

# **CargoX Platfrom Users Manual**

**version Version 3**

**CargoX**

August 19, 2021



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# CargoX Platform User Manual

## Contents

### *User Manual*

Users manual for the CargoX Platform (3rd Generation - 2020)

### *Quick Start Guide*

Follow this simple step-by-step Quick Start Guide (reading time 3 minutes), and get ready to use CargoX within minutes! This guide covers everything to get you started. There are no prerequisites, this is the only document you need to read/follow.

Detailed instructions are available during the registration process in case this guide leaves you with questions.

#### **REGISTRATION PROCESS (2 minutes)**

1. Visit the CargoX Platform login page (<https://cargox.digital>) and click the blue **Create an account** button to begin.
2. Provide your company's official full name, address and the country where it is registered. Add the national registration number and if applicable company's tax/VAT number. If you have them, also add your DUNS, EORI and LEI numbers. Phone and website address are optional, but we do recommend that you upload the logo of your company (jpg, png or gif). Click **Next** to continue.
3. Enter your personal details, including your business phone number (mobile number is preferred). Each company on the CargoX Platform needs to have its own account, linked to a unique email address. Same email address can not belong to multiple company accounts. *Be sure to use a **login password** that is at least 10 characters long and uses a combination of numbers, letters, and symbols.*
4. After you click the green **Verify email** button, check your e-mail, and type the received verification number into the provided box. If you do not receive the email, click the *Re-send verification code* button and check your Junk / Spam folders. Click the green **Complete registration** button to continue.
5. **Review** the CargoX Platform Special Terms and Conditions, and if you agree with them, accept them by checking the box at the bottom.
6. To complete registration you need to set up your personal digital signature (blockchain key). Click the green **Start** button to continue.
7. Click **Create a new key** to create a new blockchain key for yourself.
8. **Enter encryption password** that will be used to protect your blockchain key file. *This should not be the same password as your login password.* Click the green **Next** button to continue.
9. Download the generated blockchain key file by clicking the green **Download** button. **Store the downloaded file in a safe place** (we recommend that you immediately create a second copy to a USB drive as a backup). Click **Next** to continue. **ALTERNATIVELY:** If you cannot download the blockchain key file, click the **I am unable to download files**, and copy text content of your blockchain key text and paste it into a document stored in a safe place on your computer (we recommend that you immediately back it up to a USB drive).
10. To associate your newly created and downloaded blockchain key with your CargoX account, click the **Choose file** button, **point it to your blockchain key file** (the one that you just downloaded) and **enter the encryption password for your blockchain key**. Click the green **Verify and Add** button to continue. **ALTERNATIVELY:** Paste your blockchain key text from the document where you stored it into the window, and enter the encryption password for your blockchain key.
11. To finalize the blockchain key adding process, check your email and type the received **verification number** into the provided box. Click the green **Submit button** to finalize the process. When your blockchain key is activated successfully, you will receive an email notification.

**Congratulations, you are done!**

You can now login to your CargoX account with your username and login password and start using the CargoX Platform.

**To prepare your account for the Egyptian ACI filing:**

- Review and if necessary update the details of your company in the My company | Company details.
- Complete the company verification process for your company in the My company | Get verified.

**On the next login please complete the next steps:**

- Verify and if necessary update your personal details in the your own profile.
- Create additional user accounts for your co-workers (people at your company).
- Invite your business and transport partners to connect with your company on the CargoX Platform (people outside your company).

**CargoX user interface is clean and simple.** To familiarize yourself with it read the complete User's manual or just read about The workspace. **If you have any questions, contact us at [support@cargox.io](mailto:support@cargox.io).**

### ***I have received an invitation to join CargoX Platform? How do I proceed?***

#### **Congratulations and Welcome!**

**The revolution has begun, and you are a part of it.**

This is how you proceed:

##### **1. Register**

To exchange digital documents in a safe and very fast manner, you first need to register a free account for your company on the CargoX Platform. **Do not worry and just follow the easy step-by-step instructions** in our Quick start guide. **You will be done in 5 minutes.**

##### **2. Login**

After you log into your account, you will see a pending invitation to connect with the company that invited you to join the CargoX Platform. Now it is time to do the due diligence and verify that company's details. If you know this company, and if the details (contact person, email, phone number) match, **accept the connection**. You can find more information on the connection process and what you should verify here.

##### **3. Take it from there**

You can now exchange documents with the company you just connected with.

Check out the 3-minute challenges to learn how to create & send a smart envelope with original documents, complete your personal and your company's profiles, and create new user accounts for your colleagues.

#### **USER'S MANUAL:**

A complete CargoX Platform user's manual is available for your convenience. You can start by familiarizing yourself with the CargoX Platform workspace first.

#### **QUESTIONS?**

If you have any questions, click the green round icon in the bottom right corner of the screen to chat with our support team, or send us an email to [support@cargox.io](mailto:support@cargox.io).

### ***Hardware and software requirements***

What do you need to use the CargoX Platform?

The minimum software and hardware requirements to use the CargoX Platform are as follows:

- Internet connectivity
- Personal computer or a smart device (phone, tablet)
- A modern web browser (latest version of Chrome and Firefox are officially tested, but any modern browser should do - Brave, Safari, New Microsoft Edge, Opera...).

If you will use a hardware wallet device, verify the minimum requirements with the device manufacturer. Some devices require an administrative privilege on your computer to install drivers and/or use a specific web browser.

**CargoX supports the following blockchain key formats:**

- Keystore (This is a default option - labeled as *blockchain key file* and *blockchain key text* in the platform)
- Private key
- Mnemonic phrase
- MetaMask
- Trezor hardware wallet
- Ledger hardware wallet
- BC-Vault hardware wallet

## Registration

### New company registration

The registration process must be completed only once for each Company.

If your company has already registered an account, ask your coworkers with access to the CargoX Platform to create an account for you.

### Note

You can change the language before proceeding, by selecting it at the bottom of the screen.

### Step 1: Register a new account

To register your company account on the CargoX Platform, open the <https://cargox.digital> and click the blue **Create an account** button.

The screenshot shows the CargoX platform's login and registration interface. At the top, the CargoX logo is displayed. Below it, the 'Sign in' section prompts users to provide login credentials. There is a text input field for 'Enter your email' and a green 'Next' button. A link for 'Forgot password?' is located to the right of the email field. Below the login section, the 'Create a new account' section informs users that account creation is free and easy. It features a blue 'Create an account' button. At the bottom of the page, there is a language selection dropdown menu currently set to 'English'.

## Step 2: Enter your company's information

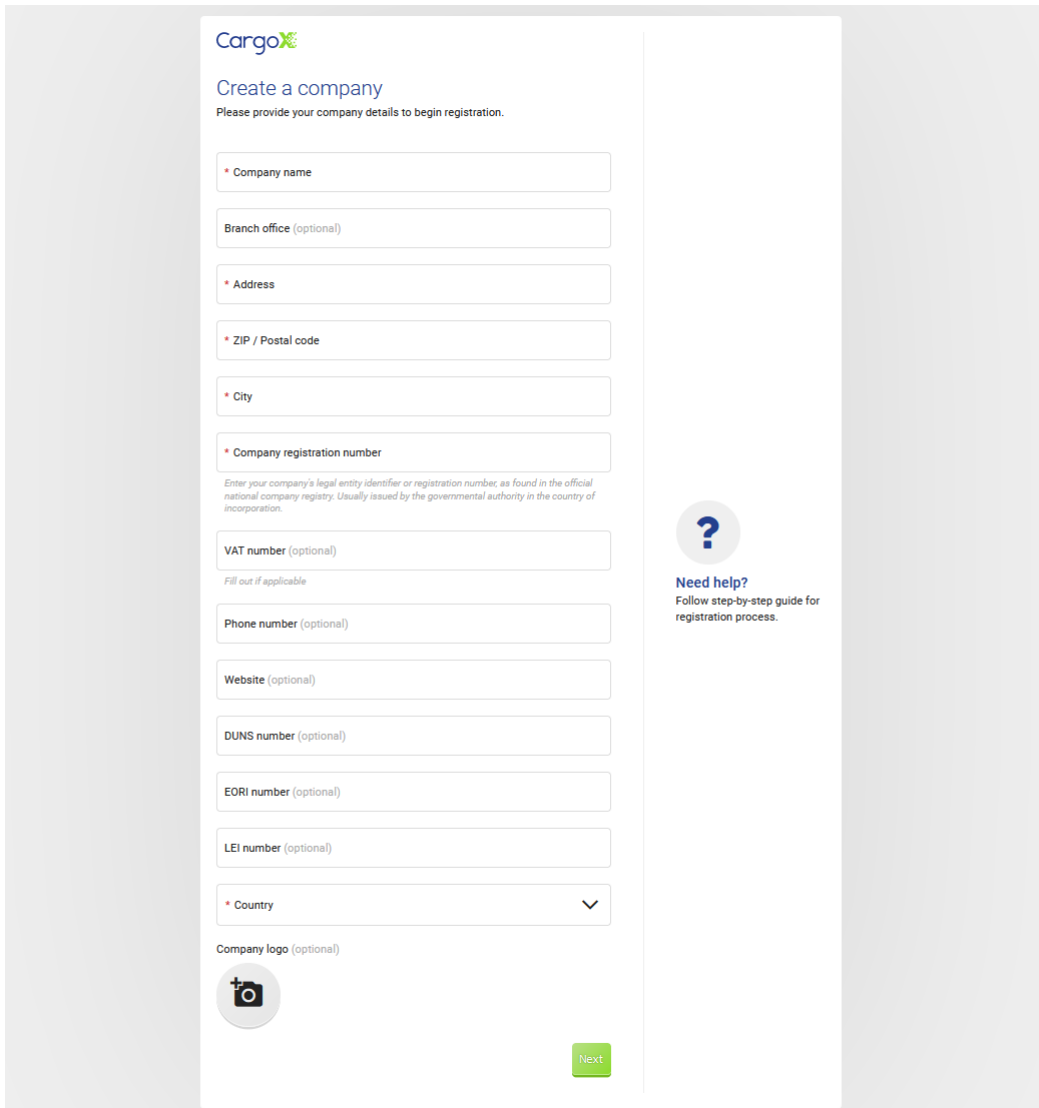
Start by entering your **Company's name, address**, including **ZIP code and city**. Make sure that entered data matches the official company registry of your country, to streamline the verification later on.

Enter your **company's legal entity identifier or registration number**, as found in the official national company registry (number is usually issued by the governmental authority in the country of incorporation).

Continue with entering your **VAT or TAX number** if you have one. We strongly recommend that you enter other details (numbers such as DUNS, EORI, LEI), as this will help in the company verification process that follows.

At the bottom enter the **country** where company is registered.

By clicking on the image icon you can upload your **company's logo** (PNG, JPG or GIF formats only).



The screenshot shows the 'Create a company' registration form on the CargoX platform. The form is titled 'Create a company' and includes the instruction 'Please provide your company details to begin registration.' The form fields are as follows:

- Company name** (required, marked with a red asterisk)
- Branch office** (optional)
- Address** (required, marked with a red asterisk)
- ZIP / Postal code** (required, marked with a red asterisk)
- City** (required, marked with a red asterisk)
- Company registration number** (required, marked with a red asterisk). Below this field is a note: 'Enter your company's legal entity identifier or registration number, as found in the official national company registry. Usually issued by the governmental authority in the country of incorporation.'
- VAT number** (optional). Below this field is a note: 'Fill out if applicable.'
- Phone number** (optional)
- Website** (optional)
- DUNS number** (optional)
- EORI number** (optional)
- LEI number** (optional)
- Country** (required, marked with a red asterisk, with a dropdown arrow)
- Company logo** (optional), with a camera icon for uploading.

At the bottom right of the form is a green 'Next' button. To the right of the form, there is a help section with a question mark icon, the text 'Need help?', and the instruction 'Follow step-by-step guide for registration process.'

## Step 3: Enter your personal information

Now enter your personal details, including business phone number. A mobile number is preferred, as we might contact you during the company verification process.

**CargoX**

## Create user

Now create an account for yourself.

\* First name

\* Last name

\* Email address

\* Phone number

Please enter your business phone number. A mobile number is preferred. We might contact you during the company verification process.

\* Password

\* Repeat password

[Verify your email address](#)

You need to verify your email address before creating an account. We will send a confirmation code to the email address provided above.

[Back](#) [Verify email](#)


**Need help?**  
Follow step-by-step guide for registration process.

Please provide your business email address (avoid using personal @gmail or @hotmail addresses or general addresses like [info@company.com](#)).

Be sure to use a password that is at least 10 characters long and uses a combination of numbers, letters, and symbols.

Now click the green **Verify e-mail** button. Check your email, and type the received verification code into the provided box.

Click the green **Complete registration** to continue.



## Create user

Now create an account for yourself.

\* First name

David

\* Last name

Anderson

\* Email address

david@toystore.com

\* Phone number

+1234567890

Please enter your business phone number. A mobile number is preferred. We might contact you during the company verification process.

\* Password

●●●●●●●●

\* Repeat password

●●●●●●●●

### Verify your email address

A verification code has been sent to your email address.

Verification code


209097|

Enter 6-digit verification code that we have sent to your email address.

Didn't receive a code? [Re-send verification code](#)

Back

Complete registration



### Need help?


Follow step-by-step guide for registration process.

#### Step 4: Review the CargoX Terms and Conditions

Carefully read the CargoX Terms and Conditions. You need to read, understand, and accept them to continue.

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 In accordance with the Special Terms and Conditions, the English law applies to the legal aspects of the bill of lading and the related legal content. Therefore, the Special Terms and Conditions are in English.

## CargoX blockchain-based Smart Bill of lading solutions special terms and conditions (1.0)

**Definitions**

**Target**  
Target is the owner of the website, which operates with a decentralized blockchain platform, that is made available to users for a fee and is the provider of the Service.

**18. Unauthorized User**

18.1. If a User follows them has been unauthorized use of the website and/or Service, the User must notify Target immediately by sending an email to [support@cargo-x.com](mailto:support@cargo-x.com).

**20. Questions**

20.1. If you have any questions regarding these ST&Cs and/or the Service, you may contact us by sending an email to [support@cargo-x.com](mailto:support@cargo-x.com). We will be glad to help you.

Updated: 15th of February 2020

### Step 5: Set up your personal digital signature (blockchain key)

To unlock all the functionalities of the CargoX Platform and to perform any blockchain-related actions, for example - sending a document, you need to have your own digital signature (blockchain key).

Blockchain key is your personal digital signature. Take care of it, as without a blockchain key, no one else can send documents in your name – not even CargoX.

Every user of the CargoX Platform needs a blockchain key to digitally sign transactions and send documents in envelopes. Users can register more than one key with their account, and they can use the keys independently of each other.


The blockchain key creation does not cost anything and only takes a minute of your time. Click the green **Next** and follow the step-by-step guide on How to add your blockchain key.

### Welcome to the CargoX Platform!

CargoX Platform requires that users digitally sign document transfers. Instead of a blue-ink signature and wet stamp of paper era, this happens electronically with a blockchain key.

**Blockchain key is your personal digital signature.** Without a blockchain key, no one else can send documents in your name – not even CargoX.

In the next step you will create your own digital signature, your own blockchain key.

 Adding a blockchain key is mandatory to use all the features of the CargoX Platform.

### Step 6: Congratulations, you are done!

Once you have completed the process of adding your blockchain key, your company registration is completed.

Please note that your user account is currently the only user account under your company, but you can easily create more user accounts for your coworkers.

The suggested next steps are:

- Verify information about your company or request information change. (Manage | My company | Company details)
- (OPTIONAL) If you are an EU company with VAT number verify your VAT number against VIES to qualify for invoices without the VAT applied. (Manage | My company | TAX settings)
- Verify or change your personal details like phone... You can also add your photo (Account | My profile)
- Create additional user accounts for your co-workers (Manage | Users)
- Purchase CargoX units to start the company verification process step 2 (manage | My company | Verification)
- Create additional user accounts for your co-workers (Manage | Users)
- Build your ecosystem and connect with other companies on the CargoX Platform (Manage | Contacts)

The complete CargoX Platform users manual is available for your convenience. We suggest that you start by familiarizing yourself with the CargoX Platform's workspace first.

If you have any questions, contact us at [support@cargox.io](mailto:support@cargox.io).

### Activating new user account

Your co-worker created a new CargoX Platform account for you. Follow these steps to set it up and get ready to use the CargoX Platform.

#### Step 1: Activate your account

To activate and start using the account, **click on the link in the received email**.

This will take you to the web page where you can **set your login password**.

#### Note

Be sure to use a password that is at least 10 characters long and uses a combination of numbers, letters, and symbols.

After you click the green **Activate account button**, your new CargoX Platform account is activated.

#### Step 2: Add your blockchain key

You will be automatically logged into the CargoX Platform. Next time you can log in at (<https://cargox.digital>) using your username (email) and password.


On your first login, you will see the invitation to set up your own digital signature (blockchain key). This is mandatory to unlock all features of the CargoX Platform.

## Welcome to the CargoX Platform!

CargoX Platform requires that users digitally sign document transfers. Instead of a blue-ink signature and wet stamp of paper era, this happens electronically with a blockchain key.

Blockchain key is your personal digital signature. Without a blockchain key, no one else can send documents in your name – not even CargoX.

In the next step you will create your own digital signature, your own blockchain key.

 Adding a blockchain key is mandatory to use all the features of the CargoX Platform.

Next

To continue, click the green **Next** and follow the step-by-step guide detailed in How to add your blockchain key.

### Step 3: Congratulations, you are done!

Once you have completed the process of adding your blockchain key, your user account registration is completed.

The suggested next steps:

- Verify information about your company or request information change. (Manage | My company | Company details)
- (OPTIONAL) If you are an EU company with VAT number verify your VAT number against VIES to qualify for invoices without the VAT applied. (Manage | My company | TAX settings)
- Verify or change your personal details like phone... You can also add your photo (Account | My profile)
- Create additional user accounts for your co-workers (Manage | Users)
- Purchase CargoX units to start the company verification process step 2 (manage | My company | Verification)
- Create additional user accounts for your co-workers (Manage | Users)
- Build your ecosystem and connect with other companies on the CargoX Platform (Manage | Contacts)

The complete CargoX Platform users manual is available for your convenience. We suggest that you start by familiarizing yourself with the CargoX Platform's workspace first.

If you have any questions, contact us at [support@cargox.io](mailto:support@cargox.io).

## Logging-in

### Login

The CargoX Platform supports **two direct login methods**.

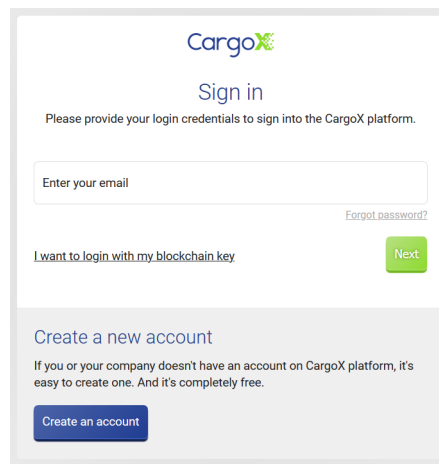
All users can log in using the **username and password** (unless they disable password login in the *My Profile* settings).

Users with an active **blockchain key** linked to their account can choose to log in using their blockchain key. Users can create and add blockchain keys to their accounts in *My Profile*.

Each account can have both methods enabled. Users can select which login method they will use for each login independently.

#### Option 1: The username and password login

This is the simplest way to log into the CargoX Platform, and a default setting for new user accounts.



To login, open the CargoX Platform login page (<https://cargox.digital>) with any modern browser check about the minimum requirements). Enter your email address as a username and click **Next**. On the next page enter your password to log in (*if you forget your password, you can trigger the password reset by clicking "Forgot password?"*).

When you are logged in, you can access most of the functions available to you, depending on the access permission of your account.

As soon as you initiate an action that involves a blockchain transaction, if again you have permissions by your company to perform this action, and if you have an active blockchain key associated with your account, the CargoX Platform will prompt you to unlock your blockchain key.

### Note

A blockchain key can be configured for every user in the My profile section. Every user can use multiple blockchain keys.

### Note

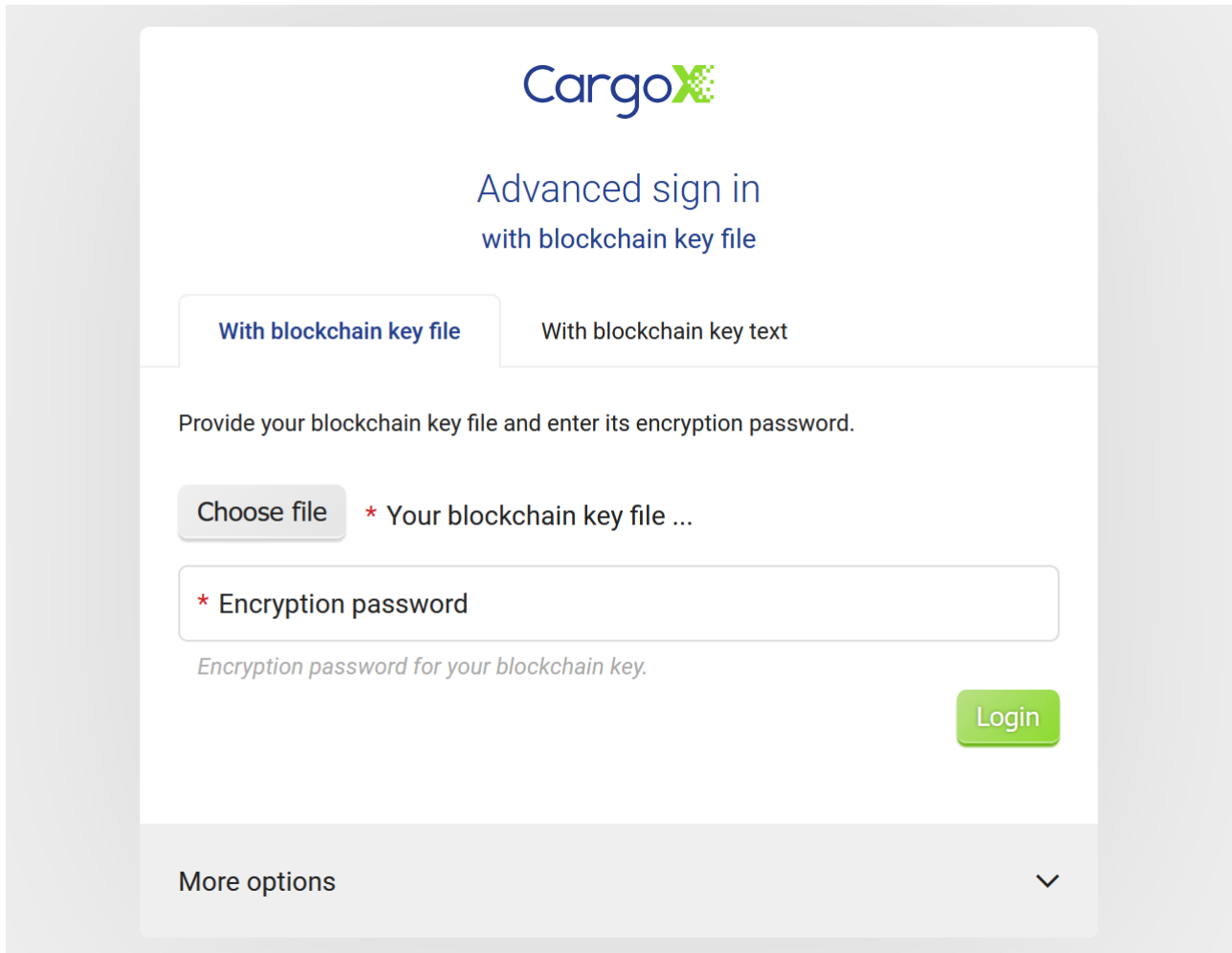
A user does not need a blockchain key linked to his account if his role is only non-transactional: read-only access to all documents (received, sent, archived and drafts) on a corporate account, preparing drafts of the documents and smart envelopes, or managing other company users.

### Option 2: The blockchain key login

**If your CargoX account has a blockchain key linked, you can log into the CargoX Platform using your blockchain key.**

This type of login enables all the functionalities of the CargoX Platform (if the user has all permissions), including functions that initiate blockchain transactions, such as sending documents or releasing cargo.

To log in using your blockchain key, open the CargoX Platform login page with the browser that is compatible with your blockchain key method, and click the **I want to login with my blockchain key**.



The screenshot shows the 'Advanced sign in with blockchain key file' section of the CargoX login page. It features two tabs: 'With blockchain key file' (selected) and 'With blockchain key text'. Below the tabs, a instruction reads: 'Provide your blockchain key file and enter its encryption password.' There are two input fields: a file selection button labeled 'Choose file' followed by the text '\* Your blockchain key file ...', and a password field labeled '\* Encryption password'. A hint below the password field says 'Encryption password for your blockchain key.' A green 'Login' button is positioned to the right of the password field. At the bottom, there is a 'More options' link and a downward arrow icon.

CargoX

### Advanced sign in with blockchain key file

**With blockchain key file**    With blockchain key text


Provide your blockchain key file and enter its encryption password.

**Choose file**    \* Your blockchain key file ...

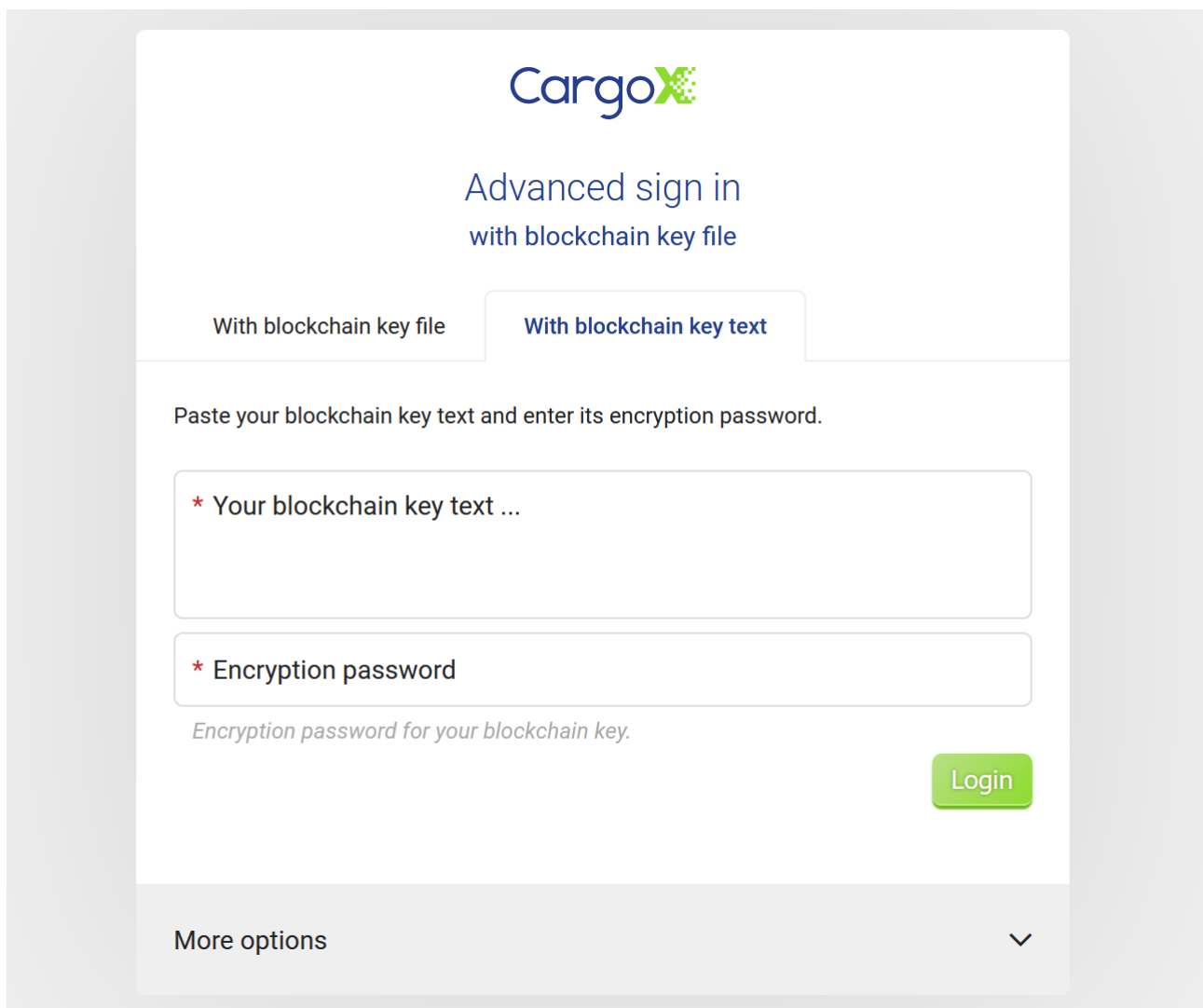
\* Encryption password

*Encryption password for your blockchain key.*

Login

More options 

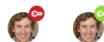
If you created a blockchain key using CargoX Platform, click the Choose file button and select your downloaded blockchain key file from your computer. Provide the encryption password for your blockchain key file in the field below and click the green **Login** button. Now your blockchain key is unlocked in your browser.



The screenshot shows the 'Advanced sign in' page for CargoX. At the top is the CargoX logo. Below it, the heading 'Advanced sign in with blockchain key file' is displayed. There are two tabs: 'With blockchain key file' (selected) and 'With blockchain key text'. The main instruction is 'Paste your blockchain key text and enter its encryption password.' Below this are two input fields: the first is labeled '\* Your blockchain key text ...' and the second is labeled '\* Encryption password'. A note below the password field says 'Encryption password for your blockchain key.' To the right of the password field is a green 'Login' button. At the bottom, there is a 'More options' link with a downward arrow.

If you were unable to download the blockchain key file at the time of blockchain key creation, choose the second tab titled **With blockchain key text**. Click on the larger field and paste your blockchain key text from the document where you saved it. Provide your blockchain key's encryption password in the field below and click the green **Login** button. Now your blockchain key is unlocked in your browser.

In the upper right corner of the screen (your avatar or photo) you will immediately see that your blockchain key is unlocked and ready to sign blockchain actions (green key icon) or still locked (red key icon).



#### **Other blockchain key login options**

For logging in with hardware wallets like Trezor and Ledger, and for other supported blockchain key types, select the **More options** in the blockchain key login window, then select your method.

If your method is grayed out, you might be trying to use it in an unsupported browser.

The screenshot shows the 'Advanced sign in with blockchain key file' page on the CargoX platform. At the top, the CargoX logo is displayed. Below it, the title 'Advanced sign in with blockchain key file' is centered. There are two tabs: 'With blockchain key file' (selected) and 'With blockchain key text'. The main instruction reads: 'Provide your blockchain key file and enter its encryption password.' Below this, there is a 'Choose file' button and a text input field labeled '\* Your blockchain key file ...'. Another text input field is labeled '\* Encryption password'. A small note below the password field states: 'Encryption password for your blockchain key.' A green 'Login' button is positioned to the right of the password field. Below the login section, there are several recommendations for hardware wallets and other login methods, each with a 'RECOMMENDED' tag and a 'Buy now' link: 'Trezor Hardware Wallet', 'Ledger Hardware Wallet', 'BC Vault Hardware Wallet', 'MetaMask', 'Mnemonic Phrase', and 'Private Key'. At the bottom, there is a link to 'Back to password sign in'.

Log in with your blockchain key.

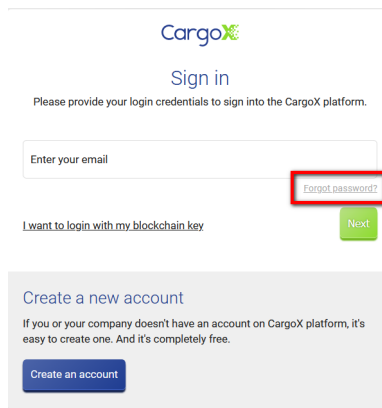
Detailed information about specific blockchain key login types is provided here:

- Ledger
- Trezor
- MetaMask
- Private key and Mnemonic phrases are supported, but we strongly advise the use of hardware wallets, or at least a MetaMask software wallet.

### ***I forgot my password. Now what?***

#### **Step 1:**

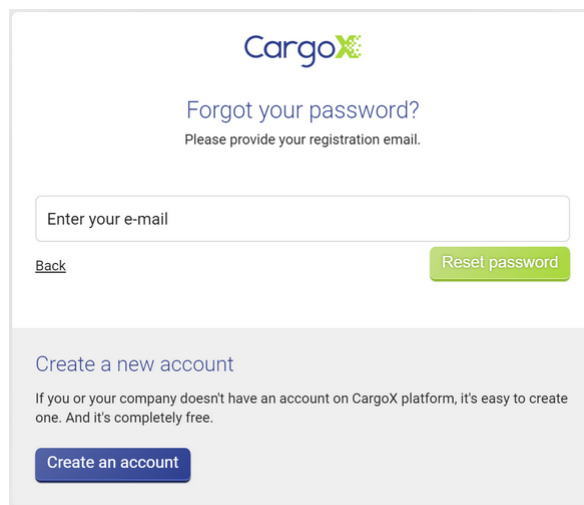
To reset your password, click the **Forgot password?** link on the CargoX Platform login page:



The image shows the CargoX 'Sign in' page. At the top is the CargoX logo. Below it, the text 'Sign in' is followed by 'Please provide your login credentials to sign into the CargoX platform.' There is a text input field labeled 'Enter your email'. To the right of this field is a red rectangular button labeled 'Forgot password?'. Below the email field is a link 'I want to login with my blockchain key' and a green 'Next' button. At the bottom, there is a section titled 'Create a new account' with the text 'If you or your company doesn't have an account on CargoX platform, it's easy to create one. And it's completely free.' and a blue 'Create an account' button.

## Step 2:

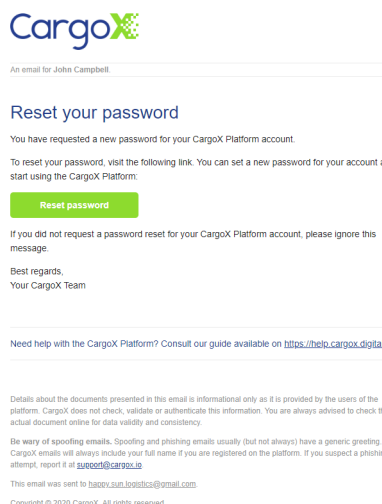
On the next page, enter your username (email) address and click the green **Reset password** button.



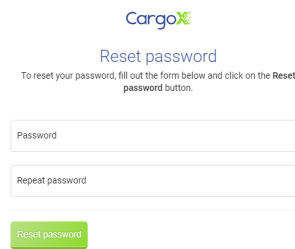
The image shows the CargoX 'Forgot your password?' page. At the top is the CargoX logo. Below it, the text 'Forgot your password?' is followed by 'Please provide your registration email.' There is a text input field labeled 'Enter your e-mail'. Below this field is a blue 'Back' link and a green 'Reset password' button. At the bottom, there is a section titled 'Create a new account' with the text 'If you or your company doesn't have an account on CargoX platform, it's easy to create one. And it's completely free.' and a blue 'Create an account' button.

## Step 3:

Open your email. Shortly an email from the CargoX Platform should arrive. Click on the green button will open a CargoX Platform password reset webpage where you will be able to set a new password for your account.



The image shows an email from CargoX. At the top is the CargoX logo. Below it, the text 'An email for John Campbell.' is followed by 'Reset your password'. The main body of the email says: 'You have requested a new password for your CargoX Platform account. To reset your password, visit the following link. You can set a new password for your account and start using the CargoX Platform.' Below this text is a green 'Reset password' button. Further down, it says: 'If you did not request a password reset for your CargoX Platform account, please ignore this message.' followed by 'Best regards, Your CargoX Team'. At the bottom, there is a link 'Need help with the CargoX Platform? Consult our guide available on <https://help.cargox.digital>'. The footer contains a disclaimer about the email being informational only, a warning about spoofing emails, and contact information for support.



CargoX

Reset password

To reset your password, fill out the form below and click on the Reset password button.

Password

Repeat password

**Reset password**

**Step 4:**

Log into the platform using your username (email) and new password.

***I lost my blockchain key, or forgot the password. Can I retrieve it?***

**Warning**

CargoX does not have access and can not restore the private keys of users.

Always create a backup of your blockchain key file or blockchain key text and its encryption password!

**Step 1: Give it another try****Try to find your blockchain key:**

- If you **downloaded blockchain key file**, try to find the file - usually, people download it either into the *Download* or *Desktop* folders. By default, the filename looks similar to this: **CargoX - Blockchain key - John Campbell - 0x94ffEB1b2277645f1022DcdD3B3819F974a3e96E.json** where the first part includes your first and last name, and the last part is your public blockchain address (which you can find in your CargoX account's My profile under Privacy & Security tab). Could it be that you followed the on-screen instructions, and created a copy of the downloaded file on an external USB key/drive?
- If at the time of creating the blockchain key you were unable to download the file, you might have decided to copy your blockchain key text into the clipboard. You would probably have **saved it in a document on your computer**. Try to remember where and when, maybe you can find it. The blockchain key text is represented by 521 characters of text (without any spaces and split lines).

**If you have the above blockchain key file or blockchain key text, but can not remember the decryption password for the blockchain key:**

- When you were asked to select the encryption password, we suggested that you do not repeat the same password that you used for the login (but some users do that anyhow). Also, we requested that the password is at least **8 characters long**, and suggested that includes letters, numbers, and special characters.

**Step 2: If that did not work**

If you had no luck finding the blockchain key, then to solve the situation, please do the following:

**Step 2.1:**

Log into your CargoX account with your username (email) and password

**Step 2.2:**

Go to the **My profile** into the **Privacy & Security** tab and click **Add new Blockchain key**.

**Step 2.3:**

Create a new blockchain key, and link it to your CargoX account.

**Step 2.4:**

**Create a backup copy of this new key. Write down its password to a safe place. We suggest this safe place is not the same place where the key is stored.**

### Step 2.5:

Once you complete previous tasks, ask a co-worker that has a CargoX Platform account and an active blockchain key (and proper permissions), to log into CargoX Platform, and approve your new blockchain key (instructions).

