

**Groupe Robert**

**NEW PORTAL - CUSTOMER**

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User Guide

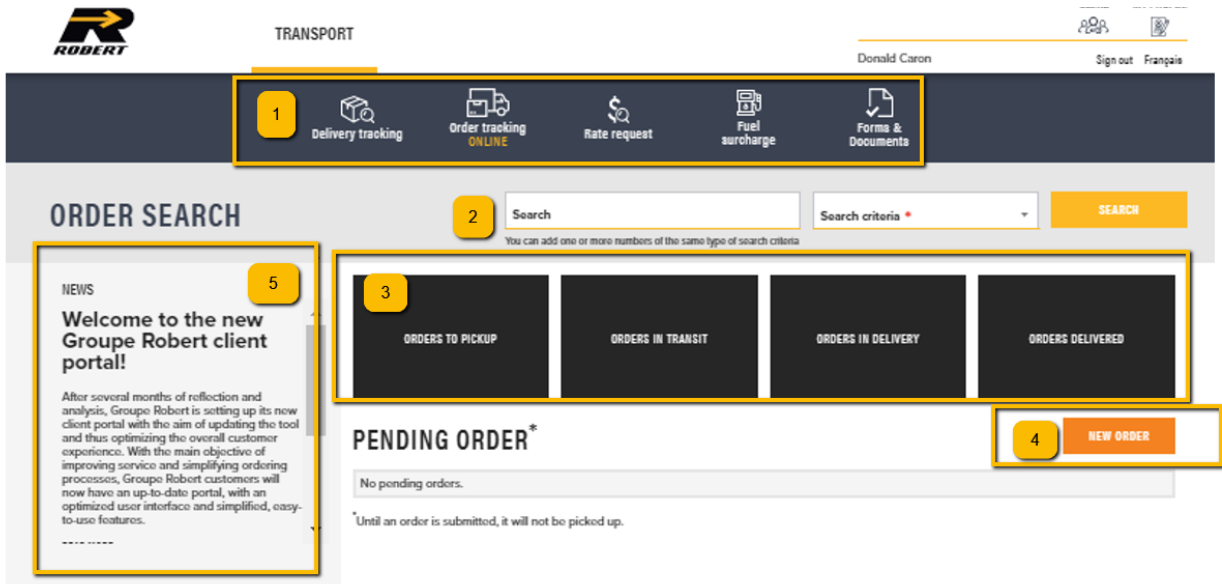
June 2021



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# NEW CLIENT PORTAL



## SECTION 1 : FUNCTIONALITIES

### AUTHENTICATION

- The username is now an emails address.
- Password : Must contain a minimum of 14 characters,one lower case, one upper case,one special character and at least one number.

### FUNCTIONALITIES

- **Delivery tracking** : Open the WebTracking in order to track all deliveries for the profil of the payer.
- **Online order management** : Track all orders created online from all the user combine.
- **Rate request & Fuel surcharge** : Open the Webtracking to select the desired option.

## SECTION 2 : RESEARCH

- Searches are possible by purchase order number, bill of lading, Robert reference, shipper or consignee.
- For a search by shipper or consignee: Enter at least the first 4 characters of the full name registered in the Groupe Robert database.
  - EX: The Robert Group Companies → The Companies  
Robert  
Robert Compagnies  
Robert Group

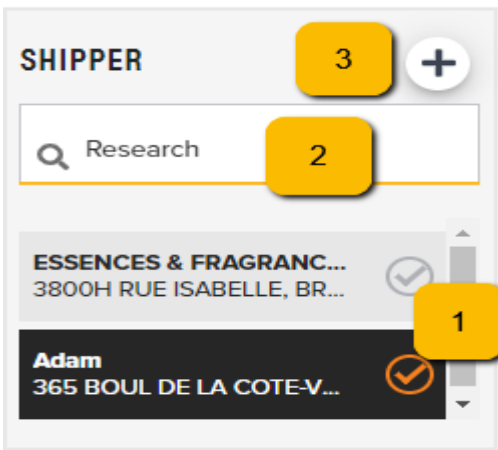
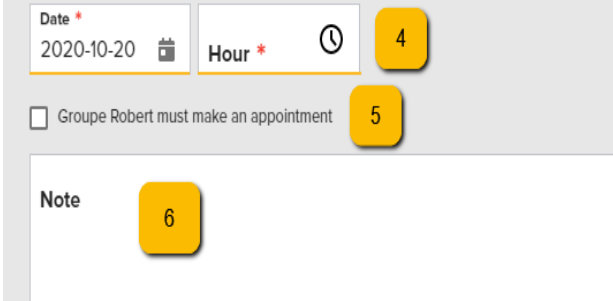

### SECTION 3 : SHORTCUT TILES

- **Pick up order** : prefiltered on pending orders.
- **Order in transit** : Pre-filtered on orders picked up, at a dock or in transit to a dock.
- **Orders in delivery** : Pre-filtered on orders loaded into a trailer and heading to the consignee.
- **Orders delivered** : Pre-filtered on orders that are completed.

