



POWERING POSSIBILITY



HAULIER MANAGEMENT

A quick reference guide for Haulier functions on the Portal.
Our first step in digital transformation.

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1. On-boarding process flow

The below process defines the steps to complete for the Haulier on-boarding process.



2. Haulier select process flow

The below process defines the steps to follow when a customer selects the Haulier to transport their order.



3. Login into the Self-Service Portal

To access the Exxaro Portal, follow the below steps;

1. Open your internet browser
 - a. Chrome
 - b. Internet Explorer (Latest Version)
 - c. Edge
2. Enter the following site address:
<https://exxaro.microsoftcrmportals.com>
3. On the top right corner of your screen, click on **Sign In**
4. Enter your **Username** and **Password** then click on **Sign In**

4. Redeem Invitation

When a Customer invites the Haulier to register, the Haulier will receive an email with a link to redeem the invitation. Follow the below steps to complete the redemption;

1. From the redemption email you received, click on the link provided
 - a. If your browser does not open, then copy and paste the link into your browser.
2. Once your browser opens you will be presented with a screen containing your redemption code (Do not remove the code), click on register.
3. Next, you will be prompted to create a Username and Password
4. Click on Register to complete the redemption process

Password Hint: Your password should be a minimum of 6 characters, should contain at least 1 uppercase, 1 lowercase and 1 number. Below are some examples;

✗ INCORRECT: mypassword

✓ CORRECT: MyPassword1

5. Account Setup

Once you have created your username and password and have access to your profile, the next step is to confirm that your account details have been entered correctly and are complete.

To check your Haulier Profile, follow the below steps;

1. From the main menu, select **Haulier Management**, then
2. Select **Manage Profile**.
3. Click on your account name to access your account.
4. In the first section, check that your company information is complete and correct.
5. Should you require additional access to Mine Sites then, In the second section, select **Apply for Access** next to each Mine Site where you would like to apply for access to.
6. In the third section, you will see pending/approved/declined Mine Site Certificates.
7. In the fourth section, you will see a list of documents that you are required to upload prior to obtaining access to a Mine Site.
 - a. This section will also contain the documents for all the Drivers, Trucks and Trailers associated with your company.
8. Finally, to save your changes, scroll to the bottom of the page to and click on **Submit**.

6. How to add a Contact (User) to your Profile

By adding additional contacts to your Profile you may assign permissions to each user to perform functions on your Profile. To add a Contact (Portal User) follow the below steps;



1. From the main menu, select **Haulier Management**
2. Select **Manage Contacts**
3. From the Contact list, select **Add Contacts**
4. Complete the details of the contact
5. Assign security permissions based on the functions you would like to grant by setting the permission to **yes**

Once you have added the contact they will receive an email which will contain a link to redeem their portal invitation. The user will need to click on the link, create a username and password then select Update once they have accessed their profile.

The Portal User will also receive an email confirmation of their permissions. The Primary Contact from the Haulier Company may add and remove permissions at any time.

7. Change Portal User Permissions

From time to time the administrator or Primary Contact from the Haulier Company may wish to change the permissions of an existing Portal User as well as deactivate a user's access completely. To Change the Users Permissions or deactivate the user, follow the below steps;

1. Change the Portal Users Permissions
 - a. From the main menu, select **Haulier Management**
 - b. Select **Manage Contacts**
 - c. On the right of the contact which you would like to change their permission, click on  then click on **Update**
 - d. In the Contact Security section, where you would like to remove permissions, select where marked **YES** and change the option to **NO**
 - e. Where you would like to grant permission, select the permission and change the setting to **YES**
 - f. Once you have completed the changes, click on **Submit** to effect the change
2. Deactivate the Portal User completely
 - a. From the main menu, select **Haulier Management**
 - b. Select **Manage Contacts**
 - c. On the right of the contact which you would like to change their permission, click on  then click on **Update**
 - d. On the top right of the contact details, change the Deactivate contact option from **No** to **Yes**
 - e. Click on **Submit** to effect the change
 - i. The users Portal Access is revoked.

8. How to Apply for Mine Site access




Before a Driver, Truck or Trailer can be considered to be approved, the Haulier Company should be approved at the Mine Site. For each Mine Site that the Haulier would like to operate at, the company would require approval from each Mine Site separately. To apply for access to a Mine Site follow the below process;

1. From the Main Menu, select **Haulier Management**
2. Select **Manage Profile**
3. On the right of your profile, select then select Update Profile
4. Scroll down to the **Mine Sites** section
5. Using the Dropdown next to the Mine Site, change the option to **Apply for Access**.
6. Scroll to the bottom of the page and select the **Submit** button to action your request.

Once your access to the newly added Mine Site has been approved, you may start applying for access for your Drivers, Trucks and Trailers.