**If you are the only person under your company who had an active blockchain key**, we can help you with activating your blockchain key, but for your own protection, you need to pass the CargoX Concierge verification first. Call our support center at +1 512 647 2040 (US) or +386 1 82 82 006 (Slovenia, EU) **from the phone number that you entered into your CargoX account**. Choose English menu (1), and then choose activation of your blockchain key (4). Follow the instructions. After you complete the call send us the email at [support@cargox.io](mailto:support@cargox.io) **from the email connected with your CargoX account**.

Thanks to CargoX Concierge Service you do not have to worry about anything, as nothing is irreversibly lost.

### Step 2.6:

You will receive an email notification when your new key is approved.

Please create a backup of the new key (and password).

### Note

**CargoX Concierge Service** allows us to help you in case you lose your blockchain key or forget its password.

Additional documents and personal verification will be required from the initiator before CargoX is allowed to step in.

CargoX Concierge Service is currently provided free of charge to all users for up to one (1) incident yearly. Further interventions are charged per our price list.

You can decide to opt-out from CargoX Concierge Service, but in that case, you are completely responsible for your blockchain keys, and in case of a problem CargoX can not help you. To opt-out write to [support@cargox.io](mailto:support@cargox.io).

## Managing company details

### Review your personal and access details (My profile)

### Attention!

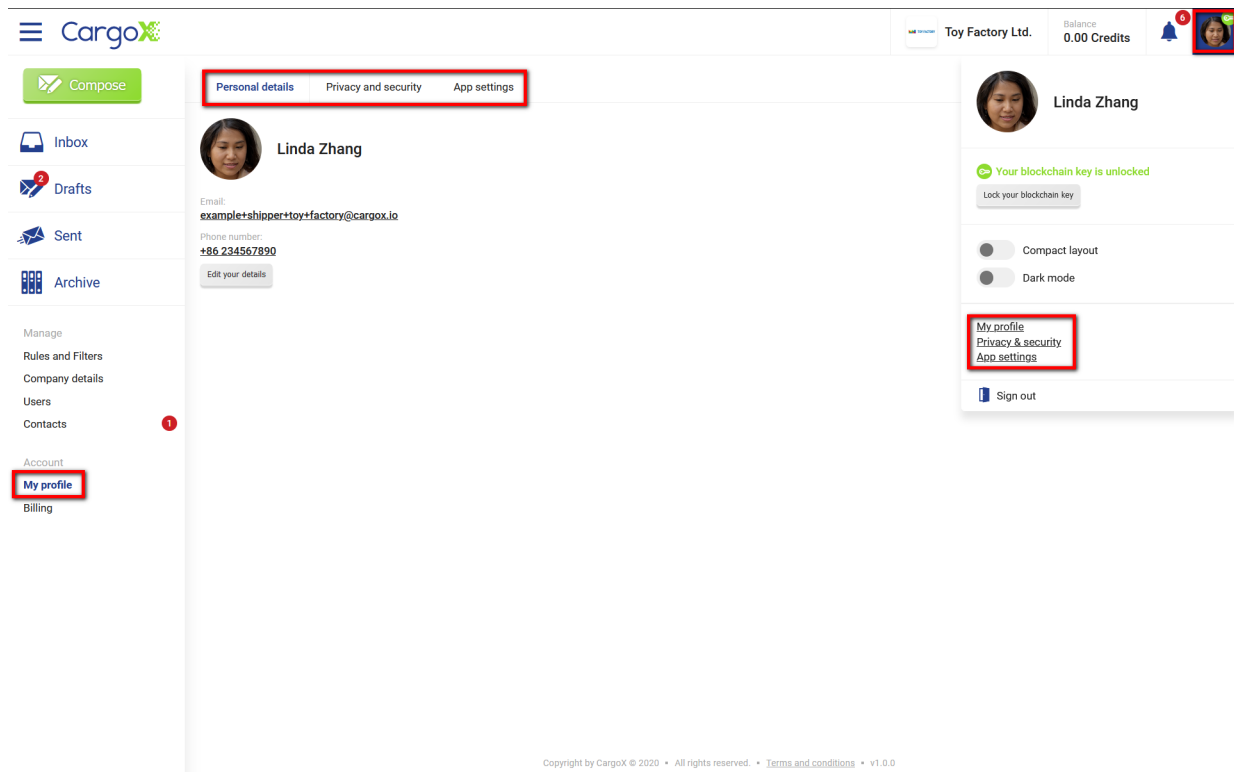
*Quick instructions: To prepare your account for full access you must complete personal profile. Go to My profile, click the Edit your details button. Enter your data, including phone number and title. Optionally upload your avatar photo. Save changes. You are done.*

*You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).*

To access **My profile** page, click **Account | My profile**. You can also access it directly by clicking your avatar icon and choosing one of the My profile links at the bottom.

You can review your permissions, change your personal details, change the password, and set up your blockchain key(s). You can also review your last login events and attempts.

The page is divided into **Personal details**, **Privacy and security**, and **App settings** tabs.



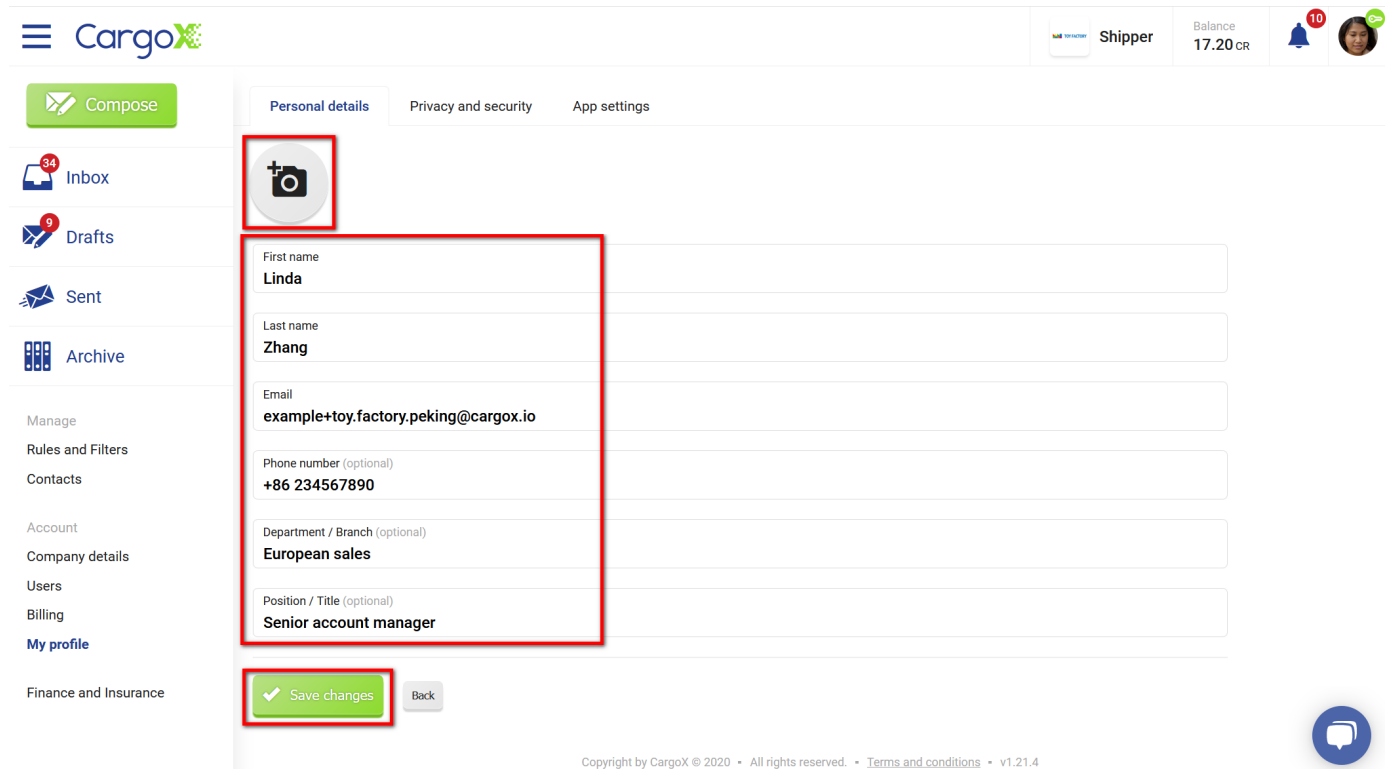
You can review your personal details here.

You start only with an email address, but should now add your other contact details and data: phone, department, your position. Click the **Edit your details** button.

### Personal details

Now you can edit all fields. Do not forget to click on the **Add / change image** button and upload your avatar photo - displayed in the right top corner.

After you add all the information, click the **Save changes** button to finish.



## Privacy & Security

This tab gives you the possibility to change your access details - blockchain key and password. You can also review your last logins and view the set permissions of your account.

### Your blockchain keys

All blockchain keys linked to your account are displayed below. You see a specific blockchain key's public address, type, when it was added, and also whether it is currently active. Users can have several blockchain keys and use them independently.

The green word **Active** next to the blockchain key means that this blockchain key was authorized and can sign transactions on behalf of your company.

To add a new blockchain key, click the **Add new blockchain key** button, and follow the step-by-step instructions to add a blockchain key.

When you add a new blockchain key, you must activate it before you can use it. Depending on your account's permissions, you can activate the key yourself, or your co-worker with administrative rights can do it for you. In this case, you will get an email notification once your blockchain key is activated.

The same is true for disabling the blockchain key. This procedure can be initiated by clicking the **Disable** button. If the key was added, but not yet activated, you can also remove it by pressing the **Remove** button.

**Your blockchain keys**

These are all the blockchain keys linked to your account. You can use blockchain keys to log into the platform, and to confirm blockchain-related operations.

Public address	Key type	Date added	Status	
0xe481d1fED8F9274d570624CaCCD63Ec2E0378b6B	Mnemonic Phrase	1 Apr 2020 at 16:17 2 days ago	Active	Disable
0xc1B8C5Fe3e21060d6Bd23e331043d8F02a560dA	Private Key	31 Mar 2020 at 10:02 3 days ago	Active <b>CURRENTLY UNLOCKED</b>	Disable
0xCc54DD4f4D079524A1C417bC2E2c2530179c6337	Metamask	1 Apr 2020 at 16:38 2 days ago	Active	Disable
0x97160A079D42ec800d56e3108008CC2bF2B8F5Fe	Keystore File	1 Apr 2020 at 16:16 2 days ago	Pending approval	Approve
0x4350ccf199c336d46701E099AF55d4f9235e5082	Trezor Hardware Wallet	1 Apr 2020 at 16:09 2 days ago	Active	Disable
0x66750E050dB88c597972e27F8b7A3B6C45b99C4c	Ledger Hardware Wallet	1 Apr 2020 at 16:14 2 days ago	Active	Disable
0x9ff94994CeeCE0755f9E442D10dc7610a536e053 <b>SUCCESSFULLY ADDED</b>	Metamask	3 Apr 2020 at 12:59 in a few seconds	Pending approval	Approve Remove

[+ Add new Blockchain key](#)

### Login with password

By default, all user accounts can use a username and password to login to the platform, as indicated in the green message. You can change this and only use blockchain key(s) to login to the platform.

**Login with password**

Your email address and password may be used to login into the platform. This might be more convenient than using your blockchain key. However, performing blockchain-related operations, such as transferring a document, still requires a blockchain key.

✓ Login with password is enabled for this account

[Change password](#)

You can also change your login password by clicking on the **Change password** button and by entering your current and new passwords.

**Login with password**

Your email address and password may be used to login into the platform. This might be more convenient than using your blockchain key. However, performing blockchain-related operations, such as transferring a document, still requires a blockchain key.

Current password

Password


Repeat password

### Login history

As a security feature, you can review your last login attempts. You can check the timestamp and IP addresses from which the login was attempted. If all of them are marked **successful** and come from your IPs then you are OK. If this is not the case, someone might be trying to hack your account. In this case, you might want to consult with your security officer or contact [support@cargox.io](mailto:support@cargox.io).

## Login history

 Search ...

 Time	Method	IP Address	Device	Status
3 Apr 2020 at 12:56 21 minutes ago	Private Key	172.20.48.71	Firefox 74 on Windows 10	Successful
3 Apr 2020 at 10:18 3 hours ago	Private Key	172.20.61.115	Chrome 80 on Windows 7	Successful
2 Apr 2020 at 23:20 14 hours ago	Private Key	100.127.202.64	Firefox 74 on Windows 10	Successful
2 Apr 2020 at 15:40 a day ago	Private Key	172.20.61.115	Firefox 74 on Windows 10	Successful
2 Apr 2020 at 14:08 a day ago	Private Key	100.127.202.64	Firefox 74 on Windows 10	Successful

[View older login history log](#)

## App permissions

At the bottom of the screen you can review permissions for your CargoX account. These were set by the company administrator(s) when they created the account for you. Click here for a detailed explanation of the permissions.

### App permissions

#### Envelope permissions

- ✓ Document creator
- ✓ Document manager

#### Company permissions

- ✓ Company manager
- ✓ Legal representative

#### Contacts permissions

- ✓ Contacts manager

#### Rules permissions

- ✓ Rules manager

## App settings

The last tab shows the options available for customizing your user experience.

If you are using a mobile device or a computer with a small screen, you can check out the **compact layout** mode.

If you prefer the black background, you can activate the **dark mode**.

Both settings do not affect any functionality, as they have a visual impact only.

## Company profile

Every company is responsible for keeping their information correct and up to date.

In the My company section you can also start the company's verification process. Open the Get verified tab to continue.

If you are EU-based company, you will see the third tab called Tax settings, where you can verify your VAT number against VIES database. Successfully verified companies will not have VAT applied when buying units (per reverse charge of EU VAT taxation rule).

### Note

Only a user with the Company manager permission can change the Company information and logo.

### Note

After the new registration of the company, please verify your company details and also your own profile before performing certain actions (like initiating verification request or connections with other companies on the CargoX Platform).

## Warning

**All company details changes are verified by CargoX** You can change your company information at any time, but changes will not be applied until CargoX staff checks them in order to assure security and to prevent spoofing/impersonating attempts.

## Attention!

*Quick instructions: To prepare your account for full access you must complete and verify company details. Go to **My company** | **Company details**, click the **Edit company details** button. Enter company's data, including address, city, zip, VAT number and website. Upload company's logo. Save changes. You are done.*

*You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).*

### Step 1: Go to Company details

To verify and, if needed, update your company and contact information, go to **Account | My company** in the side menu and select **Company details** tab. You can also click directly on the company name at the top right of the screen.

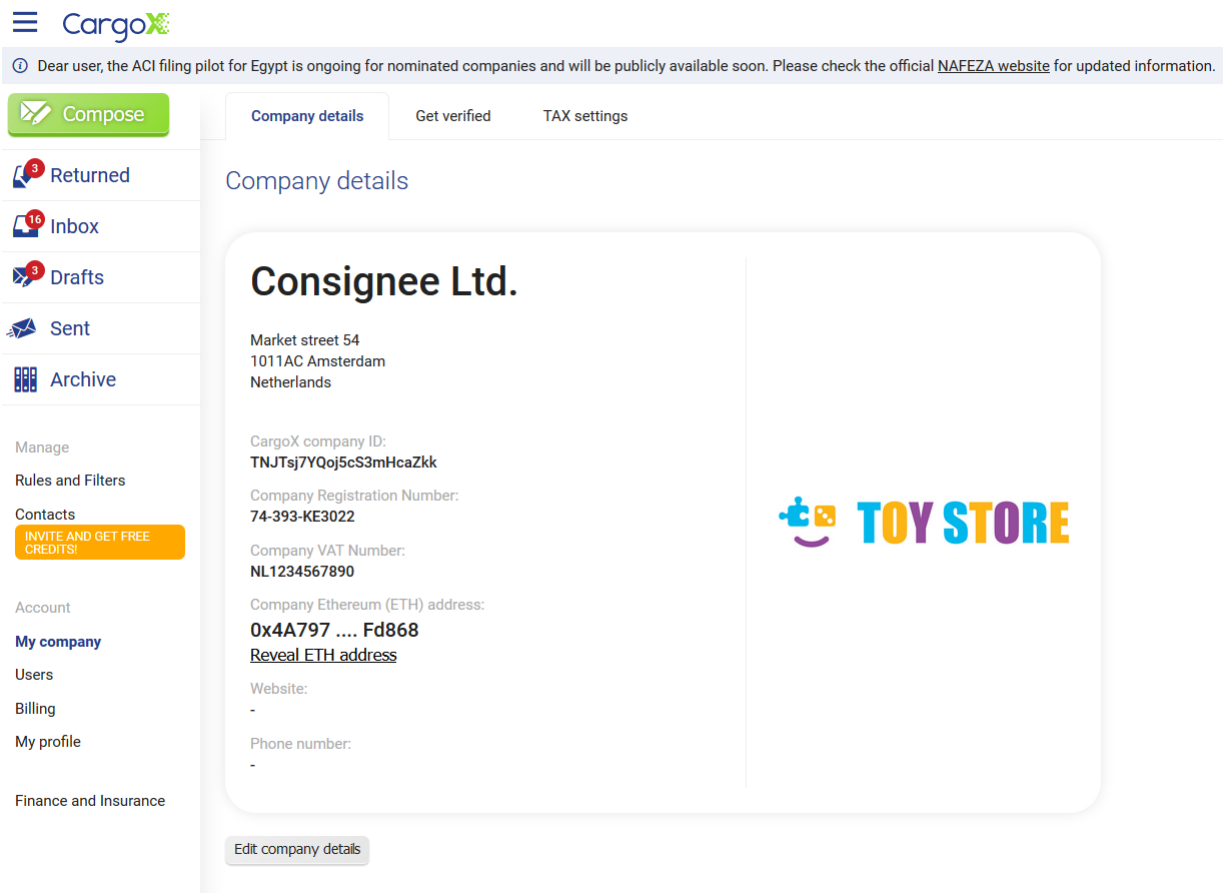
The screenshot shows the CargoX web application interface. In the top right header, a button labeled 'Carrier' is highlighted with a red box. In the left sidebar, under the 'Account' section, the 'My company' menu item is highlighted with a red box. The main content area displays a list of envelopes with details such as sender, document type (e.g., MAWB, OTHR, COO), and dates.

### Step 2: Edit Company

You will see the details about the company, including the name and address of the company, the national registration number and tax/vat number (if applicable). There is also CargoX ID of your company, sometimes needed for the ACI processes.

You can also see the first and last characters of the company's public blockchain address and the logotype. To view the full blockchain public address click the **Reveal ETH address**.

To change information, click the **Edit company details** button below.



### Step 3: Change information and add the company logo

You can now edit all company-related information. Some fields are optional.

To change the logo, just click on the icon and provide a new file from the local disk.

Compose

Inbox

Drafts

Sent

Archive

Manage

Rules and Filters

Contacts

INVITE AND GET FREE CREDITS!

Account

My company

Users

Billing

My profile

Finance and Insurance

Help

Company detailsGet verified

Company details

\* Company name  
Carrier

Branch office (optional)

\* Address  
Dongcheng Qu 332

Address 2 (optional)

\* ZIP / Postal code  
200000

\* City  
Shanghai City

\* Country  
China

\* Company registration number  
1234567890

VAT number (optional)  
CN56789123

Phone number (optional)


Website (optional)

DUNS number (optional)

EORI number (optional)

LEI number (optional)

All company details changes need to be reviewed by CargoX. This is a security measure to prevent fraudulent company details.

HappySun Logistics

Change image

Submit changesBack

Click the **Save changes** to continue.

**Carrier**

Dongcheng Qu 332  
200000 Shanghai City  
China

CargoX company ID:  
4FCUTu5om7YND9yM

Company Registration  
1234567890

Company VAT Number  
CN56789123

Company Ethereum (E)  
0xfCa07 .... 6857  
[Reveal ETH address](#)

Website:  
-

Phone number:  
-

**Confirm company details changes**

⚠ You have made changes to key fields. If you submit these changes, understand that your company verification will be void. You will lose your VERIFIED badge and will need to re-run the verification.

You are requesting the following changes:  
Company name: From Carrier to Carrier Corp

To confirm this request, click the **Confirm** button.

**Close** **Confirm**

ⓘ A request to change your company details is currently under review. You will be notified when it is resolved.  
Requested changes are:  
Company name: From Carrier to Carrier Corp

Changes were requested by John Campbell on 22 Apr 2021 at 02:08.

Note that if you have already completed company verification process, any key data change will reset your status, and you will have to verify again.

## Company Tax Settings

### Note

Only EU-based companies will see the **Tax settings** tab within **My company** page.

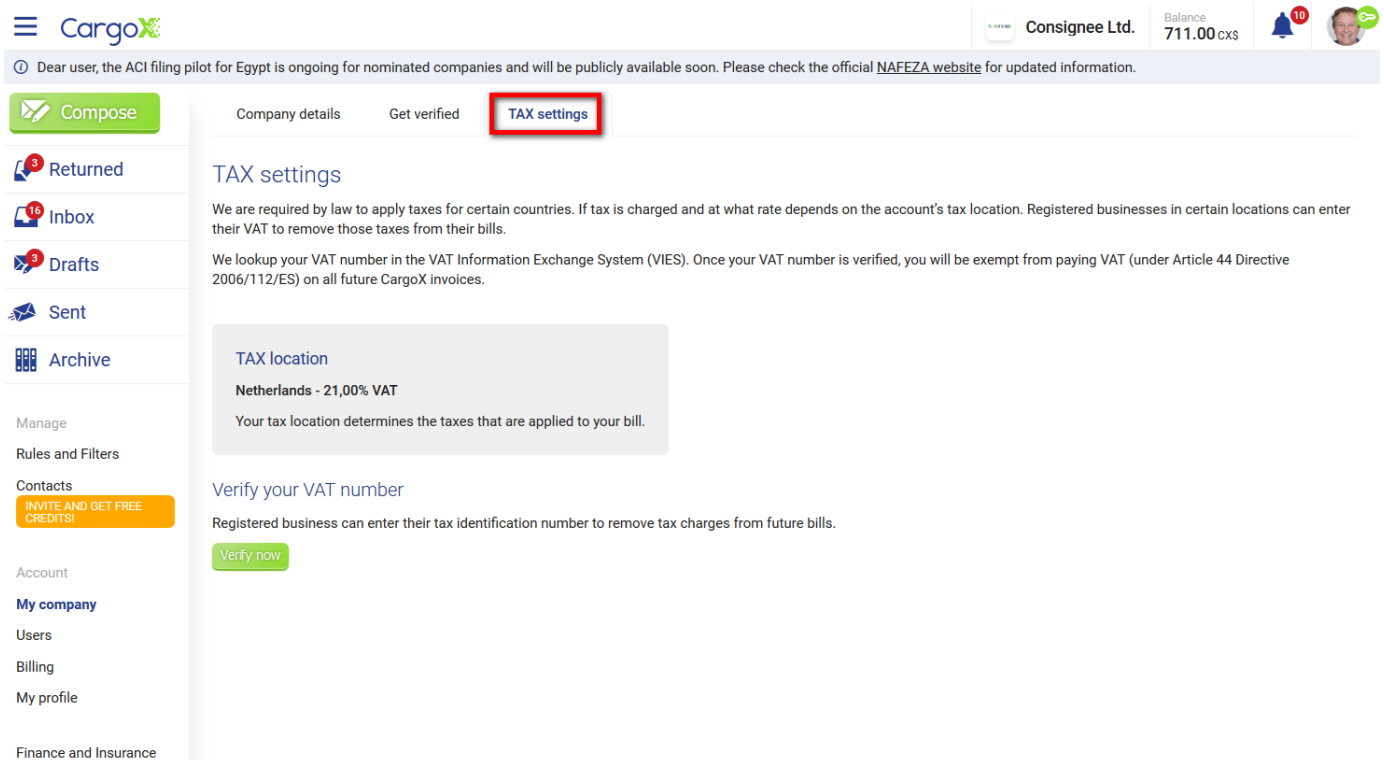
### Note

Only a user with the Company manager permission can initiate the VAT verification.

If you are EU-based company, you will see the third tab called **Tax settings**, where you can verify your VAT number against VIES database. Verifying your VAT number against VIES is **optional**.

On the page you can see your VAT location (Country) and your country's VAT rate. According to the EU law, when selling services, we are obliged to charge VAT at the rate of the country of the buyer.

The only exception is if the buyer / company is VAT eligible, as in this case the reverse charge - VAT exempt applies under Article 44 Directive 2006/112/ES. We are using the EU's VIES database to verify VAT-eligible companies.



Dear user, the ACI filing pilot for Egypt is ongoing for nominated companies and will be publicly available soon. Please check the official [NAFEZA website](#) for updated information.

Compose

Returned

Inbox

Drafts

Sent

Archive

Manage

Rules and Filters

Contacts

INVITE AND GET FREE CREDITS!

Account

My company

Users

Billing

My profile

Finance and Insurance

Company details Get verified **TAX settings**

### TAX settings

We are required by law to apply taxes for certain countries. If tax is charged and at what rate depends on the account's tax location. Registered businesses in certain locations can enter their VAT to remove those taxes from their bills.

We lookup your VAT number in the VAT Information Exchange System (VIES). Once your VAT number is verified, you will be exempt from paying VAT (under Article 44 Directive 2006/112/ES) on all future CargoX invoices.

**TAX location**

Netherlands - 21,00% VAT

Your tax location determines the taxes that are applied to your bill.

**Verify your VAT number**

Registered business can enter their tax identification number to remove tax charges from future bills.

Verify now

To verify your VAT number against the VIES (European VAT database) click the green **Verify now** button below. Verifying your VAT in VIES is free of charge. After a short time the VAT status will update.

If your VIES verification was successful the VAT rate will be shown as 0%, and you will not have VAT applied when buying units (per reverse charge of EU VAT taxation rule).

If your VIES verification fails you will continue getting your national's VAT rate charged with every purchase. Please note that even with VAT applied, you should still be able to get VAT back from your local tax authority, as this is your entry VAT.

#### What can you do if VAT verification fails?

VIES verification can fail for a number of reasons. Most common problem is technical, as VIES service is sometimes not accessible. Trying again after a few minutes might solve your problem.

If it does not, verify the VIES on your own ([https://ec.europa.eu/taxation\\_customs/vies/](https://ec.europa.eu/taxation_customs/vies/)), by choosing your country and entering your VAT number.

If VAT number exists, but listed company details do not match your company details on the CargoX Platform we can not complete your VIES verification. Please change your company details to the official one. It should match one in VIES.

If your VAT number is not in the VIES database, or if there are no company details associated with it, we can not verify you. For some countries (Germany, Spain) this happens, because country decided it will not publicly show companies' data in VIES.

**If you would like to apply to be VAT verified in our system, please provide us with the following documents:**

**\*\*1)** A copy of the letter of incorporation (must be in English) **\*\***

**AND**

**2) Tax Certificate (date should be more recent than 3 months, must be in English OR translated to English by a court-appointed translator).**

Please send both in a clear and readable PDF document to [support@cargox.io](mailto:support@cargox.io) with a email subject: VAT verification for (enter your company name).

*Please note that VAT verification is OPTIONAL, as it only applies to the CargoX services invoices and VAT charged there and are not a prerequisite for other services accessible through the CargoX Platform (such as ACI filings etc). If you are a company, you will still be able to get the VAT back from your tax authority as this is your entry VAT.*

## Company Verification

### Note

Certain actions are only available to the Verified companies. Egyptian ACI filing is one such example, as the Egyptian customs require us to only allow ACI filing from verified exporters.

### Note

Only a user with the Company manager permission can initiate the verification process.

To begin the company verification process for your company, go to **My company** and click the **Get verified** tab.

Company verification process on the CargoX Platform consists of one internal and two external checks. Passing all 3 steps is mandatory to reach the verified status.

### Step 1: Verify and complete your company details

Open **My company | Company details** and verify your company details. If needed, make changes by clicking the **Edit company details** button. **Be sure to verify and, if needed change and complete, this information before initiating the verification at step 3, as any later change will reset your verified status.**

CargoX uses public registry information to verify company details. As such the entered details should completely match the data in your country's official national company registry.

Make sure that your **Company's name, address, and ZIP code and city** matches the official company registry of your country, as this will allow you to smoothly pass the verification at step 3.

Double-check your **company's legal entity identifier or registration number, as found in the official national company registry** (number is usually issued by the governmental authority in the country of incorporation) and your **VAT or TAX number** if you have one. Optionally - if you have them - we strongly recommend that you enter all other identifiers such as DUNS, EORI and LEI numbers.

If you have not already, you can upload your **company's logo** (PNG, JPG or GIF formats only).

Dear user, the ACI filing pilot for Egypt is ongoing for nominated companies and will be publicly available soon. Please check the official [NAFEZA website](#) for updated information.

Company details | **Get verified** | TAX settings

### Get verified

Verify your company to increase your recognition between your partners. Verified companies acquire a special badge visible to its partners. Specific actions, such as ACI filing, are available only to verified companies.

Create your company profile

Your first step towards getting verified is done. Your company has an account at CargoX.

Buy credits via bank transfer

We verify the details provided by the bank if they match what we have on file.

Buy now

Verify your data via 3rd-party service

We use the details you provide to match them to official registry in your country.

**You will be charged 15.00 cxs for this verification. Only regular credits can be used for this service.**

**Some information is not filled out in your company details. It is highly recommended that you provide as many details as possible to increase chance of successful verification.**

Missing information: DUNS number, LEI number, EORI number, Telephone, Website

Edit company details | Verify now

### Step 2: Bank verification

Second part of the verification is tied to the identity provided by your bank.

To initiate step 2, purchase some units through the billing and pay via bank wire. You can start the process in the **Billing** section of the CargoX.

Payment must come from your company's bank account, as we use this information to match it against your company details. When the match is confirmed, the first part of your company verification is complete.

### Step 3: 3-rd party verification service

Complete the verification process by successfully passing the public registry check.

In the **My company | Get verified | Verify your data via 3rd-party service**, start the process by clicking the "Verify now" button below. Before starting the verification, please double check your company details, and enter all company identifiers that you have (such as DUNS, LEI, EORI...). **Please note that entering DUNS, LEI and EORI is OPTIONAL, and you can perform verification process without entering them. More information about your company we have to cross reference, higher the chance of a successful verification.**

You can complete steps 1 & 2 immediately, and step 3 once we receive your bank payment, as the cost for this final verification is 15 units (15 USD).

Dear user, the ACI filing pilot for Egypt is ongoing for nominated companies and will be publicly available soon. Please check the official [NAFEZA website](#) for updated information.

**Compose**

**Inbox**

**Drafts**

**Sent**

**Archive**

**Manage**

**Rules and Filters**

**Contacts**

**Account**

**My company**

**Users**

**Billing**

**My profile**

**Finance and Insurance**

**Company details** **Get verified**

### Get verified

Verify your company to increase your recognition between your partners. Verified companies acquire a special badge visible to its partners. Specific actions, such as ACI filing, are available only to verified companies.

**Create your company profile**

Your first step towards getting verified is done. Your company has an account at CargoX.

**Buy credits via bank transfer**

We verify the details provided by the bank if they match what we have on file.

**Verify your data via 3rd-party service**

We use the details you provide to match them to official registry in your country.

## Note

**In case your company verification FAILS:** Before retrying, please double-check your company details to make sure they match the official record. If your company verification fails again, you need to provide us with an **official document issued by your government that contains your company name, address, registration number, and tax number (if applicable).**

This can either be a certificate or an official letter of incorporation, a certificate of business registration, a business license for your company, or a printout from the official government registry of corporations. The document should be more recent than 3 months and **must be issued in English OR translated to English by a court-appointed judicial translator (or a notary in China).**

**The information must match the details in your CargoX company account.** Please send a clear and readable PDF document to [support@cargox.io](mailto:support@cargox.io) with an email subject: Company verification for your-company-name.

## Warning

Your verification status will be void, should you change your company name, address, registration number or tax/VAT number in *My company* | *Company details*. You will need to restart the 3-rd party verification step again.

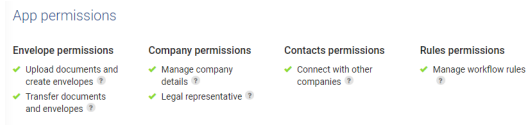
## User access rights / Application permissions

The CargoX Platform users management system offers very granular access rights through the configuration of user privileges and permissions. This enables companies to use the CargoX Platform without the need to change their internal processes and document workflows.

## Permission overview and explanation

## Note

You can access a short explanation of individual rules by hovering the mouse pointer over the "?" icon next to the permission.



### 1. Envelope permissions

These permissions are used to manage sending documents (envelopes). If the user is not permitted to send envelopes, user will still have a read-only access to the company's account. The user can view all documents in Inbox, Drafts, Sent and Archive (and other) folders. The user will be able to also download any document, but he will not be able to do anything else with it.

- **Upload documents and create envelopes, aka "document creator"** - Allow the user to create a new **Envelope**, upload a new document, or attach a received document from the Inbox (by using the forward function). The user will also be allowed to seal the document (and choose the recipient), however, he will not be allowed to initiate the transfer.
- **Transfer documents and envelopes , aka "document manager"** - Allow the user to transfer the envelope, and to perform advanced functions, such as accomplish/release cargo, destroy document, clear history...

### 2. Company permissions

Permissions for the administration of your company CargoX account and to manage users.

- **Manage company details, aka "company manager"** - Allows the user to add new users, manage their permissions/rights, and remove users from the company. The user can approve and disable the users' blockchain keys. This user is allowed to update the company details and purchase units (in the Billing section).
- **Legal representative** - This setting is intended for users with the authority to represent their company and accept the CargoX Terms and Conditions. These terms and conditions (TOS) are legally binding for the company. This action is mandatory after each TOS change - until the new terms are accepted, company can not use CargoX.

### 3. Contacts permissions

- **Connect with other companies, aka "contacts manager"** - Allows the user to establish connections with other companies on the CargoX Platform on behalf of his company. This includes sending out invitations to other companies and accepting the received invitations from other companies.

### 4. Rules permissions

- **Manage workflow rules, aka "rules manager"** - Allows the user to set up new filters and rules for email notification of received smart envelopes.

## Adding new users

## Note

Only a user with the **"Manage company details" aka "company manager"** permission is able to add new users and manage them.

You can easily create accounts for your co-workers under your Company account in the CargoX Platform. Each company can have unlimited user accounts. To track users and hold them responsible for their actions we recommend that each user has their own account.

CargoX users management system offers very granular access rights via the configuration of user privileges and permissions. This enables companies to use the CargoX Platform without a need to change their internal processes and document workflows.

Users can use a simple login (username and password) to view and prepare documents. To transfer documents they will need to add a blockchain key to their account. They will also need to have permission to transfer documents, which can be added or removed in the user management view.

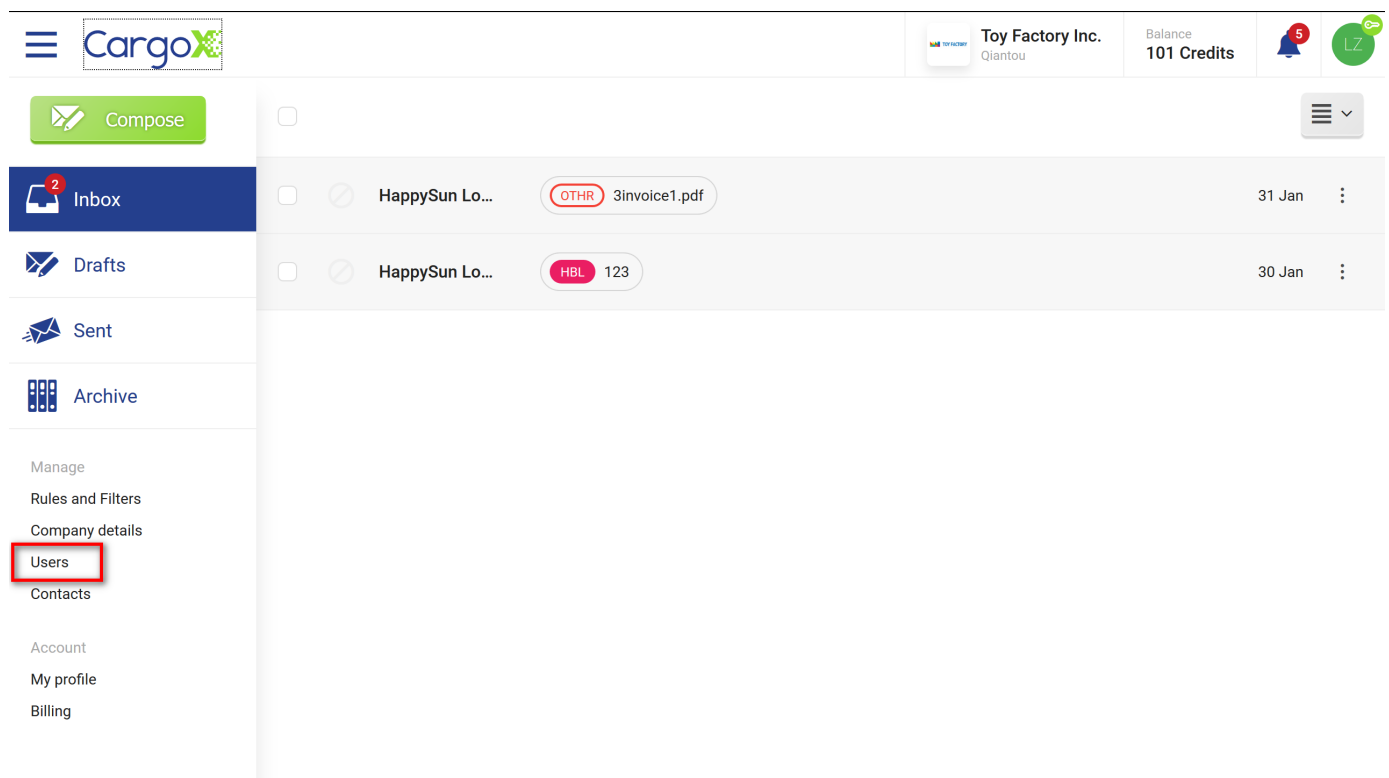
## Attention!

