Groupe Robert

WEB PORTAL - CUSTOMER

User Guide

Support WEB Team

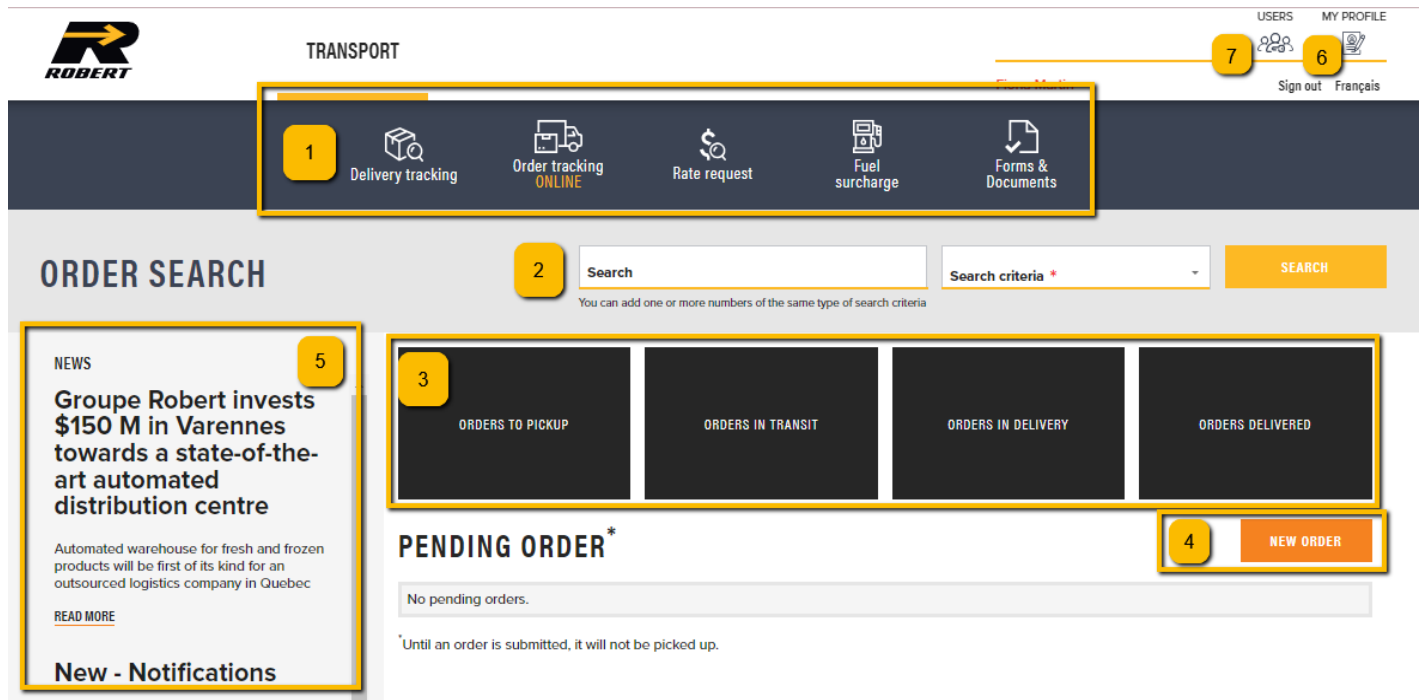**06/09/2023**

Table of contents

1.0 AUTHENTIFICATION

🖐 An e-mail address now becomes the username.
🖐 The password must contain a minimum of 14 characters: one lower case, one upper case, one special character (! @, # …) and at least one number.

2.0 HOME PAGE

Section 1 – Tabs

🖐 Delivery tracking: Open WebTracking to track all deliveries from the user's paying profile;
🖐 ONLINE order management: Track all orders created online, depending on user;
🖐 Rate request: Open WebTracking to track all deliveries from the user's paying profile.

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
The following examples do not work: Robert, Robert Enterprises, Robert Group

Section 3 – Shortcut Tiles

↳ Pickup order: Display of submitted or assigned orders;

↳ Order in transit: Display of orders picked up at a dock or in transit to a dock;

↳ Delivery order: Display of orders loaded in a trailer and in the direction of the consignee;

↳ Order delivered: Display of orders for which the delivery is completed.

