

Learning About your Customer Portal

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Step 1: After you have been assigned a login & temporary password, go to www.consolidatedgypsum.ca. Click on the Web Track login link located on the top right “Web Track sign in / out” and then sign in.



Step 2: After you have signed in, click on the Web Track login link again. In the drop-down menu you will see a “settings” link. Please click on this link.



Step 3: This area will allow you to change your temporary password to whatever you like. Remember to make your password strong!

Also located in settings you can change your user details such as your first name, last name, e-mail address and trading branch.

Remember to hit the update button before leaving this page.



After you have been assigned a login & password, go to www.consolidatedgypsum.ca. Click on the Web Tracklogin link located on the top right portion under "Services" and then sign in.

Click on "View your Account Information".

Left navigation shows you all the extra perks that come with this phase 1.

NAVIGATION BAR

Account Information
Quicklists
Quotes
Orders
Proof of Receipt
Invoices
Credit Notes
Statements
Addresses
Contacts

View your account history, quotes, orders, invoices and credit notes with ease and at your convenience 24/7.

PROOF OF RECEIPT

Track and follow your deliveries and get a proof of delivery photo taken by our drivers.

You can monitor your deliveries and have peace of mind that your job materials are ready for when you arrive at your job site!



QUICKLIST TAB

You can select products from our catalogue and create a custom list of products that are specific to your company.

Proceed to page two for detailed instructions.

ACCOUNT INFORMATION / ADDRESSES / CONTACT TABS

If your contact information changes in any way please contact our Credit department so that they can update it.

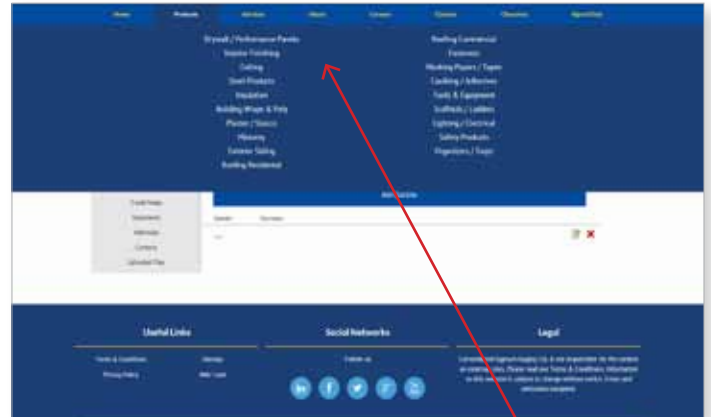
SIGNING OUT

Sign out using the top navigation bar.

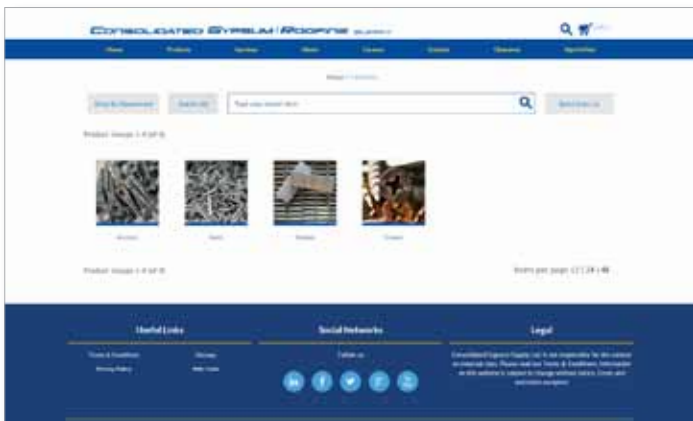


Select products from our catalogue & create a custom list of products that are specific to your company!

