Transit Pros Services and Departments

Secondary Towing and Salvage Auction Transport

- Secondary Copart dept. – Coordinates all MD/HD duty units going to Copart salvage auction. These units may have been deemed a total loss by insurance, retired vehicles or even donations and are always in a safe location such as a tow vendors lot, residence, business or a shop.
- Specialty dept. – Coordinates all secondary tows going somewhere other than Copart. *This excludes all ERS designated client moves.

Catastrophic Recovery –

- CAT – A specialized (seasonal) team that coordinates secondary assignments after a natural disaster. This team is seasonal and works closely with our vendors who may come from outside areas to stage for the event.

Vehicle Inspection Service / De-identification Services –

- Inspections dept. – Coordinates vehicle Inspections. Also coordinates the removal of any signage / logos from a vehicle

Mitigation services –

- "Recovery Solutions" – Mitigates vendor bills on behalf of a client – reduces vendor bill and minimizing client's financial loss. This service is most often used by Transit Pros Insurance Co. or Trucking Co. Clients. The vendor bill may be a result of a police rotation dispatch or initiated by the insured/driver. Although an ERS dispatch will never turn to a mitigation, there might be times ERS follows and tracks events that lead to a mitigation. Ex: Specific Trucking Co. Client accident scenes resulting in Police rotation dispatch.

Emergency Roadside Services –

- ERS dept. – Twenty-four-seven department working all emergency events as well as non-emergency events for ERS specific clients. ERS answers, assists and fields after hour calls for all departments. Services include towing, jump start, lockout, fuel delivery, accident scene managment, load shift, rework & transload, tire services and mobile mechanic.

ERS – Department Duties & Responsibilities

ERS will handle all emergency roadside events as well as non-emergency events for "ERS designated clients". Each event is referred to as a "move" and will be initiated by phone or email.

- ➢ Step 1: Intake - Input general information pertaining to the service request including:
  - o Customer name/phone
  - o Vehicle year, make & model
  - o Disablement
  - o Vehicle location
  - o Delivery address
  - o Coverage
- ➢ Step 2: Verify - Verify and gather additional details from the "customer".
  - o Verify all information provided on Step 1
  - o Input full VCR
- ➢ Dispatch
  - o Utilize Transit Pros vendor database and other resources to achieve goal pricing and ETA
  - o Negotiate on ALL vendor quotes
- ➢ Follow up
  - o Keep customer and client updated with service status – ETA, on scene, picked up, completed
  - o Follow up with vendor for status updates as needed
  - o Resolve any issues that may occur after a dispatch – service changes, vendor backouts, service delays/failures, GOA/dry runs, etc.

ERS fields, assists and/or notifies appropriate parties on all non ERS department calls that come into our department

Department	Regular Business Hours	After Hours
Secondary - Copart	1001 - blind transfer	secondarymanagers@transitpros.com
Secondary - Specialty	specialty@transitpros.com	
Vendor Relations - VR	vendors@transitpros.com	
Damage Claims - VR	damage@transitpros.com *(see damage claim protocol)*	
Vendor payments - Accounting	accounting@transitpros.com *(confirm vendor sent invoice)*	
Inspections	1005 - blind transfer	
Mitigations	*See ERS manager	

After Hour Secondary Copart Move Handling

Identify who is calling, move # and reason for call

- ➢ Non-emergencies that can wait until next business day – Note move and email secondarymanagers@transitpros.com Cc: leads@transitpros.com – include caller name, title (vendor, PUL, etc.), callback number and nature of call/request
    - o Ex. Vendor wanting to bid a move, returning call on unscheduled move, vendor requesting additional funds, etc.
- ➢ Emergencies that require immediate attention – Follow ERS on-call protocol.
    - o Ex. Emergency while in tow requiring immediate attention in order to complete the tow.

Tow Equipment

Tow equipment

- ➢ Rollback: standard flatbed
- ➢ Wheel lift / Wrecker: standard tow truck
- ➢ Rotator

Medium Duty Rollback

Typically, no longer than 21-23ft – The entire back of the truck is fitted with a bed that can be hydraulically inclined and slid back to ground level, allowing the vehicle to be placed on it under its own power or pulled on by a winch.

- ❖ Used for passenger vehicles, pickup trucks, some utility trucks, small trailers

Heavy Duty Rollback

Typically, no longer than 23-25ft. The entire back of the truck is fitted with a bed that can be hydraulically inclined and slid back to ground level, allowing the vehicle to be placed on it under its own power or pulled on by a winch.

- ❖ Higher weight capacity than a medium duty rollback
- ❖ Used for heavy service trucks and smaller class B and C motorhomes (depending on height)

Medium Duty Wrecker

Class B Wreckers, for towing vehicles weighing between seven thousand one (7,001) and seventeen thousand (17,000) pounds or multiple vehicles weighing seven (7,000) pounds respectively (medium-sized trucks, road tractors/trailers and similar vehicles).

- ❖ Commonly used for larger service vehicles, box trucks, single axle semi tractors and smaller motor homes / buses

Heavy Duty Wrecker

Class C wreckers for towing vehicles in excess of seventeen thousand pounds (large trucks, road tractor/trailers and similar vehicles)

- ❖ Commonly used for class A motor homes, tandem axle tractors, tractor/trailer combos

Rotator

Heavy duty wrecker equipped with a rotating boom

❖ Commonly used for recovery situations, up righting heavy-duty vehicles and transferring loaded container trailer from one chassis to another.

Special equipment – Hauling trailers

➢ Landoll
➢ Lowboy
➢ Bus trailer

Landoll Trailer

Feature low angle ground loading and can typically haul equipment up to approximately 10'6 tall and approximately 38ft long. The trailer is fitted with a bed that can be hydraulically inclined and slid back to ground level, allowing the vehicle to be placed on it under its own power or pulled on by a winch. A landoll trailer can disconnect from the power unit used to transport it.

❖ Commonly used for non-towable units that are too tall/long for a roll back

Lowboy Trailer

A semi-trailer with two drops in deck height: one right after the gooseneck and one right before the wheels. This allows the deck to be extremely low compared with other trailers. It offers the ability to carry legal loads up to 12 ft. tall and approx. 30 ft. long. There are two types of lowboy trailers:

- ❖ Fixed trailer – will require a heavy-duty wrecker to load unit
- ❖ RGN trailer – 5th wheel attachment end will detach allowing unit to be pulled on trailer by winch line or even driven on in same cases

Bus Trailer

Low profile trailer longer than a lowboy

<u>Other equipment</u>

- ➢ Dollies – Wheel component allowing motion to tow
- ➢ Skid Steer
- ➢ Pallet Jack

Tow dollies

Set of wheels supporting the tow

- ❖ Tow dollies can be used in place of a rollback for smaller vehicles parked in a low clearance location such as parking garages.
- ❖ 5th wheel converter dolly allows a 5th wheel trailer to be towed from the rear – useful when there is axle/tire damage on semi-trailers (empty to lightly loaded)

Skid Steer

A small, rigid-frame, engine-powered machine with lift arms that can attach to a wide variety of buckets and other labor-saving tools or attachments.

Pallet Jack

A tool used to lift and move pallets.

Hitches, Units, Axles & Wheels

Hitches

- Ball hitch
- 5th wheel
- Gooseneck 5th wheel
- Pintle

Ball Hitch

Ball hitch: a device attached to the chassis of a vehicle for towing

Ball hitch coupler: a mechanism that is bolted or welded onto the end of a trailer frame and used to connect trailer to tow vehicles ball hitch.
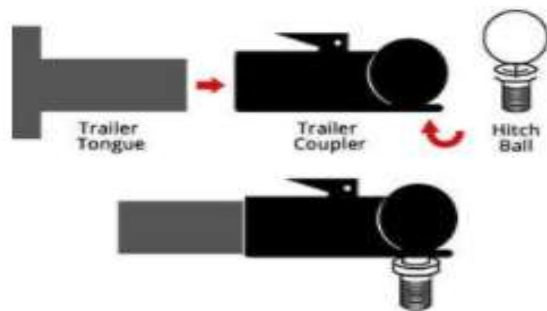
5th Wheel Hitch

5th wheel plate: Trailer hitch with a locking pin to couple with the kingpin of a truck trailer.
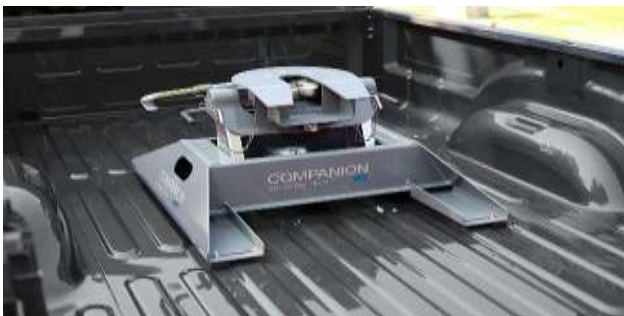
King pin: Trailer connection that locks into a 5th wheel plate.

How it works:
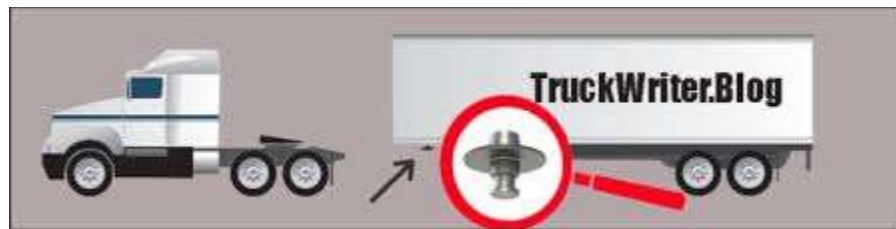
Gooseneck Hitch

Gooseneck Ball Hitch: hitch that mounts into the bed of a pickup truck and provides a simple trailer ball for connecting to a gooseneck trailer.

Gooseneck Coupler: A long arched "neck" designed to clear a pickup trucks tailgate.
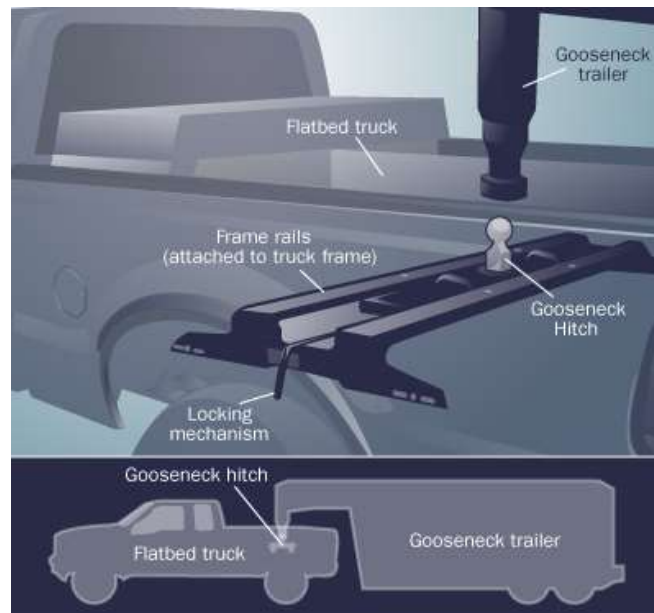
Gooseneck 5th wheel coupler: Conversion attachment allowing gooseneck trailer to couple with a 5th wheel hitch plate than a gooseneck ball hitch.

Pintle Hitch

Swivel hitches for off road applications.

Latch →
Mounting Plate ↓
Body or Hook ↓
Safety Pin →

Units

Unit Categories

- ➢ Service Trucks – Used to provide a service or repair
- ➢ Truck Tractor (Semi truck) – Used to transport semi-trailers
- ➢ Semi-Trailers – Used to transport equipment or goods
- ➢ Other Trailers – Include travel trailers, horse trailer, toy hauler, enclosed cargo trailer, some car dollies
  - o 5th wheel
  - o Gooseneck
  - o Ball Hitch
- ➢ Motorhome – Recreational vehicle, typically equipped with living quarters
- ➢ Bus – A large motor vehicle equipped to transport multiple passengers
- ➢ Box truck – Commercial vehicle used to transport equipment or good. The box is fixed to the cab/chassis
- ➢ Passenger vehicle – Standard vehicle used for commuting

Service Trucks

Utility Truck – Equipped with toolboxes built into the truck bed. May have a latter rack or boom.