9. Document Expiry List

The list displays documents required by each haulier company to remain compliant. From this view, you can see a list of the documents for your company as well as the expiry dates. This list should be maintained by the Haulier to ensure that expired documents are timeously replaced as and when required. Should any of the company documents need to be updated or replaced, this should be done as follows;

1. From the main menu, select **Haulier Management**
2. Select **Manage Profile**
3. Next, to the company name, select  then select **Update**
4. Scroll down to the **Haulier Document Management** section
5. To sort the list of documents by the expiry date in either an ascending or descending order, simply click on the expiry date column heading.
6. To update or replace a document, click on the  to the right of the document you wish to update.
7. Then select **Update/Upload Document**
8. In the popup window, you are able to add a new file or replace an existing file. To replace an existing file, select the  to the right of the existing file. In the dialogue box, select the new file to replace the existing file with.

10. Truck and Trailer List

Once the Truck or Trailer has been approved, they will be accessible to be added to a Dispatch Record. To add your fleet of Trucks and Trailers to your account, follow the below steps;

1. From the main menu, select, **Haulier Management**
2. Then select **Add Truck/Trailer**
3. On the right of your screen, select **Add Truck/Trailer**
4. Complete the Truck and Trailer Section
5. On the same form, select which Mine Site you would like to apply for access to for the Truck or Trailer that you are loading by setting the option next to the Mine Site name to **Apply for Access**
6. Click on **Next**
7. On step 2, a list of the required documents will be displayed which are required for you to upload for the Truck/Trailer to be approved.
Click on next to the document you would like to upload then select **Upload Document**.
8. Upload all the required documents, then
9. Click on **Submit** to complete your submission.

Should you not have all the documents required on hand while adding the Truck or Trailer you may still submit and later return to complete uploading the outstanding document by navigating to Truck and Trailer List (see Haulier – Updating Truck and Trailer). Please note that the Mine Site coordinator will not consider approving the Truck or Trailer until all the required documents have been uploaded.

Once a Truck/Trailer has gone for an inspection at the Mine Site and thereafter approved, a QR Code will be printed and should be displayed on the applicable Truck/Trailer.

11. Updating a Truck or Trailer

During the process of adding a Truck or Trailer, you may not have completed uploading the documents required for approval or you may need to replace expired documents. To update the Truck or Trailer record or document, follow the below process;

1. From the main menu, select **Haulier Management**
1. Then select **Truck and Trailer List**
2. On the right of the Truck or Trailer, select then select **Update Truck & Trailer Details**
3. Update the details where required or
4. To upload or replace select next to the document name then select **Update/Upload Document**
5. Enter the expiry date of the document, select the file to attach from your local device, then click on **Update** to apply your Upload or Update.
6. Click on **Submit** to affect your changes.

12. How to add a Driver

As a Haulier, you are required to load your drivers and request authorization per driver to access each Mine Site. To add an additional driver, follow the below steps;


1. From the main menu, select **Haulier Management**
1. The select **Add Driver**
2. From the Driver list, click on **Add Driver**
3. Step 1
 - a. Complete the Drivers details
 - b. Select **Apply for Access** at each mine site where the driver would need access to
4. Step 2
 - a. Upload the required documents
5. Click on Submit to complete the process

Once you have completed the above steps, a Mine Site Certificate is created and sent automatically to the Logistics Coordinator at the Mine Site/s for Approval.

Once the Mine Site Certificate is Approved/Declined, you as the Primary contact of the Haulier Company will receive an email confirmation.

13. Create a Dispatch Record

Once a customer has created an Order and selected your company for transportation, you would need to create a **Dispatch Record/s** for the order. The **Dispatch Record** defines a unique record for the Truck, Trailer, Driver and Quantity. The user would either need to create a single **Dispatch Record** for the entire order or multiple **Dispatch Records** where the load is split over several trucks, trailer and drivers. To create a **Dispatch Record**, follow the below process;

1. From the main menu, select, **Haulier Management**
2. Then select **Haulier Select**
3. On the right of the **Order**, select  then select **Details/Dispatch** record
4. Scroll down to the **Dispatch Record** section and click on the **Create Dispatch** button
5. Add a Driver, Truck, Trailer/s and the Tonnage to Load.
6. Enter a date range for the expected delivery.
 - a. The date range should be within the current calendar month.
7. Click on **Submit**

Repeat these steps until you have created enough Dispatch Records to fulfil the Order.

14. Schedule Trips

In the previous step, you created a Dispatch Record which essentially means you have assigned a Driver, Truck, Trailer and tonnage to be hauled within a certain period, however, you have not defined the actual trips. The Dispatch record defines the period in which the delivery should take place and the Schedule Trips defines which trips will take place within the defined period of the Dispatch Record. Once the Dispatch record is created, next you need to access the Dispatch Record and add the Scheduled Trips. Follow the below process to complete this action;


1. From the Main Menu, select Haulier Management
2. Select **Haulier Select**
3. On the right of the **Haulier Select** Record, select then select **Details/Dispatch Record**
4. Scroll down to the Dispatch Record section, on the right of the Dispatch record for which you would like to schedule trips, select then select **Edit Dispatch**
5. Scroll down to the Schedule/Trip section
6. On the right of the list view, click on **Create Schedule/Trip**
7. Enter the **Valid From** and **Valid To** Dates
8. Enter the tonnage amount to be allocated for this scheduled trip
9. Enter the **Collection date** which is the date the load will be collected from the Mine Site (Only if the schedule is for a specific date otherwise leave the field blank)
10. Lastly, add any relevant comments
11. To complete the schedule, click on **Submit**

Once the Scheduled trip/s have been created they will need to be approved by the Mine's Logistics Coordinator, once approved you will be able to print the loading advice ticket for the scheduled trip.