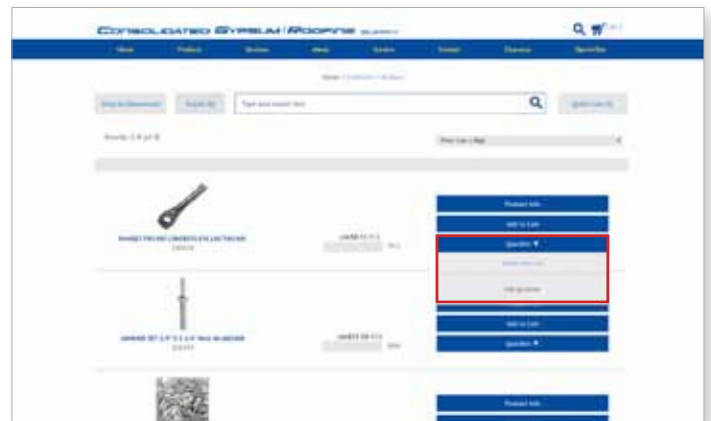
Create, and edit as many of these custom lists as you want.



1 - Click on “Products” in the top navigation bar. Select your item from the drop down menu.



2 - For this example, we are using Fasteners. Then we clicked on Anchors to find a product we want on our Quicklist.



3 - Notice the “Quicklist” tab on the right. Selected “Add to New List”. Prices shown will be unique to you.



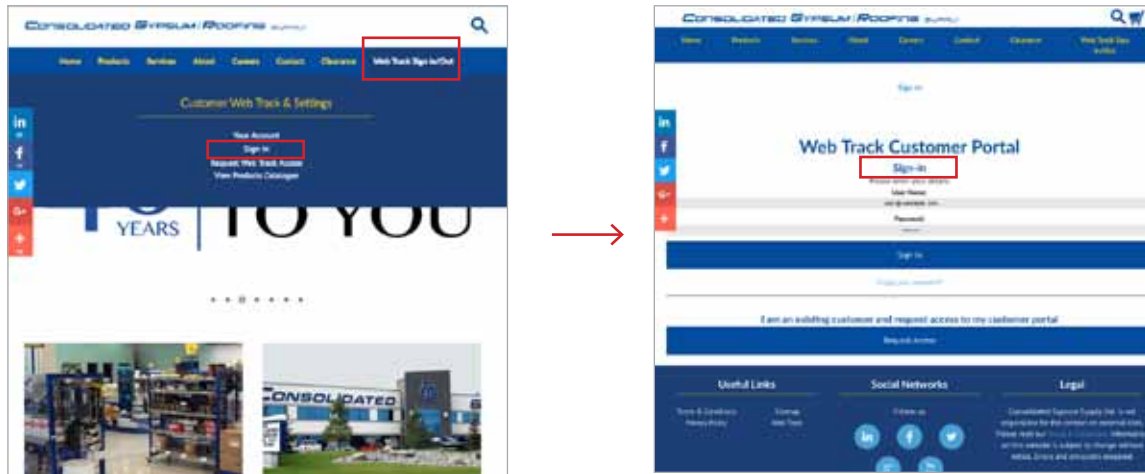
4 - Give your list an unique name and save. Make your list as long as you wish or make multiple lists.

If you have lists created already, they will be included in the drop menu along with “Add to New List” and “Edit Quicklists”.



5 - Your lists are stored for future reference or you can easily export the list in an Excel spreadsheet.

The Excel spreadsheets will be very useful for your estimating and billing.



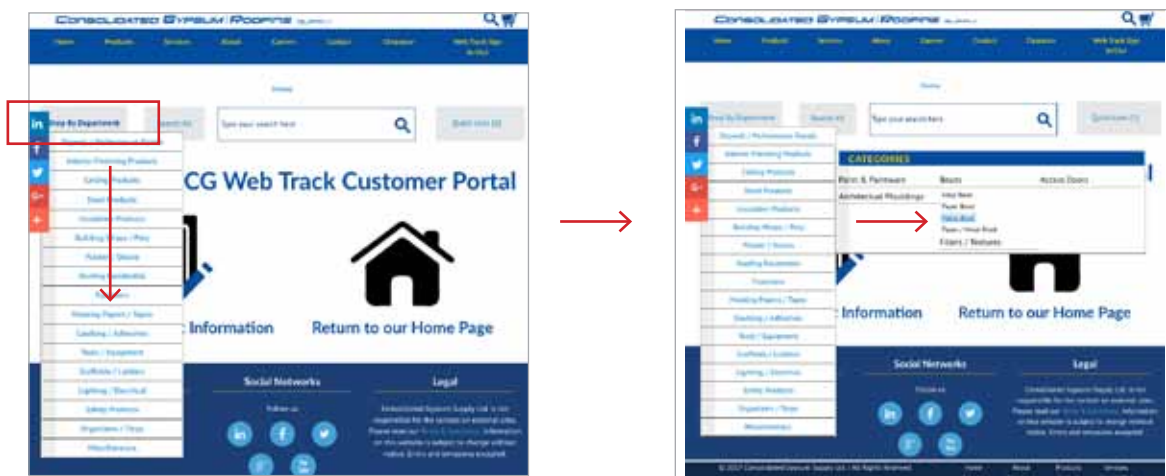
First, SIGN IN to your account. You will be redirected to the welcome customer portal page.