Flatbed Truck – Flatbed is fixed to cab/chassis

Dump Truck – Body tilts back or to the side for unloading.

Garbage Truck – Used to collect and dispose of garbage

Tanker Truck – Used to carry liquid or gas. Tank is fixed to the cab/chassis.

Emergency Vehicles – Used by emergency services
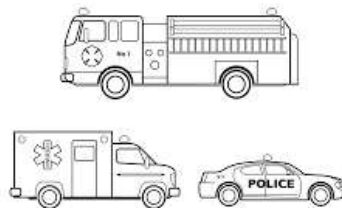
Truck Tractors

Day Cab – No sleeping quarters

Sleeper Cab – Equipped with sleeping quarters

Semi-Trailers

Dry Van – Fully enclosed to protect shipments from outside elements – not temperature controlled. Designed to carry boxes, pallets and loose freight.

Reefer – Insulated and tightly sealed enclosed trailer equipped with a refrigeration unit mounted on the front outside wall to control the temperature inside the trailer.

Flatbed Trailer – Open deck trailer with no roof or sides. Often used for "oversized" loads.

Container Trailer – Containers are used to ship freight via rail or ships. A container is then mounted to an intermodal chassis for over the road transportation.

Other Trailers

Travel Trailer – Typically equipped with living quarters. My or may not be equipped with slide outs.

Horse Trailer – used to transport horses and other livestock.

Toy Hauler – A travel trailer featuring a "garage" in the rear with a ramp-door for access.

Enclosed Cargo Trailer –Typically equipped with a ramp to loading/unloading and a door for access.

Car dolly – A two-wheel trailer that will lift only the front wheels of a passenger vehicle for towing.

Motorhomes

Class A Motorhome <u>front engine</u> – Recreational vehicle typically equipped with living quarters and may or may not have slide outs. The frame is built on commercial bus or truck chassis. Engine is in the front ("puller")

Class A Diesel Pusher Motorhome <u>rear engine</u> – Class A motorhome with engine in the rear.

Class B – Aka "camper van", built using an automotive van.

Class C – Recreational vehicle build on a can frame or truck chassis with an extension over the cab.

Bus

A large motor vehicle equipped to transport multiple passengers. Like motorhomes, buses are built on a variety of chassis ranging from a van or bus chassis to a rear engine commercial chassis.

Box Trucks

Commercial vehicle used to transport equipment or good. The box is fixed to the cab/chassis

Passenger Vehicles

Pick-up truck – cab and bed size vary

SUV – Sports utility vehicle

Standard Car

Axles

Referring to rear axles

- ➢ Single – One rear axle
- ➢ Tandem – Tow rear axles
- ➢ Tri – Three rear axles
- ➢ Tag – Provides increased weight-carrying capacity by supporting the chassis at the rear.

Single Axle

Tandem Axle

Tri Axle
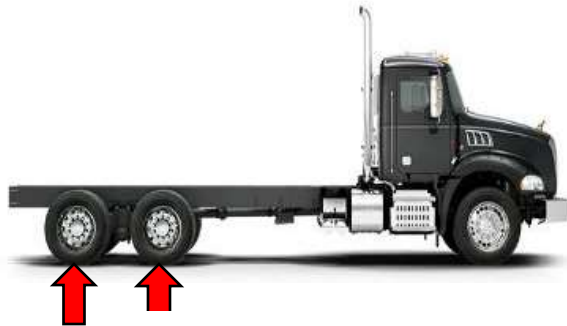
Tag Axle

Commercial Vehicle Axles

Steer Axle   Drive Axles   Trailer Axles
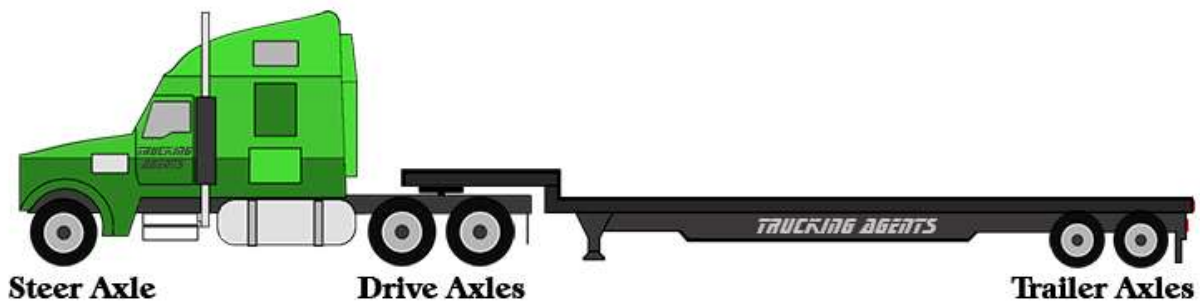
Wheels

Referring to rear wheels

> ➢ Single – one wheel on each side of rear axle
> ➢ Dually – two wheels on each side of rear axle

Single Wheel

Dual Wheel – "Dually"

Weight Class

Unit weight class directly corresponds with the unit dimensions/weight and does not necessarily match the type of tow equipment needed. Examples:

- A light duty rollback may be used for a "medium duty" pickup truck
- A medium duty wrecker may be used for certain "heavy-duty" vehicles

➤ Light Duty
➤ Medium Duty
➤ Heavy Duty
➤ Diesel Pusher

Standard Auto Weight Class

Standard Auto Weight Class	GVW
Light Duty	Under 11,000 lbs.
Medium Duty	11,000 – 26,000 lbs.
Heavy Duty	Over 26,000 lbs.

RV Weight Class

RV Weight Class	Length
Medium Duty	Up to 30' long
Heavy Duty	31' and longer
Diesel Pusher	ALL rear engine

Mapping

Highway Introduction

A highway is a main road intended for travel by the public between important destinations, such as cities and towns. Highway designs vary widely and can range from a two-lane road without margins to a multi-lane, grade separated freeway. An interconnected set of highways can be referred to as a "freeway", an "expressway" or a "parkway". Also known as the Dwight D. Eisenhower National System of Interstate and Defense Highways, Interstate highways receive substantial funding from the federal government and must comply with federal design standards. However, they are owned and operated by the states or toll authorities.

The united States has the world's largest network of highways. During this presentation, we will discuss the Interstate Highway and United States Numbered Highway Systems. You will discover the characteristics inherent in both in order to provide members with roadside assistance when they are located in these locations

United Stated Highways

East to West highways are named based upon the percentage of the country's population that lived south of the particular interstate.

- ❖ Example: I-10 – 10% of country's population lived south of I-10 at the time the highway was named.

North to South highways are named based upon the percentage of the country's population that lived west of the particular interstate.

- ❖ Example: I-95 – 95% of country's population lived west of I-95 at the time the highway was named.

Note how the numbers gradually get larger from South to North and from West to East

Interstate Highways – Numbering

The system of **United States Numbered Highways** (often called **U.S. Routes** or **U.S. Highways**) is an integrated system of roads and highways in the United States numbered within a nationwide grid.

East-West interstates are assigned an even number.
Interstates: I-10, I-40, I-70, I-80, I-90

North-South interstates are assigned an odd number
Interstates: I-5, I-15, I-25, I-35, I-55, I-75, I-95

Auxiliary interstate highways are given three digits which consist of a single digit prefixed to a two digit number of a nearby primary interstate. These types of highways typically serve urban areas.

Alaska has few road connections compared to the rest of the U.S. The state's road system covers a relatively small area of the state, linking the central population centers and the Alaska Highway, the principal route out of the state through Canada. The state capital, Juneau, is not accessible by road, only a car ferry. The western part of Alaska has no road system connecting the communities with the rest of Alaska.

Different Types of Highway Shields

Highways in the United States are split into at least four different types of systems.

❖ Interstate Highways: are all constructed to precise standards, designed to maximize high-speed travel safety and efficiency. Interstate Highways also contain auxiliary routes, which are normally assigned a three-digit route number.

❖ US Highways: is an older system, coordinated by the American Association of State Highway and Transportation Officials and maintained by state and local governments

❖ State Highways: are of varying standards and quality. Some state highways become so heavily traveled they are built to Interstate standards; others are so lightly traveled they are roads of minimal quality.

❖ County Highways: The final administrative level in some states is the county-maintained county highway. County routes vary widely from well-travelled expressways to dirt access roads into remote parts of the county.

Highways are generally organized by a route number or letter. These designations are generally displayed along the route by means of a highway shield; each system has its own unique shield design that will allow quick identification to which system the route belongs. Below is a list of the different highway shields used throughout the U.S.

Interstate Highways **95** Interstate Highway **695** Interstate Highway, 3-digit variant **80** Interstate Highway, state-name variant **A1** Alaska Interstate Highway **PR11** Puerto Rico Interstate Highway **96** Business Loop Highway **75** Business Spur Highway	❖ **Looking at this shield you will notice the numbered interstate** ❖ **Looking at this shield you will notice the numbered interstate with 3 digits** ❖ **Looking at this shield you will notice the name of the state printed on the shield** ❖ **Looking at this shield you will notice the name of the state printed on the shield. Alaska will also have an A in front if the number indicating they are on Alaska** ❖ **Looking at this shield you will notice in Puerto Rico "PR" will always be in front of the digit. Indicating they are in Puerto Rico.** ❖ **Looking at these two shields you will notice the routes are signed with green shields resembling the Interstate Highway shield. The word BUSINESS is used instead of INTERSTATE, and, above the number, where the state name is sometimes included; the word LOOP or SPUR appears. A business loop has both ends as its "parent", while a business spur has a "dangling end", sometimes running from the end of the Interstate to the downtown area**

U.S. Numbered Highways

United States Numbered Highways — This shield is used as a marker in the United States Highway to indicate Routes.

United States Numbered Highways, California — This shield is used as a marker in the United States Highway to indicate Routes and "US" is added indicating it's part of the US highway system.

Suffixed United States Numbered Highways — This shield is used as a marker in the United States Highway. The "E" indicates the eastern branch of US 25.

Historic United States Numbered Highways — This shield is indicating a historic route. Route 66 is on the most famous routes in the US today.

Scenic Route — This shield is indicating a specially designated road or waterway that travels through an area of natural or cultural beauty.

Business Route — This shield is a short special route connected to a *parent* numbered highway at its beginning, then routed through the central business district of a nearby city or town, and finally reconnecting with the same *parent* numbered highway again at its end.

Bypass Route — This shield is a road or highway that avoids or "bypasses" a built-up area, town, or village, to let through traffic flow without interference from local traffic, to reduce congestion in the built-up area, and to improve road safety.

Business Route, Maryland variant — This shield is a short special route connected to a *parent* numbered highway at its beginning, then routed through the central business district of a nearby city or town, and finally reconnecting with the same *parent* numbered highway again at its end. The green shield resembles the US Highway shield.

Generic routes

 Generic county route   This shield is a road in the United States that is designated and/or maintained by the county highway department.

 Generic county route   This shield is a road in the United States that is designated and/or maintained by the county highway department.

 Generic Forest Route   This shield is built to connect the national forests to the existing state highway systems, and to provide improved access to recreational and logging areas

 Generic Indian Route   This shield is a type of minor numbered road in the southwest United States found on certain Indian reservations. The routes are signed by shields featuring a downward-pointing arrowhead with varying designs depending on the state and/or reservation.

 Generic U.S. Bicycle Route   The United States Numbered Bicycle Routes is an integrated system of regional bicycle routes in the United States. It is the bicycle route equivalent to the system of United States Numbered Highways.

