

# MANUAL + FUNCTION

## INSTRUCTION SET FOR MANUAL CREATING OF e-CMR'S

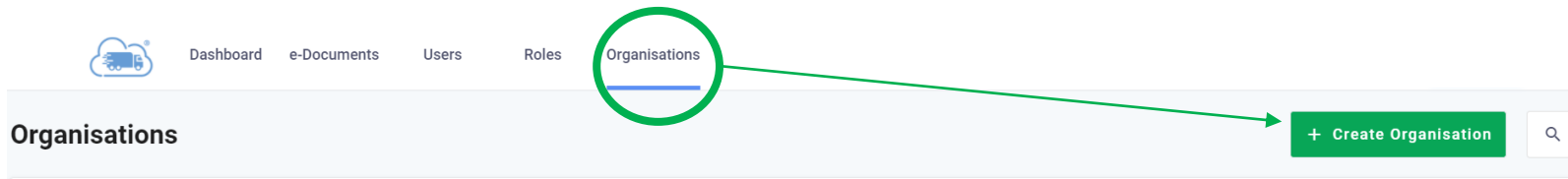
In order to create e-CMR's take the following steps:

1. Create organisations in Portal
2. Create users in organisations
3. Create e-CMR's
4. Add goods to e-CMR's

# CREATE ORGANISATIONS

## 1. CREATE ORGANISATIONS

In [portal.collectgo.eu](https://portal.collectgo.eu) select Organisations and click on the green button 'Create organisation'



Fill out the form with the details of the new organisation.  
Parent organisation is the organisation provided to you by the super admin.  
Carrier Code is only applicable for transportation companies.

This has to be done once for each company used on the e-CMR

### New Organisation

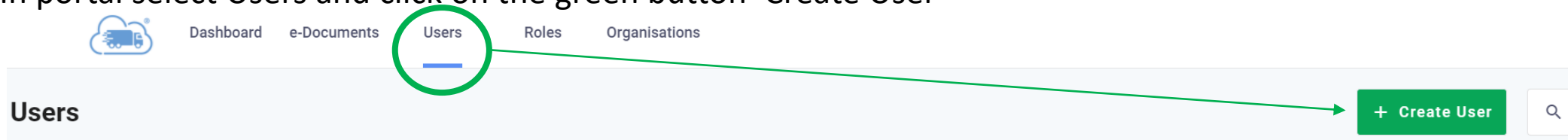
GENERAL OPTIONS    EMAIL OPTIONS

Name	
Carrier Code	
Parent Organisation	
Postal Code	Country Code
Place	
Street + nr.	
Organisation Type	

# CREATE USERS

## 2. CREATE USERS IN ORGANISATIONS

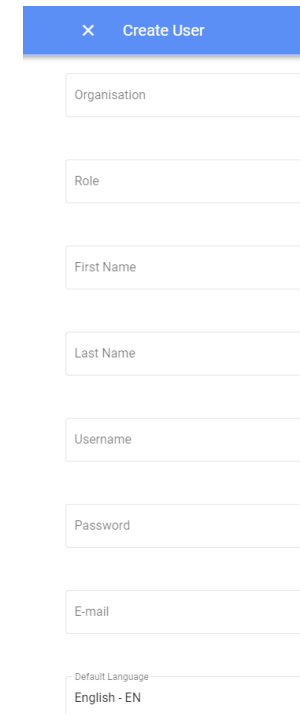
In portal select Users and click on the green button 'Create User'



Fill out the form with the details of the new user.

'Organisation' is the organisation the user will be created in

'Role' defines the permissions for the user.

A screenshot of a 'Create User' form. The form has a blue header with a close button (X) and the text 'Create User'. Below the header are several input fields: 'Organisation', 'Role', 'First Name', 'Last Name', 'Username', 'Password', 'E-mail', and 'Default Language'. The 'Default Language' field is pre-filled with 'English - EN'.

# ROLES AND PERMISSIONS

## 2. CREATE USERS IN ORGANISATIONS

Depending on the 'Organisation Type' the following roles for users are available:

- Super Admin Has permission to create organisations and users
- Company Admin Has permission to create users within own company
- Planner Has permission to modify e-CMR's and create driver users
- Signing User Has permission to view, modify and sign e-CMR's in portal (e-signing)

When creating a Signing User an email will be sent to the new user with a request to activate the account.

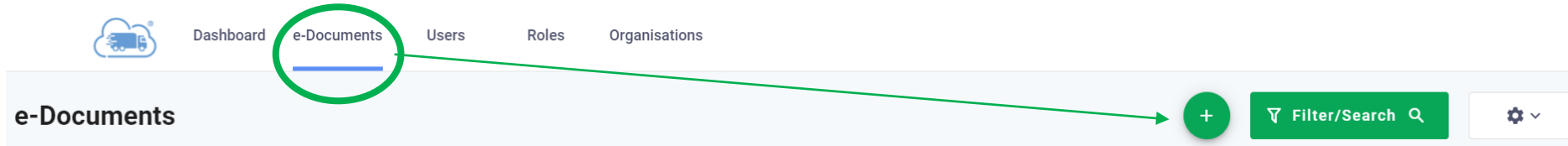
Password will be a pincode with which one can sign e-CMR's

- 1) The admin user gets access to the Collect + Go portal with visibility and processing options for the e-CMR transactions for that organisation.
- 2) Admin users and planners can make changes to e-CMR's.
- 3) Signing users are able to sign e-CMR's with QR or pincode.

# CREATE E-CMR'S

## 3. CREATE E-CMR'S

In portal select e-Documents and click on the green + button



Fill out the presented fields.

The CMR code is the unique code of the e-CMR.

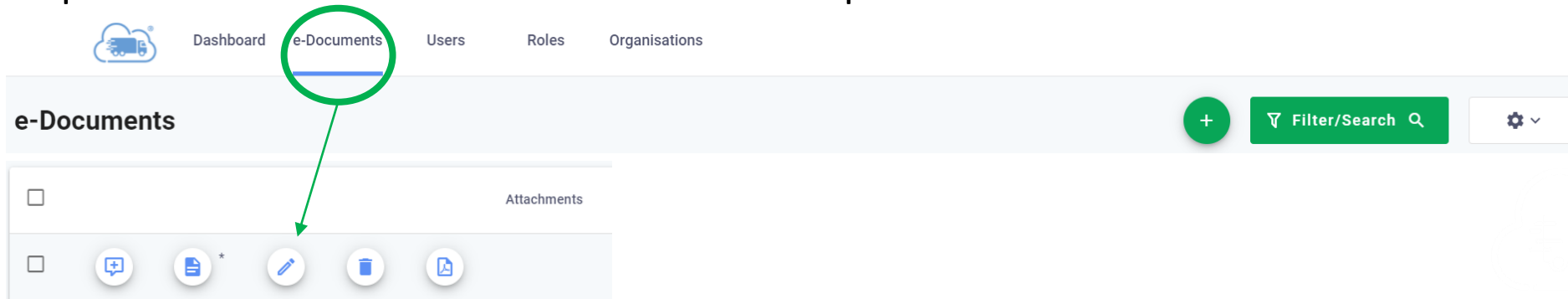
Email addresses will be used to send the signed e-CMR's to sender, carrier and receiver.

Assign driver. This is necessary to process the e-CMR in app.

# ADD GOODS

## 3. ADD GOODS TO E-CMR

In portal select e-Documents and click on the pencil button



By clicking on the + Goods, Return Goods and Containers can be added to the e-CMR

Goods	+
Returned Goods	+
Containers	+

**YOUR E-CMR IS NOW READY FOR SIGNING**