*Quick instructions: To create a new user account for your co-worker, go to Users and click the green +Add user button. Enter co-worker's details and click Next. Select permissions this account will have. Complete with clicking the green Add user button. You are done.*

*You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).*

### Step 1: Access user management

To access user management, go to **Manage | Users**.



### Step 2: User overview

The user management page provides an overview of all existing users, including their email, blockchain key address, last login information, and their permissions.

To add a new user, click the green **Add user** button.

The screenshot displays the CargoX platform interface. At the top, the CargoX logo is on the left, and the user profile 'Toy Factory Inc. Qiantou' with a balance of '101 Credits' is on the right. The left sidebar contains navigation links: Compose, Inbox, Drafts, Sent, Archive, Manage (Rules and Filters, Company details, Users, Contacts), and Account (My profile, Billing). The main content area is titled 'Users' and includes a search bar and a '+ Add user' button (highlighted with a red box). Below this is a table of users.

User	Email	Phone number	Password	Blockchain ID	Last login	Permissions
Linda Zhang YOU	example+shipper+toy+factory@cargox.io	-	✓ Enabled	Keystore File 0xCC1825f42bc5cB4394aEB10D0b8B9cAEC09F7f34	31 Jan 2020 at 12:20 2 hours ago via Password	Administrator (all)

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### Step 3: Add a new user - basic information (1/2)

Fill out the user information and click Next. Some fields are optional and you can leave them empty.

Add new user

Personal details

App permissions

\* First name

Michael

\* Last name

Bolton

\* Email

bolton@toystore.com

\* Phone number

12345678

Department / Branch (optional)

Position / Title (optional)

☒ Declaration of Authorisation. We hereby authorise Michael Bolton to act on our behalf on CargoX platform.


You need to agree with the Declaration of Authorisation to add a new user!

Close


Next

#### Step 4: Add new user - Permissions (2/2)


Select the permissions (access rights) the user will have. You can use the **Select all** button to select all permissions. [Click here for a detailed explanation of permissions.](#)



## Add new user



Personal details



Personal details

### Choose user permissions

**Envelope permissions** ([select all](#))

- ☒ Upload documents and create envelopes ?
- ☒ Transfer documents and envelopes ?

**Company permissions** ([select all](#))

- ☒ Manage company details ?
- ☒ Legal representative ?

**Contacts permissions** ([select all](#))

- ☒ Connect with other companies ?

**Rules permissions** ([select all](#))

- ☒ Manage workflow rules ?

Back
✓ Add user

Once done, click the **Add user** button.

### Step 5: Instructions for the user

The added user will automatically receive an email with instructions on how to finalize their account creation - set the password.

Immediately afterward they can start using the system.

If your co-workers have questions regarding finalizing their accounts, feel free to point them to these instructions.

### Step 6: Activate their blockchain key

Once your co-workers set their password and log into the CargoX Platform for the first time, they will be prompted to add a blockchain key to their accounts.

Before their blockchain key is allowed to sign blockchain actions on behalf of your company, it needs to be approved.

Once new users set up their blockchain key, the administrator of the company (and any user from your company with an active blockchain key and permissions to perform this action) will receive an email notification.

To approve user's newly added blockchain key, log into the CargoX Platform, open **Users** section (sidebar), click on that particular user, and once viewing their account, go to the second tab titled **Privacy & Security** and activate their blockchain key by pressing the green **Approve** button (and then sign this action with your blockchain key).

Once their blockchain key is activated (or deactivated), users will receive an automated email notification.

## Note

Only users with active blockchain key and permission to manage users can perform this action.

The screenshot displays the CargoX platform's user management interface. On the left, a sidebar contains navigation links: Compose, Inbox, Drafts, Sent, Archive, Manage, Rules and Filters, Company details, Users, Contacts, Account, My profile, and Billing. The main area is titled 'Users' and shows a list of users. Two users are listed: John Campbell (happy.sun.logistics@gmail.com) and Second User (example+issuer+happysun+logistics). The 'Second User' is selected, and the 'Personal details' tab is active. The 'Blockchain keys' section shows a table of keys with columns: Public address, Key type, Date added, Status, and a 'Disable' button. The table lists six keys, including Metamask, Private Key, Keystore File, and Ledger Hardware Wallet. The 'Second User' has a 'Pending approval' status for one of the keys, and an 'Approve' button is highlighted with a red box.

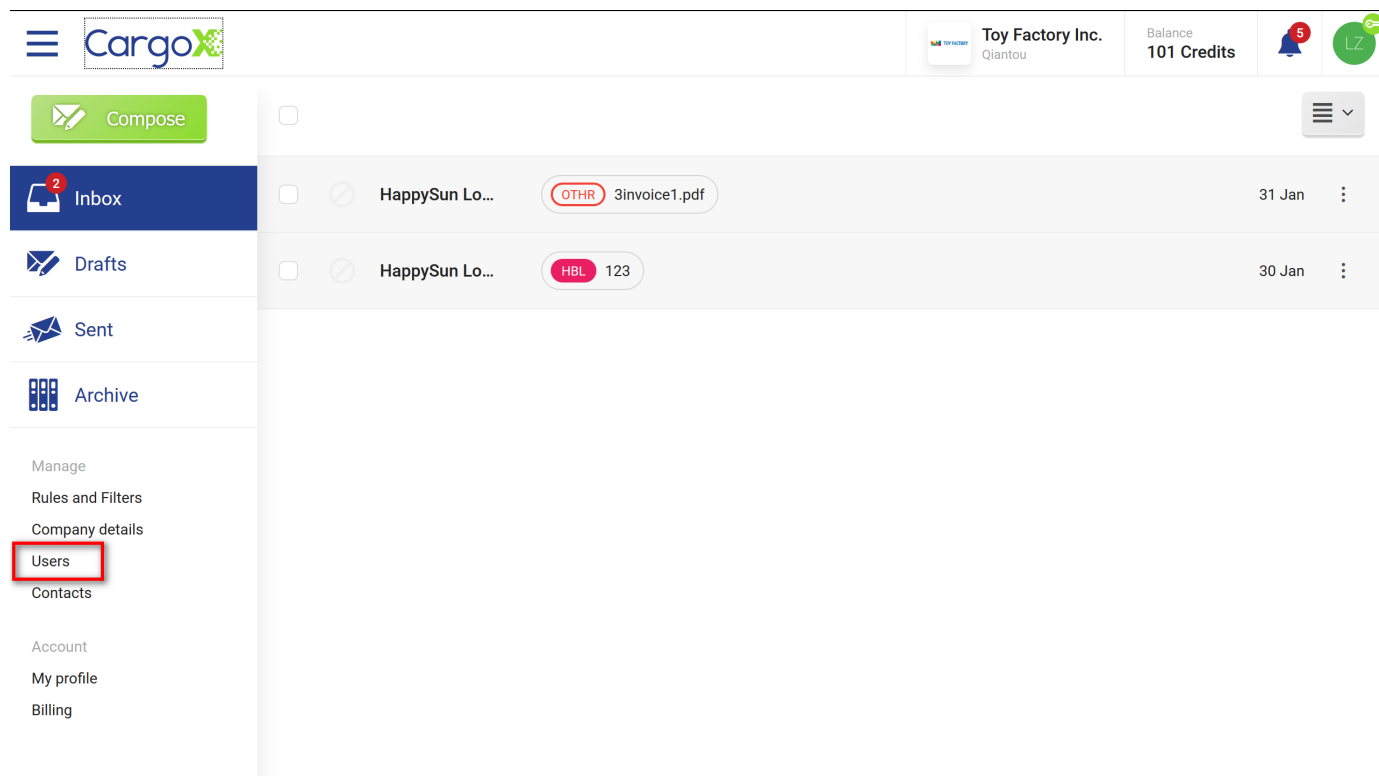
## Managing users

## Note

Only a user with the **"Manage company details" aka "company manager"** permission is able to manage users, change their permissions (access rights), activate or deactivate their blockchain keys, change their passwords and remove existing users.

### Step 1: Enter user management

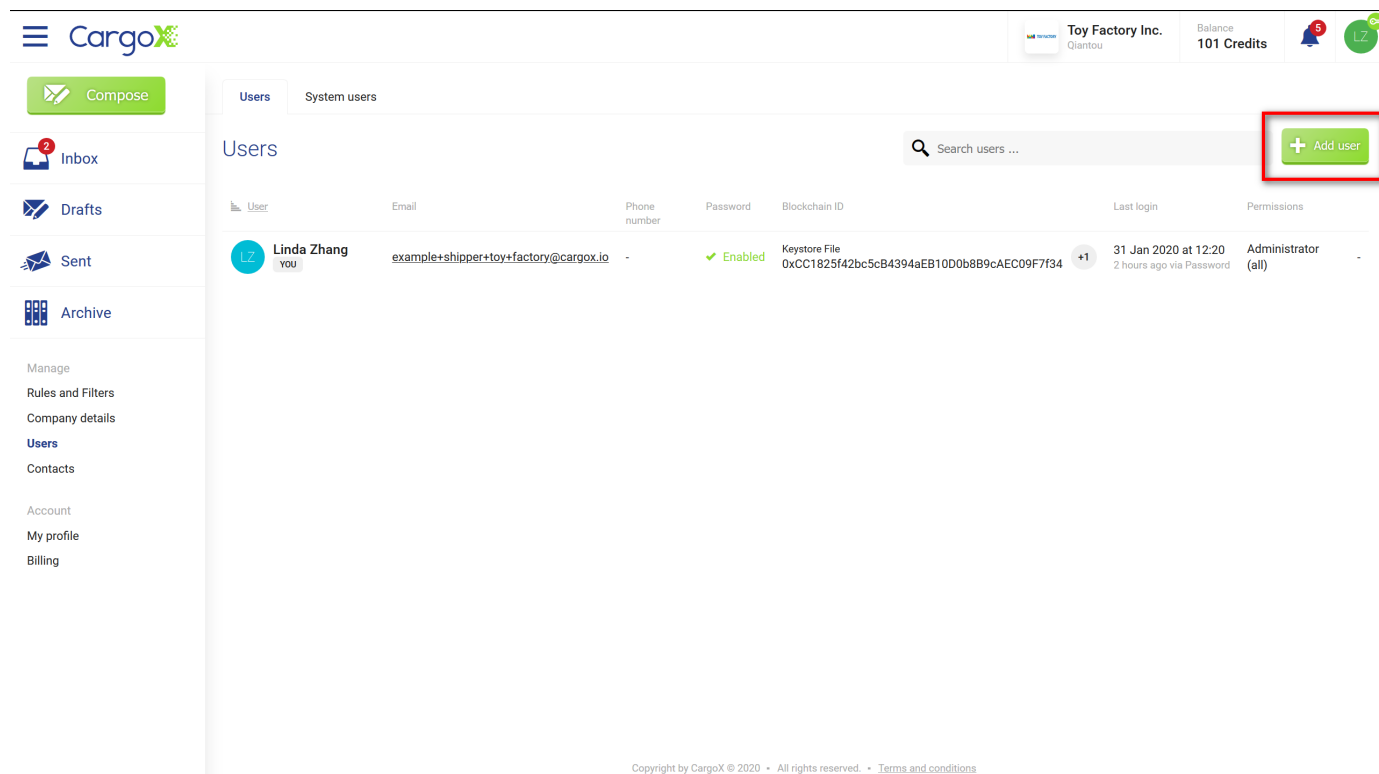
To access user management, go to **Manage | Users**.



## Step 2: User overview

The user management page provides an overview of all existing users, including their email, blockchain key address, last login information, and their permissions.

To view detailed information about the user, click on that user.



## Step 3: Managing existing users (1/2) - Permissions and personal details

Please note that user information is displayed in two tabs - **Personal details** and **Privacy & Security**.

The screenshot shows the CargoX platform interface. On the left is a sidebar with navigation options: Compose, Inbox, Drafts, Sent, Archive, Manage, Rules and Filters, Company details, Users, Contacts, Account, My profile, and Billing. The main area has tabs for Users, System users, Personal details, and Privacy & Security. The 'Personal details' tab is active for user 'John Smith'. Below the user's profile, there is a list of users with columns for User, Email, and a status indicator. At the bottom of the user list, the 'Edit user' button is highlighted with a red box.

To edit an existing user just click the **Edit user** button at the bottom of the screen. **Pop-up windows** similar to the ones when adding users (steps 3 & 4) will appear. You can change the basic information of the user on the first one, and his permissions on the second one.

Click the green **Save changes** button below to complete the process.

#### Step 4: Managing existing users (2/2) - User's password and blockchain key(s)

Click on the second tab (**Privacy & Security**) to manage the user's login options and blockchain key(s).

The screenshot shows the 'Privacy & Security' pop-up window. It has two tabs: 'Personal details' and 'Privacy & Security'. The 'Privacy & Security' tab is active. Under 'Login with password', there is a message stating that email and password can be used for login, but blockchain operations still require a key. A green checkmark indicates that password login is enabled. Below this, the 'Reset' button is highlighted with a red box. Under 'Blockchain keys', there is a table with columns: Public address, Key type, Date added, and Status. The first row shows a private key added on 31 Mar 2020 at 10:48, which is active. The 'Disable' button for this key is highlighted with a red box. Below the table is a 'Login history' section with a search bar and a table with columns: Time, Method, IP Address, Device, and Status. The table is currently empty. At the bottom, there are 'App permissions' for Envelope, Company, and Contacts, each with a list of permissions and their status. The 'Edit user' and 'Delete user' buttons are at the bottom right.

Clicking the **Reset** button will send the user an email. This will allow him to reset the password.

You can also **Disable the password login** for the user to only allow him to log in with a blockchain key - if the user has registered it, and the key is active.

Below these options you can view the public addresses of the **user's blockchain keys**. Here you can **Approve** and activate newly added keys, or **Disable** an active key.

The user will receive an automatic notification email after their key is activated or deactivated.

Click **Close** to finish managing a user.


### About blockchain key types - how to choose the right one?

The CargoX Platform supports all popular blockchain key types. Because of simplicity new users start using the CargoX Platform with the **blockchain key file**. It is an encrypted file + encryption password pair. It offers moderate security.

We strive for the highest level of safety and security for our users. That is why we periodically encourage our users to upgrade their blockchain key to a more secure type. That is when the following screen appears.

You can explore the options, or choose to snooze the warning for now. In this case, you can click the **Remind me in 7 days** button to be reminded again.

Increase your security

 You are currently storing your private key in a format which is susceptible to man-in-the-middle (MITM) attacks and can be easily lost, forgotten, or stolen. If a key is lost, CargoX is not able to recover the key.

We strongly advise you to think about storing the key in a **hardware wallet**.

This platform works with any of the following hardware wallets:

- Trezor Hardware Wallet**  
Small hardware wallet suitable for inexperienced users. [Buy now](#)
- Ledger Hardware Wallet**  
Best selling hardware wallet with a micro form-factor. [Buy now](#)
- BC Vault Hardware Wallet**  
Hardware wallet with a large screen which does not compromise convenience over security. [Buy now](#)

Already purchased? Set up a device by clicking the button below.

Remind me in 7 days

Set up a device

### What is the actual danger?

All blockchain key types are vulnerable to the so-called man-in-the-middle attacks. The only exceptions are hardware wallets and a specialized software wallet called MetaMask

The man-in-the-middle attack is conducted in a way that if you by accident (or as a result of phishing scam - a method to lure you into a fake website), use your blockchain key to login on a website that looks similar or even identical to the CargoX Platform, but in fact, it is not the CargoX Platform, the perpetrators can steal your blockchain key from you.

The perpetrators can then use your blockchain key to login into the real CargoX Platform and access your data, steal your documents by transferring ownership of them to a third party, etc.

### Blockchain key upgrade type options

There are several options on how to store your blockchain key (private key).

This can be done in various forms:

- As a hardware security device, similar to your bank's one-time password generator
- A browser-security component, similar to a digital certificate.
- A password-protected file containing your private key, similar to username/password combination.

Generally, the options for storing the private key can be sorted into two groups:

- **The secure way**, by using a hardware wallet, such as Trezor or Ledger.
- **The less secure way**, by storing the private key of your wallet on your computer storage. That can turn out to be insecure - your key could get lost, stolen, or damaged. To simplify the management of these keys and make it a bit more secure, we suggest using the MetaMask software wallet.

## Important

It is of vital importance that you store your private key securely. Please treat it as a real, physical key. Whoever has access to your private key can essentially do anything on your behalf. CargoX does not have access to your blockchain keys, therefore we can not restore a lost blockchain key.

### Hardware wallets

Hardware wallets are the most secure way of storing your private key. If you use a hardware wallet device your private key never leaves the device. This way you are safe from potential scams and phishing or hacking attempts. A hardware wallet is also the safest way of logging into and using the CargoX Platform.

The CargoX Platform currently supports three hardware wallets :

- Trezor
- Ledger and
- BCVault

### Software wallets

## Warning

**First a word of caution: software-only based blockchain security approaches are inherently insecure.**

Software-only wallets store your private keys on your computer. They can be **stolen, compromised, or lost**. CargoX highly recommends hardware wallets as the default security option. Use the following software wallet methods only if hardware-based wallets are not an option due to various organizational or system constraints. Make sure you always have an offline backup of your software wallet!

The following software wallet methods are supported:

- MetaMask provides the most secure way of logging in, out of all software-based solutions.
- Blockchain key file (Blockchain key text) - login saves your credentials into an encrypted file locally (this is the default for new users).
- The private key and Mnemonic phrase are direct approaches, where you enter your "secret" into the browsers. CargoX does NOT recommend using these two methods!

### Best practices managing your blockchain keys

#### How to best manage blockchain keys (private keys) of your company and your employees?

CargoX recommends the use of hardware wallet devices.

Special care should be taken when creating a backup of these hardware wallets. Follow the instructions of the device manufacturer - these steps usually include writing some words to a piece of paper and storing that in a sealed envelope in a safe place, such as a safe deposit box. This enables you to restore your blockchain key to a replacement hardware wallet in case of malfunction or damage to the device, forgotten pin, or if an employee loses the device.

The company's information security officer should make sure all hardware wallet backups are made and locked away in the company's safe or at a highly secure location.

In a perfect world, every user would use a hardware device, but it is also acceptable to use blockchain keys of other types. That is agreeable especially for users with a limited set of access rights - for example if their tasks are limited only to creating but not sending or managing documents. If such a user would lose or misplace their blockchain key, you can just disable their blockchain key and they can register a new one.

For users with very limited access rights, it might be acceptable to let them use only their username and password to log into the CargoX Platform. They can reset their password if they forget or lose it.

All users can link blockchain key to their accounts later on - when needed. Even users with very limited permissions.

For department heads and other users that will perform irreversible transactions, such as transferring documents, releasing cargo, and accomplishing documents, accepting and activating blockchain keys, CargoX recommends the use of hardware devices as well.

If an employee leaves the company, you can even delete their CargoX account.

Once blockchain key is registered by a user, it needs to be activated by the user from the same company that has permissions to do so (manage users) and an active blockchain key.

### ***Which wallets does CargoX recommend?***

We strongly recommend that you use a hardware wallet device.

**Choose Trezor One if you have Google Chrome or Mozilla Firefox on your Windows or Mac computer.**

**Choose Ledger Nano S if you have the Google Chrome browser on your Mac computer.** It is our experience that the Windows 10 security mechanism made using a Ledger hardware device a nuisance due to constant security notification popups - that is the only reason why we do not recommend using Ledger hardware wallet for Windows users.

Both devices provide ultimate security and should be your preferred choices for using our blockchain solutions.

However, both require the installation of supporting software, which requires administrative rights on your computer.

**If you cannot install the software, please get in touch with your system administrator.**

If you do not want to wait for days to obtain the hardware wallet device, your best way forward is using the MetaMask plugin for your browser - Google Chrome, Mozilla Firefox, and Opera are well supported. The software wallet is also integrated into the Brave browser. Please note that **MetaMask provides more security than other non-hardware options - but hardware wallets are always even more secure.**

### ***How do these wallets actually work?***

You can think of your **blockchain public address** in similar terms as of your public email address.

Although it looks like a bunch of random letters and numbers, it always starts with "0x" (like this one 0xde0B295669a9FD93d5F28D9Ec85E40f4cb697BAe).

This is a public address like your email address is. Anyone who wants to send you an email needs to know your email address. It is similar in the world of blockchain. You need to tell people to which blockchain public address they can send you a document or other blockchain asset.

It is safe to give your public address to anyone, even printing it on your business cards and advertising it on your website. Please note, if you publish your blockchain public address, people will now be able to associate your name or your company name with your blockchain public address.

Now, let's compare the blockchain public address with email even further. To read the received emails, forward them, or print them you need your username and password. And no-one else has this, you keep these two pieces of information secret. In the "world of blockchain," this "secret" is called the **blockchain private key**. Anyone who knows your blockchain private key can access your "blockchain account" and cause you harm by manipulating your assets stored in that account - or stealing them. That is why we cannot emphasize enough - take precautions guarding it as you do with your bank's credentials and email password!

So, you only need to understand two things:

1. Your **blockchain address** (public, you can share it)
2. Your **blockchain key** (private, it's yours only)

The blockchain keys are stored in different ways. The default key storage on the CargoX Platform is the blockchain key file (keystore). But a much better way is to have your key stored in a wallet. A wallet is a hardware device (but it can also be a software application) that stores your private key and allows interactions with the network in a very secure way that prevents anyone stealing the key from it. A wallet can actually store several private keys belonging to you, allowing you to control several public blockchain addresses.

### ***Your personal digital signature (blockchain key)***

To unlock all the functionalities of the CargoX Platform and to perform any blockchain-related actions, for example - sending a document, you need to have your own digital signature (blockchain key).

Blockchain key is your personal digital signature. Take care of it, as without a blockchain key, no one else can send documents in your name – not even CargoX.

Every user of the CargoX Platform needs a blockchain key to digitally sign transactions and send documents in envelopes. Users can register more than one key with their account, and they can use the keys independently of each other.

The blockchain key creation does not cost anything and only takes a minute of your time.

### ***Attention!***

*Quick instructions: Go to My profile | Privacy & Security, click the Add new Blockchain key button. Click Create a new key, and create a password for encrypting it. Then download your blockchain key. Continue with verifying the key by pointing to downloaded file and providing its password. To complete the process complete email verification. Create a copy of the downloaded file and write down your password. You are done.*

*You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).*

### **Note**


You can also start the process of adding a blockchain key manually. Click on your avatar image in the upper right corner, then select **Privacy & Security** (My profile) and finally click the grey **Add new Blockchain key** button.

## Welcome to the CargoX Platform!

CargoX Platform requires that users digitally sign document transfers. Instead of a blue-ink signature and wet stamp of paper era, this happens electronically with a blockchain key.

Blockchain key is your personal digital signature. Without a blockchain key, no one else can send documents in your name – not even CargoX.

In the next step you will create your own digital signature, your own blockchain key.

 Adding a blockchain key is mandatory to use all the features of the CargoX Platform.

Next

If you do not have a blockchain key registered, you will be offered to add your first blockchain key at the end of the company registration process and also at every login. Start the process by clicking the green **Next** button.

### **Step 1: New or existing blockchain key**

You can create your new blockchain key inside the web browser (it only takes a few seconds and it is free of charge), or you can use your existing blockchain key if you already have one.

Once you read the page **confirm that you understand** that CargoX can not restore your blockchain key for you (by clicking into the checkbox - red circle in photo below).


To create a new blockchain key, click the green **Create a new key** button. Skip to the next step!

To use your existing blockchain key, click the grey **Add an existing key button**, and follow the on-screen instructions. You can consult blockchain key guide for details about various types of blockchain keys supported). If you are adding a keystore file (labeled as *blockchain key file* on the platform) type of blockchain key, skip to Step 4. If you are adding other blockchain key types, follow the on-screen instructions, and refer to your key specific guides available here: Ledger, Trezor, MetaMask).



## Blockchain key = Your personal digital signature

You can **create a new blockchain key** (most new users) or **link an existing blockchain key** (only if you already have one, or if you use a hardware wallet device).

 **CargoX is decentralized and cannot restore a lost blockchain key.** This is different from what you are used to.

**Make sure you have a secure backup copy of your blockchain key.**



Understand that CargoX does not have access and cannot restore my blockchain keys and passwords, therefore it is my responsibility to keep them safe.



### Beyond CargoX

Similar to most certificates your blockchain key is also universal. Besides CargoX, you can use it to access a growing list of applications and services on the open/public blockchains.

Add an existing key

Create a new key

### Step 2: Set the password for your new blockchain key

Like your signature, your blockchain key is yours and yours alone. For an additional layer of protection, your blockchain key will be encrypted. Choose the encryption password for your blockchain key.

The color bar in the middle will show the strength of your password. You can proceed once it is safe (green). This should not be the same password as your login password.

Make sure you can not forget or lose your password (we advise to use a password manager, but you can also write down the password on paper and store it in a safe). Click the green **Next** button to continue.



### Protect your blockchain key



Like your signature, your blockchain key is yours and yours alone. For an additional layer of protection, your blockchain key will be encrypted. Choose the encryption password for your blockchain key.

\* Encryption password

.....

Password strength



\* Repeat encryption password

.....



### Make it secure

- Make it unique. Don't use your login password.
- Don't use common words and avoid personal information.
- Use a [password manager](#).

[Read more tips](#)

Back

Next

### Step 3: Download your newly created blockchain key file (blockchain key file)

The blockchain key is generated in your web browser locally which means that nobody - not even CargoX - ever sees your key or your key password.

This is the only time the blockchain key will be displayed to you, therefore, first, click the green **Download** button to permanently save your blockchain key file on your computer.

Once you download the blockchain key, do not run it. There is no need to install or run any additional program to use CargoX.

Move the downloaded file from your download folder to a highly secure place where you will find it even a year from now. We recommend that you immediately create a second copy of your blockchain key file and copy it on a USB drive. Maybe even create a third copy somewhere else before clicking Next.

### Warning

If you lose your blockchain key file or forget the password you encrypted it with, CargoX will be unable to restore the key for you.

Once you downloaded the blockchain key file successfully and stored it in a safe location **confirm that** by clicking into the checkbox (red circle in the photo below) and click **Next**.

### Note

Some companies have very restrictive IT security policies that essentially prohibit users to download anything from the internet. If you are unable to download the blockchain key file to your computer, click the **I am unable to download files** button for an alternative method. Skip to step 5.



## Store and backup your blockchain key

✓ Your blockchain key has been successfully generated in your web browser.

To permanently store it on your computer, click the green **Download** button. Once you download the blockchain key, do not run it. There is no need to install or run any additional program to use CargoX.



[I am unable to download files](#)

#### ⚠ Create a second copy of your blockchain key

This is the only time the blockchain key will be displayed to you. After you have downloaded the blockchain key file, create a copy of the file to a USB flash drive before clicking Next.



I confirm I have saved the blockchain key and understand CargoX cannot recover it



### Your blockchain key is important!

You will need your blockchain key and its encryption password every time you will want to use the CargoX Platform.

Never share your blockchain key and encryption password with anyone.

Back

Next

## Step 4: Link your blockchain key to your account (blockchain key file)

You have now successfully created and downloaded your blockchain key file, and the only thing left to do is to associate it with your CargoX account.

Click the **Choose file** button and select your downloaded blockchain key file from your computer. Provide the encryption password for your blockchain key file in the field below.

This will unlock your blockchain key in your browser. Please note that your blockchain key file and your encryption password never leave your computer - they are processed in your browser. Click **Verify and Add** to continue and skip to step 7.



## Verify the blockchain key

To connect the new blockchain key with your account, you need to verify it first.

Click the grey Choose file button and select the downloaded blockchain key file from your computer. Then provide the encryption password for your blockchain key in the field below. Finally click the green Verify and Add button.

Choose file

CargoX - Blockchain key - David Anderson - 0xe094e0E45e0E90868Ab65E89...

\* Encryption password

●●●●●●●●●●

Encryption password for your blockchain key.



Verification makes sure you have stored your file securely and you know its password.

If you can't verify your blockchain key, click Back and try again.

[Back](#)[Verify and Add](#)

### Step 5: Copy your newly created blockchain key text

An alternative way to save your blockchain key is to copy the content of the encrypted blockchain key file (which is essentially just a text file).

Click the green **Copy to clipboard** button to copy your blockchain key text to the clipboard. Then paste the copied text into a text document on your computer. Store that document in a safe place where you will expect to find it even a year from now. We recommend that you immediately create a highly secure backup copy.

### Warning

**If you lose your blockchain key text or forget the password you encrypted it with, CargoX will be unable to restore the key for you.**

Check the box below to **confirm** that you have copied the key successfully and saved that document to a safe location. Click **Next** to continue.

## Store and backup your blockchain key

✓ Your blockchain key has been successfully generated in your web browser.

To permanently store it on your computer, click the green Copy to clipboard button. Paste it to a text editor such as Notepad/Word or similar program and save it.

Blockchain key text

```
N4lgbgpgTgzglgewHYgFwGYA0I4BM0gBGajACyECcFATAGwC06upA7PeQAwCG9NAZg1y5i1dB
BZcArF1EhsXIVAgwYBAMZkWHahwpk+FXBXRq+hDixYAOSRQsRSFWnw5Wikjh1pdCckGqgATw
AHABcENFA1OGCAC2hQiAAPUIJaFh1caittNUI1bLpcSQhiDlxaSXJ0KWIIxBZcPmJ0dEMuNS5jNo
g1FkliEgp6lmc7UnQ/aLjoYK4oLgBbVVRQODACZtw1CHRIWgLiWizaabqUkk+H3QzK7VaEABfbGn
4qAluZXoRK3o1UifbAAayaBBgARCqRBTmC2WkRAuGBABsICgMNRsDAuCjUqgkeZHNRJNJSF
xWq1qBA6M0yKwpNQJB09sQ1KRaiQMsrCBAfHzvKQ1NsrDRaMY9Jy
/BirMQaNgPqgrNhgmiC8QIsOgQKByuLQ+RUdFdSLgFLR9Lc3FZReT0FYJI0rHtTIRJMU1Nw+KQ
RFphtQtLQRNROs8nkA=
```

Copy to clipboard

[I want to download file](#)

### ! Create a second copy of your blockchain key

This is the only time the blockchain key will be displayed to you. After you have saved your blockchain key text to a file, create a copy of that file to a USB flash drive before clicking Next.

☐ I confirm that I have saved my blockchain key and its encryption password to a safe place. I understand that CargoX can not recover it.

Back

Next

## Step 6: Link your blockchain key to your account (blockchain key text)

You have now created a new blockchain key for yourself and stored blockchain key text on your computer. Now is the time to link the blockchain key to your CargoX account.

Pasting your blockchain key text from the document where you saved it, and providing the password to decrypt it, will unlock your blockchain key in your browser. Please note that your blockchain key and your password never leave your computer - they are processed in your browser only.

Click **Verify and Add** to continue.

## Verify the blockchain key

To connect the new blockchain key with your account, you need to verify it first.

Paste your blockchain key text and enter its encryption password.

```
N4lgbgpgTgzglgewHYgFwGYA0I4BM0gBGajACyECcFATAGwC06upA7PeQAwCG9NAZg1y
5i1dBBZcArF1EhsXIVAgwYBAMZkWHahwpk+FXBXRq+hDixYAOSRQsRSFWnw5Wikjh1pd
CckGqgATwAHABcENFA1OGCAC2hQiAAPUIJaFh1caittNUI1bLpcSQhiDlxaSXJ0KWIIxBZc
PmJ0dEMuNS5jNog1FkliEgp6lmc7UnQ/aLjoYK4oLgBbVVRQODACZtw1CHRIWgLiWizaab
qUkk+H3QzK7VaEABfbGn4qAluZXoRK3o1UifbAAayaBBgARCqRBTmC2WkRAuGBABsIC
gMNRsDAuCjUqgkeZHNRJNJSFwq1qBA6M0yKwpNQJB09sQ1KRaiQMsrCBAfHzvKQ1N
srDRaMY9Jy
/BirMQaNgPqgrNhgmiC8QIsOgQKByuLQ+RUdFdSLgFLR9Lc3FZReT0FYJI0rHtTIRJMU1N
w+KQRFphtQtLQRNROs8nkA=
```

\* Encryption password

●●●●●●●●●●

Encryption password for your blockchain key.



### Your blockchain key is important!

You will need your blockchain key and its encryption password every time you will want to use the CargoX Platform.

Never share your blockchain key and encryption password with anyone.



Verification makes sure you have stored your file securely and you know its password.

If you can't verify your blockchain key, click Back and try again.

Back

Verify and Add

**Step 7: Email verification**

As an extra security measure, before allowing you to link a new blockchain key to your account, CargoX sends a code to your email. Please check your email and type the received verification code into the box. Click **Submit** to continue.



## Verifying and adding your blockchain key



Verifying



Awaiting confirmation



Adding

A verification code has been sent to your email address.

\* Confirmation code

092164

Enter 6-digit confirmation code that we have sent to your email address.

Didn't receive a code? [Re-send verification code](#)

Close

Submit

**Step 8: Blockchain key added and activated**

Your blockchain key is now linked with your CargoX account.

If you do not see a screen like the one below - especially the part where it says: **The key has been activated and is ready to use** - skip to Step 9.



## Verifying and adding your blockchain key



Verifying



Awaiting confirmation



Adding

You have added your blockchain Key.  
The key has been activated and is ready to use.

Close

In this case you are the first user from your company to add a blockchain key. Only the first blockchain key is activated automatically by the CargoX Platform.

As a security mechanism, all your additional blockchain keys, or blockchain keys of other users in your company, must be activated after they have been added.

To activate another blockchain key follow instructions on how to activate or deactivate blockchain keys.

You will also be required to manually approve blockchain keys of other users within your company. You can also authorize your colleagues to do this. You can set these permissions at the time when you create their accounts or edit their accounts permission later (permission's name: company manager).

Once a new blockchain key is added within your company, the system will notify all users with permission to review it (they will receive an email notification once such action is needed).

**Skip to step 10.**

**Step 9: Blockchain key added, activation pending**

Your blockchain key is now linked with your CargoX account.

Before you can use it, it must be however approved by your CargoX administrator.

You will receive an email notification once this is done.



## Verifying and adding your blockchain key



Verifying



Awaiting confirmation



Adding

**Your blockchain key has been added successfully.**

You are done! To use the blockchain key, your company's administrator needs to approve it.

You will receive an email once your blockchain key has been activated.

Close

### Step 10: Congratulations, you are done!

Your registration is complete.

The suggested next steps:

- Verify information about your company or request information change. (Manage | My company | Company details)
- (OPTIONAL) If you are an EU company with VAT number verify your VAT number against VIES to qualify for invoices without the VAT applied. (Manage | My company | TAX settings)
- Verify or change your personal details like phone... You can also add your photo (Account | My profile)
- Create additional user accounts for your co-workers (Manage | Users)
- Purchase CargoX units to start the company verification process step 2 (manage | My company | Verification)
- Create additional user accounts for your co-workers (Manage | Users)
- Build your ecosystem and connect with other companies on the CargoX Platform (Manage | Contacts)

The complete CargoX Platform users manual is available for your convenience. We suggest that you start by familiarizing yourself with the CargoX Platform's workspace first.

If you have any questions, contact us at [support@cargox.io](mailto:support@cargox.io).

### Approving and disabling blockchain keys

During the registration of a new company, their first blockchain key will be automatically activated by the CargoX Platform.

All additional blockchain keys, such as additional blockchain keys for the first user, or the blockchain keys of additional company users, shall be manually approved by the existing user with an active blockchain key. Only then can these blockchain keys be used to sign transactions on behalf of the company, according to their default or individual permissions.

## Note

By assigning the manage company details permission to users, they can also manage (approve or disable) blockchain keys and accounts of other users in the company.

Every time a new blockchain key is linked to an account belonging to your company, all users with proper permissions will receive a notification (on the platform and in email), reminding them that they can review and approve the newly added blockchain key.

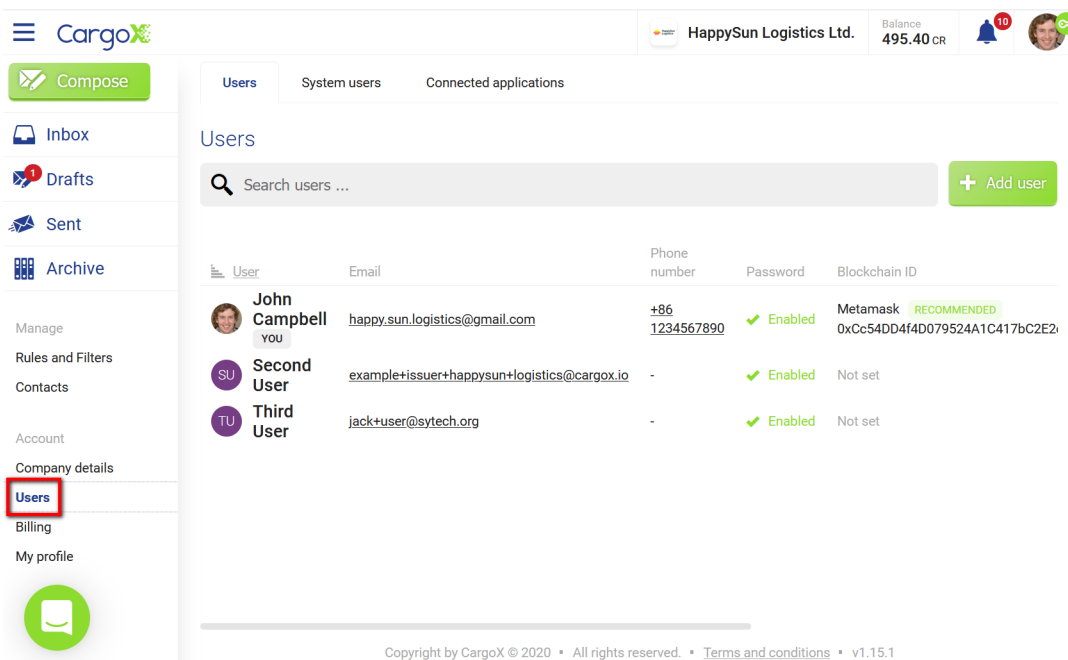
### Step 1: Log into your CargoX Platform account and unlock your blockchain key

Login in to your CargoX Platform account using your blockchain key. If you logged in using your username and password, first unlock your blockchain key.

