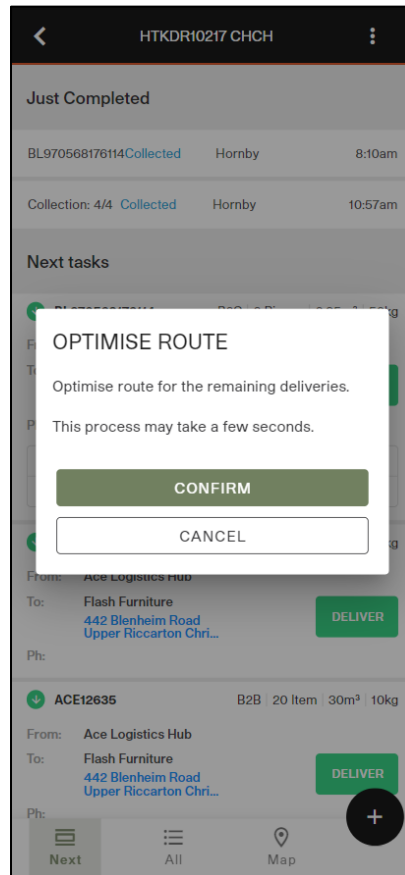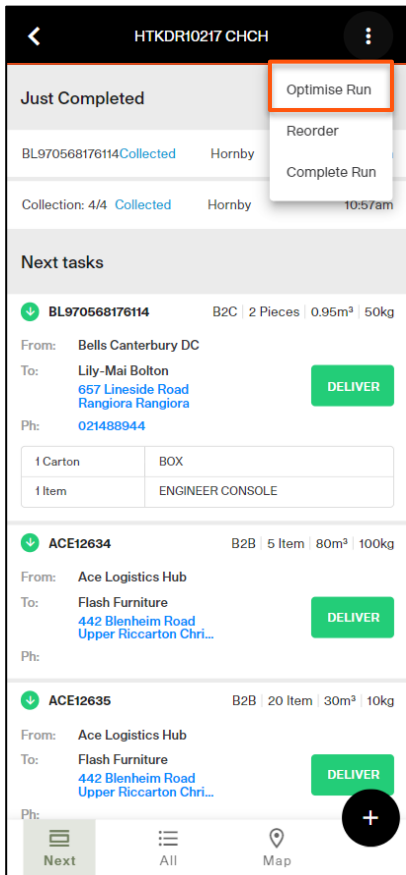
Reordering Tasks

To manually reorder individual tasks, e.g., if a delivery needs to be pushed to later in the day, or if an optimised run isn't the best route for some reason, use the Reorder function.

- Tap the kebab menu, then Reorder.

- Select the task to be reordered and use the arrow buttons at the bottom of the page to move the task up or down in the sequence.

