



POWERING POSSIBILITY



CUSTOMER MANAGEMENT

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

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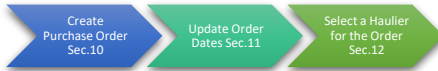
1. On-boarding process flow

The below process flow defines the steps to complete the customer on-boarding process.



2. Purchase process flow

The below process defines the steps a customer should follow to create a purchase order.



3. How to register as a customer

All Customers are required to create an account on the Customer Self-Service Portal in order to manage their Profiles, register a Haulier(s), add additional contacts and manage/create purchase orders and scheduling Hauliers. The below steps show the customer creation process.

1. Open your internet browser (Chrome or Internet Explorer)
2. Enter the following site address:
<https://exxaro.microsoftcrmportals.com>
3. Click on **Sign In** on the top right of your screen
4. Click on the Register TAB above the Sign In Section
5. Enter your **Email Address**, Create a **Username** and **Password** and then click on **Register**.
6. Read through the terms and conditions
7. To accept the Terms and Conditions, check the Tick Box at the end of the T&C's to indicate that you have accepted, then
8. Click on **Continue**

At this Stage, your Portal Profile has been set up, you will need to continue through the below steps to complete your Personal and Company Profile;

1. Once you have accepted the terms and conditions you will be directed to your Profile Page,
2. Update your personal information, then scroll to the bottom of the page and click on **Update** to save the changes.

On your profile page, there is an option for you to received Spot Coal Notifications, Select **NO** to not receive notifications or **YES** to receive notifications.

4. 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**

5. How to set up your Account

Once your personal profile has been set up, the next step is to create your company account. Follow the below steps to create a Customer Account;

1. Login into your personal portal profile
2. From the menu, click on **Customer Management**, then click on **New Customers**.
 - a. If the option “New Customers” is not available, please refresh your browser.
3. **Step 1**, view your personal details and update where necessary, then click on **Next**
4. **Step 2**, complete the account form, then click on **Next** to continue.
5. **Step 3**, Confirm your company type is correct then proceed to upload the list of documents required to create an account. Once you have completed the uploading of your documents, click **Next** to advance to the final stage.
6. **Stage 4**, complete the application form and add the required Mine Site Products before you submit the Application.

6. How to register a Haulier on the Portal

A Haulier can be added by a Customer. The below processes show each registration process;


Registration by Customer Invite

- a. Click on Haulier Management
- b. Click Add Haulier
 - i. Before adding the Haulier, please use the search box to check if the Haulier already exists on the system, if not then continue to the next step.
- c. Complete the Haulier's details
- d. Click submit

On completion the Haulier will receive an email containing a link to redeem the invitation.

7. Manage Company Profile

This function allows a user with the appropriate permissions to update the company details;

1. From the main menu, select **Customer Management**
2. Select **Manage Company Profile**
3. On the right of the company details, select  then select **Update**
4. Make the changes as required and then click on Submit to save the changes.

8. Manage Contacts

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



1. From the main menu, select **Customer 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 access permissions. The Primary Contact(The person who initially created the account) from the company may add and remove permissions at any time.

9. Edit Portal User Permission

From time to time the Primary Contact from the 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 to deactivate the user, follow the below steps:

1. Change the Portal User's Permissions
 - a. From the main menu, select **Customer 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 **Customer 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. Doing this will revoke the users access to the portaClick on **Submit** to effect the change

10. Create Purchase Order


Once your account is set up and approved, you will be able to place an order. Follow the below steps to create a Purchase Order;

1. From the main menu, select **Customer Management**
2. Click on **Purchase Order**
3. On the Purchase Order List Screen, to the right, select **Create Purchase Order**
4. Complete the **General Section**
 - a. Please ensure that the Purchase order number is unique to this order only. Do not use a previous PO number.
5. Upload the Physical Purchase Order (PDF Document)
6. Click on **Submit** to complete your request.

Once the order has been updated by Exxaro, you will receive a confirmation email. Next, you are required to update the Purchase Order dates.

11. Update Purchase Order



Once a Purchase Order has been updated by Exxaro, you as the customer will receive an email notification. You will need to access the Purchase Order and update the **FROM** and **TO** dates on the Purchase Order. Follow the below steps;

1. From the main menu, select Customer Management
2. Select Purchase Order
3. On the Purchase Order list, Select  on the record you would like to update
4. Click on **Edit and Upload Documents**
5. Enter the **Order From** and **Order To** Dates
 - a. The FROM date must be the 1st day of the month
 - b. The TO date must be the last day of the same month
6. Click on **Update Changes** to affect your update

Once the above action has been completed, the system will automatically create an Order.

12. Assign a Haulier to an Order

Once a Purchase order has been updated with a **FROM** and **TO** dates, the system will auto create an Order. Follow the below process to assign a Haulier(s) to an Order;

1. From the main menu, select Customer Management
2. Select **Purchase Order**
3. On the Purchase Order list, Select 
4. Click on **Edit and Upload Documents**
5. Scroll down to the Order section
6. Select  on the right of the order
7. Click on **Update Order**
8. Scroll down to the Haulier Selection Section
9. Click on the **Add Haulier Selection** Button

13. Add Haulier Selection

Once the user clicks on **Add Haulier Selection** a form will pop up where the user should enter the details regarding the Haulier allocation and the required load to be transported. Follow the below steps to complete the process;

1. From within the Order, Scroll down to the Haulier Selection section and click on the **Add Haulier Selection** Button
2. In the popup window select a Haulier from the list of Approved Haulier's applicable to the Mine Site on your order.
3. In the next field, allocate a portion of or the full load as per the order.
4. To complete the process, click on **Submit**

Should you wish to split the total order load between different Hauliers, then repeat the above process.

14. Dispatch Movement List

Once a loading ticket has been generated against an order and the load has been dispatched from the Mine Site, a Dispatch Movement record is created and listed within the Haulier Selection record. To locate the Dispatch Movement Record for a specific Order/Haulier Selection Record, follow the below steps;

1. From the main menu, select **Customer Management**
2. Then select **Dispatch Movement List**

15. 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.

16. 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.

17. 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.

18. 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.