C3 Solutions

USER GUIDE

C3 Reservations for ANDMORE Tenant/Exhibitor

06/01/23

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1. INTRODUCTION

1.1 Technical Requirements

Browsers:

The two latest major versions of the following browsers are supported:

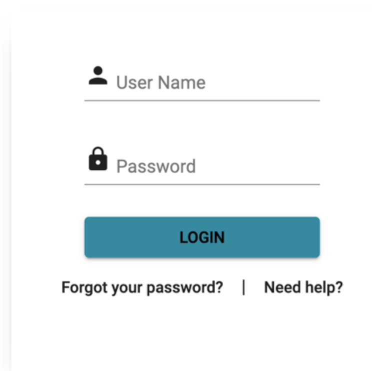
- Chrome
- Edge/Edge (Chromium)
- Firefox
- Safari

For security reasons, C3 recommends staying on the latest version of any browser you use.

*Subject to change.

1.2 Login Process

1. Go to: www.c3reservations.com/andmore/app/login
2. Enter the **Username** you were provided. (Your username is a variation of your email address. As an example, janedoe@andmore.com would be janedoeandmore.
3. On your first visit, you will need to click on "Forgot password" to setup your password. (Note that passwords are case-sensitive).
4. Once your password is reset, enter the **Username**, **Password** and Click the **Login** button to access the home page.



Forgot your password?
Click the Forgot? link, enter your username and email address to receive a temporary password by email.

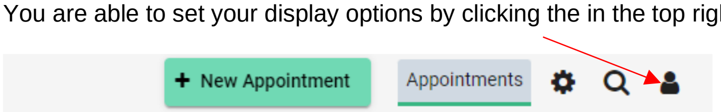
Password criteria

- 8 characters minimum with all the following
  - At least 1 uppercase letter
  - At least 1 lowercase letter
  - At least 1 digit from 0 to 9
  - At least 1 symbol (~!@#$%^&*_-+=`|\(){}[]:;"'<>,.?/)

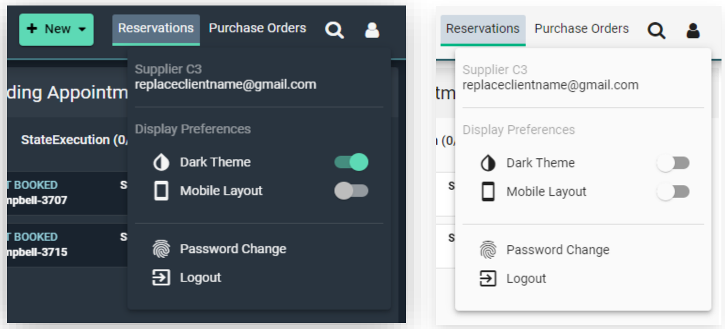
1.3 Display Options

Once in C3 Hub, you will have the option to personalize your layout and theme:

You are able to set your display options by clicking the in the top right hand corner of your screen.



You can choose either a light or dark theme.