Section 4 – New online order

1. Enter the shipper
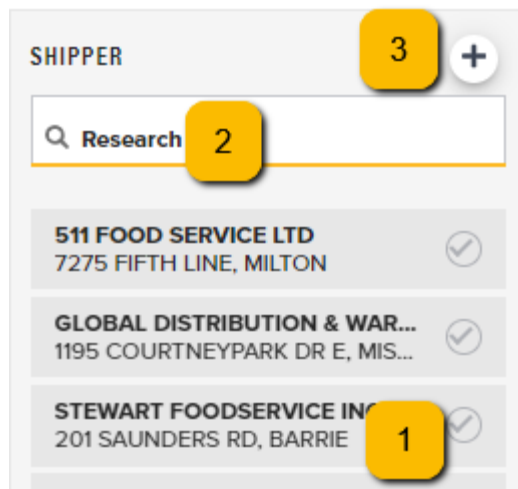
↳ (1): Shippers history of the last 6 months;

↳ (2): Search history by customer name, address or city;

↳ (3): Search in an extended customer bank (postal code & civic number required). Click New to enter a new site.

1.1 Enter a new shipper/new consignee

↳ Start by entering the details of the new shipper, then click on next in the lower right corner.

↳ Answer the loading questions, then click on next.

↳ In the availability tab, indicate the opening hours of the sender.

❖ Click the trash can icon to delete data from an entire row.

❖ To copy opening hours from one day to another, select the interval at the end of a line (Choose between daily, weekly or weekend), then press the copy icon. The data entered in the line will appear on the other lines automatically.

2. Enter availability of goods

> ⇨ (4): Enter at which date & time the goods are ready;
> ⇨ (5): Check for *Groupe Robert* to contact the shipper to schedule an appointment;
> ⇨ (6): Note to the driver.

ADD CONSIGNEE Click on "ADD A CONSIGNEE".

3. Enter a consignee
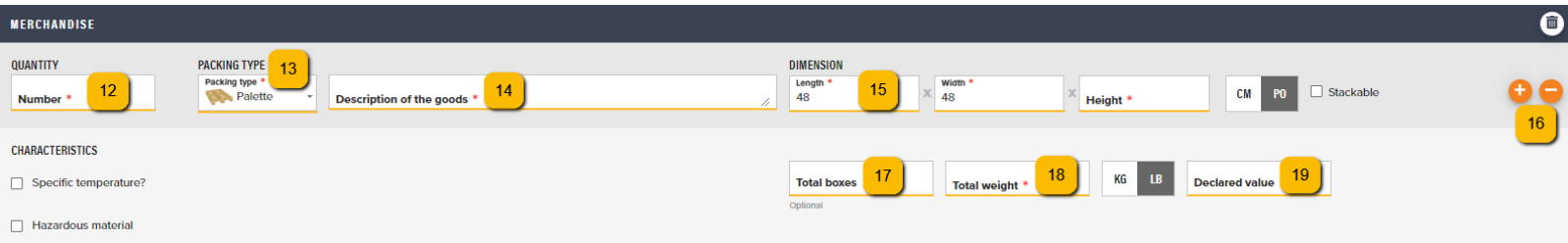
> ⇨ (7): To modify information in the consignee's profile or payer profile, contact *Groupe Robert* by email supportweb@robert.ca;
> ⇨ (8): Notes for delivery are displayed on the probill to inform the driver;
> ⇨ (9): Estimated delivery date corresponds to *Groupe Robert's* transit time charter;
> ⇨ (10): Specify a delivery date by selecting AM, PM or a time slot with or without an appointment
> Please note that when confirming specific delivery times, *Groupe Robert* will not contact the consignee(s) to schedule an appointment.
>
> ⇨ (11): Bill of lading / purchase order numbers are at the discretion of user. The customer reference number must be completed. Please note that each reference number must be separated by a comma or a semicolon. Avoid the hyphen.

ADD COMMODITY Click on "*ADD COMMODITY*"