### Step 2: Enter user management

In the left sidebar choose **Users** - the option is nested under Account.

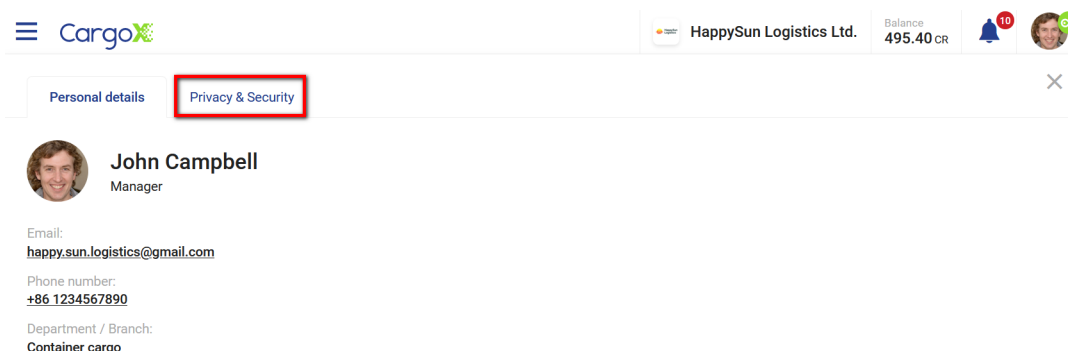
All user accounts belonging to your company will be listed in the main section of the screen. Click on the user whose blockchain key you wish to manage.



The screenshot shows the CargoX Platform interface. In the left sidebar, the 'Users' option under the 'Account' section is highlighted with a red box. The main area displays a table of users with columns for User, Email, Phone number, Password, and Blockchain ID. Three users are listed: John Campbell, Second User, and Third User. The 'Second User' is highlighted with a red box.

User	Email	Phone number	Password	Blockchain ID
John Campbell YOU	happy.sun.logistics@gmail.com	+86 1234567890	✓ Enabled	Metamask RECOMMENDED 0xCc54DD4f4D079524A1C417bC2E2
Second User SU	example+issuer+happysun+logistics@cargox.io	-	✓ Enabled	Not set
Third User TU	jack+user@sytech.org	-	✓ Enabled	Not set

Continue by clicking the **Privacy & Security** tab.



The screenshot shows the CargoX Platform interface. In the top navigation bar, the 'Privacy & Security' tab is highlighted with a red box. The page shows the user's profile information, including name, email, phone number, and department.

**John Campbell**  
Manager

Email:  
happy.sun.logistics@gmail.com

Phone number:  
+86 1234567890

Department / Branch:  
Container cargo

### Step 3: User's blockchain keys

The screen lists all blockchain keys linked to this user's account, and their public blockchain key address, key type, and date added.

Locate the key you wish to approve and click the green **Approve** button next to it.

You can disable a specific blockchain key by clicking **Disable**. The key will remain listed - if you wish, you can approve it again.

Public address	Key type	Date added	Status
0xCc54DD4fD079524A1C417bC2E2c2530179c6337	Metamask	6 Apr 2020 at 12:06 5 months ago	Pending approval
0xc1B8C5fFe3e21060d6Bd23e331043d8F02a560dA	Private Key	5 Apr 2020 at 06:56 5 months ago	Active CURRENTLY UNLOCKED
0x061aF1dfC76F0fd140215fbccd8Dab88407Fb67E	Keystore File	12 Apr 2020 at 15:14 5 months ago	Pending approval
0x1c4FE6B7F0956d6d51A29C057738823DD1Cbb242	Metamask	6 Apr 2020 at 23:40 5 months ago	Active
0x3e08c9a41e4C6e5e77056A91d5F5805E3Da09ea0	Keystore File	4 Jun 2020 at 21:21 3 months ago	Pending approval
0x66750E050dBB8c597972e27F8b7A3B6C45b99C4c	Ledger Hardware Wallet	6 Apr 2020 at 00:07 5 months ago	Pending approval
0x4350ccf199c336d46701E099AF55d4f923565082	Trezor Hardware Wallet	6 Apr 2020 at 01:53 5 months ago	Pending approval
0x94ffEB1b2277645f1022Dcd3B3819F974a3e96E	Keystore File	30 Aug 2020 at 23:59 16 minutes ago	Pending approval

#### Step 4: Sign with your blockchain key

The information to allow a new blockchain key to represent your company is stored on the blockchain, which means that this key's approval is a blockchain transaction.

As with all blockchain transactions, to initiate it, you need to digitally sign this action with your active blockchain key.

Double-check that the blockchain key listed below is the key you wish to approve for the user, then click **Next**.

**Approve blockchain key**

Review Choose blockchain key Sign and Approve

**Approval of the blockchain key**

To approve and activate the following blockchain key, click Next to continue.

**Keystore File**  
Public address: 0x94ffEB1b2277645f1022Dcd3B3819F974a3e96E  
Added on: 30 Aug 2020 at 23:59

Close Next

On the next screen **Sign and approve** the blockchain transaction.

**Approve blockchain key**

Review Choose blockchain key Sign and Approve

**Sign and Approve blockchain key**

Your blockchain key is unlocked and it will be used to sign this action.

Click the Sign and Approve button to activate the new blockchain key.

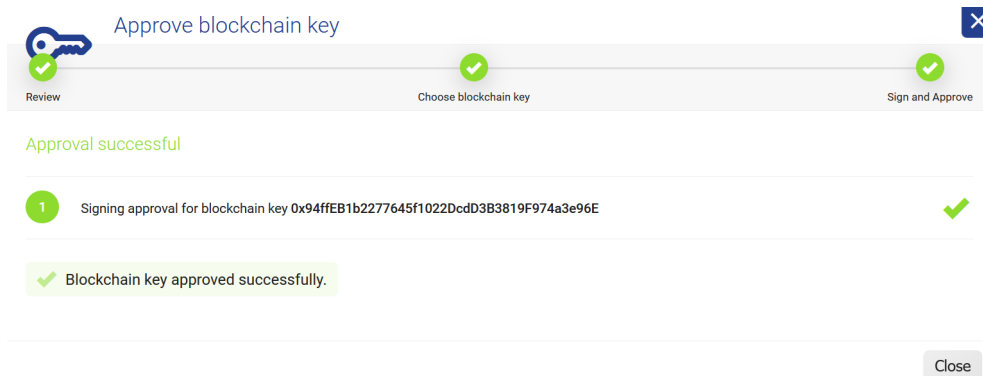
Back Close Sign and Approve

#### Note

If you have two or more blockchain keys linked to your CargoX Platform account, you will first need to select which of your keys you want to use to sign this approval.

### Step 5: Key is approved

After a few seconds you should see a confirmation window, informing you that the blockchain key was successfully approved:



Click **Close** to return to the list of all user's blockchain keys. If you are fast enough, you will see the orange TRANSACTION PENDING next to the chosen blockchain key, and a short time later the status will update to **Active**.

The owner of this blockchain key will receive an automatic email notification informing them that their blockchain key has been approved and is ready to be used.

#### Note

Users are not limited in the number of blockchain keys they can link to their account. Each key needs to be approved independently. This is valid for your own second blockchain key, or for your co-worker's first one.

#### Note

Similar to how blockchain keys can be approved, they can also be Disabled - just use the **Disable** button that you can find next to all active blockchain keys, and digitally sign that transaction.

### Unlocking your blockchain key

To transfer the smart envelope and documents, release the cargo, or manage other blockchain keys (these are all blockchain actions), you need to first unlock your blockchain key. Once your blockchain key is unlocked you can use it to digitally sign and initiate the blockchain action.

#### PREREQUISITES:

- You must have an active blockchain key linked to your account
- Your account must have proper permissions to be allowed to transfer envelopes and manage documents: "Transfer documents and create envelopes" AKA "document manager"

You can check both in the Privacy and Security section of My profile.

#### Note

Your blockchain key will be automatically unlocked if you log into your CargoX Platform account using your blockchain key instead of username and password (see Option 2).

## Attention!

Quick instructions: Click on your personalized icon with red key and click the **Unlock your blockchain key** button. Provide your blockchain key by pointing to downloaded file and provide its password. Key icon will turn green. You are done.

You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).

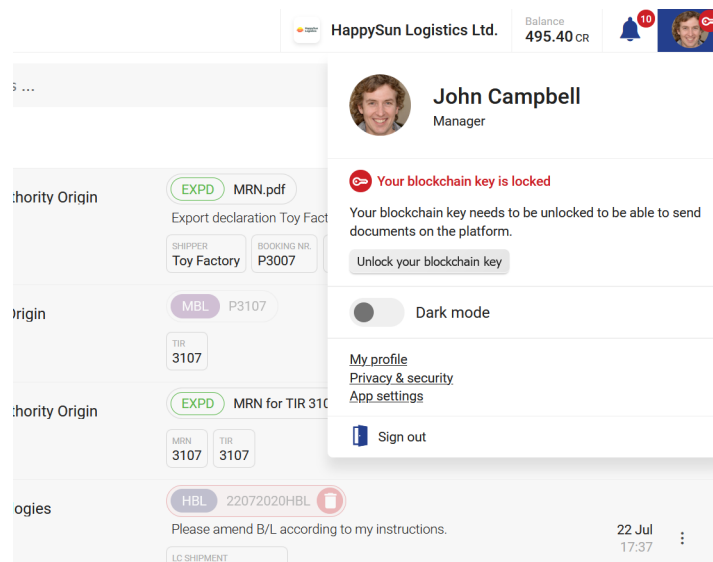
### Step 1: Check the status of your blockchain key

In the upper right corner of the screen (your avatar, represented by your photo) you will immediately see whether your blockchain key is unlocked and ready to sign blockchain actions (green key icon) or still locked (red key icon).



A green icon means your blockchain key is unlocked and ready to digitally sign the action you are about to perform.

If the key icon is red, click on your avatar image so that the pop-up opens, then click on the **Unlock your blockchain key** button.



### Step 2: Unlock your blockchain key

The public address of the blockchain key linked to your account will be displayed along with the key type information and the date when it was linked to your account.

Below you will see instructions on how to unlock your blockchain key. These will depend on the type of your blockchain key.



## Unlock blockchain key



## Unlock your blockchain key

Blockchain key **CURRENTLY LOCKED**

Public address: 0xe094e0E45e0E90868Ab65E89fb118fF82535948c  
Added on: 17 Apr 2021 at 12:36

With blockchain key file

With blockchain key text

Provide your blockchain key file and enter its encryption password.

Choose file

CargoX - Blockchain key - John Campbell - 0xe094e0E45e0E90868Ab65E89fb118fF82535948c - Copy.json

\* Encryption password

●●●●●●●●●●

Encryption password for your blockchain key.

Close

Unlock blockchain key

To continue, click the grey **Choose file** button and select the downloaded blockchain key file from your computer. Then provide the encryption password for your blockchain key in the field below.

**Note**

If you were unable to download the blockchain key file, choose the second tab titled **With blockchain key text**, and paste your blockchain key text into the upper **Your blockchain key text** field, and the encryption password for your blockchain key in the field below.



## Unlock blockchain key



## Unlock your blockchain key

Blockchain key **CURRENTLY LOCKED**

Public address: 0xe094e0E45e0E90868Ab65E89fb118fF82535948c  
Added on: 17 Apr 2021 at 12:36

With blockchain key file

With blockchain key text

Paste your blockchain key text and enter its encryption password.

\* Your blockchain key text ...

\* Encryption password

Encryption password for your blockchain key.

Close

Unlock blockchain key

Click the green **Unlock blockchain key** button to unlock your blockchain key. The key is now unlocked in your web browser.

## Note

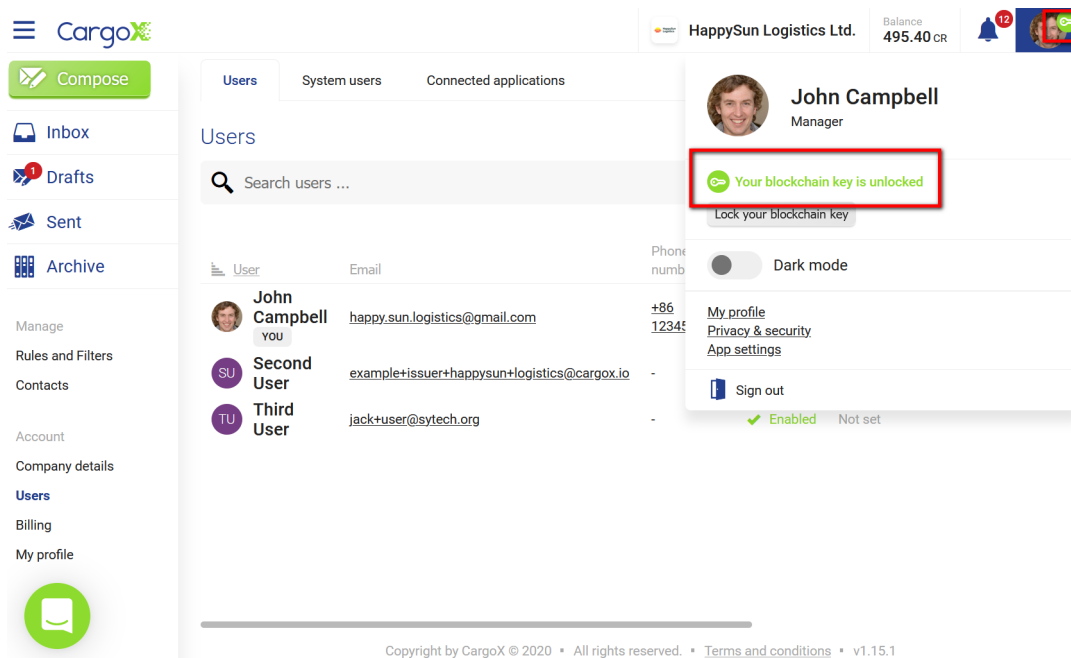
If you have two or more blockchain keys linked to your CargoX Platform account, then you first have to choose which key you wish to unlock. Choose the key you wish to unlock and click **Next**.

## Note

If you are using a different blockchain key type, follow specific on-screen instructions, and refer to Ledger, Trezor and MetaMask instructions.

### Step 3: Re-check the status of your blockchain key

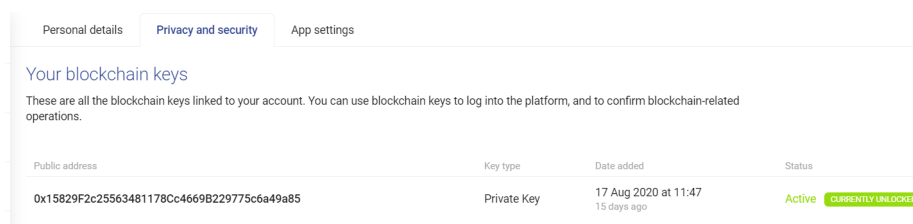
After a few seconds, the window should disappear, and the status of your blockchain key should change to **unlocked**, also indicated with the green key icon in the upper right corner.



Congratulations, you have unlocked your blockchain key! You are now ready to digitally sign a blockchain-based transaction on the CargoX Platform.

## Note

Alternatively, you can check whether your key is locked or unlocked in the **Privacy and Security** section of **My profile**.



## *Trezor hardware wallet*

### *About Trezor One*

The Trezor One and other Trezor hardware wallets are very secure blockchain storage and transaction signing devices. The private keys are generated by the device itself and they never leave the device. This makes them very safe as it is virtually impossible to steal or abuse blockchain private keys from them. To use the CargoX Platform securely, the basic and most affordable model Trezor One satisfies the requirements. CargoX is compatible with all different Trezor devices.

### **Note**

As of the time of this writing, the Trezor devices are compatible with Google Chrome and Mozilla Firefox browsers only.

### *Where to buy?*

The Trezor hardware wallet can be purchased from the manufacturer's online shop at <https://shop.trezor.io/> but also from many [resellers](#) worldwide. We recommend checking your local electronics and computer stores, or your favorite online retailers, as they frequently also have the device in stock.

Please, make sure the device is delivered in the originally sealed packaging - if the package is open or visibly damaged, reject it, as it might have been tampered with.

### *Setting up Trezor One for the first time*

Before you can use the Trezor device you need to initialize it. This only needs to be done once. Because Trezor's software is evolving and it is being updated monthly, follow [Trezor's official instructions](#) - they are guaranteed to be always up to date and valid.

Here is a rough outline of this simple procedure:

1. Do not plug the Trezor device into your computer yet. First you will install the latest version of the [Trezor Bridge app](#), which is required for the device to work properly on your machine. You can verify and debug if you already have the latest version of Trezor Bridge by opening [this](#). Note that administrator access is required to install the bridge app. **If you cannot install the software, please get in touch with your system administrator.**
2. When the app is successfully installed, run it. The application has no active graphical interface or window, it will just run in the background.
3. Open your Chrome or Firefox browser and go to <https://wallet.trezor.io/#/>
4. Connect the Trezor device to your computer via the USB cable as instructed.
5. Click **Create new (wallet)** to set up Trezor for the first time, and if necessary confirm on the device.
6. If you see a notification at the top of the screen that new firmware is available for your Trezor device, we recommend you follow through with the update process before continuing. Just follow the onscreen update instructions.
7. Follow the wizard and follow all the instructions. Among other things be sure to:
  - a. Create a hard-copy backup of your Trezor seed words (write down the 12 or 24 seed words on the paper card).
  - b. Store this paper card in a safe place (like a safe deposit box or corporate secure space). Anyone who can view these words can compromise your private key (and potentially abuse your credentials), so handle this card with extreme care as per your company's security policy. This card enables you to restore your blockchain private key in case you forget a PIN or lose your Trezor device. **Do not skip this step!**
  - c. Set up a security PIN for your Trezor.
  - d. We recommended you name your device, especially if there are several Trezor devices being used in your business environment. Any others steps are optional.

## 8. You can now close the Trezor wallet website.

After completing all the steps described above and in detail on Trezor's webpage or user's manual, you should have a properly configured Trezor hardware wallet, protected by a PIN code and also a backup 12- or 24-words written on the paper and stored in a safe place. Once all of the above is done, you are ready to proceed with the registration of your CargoX account.

### Warning

THE MOST IMPORTANT STEP WITH INITIALIZATION OF TREZOR IS CREATING A BACKUP! IF YOU SKIPPED THIS STEP, DO IT NOW.

### Using Trezor One with the CargoX Platform

After you have configured your Trezor it is time to link it with your CargoX Platform account. If you have not completed your account registration, do so by visiting <https://cargox.digital>.

### Note

If you have a problem logging in with Trezor, please make sure your device is updated to the latest firmware.

## Step 1: Plug in your Trezor

Make sure your Trezor is connected via USB and recognized by your computer (if it is not - have you installed the Trezor Bridge software?).

## Step 2: Select "Trezor Hardware Wallet"

**Step 2.1: To link your Trezor with your CargoX account**, login to your CargoX account with your username and password, or with your currently linked blockchain key, then go to **Account | My profile | Privacy & Security**, and click **Add new blockchain key**. Select **Add an existing key** then select **Trezor Hardware Wallet** from the list and click **Next**.

Choose an existing blockchain key

If you already have a blockchain key, you can link it to your CargoX account. CargoX recommends using a hardware wallet, as it provides the best way of keeping your key secure.

- ☒ **Trezor Hardware Wallet**  
RECOMMENDED Small hardware wallet suitable for inexperienced users. If you don't have one yet, [visit their app](#) to purchase.
- ☐ **Ledger Hardware Wallet**  
RECOMMENDED Best selling hardware wallet with a micro form-factor. If you don't have one yet, [visit their app](#) to purchase.
- ☐ **BC Vault Hardware Wallet**  
RECOMMENDED Hardware wallet with a large screen which does not compromise convenience over security. If you don't have one yet, [visit their app](#) to purchase.
- ☐ **Metamask**  
RECOMMENDED Browser extension which can save blockchain keys in the browser, or act as a proxy to hardware devices.
- ☐ **Keystore File**  
Login with the private key stored on your computer.
- ☐ **Mnemonic Phrase**  
Login via entering your mnemonic phrase.
- ☐ **Private Key**  
Login by entering your private key.

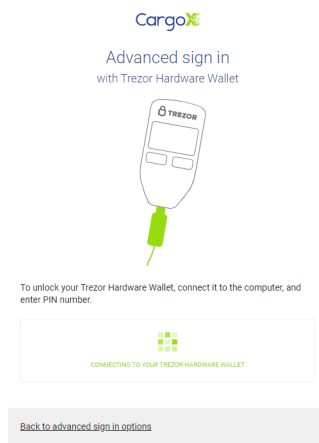
[Need help?](#)  
Follow step-by-step guide where we explain which is the best and most secure blockchain access type and how to set it up.

[Back](#) [Next](#)

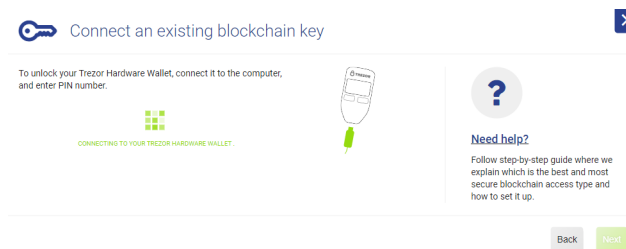
**Step 2.2: To login in the CargoX Platform with your Trezor**, go to the CargoX Platform login page, select **I want to login with my blockchain key**, then select **More options** and finally select **Trezor Hardware Wallet** from the list and click **Next**.

**Step 2.3: To unlock your Trezor for signing the blockchain transaction**, just follow instructions for login with your Trezor from step 3 onwards (you can find it below).

The CargoX advanced login window will open, and instructions will be displayed.

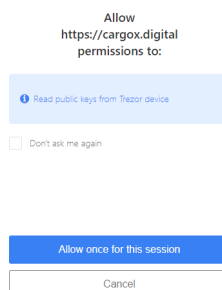


When linking Trezor with your CargoX account, or unlocking it for signing a blockchain transaction, a different but similar screen will appear:

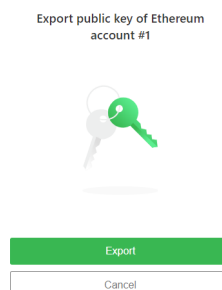


### Step 3: Authorize the Trezor connection.

A new tab (or browser window) will open, showing you the Trezor prompts as seen below. Click the blue **Allow** button. We recommend that before confirming, you select the **Don't ask me again** checkbox to skip this prompt in the future.



A second tab (or browser window) will open, showing you the second Trezor prompt. Click the green **Export** button.



### Step 4: Enter your PIN.

Finally, unlock Trezor by providing the configured security PIN.

There are no visible numbers on the number pad. To increase security and prevent replay attacks (where someone looking over your shoulder or recording your clicks might repeat your password), the numbers are scrambled every time you visit this page.

If your Trezor PIN would be 1234, and Trezor would display numbers as in the second photo, then you would click in the following order:

Enter PIN for Trezor Logistics  
The PIN layout is displayed on your Trezor

.	.	3
2	.	.
.	4	1

Confirm

The actual numbers are shown on your Trezor display, as shown below:



### Step 5: Select Ethereum address


The Trezor hardware wallet supports multiple Ethereum addresses on one device. On the next screen, you will be presented with a list of addresses configured on your Trezor wallet.

#### Note

It is important that you choose one address and always use this address to log into the application.


**When linking** your Trezor to your CargoX account, select the address and click **Next**. On the next screen confirm your email by typing in the verification number sent to your email.

This is it, you are done.

 Connect an existing blockchain key ✕

Select a public address:

- ☒ 0x4350ccf199c336d46701e099af55d4f923565082
- ☐ 0x8f3d0c24959be125ce910f1dbfc94f2b29f63310
- ☐ 0xbbabbc9d3b25e9e1a5c465bc23af5a9662a6d18d
- ☐ 0xcfc63226491d8f058a0a5aff955c74d037c18bc7
- ☐ 0x445497d5f8a90c4a21bce878d500ec3ff43c1e41

 **Need help?**  
Follow step-by-step guide where we explain which is the best and most secure blockchain access type and how to set it up.

Back Next

## Note

When logging in with your Trezor, on unlocking, or confirming a transaction, you will see a slightly different window - but it will display the same 5 addresses as on the login. Choose your address and click **Next**.



CargoX

Advanced sign in  
with Trezor Hardware Wallet

Select a public address:

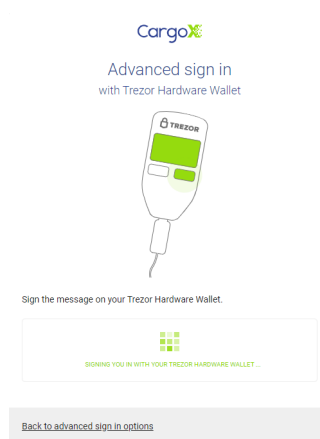
- ☒ 0x4350c199c336d46701e099af55d4f923565082
- ☐ 0x8f3d0c24959be125ce910f1dbfc942b29f63310
- ☐ 0xbabbcc9d3b25e9e1a5c4650c23af5a9662a0d18d
- ☐ 0xcfc63226d91dbf05890a5dff95d74d037c18bc7
- ☐ 0x445497d5fa8a0c4a21bce87ad560ec5ff43c1e41

Login

[Back to advanced sign in options](#)

### Step 6: Sign the message on your Trezor

To complete the log in, unlock, or to sign the transfer, you must sign a message. CargoX will show you this window:



CargoX

Advanced sign in  
with Trezor Hardware Wallet

Sign the message on your Trezor Hardware Wallet.

SIGNING YOU IN WITH YOUR TREZOR HARDWARE WALLET...

[Back to advanced sign in options](#)

A new tab (browser window) might open, with the following instruction:



Be mindful of your Trezor device. Trezor will ask you to sign a binary message to confirm your blockchain private key. Press the button marked as "**Confirm** ✓" on your Trezor device.



### Step 7: Your login, unlock or confirmation of the transaction is complete

A similar action (sign the message) will be required every time you want to perform a blockchain-related action on the CargoX Platform - for example, when you will be transferring a document or envelope, release cargo, or similar. This is now your equivalent of a digital signature - and nobody can forge it!

### *Ledger hardware wallet*

#### *About Ledger Nano S*

The Ledger Nano S and other Ledger hardware wallets are very secure blockchain storage and transaction signing devices. The private keys are generated by the device itself and they never leave the device. This makes them very safe as it is virtually impossible to steal or abuse blockchain private keys from them. To use the CargoX Platform securely, the basic and most affordable model Ledger Nano S satisfies the requirements. CargoX is compatible with all different Ledger devices.

**Please note that as of this writing, the Ledger wallet is only compatible with the Google Chrome browser.**

#### *Where to buy?*

The Ledger hardware wallets can be purchased from the [manufacturer's online shop](#) and from many [resellers](#) worldwide. We recommend checking your local electronics and computer stores, or your favorite online retailers, as they frequently also have the device in stock. Please, make sure the device is delivered in the originally sealed packaging - if the package is open or visibly damaged, reject it, as it might have been tampered with.

### Setting up Ledger Nano S for the first time

Before you can use the Ledger device you have to initialize it. This only needs to be done once. Because the Ledger software is evolving and it is being updated monthly, follow [Ledger's official instructions](#) - they are guaranteed to be always up to date and valid.

Here is a rough outline of this simple procedure:

1. The first thing you should do is install the latest version of the [Ledger Live app](#), which is required for the device to work properly on your computer. Note that administrator access is required to install the app. **If you cannot install the software, please get in touch with your system administrator.** Once installed, connect the Ledger device to your computer via USB cable.
2. Open the Ledger Live app.
3. Follow the application wizard and follow the instructions. Among other things be sure to:
  - a. Set up a security PIN for your Ledger.
  - b. Create a backup of your Ledger (write down 12 or 24 seed words on the paper card).
  - c. Store this paper card in a safe place (like a safe deposit box or in a corporate secure space). Anyone who can view these words, can compromise your private key (and potentially abuse your credentials), so handle this card with extreme care as per your company's security policy. This card enables you to restore your blockchain ID in case you forget a PIN or lose your Ledger device. Do not skip this step!
4. Complete the Ledger initialization process.
5. Prepare your Ledger to work with CargoX Platform by configuring the Ethereum app on it. Once the Ethereum app is open (if you do not have it, install it), go to **Settings** and verify that **contract data** is set to **Allowed** (you can leave Debug data at NOT Displayed).

After completing all the steps described above and in detail on Ledger's Live app or webpage or user's manual, you should have a properly configured Ledger hardware wallet device, protected by a PIN code and also a backup 12- or 24- seed words written on the paper and stored in a safe place. Once all this is done, you are ready to proceed with the registration of your CargoX account.

### Warning

THE MOST IMPORTANT STEP WITH INITIALIZATION OF LEDGER IS CREATING A BACKUP! IF YOU SKIPPED THIS STEP, DO IT NOW.

### Using Ledger with the CargoX Platform

After you have configured your Ledger hardware wallet it is time to link it with your CargoX Platform account. If you have not completed your account registration yet, do so by visiting <https://cargox.digital>.

### Note

If you have a problem logging in with Ledger, please make sure your device is updated to the latest firmware.

#### Step 1: Plug in your hardware wallet

Make sure your Ledger is connected via USB.

#### Step 2: Enter PIN

Use buttons on your Ledger to enter your PIN.



### Step 3: Open Ethereum app

Use your Ledger buttons to select the Ethereum application, open it by pressing both buttons at once. Once in the app, you should see the *Application ready* prompt.



### Step 4: Select "Ledger Hardware Wallet"

**Step 4.1: To link your Ledger with your CargoX account**, login to your CargoX account with your username and password, or with any other blockchain key, then go to **Account | My profile | Privacy & Security**, and click **Add**

**new blockchain key.** Select **Add an existing key** then select **Ledger Hardware Wallet** from the list and click **Next** to start the process.

**Choose an existing blockchain key**

If you already have a blockchain key, you can link it to your CargoX account. CargoX recommends using a hardware wallet, as it provides the best way of keeping your key secure.

- ☐ **Trezor Hardware Wallet**  
RECOMMENDED Small hardware wallet suitable for inexperienced users. If you don't have one yet, [visit their shop](#) to purchase.
- ☒ **Ledger Hardware Wallet**  
RECOMMENDED Best selling hardware wallet with a micro form-factor. If you don't have one yet, [visit their shop](#) to purchase.
- ☐ **BC Vault Hardware Wallet**  
RECOMMENDED Hardware wallet with a large screen which does not compromise convenience over security. If you don't have one yet, [visit their shop](#) to purchase.
- ☐ **Metamask**  
RECOMMENDED Browser extension which can save blockchain keys in the browser or act as a proxy to hardware devices.
- ☐ **Keystore File**  
Login with the private key stored on your computer.
- ☐ **Mnemonic Phrase**  
Login via entering your mnemonic phrase.
- ☐ **Private Key**  
Login by entering your private key.

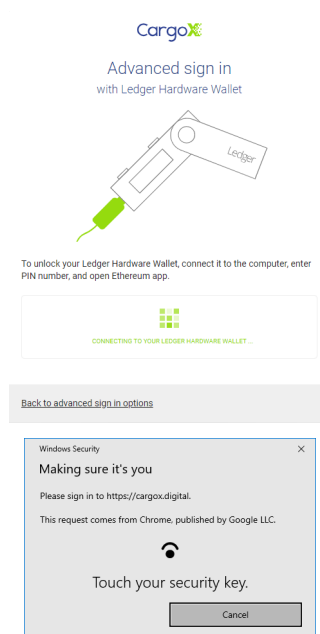
[Need help?](#)  
Follow step-by-step guide where we explain which is the best and most secure blockchain access type and how to set it up.

[Back](#) [Next](#)

**Step 4.2: To log into CargoX Platform with your Ledger,** go to the CargoX Platform login page, select **I want to login with my blockchain key**, then select **More options** and finally select **Ledger Hardware Wallet** from the list and click **Next**.

**Step 4.3: To unlock your Ledger for signing the blockchain transaction,** just follow the instructions for login with your Ledger from step 5 onwards.

CargoX advanced sign-in window will open, and display instructions.



## Note

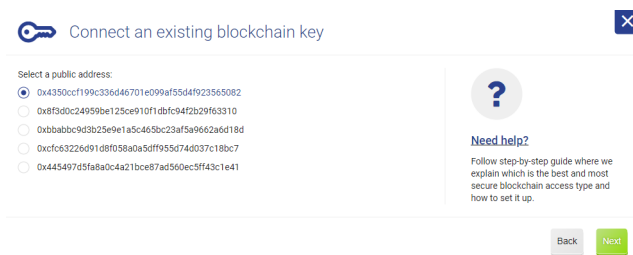
On Windows 10, you might see Windows security popup flashing 5 times. It might tell you that there is a problem, or it might instruct you to sign in. This is normal, just ignore it and do not click the Cancel button.

## Step 5: Select Ethereum address

Ledger supports multiple Ethereum addresses on one device. On the next screen you will be presented with a list of addresses configured on your Ledger wallet.

**It is essential that you choose one address and always use this address to log into the application.**

**When linking** your Ledger to your CargoX account, select the address and click Next. On the next screen confirm your email by typing in the verification number sent to your email. With that your blockchain adding process will end, as you don't have to do any action on the Ledger device itself.



Connect an existing blockchain key

Select a public address:

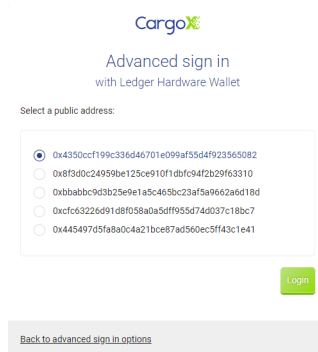
- ☒ 0x4350ccf199c336d46701e099af55d4f923565082
- ☐ 0x8f3d0c24959be125ce910f1dbfc94f2b29f63310
- ☐ 0xbbabbc9d3b25e9e1a5c465bc23af5a9662a6d18d
- ☐ 0xcfc63226d91d8f058a0a5dff955d74d037c18bc7
- ☐ 0x445497d5fa8a0c4a21bce87ad560ec5ff43c1e41

[Need help?](#)

Follow step-by-step guide where we explain which is the best and most secure blockchain access type and how to set it up.

Back Next

**When logging in with your Ledger, on unlocking, or confirming a transaction,** you will see a slightly different window, but displaying the same 5 addresses as on the login. Choose your address and click **Next**.



CargoX

Advanced sign in  
with Ledger Hardware Wallet

Select a public address:

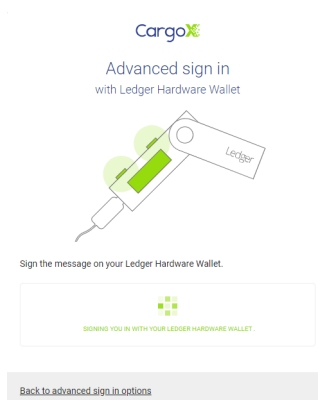
- ☒ 0x4350ccf199c336d46701e099af55d4f923565082
- ☐ 0x8f3d0c24959be125ce910f1dbfc94f2b29f63310
- ☐ 0xbbabbc9d3b25e9e1a5c465bc23af5a9662a6d18d
- ☐ 0xcfc63226d91d8f058a0a5dff955d74d037c18bc7
- ☐ 0x445497d5fa8a0c4a21bce87ad560ec5ff43c1e41

Login

[Back to advanced sign in options](#)

## Step 6: Sign the message on your Ledger

**To complete the log in, unlock or to sign the transfer,** you must sign a message. CargoX will show you this window:



CargoX

Advanced sign in  
with Ledger Hardware Wallet

Sign the message on your Ledger Hardware Wallet.

SIGNING YOU IN WITH YOUR LEDGER HARDWARE WALLET.

[Back to advanced sign in options](#)

## Note

On Windows 10 you might see the Windows security popup flash a number of times.

Check your Ledger device. When its screen changes to **Sign message** do the following:



Click the right button once, which will display a transaction message similar to this:



Then click the right button again, and the display will change to ✓ **Sign message**:



**Now press both buttons simultaneously to confirm signing.**

#### **Step 7: Your login, unlock or confirmation of the transaction is complete**

A similar action (sign the message) will be required every time you want to perform a blockchain-related action on the CargoX Platform - for example, when you will be transferring a document or envelope, release cargo, or similar. This is now your equivalent of a digital signature - and nobody can forge it!

## MetaMask software wallet

MetaMask is an add-on for [Chrome](#), [Firefox](#), [Opera](#), [Brave](#) and the new [Microsoft Edge](#) browsers. It is also available for mobile devices (Android and IOS). MetaMask is not supported on older browsers such as Internet Explorer and Safari.

**This extension stores your blockchain private keys and enables you to sign transactions without revealing your private key - which is one step closer to the security hardware wallets provide. If you are unable to procure a hardware wallet, use MetaMask.**

Because it adds functionality to a normal browser context, MetaMask requires your permission to read and write to any web page.

## Setting up MetaMask for the first time

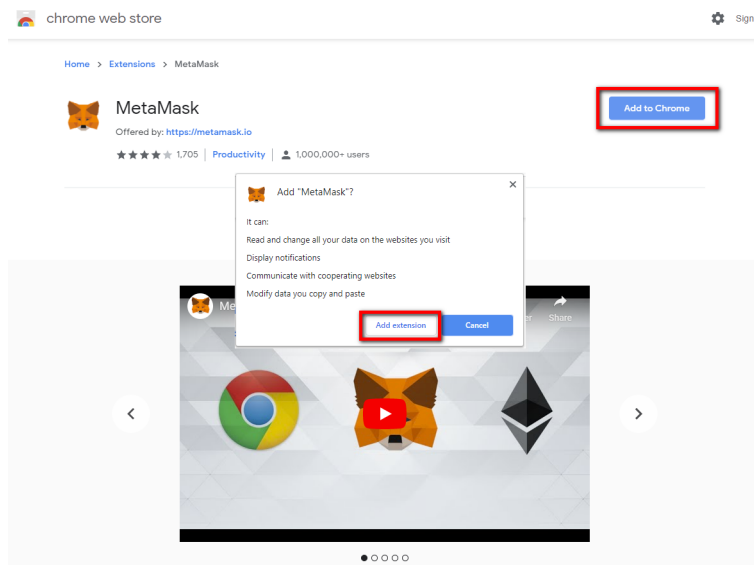
### Step 1: Install the extension

MetaMask needs to be installed into your specific browser. This needs to be done only once.