Territorial Highways

 Puerto Rico Primary Highway   The highway system in Puerto Rico is divided into four different classes: the Primary Network, the Urban Primary Network, the Secondary Network, and the Tertiary Network. Highways may change between networks and retain their same numbers.

 Puerto Rico Urban Primary Highway   The highway system in Puerto Rico is divided into four different classes: the Primary Network, the Urban Primary Network, the Secondary Network, and the Tertiary Network. Highways may change between networks and retain their same numbers.

 Puerto Rico Secondary Highway   The highway system in Puerto Rico is divided into four different classes: the Primary Network, the Urban Primary Network, the Secondary Network, and the Tertiary Network. Highways may change between networks and retain their same numbers.

 Puerto Rico Tertiary Highway   The highway system in Puerto Rico is divided into four different classes: the Primary Network, the Urban Primary Network, the Secondary Network, and the Tertiary Network. Highways may change between networks and retain their same numbers.

 U.S. Virgin Islands Highway   US Virgin Islands code places responsibility for highways in the territory to the territorial department of public works.

In this section you will notice the shields have been tailored to represent the states flower, the actual shape of the state or anything particular for that state.

67	State Routes in Alabama	**62**	State Highways in Colorado
13	State Roads in Florida	**1** WASHINGTON	Primary State Highways in Washington
462	State Highway in South Carolina	Bronx River Pkwy	Parkway in New York City and Upstate New York
3	State Route in Georgia	**2** ROAD	Recreational Road in Texas
ALASKA ★ **5**	Alaska Routes	VERMONT **15**	Vermont Route

Auxiliary Routes
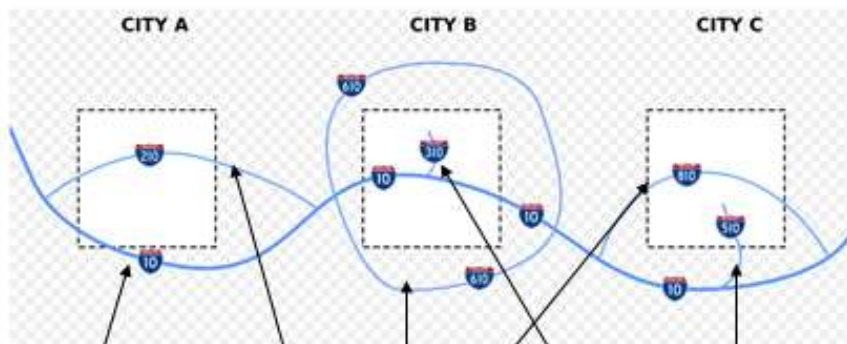
Mainline Interstate
A highway serving two or more states.

Notice that I-10 is the main highway as it travels through these 3 cities.

Beltway or Bypass Route
A highway around the perimeter of an urban area.

Notice that I-610 travels around city B. It will usually have an even number as the first digit.

Spur Route
A short road forming a branch from a longer, more important route (typically a major road, freeway, Interstate Highway or motorway). A bypass or beltway is never considered a true spur route as it typically reconnects with the major road.

Notice that I-510 and I-310 begin at I-10 and terminate within the city limits. Spur routes will usually have an odd number as the first digit.

Exit Numbers and Mile Markers

A mile marker is a series of numbered markers, occurring every ___, placed along a highway or other roadway. Most mile markers and exits are numbered according to the nearest mile marker.

In Google Maps, exit numbers will be assigned green place markers containing the respective exit number. Typically, they will correspond to the mile marker on the roadway.

If a member states they are on I-20 E at mile marker 45, the most probable location for this member on the map is in the middle of MM 44 and MM 46.

Finding Interstates and Mile Markers

One important piece of information to remember is that all Interstates and Mile Markers follow the same general rule. Small number to the South and West, large numbers to the North and East.

Mile Markers and Interstates start with small number in the south and get larger as you travel north.

Same thing going west to east. Small number start in the west and get larger as you travel east.

Mile Marker "1" would be located on the West or South side of the state
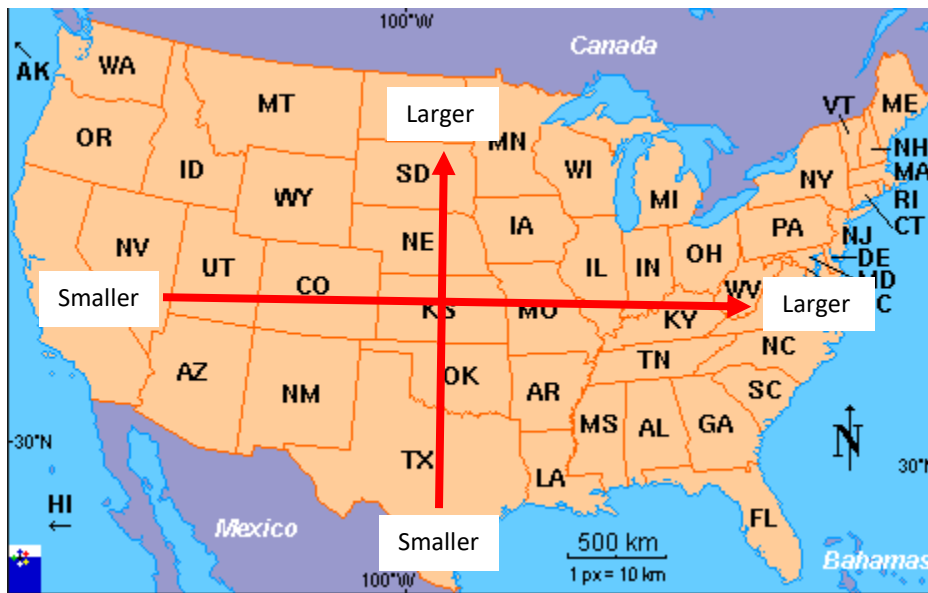
Handling a Highway Call

When a member breaks down on a highway, the following information must be obtained from the member.

- Highway Name
- Direction of Travel (North, East, South, West)
- Nearest Exit or Mile Marker
- Location of Vehicle (right or left shoulder, center median, rest area)

Transit Pros considers all highway disablements an emergency. It is very important that the call be placed as "not safe" and the member is offered police or highway patrol assistance.

If the breakdown location is on a highway, you will need to locate the breakdown location using Google Maps in order to obtain a GPS location and Address. The easiest way to do this successfully is to start large and get small.

Start by locating the State that the member is located.

Next, locate the current, closest, or last city that the member is located within
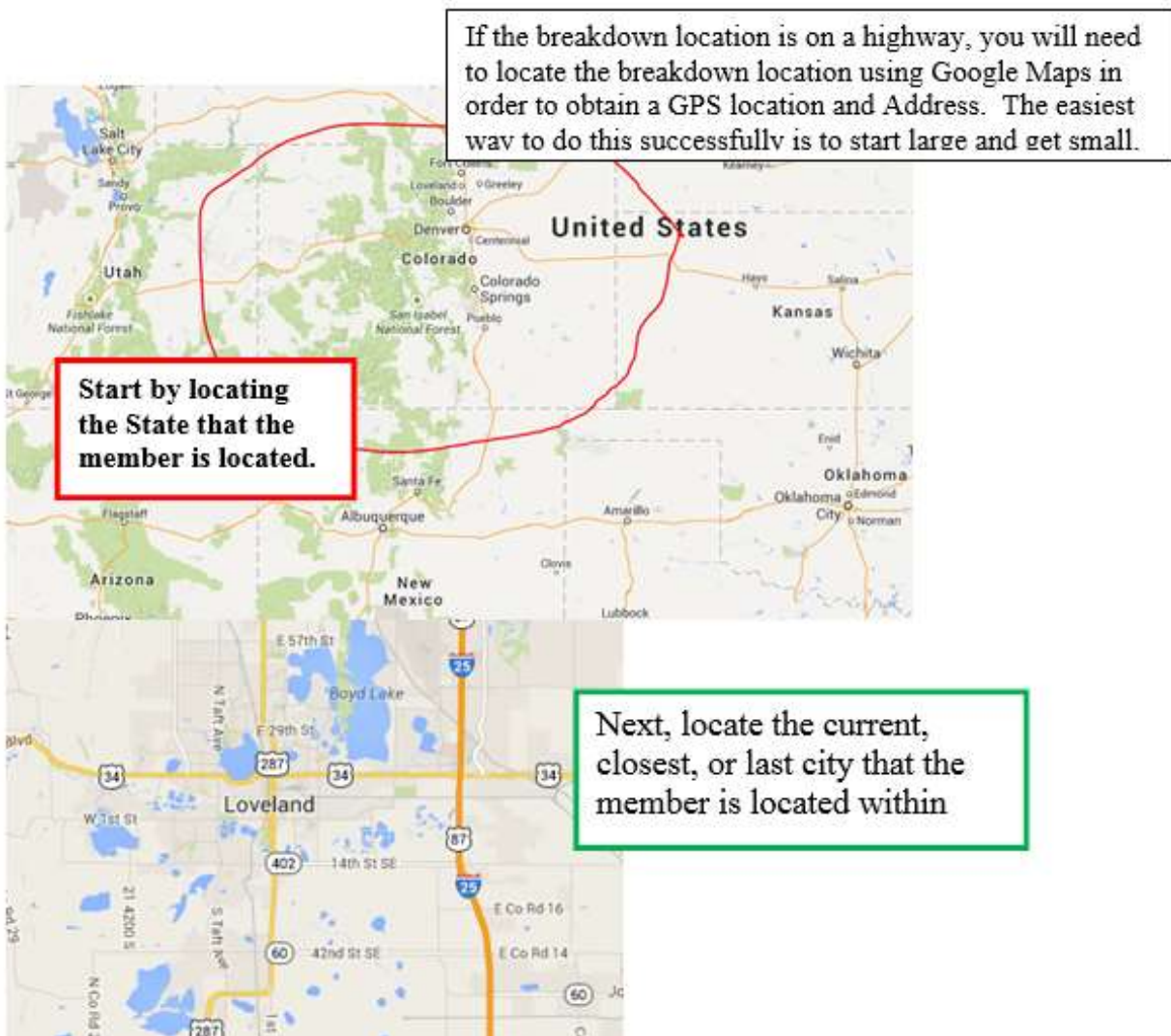
Attempt to locate the closest landmark the member can identify
Ideally a Mile Marker or Exit number.
A physical location will also work (i.e. River, creek, bridge, business, etc.)
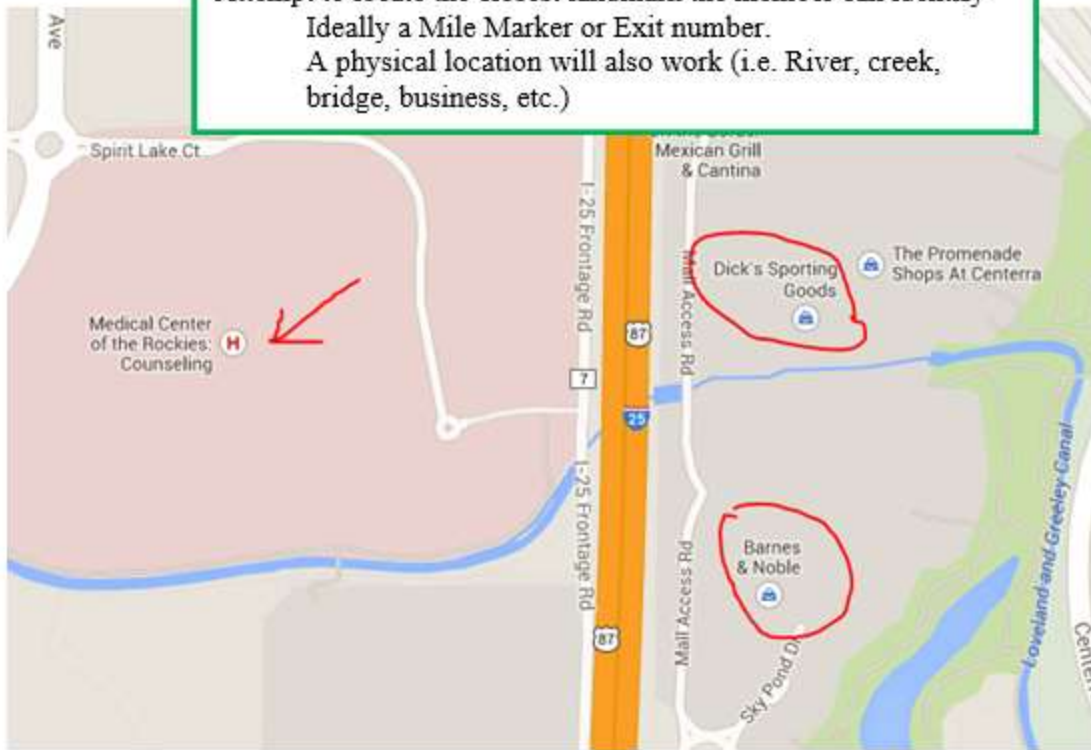
Once the location has been found, you can also obtain the GPS coordinates by right clicking on the map near the location, and selecting "What's here"