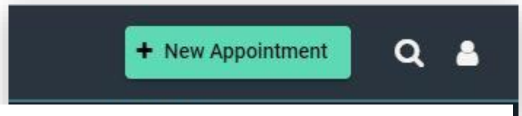


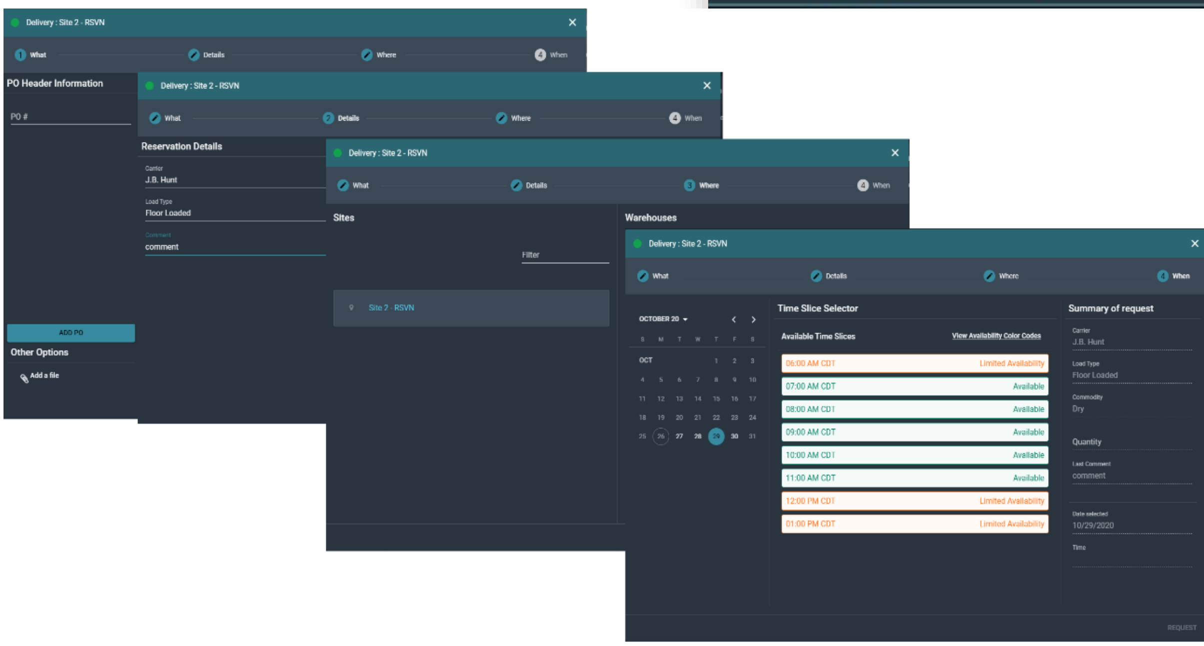
1.4 Home Page Overview

1. **Your active appointments**
2. **Action buttons** to amend or cancel the selected appointment – appears only when you click on the appointment.
3. **Filter fields** – type in characters to narrow down the list of appointments or PROs (e.g., supplier, Ref#, SITE).
   Click the ( ) icon next to a column name for more criteria (e.g., by date range)
4. **Search feature** – Type in a PRO#, Appointment # or Carrier to find an appointment (including past and cancelled ones).

2. REQUESTING AN APPOINTMENT

Click on the green **+ New Appointment** to enter the appointment details located on the top right hand side of the screen.





Step 1 - What:

- **Shipment Details**: Type in a PRO # and fill in all the shipment detail fields. Required fields are noted in red text in the system.
- Click the green **Add PRO** button (step needed to continue to Step 2) Repeat for multiple shipments on the same trailer, if applicable. You can add multiple shipments on the same reservations.
- Click on the **Continue** button on the bottom right of the screen.

Step 2 – Details:

- Reservation Details: Fill in the required fields, noted in red text (Appointment Type, (Un)Loading Service Provided By, Load Type and Carrier) and add comments. Please ensure to add all known relevant information e.g., trailer number. (You can always add information later; however, this information will help once your truck check-in and throughout receiving process)
- Click on the **Continue** button on the bottom right of the screen.

Step 3 - Where:

- Step to confirm SITE and delivery location.
    - Note - If you have showrooms in multiple sites, you will see all your sites and will need to select the correct one for your shipment. You will only see sites where you have an active showroom.
- Click on the Continue button.