- Tap Save.
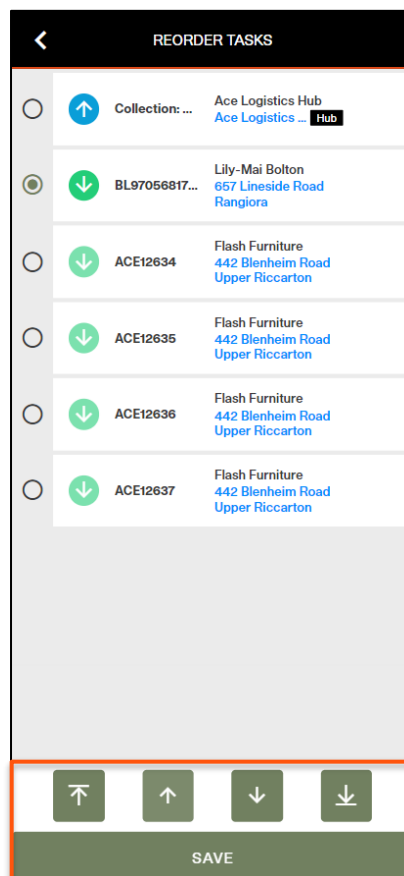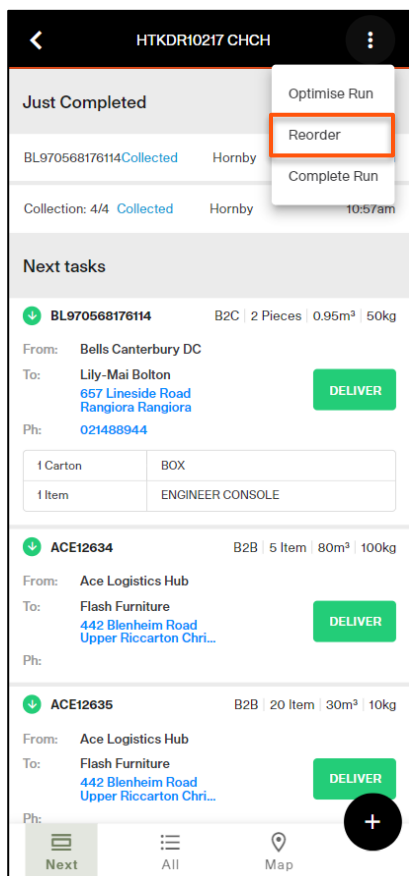
Offline Mode

This allows the user to view consignments and partially access certain functions if there is no internet connection, e.g., in an area with low or no cell phone coverage. Offline mode must be enabled by each user. We recommend this is done on first logging in to the app.

Enabling Offline mode

- On the Home page, tap the hamburger menu to access Settings.
- Tap the Enable offline mode toggle to turn it on.
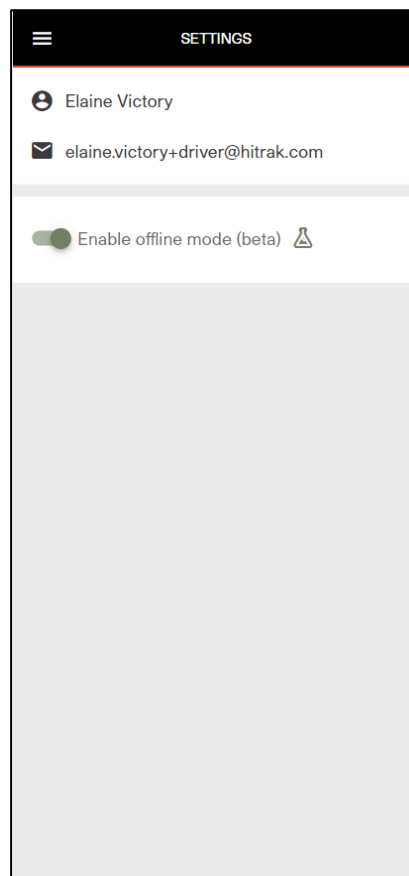
- Once offline mode is turned on, there will be a prompt on returning to the Driver App home page to "Add to Home screen".

- Adding the app to the device's phone home screen will give a full-screen, more app-like experience.

Offline Functions

While offline, a user **can**:

- View consignments and tasks previously viewed while online.

- Access the Confirm page, and add any photos or signatures required for tasks previously viewed while online.
  Note: Photos can also be captured using a device's Camera app and uploaded to the task when back online.

They **cannot**:

- View consignments and tasks not previously viewed while online.

- Receive changes made to a run, such as tasks added or removed by a dispatcher.

- Complete a task.
  - When next online, the user must navigate back to the Confirm page to complete the task. The app will cache any photos or other attachments that were added while offline.

Further Information

For any further information, please contact Hitrak Customer Success, at elaine.victory@hitrak.com.

Change Log

Version	Release Date	Changes	Description
1.1	01/11/23		
1.2	03/11/23	Collections	Task description to include 'collection from hub for delivery run'