Google   29.566906,-95.565222

Once you click on "What's Here", the GPS position of the location you selected appears in the search bar at the top of the page. (See the red arrow)
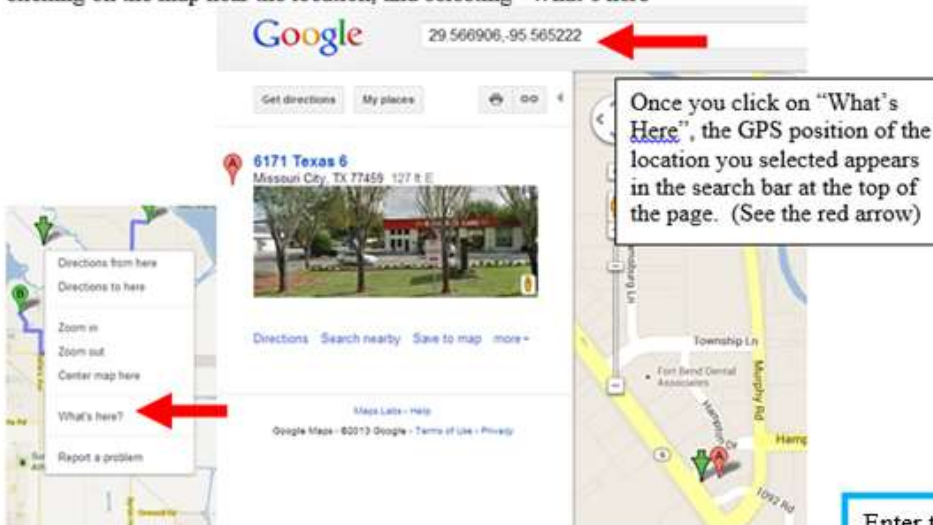
Add New Move Step 3 - Look-Up Pick-Up Location

Enter Coordinates _____ (lat) _____ (lon) ▶

Enter the GPS coordinate into the TP Management system to record the breakdown location.

36

When you have trouble locating a member or a member doesn't know where they are

Start looking from the last place the member knows where they were

Ask the member

1. Where did your trip start?
2. How long have you been driving?

Answers to these questions can help us locate the member knowing that the average speed of a motorhome is 55-65mph.

Example

➢ -If the member has been driving for 3 hours since they left Bakersfield, we can figure they are 37 approx.. 180 miles from Bakersfield
➢ -60mph means they will drive 60 miles in 1 hour. If they have been driving for 3 hours, 3 x 60 = 180. So, we can approximate them as being around 180 miles from Bakersfield.

This does not give us an exact location, but it can give us a general area. From here the CSR can begin to help the member attempt to locate local landmarks to pinpoint a more accurate location.

Ask Questions!!!

➢ Try to pull as much information from the member as possible.
➢ Be sure to be referencing your map while working with the member.

Start Big, don't pigeonhole yourself!!!!

❖ One of the biggest mistakes people make is trying to get too granular too fast. Start big and get smaller.

Listen for queues and keys!!!

❖ Listen to what the member is saying. If the member mentions an airport near them, Google search for airports in the area that the member is located. This could help narrow down your search

"Breakdown Brainstorm"

It can sometimes be very difficult to pinpoint roadside locations. Here are some helpful hints that will allow you to get the call handled quickly.

- It is always helpful to get a complete address.

- For Hwy calls, make sure you get at least one cross street, mile marker or ask for the last town the member was in.

- Remember to ask questions such as: "Is this a County Road (CR-20), a State Road, (SR-20), Interstate (I-40) or Hwy (Hwy 163)?"

- Do not forget to use the zoom button and the directional buttons as they allow you to move around and see more of the general area you are trying to pinpoint an address in.

- If a customer is at a gas station or place of business, get the address off the receipt or ask the member to ask the cashier.

- Google Maps can be a great search tool if the member can tell you the name of a building or business they are at along with the street name.

ERS Services

Towing

- ➢ Tow – <u>Mechanical</u>: Mechanical breakdown
- ➢ Tow – <u>Accident:</u> Disablement is physical damage caused by an accident. May not always involve another vehicle, may not always be located at the accident scene.
- ➢ Tow – <u>Transport:</u> No disablement, transport only
- ➢ Tow – <u>Tire:</u> Disablement is tire or wheel related.

Towing practices and methods

<u>Drive shaft removal</u> – A driveshaft must be detached ("remove" or "dropped") any time a motor vehicle is towed from the front with rear wheels rolling. If a driveshaft cannot or is not removed, the axles must be pulled to tow the motor vehicle from the front.

- ❖ A driveshaft is a mechanical component for transmitting torque and rotation between axles on all motor vehicles.
- ❖ The driveshaft will never need to be removed if the motor vehicle is towed from the rear or on a rollback/hauling equipment
  - o Rear tows – unit must be accessible from the rear, have an acceptable reach from rear bumper to rear axle and have access to inside the vehicle to secure the vehicle steering wheel in place.
- ❖ Pulling rear axles – releasing rear axle component as an alternate to releasing the driveshaft component. This practice is not common but used when a driveshaft cannot be removed due to rust or stripped driveshaft parts.
- ❖ Failure to pull the drive shaft or axles before towing a unit from the front will result in continued torque/motion which can/will result in damage to the unit's transmission.

<u>Non-towable unit</u> – A unit that cannot be towed due to unit/tire/wheel/axle condition. These units will require a flatbed or hauling trailer for transport. Some units may be towable with on-site labor performed.

- ❖ Photos – Always request photos from the customer/PUL. Photos will help TP/vendors assess the situation and keeps our cost realistic to the event. If a customer cannot send photos for any reason, note the move with the reason.
- ❖ Dimensions – Unit length and height is needed to determine the proper equipment/method. Unit weight and width is not always necessary but preferred.
- ❖ Tandem axle trailers – Some trailers can be towed with the disabled axle chained up – labor of removing tires and securing axle up so the trailer can be pulled on the roadworthy axle
  - o Unit length, weight and tow distance all factor into this method
  - o This is a common practice for empty semi-trailers with a disabled wheel/axle
  - o This method should not be used for travel trailers – too much weight on singled out axle and often designed with nothing to attach/chain up axle.

Accident Scenes

Accident scene's take priority over everything else. An accident scene should never be put aside to work another move or handle another situation. All available CSRs are expected to assist on accident scene moves with clear communication amongst the team.

Be aware and clear of the situation. Is the unit clear of the road or blocking roadway? Is there cargo involved and what is the condition of it? How long ago did the incident occur? Are the police on scene?

Utilize resources to fill in the blanks if a driver is not available: Client, PD if on scene, our tow provider (may know about the accident), google (news/social media may have images of the accident to assist)

- Work fast – Notify ERS team and managers immediately after an accident scene intake – do not let this hold up next steps.
- Verify all details and unit condition with driver if able. If driver is unavailable, utilize resources to fill in the blanks.
- Get photos if able.
- Determine if police are on scene.
    - o **If no:** Inform driver we will have an ETA momentarily. Advise driver if PD does show up, let the officer know Transit Pros is sending a wrecker and to call TP immediately.
    - o **If yes:** Inform TP is sending someone and confirm the police have not sent anyone. Speak to the officer directly if able.
        - ▪ Notify a manager or Senior CSR immediately.
- Find out what equipment vendor will use and a cost. If an all-in is not available, get the rates on equipment/labor and negotiate.
    - o DO NOT dispatch a vendor without cost or equipment breakdown.
    - o DO NOT send the first vendor with an ETA unless the cost lines up for the job – balance cost and time.
- Have TP tow vendor take photos of unit and equipment on scene.
- ➤ **If PD has already called a vendor out or there is a wrecker on scene:**
- Find out who.
    - o Call vendor and see if they will work out a quote to get the unit to client requested destination with TP directly. The goal here is to work out billing with the vendor and get the unit to the delivery if we have one - negotiate. If vendor is refusing and taking unit to their lot – confirm with PD this was a nonconsensual tow.
        - ▪ **If nonconsensual PD rotation tow:**
            - • Update client immediately and let them know we will keep them updated.
            - • Confirm the address of where the unit is being taken to
            - • Request the vendors invoice and photos of unit and vendor equipment on scene.
            - • Notify a manager.

Other Services (non-tows)

- ➤ <u>Service – Fuel:</u> Fuel delivery
  - o Always confirm and specify gas or diesel fuel along with the amount of fuel needed.
  - o Tractors will typically need primed after fuel is added.
- ➤ <u>Service – Jump:</u> Jump staring dead batteries.
  - o Manual transmission tractors can also be "pull-started"
- ➤ <u>Service – Lockout:</u> Entry into vehicle. *Locksmiths will be best option when available
  - o RVs – Always confirm and specify the lock type. Housing locks will require a locksmith.
- ➤ <u>Service – Winch:</u> Pull unit out from a specific location/environment where it is stuck
  - o Photos – required before dispatch unless unattended or unable to obtain in which it must be noted why. If before photos are unavailable, you are required to ask the vendor to take before and after photos at dispatch with follow up on the photos at completion.
  - o Additional information needed – what part of the unit is stuck, ground conditions stuck in and how far from solid ground
    - ▪ Ex. Front tires stuck in mud 15' from solid ground, Truck on concrete and trailer tires stuck in sand 2' from the concrete
- ➤ <u>Service – Mobile Repair:</u> On site repairs that do not require mechanical diagnostics
  - o Ex. Battery replacement, airline repair/replacement
- ➤ <u>Service – Tires*:</u> Tire change with good spare
  - o *Tire sales and repairs are available and worked through a separate system. Experienced CSRs handle these services and additional on the job training will be provided in future training phases.

"Transload" (Cargo Handling)

- ➢ Transload: Transporting cargo from a disabled trailer to a roadworthy trailer
- ➢ Rework: Securing cargo to meet standards for delivery and normally discovered when driver is delivering load. This may involve rewrapping pallets.
- ➢ Load shift: Rearranging cargo to meet DOT regulations. Normally discovered when driver goes through scales

Transload

Transporting cargo from a disabled trailer to a roadworthy trailer.

Will need the following:

1. Is the unit safe to drive to a vendor's lot?
    - o Keeps cost down but only acceptable if safe and client/driver agree.
2. ETA of client's good empty trailer to be on scene for the transload
3. Cargo details:
    - o What the cargo is and cargo weight
    - o On pallets or loose box? How many pallets?
    - o Do we have permission to break the seal yet?
    - o Request pictures of cargo before dispatch if we/driver have permission to break the seal
4. Have vendor take pictures throughout the process Including the following:
    - o Take a photo of the original seal still intact on the trailer
    - o Take a photo once seal is broken and the doors are opened (basically a photo of the doors open showing the product)
    - o Take a photo before the doors get closed of the product on the trailer
    - o Put a new seal on and take a photo of the doors closed with the new seal number
    - o **Email the above pictures with the start / completion time to client at completion

Rework

Securing cargo to meet standards for delivery and normally discovered when driver is delivering load. This may involve rewrapping pallets.