### SECTION 4 : NEW ORDER CREATION

#### CREATE A NEW ORDER

#### Select a shipper

	<p>To enter a shipper :</p> <ol style="list-style-type: none"> <li>1- Search within Shipper history of the last 6 months;</li> <li>2- Search the history by customer name, address or city;</li> <li>3- Search in an enlarged customer bank (postal code &amp; civic # are mandatory); Click New to enter a new site;</li> </ol>
	<p>Availability of the merchandise:</p> <ol style="list-style-type: none"> <li>4- Enter the date &amp; time from which the merchandise is ready;</li> <li>5- Check the box if Groupe Robert must contact the shipper to book an appointment</li> <li>6- Note for the driver for instructions specific to the shipper.</li> </ol>
	<p>Click on <b>add a consignee</b> to continue with the destination of the order.</p>

## Select a consignee

**CONSIGNEE 1**
**DELIVERY DATE**
**IDENTIFICATION NUMBER**

**HERSHEY COMPANY  
DIV. BROOKSIDE**  
6780 AV CHOQUETTE  
SAINT-HYACINTHE, QC  
J2S 8L1  
CAN

**Marcel Caron**  
(450) 251-4029

**ESSENCES & FRAGRANCES  
BELL**  
3800H RUE ISABELLE,  
BROSSARD,  
QC J4Y 2R3  
#30427

**Unloading site**

Does the site have an unloading dock?  Yes  No

**Opening time**  
S Closed  
M 08:00 to 19:00  
T 08:00 to 19:00  
W 08:00 to 19:00  
T 08:00 to 19:00  
F 08:00 to 19:00  
S Closed

**Note (For information only)**

Estimated date of delivery: 2020/10/21

Date  **9**

Bill of lading number  **11**

Purchase order number

Customer reference nu...

Groupe Robert must make an appointment

Specific appointment

**COMMODITY**

COMMODITY

Click on **COMMODITY** to add the details of the merchandise.

- 7- To modify information on a shipper or a payer's profile, contact Groupe Robert by email at [supportweb@robert.ca](mailto:supportweb@robert.ca) ;
- 8- Note for delivery is displayed on the probill;
- 9- Estimated delivery date corresponds to Groupe Robert's transit time chart;
- 10- If required, specify a delivery date by selecting AM or PM or a time slot with or without an appointment #. Additional appointment charges may apply.
- 11- Bill of lading /purchase order and customer reference numbers are at the discretion of the user.

## Enter the Commodity

**MERCHANDISE**

**QUANTITY**

**12**

**Packing type**

**13**

**Description of the goods**

**14**

**DIMENSION**

Length  **15** × Width  **15** × Height

Stackable

**16**

CM PO

**CHARACTERISTICS**

Specific temperature?

Hazardous material

Total boxes  **17**

Optional

Total weight  **18**

KG LB

Declared value  **19**

- 12- Enter the quantity;
- 13- Enter the type of packaging ( box,crate,pallet,package)
- 14- Enter the description of the goods;
- 15- Entrer the dimensions and the unit of measurement ( CM, IN)
- 16- Click the + to add a commodity;
- 17- Optional:enter the number of total boxes;
- 18- Entrer the weight and the unit of measurement ( Kg,LB)
- 19- Important: Any value greater than \$ 4.41 per kilogram will be subject to an additional charge equivalent to three percent (3%) of the excess value of \$ 4.41 per kilogram, subject to a minimum of \$ 5.00 per shipment. The maximum value accepted is \$ 90,000 for merchandise loaded into a Carrier's vehicle.

<input checked="" type="checkbox"/> Specific temperature? <input type="radio"/> Frost protected <b>20</b> <input checked="" type="radio"/> At a specific temperature <input type="text" value="Temperature *"/> <input type="button" value="C"/> <input type="button" value="F"/> <p style="color: red;">The field is required.</p>	<p>20- Enter the temperature and the unit of measurement (C or F);</p>
<input checked="" type="checkbox"/> Hazardous material <small>Optional</small> <input type="text" value="Number of pallets *"/> <input type="checkbox"/> Consumer good <b>21</b> <input type="text" value="UN code *"/> <b>22</b> <input type="text" value="Weight *"/> <input type="button" value="KG"/> <input type="button" value="LB"/> <input type="text" value="Packing group"/> <input type="text" value="UN description"/> <input type="button" value="+"/> <input type="button" value="-"/> <b>24</b> <b>EMERGENCY CONTACT</b> <input type="text" value="Company name contact *"/> <input type="text" value="Emergency phone nu..."/> <input type="checkbox"/> Put in preference <input type="button" value="ADD A CONTACT"/> <b>27</b> <b>25</b> <b>26</b>	
<p>21- Enter the number of dangerous goods pallet;          22- Enter the UN Code, weight and unit of measure (kg, lb)          23- Enter the Packing Group and the appropriate description;          24- Click the + to add a commodity and - to remove it;          25- Enter the name of the company in case of emergency and its phone number;          26- Check the box to add this company to the user's profile          27- Click "ADD A CONTACT"</p>	
<input type="button" value="ADD CONSIGNEE"/> <input type="button" value="SUBMIT ORDER"/>	<p><b>Add a consignee:</b> for multiple destinations order;  <b>Submit order:</b> to send to dispatch;</p>