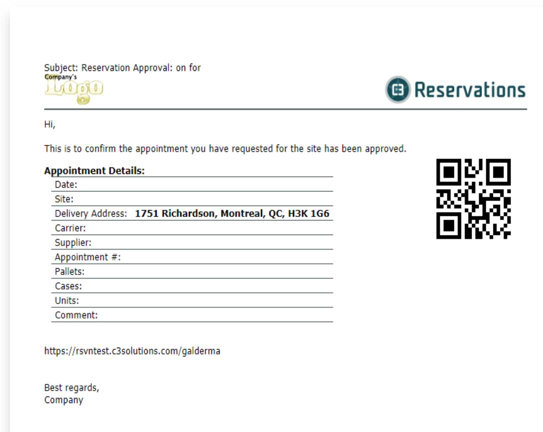
Step 4 - When:

- Use the **Calendar** button to select a date.
    - Times available for that date will be listed on the right; each with a status: 'Available'. If the schedule is full for the date you wish to request, there will be no appointment times showing available.
- Select a time and click on the **Request** button on the bottom right of the screen.
- Back on the home screen, the appointment.

2.1 Approval Process

Approved appointments will be notated by a green bar on the left side of the appointment.

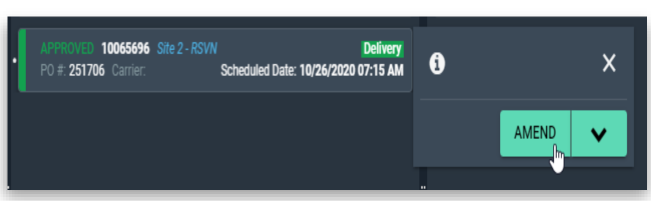
- You will receive an email confirmation.
- The system generates a unique 'Reference #' for each appointment.
  It will appear on your email confirmations and can be used as a search filter.
- If your Appointment is rejected by the scheduling team, you will receive an email with instructions.
  If your request is approved for a different date/time than what you had requested, the email confirmation will clearly indicate the new proposed time.



3. EXCEPTIONS

3.1 Amending an Appointment (change, add info or reschedule)

- Click on an approved or pending appointment on your home screen.
- Click on the Amend button.



To make changes to PROs

From the What step: Make changes to the Pro # Details.

- Hover curser over PRO# bar
- Select **Edit (add icon)** to open the Pro # details.
- Select **Save (add icon)** to save changes.
- Click on **Continue** (3x to get to When if no other changes are needed)

From the Details

- Make any changes needed.
- Click on **Continue** (2x to get to When if no other changes are needed)

From the Where Step:

- Make any changes needed.
- Click on **Continue**

From the When Step

- When done making all your changes, click on the Amend button (bottom right).
- Select a reason code and enter a comment for your change request.
- Click on the Amend button to save your request.
    - Back in the home screen, the appointment now appears with an orange status bar.
    - The scheduling team will have visibility on your change request.

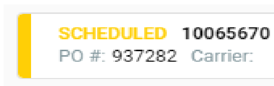
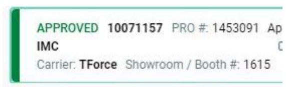
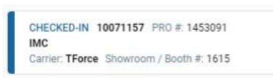
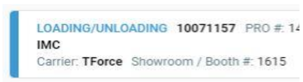
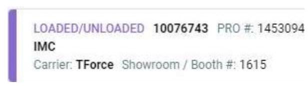
To Reschedule an appointment

From the When step:

- Click the toggle **"Reschedule this appointment"** button at the top left of the screen.
- Select the new date and time for the delivery appointment.
    - Times will be listed with an availability status.
- When done making all your changes, click on the Amend button (bottom right).
- Select a reason code and enter a comment for your change request.
- Click on the Amend button to save your request.
    - Back in the home screen, the appointment now appears with an orange status bar.
    - The scheduling team will have visibility on your change request.

You will receive an email notification indicating whether it was accepted or declined.