4. Enter the goods

- ☞ (12): Specify quantity;
- ☞ (13): Specify type of packaging (box, crate, pallet, package);
- ☞ (14): Provide description of goods;
- ☞ (15): Specify dimensions and unit of measurement (cm, in);
- ☞ (16): Click on + to add an additional merchandise and - to remove some;
- ☞ (17): Specify number of boxes (optional);
- ☞ (18): Specify weight and unit of measure (kg, lb);
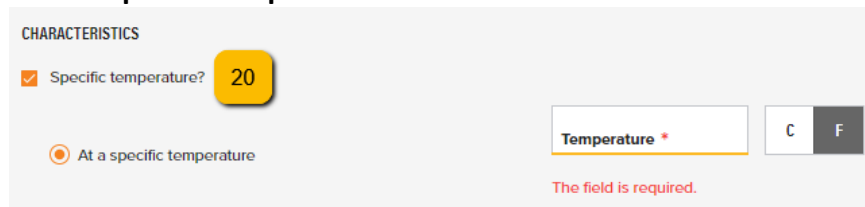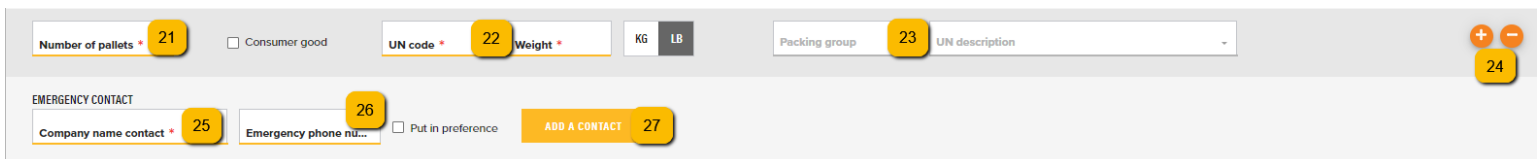- ☞ (19): Any value greater than $4.41 per kilogram will be subject to an additional charge equivalent to three percent (3%) of the excess value of $ 4.41 per kilogram, subject to a minimum of $5.00 per shipment. The maximum value accepted is $90,000.00 for merchandise loaded into a Carrier's vehicle.

5. Specific temperature

- ☞ (20): Specify temperature and unit of measurement (C or F);

6. Hazardous materials

- ☞ (21): Specify number of pallets containing hazardous material;
- ☞ (22): Specify *UN Code*, weight and unit of measure (kg, lb);
- ☞ (23): Specify *Packing Group* and provide appropriate description;
- ☞ (24): Click on + to add an additional merchandise and - to remove some;
- ☞ (25): Specify name of emergency company and telephone number;
- ☞ (26): Check to add this company to the user's profile;
- ☞ (27): Click "*ADD A CONTACT*"

7. Submit the order by clicking on the button

After entering the information for a first consignee, you can:

- ✋ Add an additional consignee;
- ✋ Submit order.

8. Changing an order

It is possible to make changes to a pending order by clicking the "*pencil*" tool of the targeted order, either on the home page or in the list of orders created online.

Order Submitted: Modification of shipper, consignee and merchandise information possible.

Scheduled Order: Modifying sender information is no longer possible. Call customer service to change the information if necessary. Modification of the information of the consignee and goods still possible.

On the way: Modifying shipper and consignee information is no longer possible. Call customer service to change the information if necessary. Modification of the information concerning the goods still possible.

Loading completed: The command is completed. No modification possible.

9. Delete an order

It is possible to delete a pending order by clicking the "*trash*" tool of the targeted order, either on the home page or in the list of orders created online.
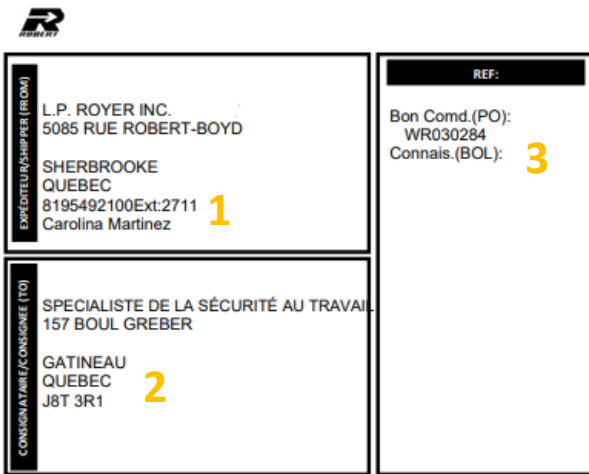
10. Barcodes

For a pallet	1 barcode per pallet
For a box/ crate	1 barcode per case/box
For a package EX: Pipes	For individual units, it's important to clearly identify each element. One barcode per unit will be provided. When the units are attached in the same set (several pipes in a single bundle type package), only 1 barcode will be issued to you.

Two types of formats

↳   Paper: Barcodes can be printed on any type of conventional printer.

↳   Label: Allows you to print self-adhesive labels for those who have the tools.