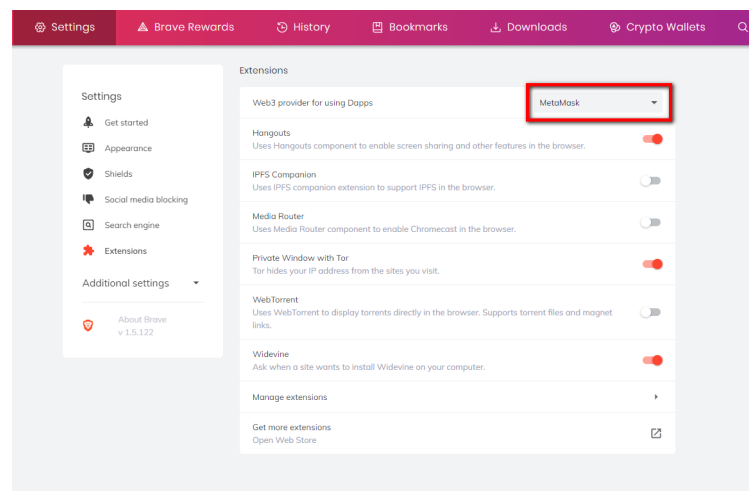
Administrator access is required to install the MetaMask. **If you cannot install the add-on software, please get in touch with your system administrator.**

Download the extension at <https://metamask.io/download.html> and choose the version for your web browser.

Usually, you need to click the **Get Extension** and confirm the installation of the add-on, similar to what is shown below:



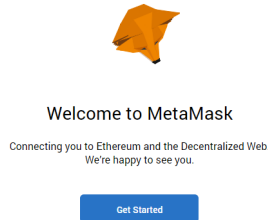
Alternately, use the Brave browser, which focuses on privacy and blockchain solutions. Brave already comes bundled with the MetaMask extension. You need to enable it by visiting the preferences page, section Extensions and choose MetaMask as the default Web3 wallet provider for using Dapps:



## Step 2: Prepare your MetaMask

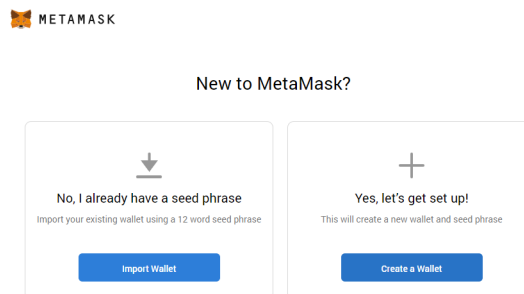
MetaMask helps you manage different Ethernet blockchain private keys, much like a hardware wallet would. To prepare your MetaMask, you need to create at least one wallet. **This step needs to be done only once.**

Click on the **MetaMask icon** (brown fox) to open the plugin, click **Get Started**.



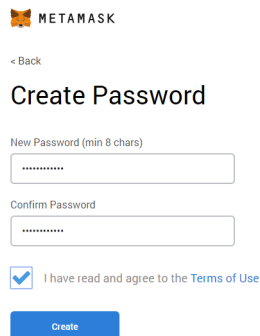
### Step 2.1: Create a new wallet on MetaMask

To set up a new account and wallet, click **Create a Wallet**.



### Step 2.2: Create a password

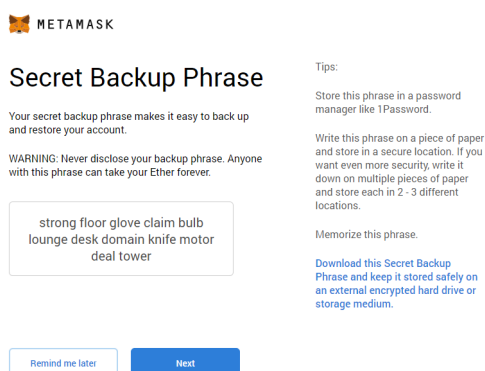
The first thing you need to do is create a password. **This password is used to securely store your MetaMask, so make sure you pick a good password and write it down somewhere safe.** Losing this password will mean you will not be able to access your blockchain key stored in MetaMask.



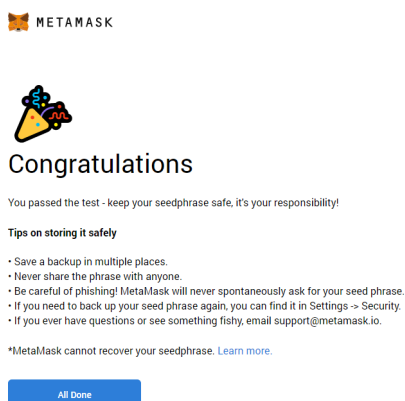
### Step 2.3: Save seed words

After creating a wallet, you will get a list of 12 or more **seed words**. **These words help you recover your account on another computer if your computer gets lost or stolen, the disk breaks down, or if you forget your MetaMask password.**

Write down these words on a piece of paper with a ball-point pen and store it somewhere safe (e.g. in a safe), away from your PC. Anyone who can view these words can compromise your private key (and potentially abuse your credentials), so handle this card with extreme care as per your company's security policy.

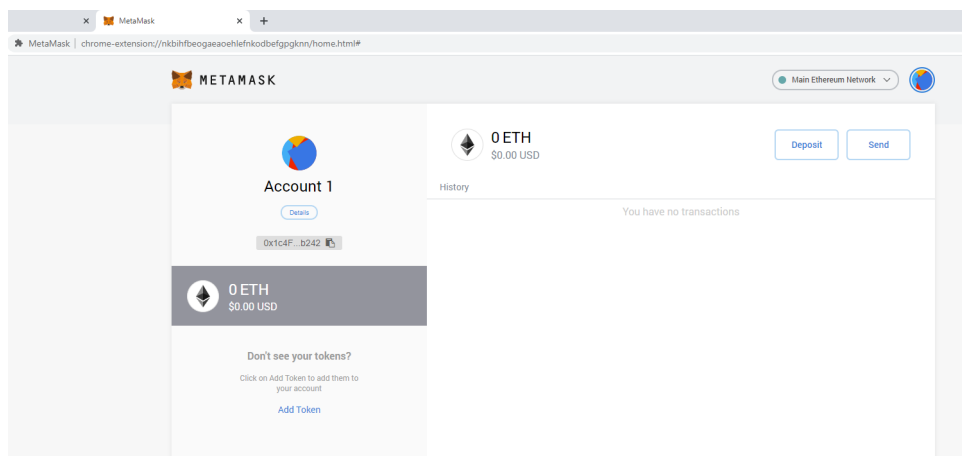


Make sure you follow all the instructions.



## Step 2.4: MetaMask initialization completed

You will be presented with the main MetaMask screen, as seen below. Depending on the browser this might open as a popup, new tab, or new browser window.



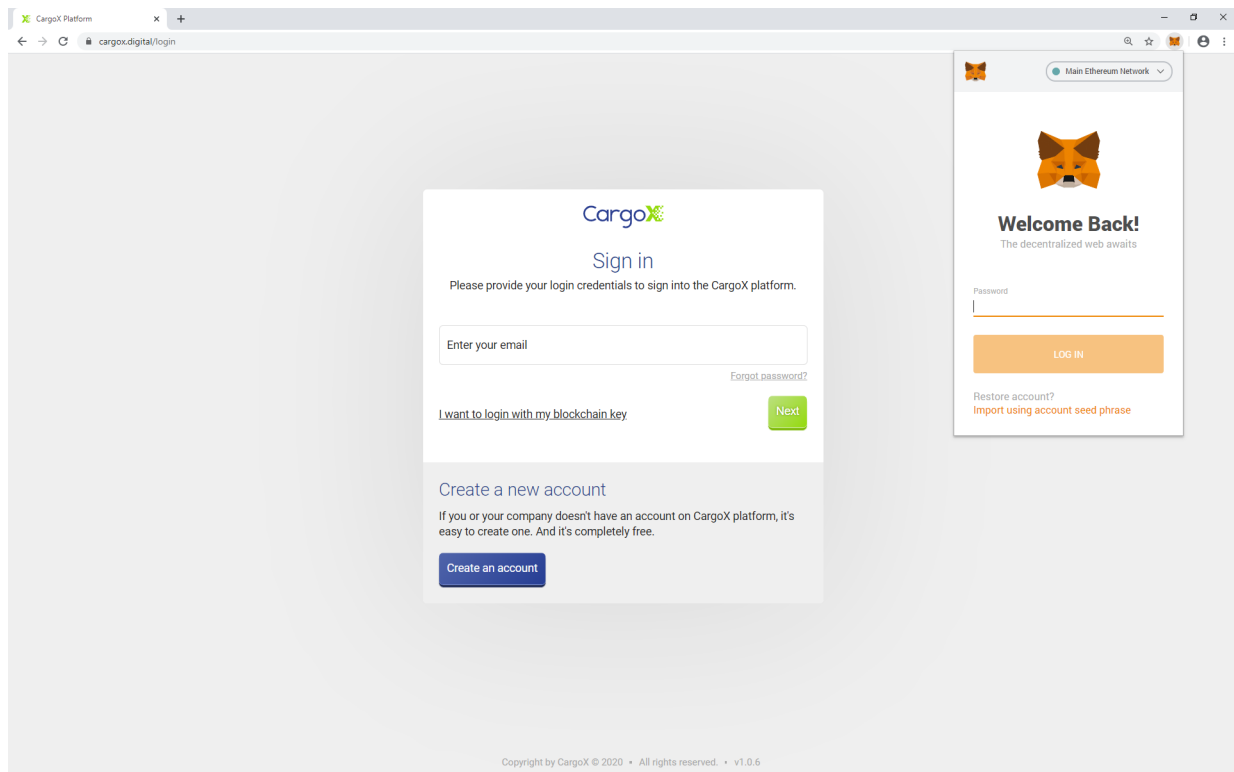
After you have configured your MetaMask account, it is time to link it with your CargoX Platform account. If you have not completed your account registration do so by visiting <https://cargox.digital>.

## Using MetaMask with CargoX

### Step 1: Unlock MetaMask and log in to CargoX Platform

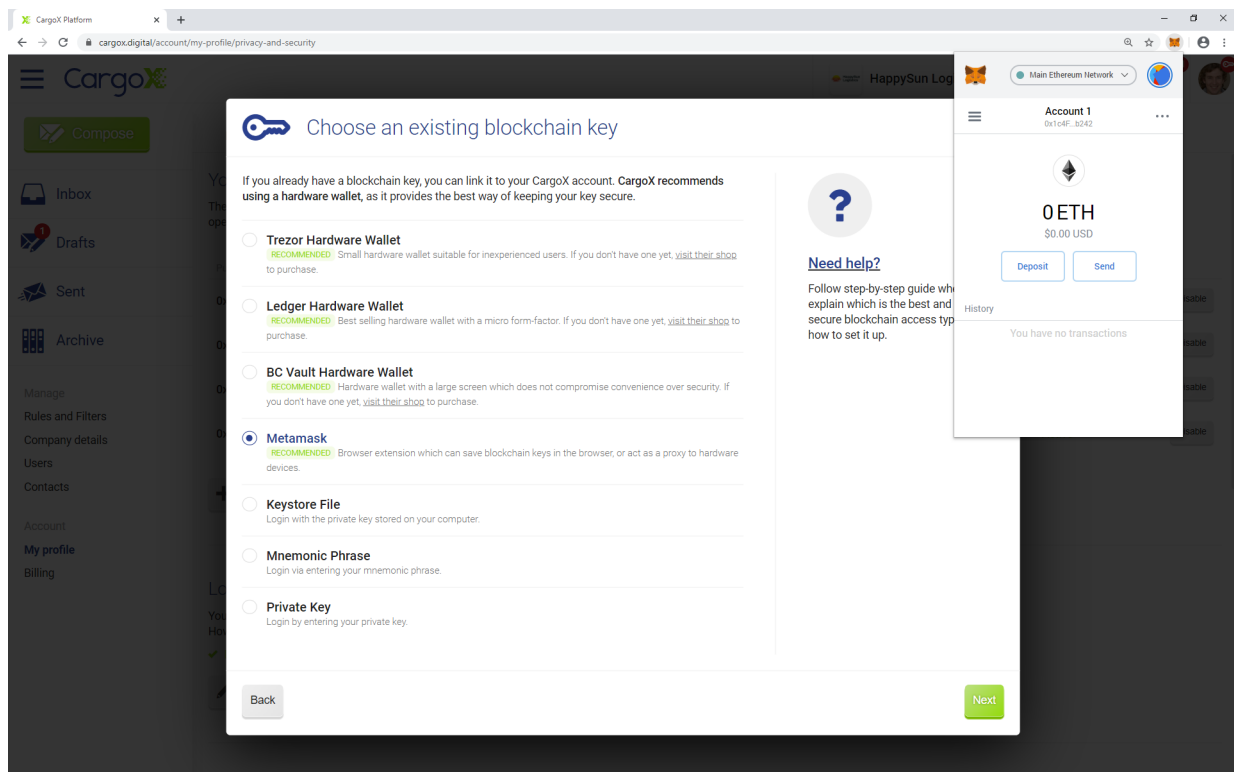
Click on the MetaMask icon in your browser to open MetaMask window (usually it appears in the upper right corner).

Unless you have recently unlocked your MetaMask account, you will have to enter the password. For security reasons MetaMask will ask you for the password after every restart of the browser.



## Step 2: Select MetaMask

**Step 2.1: To link your MetaMask to your CargoX account**, log into your CargoX account with your username and password, or a linked blockchain key, then go to *Account | My profile | Privacy & Security*, and click **Add new blockchain key**. Select **Add an existing key** then select **MetaMask** from the list and click Next.



**Step 2.2: To log into the CargoX Platform with your MetaMask**, go to the CargoX Platform login page, select **I want to login with my blockchain key**, then select **More options** and finally select **MetaMask** from the list, then click **Next**.

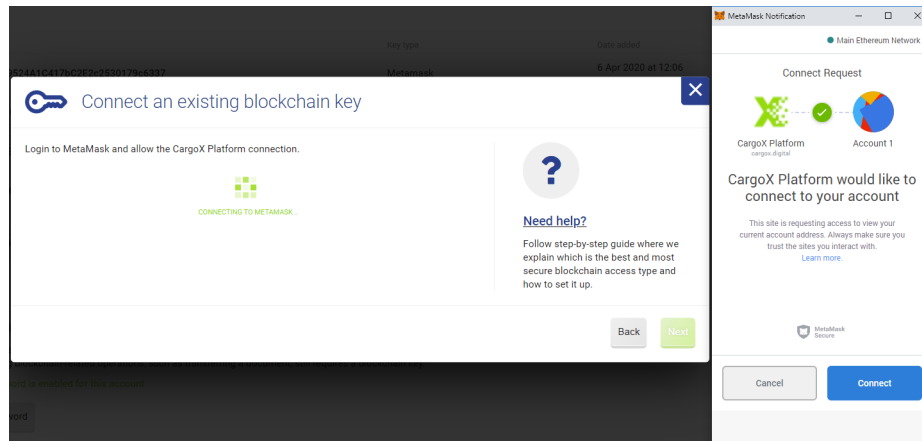
**Step 2.3: To unlock your MetaMask for signing the blockchain transaction**, just follow instructions for logging in with your MetaMask from step 3 onwards.

The CargoX advanced login window will open, containing further instructions.

### Step 3: Authorize the CargoX Platform to communicate with the MetaMask

MetaMask will display the Connect request pop-up window, asking you to allow CargoX Platform to communicate with your MetaMask. Click the **Connect** button to continue.

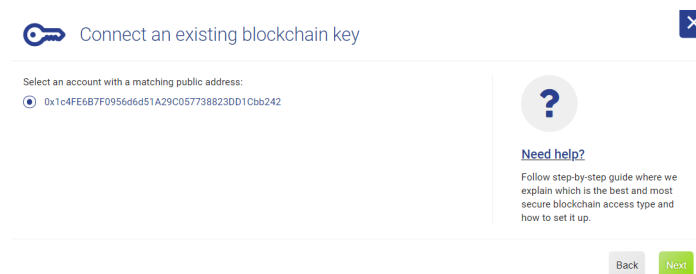
This will allow the CargoX Platform to read the public address of your MetaMask account, and display it for confirmation.



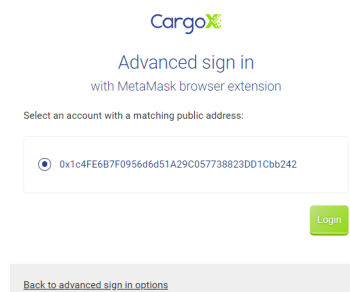
### Step 4: Verify the MetaMask account public address

If you have multiple accounts stored in your MetaMask, verify that this is the one you wish to use, then click **Next** to continue. It is important that you choose the same address every time.

**When linking** your MetaMask to your CargoX account, verify the address and click **Next**. On the next screen confirm your email by typing in the verification number that was sent to your email. With that your blockchain key adding process will end - there is no need to perform any additional steps in the MetaMask.

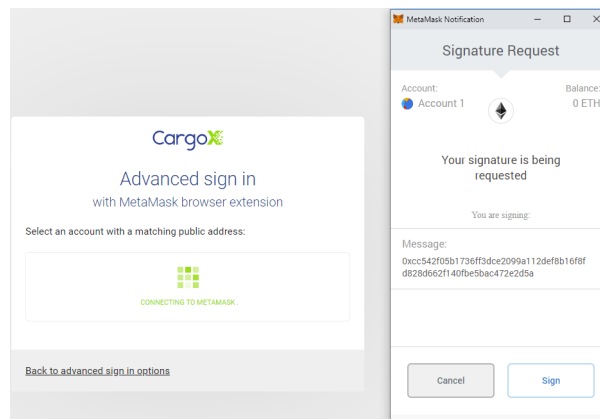


When **logging in** with your MetaMask, or **unlocking it for signing a blockchain transaction**, a different but similar screen will appear, where you again verify that MetaMask is providing the right public address:



### Step 5: Confirm the transaction by Signing it

A MetaMask window will appear, displaying the challenge message you need to sign with your private blockchain key, in order to confirm action. Click the **Sign** button to continue.



### Step 6: Your login, unlock or confirmation of the transaction is complete

A similar action (sign the message) will be required every time you want to perform a blockchain-related action on the CargoX Platform - for example, when you will be transferring a document or envelope, release cargo, or similar. This is now your equivalent of a digital signature - and nobody can forge it!

## Contacts

### Contacts

**You can only exchange documents with the companies you are connected with on the CargoX Platform.**

In the **Contacts** section, you can see the details of companies you are connected with. Here you can start the connection process by sending invites to connect, and you can manage received invitations.

### Know your customer!

Due to security and privacy reasons, **CargoX does not provide a global list of companies that are using the CargoX Platform.**

Instead, you are building your own ecosystem, your own verified chain of trust. The concept of a **verified chain of trust** is used also by LinkedIn and other large social networks.

It is completely up to you to connect with others, as you and you alone know your customers and your business partners.

The connection process is simple - you only need to provide the email address of your contact at the company you want to connect with. Invited person will receive an email from the CargoX Platform, along with all the information about who wants to connect with them (your and your company's information).

This gives invitees 100% control over who they connect and transact with on the CargoX Platform. Since companies remain in complete control over all their connections (and can remove them at any moment), they are completely protected against the risk of trusting a 3rd party over a KYC or other ID verification process.

When the invitee accepts the sent invitation, both companies see the other company in their contacts list - along with all contact details and other information.

### Warning

When you receive an invitation to connect **MAKE SURE THAT YOU KNOW THIS PERSON AND DOUBLE CHECK THE DETAILS OF THE COMPANY. FAILING TO CHECK MIGHT RESULT IN SENDING DOCUMENTS TO A WRONG COMPANY.**

### **Note**

Any side can remove a connection with any particular company at any time.

### **How to connect**

**There are two ways how you can connect with a Company.**

1. Send an invite to them. All you need is the email address of your contact there.
2. Accept the received invitation, if they have sent an invitation to connect first.

### **Benefit 1: Always up-to-date contacts**

Building your own community of companies around you can give you a competitive edge.

Once two companies are connected on the CargoX Platform, they both see contact details of each other.

### **Note**

As a side benefit - because everyone is responsible for maintaining only their own data (through their My company | company details), you do not have to maintain hundreds of addresses, phone numbers, contact persons, and other information for all the companies you work with. You will see the latest relevant data anytime they update their profile.

### **Benefit 2: Private notes**

You can even add **private notes** for each company. These can be instructions for your colleagues on how to handle a particular company, who your contact person is etc. Only users from your company see the note.

### **Send an invite to connect**

You can only exchange documents with companies who you are connected with on the CargoX Platform. As explained in the Contacts section, there are two ways how companies can connect. You can accept the invitation received from other parties, or you can invite a company. Let's review this process.

### **Note**

Don't use this form to invite your colleagues. To add a user to your company use the users section.

### **Note**

Be sure to complete your company's profile (and add logo) and your contact details like phone and title in your profile, before sending the invitations to other companies. This way receiving party will receive more information about your company and yourself which will make it easier for them to verify your authenticity and accept your request to connect faster.

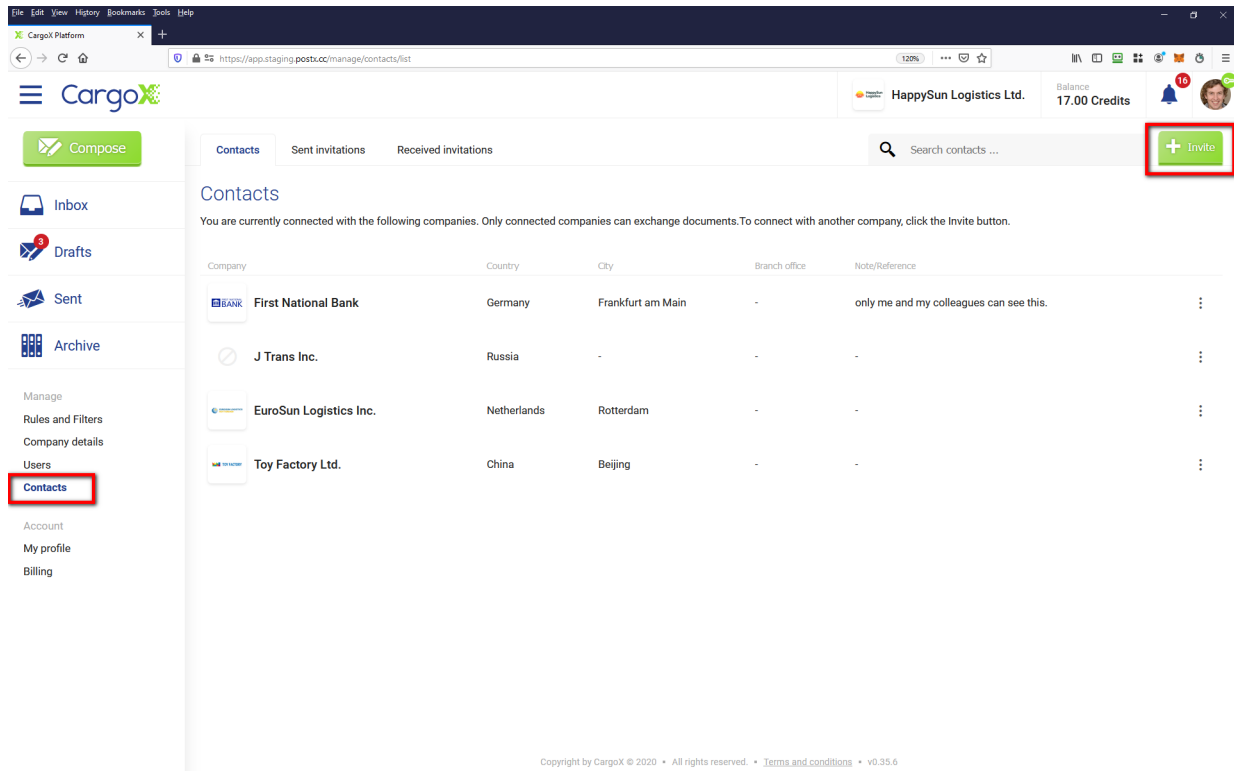
## Attention!

Quick instructions: To connect with another company go to **Contacts**, click the green **+Invite** button. Enter email address of company representative in the **User email** field. Click **Send Invitation**. In **Contacts** you can see the status of your connection request.

You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).

### Step 1: Sending the invitation to connect

This can be done in **Contacts** by clicking the green **Invite** button.



### Step 2: Enter the email address

#### Note

To prevent double registrations, **invite only one contact per company**.

Enter the email of your contact at another company. You can invite more than one company at a time - just separate the emails with spaces or commas. Once the invitation is accepted, the company will show up automatically in your contacts.

Optionally enter an invitation message that will be sent with the invitation email.

Invite to join

×

Enter emails of users you would like to invite. Separate them with spaces or commas. Once the invitation is accepted, the company will show up automatically in your contacts.

User email

You can enter multiple emails. You can also paste a list of emails.

Include message to invited user (optional)

Close

Send invitation

An automatic email will be sent to these recipients, along with your contact details, and with a message that you want to connect with them on the CargoX Platform for the purpose of exchanging digital (original) documents.

### What happens after you send the invite?

If the user you are inviting is already a member of the CargoX Platform, they will get an email and an in-app notification, that you wish to connect. When they accept the connection, the process is completed and you will see each other's details in your **Contacts** section.

If the user is not yet a member of the CargoX Platform, they will receive an email inviting them to the platform. The email will include all the instructions on how to create a free account on the CargoX Platform. When they complete the 2-minute registration process, and they accept your invitation to connect in the app, you will see each other's details in the **Contacts** section.

### Step 3: Review sent invitations

You can see your sent and received invitations in the Contacts, by clicking on tabs.

Inviter company	Invited user	Invited by	Invitation sent on	Status
First National Bank	John Campbell	Susan Muller	1 Apr 2020 at 11:57 a day ago	Accepted
J Trans Inc.	John Campbell	Second User	1 Apr 2020 at 11:35 a day ago	Accepted

If the invitation is still pending after several days, call your contact at the company you wish to connect to and kindly remind them to respond.

### Note

We strongly suggest, that you first talk to your contact in the company you want to connect to on the CargoX Platform. Inform them in advance that you will invite them to the CargoX Platform. Maybe they are already on the CargoX Platform and if they give you the email of their CargoX account this will speed up the process.

### Tip

**You do not have to explain the CargoX Platform operation to your partners - we will do it!** We have prepared a guide on how to approach your business and transport partners about the CargoX. Use it as suggested, as it will save you time! How? Connect us with your partner and we will explain CargoX benefits and provide technical support to them directly.

## Managing received invitations

You can only exchange documents with companies that you are connected with on the CargoX Platform. As explained in the Contacts section, there are two ways how companies can connect. You can send the invitation to connect to a company, or you can accept the invitations received from others. Let's review this process.

### Note

When you receive an invitation to connect **MAKE SURE THAT YOU KNOW THIS PERSON AND DOUBLE CHECK THE DETAILS OF THE COMPANY. FAILING TO CHECK MIGHT RESULT IN SENDING DOCUMENTS TO A WRONG COMPANY.**

### Step 1: Review received invitations

When you receive an invitation to connect, you receive an email notification and also an in-app notification. To review and accept the received invitation to connect, go to **Contacts** (in the sidebar), and click on the third tab - **Received invitations**.

The screenshot shows the CargoX platform interface. In the sidebar, the 'Contacts' option is highlighted. The main content area is titled 'Received invitations' and contains a table of invitations. The table has the following data:

Inviter company	Invited user	Invited by	Invitation sent on	Status
Customs Authority Origin	Linda Zhang	Peter Kern	16 Apr 2020 at 11:03 7 days ago	Accepted
Sea Carrier Origin	Linda Zhang	Peter Kern	8 Apr 2020 at 18:08 15 days ago	Accepted
Chamber of Commerce	Linda Zhang	Peter Kern	8 Apr 2020 at 10:26 15 days ago	Accepted
Toy Store Inc.	Linda Zhang	David Anderson	5 Apr 2020 at 22:42 18 days ago	Accepted
HappySun Logistics Ltd.	Linda Zhang	John Campbell	5 Apr 2020 at 07:00 18 days ago	Accepted

### Step 2: Verify the sender

You are responsible for thoroughly verifying the sender's details! Compare their details, name of the contact person, address, email, and phone number, against your address book and information that you have about that person. If you are in doubt, verify in the real world by calling or emailing the company you received an invitation from. **Only accept an invitation to connect when you are sure the invitation comes from a legitimate company or person that you conduct business with.**

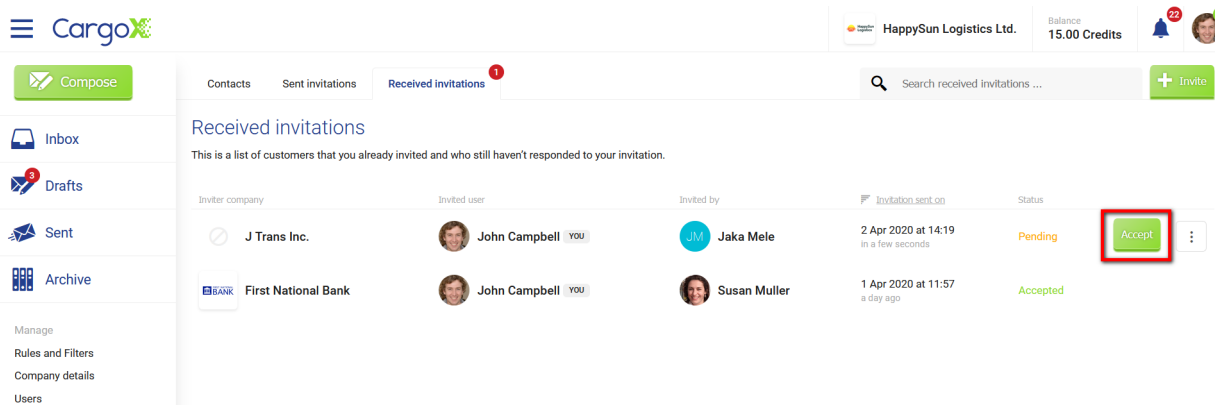
To show details about the company that sent you the invitation to connect, click on the inviting company and the company details, including contact details will open.

### Warning

If you receive an invitation but do not know or do not recognize the sender, or the email or phone numbers seem wrong, you should NOT accept the invitation. Contacts also serve as a basic security and privacy mechanism and prevent identity theft, spam, and spying between competitors. Only connected companies can exchange documents, see their company details, and view each other's public blockchain addresses (but never the private blockchain keys!).

### Step 3: Accepting the invitation

When you are ready to accept the invitation and connect with the company, click the green **Accept** button. That is it!



### Warning

If you are positive that you are being invited by scammers / fake companies, you can click on the three-dotted icon next to accept button, and Reject the invitation. If such an invitation is sent to you repeatedly, report it to [support@cargox.io](mailto:support@cargox.io).

## Interface

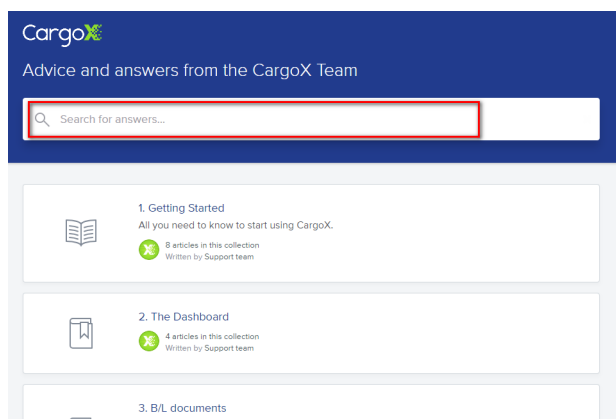
### I need help!

If you have a question, a suggestion, or if you want to report a software bug, there are many ways to contact us.

#### 1. User's guide

Check out the rest of the User's manual here at <https://help.cargox.digital>. Do not miss the FAQ section as well - it contains many practical questions and answers.

Use the search. Enter keywords, associated with your question in the search box:

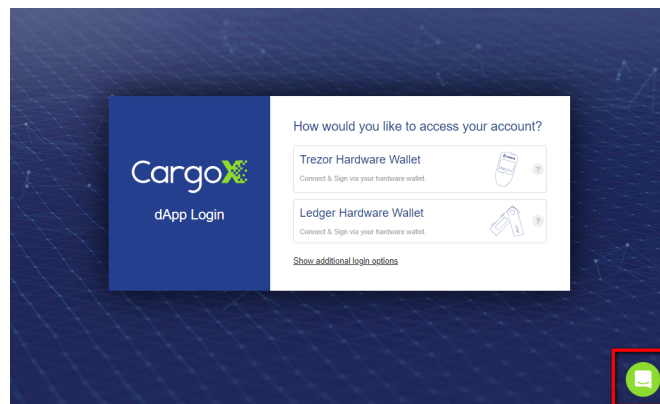


#### 2. Contact us via support chat

The support chat is always available in the lower corner of the CargoX Platform user interface. Just click the round green icon and it will activate.

## Tip

Make sure you are logged into your CargoX account before opening the chat. This way it will be faster for us to provide support as we can skip the identification steps.



### 3. Send us an email

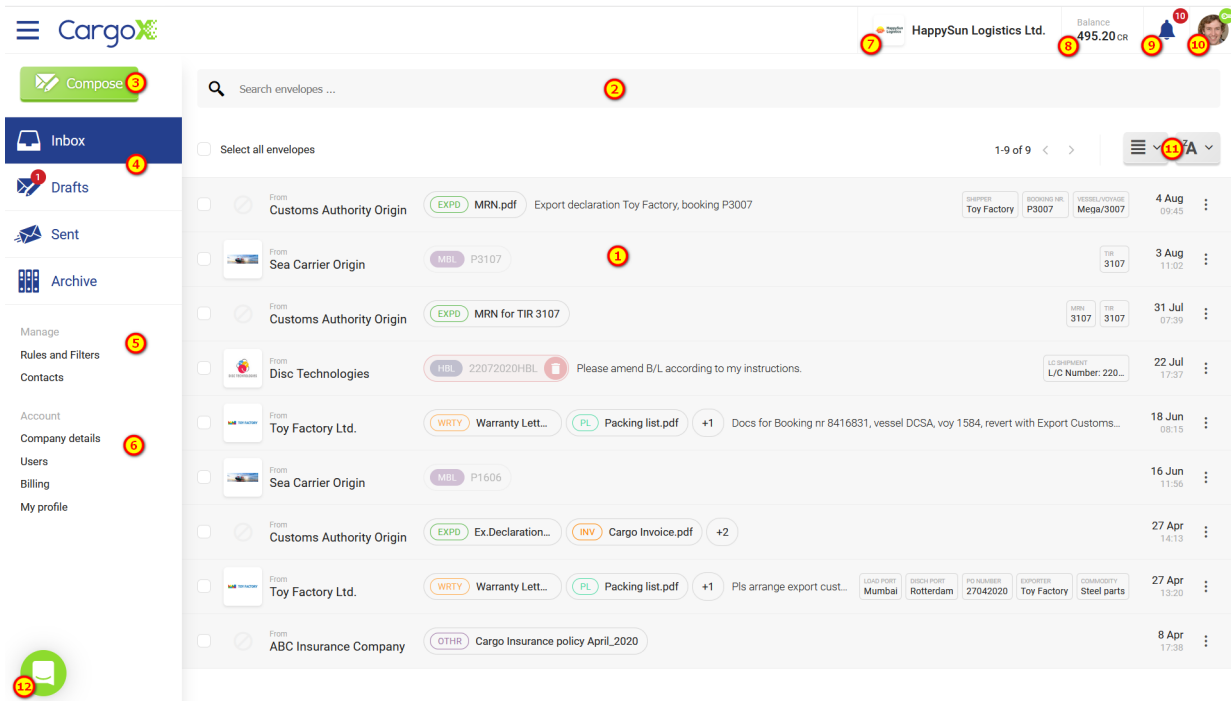
Send us an email at [support@cargox.io](mailto:support@cargox.io).

### 4. Contact your designated contact at CargoX

Issuers and large enterprise can contact their designated business contact at CargoX.

## The workspace

To help you get acquainted with the CargoX Platform user interface, here is a quick overview:



**(1) Inbox:** The main, central part of the screen lists the smart envelopes that hold documents. Each entry represents a smart envelope, and the rounded icons represent the attached documents. Click on the envelope entry to open a side panel with more details. To learn more read about the Smart envelopes and documents.

**(2) Search:** A powerful search allows you to quickly find any document. Enter search terms in the search entry field. You can narrow your search by using the tags like **Sender:** or **Document type:**. Although most of the documents are

unstructured PDF documents, the search also tries to find matching keywords in the content of these documents. To achieve the best results, use tags, and the manually entered metadata when uploading new documents.

**(3) Compose button:** This starts the process of creating a new smart envelope and documents. This process allows you to send multiple documents and a message for the recipient, as well as transfer ownership of the documents.

**(4) Mail folders:** Your envelopes (they operate similar to email) are sorted in folders.

- The **Inbox** folder contains documents currently in your possession - you own these documents. You can perform actions on all the documents you own.
- The **Drafts** folder contains all the envelopes you started working on.
- The **Sent** folder contains envelopes that you sent to companies you are connected with.
- The **Archive** folder is a place where you archive envelopes and documents you have completed working on.
- The **Incoming** folder appears only when you have a pending incoming envelope for which you need to manually confirm the acceptance and cover sending costs.
- The **Returned** folder will contain all envelopes and documents that were not delivered to the recipient.

**(5) Manage:** This section allows you to manage your company's account details.

- **Rules and Filters** allow you to set up custom notifications depending on various rules. For example, send an email notification to Jim if we received a document from company ABC where there is a B/L document with voyage number 123, or similar.
- **Contacts:** See details of the companies you are connected to on the CargoX Platform. In the contacts, you can send an invitation to connect to other companies, such as business and transport partners. As a security feature you can only exchange envelopes and documents with companies you are connected to, therefore it is mandatory to be connected.

