



Access the portal at <https://erbinteractive.com/>

Registration:

First time users can request their access information by emailing croth@erbgroupp.com.

Reminder - user name and password are case sensitive – **only use lower case.**

Enter an Order:

Go to ORDER ENTRY & select the ENGLISH or FRENCH version.

Select **REQUESTED SERVICE**

Default = LTL – Less than Truckload

TL – Truckload/Dedicated

Select **FREIGHT TERMS.**

Default = 'Prepaid' - client entering order pays the freight charges

Collect – consignee pays the freight charges

Contacts

The 'Caller' field defaults based on the access code. All other contacts need to be populated.

There are three ways to select a contact:

1. Check the box at the top of the field to auto populate based on description
2. Use the dropdown arrow and select from the list.
3. Use the magnifying lookup and **Search By** COMPANY, ADDRESS, CITY or POSTAL CODE. This is a 'wild card' search. Type any know letters and all matches appear. Click on the COMPANY CODE to auto populate the details.

Contacts NOT in your address book:

1. Select the magnifying glass
2. Select ADD NEW
3. Enter the requested details and SAVE – ensure the city and province are spelt correctly or the CALCULATE DELIVERY DATE feature will not work. Note – enter PQ for Quebec locations

Details

Enter Commodity Temp (default = Chilled Product), pieces, weight and pallet spots (one decimal place is acceptable eg. '.2' of a pallet). Temperature is based on Chilled/Frozen/Dry Product and cannot be altered. Optional fields include: Requested Equipment for pickup and Declared Value. Cross border mandatory fields include: Freight Commodity, Customs Broker (free form entry) and Customs City/St-Prov (select from dropdown).

Dates

Enter requested PICKUP DATE/TIME and shipper CLOSE TIME (if known). PU Time and Close Time default to 12:00 AM. Check the box if a PU Appointment is required.

Use the CALCULATE DELIVERY DATE button to populate the SCHEDULED DELIVERY DATE. The delivery date calculates based on the Erb Linehaul Delivery Schedule.

Enter the MUST ARRIVED BY DATE for appointment deliveries.

NOTES

Use to add free form notes pertaining to the shipment. Each line has a maximum of 40 characters.

TRACE NUMBERS

Enter the trace number(s) specific to the shipment. Use Reference # to enter load tender #.

SUBMIT ORDER

Click on the green SUBMIT ORDER button and enter a valid email address. When entering multiple orders, the email address will auto-populate after initial entry.

Select the BOL and Pallet Label Report to include a copy of the BOL and Pallet Label with your order entry confirmation email.

Mandatory fields need to be populated or a popup will highlight the missing information.

A popup will also indicate if the account has NO CREDIT. Orders with NO CREDIT **cannot** be submitted.

Please contact your Credit Rep to address the outstanding issue(s).

Order Confirmation:

A second confirmation email is sent after our Customer Service team has accepted/rejected the order.

Note: the order # sent with the confirmation is not a searchable trace value in Erb Interactive.

Hint: You may want to set up an email rule for incoming Erb Order Acceptance Notifications in order to avoid filling your inbox with multiple order entry and order acceptance emails. Do not include rejected Erb Order Notifications in order to deal with the rejected order.

These features are under Development:

- 1) **Order Summary of all submitted orders**
- 2) **Ability to copy orders from the Order Summary**

Caution – Contact our Customer Service Department if incorrect data has been submitted.

Phone: 1-855-225-5372 / email: CustomerService@erbgroup.com

Track and Trace

Use the Track and Trace option to view: the current location of a shipment; re-ships or returns; or access POD's using a reference #. Users can search by BOL#, Reference # or PO#.

Proof of Delivery Retrieval

Get Proof of Delivery by entering the PO # or BOL # or if known, use the Load Stop # or freight bill #.

Delivery Schedule

Provides information on statutory holidays and delivery days by specific location.

Security

Access security and compliance information.

Tools and Documents

Access Shipping Documents, Rules and Regulations, Claims Procedures and Information or Waiver Agreements

Reports and Inquiries

There are three main areas to provide both timely and historical information. Select the required report and follow the instructions.

Note: The Customer Movement Analysis and Customer Service Report are great tools to locate the Erb pro number in order to locate a POD.

Inquiry Functions	Reporting Functions	Update Functions
Open OS&Ds	OS&D analysis	Add e-mail addresses for reports
OS&D History (past 60 days)	Customer Movement Analysis	
Delivery Surcharge locations	Customer Service Report	

Sub-Account

Users can provide access to other internal or external users based on the user's requirements.

Active Loads

Get real-time information on all deliveries en route to their destination.

Rate Cards

Access the rate card specific to your company

Erb Interactive questions / access questions - 1-800-665-COLD ext. 2299 or email croth@erbgroup.com