Document content

↳   (1) : Shipper's Information

↳   (2) : Consignee Information

↳   (3) : PO and bill of lading (BOL) numbers

↳   (4) : Number of units to pick up

↳   (5) : Pickup number

↳   (6) : Number of consignees

On the Web
- ✍ Creation of an online order as usual.
- ✍ A pop-up message will inform you to print the barcodes. By selecting the desired option, a second window will open on your browser with the documents.
- ✍ At any time, you have you can return to the Online Order Management tab, to press the printer icon corresponding to the desired pick-up and be redirected to the barcodes or the BOL.

Special cases
- ✍ When you modify your web order using the pencil tool, you must print again the barcodes with the corrected information. The pop-up will appear every time an order is submitted, whether it is a new order or a modified order.
- ✍ In a situation where the merchandise must be picked up at another shipper's site, you must email the barcodes by downloading them to your computer. Then send them by email to the shipper for him to place them before your order is taken care of by one of our drivers.

The barcodes
You must print and stick the barcodes on the goods before the driver arrives.
- ✍ Instructions on the document will guide you.
- ✍ Use of industrial tape only. No Scotch 3M type adhesive tape will be tolerated. Possibility of using plastic pouches.

Section 5 – News

Gathers news of *Groupe Robert* useful for your order taking.

Section 6 – User management

USERS   DELEGATES

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

🔍 Research
Search by username
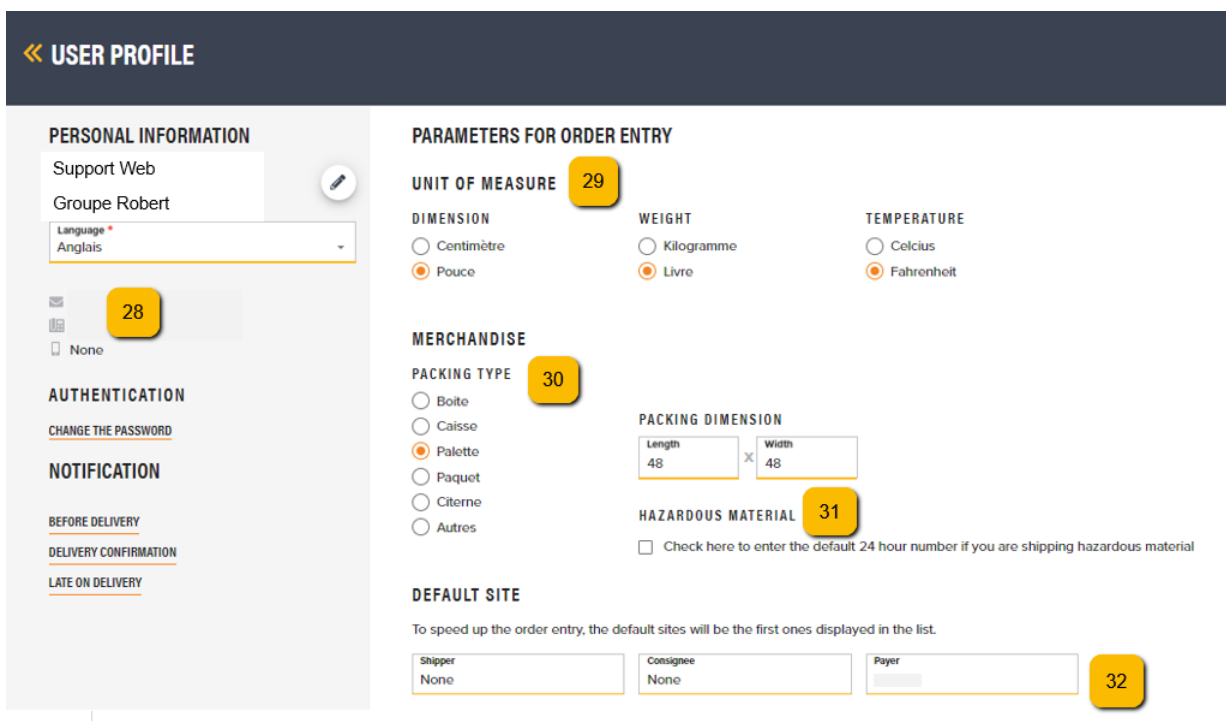
USERS ↑	EMAIL	TELEPHONE	ROLE	ACCESS	

- ✍ Operational Administrator: Role with the most functions, each company must have at least an operational Admin. He can himself create the accesses of his employees and those of the delegates;
- ✍ User without order taking: For order tracking and all portal functions excluding that of creating an order.
- ✍ User with order taking: For order tracking and all portal functions including creating an order.