15. Loading Advice

Once a Scheduled Trip has been approved by the Mine's Logistics Coordinator, the user will be able to print a Loading Advice.

For each scheduled trip that is approved, a Loading Advice is auto-created by the system. In order for a driver to collect the order that was assigned to them, the **Loading Advice** should be printed so that the driver can gain access to the Mine Site and Collect the Order. To print a **Loading Advice**, follow the below instructions;

1. From the main menu, select **Haulier Management** then
2. Select **Loading Advice**
3. To the far right of the Loading Advice for which you would like to print the ticket, click on  then select **Details**
4. Scroll to the bottom of the Loading Ticket, then click on the **Blue Button** to print the ticket.

16. Dispatch Movement List

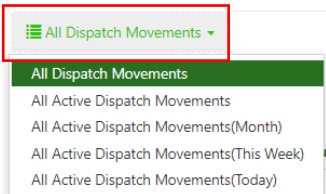
A dispatch movement list displays a list of loads that have been dispatched against your order. To view the list of Dispatch Movement records, follow the below steps;

9. From the main menu, select Haulier Management, then
10. Select Dispatch Movement List

These above steps guide you to the active Dispatch Movement records. Should you wish to toggle between the different filtered views, such as;

1. All Dispatch Movements
2. All Active Dispatch Movements
3. All Active Dispatch Movements (Month)
4. All Active Dispatch Movements (This Week)
5. All Active Dispatch Movements (Today)

Use the view selector on the left of the view to select how you would like the list to be filtered by clicking on the following;



17. General – Complaint Management

Should you have a complaint/query against an existing order or general query, from the Portal the Customer/Haulier may lodge a complaint. To lodge a complaint, follow the below process;

1. From the main menu, select Complaint Management
2. On the dropdown, click on Complaint Management
3. To create a new complaint, click on the **Open a New Complaint** button
4. Complete the details on the form
5. Click on **Next**
6. Upload the required documents relating to your complaint where applicable
7. To submit your complaint, click on **Submit**

Once your complaint has been lodged, the Portal User will have access to the progress of the query directly from the portal whereby the user can see the status of the query/complaint as well as send and receive communication.

To view the status of your complaint, follow the below steps;

1. From the main menu, select **Complaint Management**
2. Then from the dropdown select **Complaint Management**
3. Below you will see a list of existing open cases, under the Status Reason heading, this will display the current status.

Once the Complaint has been resolved, the complaint will be removed from your default view and be placed under your closed Complaints view. To switch between Open, closed views, please use the view selector on the Complaint Management Screen as shown below;



1.

While your complaint is open, an Exxaro user assigned to your Complaint may load comments or questions regarding your query. To view/add a new comment to an existing complaint, follow the below steps;

1. From the main menu, select **Complaint Management**
2. On the dropdown select **Complaint Management**
3. On the right of the Open case which you would like to add a comment or read a posted comment, click on then select view details
4. Below the Complaint details, locate the timeline. All comments or questions posted will be recorded here.
5. To add a new comment, click on the **Add Comment** button
 - a. Enter the details of your Query/Question
 - b. Attach a file if necessary
 - c. Click on **Submit** to complete adding the comment.

18. General – Download

The download TAB provides the downloadable applications for a Cash or Credit account. To download either application form, follow the below instructions;

1. From the main menu, select **Downloads**
2. Then select the document you wish to download.
3. The document will then download to your device.

19. General - Profile

Your Profile page is your personal details page, from this page you will be able to update your personal information as well as update your access details. To view/update your personal details, follow the below instructions;

NB! The user must be logged in to perform this action.

1. From the main menu, click on your **name** on the top right corner, then
2. On the dropdown, click on **Profile**
3. Update where required, then at the bottom of the page, click on the **Update** button to save the changes.

20. General – Change your Password

A user has the ability to change their password from within their personal profile. To change your password, follow the below steps;

NB! The user must be logged in to perform this action.

1. From the main menu, Select your **name** on the top right corner of your screen
2. Then select **Profile**
3. Once the profile page has loaded, on the left menu, select **Change Password**
4. In the **Old Password** Field, enter your current password
5. Then in the **New Password** field, enter the new password
6. Lastly, confirm the password by re-entering your new password into the **Confirm Password** field.
7. Finally, click on **Change Password** the effect the change.