**(6) Account:** Holds your account-specific settings.

- The **Company details** section allows you to enter all of your company's contact and business details needed for business purposes, including address, VAT number, and logo (only if you are authorized to do so). Please enter them correctly and fully.
- The **Users** section is where you create the CargoX Platform accounts for your co-workers and manage their permissions and blockchain keys (only if you have permission to do so). You can add unlimited users under your Company's account.
- In the **Billing** section, you can buy new units for sending or registering documents through the blockchain, review units spending, download invoices, and manage your billing details. You also have direct access to the latest price list.
- **My profile**, where you can edit your personal data, add your phone number, manage your blockchain keys, change your password, and upload your photo or avatar image.

**(7) Company logo:** Clicking on your company logo or company name opens the My Company | company details page.

**(8) Account balance:** Here the number of units you have available on your account is displayed. Click the number for a detailed summary of your units. While the majority of document types can be sent for free, some specific documents have an associated cost. Visit CargoX Platform pricing policy for more info. The total price of the envelope (in units) can be seen when composing a new envelope.

**(9) Notifications:** The bell icon will display a red circle with a number of unread notifications. Clicking this icon opens the notifications listing, where notifications regarding received envelopes, new contacts, blockchain keys, etc., are displayed. Notifications are actionable so click on them to access specific actions!

**(10) Your photo / avatar image:** This allows you to check whether your blockchain key is locked or unlocked, and it provides a shortcut to your profile and other settings. It initially shows your initials, and once you upload your photo it will show your face or another avatar image.

**(11) Workspace customization:** Here you can decide on the envelope and document view, and the way how envelopes are sorted in the folder view.

**(12) Support chat:** Have a problem or a question? Click the green chat icon to open real-time chat with our support staff. Life support is available every workday 8 am - 8 pm (UTC+2). Other ways to get help.

## Smart envelopes and Smart documents

Managing your documents on the CargoX Platform is much simpler and even more intuitive than managing your physical paper documents.

### Why a smart envelope?

When handling paper documents, you never send a document - you always send an envelope that contains one or several documents. To send it, you have to provide a destination address, so that the courier can find the recipient.

It is the same on the CargoX Platform. It handles electronic envelopes and electronic documents. Our technology, combined with a public blockchain, preserves all the key functionalities of the physical paper documents while adding numerous benefits, like security and speed of transfer. That is why we call them **smart envelopes and smart documents**.

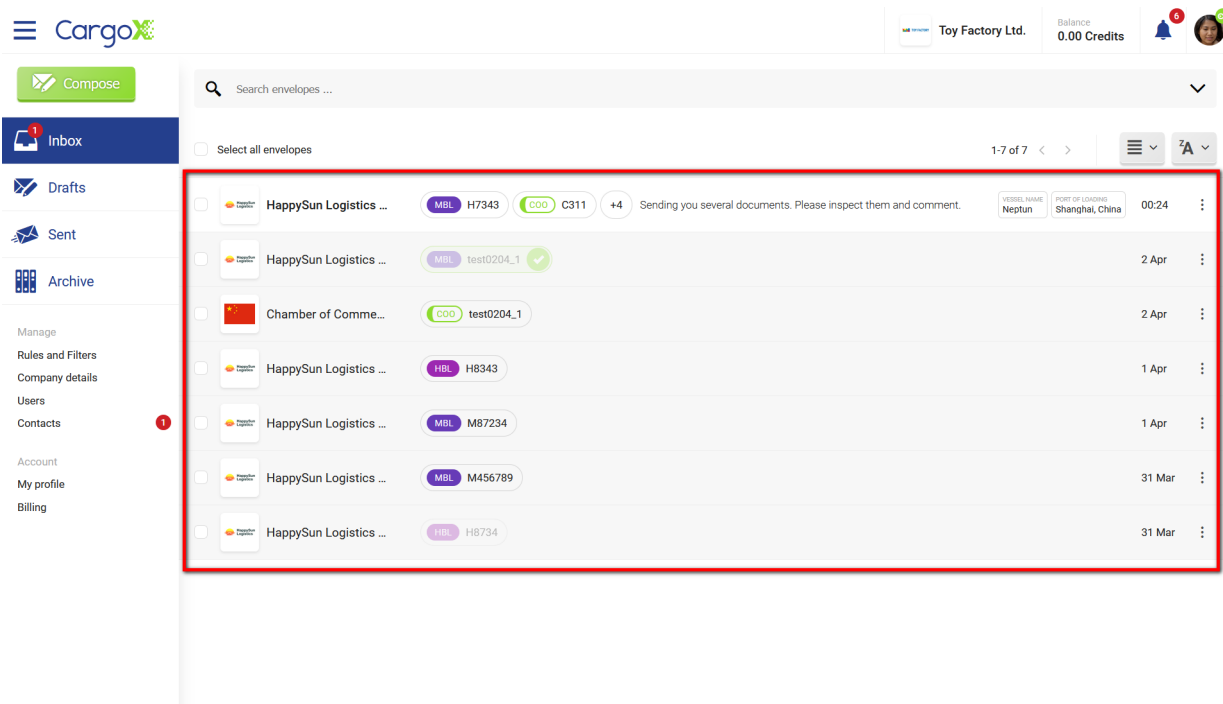
A **smart envelope** allows you to send one or several smart documents to a recipient.

A **smart document** is an electronic document, represented by a PDF file or any other supported file format. The CargoX Platform calculates the digital fingerprint (hash) of every uploaded document, which allows all involved parties to verify the authenticity of that original digital document. Each document is also encrypted at the time of the upload, and always stored and handled by the CargoX Platform in the encrypted format. On a document level, the CargoX Platform also provides a full timestamped audit log. This documents all events through the lifetime of a particular document. It records who created it, each ownership transfer, and finally the accomplishment of the document.

### Your Inbox

Everything starts in your **Inbox**. On the left side, there is a list of folders that hold your smart envelopes. All users see **Inbox, Drafts, Sent, and Archive**, but more folders are available. Read more about folders in the CargoX Platform workspace which provides an overall explanation of the workspace and user interface.

The red number indicates how many envelopes require your attention. It always represents the number of yet unopened or unread envelopes.

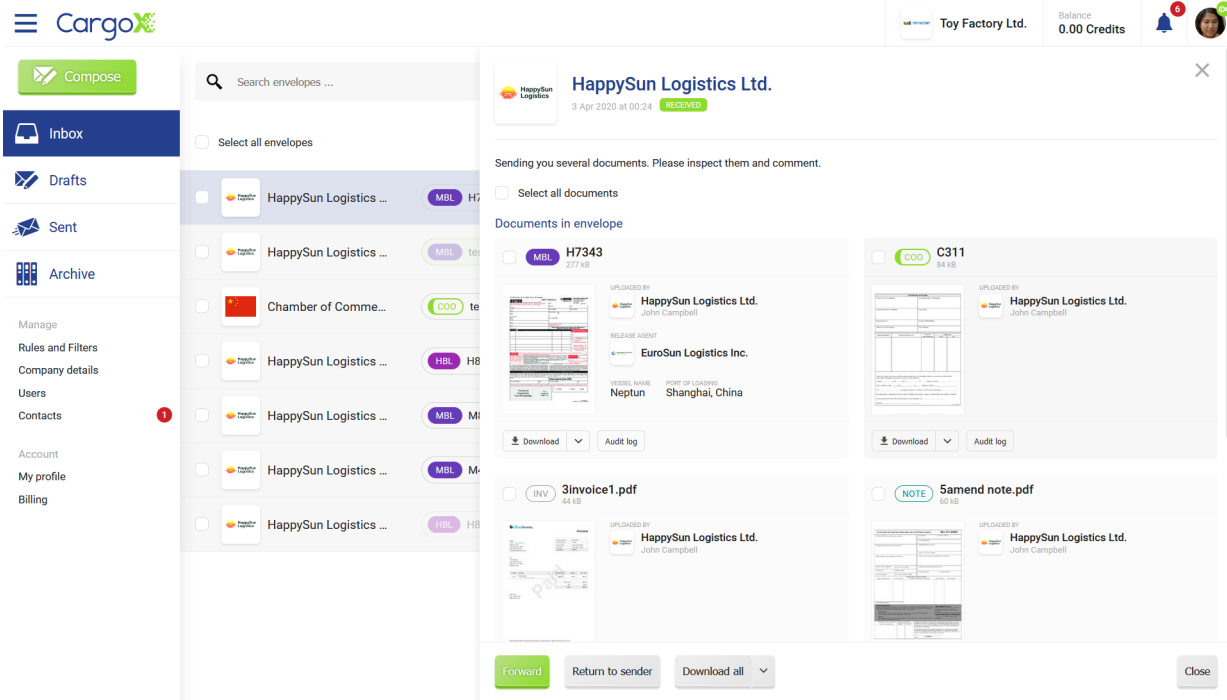


Each line in the central section of the screen represents one smart envelope. In the screenshot above the first line visually stands out (the sender's name is bold and the background is light) as it has not been opened yet. It is already visible who sent it, when, which documents it contains, and some additional information.

## Smart envelope

To open an envelope click on the entry. The contents are shown, including a message (optional) at the top, followed by the complete list of included documents with live thumbnail preview.

At the bottom several action buttons are available.



## Document types and blockchain support

The CargoX Platform supports many document types, including but not limited to different bills of lading, certificates, letters of credit, invoices, reports, claims ... Depending on the document type these documents can have **full, partial, or no blockchain support**.

### Authenticity and ownership guarantee

This means that the CargoX Platform can **guarantee authenticity** (whether a digital document is unchanged) and **track the ownership** of any document (who is currently in possession of a specific document).

### Full blockchain support documents

Some documents, a B/L for example, which is a document of title, need both. A B/L document is not allowed to be changed while it is transferred, but it is equally important to know who currently owns it. That is why it requires **full blockchain support** (tracking authenticity and ownership). This is indicated by a document icon with a solid background:



### Partial blockchain support documents

For other documents, for example certificates, it is only important to be able to guarantee the authenticity, to detect whether the document is an untouched original. In the CargoX Platform this is called **partial blockchain support** - indicated by a document icon with a partially solid background:



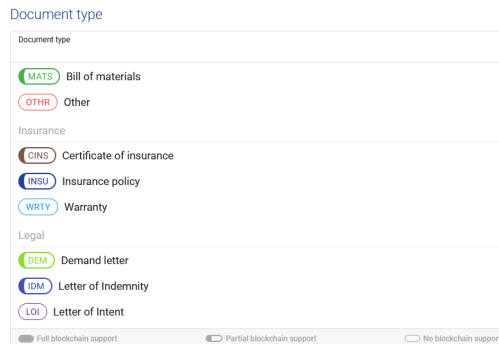
Here ownership is not important, as anyone can create a legitimate copy of the certificate and still use it for the original purpose - for example, a distributor of goods gives a copy of a manufacturer's certificate to every retailer. At the same time it is important to know who issued this certificate and that the document you have is still identical to the issued one (and therefore it is the original).

### No blockchain support

The third type of documents are just your plain digital documents like an invoice or a note, that are today exchanged through email and they require no special features (also, **no blockchain support**). This is indicated by an icon without a solid background:

WRTY 4Safety-Resident... INV 3Invoice1.pdf

Besides the convenience of having all your documents in one envelope on one platform, there are further benefits why use CargoX to send these documents. One is the **digital storage (Archive)** provided by CargoX. The other is that even for these documents CargoX is calculating the digital fingerprint which results in a digital trail. The audit log for these documents is stored off the blockchain, but still, a digital trail exists that you have sent a document and there is proof that the document was received by the recipient. It also proves the document was not intercepted and changed by any third party, a hacker or other person - this is something that email does not provide!



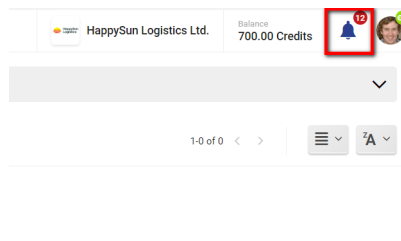
## Notifications

Every time something important happens with your CargoX account, the notification icon will light up and display a brief description. This happens when:

- you receive a document
- a business partner sends you an invitation to connect
- a company reacts to your invitation, or
- new units are loaded onto your account...

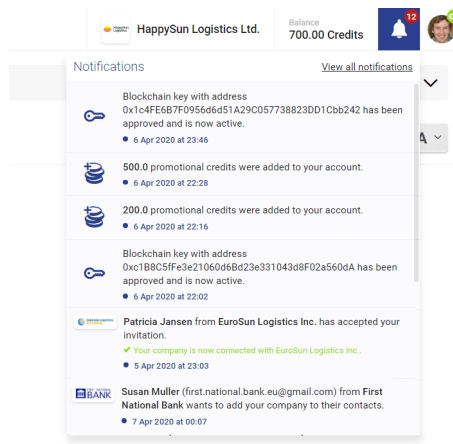
### The notification icon will light up!

A red icon will display a number of notifications you have not yet acted upon.



Once you click on the red notification icon, a notification window will appear. The list of notifications is actionable - click a notification entry, and it will take you to the appropriate section of the CargoX Platform. For example, when you see a pending invitation, a click on the entry will take you to Contacts, where you can verify and accept the invitation.

If you click on the **View all notifications** link, you will be taken to a page where you can review all past notifications.

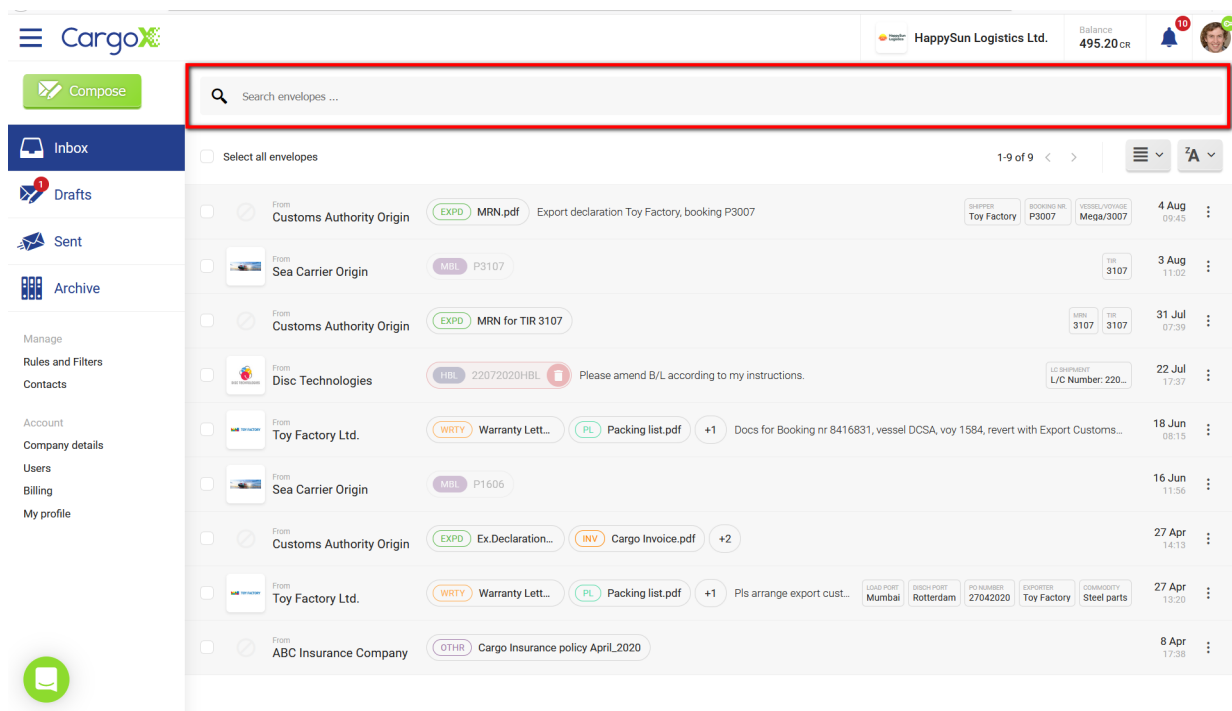


Depending on whether you sent invitations or you have just received them, the listing will be displayed slightly differently. You can see a log of your past actions - whether you accepted or rejected the invitation to connect.

Clicking on a notification will indicate that you have read it or acted on it.

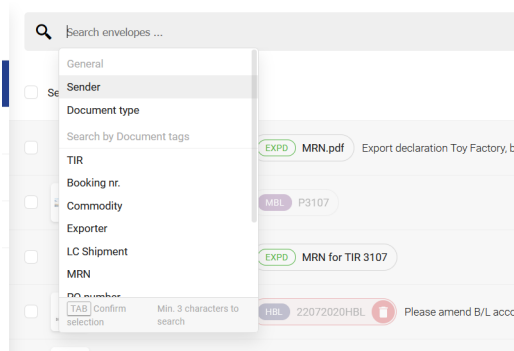
## Search

To search your CargoX Platform account for documents, click into the search field.



You can start by entering **search keywords** that have to be at least 3 characters long. The search will find all documents where either the document name, filename, sender, recipient, metadata, or document's contents (if available) matches the search query.

With advanced search functionalities, you can limit the search by **Sender** or **Document type**.



For more powerful search functions and document organization, you can also use **tags**. Tags are the text fields that can be added in **document properties** when uploading a document - either by manually entering them, or automatically in a case of [API integration](#).

Once you click in the search field, a list of all tags used in documents on your accounts will open. You can either choose a tag and provide a (partial) value as a search query (no need to use a wildcard as this is the default behavior); or you can just select a tag and press TAB to use it (without providing a search query value). This way all documents that have this tag defined will be matched, regardless of the value.

You can combine not only your **search keywords** but **tags**.

## Using the platform

### Auditing received envelopes and documents

You will receive an automated email notification every time you receive a new envelope into your CargoX account (you can change this setting with rules and filters).

Once you log into the CargoX Platform at <https://cargox.digital>, the view defaults to your Inbox folder where all envelopes and documents in your possession are shown. To learn more about Inbox and other folders read about the CargoX Platform workspace.

### Your envelopes and documents

Each line in the central part of the screen represents one envelope, and the main information about the envelope is already visible:

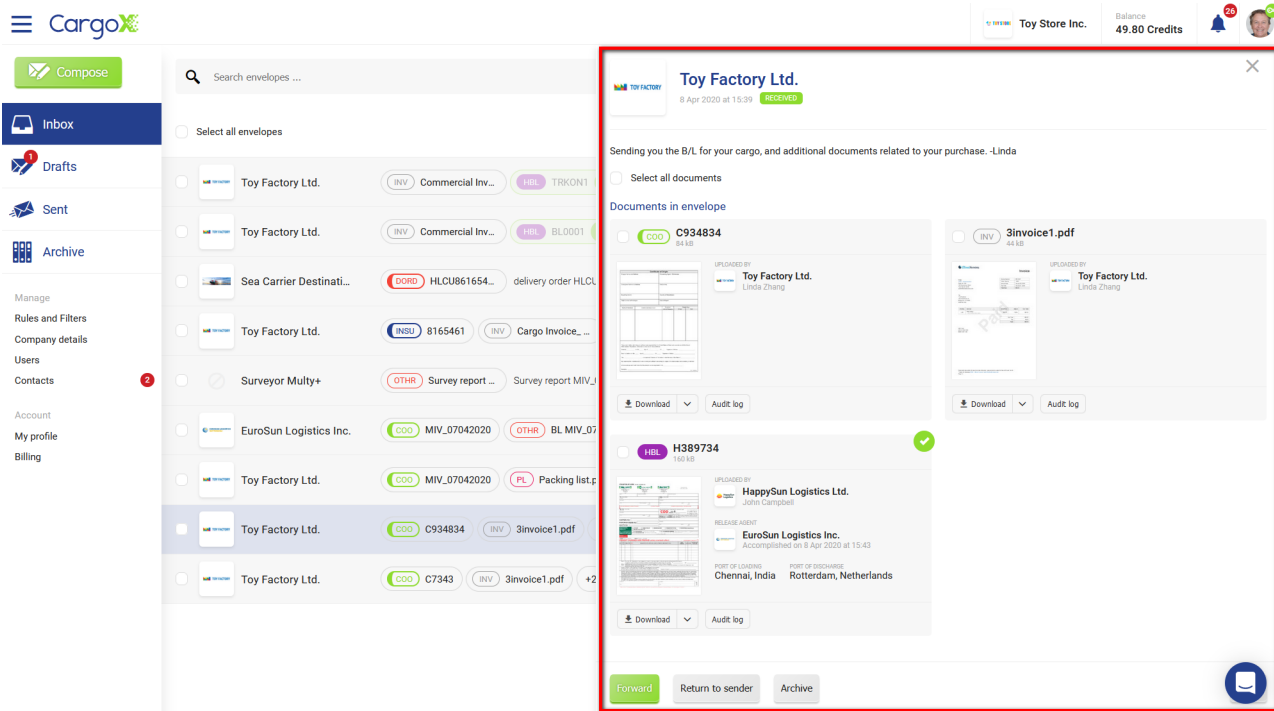
In the first column, you can see the **sender** of the envelope (and their logo if they set it), next you can see the **attached documents** and document types icons. In the highlighted example below there is one certificate of origin (COO), one invoice, and one other document (+1). To see this third document you will have to click on the envelope.

Next is the **message** from the sender (the first part of it). Towards the end of the line, the **tags** are displayed, if the sender has set them, followed by the **timestamp** when the envelope was received.

Unopened envelopes have a different background color (lighter).

### Envelope view

To open an envelope just click anywhere on the envelope header. This will open the envelope pop-up with all the details from the envelope and with all documents presented.



At the top of the expanded area you can see the **name of the sender** and the **timestamp** when the envelope was received in your inbox.

Below you will find all the documents attached in this envelope. You can see the basic information about each document, like the **document type**, **name** of the document, and the **size** of the document.

Further below are the document **preview** and information about who is the **issuer** (uploader) of the document, and who is the current **owner**. If you are looking at the envelope in your Inbox, it should be you who are in possession of these documents.

Under each document, there are also several **document action buttons**. You should always see the **Download** and **Audit log** buttons (explained below in the opening a document section), but depending on your role (per document) you can also see other buttons such as Destroy or Release cargo.

At the bottom of the page, you see action buttons related to the envelope. These depend on your role and state of the envelope. There can be the **Seal**, **Transfer**, and **Delete draft** buttons. In the **Inbox** you will usually see the **Forward** button for creating a new outbound draft envelope containing all documents from this envelope, allowing you to send it further, the **Return to sender** button, the **Archive** button for moving the envelope to the Archive folder, and the **Download all** button for downloading all documents to your computer with one click.

### Document view

To see all details about a document just click on it. This will open a pop-up with more information, including document type, name of the document, file name, and file type.

Depending on the document type you will also see who issued (uploaded) the document, who is the current owner of the document, and who is the release agent (only for B/L type of documents).

The screenshot displays the 'File details' section for a document with ID **M834333222**. The document is a PDF titled '1bill of lading 04.pdf' (1160 kB) and is a 'Master Bill of Lading'. It was uploaded by HappySun Logistics Ltd. on 12 Aug 2020 at 08:26. The current owner is Toy Store Inc., and the release agent is EuroSun Logistics Inc.

Below the file details is the 'Audit log' section, which shows a table of transactions:

Actor	Target	Action
HappySun Logistics Ltd. by John Campbell 12 Aug 2020 at 08:26		File uploaded to the system.
HappySun Logistics Ltd. by John Campbell 12 Aug 2020 at 09:10	Toy Factory Ltd. 12 Aug 2020 at 09:10	Transfer of document. <a href="#">View blockchain record</a>
Toy Factory Ltd. by Linda Zhang 30 Aug 2020 at 18:12	Toy Store Inc. 30 Aug 2020 at 18:13	Transfer of document. <a href="#">View blockchain record</a>

At the bottom of the audit log, there is a 'Download' button with a dropdown menu. The dropdown menu is open, showing three options: 'Download with watermark', 'Download without watermark', and 'Download Audit Log PDF'. A 'Close' button is also visible.

### Audit log

The audit log is a record of everything that happened with a document. It provides a complete title transfer history and authenticity information and serves as a legally valid proof of title and proof of authenticity. CargoX keeps an audit log for each and every document uploaded and transferred over the CargoX Platform.

Depending on the document type this information is either stored in the CargoX database or on the public blockchain (indicated by the active link **View blockchain record**). Link opens an independent 3rd-party website, providing insight into details of each transaction. This allows anyone to verify details independently of CargoX.

The audit log can be downloaded as a PDF document. Click the down arrow next to Download to expand the options and select **Download Audit Log PDF**.

The downloaded audit log includes the document hash code, which allows anyone holding the document to verify its authenticity by recalculating the hash and comparing it with the original one calculated at the time of document upload. The downloaded audit log also includes the QR codes and links for verifying blockchain records.

### Metadata

Under the audit log, you can find all metadata provided by the uploader. These allow you to filter, search, and sort documents much more efficiently.

### Document action buttons

At the bottom of the pop-up you can find action buttons, which depend on the document type and your role with this document.

You will always see the **Download** button, which allows you to download the current document. If you are in possession of this document at this moment (see above whether your company is listed under CURRENT OWNER) you will download the document file as it was provided by the uploader.

If you are not in possession of the document anymore (for example, if you already transferred the document to another company) then you will download a watermarked version, giving you a visual indication that you are dealing with a copy.

You can also download a watermarked copy if you are in possession - just click the down arrow next to the download button and choose **Download with watermark**. The same functionality allows you to download the audit log in PDF.

OPTIONAL: If you are an issuer of this document, and the document was returned to you, a **Destroy** button will be available to you, allowing you to start the amending process. Similarly, if you are a designated release agent for this document, a **Release cargo** button will be available, again allowing you to accomplish the document.

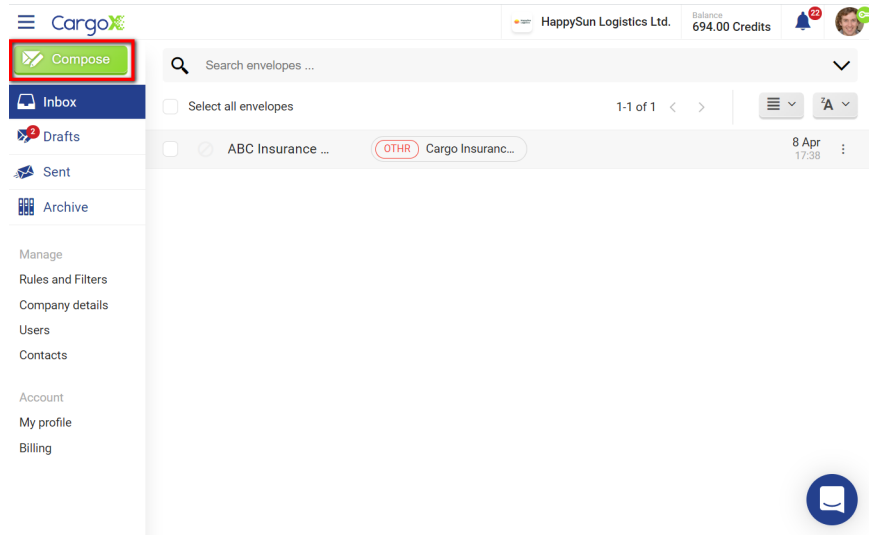
## Composing and sealing an envelope

There are just two ways to send a document on the CargoX Platform. You can select it from your computer (upload), or you can forward a document you have received from someone else and which is currently in your Inbox.

Either action creates a **new envelope draft**. You can pause your work on a draft envelope at any time and resume it later. You can find drafts in your **Draft folder**.

### Step 1: Create a new envelope

Click the green **Compose** button to create a new envelope:



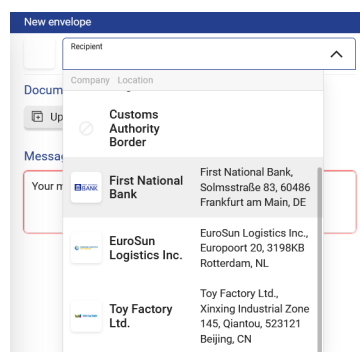
A new envelope window will appear:

 A screenshot of the 'New envelope' window. It features a 'Recipient' dropdown menu, a 'Documents in envelope' section with 'Upload new' and 'Choose from inbox' buttons, and a 'Message' text area with the placeholder 'Your message to recipient (optional)'. A 'Seal' button is located at the bottom.

### Step 2: Select the recipient

As soon as you click in the **Recipient** field, a drop-down menu will allow you to choose a company from your Contacts. You can also start typing the name to find it in your list automatically.

Remember, you can only exchange documents with the companies you are connected with on the CargoX Platform. If you want to send an envelope to a new company, you need to connect with them first.



### Step 3: Attach documents

Each envelope must contain at least one document, as you can not send empty envelopes.

You can either upload a document from your computer, or select the one you already uploaded into your CargoX Platform account. You can also mix both methods.

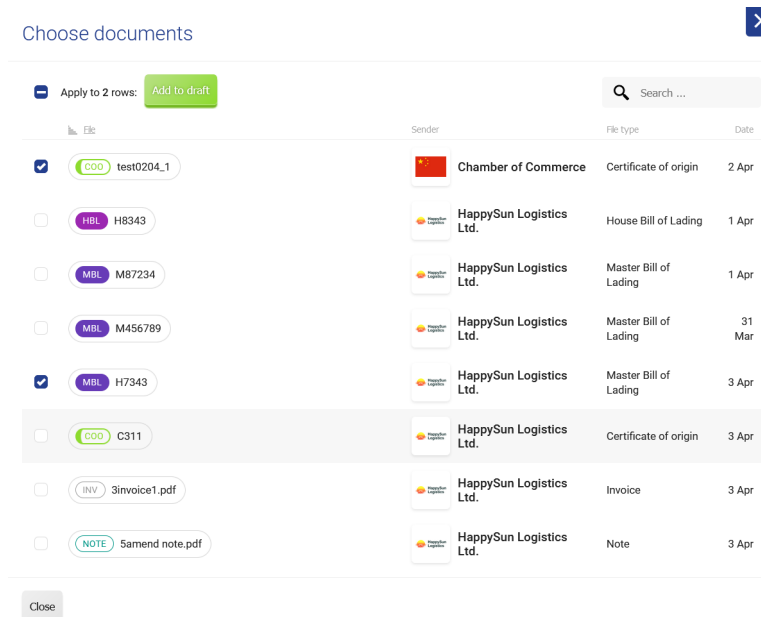
### - Uploading local documents

Use the gray **Upload new** button to upload documents from your computer. To add documents from your computer select one or multiple documents in the file browser and confirm upload. You can also drag and drop documents from your file explorer or finder app to the draft envelope in your browser. You can upload several documents at once.

### - Adding them from your inbox

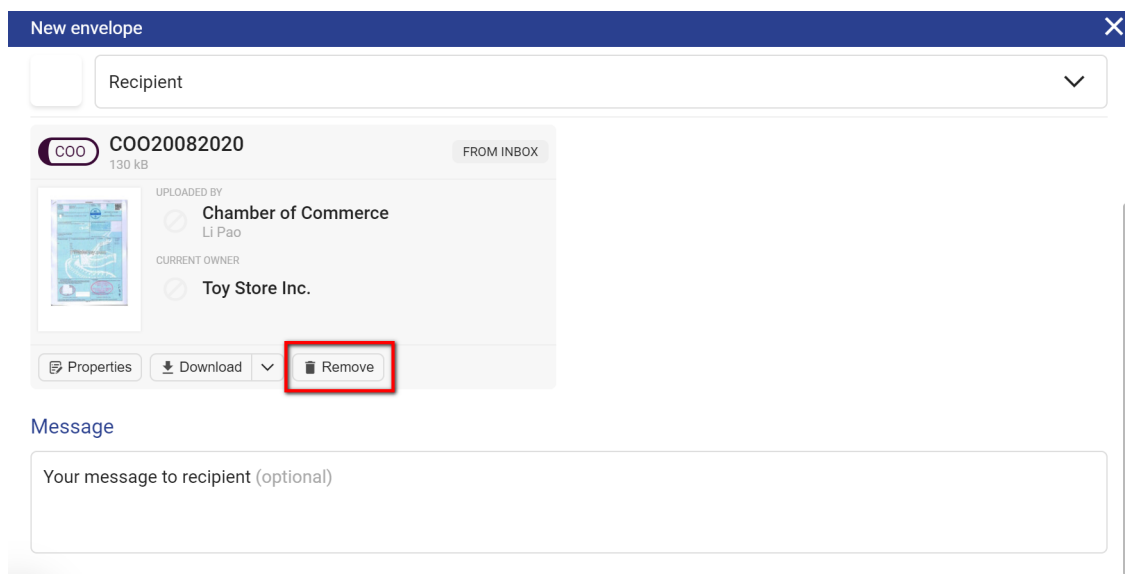
Use the gray **Choose from inbox** button to attach documents from the Inbox folder. Inbox contains all documents that are in your possession.

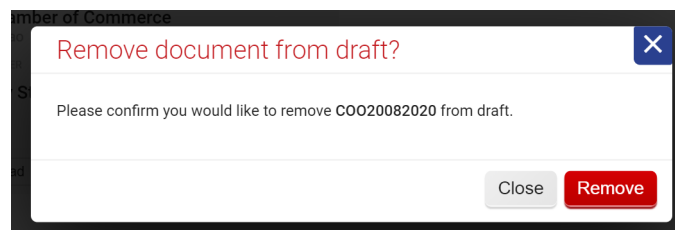
In the **Choose document** pop-up select the documents you want to attach and click the green **Add to draft** button.



### - You can also remove documents from the draft

To remove the documents, just click the gray **Remove** button next to them, and confirm removal in the dialog. This will not really delete the document from your CargoX Platform account, but it will remove it from this new draft envelope you work on.



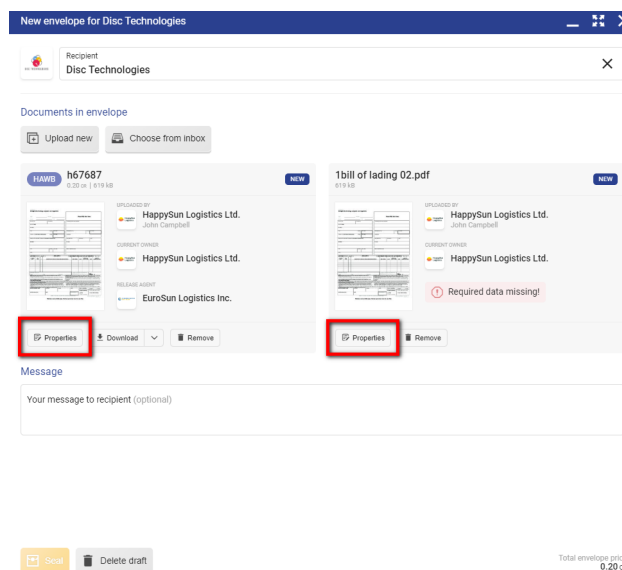


#### Step 4: Add additional information in properties

For each uploaded document you have to provide mandatory **document type** information.

Click the **Properties** button for a specific document and select its **Document type**.

Use the drop-down menu to scroll through all available document types, or start typing to filter down the possibilities.



Some document types such as bills of lading or certificates have more mandatory fields that you need to fill. These fields are clearly marked with the red **This field is required!** label.

#### Note

In the screenshot example below, the user selects the **House bill of lading** and needs to provide two mandatory values - the **B/L document number** (user copies the B/L number from the uploaded document), and the **Release agent** (user chooses release agent from a list of connected companies).

Document properties

**1bill of lading 02.pdf**

General Tags

Document type

Document type

House Bill of Lading Smart

Document properties

B/L number

Each B/L document needs to have a unique number.

This field is required!

Release agent

Release agent is the company that will have the ability to mark that cargo for this bill of lading is released.

This field is required!

Notify parties

A notification will be sent to the following list of emails when this document is transferred, archived, or manipulated in any other way.

Notify parties emails

You can enter multiple emails. You can also paste a list of emails.

File name: 1bill of lading 02.pdf

File type: PDF (619 KB)

Uploaded by: HappySun Logistics Ltd. 1 Sep 2020 at 15:21

Document type: House Bill of Lading

Blockchain support: Full

HOP limit: 50

Retention period: 10 years

Document price: 1.00 cr

Close Save

Below you can also add optional information like the **notify party**. The provided email addresses will be notified of every ownership or state change for this document.

## Note

Documents added from the Inbox already have these properties set (person who uploaded them to the CargoX did it at that time).

## Step 5: Add tags

By clicking on the **Tags** tab you can provide additional meta-information about each document. Depending on the document type there might already be several predefined tags available. You can always add your custom tags by just clicking in the field and start writing.

Tags are displayed on the Inbox screen. They provide useful information about the documents in the envelope without the need to open each envelope and document.

Tags can be used for filtering, searching, and sorting. Users can further customize their inbox look and receive notifications based on rules and filters that are based on tags.

Document properties

MIME

1bill of lading 04.pdf

General

Tags

Document tags

Tags allow you to attach any additional key/value pairs that travel with the document. You, your company, and other companies can use this data to sort, filter, and organize documents and envelopes.

Once set, the tags cannot be changed anymore, and are visible by anyone who has access to the document.

Tag name

Content / Description

My custom tag

Black

X

Something else

748439-2323

X

B/L type

Release agent

Standard Carrier Alpha Code

Booking number

Internal number

Export references

Serial number

Contract SVC

Pre carriage by

Place of receipt

Vessel name

Voyage number

Port of loading

1bill of lading 04.pdf

FILE NAME

1bill of lading 04.pdf

FILE TYPE

PDF

(160 kb)

UPLOADED BY

Toy Factory Ltd.

3 Apr 2025 at 07:22

RELEASE AGENT

HappySun Logistics Ltd.

DOCUMENT TYPE

MIME Master Bill of Lading

CHAIN

Headerum

HDP LIMIT

50

### Step 6: Verify the document information in the right sidebar

In the colored sidebar on the right you can see the live preview of the document and its main properties such as file name, file type, document type, size. Even more importantly, you can see the price (in units) and limits of the chosen document type - for example, some B/L types allow only a limited number of exchange of ownership transfers (hops).

## Step 7: Save the document changes

Once you are satisfied with the properties of the document, click the **green Save** button to return to the envelope view.

You can repeat the process of providing properties for other uploaded documents, or upload or add another document.