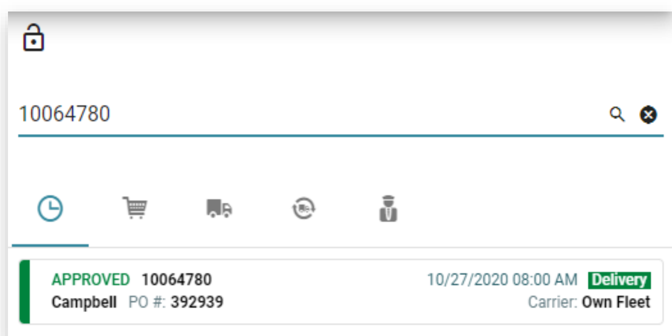
4. COLOR CODES

Scheduled Appointment		**Yellow status bar** Appointment waiting for the scheduling team's approval.
Approved Appointment		**Green status bar (and reference #)** Approved appointment
Amended Appointment		**Pale Orange status bar** Change requested for approved appointment (pending approval).
Appointment Checked In (Arrived)		**Dark Blue status bar** Appointment that has been flagged as Arrived (by the SITE)
At-Dock Appointment		**Light teal status bar** Appointment that has been flagged as At Dock (by the SITE)
(Un)Loading In Progress		**Blue status bar** Appointment in the process of (Un)Loading.
Completed Appointment (Received)		**Light purple status bar** Appointment that has been flagged as Received (by the SITE)
Cancelled, Reject, or 'No Show' Appointment		**Red status bar** Cancelled/Rejected by vendor/scheduling team, one that has been flagged as No Show by the scheduling team. Double-click appointment for details.

5. SEARCHING FOR AN APPOINTMENT

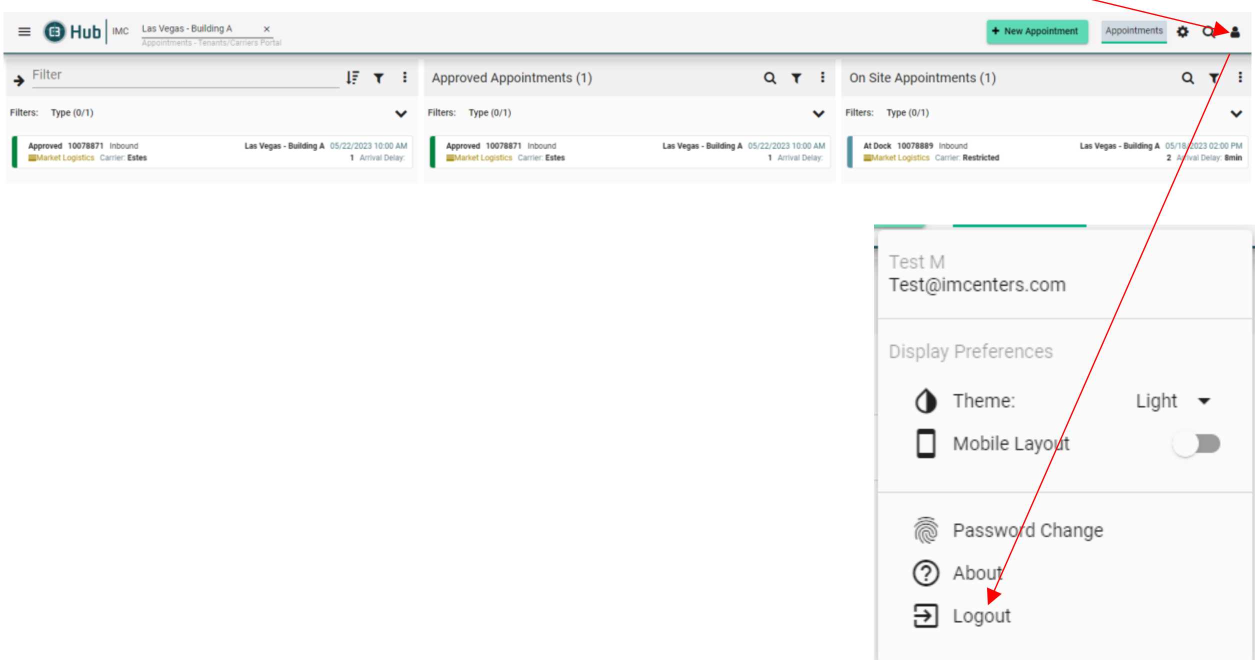
1. Click on the ( ) icon to open the search bar.
2. Type in a PRO#, Appointment# and hit ENTER to initiate the search. (You can use * as a wild card if you only have the beginning/ending of your number i.e: *3030 OR 10* to find the below reservation).