Will need the following:

1. Is the unit safe to drive to a vendor's lot?
   o Keeps cost down but only acceptable if safe and client/driver agree.
2. Cargo details
   o What the cargo is and cargo weight
   o On pallets or loose box? How many pallets need reworked?
   o Request pictures of cargo
   o Is there damage to the cargo? If so, what would the client like done with it.
3. Have vendor take pictures throughout the process Including the following:
   o Take a photo of the original seal still intact on the trailer (if applicable)
   o Take a photo once seal is broken and the doors are opened (basically a photo of the doors open showing the product)
   o Take a photo before the doors get closed of the product on the trailer
   o Put a new seal on and take a photo of the doors closed with the new seal number
   o **Email the above pictures with the start / completion time to client at completion

Load shift

Rearranging cargo to meet DOT regulations. Normally discovered when driver goes through scales

Will need the following:

1. Does DOT have the driver stopped? If not, can the driver drive to a vendor's lot? This usually keeps cost down but is only acceptable if the driver is safe to drive and our client agrees
2. Cargo information
    - What the cargo is and total cargo weight
    - On pallets or loose box
    - Weight on the following:
        - Steer – front of tractor
        - Drive – rear of tractor
        - Trailer – rear of trailer / tandem axles
    - Do we have permission to break the seal yet?
    - Request pictures of cargo before dispatch if we/driver have permission to break the seal
    - Has the driver tried to adjust the 5th wheel plate or tandems to distribute the weight?
3. Have vendor take pictures throughout the process Including the following:
    - Take a photo of the original seal still intact on the trailer (if applicable)
    - Take a photo once seal is broken and the doors are opened (basically a photo of the doors open showing the product)
    - Take a photo before the doors get closed of the product on the trailer
    - Put a new seal on and take a photo of the doors closed with the new seal number
    - **Email the above pictures with the start / completion time to client at completion

<mark>***Load shift: axle weight capacity***</mark>

Steer Axle
12K lbs.

Drive Axles
34K lbs.

Tandem Axles
34K lbs.

Sliding
5th Wheel

Sliding
Tandem

Adds weight to steering
axles and reduces weight
from driving axles

Adds weight to tandems
and reduces weight
from driving axles
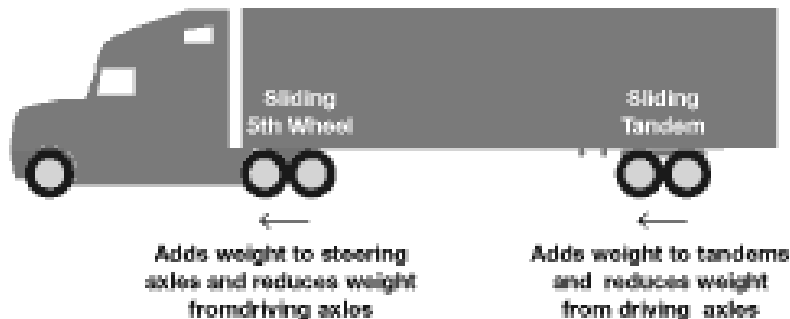
Container Flip

Removing a container from a disabled chassis and placing it onto a good chassis making it. An empty chassis is referred to as a "bare chassis".

This process is best when there are disablements to a chassis making it not towable. Once the container is removed, the bare disabled chassis can then either be made towable with labor or be transported on a landoll trailer. Typically, a fully loaded container will need two rotators to complete the container flip where as an empty container may only need one rotator or two smaller heavy duty wreckers.

Upright a unit

Some units, typically trailers, may need upright from their side only or lifted up from soft ground and relocated. These will be categorized under "Winch out" with special instruction details the situation and service needed.
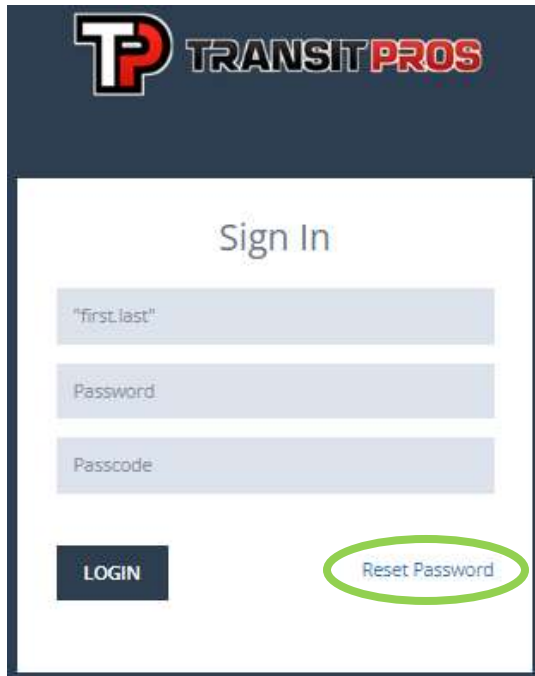
If landing gear is sunken and unit needs lifted, it is important to know if a driver is on site to hook to the trailer once lifted or if our vendor will need to come equipped to relocate the unit to solid ground.

ERS System
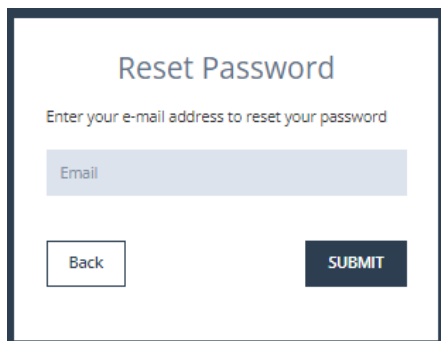
System Login and Reset Password

- ❖ System link: https://www.transitpros.app/admin/login.php?co=erstires
- ❖ Login: first name.last name
- ❖ Password: Custom – see password reset for initial set up.
- ❖ Passcode: Only required for password reset. No entry on Sign In after password is reset.

Reset Password:

- ➢ Select "Reset Password" in lower right hand of Sign In screen.
- ➢ Enter TP email address > Submit
    - o <u>Password</u> will be emailed to your TP email address
    - o <u>Passcode</u> will be texted to your personal cellphone

- ➢ At main Sign In screen, enter:

- o Username
- o Temporary password (emailed at reset)
- o Passcode (texted at reset)
- o Submit
- ➢ Change Password
  - o Enter new custom password
  - o Repeat new custom password and select "Submit"

CHANGE PASSWORD

CHRISTA.PATTERSON

⚠ You must reset your temporary password to access the management system

Password *	Enter a password
Password *	Repeat password
	Submit

- ➢ Confirm password is updated.
  - o If a repeat password is used, retry with a new password
  - o Close to return to main Sign In screen

CHANGE PASSWORD

CHRISTA.PATTERSON

☑ christa.patterson was updated successfully.

⊗ Close

- ➢ Login with new password. **Leave Passcode blank.**
- ➢ Auto save new password (pop up box in upper right-hand corner)

TRANSIT PROS

Sign In

"first.last"

Password

Passcode

LOGIN   Reset Password

ERS Master Move List

The only two top header options that you will use is ERS Moves and Vendors

- ❖ ERS Moves: Create New Move and return to Master Move List
- ❖ Vendors: Vendor dashboard to view vendors profile and unlock a vendor (if approved)
- ❖ Tire Orders: Not functional. TP Tires system will soon be integrated into this system.

Select refresh to update the screen – The system does not live update.

Move list filters – used to locate moves. Must select Submit after entry.

- ❖ NAVW – Stands for New, Active, Verified and Working. The system will default Master move list to this status.

- o New – Step 1 completed
- o Active – note used
- o Verified – Step 2 completed
- o Working – Assigned to a CSR (manually through move)
- ❖ Status – All moves visible
- ❖ SOP – Stands for Scheduled, On-scene and Picked Up. This is used to track all follow ups.
- ❖ Cancelled – View cancelled moves
- ❖ Hold – View moves in Hold status. Hold status is used for moves needing manager attention after service complete and moves where unit went back to a vendor's lot.
- ❖ Offer – Moves out to bid, will go back into NAVW once bidding time expires OR when status is manually changed. *TL/Managers will manage putting moves in/out of bidding. On duty staff is responsible for monitoring moves out to bid.

Other ways to filter and locate move. *Must change from NAVW to "Status" to apply other filter to all moves in all status.

- ➢ State
- ➢ Zip – will apply to both pick-up and delivery zip code
- ➢ TZ – Time zone
- ➢ Service date
- ➢ Move # and PO – "Lot #" = PO
- ➢ Service Type
- ➢ Coverage Type
- ➢ Client
- ➢ Vendor – Enter vendor name or first word of vendor name followed by the percentage sign (%) with no space.

Creating A Move

- ➢ Select "Create Move" from one of tow location on the ERS Master Move List
  - o Under "ERS Moves" tab
  - o Blue header to the right on "Refresh"

Step 1 – Intake

General information provided by a client rep (or customer). If we are missing or waiting on information for a required field, enter "Need" to bypass/create the move.

- ➢ Enter and select client name (will auto populate options text is entered)
- ➢ Select "Proceed to Step 1"

```
Create ERS Move - Step 1

Customer Info                                    Primary Asset
Client Group ↺ *   [Search...]                   Weight *   [_____ ▾]
Safe Location *    [_____ ▾]              Year *     [_____]
Customer Name *    [_____]                Make *     [_____]
Customer Phone # * [_____]                Model *    [_____]
Service Type *     [_____ ▾]              Damage Detail [_____]
Level *            [_____ ▾]
Pick-Up                                          Secondary Asset? *  [_____ ▾]
Location Name *    [_____]                Damage Detail  [_____]
Address *          [_____]
Cross St.          [_____]                Coverage - Primary
City *             [_____]                Coverage Type *  [_____ ▾]
State *            [_____ ▾]              Coverage Limit   [_____ ▾]
Zip *              [_____]                Loaded Miles     [_____]
Lat/Lon 📍          [_____]                Client Info
Primary Drop-Off                                 PO # *          [_____]
Location Name      [_____]                         [ Submit ]
Addr 1             [_____]
City               [_____]
State              [_____ ▾]
Zip                [_____]
Phone #            [_____]
Lat/Lon 📍          [_____]
```

Customer Info

❖ Client Group – Client name (pulled from previous step)
❖ Safe Location – Ask "Is the driver in a safe location?"
  o If no, suggest the customer call authorities if they feel unsafe while we work quickly to locate service. Treat the move with high urgency. <u>Do not ever decline a move, suggesting they call the police because customer is not in a safe location.</u>
❖ Customer Name – Point of contact for verification (Step 2). Member, truck driver or insured.
  o If unattended with no driver information, enter "Unattended"
  o **Do not list a client reps name as the Customer Name** – tow vendors will see this information on dispatch paperwork, and we do not want our vendors reaching out to our clients direct.
❖ Customer Phone – Point of contact for verification (Step 2). Member, truck driver or insured.
  o If unattended with no driver information, enter "9999999999"
  o **Do not list a client reps' phone # as the Customer Phone** – tow vendors will see this information on dispatch paperwork, and we do not want our vendors reaching out to our clients direct.
❖ Service Type – Service requested by client. Delivery Location will be removed on all non-tow services.
❖ Level – Urgency to determine priority level
  ➢ **Roadside with Vehicle** - Roadside location, driver with vehicle
  ➢ **Safe Location with Vehicle** - Not roadside, driver with vehicle

➢ **Unattended** - No driver with vehicle

Pick-Up

❖ Location Name – Be specific
  o Physical address > Ex: Home Depot DC vs. Parking Lot or Sunshine RV Resort Space 7 vs. RV park
  o Roadside location > Enter Hwy with mile marker or crossroads including direction traveled. Ex. "I-75 SB, mm 239", MO-13 SB just before I-44 WB"
❖ Address
  o Physical address > enter street address
  o Roadside > enter Hwy with mile marker or crossroads including direction traveled (same as location name)
❖ Cross St – Only applies to roadside
❖ City, State, Zip
❖ Lat/Lon – Bypass on Step 1. Must be mapped and entered on all roadside locations in Step 2.