### Step 8: Verify the price to send the envelope

In the bottom right corner of the envelope, you can see the price (in units) to transfer the envelope. Per CargoX pricing policy you only pay for the transfer if you are issuing (uploading) document to the blockchain. If you are only forwarding a received document, you do not need units, as this action is always free of charge (the document's blockchain fee has been paid for by the original sender).

[illegible]

**Step 9: Add an optional message**

Just like with an email, you can add an optional text message to the envelope. The message will only be visible to the recipient. Write it into the provided field. Users tend to use the message field to communicate instructions to the recipient.

**Step 10: Seal the envelope**

Once you are satisfied with the envelope, click the orange **Seal** button to prepare it for transfer.

**Note**

On the CargoX Platform, sealing the envelope creates a digital fingerprint (hash) of all documents, encrypts documents, and finally moves them to the decentralized storage (IPFS). This corresponds to putting the paper documents into the courier's envelope when dealing with physical documents.

When you seal the envelope, it remains in your possession, but this unlocks a new action - the possibility to transfer it.

When an envelope is sealed, you can no longer add or remove documents or make any other changes. If you need, you can unseal the envelope and change the recipient, documents, and their properties, or even the message. After that, you can seal the envelope again. You can also delete the draft envelope if you no longer need it.

**Note**

The **Seal** button is only active (orange), if all the attached documents have their mandatory fields filled, and if you have selected the recipient.

**Transferring the envelope****Warning**

Sending the envelope is an irreversible process. Once you can send it, it is impossible to undo the process, as the ownership information passes to the recipient via the immutable (unchangeable) blockchain transaction.

**PREREQUISITES:**

- Your blockchain key must be unlocked
- Your account must have proper permissions to be allowed to transfer envelopes and manage documents: "Transfer documents and create envelopes" or "document manager"
- Have enough units in your company account to pay for the transfer. The price (U) of the transfer can be seen in the lower right corner of the sealed envelope. If you are forwarding received document(s), you do not need units, as this action is always free of charge.

You can check both in the Privacy and Security section of My profile.

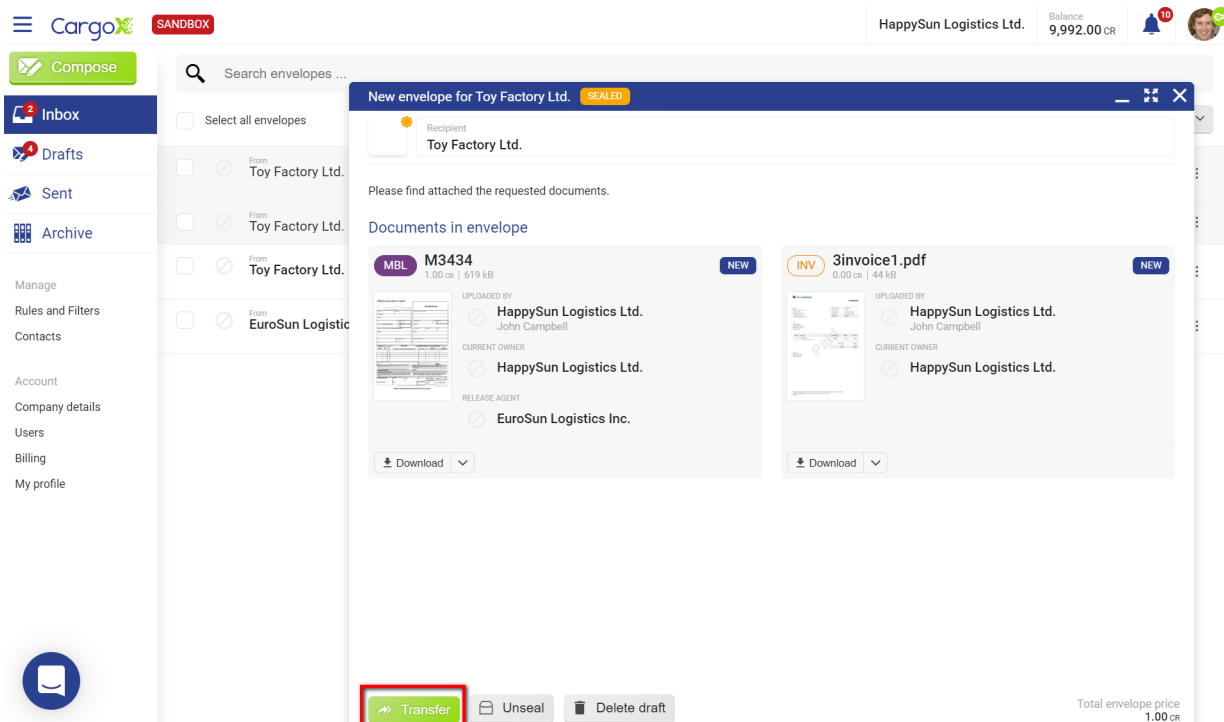
**Step 1: Verify that the envelope is sealed**

Only an envelope that is sealed can be transferred. If you still see the orange **Seal** button, the envelope is not yet sealed. To verify if the envelope is sealed, look at the available action buttons. If you see the green **Transfer** button you can continue.

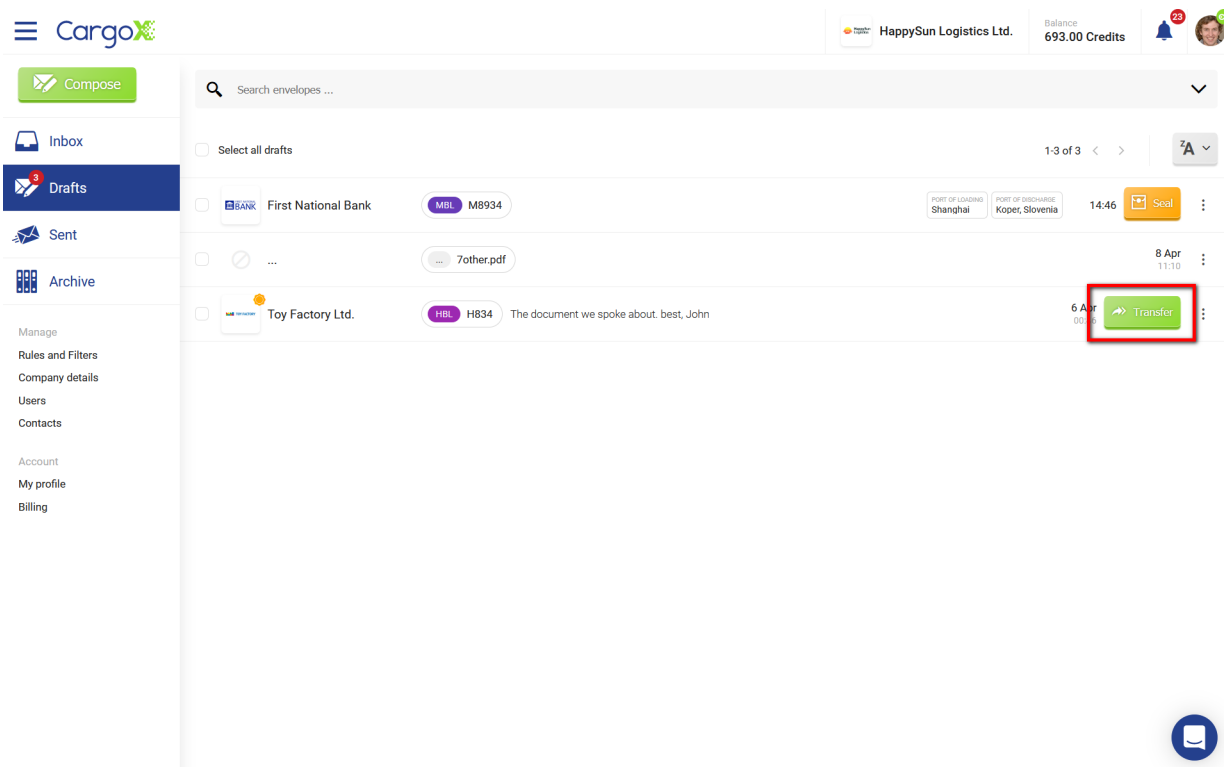
**Step 2: Click the Transfer button**

To initiate the transfer click the green **Transfer** button.

You can do that while viewing the envelope - the green button is at the bottom left side of the envelope pop-up:



You can also transfer the envelope from the envelope listing in your **Drafts** folder. Just click the green **Transfer** button at the end of the line:



## Note

If you do not see the Transfer button or if your blockchain key is locked (the key icon next to the user's image is red), check the prerequisites at the beginning of this page to resolve.

### Step 3: Double-check all data

The transfer process always starts with an overview. Please carefully review which documents you are about to transfer, and especially to whom, as the transfer is irreversible! You can also review the message you attached to the envelope.

You need to decide who will pay for the transfer and review how much the transfer will cost (in units). Normally the issuer (uploader) of the document pays, but alternatively, collect payment is possible where the first recipient will cover the costs.

When you are ready to continue click the green **Next** button.

**Send documents**

Review Sign & Transfer

Transfer **1 envelope(s)** containing **2 document(s)**.

You are about to transfer **1 envelope(s)** containing **2 document(s)**. Double-check the document(s) included in the envelope(s) and verify that you have selected the right recipient(s). Click Next to continue.

Envelope recipient	Documents in envelope	
<input checked="" type="radio"/> Toy Factory Ltd.	<div>MBL M3434</div> <div>INV 3invoice1.pdf</div>	1.00 CR

Please find attached the requested documents.

Who will pay for the transfer? You will pay: **1.00 CR**

☒ I will pay

☐ Recipient will pay (pay to collect)

Close Next

### Step 4: Digitally sign the transfer

To confirm the transfer, you must authenticate and digitally sign it with your blockchain key. Select the checkbox to confirm you understand the transfer can not be reverted, and click the green **Sign and Transfer** button to continue.

#### Note

If you have two or more blockchain keys linked to your CargoX Platform account, you can choose which one you wish to use. If the chosen key is still locked, you will have to unlock it in order to be able to sign and transfer an envelope.

**Send documents**

Review Choose blockchain key Unlock blockchain key Sign & Transfer

Sign and Transfer the envelope(s)

Your blockchain key is unlocked and it will be used to sign this action.

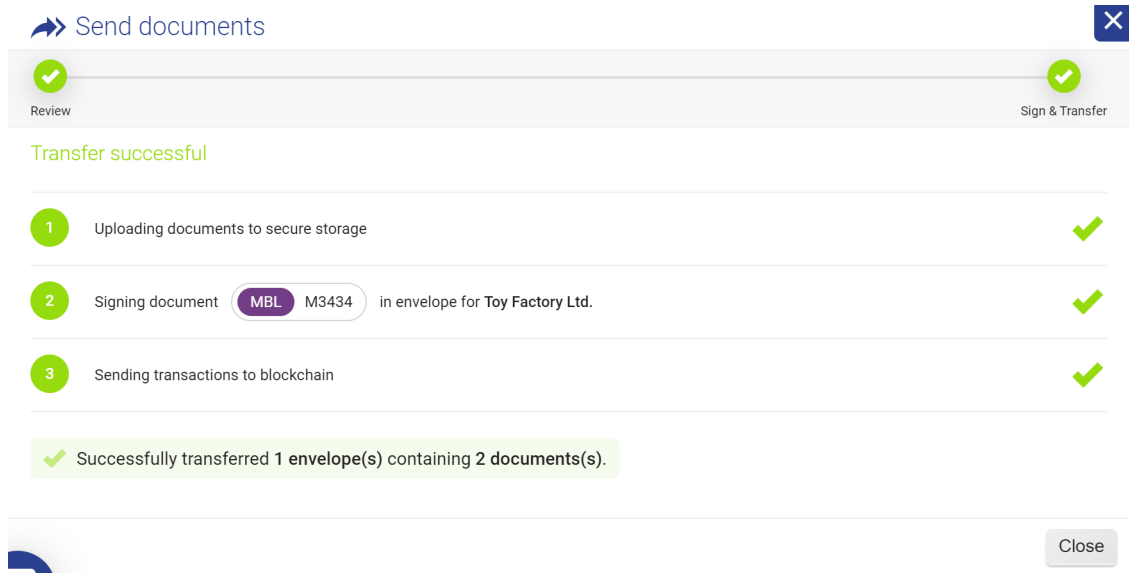
Click the Sign and Transfer button to initiate the action.

☒ understand that once I sign this transaction, the transfer of documents is final and cannot be reverted.

Back Close Sign and Transfer

### Step 5: Transfer is underway

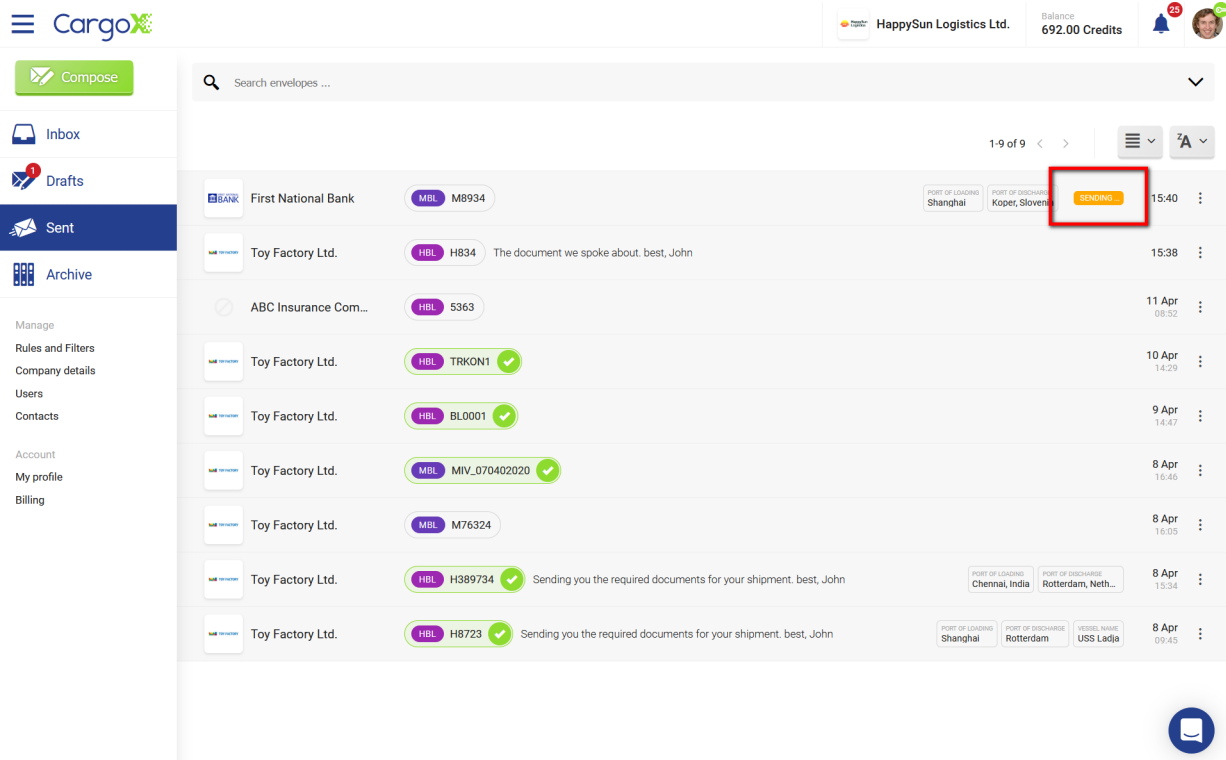
After you confirm the transfer, the CargoX Platform will generate the required blockchain transactions and send them to the blockchain. A few seconds later the summary will be shown. You can now close the pop-up by pressing **Close** or **[X]** in the upper right corner.



### Step 6: Status of the transfer

To verify the status of the transaction, click on the **Sent** folder.

You can see the status of envelopes that are in transit - they have the orange **SENDING** tag present as seen below.



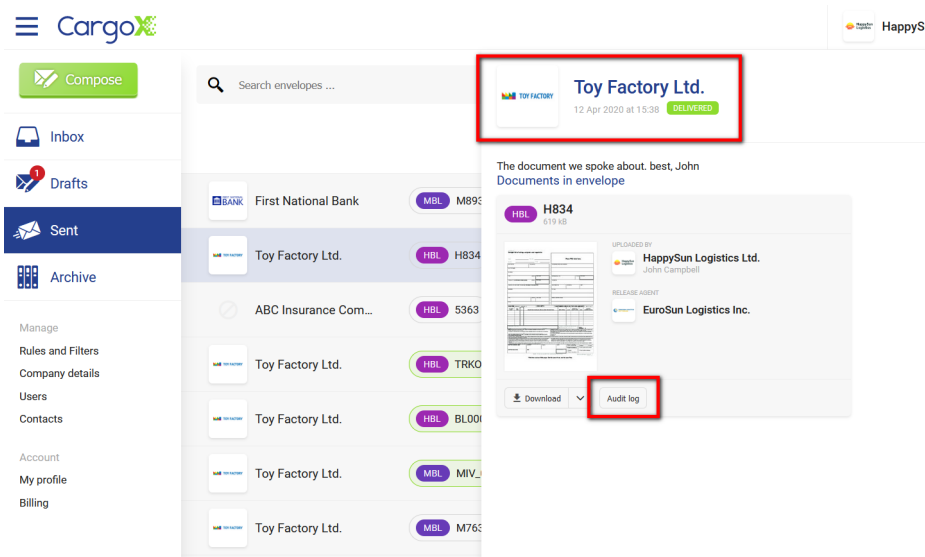
The speed of the actual transfer depends on the throughput of the blockchain network at a given time. Transfers normally take between a few seconds and a few minutes, but they can also take more time. You can click on the orange **SENDING** tag for more details.

Once the orange **SENDING** tag disappears, the transfer is completed, and the ownership of the documents in the envelope has passed from you to the recipient.

### Step 7: Transfer is complete - check the status and audit log

Click on the sent envelope. As shown in the screenshot below, you can see that the envelope was delivered (it has a green tag). The timestamp describes when it was delivered into the possession of the recipient.

The CargoX Platform provides superb visibility with a per-document transaction log. Each document ownership or state change is written to the audit log, which you can see at any time by clicking on the **Audit log** button (and for document types that have full blockchain support - also by confirming on the blockchain).



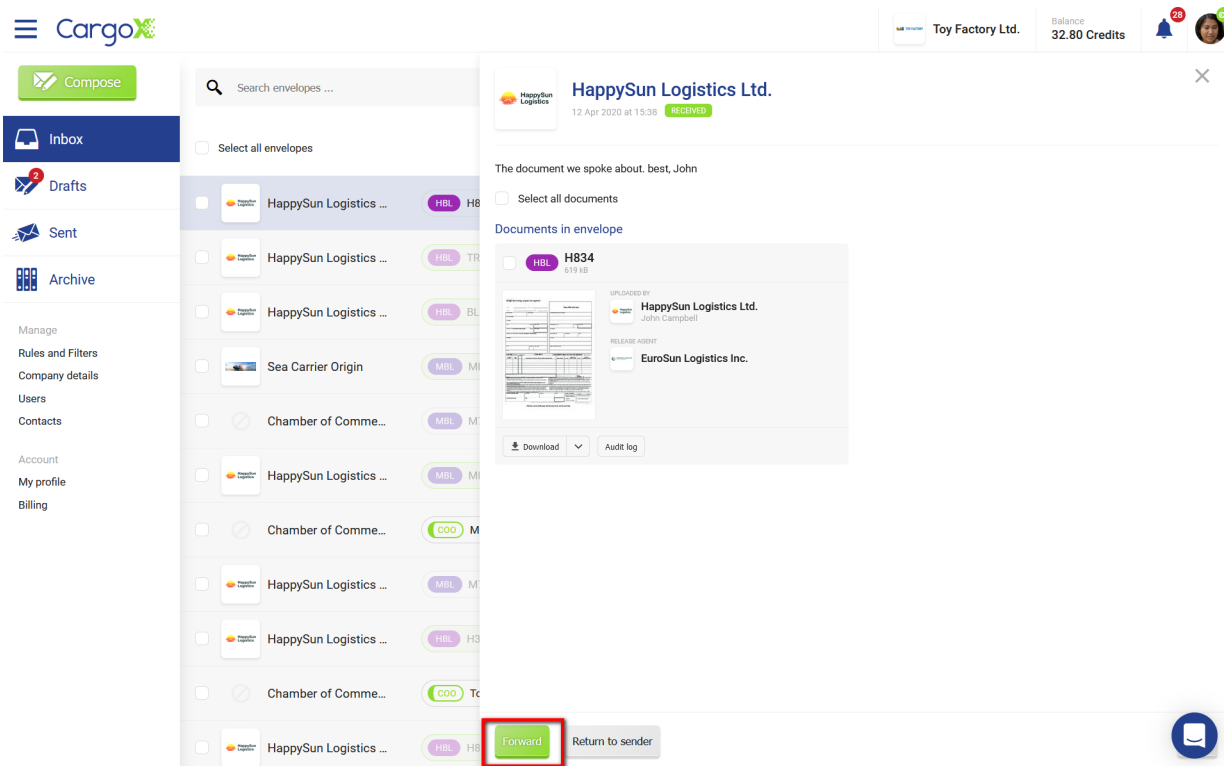
### Forward the received documents

There are two ways to send a document on the CargoX Platform.

Forward is the simplest one, as it allows you to just forward one or more documents received on the CargoX Platform to the next recipient.

#### Step 1: The magic forward button

In your **Inbox** click on the envelope that contains the documents you wish to forward. To forward all documents in that envelope, click the green **Forward** button at the bottom.



#### Step 2: The new draft envelope

This will immediately create a new draft envelope, and attach to it **all the documents contained in the selected envelope**.

You now have the flexibility to either **remove** some of the documents in the draft or **add** more of them.

### Step 3: Continue as with a new envelope

The rest of the process is identical to the composing of the new envelope process, therefore please follow instructions for creating and sealing a new envelope.

### Step 4: Quick summary

After you add all the documents, select the recipient from the list of companies you are connected with and write an optional message.

Once you have chosen the recipient, added the document(s), and wrote an optional message, click the orange **Seal** button to prepare the envelope for sending.

**IT IS SIMPLE:** When using **forward** you do not need to fill any document properties, as those were already provided by the original issuer (uploader) of the documents.

**IT IS FREE:** There are no costs associated with forwarding the documents, as they were already paid for by the issuer (or the first recipient). You can read more about the CargoX pricing policy.

**NEED MORE HELP?** Visit the compose and seal a new envelope page for a step-by-step explanation of all elements of the compose screen.

### Collect payment envelope

As explained in Who will pay for the transfer? the vast majority of documents sent on the CargoX Platform are sent in a way where the issuer is covering the cost of the blockchain document transfer. But due to the flexibility of the CargoX Platform another use case - a collect payment - is also possible.

Collect payment allows the first recipient to cover the cost of blockchain document transfer over the CargoX Platform. The parties agree on the collect payment mostly for faster and easier onboarding of the issuer (since there are no costs for them, the internal procuring process is faster).

### Sending the envelope as a collect payment

#### Note

**Collect payment is only available when sending standard envelope. This feature is not available for the Egyptian ACI filing.**

While the procedure to create documents and envelope is the same when using a collect payment method of transfer, the only difference comes during the **Step 3** of transferring of the envelope, where the sender needs to select the **Recipient will pay (pay to collect)** option.

This will immediately update the total cost for the sender, as indicated in the example and two screenshots:

The screenshot shows a web interface for sending documents. At the top, there's a header 'Send documents' with a close button. Below it is a progress bar. The main content area shows 'Transfer 1 envelope(s) containing 1 document(s).' followed by a warning: 'You are about to transfer 1 envelope(s) containing 1 document(s). Double-check the document(s) included in the envelope(s) and verify that you have selected the right recipient(s). Click Next to continue.' Below this, there are two sections: 'Envelope recipient' showing 'Disc Technologies' and 'Documents in envelope' showing 'HAWB h67687' with a cost of '0.20 CR'. The 'Who will pay for the transfer?' section has two radio buttons: 'I will pay' (selected) and 'Recipient will pay (pay to collect)'. To the right, it says 'You will pay: 0.20 CR'. At the bottom, there are 'Close' and 'Next' buttons.

The cost of 0.2 units is now assigned to the recipient, while there is zero cost for the sender.

Send documents

Transfer 1 envelope(s) containing 1 document(s).

You are about to transfer 1 envelope(s) containing 1 document(s). Double-check the document(s) included in the envelope(s) and verify that you have selected the right recipient(s). Click Next to continue.

Envelope recipient	Documents in envelope	
Disc Technologies	HAWB h67687	0.20 CR

Who will pay for the transfer?

☐ I will pay

☒ Recipient will pay (pay to collect)

You will pay: 0.00 CR  
Disc Technologies will pay: 0.20 CR

Close Next

The sender still has to digitally sign the transfer with his private blockchain key, before the transaction can be initiated. As this transaction (and transfer of ownership/title) will only happen if the recipient accepts the costs - the actual blockchain transaction is delayed until the moment when the recipient accepts the incoming envelope.

Send documents

Sign and Transfer the envelope(s)

Your blockchain key is unlocked and it will be used to sign this action.

Click the Sign and Transfer button to initiate the action.

☐ I understand that once I sign this transaction, the recipient will need to accept the envelope before the transfer is recorded on the blockchain. The recipient may also reject the envelope. If this happens, the envelope will be returned to you and no blockchain transaction will be recorded.

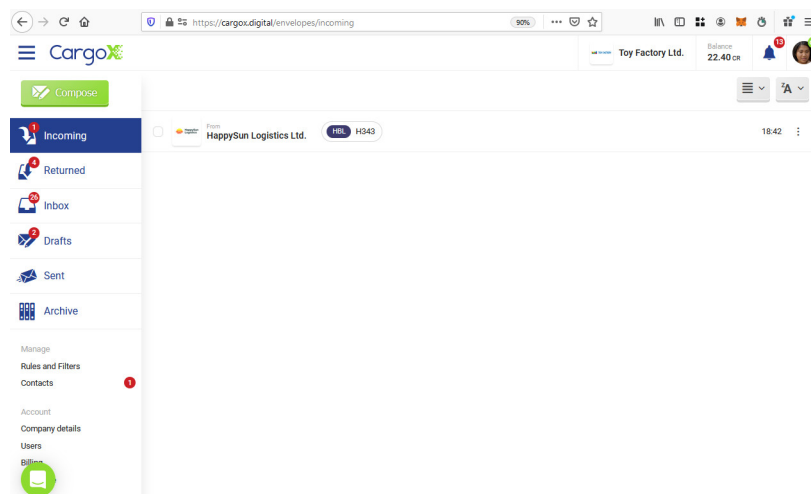
Back Close Sign and Transfer

After the sending process completes, the sender can find the "sent" envelope in the **Sent** folder, and clicking on it will show the status (pending acceptance), which will only change after the recipient reacts to it.

If the recipient accepts the costs, the status will change to Sent (and will show the exact timestamp of blockchain transfer); and if the recipient rejects the envelope, it will be returned to the sender's **Returned** folder, from where the sender can send it again, or delete it.

### Receiving the envelope as a collect payment

The recipient will get an email notification about the incoming envelope. Once the recipient logs into the CargoX Platform, a new folder titled **Incoming** will appear on the left side.



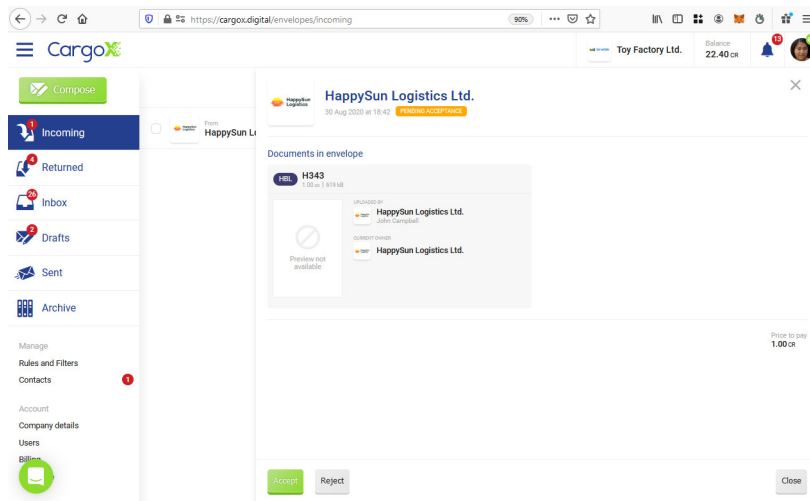
If the user clicks on the envelope in this folder, more details will be shown.

As ownership of this envelope and its documents are still with the sender, only limited details - such as the name of the document and document type will be shown.

Live preview or thumbnail is not available for the pay-to-collect incoming documents.

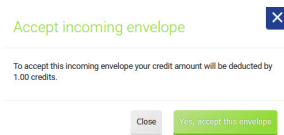
On the right side, the total cost for accepting this envelope is presented.

At the bottom of the screen the user has two buttons - he can either **accept** or **reject** the incoming envelope and related costs.

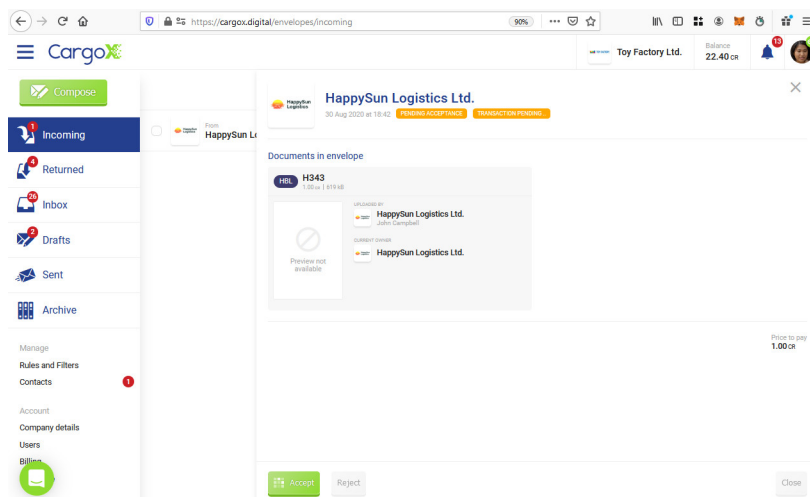


If the user **rejects** the incoming envelope, the sender is notified about it, and that is the end of the process.

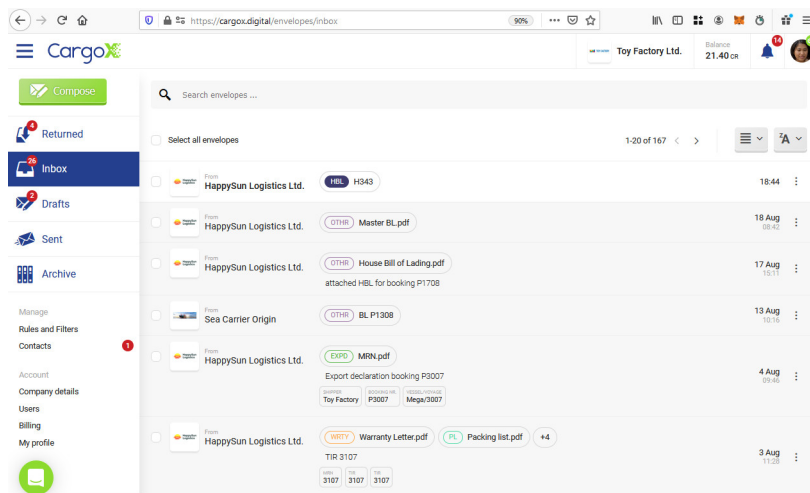
If the user accepts the incoming envelope, a summary pop-up is displayed, again showing the total cost related to accepting this envelope. Once the user confirms the acceptance by clicking the green **Yes, accept this envelope**, the blockchain transaction is created and the transfer of ownership starts.



Since it might take between a few seconds and a few minutes for the blockchain transaction to complete, during this time the recipient sees the status of the envelope in the **Incoming** folder with an orange **transaction pending** status indicator.



After the blockchain transaction completes, the envelope is moved from the **Incoming** to the **Inbox** folder. Here, the recipient can normally open it and see all the details and documents in the envelope.



## Unsealing the envelope

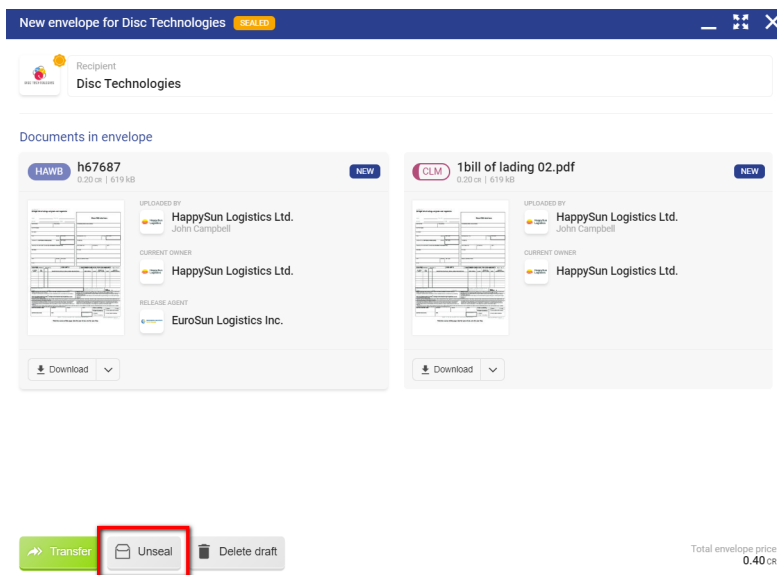
### Note

If you have already completed the sealing process of your new envelope, you can no longer add or remove documents into it, or make any other changes to the envelope.

### Step 1: Unseal the envelope

If you wish to make changes, you have to first unseal the envelope.

To do that just click the gray **Unseal** button at the bottom of the envelope pop-up.



### Step 2: Make the change

Now you can edit the envelope again, add or remove documents, change properties and document type, select a different recipient, and edit the text message.

### Step 3: Continue with...

You can leave your envelope unsealed in the system and make changes later.

Once you make all the necessary changes and wish to continue towards transferring the envelope, first seal it again by clicking the **Seal** button. There are no limits on how many times you can seal and unseal the envelope.

You can leave the sealed envelope in your **Drafts** folder to transfer it later, or you can continue with the transfer.

Alternatively, you can also delete your draft envelope if you no longer need it.

## Deleting a draft envelope

You can delete any envelope - sealed or unsealed - from the **Drafts** folder.

### Note

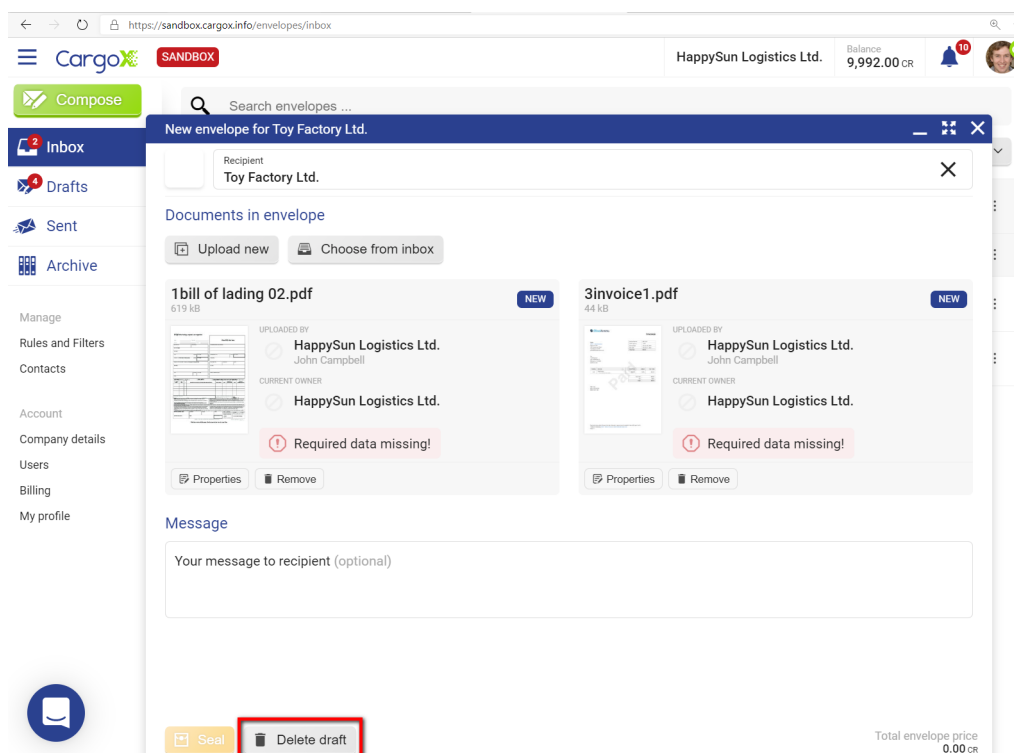
If the draft envelope includes a (forwarded) document of title from your inbox, the ownership of that document will return back to the envelope in the inbox if the draft is deleted (and you can then forward it again).

### Step 1: Delete the draft

Click on the **Drafts** folder, and open the envelope you wish to delete.

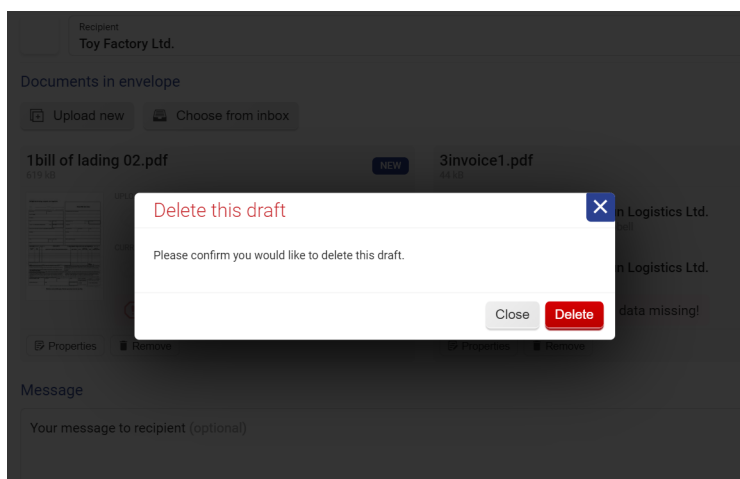
Deleting a draft envelope is irreversible, so make sure you are deleting the right envelope.