If you have lost or forgotten your log in user name and password, please contact our credit department.

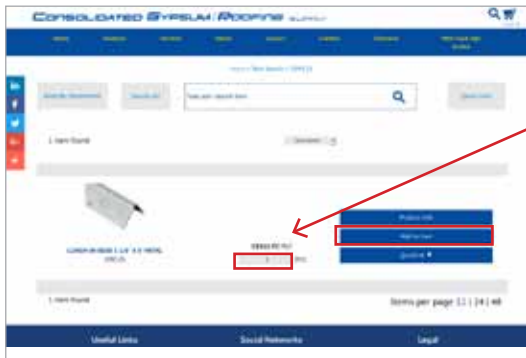
NOTE: If you need to request access for the first time, contact our credit department one of three ways:

- 1- Call toll free: 1-877-752-7786 local: 780-452-7786
- 2 - Email credit@cgsupply.ca
- 3 - Click on the “request access “ button. Follow the prompts and press submit.

Someone will contact you as soon as possible with log in credentials.



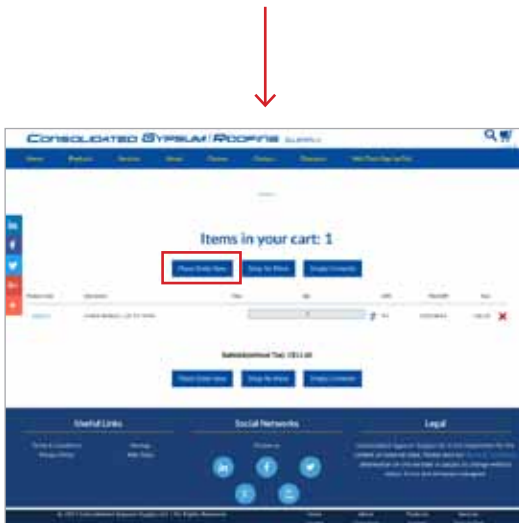
Click on the “Shop by Department” button and then select a category and sub category in the drop down menus.



Enter a quantity and click "Add to Cart".



Notice there is a number in your cart. Even though you selected 5 units, the number 1 is in your cart indicating one transaction.



You can shop for more items, edit what you have selected or submit your order by clicking "Place Order Now" and follow the prompts on the Check Out Details page.

By default, some of our items are priced by thousand linear feet (MLF). As you proceed, the price will be adjusted to the unit price on the "Items in your Cart" page.

NOTE:

If your button reads, "Place **Quote** Now", instead of "Place **Order** Now", you are NOT signed in to your account.

You must sign in to get your special contractor and regional pricing.

Use the "Sign In" button and proceed.



Once you have signed in, you'll get a message indicating that your prices have changed.

Go ahead and continue shopping or place your order and then proceed to the Check Out Details page.

Check Out Details

Carefully read and fill out all the fields.
* indicates a mandatory field.

It is very important to select your branch, shipping method and date required.

You will get a follow up call from a sales rep to discuss delivery charges, special instructions and confirmation of your order.

When completed, click "complete"

You will get another window with your summary. You can still go back, or continue. Note: you must check the agree to terms and conditions box to finalize your transaction.

Finish by clicking "Complete Order".

You will be given an order confirmation number.