Primary Drop-Off

❖ Drop-Off is Vendor Lot?: Select if the delivery address will be vendor's lot for storage.
❖ Location Name: Enter specific location name.
  o Ex. Rush Truck Center vs Shop
❖ Addr 1: Street address
❖ City, State, Zip
❖ Phone #: if available
❖ Lat/Lon: Only necessary when physical address is not pulling up on google maps

Primary Asset

❖ Weight – Unit weight class. Must verbally confirm what client has listed on all ARS intakes.
❖ Year, Make, Model – If unavailable, us a description of the unit
  o Ex: 0000 53" Dry Van Trailer, 1990 20' ball hitch camper
❖ Damage Detail – Description of damage if available on intake. This can be modified in Step 2 verification.
❖ Secondary Asset? – Secondary Asset is aka for a trailer. In this potion you will also specify if the driver needs dropped at a location different than the unit.
  ➢ **No-Pick-Up/Service Primary Asset Only -** No trailer. Passenger going to same delivery as the unit if there is one
  ➢ **No-Driver Requires Secondary Drop-off** - No trailer. Passenger needs dropped off at a second location. When selected, Secondary Drop-Off will populate.
  ➢ **Yes-Use Primary Delivery location -** Yes trailer. Trailer is going to the same delivery location as the power unit. When selected, Secondary Asset and Coverage-Secondary will populate.
  ➢ **Yes-Requires Secondary Drop-off -** Yes Trailer. Trailer is going to delivery location different than the power unit. When selected, Secondary Asset, Secondary Drop-Off, Coverage-Secondary and Delivery Instructions will populate.

Secondary Asset (if applicable)

- ❖ Year, make, model – If not available, use a description. Ex: 1111, 53', Dry Van or 2008, 20', Enclosed Trailer. Do not let missing trailer year, make model hold up move progress if we have enough details about the trailer to proceed.
- ❖ Damage Detail

Primary Asset	
Weight *	Heavy
Year *	2019
Make *	Freightliner
Model *	Cascadia
Damage Detail	Radiator damage
Secondary Asset? *	Yes - Requires Secondary Drop-off
Delivery Instructions	Drop Yard - Trailer and Driver / Velocity Truck Centers - Tractor

Secondary Asset	
Year	0
Make	53' Container
Model	Chassis
Damage Detail	None - disablement is to tractor

Coverage - Primary	
Coverage Type *	Full Coverage

Coverage - Secondary	
Coverage Type	Full Coverage
Coverage Limit	

Coverage - Secondary

All fully covered secondary assets for AAA, ACG, CAA & ARS require a second PO – aka "Secondary Asset PO/Call #"

No "Secondary Asset PO/Call #" is needed if secondary asset is not covered. We will collect payment from customer on the overages.

No "Secondary Asset PO" is needed for Truck line client moves – both truck and trailer will always be fully covered under one PO.

Secondary Drop-off (if applicable)

❖ Location Name – Be Specific. Include what/who is being delivered at the Primary and Secondary Drop-Off. Ex: "Hub Group Terminal - driver" or "Trailer to Union Pacific Rail Yard - trailer".

o Primary Drop-Off = Primary Asset
o Secondary Drop-Off = Secondary Asset

Primary Drop-Off

Location Name	Velocity Truck Centers - Tractor
Addr 1	319 Fesslers Ln
City	Nashville
State	TN
Zip	37210
Phone #	
Lat/Lon 📍	36.2724315,-86.6543365

Secondary Drop-Off

Location Name	Drop Yard - Trailer and Driver
Addr 1	399 Old Hickory Blvd
City	Old Hickory
State	TN
Zip	37138
Phone #	
Lat/Lon 📍	

Coverage Primary – tailored to client type. Follow client protocols and always verify coverage on intake except on fully covered Truck Line clients.

Coverage Type

➤ **Full Coverage** - fully covered, no out of pocket expense to customer
➤ **Partial Coverage** - partially covered up to a limit. Coverage Limit will auto populate when Partial Coverage is selected.
➤ **None** - no coverage, customer pays in full out of pocket

Coverage Limit – covered up to a specified mileage or dollar amount

➤ **Dollar** - auto populated Dollar Amount field > enter dollar amount
➤ **Mileage** - auto populates Mileage Amount field > enter milage amount

Loaded Miles – tailored field for motor club clients and only required on all ARS intakes

❖ Must ask ARS rep "How many loaded miles do you show for this tow?"

All fully covered secondary assets for AAA, ACG, CAA & ARS require a second PO and second move built.

Client info – Internal client billing piece and tailored to each client type.

AAA and ACG (motor club)

- ❖ **Call #** - Required. We will not dispatch without a call #
- ❖ **Member ID#** - members 16-digit AAA membership ID #
  - o If club cannot provide, enter NA
- ❖ **Facility ID#** - ID AAA has assigned to Transit Pros in their system. The facility IDs are listed next to each AAA/ACG clubs in clients and should be the first question asked on intake. Make sure the client selected matches the facility ID provided by client.
- ❖ **Special Instructions** - include client reps name and any special requests made by client.

ARS (motor club)

- ❖ **PO** - 10-digit purchase order #. If client says they will be calling back with it, enter "need" and note the move. We will not Dispatch without a PO.

Agero/Swoop and CAA (motor club)

- ❖ **PO** - If no PO #, ask for a reference #. We must have a PO or reference # to proceed as we will need it to call client back for upfront payment.
- ❖ **Special Instructions** - rep's name and callback # for us to reach back out to collect upfront payment.

All Truck Lines – Hub Group, J&R Schugel, Evans Delivery, Updike Logistics, CoreTrans

Client Info	
Truck # *	
Trailer # *	
PO # *	
Special Instructions	

- ❖ **Truck #** - If no truck, enter "NA"
- ❖ **Trailer #** - If no trailer, enter "NA"
- ❖ **PO** - Purchase order # used for billing
- ❖ **Special Instructions** - Include client rep's name, phone # and email address

Insurance Companies – National General, Sentry, Northland Insurance

Client Info	
Claim #	
Unit #	
PO # *	
Special Instructions	

- ❖ **Claim #** - Insurance file claim #
- ❖ **Unit #** - If none, enter "NA"
- ❖ **PO #** - Re-enter claim #. The claim # will be the PO used for billing if insured is covered for services.
- ❖ **Special Instructions** - Include client rep's name, phone # and email address

Nationwide (insurance company)

Client Info	
PO # *	
Special Instructions	

- ❖ **PO** - Enter claim #
- ❖ **Special Instructions** - Include client rep's name, phone # and email address

Step 2 – Verification/VCR with customer

Step 2 will automatically pull the following information from Step 1. These fields must still be verified when speaking with the customer. If the customer requests a different drop-off location, we must get approval from the client (unless single use client).

- ❖ **Primary Asset** (and Secondary Asset when applicable) – Year, make, model and damage details
- ❖ **Pick-Up**
- ❖ **Primary Drop-off** (and Secondary Drop-off when applicable)
- ❖ **Coverage** – If there is a coverage limit, inform the customer AFTER completed Step 2 and let them know we will reach back out shortly to inform them of out-of-pocket expense. We will require a credit card payment before dispatching our vendor – we accept Visa and Mastercard.

Additional VCR information:

➢ **Category** – Unit type. Additional fields will populate based on the unit category.
➢ Special Instructions – Additional details pertaining to the unit that TP and vendor need to be aware of.
  ○ Ex, truck #, lot #, alternate customer phone #, gate code, customer call ahead instructions, etc.
➢ **Key location** – Detailed and specify if unit is locked/unlocked if keys are in the unit with no driver on site.
  ○ Ex. With driver and unit, cup holder and unlocked, cup holder and locked, dip stick, ignition, no keys and unlocked, no keys and locked, unknown, etc.
➢ **# Passengers** – Passengers riding with the tow truck. Always ask
  ○ Tow truck may take 1 or 2 passengers – must infirm vendor and confirm they can ride.
  ○ If more than 2 passengers, inform customer that tow trucks are equipped to take 1 or 2 passengers and advise they start working on transportation arrangements while we work on their service
  ○ Animals – Animals can stay in the unit being towed while in tow. It is up to the tow drivers discretion if they allow an animal in their tow truck and is not required of them. People cannot ride in the unit being towed while in tow.
➢ **Towable** – Are tires, wheels and axles in good shape making the unit towbale.
➢ **Accessible** – Is there a clear solid ground path to the front of the unit for the tow truck to hook and go? Questions to determine this (include the answer/descriptions in special instructions):
  ○ Where on the property is the unit?
  ○ How far from solid ground is the unit?
  ○ Is the unit backed in nosed in? Is there access to the front of the unit?
➢ **Sitting On** – Ground type
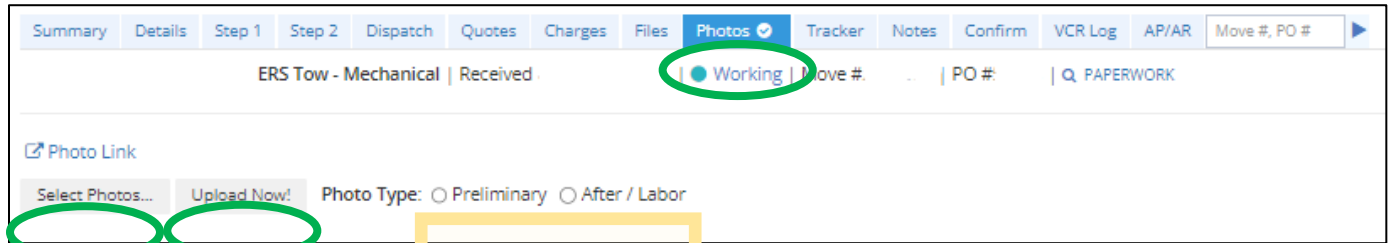
Details

Editing/updating information

- ➢ Pick-up location and delivery locations – client must be updated and approve all delivery changes
- ➢ Overrides
  - o Service Type – client must approve all service type changes
  - o Weight Classification
  - o PO
  - o Status – Not to be used in place of trip confirming on scene, picked-up and delivered. Is used for the following:
    - ▪ Cancelled
    - ▪ Hold – unit back at vendors lot for storage, hourly quotes needing finalized that were not available at completion and
    - ▪ Working
  - o Client
  - o Client quote – Required on all client quote approvals
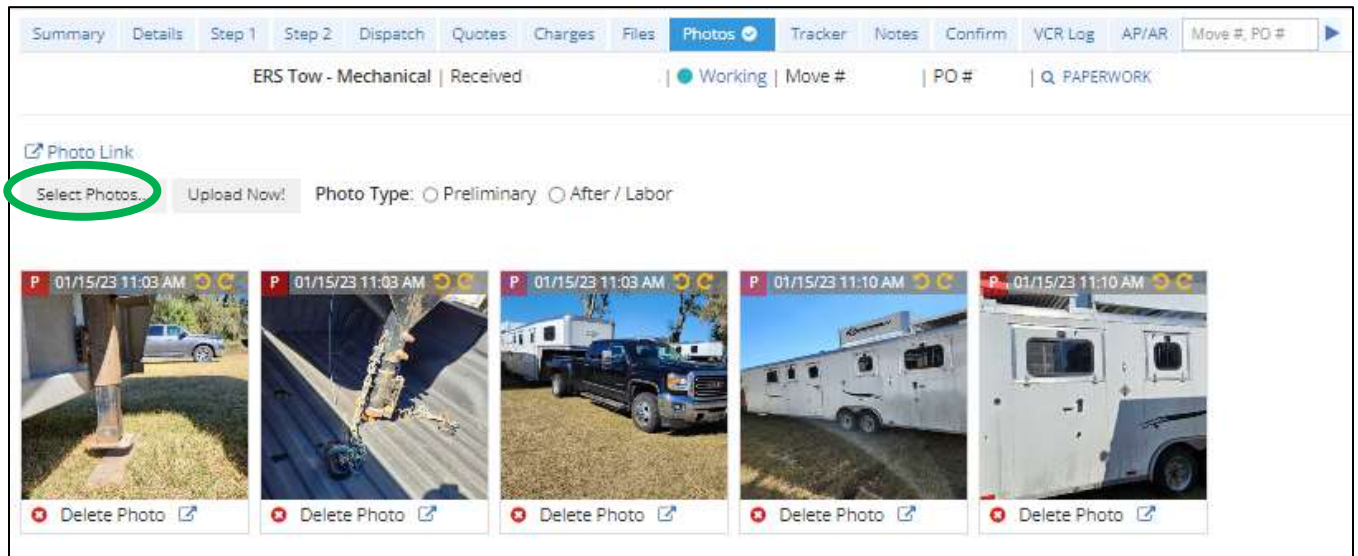
Photos

Adding photos to move – once added photos will be visible and can be sent to vendors through the system or client through a link.