   The matching PRO#, Appointment# will be listed. Double-click on a PRO/Appointment (or select it and click on the ( ) icon) to view its details.



6. LOGGING OUT

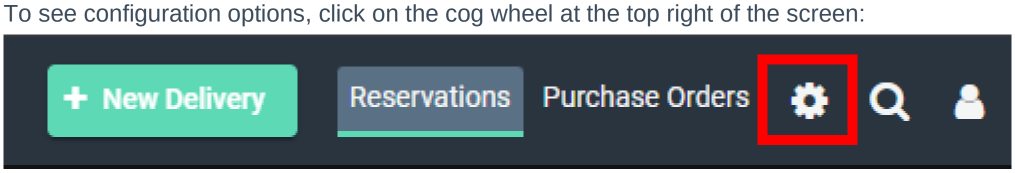
To log out of the application, click the icon on the top right side of the screen:



7. COMPANY MANAGEMENT

Users with an admin role have the ability to edit their company's details, change associated suppliers as well as create and delete users for their company.

To see configuration options, click on the cog wheel at the top right of the screen:

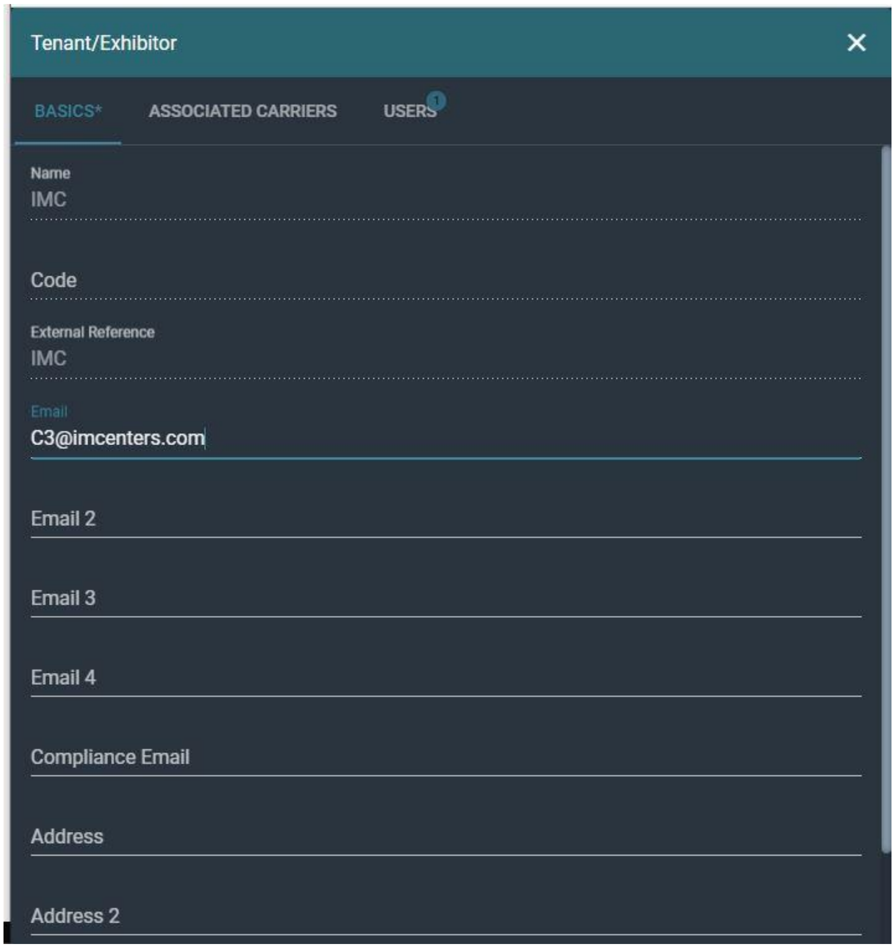


The configuration widget will open. There are 3 options: Basics, Associated Carriers and Users.