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

- ➬ To add a new user: Click "*ADD A USER*" and fill out the mandatory fields in the "*Contacts*", "*Workplace*" and "*Access*" sections (user with or without taking an order);
- ➬ To deactivate an access: In the 5th column named *"Access"*, slide the checkmark to the left;
- ➬ To modify a user's access: Click the pencil tool, then make the desired changes.
- ➬ To delete an access: Click the trash can icon.

Section 7 – User Profile

- ➬ (28): Only phone numbers (cellphone / work) can be edited by clicking the pencil icon. To modify any other information, contact *Groupe Robert* by email supportweb@robert.ca;
- ➬ (29): Possibility to enter the preferred measurement units. These will be pre-established when ordering;
- ➬ (30): Possibility to enter the type of packaging preferably pre-established when ordering. The length and width of a pallet can be saved to simplify ordering;
- ➬ (31): Possibility to check to enter name of the company in case of emergency, as well as the telephone number.
- ➬ (32): Ability to enter shipper, consignee and payer preferences if desired.

Section 8 – Notifications

Types of notification

1) Before Delivery
- A first notice will be sent as soon as the driver confirms his departure from the shipper with the trailer loaded;
- A second notice is sent as soon as the driver is on his way to specifically make the delivery specified as per notification.

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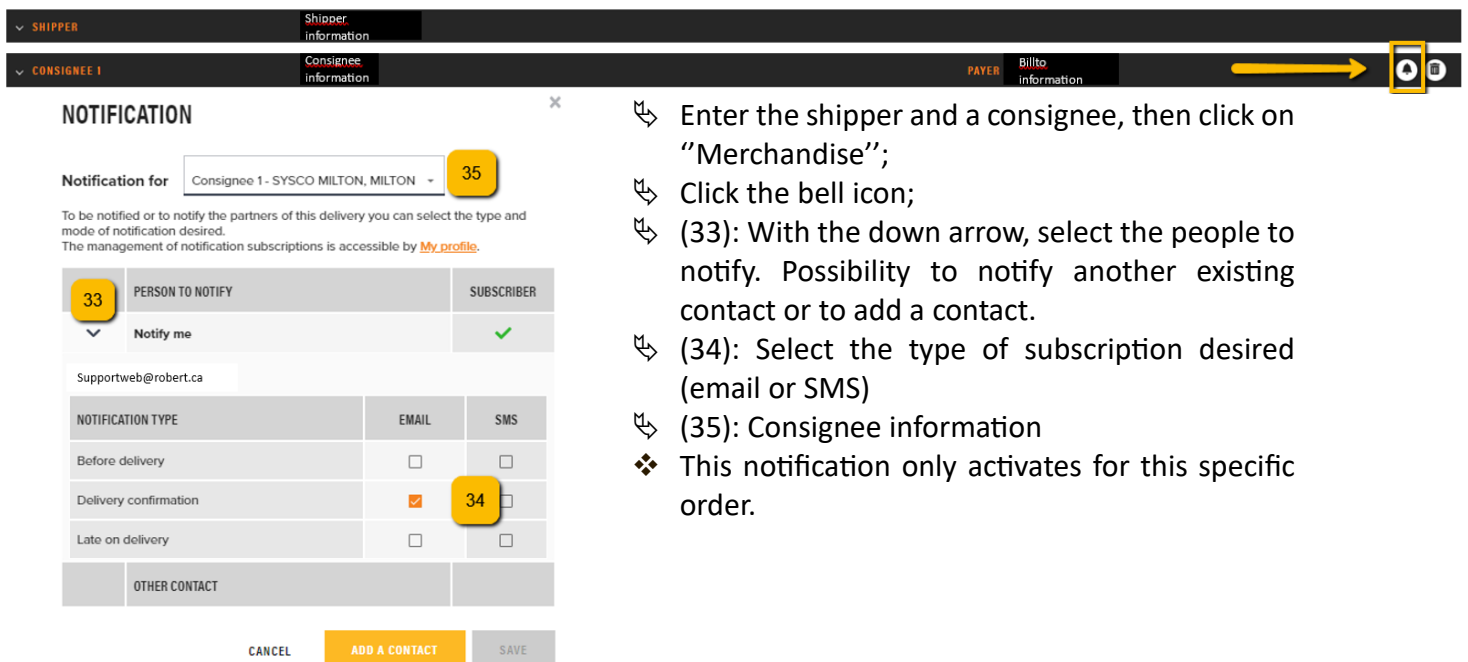- A notification will be sent as soon as the driver confirms having completed the delivery specified as per notification;
- This notification will be sent only when the difference between the delivery time and the transmission time is less than 24 hours;
- If the delivery is made by a partner and *Groupe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

3) Late delivery
- When the estimated time of delivery changes in an interval of more than 15 minutes, a notification will be sent to you to notify you or the consignee.