- ➢ Select Photos tab on move
- ➢ Select "Select Photos…"
- ➢ Select downloaded photo(s)
- ➢ Select either Preliminary or After/Labor
  - ○ Preliminary – Photos as unit/environment stands before our vendor starts the job
  - ○ After/Labor – Vendor on-site and after photos
- ➢ Select "Upload now!"

Photos Link – can be emailed outside the system.

- ➢ Select Photos tab on move
- ➢ Select "Photo Link"
- ➢ Copy/paste the URL link at top of screen into email

*See dispatch below for instructions on sending photos to TP vendors.

Dispatch

All vendor calls will be logged under the Dispatch Tab. All calls to vendors outside of TP vendor list need noted in move notes.

Filtering and viewing vendor list

Capabilities and Equipment filters – filter vendors based on their vendor profile. Although this tool is helpful, do not rely entirely on these filters as not all vendors have completed or updated their profiles.

"50" – System automatically set to show vendors within 50 miles. Select drop down to increase.

Proximity Map (red pinpoint icon) – map showing vendors location in proximity to the pick-up and delivery location.

D / P – Select to toggle between pick-up and delivery side. This tool is helpful in locating a vendor from the delivery side on long distance tows.

Vendor Override Search – Enter vendor name or first word of vendor name followed by the percentage sign (%) with no space.

Restrictions, Insurance and W-9

NDOR	CSR	Q	$Q	#180	RES	INS	W9	PHONE
Antonio Neville Trucking Service Inc.	🔒	Q	$2,000	2	⚪	🟡	🟢	(404) 427-9038
A Mobile Maintenance - Conley		Q		0	⚪	🟡	🟢	(866) 810-6765
Need A Fix LLC		Q		1	🔴	🟡	🟢	(404) 396-9155
Allneys		Q		0	⚪	🟡	🔴	(404) 573-2035
A Mobile Maintenance - Stockbridge		Q		0	⚪	🟡	🟢	(866) 810-6765
Ready Fleet LLC - Jonesboro		Q		0	🔴	🟢	🟢	(913) 800-1990
Split Second Transport		Q		0	⚪	🟡	🟢	(404) 226-3312
SOUTH METRO TOWING		Q		0	🔴	🟡	🔴	(404) 624-8071
New Image Towing - Forest Park		Q		15	🔴	🟢	🟢	(770) 252-4392
A Mobile Maintenance - Atlanta		Q		0	⚪	🟡	🟢	(678) 574-7539
Bernal's Towing Service	🔒	Q	$1,425	0	⚪	🟢	🟢	(404) 557-7892

➢ Res – Restriction on vendor's profile.
  o Grey – No restrictions
  o Red – Restrictions on vendor, hover over the red dot for the reason and view vendors profile for additional details. Not all restrictions apply to ERS, always look at the reason before determining if it is okay to call the vendor. See a Team Lead or manager with questions.
➢ Ins – Up to date copy of Certificate of Liability Insurance.
  o Green – Up to date Insurance
  o Yellow – Expired or no Insurance document on file. ERS can still use these vendors as long as vendor agrees to send in updated copy of their insurance.
➢ W9 – contains vendors company tax ID and required to issue payments to vendor
  o Green – W-9 on file
  o Red – No W-9 on file. Most companies have readily available access to their company W-9, especially during regular business hours. Ask vendor to send a copy.

"A-B" and "B-C" mileage

VENDOR	RT	A-B	↻ B-C	TOT
Lakeside Specialized Transportation LLC	📍	27.4	⚡16.6	44
Crystal Bay Marine LLC	📍	21.9	⚡16.6	38.5
North Shore Towing	📍	22.2	⚡16.6	38.8
Loyal Service Transport	📍		⚡16.6	

➢ A-B – Mileage from vendors physical address on file to pick-up location. Select the B-C number to calculate.
➢ B-C – Loaded tow mileage from pick-up location to delivery location
➢ TOT – Total mileage of the above. This is NOT port to port mileage as it does not include vendors mileage back to shop.

Vendor profile – notes and alternate contacts

Vendor profiles contain all vendor contact information on file: phone numbers, email addresses, contact names. Vendor profile notes are also visible.

> ➢ Select vendor's name to view
> - o Vendors physical address
> - o Vendor Since date
> - o Contacts – typically a manager or owner name used for VR contact.
> - o Email addresses and phone numbers
> - o Capabilities and equipment – not always provided or updated
> - o Vendor Notes – Typically a log of notes made by VR

Sending photos and move details to vendors

- ➢ Select the circle (not square) at left of vendor's name
- ➢ Select "Details", click the blue box

- ➢ Select how you are sending photos – always confirm with vendor how they would like to receive the photos. Photos can be sent to more than one email address at a time.
  - o Email – can select an email from vendors profile or add a custom email
  - o SMS (text message) – can select from a phone number on vendors profile or add a custom phone number
  - o Fax – Slowest method, avoid using if vendor can receive through other methods
- ➢ "Email Notes" – enter any additional information the vendor should know.
- ➢ Select "Send Now"

Sample Details email

Logging vendor quotes and declines

- ➢ Select "Q" circle icon
- ➢ **Contact** – name of who you spoke to.
- ➢ **Quote Amount** – Vendors all-in quote without symbols. If quote is an hourly rate, enter 1.00 with rate breakdown in the Notes portion.
- ➢ **Quote Type**
  - o Fixed – All-inclusive, including any applicable tax and credit card fees.
  - o Hourly – Charging by the hour. Note the hourly rate in the notes portion with the Quote Amount at 1.00. Always push for an all-inclusive quote.
- ➢ **Decline Reason** – add additional details in the Notes portion. If vendor is booked, always ask when the soonest they would be able to do the job – still push for an ETA and quote. Ask vendor if they can recommend another company – the tow community can be tight-knit and often companies work together to send each other jobs that they cannot do.
- ➢ **Pick-Up Date**
- ➢ **ETA (minutes)**
- ➢ **Notes** – Pertinent information including decline reasons, hourly rates, equipment being used, labor, recommended vendors, and no answer times (log the time on no answers and callbacks).

Viewing vendor quotes and declines

➢ Select Quotes tab at top of move
➢ Hover over grey "Q" to view decline reason
➢ Select grey "Q" to make changes and select "Update Quote"
➢ Hover over "CSR" icon to view who logged the entry

Assigning a vendor and sending paperwork

Assigning a vendor can be done through both the Dispatch Tab and Quotes Tab

- ➢ Select the Green "Q" to view the quote entry
- ➢ Select "Dispatch Vendor"
- ➢ If vendor's ETA or quote changes at dispatch, you must update the entry and select "Update Vendor Quote" then refresh the screen. Once the update is confirmed, select the green "Q" and "Dispatch Vendor"
- ➢ Send Paperwork – Select how you would like to send the paperwork: Email, sms or fax. The system will provide contact options from vendors profile, or you can add customer. ALWAYS verify with vendor how they would like the paperwork. Paperwork is not required for dispatch so make sure vendor has all info verbally to prevent any hold ups.

Resending Paperwork

Dispatch paperwork can be resent if an error occurred at dispatch or vendor requests paperwork be resent

- ➤ Select Dispatch tab at top of move
- ➤ Select "Resend Paperwork"

Remove Vendor (VBO)

If a vendor backs out of a job for any reason, log the VBO (vendor back out) and work on re-dispatching.

- ➤ Select Dispatch tab at top of move
- ➤ Select "Remove Vendor (VBO)"

Changing vendor quote after dispatch

All vendor quote changes need to be validated, negotiated, approved by TL or manager (during regular business hours) and noted in detail with the listed information.

- ➢ Select Dispatch tab at top of move
- ➢ Select "Quote Change"
- ➢ Enter new amount without symbols
- ➢ Select Reason
- ➢ Enter Quote Change Notes – must include a valid reason, specific labor or equipment needed, amount of wait time if applicable, negotiations and what TL or Manager approved (during regular business hours)
- ➢ Select "Request Quote Change"

Submit Dry Run

A dry run is submitted anytime a move is cancelled after dispatch or when a vendor arrives on scene and cannot complete the job. *See GOA / Dry run protocol guide

- ➢ Select Dispatch tab at top of move
- ➢ Select "Submit Dry Run"
- ➢ **Client Notes** – Who you spoke to with client. Motor club clients: request and document "GOA"
- ➢ **Pick-Up Location** – customer communication and outline of events

- ➢ **Vendor** –Vendor communication and outline of events
- ➢ **Duplicate Move?** – Yes, if re-dispatching
- ➢ Select "Submit Dry Run"

Charges – Add Credit Card Payment

- ➢ Select "Add Credit Card Payment"
  - o Never use "Add Advanced Charges" (managers only)

- ➢ Fill out PayTrace Credit Card Payment fields
  - o **First / Last Name** - as it appears on customer's card
  - o **Address** - copy/paste as it appears in google. Wrong abbreviation or punctuation may result in an error/decline.
  - o **Phone / Email** - for customer. A receipt will be sent to customer's email address.
  - o **Credit Card #** - Do not enter dashes.
  - o **CVV** - 3-digit code, typically located on back of card
  - o **Total** - Do not dollar symbol ($). Numeric with decimal only. Ex. "123.45"
- ➢ Select "Process Credit Card Payment"

Notes

A note entry is required for every phone call or action taken on a move (except for vendor quote, ETA and decline reasons that are logged in the Dispatch tab). System actions will auto populate notes - manual notes are still required for all calls and actions. Failure to do so can result in miscommunications, confusion, unnecessary workloads for the department and most importantly service failures. Notes are a job requirement. **If it's not noted, it didn't happen**. Notes can be viewed and added two ways – Summary tab and Notes tab.

Summary tab

➢ Select "Notes +" to add notes
➢ View notes at bottom of Summary

Notes tab

➢ Select "+ Add Notes" to add notes
➢ View notes below

| Summary | Details | Step 1 | Step 2 | Dispatch | Quotes | Charges | Files | Photos | Tracker | Notes | Confirm | VCR Log | AP/AR | Move #, PO # | ▶ |

ERS Tow - Mechanical | Received | ● Cancelled | Move # | PO # | 🔍 PAPERWORK

Circle K Gas Station
6410 FL-64 Bradenton, FL 34208 |

Gerzenys RV world
6120 S.R. 64 East Bradenton, FL

↺ ⊕ Add Notes | Internal Vendor Client Accounting | View All Notes

Verified > Cancelled - Reason: see notes

❌ ● 01/11/23 11:36A | Dispatch Details Changed
mstat=Verified:Cancelled

❌ ● 01/11/23 11:36A | Cancelled move
- Who cancelled: ACG Rep Rhonda
- Reason for cancel: customer wanted a set price for going up I-75, did not want to go to the delivery location we were giving, now not answering the phone
- Approved by: TP Lead Chris

❌ ● 01/11/23 11:34A | Called Rhonda
Updated her on what was going on with the customer, she said that there is nothing that they can do for this but cancel it for now.