Basics

The Basics section represent your company details. Before editing information in this section, we strongly advise contacting the environment administrator for more instructions.

This is where you can edit the company's email addresses to receive email notifications. Note that usually, only 'email' is used for notifications and email 2, email 3 and email 4 are there for informational purposes.



Associated Carriers

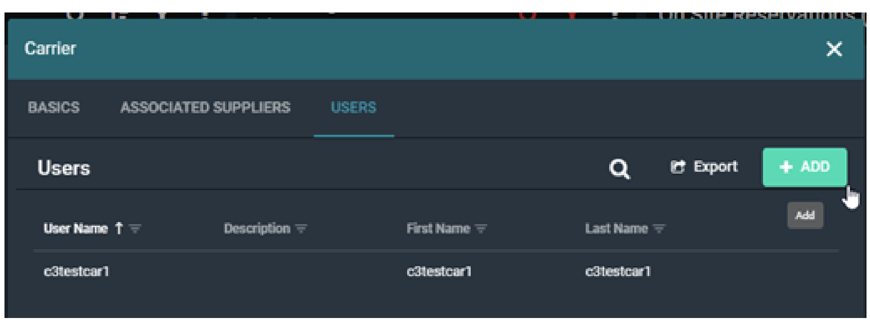
This section should also be managed by the environment's super administrators. The associated carriers are the carriers that will show up in the carrier drop down menu when you request an appointment, if applicable. Carriers associated to tenants will also only be able to book shipments if applicable.

Users

This section is the most useful one on an external portal administrator's perspective. This is where you will be allowed to manage users for your company.

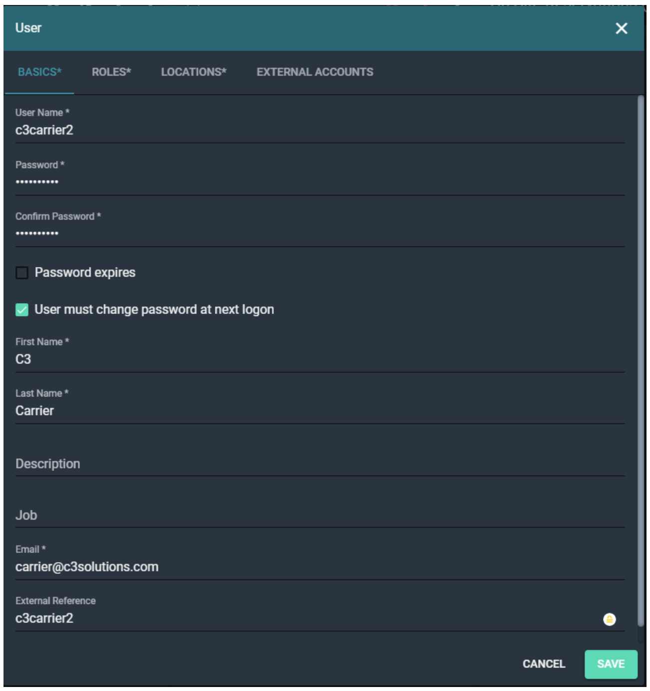
Add a user:

In the Users tab, click on + ADD



The Users creation widget will open, complete all information for this user and save. There are 3 mandatory sections to complete the creation of a new user: Basics, Roles, Locations.

- Basics: all basic information about the user (name, username, email address, password, etc.)
- Roles:
    - Tenant Admin - has the ability to access the configuration (users, company information) and request appointments.
    - Tenant User - User has the ability to request appointments.
    - Reporting - Read Only - gives the user access to reports, if any reports are shared with external portal users.
- Locations: Determines the sites where this user is allowed to request appointments.
- External Accounts: This section is not used.



Edit or delete a user:

In the Users tab, choose the user you want to delete and hover the mouse on the right of the user's row, two icons appear: a pencil and a X. To edit the user information, click on the pencil, to delete it, click on the X.