Product Code	Description	Qty	UOM	Price	UOM	Total
09923	CLUNG ON BEAD L. GUT. A.R. METAL	1200	PCS	C\$2.64		C\$31.68

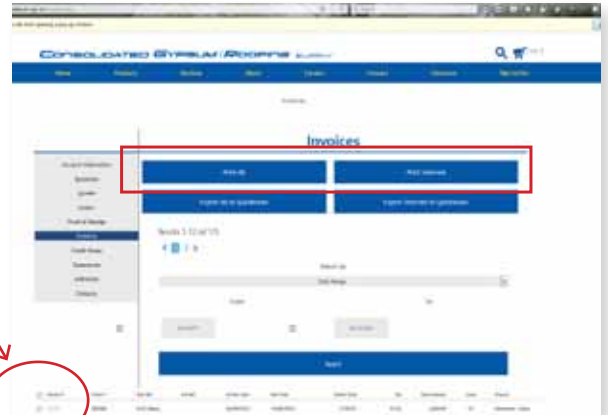
The Invoices you select to print will be in a PDF and they will “pop-up” in a new window so you can print them. You will need an Adobe PDF reader. Majority of computers have this installed. If your does not, you will need to install one. Its free and will need to be downloaded. Go to this link and click on “Install Now”: <https://get.adobe.com/reader/?promoid=BUIGO>

Also, please make sure you are running the latest version of your browser. If not, download and install a newer version.

HOW TO PRINT INVOICES

You need to “select” items you want printed. Check off corresponding box or boxes and then click on “print all” or “print selected”.

A new window will appear with a PDF. You can either print it from your browser (Internet Explorer, Firefox, Chrome, Opera, Safari) or download the PDF and print it from your desktop.



IF YOU ARE USING FIREFOX & GET THIS MESSAGE

What has happened is your invoice is trying to open in other window (pop-up) and FIREFOX has blocked it.

You are given three options on how to proceed:

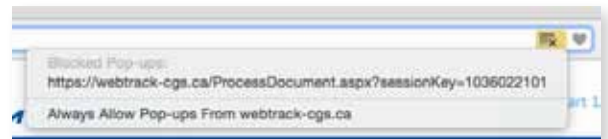
- 1- Allow pop-ups for www.webtrack-cgs.ca
- 2- Edit pop-up Blocker options...
- 3- Don't show this message when pop-ups are blocked.



Firefox

Webtrack-cgs.ca is a secure site. Go ahead and click on “Allow pop-ups for www.webtrack-cgs.ca” Moving forward, this will allow you to view and print your PDFs from your Web Track Customer Portal.

CHROME and **OPERA** will have a similar message. Go ahead and click on “Allow pop-ups for www.webtrack-cgs.ca”

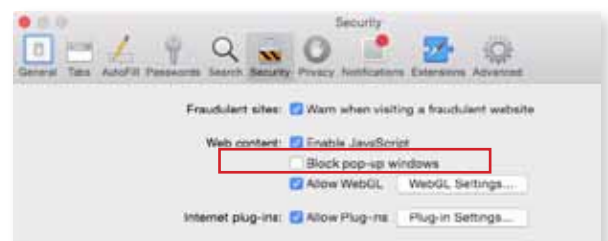
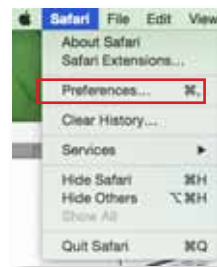


Opera

IF YOU ARE USING SAFARI

Go to Preferences, then Security. Uncheck “Block pop up windows”.

When you are done viewing and printing your PDF, you may want to return to your security settings and check that box to prevent future pop ups. Note that each time you want to view or print a PDF from your customer portal, you will have to uncheck that box.