Two easy ways to activate

1) Activation on command

- Enter the shipper and a consignee, then click on ''Merchandise'';
- Click the bell icon;
- (33): With the down arrow, select the people to notify. Possibility to notify another existing contact or to add a contact.
- (34): Select the type of subscription desired (email or SMS)
- (35): Consignee information
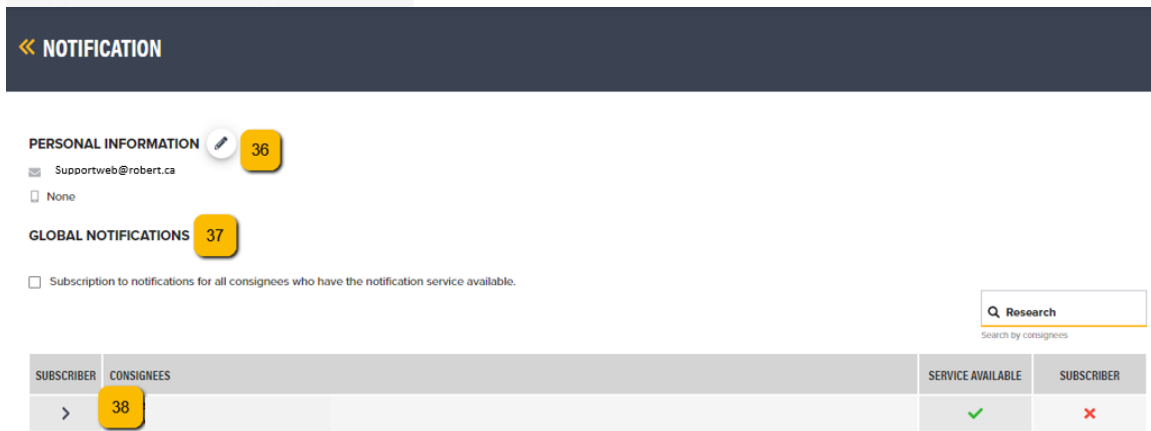- ❖ This notification only activates for this specific order.

2) Activation in the user's profile

AUTHENTICATION

CHANGE THE PASSWORD

NOTIFICATION

BEFORE DELIVERY

DELIVERY CONFIRMATION

LATE ON DELIVERY
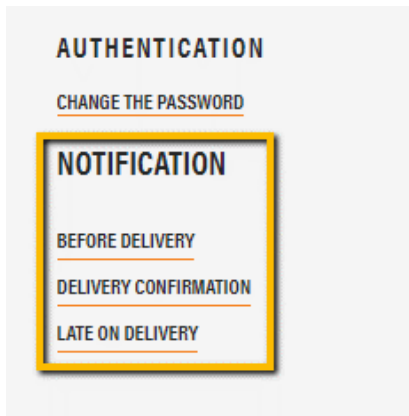
☞ In the upper right corner of the page, click the *My Profile* option.

☞ In the lower left section, access notifications.

Notifications will activate for all orders placed through the web portal.

« NOTIFICATION

PERSONAL INFORMATION ✏ **36**

✉ Supportweb@robert.ca

▢ None

GLOBAL NOTIFICATIONS **37**

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

🔍 Research

Search by consignees

SUBSCRIBER	CONSIGNEES		SERVICE AVAILABLE	SUBSCRIBER
›	**38**		✓	✗

☞ (36): Possibility to change the phone number receiving notification;

☞ (37): To enable global notifications to all delivery sites, check the box in the Global Notifications section. Select the desired notification mode, then click on "YES" to "*SUBSCRIBE TO ALL CONSIGNEES*".

☞ (38): Ability to manually select sites to subscribe to. To do so, click on the down arrow of the desired site, then select the desired notification mode (SMS or email). Click on "*CONFIRM*" or "*CANCEL*" to close the site and make a next selection.

☞ By clicking on the down arrow, it is also possible to add another contact for this site only. To do this, click on the + sign, then add the necessary information. By clicking on "SAVE", the new contact will receive an activation message by email and / or SMS.

☞ When the new contact accepts the activation messages, the capsule turns green. If refused, this capsule will turn red.

✓   Site generally served by *Groupe Robert*. Notifications are available.

✗   Site generally served by *Groupe Robert* partners. Notifications are not possible.