### Modify an order

- It is possible to modify a pending order by clicking on the "pencil" on the home page or in the list of orders created online;

### Delete an order

- o It is possible to delete a pending order by clicking on the "trash can" on the home page or in the list of orders offered online;

## SECTION 5 : NEWS


- Section regrouping Groupe Robert useful news for customers.

## SECTION 6 : MANAGEMENT OF USER

You can authorize an employee to access the portal. Give him rights so that he creates orders, manages his notifications, authorizes partners and modifies his customer profile. He can view the online tracking, rate request and fuel surcharge.

**ADD USER**

Q Research  
Search by username

Users ↑	Email	TELEPHONE	ROLE	Access	
Admin Gri	admingri@gcmi.ca	(418) 529-5899	Groupe Robert administrator	<input checked="" type="checkbox"/>	 

**\*\*\* Please note, only the Operational Administrator can modify the rights of company employees \*\*\***

To add a new user :

- Click "ADD A USER" and complete the mandatory fields in the "Contacts", "Workplace" and "Access" sections (user with or without creation of orders)

To deactivate an access:

- In the 5th column "Access": slide the hook to the left

To modify a user's access:

- Click on the "pencil"

To delete an access:

- Click on the "trash can"

## SECTION 7 : USER PROFILE

**PERSONAL INFORMATION**

doug Mat  
ESSENCES & FRAGRANCES BELL

Language \*  
English

mat@dicom.com  
(418) 321-4564  
None **28**

**AUTHENTICATION**  
CHANGE THE PASSWORD

**NOTIFICATION**  
BEFORE DELIVERY  
DELIVERY ARRIVAL CONFIRMATION

**PARAMETERS FOR ORDER ENTRY**

**UNIT OF MEASURE** **29**

**DIMENSION**  
 CENTIMETERS  
 INCH

**WEIGHT**  
 KILOGRAMS  
 LB

**TEMPERATURE**  
 CELSIUS  
 FAHRENHEIT

**MERCHANDISE**

**PACKING TYPE** **30**  
 BOX  
 CASE  
 PALLET  
 PACKAGE

**PACKING DIMENSION** **31**  
 Length: 48 x Width: 48

**HAZARDOUS MATERIAL**  
 Check here to enter the default 24 hour number if you are shipping hazardous material

Company name contact: \_\_\_\_\_  
 Emergency phone number: \_\_\_\_\_

**DEFAULT SITE**  
 To speed up the order entry, the default sites will be the first ones displayed in the list.

Shipper: None | Comignee: None | Payer: None **32**

28- Only the cell number can be edited. To modify any other information, contact

Groupe Robert by e-mail [equipeweb@robert.ca](mailto:equipeweb@robert.ca);

29- Enter the preferred measurement units;

30- Enter the preferred type of packaging;

31- The Length and width of a pallet can be saved to simplify order creation;

32- Check the box to enter the name and number of the company in case of emergency;  
Enter the shipper, consignee and payer preferences if desired.

## SECTION 8 : NOTIFICATIONS

### TYPES OF NOTIFICATION

#### Before delivery

- A first notice is sent as soon as the driver confirms his departure with the loaded trailer;
- A second notice is sent as soon as the driver is on the way specifically to make the delivery concerned by the notification;

#### Delivery confirmation

- The notification will be sent as soon as the driver confirms having completed the delivery;
- This notification will be sent only when the difference between the delivery time and the transmission time is less than 24 hours;
- If the delivery is made by a partner and Groupe Robert does not have the confirmation within 24 hours, no notification will be triggered.

### ACTIVATION FROM THE ORDER

EXPÉDITEUR Client 1 SHERBROOKE

CONSIGNATAIRE I Client 2 SAINT-DOMINIQUE

PAYEUR QUEBEC

➤ Enter the shipper and a consignee, then click on "ADD COMMODITY";

➤ A bell appears, click on the icon;

#### NOTIFICATION

Notification for Consignee 1 - PLOMB. ET POMPES PE... 35

To be notified or to notify the partners of this delivery you can select the type and mode of notification desired.  
The management of notification subscriptions is accessible by [My profile](#).