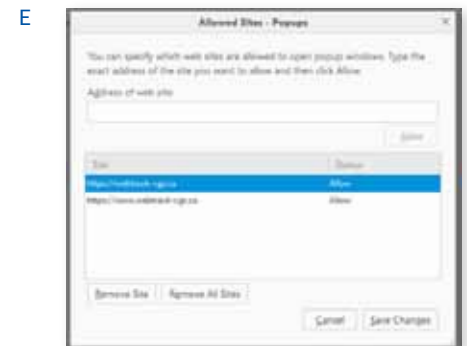
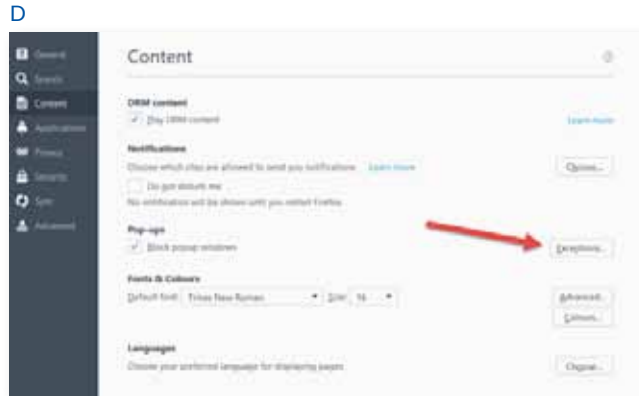
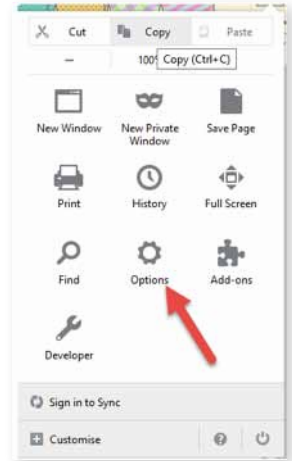
Safari

IF YOU ARE USING FIREFOX , YOUR INVOICES DO NOT PRINT & YOU GET NO MESSAGE

Click on the icon that looks like three stacked lines. This should be in the upper right corner of the Firefox window. (Image A)

Then click on the icon that looks like a gear. On a Window computer it is called "Options". On a Mac computer, it is called "Preferences". (Image B)

This will open a new tab in the browser. Click on "Content" on the left navigation bar. (Image C) Then click on 'Exceptions...' on the right side of the window. (Image D)



An "Allowed Sites" window will appear and you will need to add 'https://webtrack-cgs.ca' and 'https://www.webtrack-cgs.ca' to the allowed exceptions. (Image E)

Press "Save Changes"

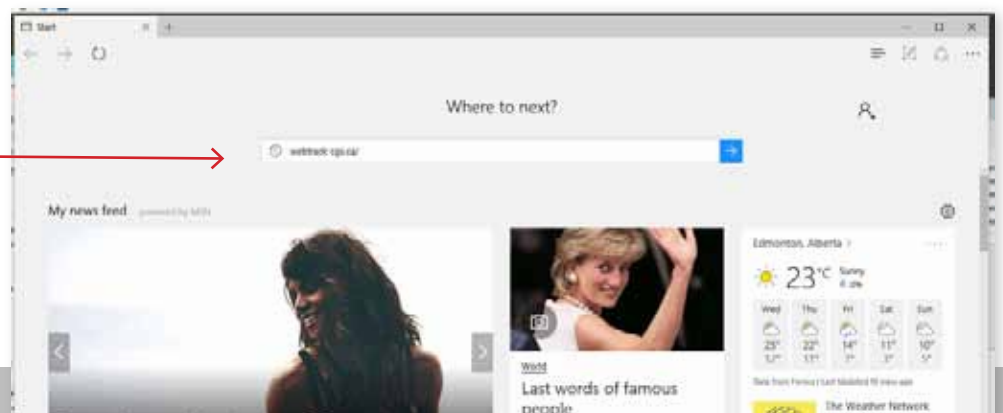
IF YOU ARE USING EDGE

It is a known problem to open PDF documents using Edge. To get around this, you can open Edge in an Internet Explorer Browser.