❌ ● 01/11/23 11:12A | Called customer
Completed step 2 but she said she did not want to go to the delivery location AAA gave us. She wanted to know how far up north on I-75 with her $500 coverage. Tol
coverage. She started to get upset because she has been waiting 10 days to get a tow from AAA so she can get home to her kids. She hung up on me mid-conversatio

Tried to call back and no answer

❌ ● 01/11/23 11:06A | Step 2
Completed

❌ ● 01/11/23 10:45A | 4th attempt
Called customer, no answer, VMB is full

❌ ● 01/11/23 10:37A | Customer sent a SMS

Adding a note

*Always leave as Routine and Internal

- ➢ **Enter Summary** - specific summary including who the communication is with when applicable
- ➢ **Enter Notes** - a brief and detailed notation outlining who you spoke to, the situation, any action needed and resolution.
- ➢ Select Add Notes

- ➢ Select "Reload notes tab" to proceed to Notes tab or the "x" in the upper right-hand corner to return to previous screen (no email notification needed).
- ➢ Select "Notify Staff" to send notes and notify internal TP staff
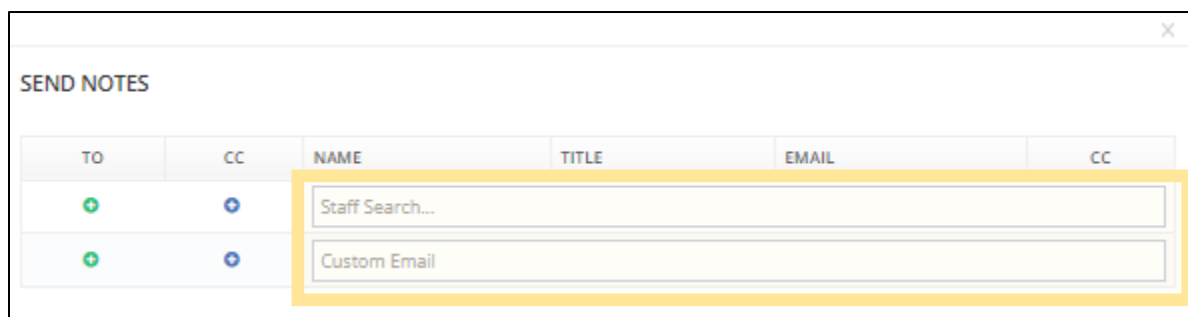
Emailing through notes

Notes can be emailed internally through the move to individuals and departments. This feature should be used for internal Transit Pros email addresses only.

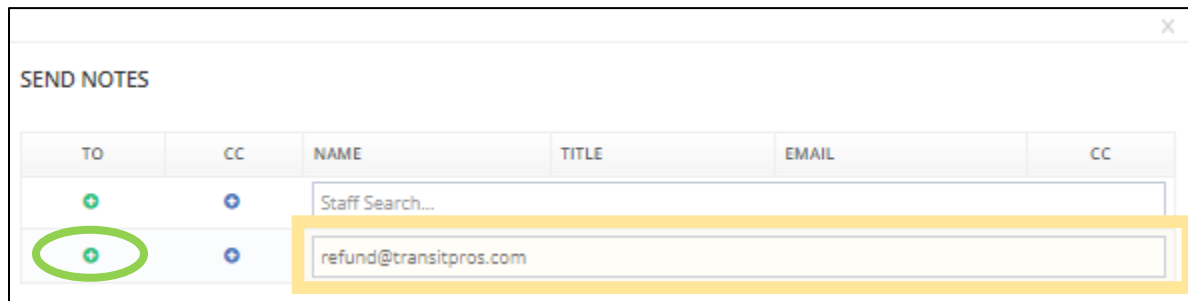Reasons and examples for internal note emails:

- ❖ Notify a manager or another department
- ❖ Requires follow up or further actions
- ❖ Customer refund requests
- ❖ After hour cancelations
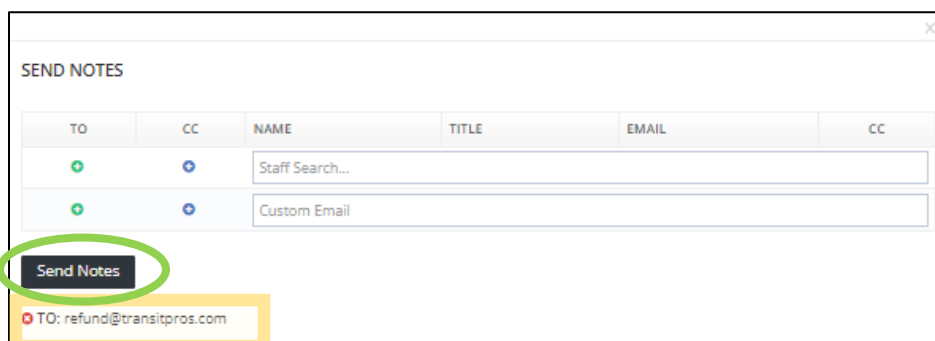
Once move note is added, select "Notify Staff"

- ➢ **Staff Search** - TP employees and departments
- ➢ **Custom Email** - manual entry
- ➢ **To+** - enter email and select to add as "To"
- ➢ **CC+** - enter email and select to add as "CC"

Once email address(es) is added, select "Send Notes"

Select "Reload notes tab" to return to notes or "X".

SEND NOTES

✔ Email message queued successfully

↻ Reload notes tab

Note will include the email notification and sent to address.

❌ ⬤ 01/13/23 11:20A | Customer refund needed
Customer cancelled service
Vendor did not leave
Customer due refund in the amount of $123.45

Email notification sent to: refund@transitpros.com

NOTES ⊕
01/13/23 11:20A | CUSTOMER REFUND NEEDED
Customer cancelled service
Vendor did not leave
Customer due refund in the amount of $123.45

Email notification sent to: refund@transitpros.com

Email title includes move # and "Lot" (the PO#)

Move Notes Move #2628964 Lot #310063

N   noreply@mg.transitpros.net
     To ERS Refunds

Christa Patterson has provided the following notes:

Customer refund needed

Customer cancelled service
Vendor did not leave
Customer due refund in the amount of $123.45

Sincerely,
Transit Pros
(877) 390-7673
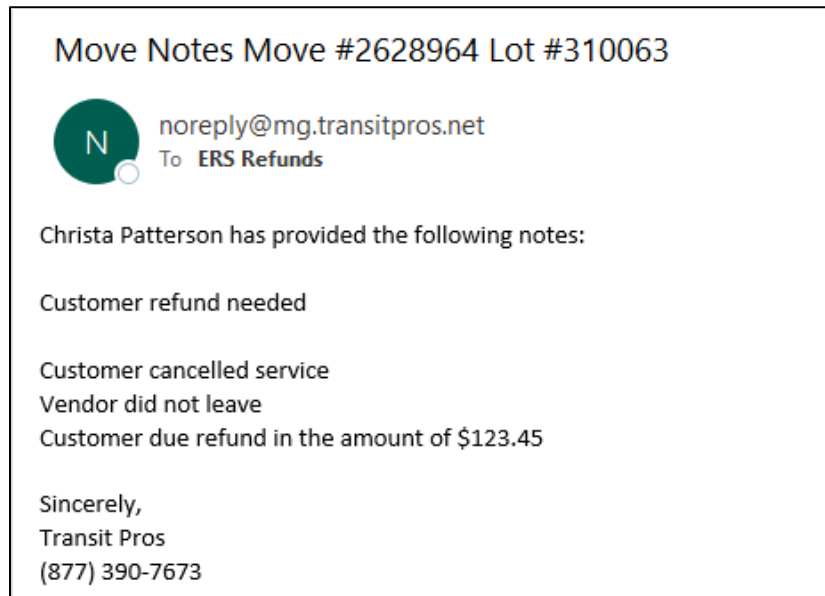
Confirm

Trip confirmations log the following move statuses: On scene, picked up and delivered (completed)

- ➢ Select the pencil icon at right of applicable confirmation
- ➢ Select Confirmation Type
  - o TP call to pick up location – customer confirmed
  - o TP call to vendor – vendor confirmed
  - o Vendor confirmed – Auto status when vendor confirmed through the vendor portal
- ➢ Enter "Spoke To" – name of who you spoke to
- ➢ Enter time (or as close to) of the status
  - o Select date on the calendar
  - o Select the hour under AM / PM
  - o Select the time (rounded every 5 min)
- ➢ Select Submit

Clients

ERS client's fall into three major categories. Each category is based on the client type. Each category or client type has its own protocol. Additionally, clients may have their own specific protocol that differ from other clients in the same category.

Client Types:

➢ <u>Motor Club Clients</u>: Typically, an add on feature of one's insurance policy or vehicle warranty program and most often mechanical breakdowns or services that do not involve physical damage. Service and coverage types will vary by client.

➢ <u>Trucking Line Clients:</u> Runs semi-tractor / trailers. These units may be transporting or scheduled to transport freight with time restraints so always be aware of the actual urgency level. Truck Line Clients are always fully covered for all services approved by client.

➢ <u>Insurance Company Clients:</u> Typically involves a physical damage claim with a claim #. Mechanical breakdowns are almost never covered under a claim # and should be treated as a Single Use Client (paying out of pocket) unless the insurance adjuster advises otherwise.

➢ Other: Clients that fall outside of the above categories.
  o Masters Transportation – Bus/transportation rental/leasing company
  o Helios – HVAC company
  o Copart Special – ERS events for Copart owned units and any ERS services needed by our tow vendors that encounter breakdowns while in tow on a Secondary Copart move.
  o Single Use Client – No post billing coverage, customer pays out of pocket

Motor Club Clients

❖ Intake will always be initiated by client rep and never the customer.
❖ Always confirm "coverage" and "loaded miles" on intake. Not all services are covered, and some may have coverage limits (mileage or dollar amount).
❖ Customer aka "member"

Motor club clients:

Motor Club Clients
AAA
ACG "Auto Club Group"
Agero / Swoop – DECLINE
Allstate Roadside Services "ARS"
CAA "AAA Quibec" (Canada)

Trucking Line Clients

- ❖ Intake is typically initiated by a truck line rep via email or phone. All service requests/service changes must be approved by the truck line and not just their driver.
  - o If the service is initiated by a truck driver, not a truck line rep – reach out to client rep for approval on the service requested.
  - o If the service is initiated by phone call – start an email chain to the client for updates (cc internal ERS dept.)
- ❖ All services are fully covered by truck line clients. Do not ask client for coverage.
- ❖ Customer aka "truck driver"
- ❖ Not all Trucking Companies are Transit Pros clients – **If request comes in from a non-TP client, treat as a Single Use Client**

Most frequent truck line clients:

Truck Line Clients
CoreTrans
Evans Delivery
Hub Group
J&R Schugel
Updike Logistics

Insurance Company Clients

- ❖ Intake will be initiated by phone from an insurance rep, insurance adjuster or the insured (customer).
- ❖ Requires a claim # and confirmation of coverage through an insurance adjuster
- ❖ If no claim # or adjuster confirmed not covered, service the customer as a Single Use client.
  - o National General > NGIC Single Use
  - o Sentry > Sentry Single Use
  - o All others > Single Use Client
- ❖ Customer aka "insured"

Insurance clients:

Insurance Company Clients
National General
Sentry
Northland Insurance
Nationwide
OOIDA

Other Clients

➢ Intake will be initiated by email or phone by a client rep, customer or our internal Secondary Dept.

➢ All Single Use clients must pay upfront via credit card for service before dispatch.

Other clients:

Other
Helios
Copart Special
Masters Transportation
Single Use Client