33	PERSON TO NOTIFY	SUBSCRIBER
▼	Notify me	✓
cplante@atlantispompe.com		
NOTIFICATION TYPE	EMAIL	
Before delivery	<input type="checkbox"/>	34
Delivery confirmation	<input type="checkbox"/>	

CANCEL SAVE

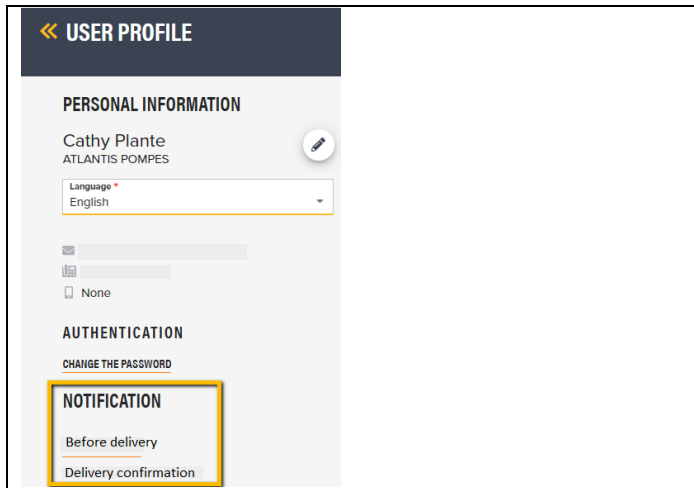
33- Click on the arrow

34- Select the desired subscription

35- If there are several consignees in the order, in this window you can switch from one to the other;

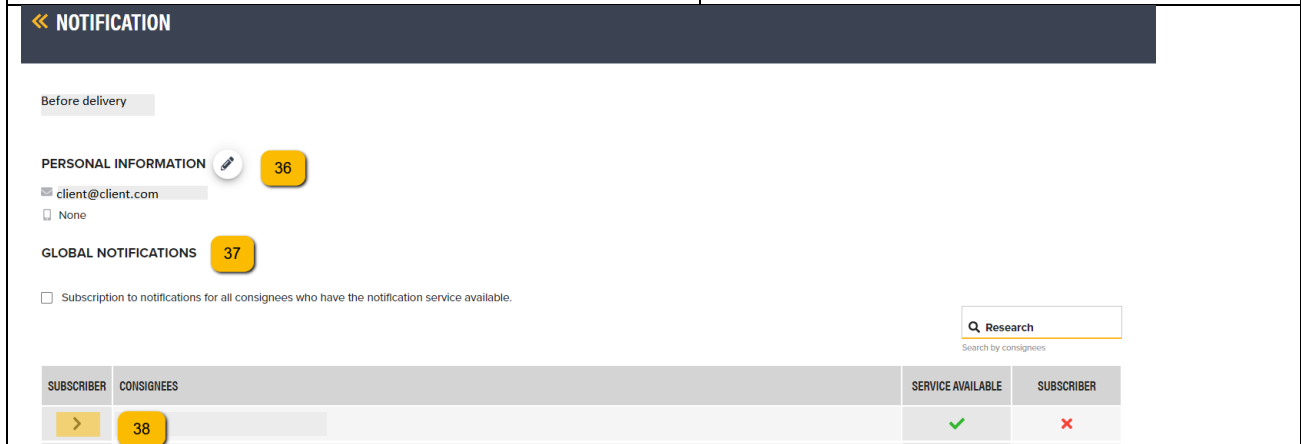


## ACTIVATION FROM THE PROFILE




At the top of the page, click "MY PROFILE";

Notifications are accessible in the left section;



Before delivery

PERSONAL INFORMATION  36

client@client.com

None

GLOBAL NOTIFICATIONS 37

Subscription to notifications for all consignees who have the notification service available.

Q Research  
Search by consignees

SUBSCRIBER	CONSIGNEES	SERVICE AVAILABLE	SUBSCRIBER
>	38	✓	✗

36- To modify the cell phone number

37- To activate global notifications: they will be activated by default on all delivery sites

It is necessary :

- Check the box
- Select the notification mode (upcoming SMS)
- Click "YES" to "SUBSCRIBE TO ALL CONSIGNANTS"

38- To manually select the sites to subscribe to, you must:

- Click on the down arrow of the desired site
- Select the notification mode (upcoming SMS)
- Click "CONFIRM"
- Click "CANCEL" to close the site and make a next selection

**Service available:**



A site generally served by Groupe Robert. Notifications are available.



A site generally served by a Groupe Robert partner whose activation is not possible.