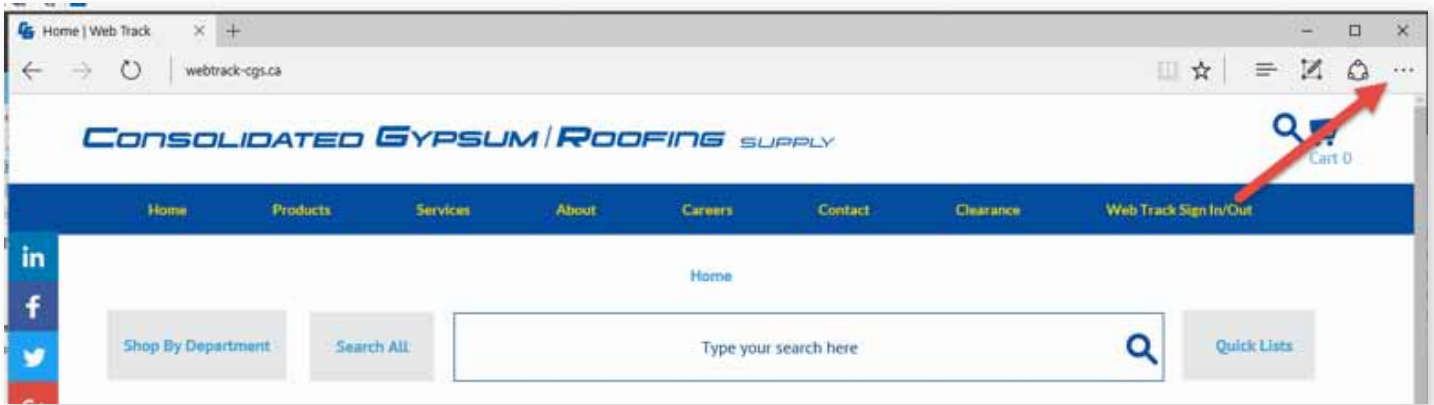
Click on the Edge Icon



This will open the Edge Browser, type the website you wish to go to in the search box and click the arrow. In this case I want to go to 'webtrack-cgs.ca'



When you get to your web page click on the '...' in the upper right corner.

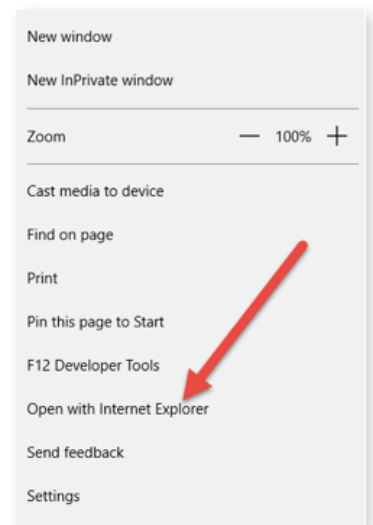


This will open a pull down.

Click on 'Open with Internet Explorer'

This will open a new browser running Internet Explorer v11.5

If you want you can right click on the new Icon and Pin it to the task bar for next time.



OTHER WAYS TO PRINT FROM YOUR BROWSER:

1- In top right hand corner there is Icon that has 3 lines horizontally stacked. Click on this icon and the window will expand. Look for the print icon and click.

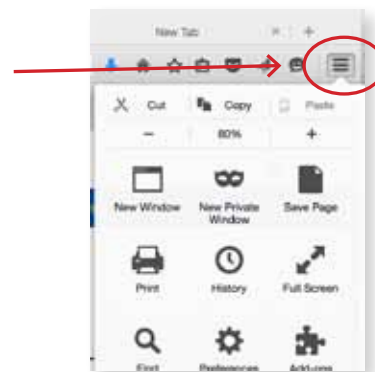
2- You can use keyboard short cuts to prompt your print window.

For PC:

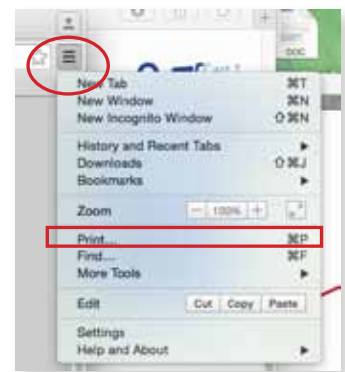
Hold down Control + P

For Mac:

Hold down Command + P



Firefox



Chrome

ACCESS YOUR ACCOUNT 24/7 ON MOBILE!

Go to your APP Store and install.

If your device is an Apple product, go to the App Store and if your device is an Android, go to Google Play.



Web Track App Icon



More information at our landing page
<http://cgs-webtrack-app.ca/>



» Simple, Seamless & Convenient

The new Web Track Account Portal app gives you the freedom to go paperless! Now you can quickly check invoices, quotes and orders within a matter of seconds.

» Monitor your account activity

Monitor your company's account spending and so much more...

Account Information
Quotes
Quicklists
Orders
Proof of Receipt

Invoices
Credit Notes
Statements
Products Purchased
Contacts