Click the gray **Delete draft** button at the bottom.



### Step 2: Confirm deletion

Confirm your action in the pop-up by again clicking on the red Delete button.



## Archiving the envelopes to clear my workspace

To clean up your **Inbox**, **Sent**, or **Returned** folders, you can use the **Archive** button.

Similar to email, envelopes you send will be stored in the Sent folder, but the CargoX Platform will not automatically move envelopes you receive - either in Inbox or in Returned folders.

Instead, it is up to you to decide when you are done with them. The idea is to keep the envelope in the Inbox as long as the document there is a part of your work process or as a reminder that something needs to be done related to it.

Even after the document of title in the received envelope has been forwarded to the next party, the original envelope will still show in your Inbox, although it will no longer hold the title (ownership) of that document. This is indicated by the change of color of the document type icon (it will be grayed out).

You can not archive an envelope that contains an active document of title (one with full blockchain support). This means that the document needs to be accomplished first (either cargo needs to be released or the document destroyed).

To archive, the envelope, open the envelope and click the gray **Archive** button below.

There is no limit on the number of envelopes and documents you can have in your CargoX account or in the archive. CargoX offers 10 years of digital storage of your documents.

The screenshot displays the CargoX platform interface. On the left is a sidebar with navigation options: Compose, Inbox (selected), Drafts, Sent, Archive, Manage, Rules and Filters, Contacts, Account, Company details, Users, Billing, and My profile. The main area shows a list of envelopes in the 'Inbox'. The selected envelope is from 'Customs Authority Origin' with a document type icon labeled 'EXPD'. Below the list, the details of the 'Customs Authority Origin' envelope are shown, including the export declaration for 'Toy Factory, booking P3007'. The 'Documents in envelope' section shows a document titled 'MRN.pdf' (168 KB) uploaded by 'Customs Authority Origin' (Peter Kern) and currently owned by the 'Shipper'. At the bottom of the envelope details, there are buttons for 'Forward', 'Return to sender', 'Archive' (highlighted with a red box), 'Download all', and 'Close'.

## Releasing the cargo

### Warning

Releasing the cargo is an irreversible process. This means that once the cargo is released, you can not undo the process. Once the cargo is released the document is marked as **accomplished**. After accomplishment, no further changes to the document are possible (including state or ownership change).

### PREREQUISITES:

- Your blockchain key must be unlocked
- Your account must have proper permissions to be allowed to accomplish documents.

You can check both in the Privacy and Security section of My profile.

## Note

The **Release cargo** action is only available to the party that has been designated as the release agent for a particular document/shipment.

Accomplishing documents marks completion of the document's journey. Apart from the rarely used delete a document feature that is part of the amending process and used by issuers, the most frequently used accomplishing action is the release cargo process.

After the ship arrives at your port, you notify the consignee to provide the original B/L document as proof that cargo can be released into their possession. Since the issuer issued the B/L on the CargoX Platform in a digital form, the only valid way for you to receive that B/L is over the CargoX Platform.

Since only the title-holder can transfer a B/L document, this proves beyond any shadow of the doubt that whoever sent you the B/L document is indeed the rightful owner of this document of title. You can be sure there are no reasons not to release the cargo either into the hands of this party or following their instructions.

After you receive the B/L document via the CargoX Platform from the consignee you will receive an email notification from the CargoX Platform, and on your next login to the platform, the envelope/document will show in your Inbox.

### Step 1: Open the envelope with the B/L document, inspect it

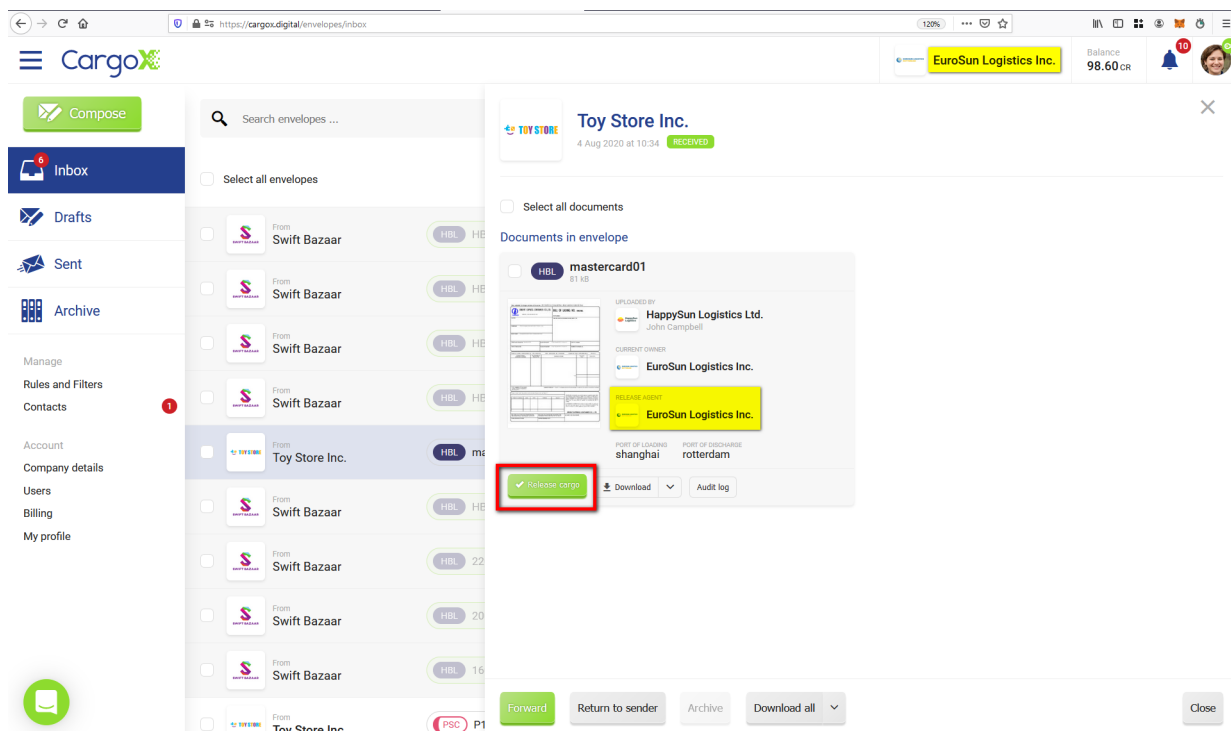
Click on the envelope with the B/L document you wish to release cargo for and open the document. Inspect the audit log to verify the authenticity of the document and the issuer. Verify all other details in the received documents and read the message that came along with the envelope as it might include specific instructions on how to handle the release of this cargo.

If you are a designated release agent for a B/L document, you will see a green **Release cargo** button available for the specific document.

### Step 2: Click the Release cargo button

All transactions on the blockchain are irreversible and this also includes the release of the cargo. Please double-check that you are working on the correct B/L document before continuing.

Once you are ready to release the cargo, indicate this new status on the blockchain by pressing the **Release cargo** button.



### Step 3: Double-check all data

The release cargo process always starts with an overview. Please carefully review the information as the release cargo process is irreversible! You can also review the instructions message if you received one with the envelope.

Once ready to continue click the green **Next** button.

### Step 4: Digitally sign the release of the cargo

To confirm the release cargo action, you must authenticate and digitally sign it with your blockchain key. Select the checkbox if you understand and agree that the action can not be reverted, then click the green **Sign and Release** button to continue.

#### Note

If you have two or more blockchain keys linked to your CargoX Platform account, you first have to choose which key you wish to use. If your chosen key is locked, you first have to unlock it.

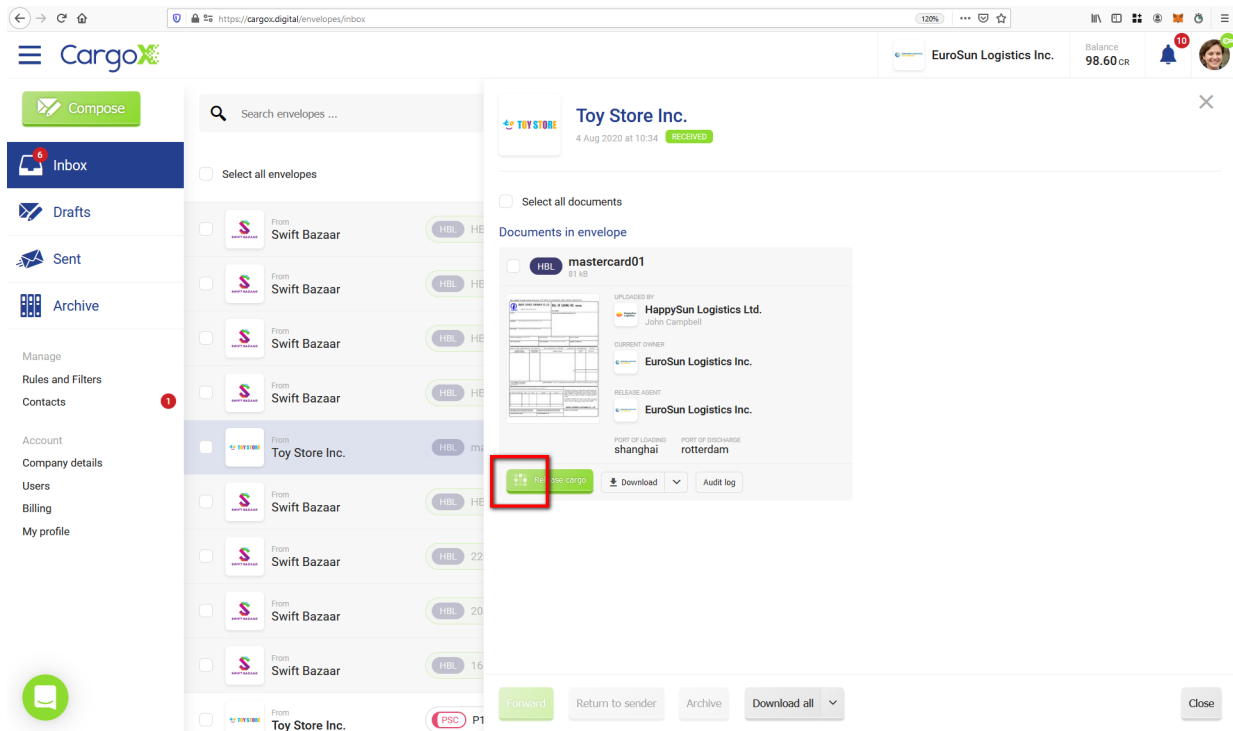
### Step 5: Cargo release is underway

After you confirm the release action, the CargoX Platform will generate the required blockchain transactions and send them to the blockchain. A few seconds later the summary will be shown. You can now close the **Release cargo** pop-up.

### Step 6: Status of the cargo release

As you wait for the blockchain transaction releasing the cargo to complete you can observe the current status in the envelope view.

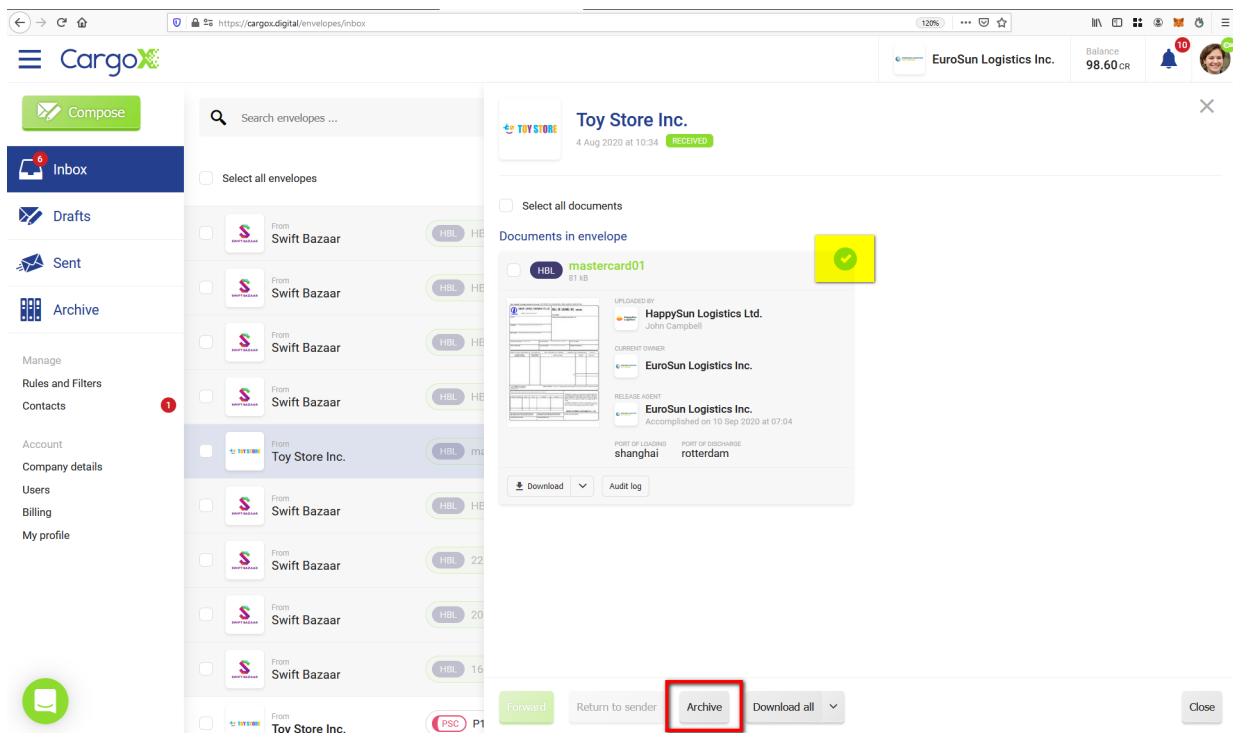
The animated white cubes icon on the green **Release cargo** button indicates that cargo release is pending. No other actions will be available until the action completes.



The speed of the actual cargo release depends on the state of the blockchain network and can normally take between a few seconds and a few minutes.

Once the animation stops and a green check-mark appears in the upper right corner of the document tile, the cargo release action is completed.

The gray **Archive** button also becomes active at the bottom.



**Step 7: Cargo release is complete - check the status and audit log**

The CargoX Platform provides superb visibility with a per-document audit log. Each document ownership or state change is written to the audit log, which you can see at any time by clicking on the **Audit log** button. You can also download the audit log as a PDF.

Completed B/L documents will remain in your Inbox, but you will notice the document type icon to be grayed-out, indicating that the envelope no longer holds the title of the document. Once you are done with a workflow around a particular document, you can easily remove it from your Inbox by clicking the **Archive** button which will move the document to the Archive folder. CargoX provides free digital storage of documents for a period of 10 years.

### ***How to amend the document once the envelope is already sent?***

Once a document, such as a bill of lading has been created on the platform, the issuer can still delete or change it.

But once an envelope with this document has been transferred away from the Issuer and it has been transferred into someone else's possession, it can not be changed by anyone.

If parties later discover an error in the document, the procedure on how to amend it is as follows.

The document must be transferred (returned) to the issuer, ideally, along with an additional document or note requesting the change.

Based on this information the Issuer can now (any only now that they have the document they have issued back in their possession), destroy this document, and issue a new (corrected) one in its place. When performing this, the use of the same document number is allowed by the CargoX Platform - but please check with your operations how to proceed about that.

### **Note**

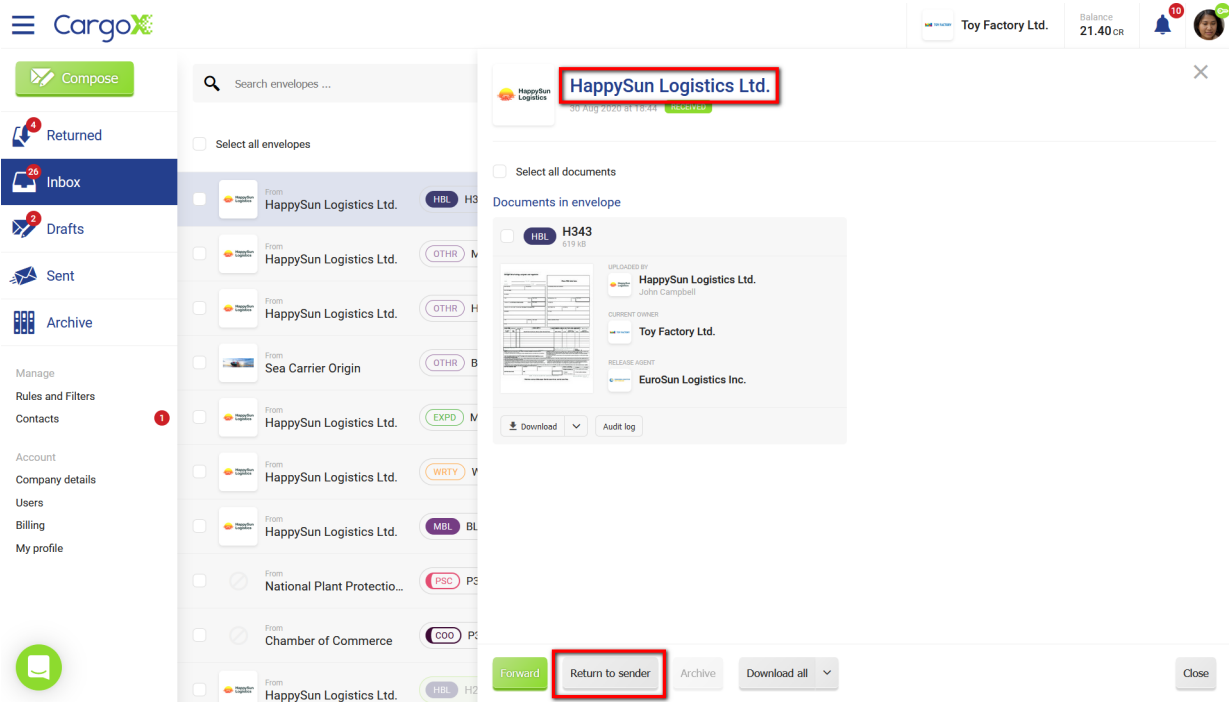
It is mandatory for the issuer to destroy the existing document prior to issuing a new one with the same number as the blockchain is immutable, and documents already tracked on the blockchain are unchangeable.

### ***Return envelope to sender***

If you find a problem with one of the received documents - especially if these documents have full blockchain support like a bill of lading - the only way to amend these is to return them to the issuer through the CargoX Platform.

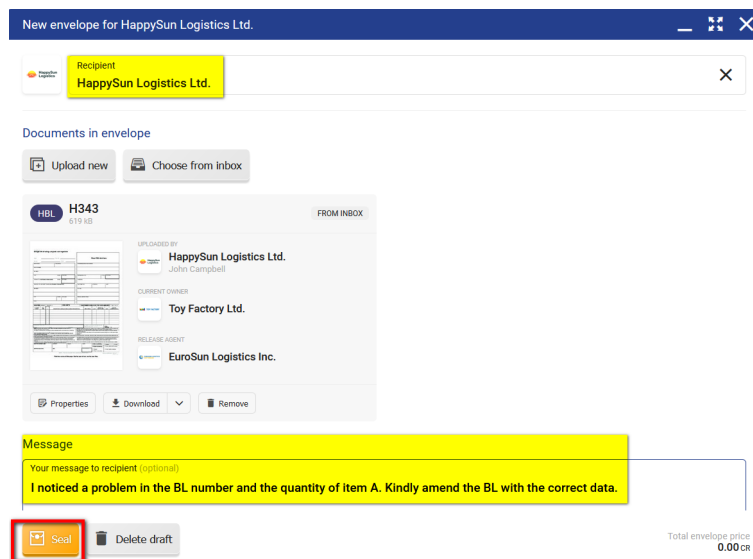
After you **communicate with the Issuer** - or with the party that sent you the document - you might want to return the document to the sender, effectively rejecting it.

If you need to return the envelope to the sender, you can use the simplified way, of just pressing the **Return to sender** button. This will immediately create a new draft envelope and set the receiver to the party that sent you the envelope. The envelope will contain all documents from the received envelope.



You still have the flexibility to **remove** some of the documents. Be careful what you send, as you are passing the ownership title of all included documents back to the original sender. You can optionally also **add** other documents from your computer, or from your Inbox like you would when using the compose new envelope.

It might also be a good idea to **add a message** below - explaining why you are returning the envelope and providing further instructions to the recipient.



Alternatively, you can just select the documents you wish to send, click the forward button and provide the recipient - same as when you are forwarding the envelope.

Once you are satisfied with the recipient, documents and message, click the orange **Seal** button to prepare an envelope for sending.

## Warning

Using the **Return to sender** will address the envelope to the party that sent you the envelope. This might not be the same party as the original issuer of the document. Inspect information about the issuer of the document and double-check the recipient before sending the envelope as all transfers on the blockchain are final and irreversible.

## Returned envelopes

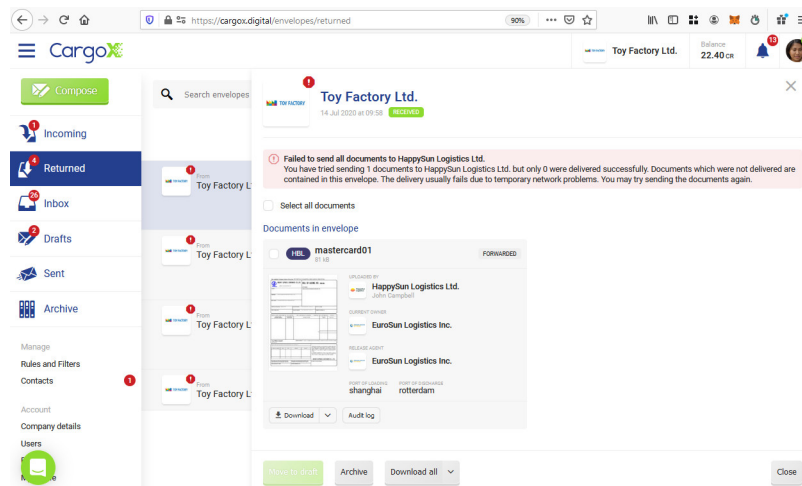
If there is a problem while transferring an envelope (documents) to the recipient, nothing is ever lost. If the blockchain transaction transferring the title of the document fails, it means that you are still the owner of the document.

This happens only when the underlying blockchain network is experiencing abnormal behavior which is very rare. In an event of a failed delivery, the affected documents will be returned to you.

A new folder titled **Returned** will appear, along with a number indicating how many envelopes it contains.

In this folder, you will find all the envelopes (and documents) that were not transferred to the recipient. You can open them and try to transfer them again. We suggest that you wait a few minutes before you do.

After you have successfully transferred the documents, you can archive the envelopes in the Returned folder.



### Note

If the document transfer fails you will not be charged. Only successful transfers are charged as per our price list (if you are an issuer).

## Destroying a document

### Warning

Destroying a document is an irreversible process. This means that once the document is destroyed, you can not undo the process. Once the document is destroyed it is marked as accomplished. After accomplishment, no further changes to the document are possible (including state or ownership change).

### PREREQUISITES:

- Your blockchain key must be unlocked
- Your account must have proper permissions to be allowed to accomplish documents.

You can check both in the Privacy and Security section of My profile.

### Note

Destroy a document action is only available to the issuer of the document.

Accomplishing documents marks completion of the document's journey. The **Delete document** feature is the only other accomplishing process apart from the very frequently used release cargo action.

If after the document has been issued and transferred on the blockchain any of the parties discovers a problem with the document they can request the amendment from the issuer.

The shipper or another party that wants an amendment should contact the issuer first, before the actual B/L is transferred back to the Issuer/rejected. After both parties agree on the best way forward - and who will cover the cost of issuing a replacement B/L - the amendment procedure should be done as follows.

The issuer can only amend the document if the original document is returned into their possession on the CargoX Platform. Before creating a new and corrected document under the same B/L number, the issuer needs to destroy the current document.

### Step 1: Obtain the B/L document

To issue a replacement B/L you should have the original B/L in your possession to prevent duplicate B/L documents for the same shipment.

Instruct the current owner of the B/L to transfer the document back into your possession (you must be connected via contacts in order for this to be possible). If you sent this document to them directly, they can use the Return to sender feature.

### Step 2: Open the envelope with the B/L document, inspect it

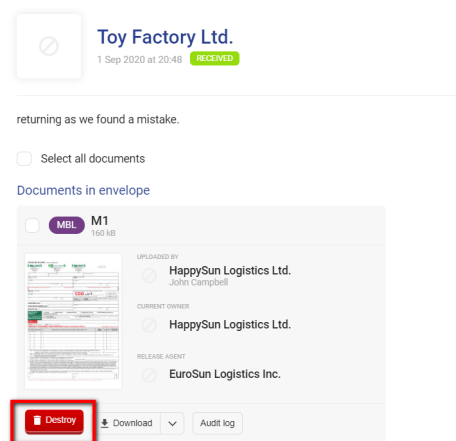
Once you receive the document back, it will show in your **Inbox** folder. Click on the envelope with the B/L document you wish to destroy and open the document. Inspect the audit log to verify the authenticity of the document. Verify all other details in the received documents and read the message that came along with the envelope as it might include specific instructions on how to handle the amendment.

If you are an original issuer of this document, you will see a red **Destroy** button available for the specific document.

### Step 3: Click the Destroy button

All transactions on the blockchain are irreversible and this also includes the destruction of the document. Please double-check that you are working on the correct B/L document before continuing.

Click the red **Destroy** button next to the document you wish to destroy.



### Step 4: Double-check all data

The destruction process always starts with an overview. Please carefully review the information as the document destruction process is irreversible! You can also review the instructions message if you received one with the envelope.

When ready, click the green **Next** button to continue.

**Destroy document**

Review

Sign and Destroy

Destroy the document

Double-check the document below. To destroy this document, click Next to continue.

MBL	M1	150 KB
UPLOADED BY	HappySun Logistics Ltd. John Campbell	CURRENT OWNER
	HappySun Logistics Ltd.	RELEASE AGENT
		EuroSun Logistics Inc.

Close

Next

### Step 5: Digitally sign the destruction of the document

To confirm the document destruction, you must authenticate and digitally sign it with your blockchain key. Select the checkbox if you understand and agree that the action can not be reverted, and click the green **Sign and Destroy** button to continue.

#### Note

If you have two or more blockchain keys linked to your CargoX Platform account, you have to first choose which one you wish to use. If your chosen key is locked, you first have to unlock it.

**Destroy document**

Review

Sign and Destroy

Sign and Destroy the document

Your blockchain key is unlocked and it will be used to sign this action.

Click the Sign and Destroy button to destroy your document.

☐ I understand that once I sign this transaction, the document will be destroyed. This cannot be reverted.

Back

Close

Sign and Destroy

### Step 6: Document destruction is underway

After you confirm the destroy action, the CargoX Platform will generate required blockchain transactions and send them to the blockchain. A few seconds later the summary will be shown. You can now close the pop-up.

**Destroy document**

Review

Sign and Destroy

Destruction successful

1 Signing destroy for document MBL M1

Document destroyed successfully.

Close

### Step 7: Status of the destroy document

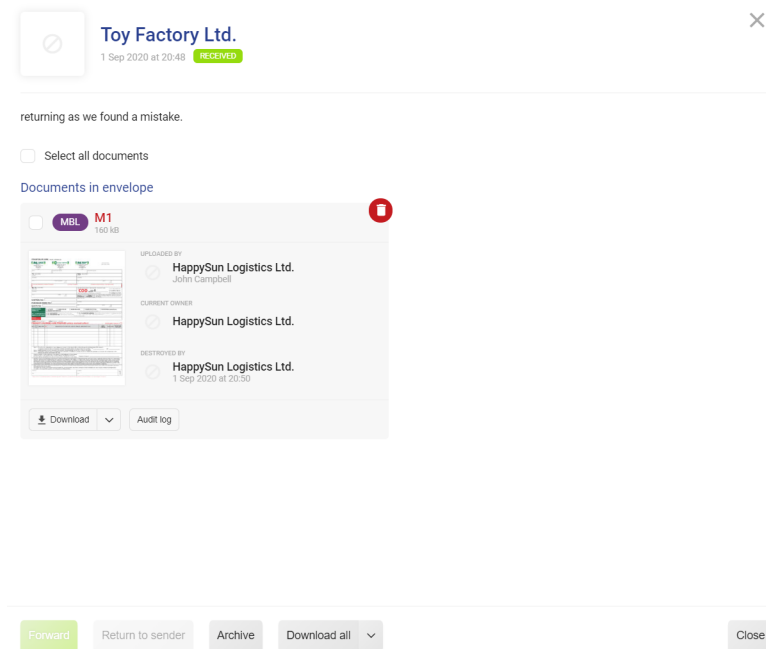
As you wait for the blockchain transaction destroying the document to complete you can observe the current status in the envelope view.

The animated white cubes icon on the red **Destroy** button indicates that document destruction is pending. No other actions will be available until the action completes.

The speed of the transaction depends on the state of the blockchain network and can normally take between a few seconds and a few minutes.

Once the animation stops and a red trashcan icon appears on the upper right corner of the document tile, the document has been destroyed.

The gray **Archive** button also becomes active at the bottom.



### Step 8: Issue a replacement document

You can now follow the composing a new smart envelope and document instructions to create a new envelope and upload an amended/corrected document where you are allowed to use the same document number as in the destroyed document.

After the creation of a replacement document or a B/L, seal it and send it back to the party that requested the amend or follow instructions they provided.

#### Note

The envelope with the destroyed document will remain in your **Inbox**, but you will notice the document type icon to be grayed-out, indicating that the envelope no longer holds the title of the document. Once you are done with a workflow around a particular document (probably after you issue and transfer a replacement document), you can easily remove it from your Inbox by clicking the Archive button which will move the document to the **Archive** folder. CargoX provides free digital storage of documents for a period of 10 years.

#### Note

The CargoX Platform provides superb visibility with a per-document audit log. Each document ownership or state change is written to the audit log, which you can see at any time by clicking on the **Audit log** button. You can inspect the audit log of the destroyed document and download a PDF proof that you destroyed to original before issuing a replacement.

## *Documents and pricing*

### *CargoX pricing policy and Units*

There are **no hidden fees** for using the CargoX Platform, there are **no contracts, no licenses to pay and no obligations**.

There are **no investments needed**. You only pay for the services you use (pay-per-use).

The company account and user **registration on the CargoX Platform are free of charge**. To register a new company on the CargoX Platform, click the <https://cargox.digital> and follow the Quick Start Guide.

#### **STANDARD ENVELOPE**

The standard envelope allows exchange of documents between companies on the CargoX Platform. The **one-time per-document fee is charged when the document is sent**, but there is no extra charge for the standard envelope itself. The document price varies based on the document type and the level of blockchain support. This fee can be **paid either by the uploader (i.e. the Issuer) or by the first recipient (collect payment)** of the document. All other parties who receive, forward or accomplish such documents use the platform for free.

#### **ACI ENVELOPE**

Government-focused services such as advance cargo information (ACI) filings have a different pricing structure. Since all documents sent using the ACI envelope have partial-blockchain support, a **one-time per-document fee is charged** and an additional **one-time per-envelope (transaction) processing fee** is applied. ACI envelope can only be sent to a pre-defined recipient (specific governmental authority). All fees are always paid by sender, as there is no collect-payment option.

### *What are units?*

CargoX is using a system of units for calculating final prices. One (1) CargoX unit equals 1 USD. Units can be purchased in packs directly through the CargoX Platform. The larger the pack, the better the units/price ratio. To view available packs, login to the CargoX Platform and open the **Billing** section (left sidebar).

A **complete price list for all document types** is also available in the **Billing** section. Multiple billing options are supported. Read more about the Billing section [here](#).

### *Your balance*

You can always see the balance of your units in the upper right part of the screen:

The screenshot displays the CargoX Platform user interface. On the left sidebar, the 'Billing' option is highlighted with a red box. The main area shows a list of envelopes, with one selected from 'Shipper Ltd.'. A detailed view of this envelope is shown on the right, including a 'Carrier' section with a balance of 5,727.00 CXS, a 'Documents in envelope' section showing a 'FIATA BL.pdf' document, and a bottom bar with actions like 'Forward', 'Return to sender', 'Archive', 'Download all', and 'Close'.

### Pricing example

For an original Master Bill of Lading, the cost of issuing the document on the blockchain typically falls on the issuing party (NVOCC/VOCC). The cost is 15 units (15 USD) per B/L, which covers up to 50 transfers of the document and 10-year digital storage.

Once on the blockchain, all other parties involved in the exchange (shipper/exporter/seller, consignee/importer/buyer, banks, traders, release agent...) do not pay any additional fees. The parties involved may also attach other (supporting) documents when forwarding the B/L.

Documents such as invoices, warranty letters, packaging lists, etc. can be added to the outgoing envelope. This helps keep all documents related to the transaction in one place. Documents are kept in digital storage and the CargoX Platform provides a simple way to search these documents.

### Billing

#### Note

In June 2021 CargoX has renamed CargoX credits to units. Change is cosmetic only. 1 unit (marked as U) still equals 1 USD. All existing user balances were automatically converted to the new denomination. There is nothing you need to do.

If you are unfamiliar with the CargoX Platform pricing policy please read that first.

**In the Billing section you can:**

- buy units
- review and download pro-forma invoices and paid invoices
- review the history of credit purchase and usage

- review the exact price for every document type
- review your billing details and change your billing email

The Billing section of the CargoX Platform can be accessed by following the **Billing** link in the left sidebar.

The screenshot shows the CargoX Platform interface. On the left sidebar, the 'Billing' link is highlighted with a red box. The main area displays a list of envelopes from various entities like Consignee Ltd., Shipper Ltd., and Chamber of Commerce. A pop-up window for 'Shipper Ltd.' is open, showing document details for 'FIATA BL.pdf' and a balance of 5,727.00 CX\$.

Alternatively, click the **Balance** of your units at the top of the screen. A detailed summary of your units will open in the **Account units balance** pop-up window (see below). To continue to the Billing section, click the green **Go to billing** button in the bottom right of the pop-up.

**Account credits balance**

Credits are used on the platform to pay for services.

List of credits, by type, currently assigned to your company.

Credit type	Amount
<b>Regular</b> <i>Regular credits are purchased directly on the platform.</i>	0.00 CX\$
<b>Pending</b> <i>Pending credits are credits which have been added to your account but haven't been confirmed by blockchain yet and are therefore not yet available.</i>	0.00 CX\$
<b>Reserved</b> <i>Some actions might reserve the credits temporarily before the action is executed. Such credits will show up here.</i>	0.00 CX\$
<b>Promotional</b> <i>Promotional credits are free and are issued by CargoX as rewards for loyalty or during promotions.</i>	5,727.00 CX\$
<b>Total</b>	<b>5,727.00 CX\$</b>

Close Go to billing

## Buy units

To buy units, click the **Buy units** tab and choose an units package. Please note that the **150 units pack is the minimum purchase**. If you need more than 15000 units please contact us for a quote.

Buy credits   Pro-forma invoices   Invoices   Credits history   Price list

Choose package   Payment & Billing   Review

### Explore credit packs

Select a credit package that suits your needs. If you need more credits or have any questions, contact our sales representative.

**150.00 CX\$**

Good for  
~10 B/Ls OR ~50 SWBs

Your price:  
**\$150,00**

Choose package

**1,500.00 CX\$**

Get extra 2.00% of your purchase for free in promotional credits \*

**30.00 CX\$**

Good for  
~102 B/Ls OR ~510 SWBs

Your price:  
**\$1.500,00**

Choose package

**3,000.00 CX\$**

Get extra 5.00% of your purchase for free in promotional credits \*

**150.00 CX\$**

Good for  
~210 B/Ls OR ~1050 SWBs

Your price:  
**\$3.000,00**

Choose package

Select the payment type and review the billing details. You can set up a dedicated email that will receive only billing details - proformas and invoices. Click the green **Continue to review** button, and confirm the purchase on the next screen.

A pro-forma will be generated and sent to your email (billing email) along with the payment information. Pro-forma will be in EUR if your company is from EU SEPA area, or in USD for rest of the world.

Once the payment is received, the invoice will be automatically generated and sent to your billing email. You will also see it in the Invoices tab. Units will be loaded into your account automatically.

Please note that SWIFT money wire transfer can take up to 7-10 days to clear.

### Pro-forma invoices

To view pro-forma invoices, click the **Pro-forma invoices** tab. Here you can download pro-forma invoices.

Buy credits   **Pro-forma invoices**   Invoices   Credits history   Price list

### Pro-forma invoices

Pro-forma invoice number	Issue date	Type	Payment deadline	Payment method	To pay	Status	Download PDF
189341-210400110	16 Apr 2021 6 days ago	Credits purchase	24 Apr 2021	Bank transfer	150,00 USD	UNPAID	<a href="#">Download</a>

### Invoices

After a proforma is paid, an invoice is generated. To view past invoices, click the **Invoices** tab. Here you can download invoices.

Buy credits   Pro-forma invoices   **Invoices**   Credits history   Price list

### Invoices

Invoice number	Invoice issue date	Type	Payment deadline	Payment method	To pay	Status	Download PDF
No items to show.							

### Units history

To review your purchase and spending history use the **Units history** tab. Use filters to narrow down the list.

Buy credits	Pro-forma invoices	Invoices	Credits history	Price list
-------------	--------------------	----------	-----------------	------------

Credits history		Search history ...	22 Mar 2021 - 22 Apr 2021
-----------------	--	--------------------	---------------------------

Show transaction	<input checked="" type="checkbox"/> Credits top up	<input checked="" type="checkbox"/> Credits expiry	<input checked="" type="checkbox"/> Document transactions	Show credit type	<input checked="" type="checkbox"/> Regular credits	<input checked="" type="checkbox"/> Promotional credits
------------------	----------------------------------------------------	----------------------------------------------------	-----------------------------------------------------------	------------------	-----------------------------------------------------	---------------------------------------------------------

Date	Transaction	Credit type	Change
21 Apr 2021 at 15:48	Document sent	Promotional	-15.00 cxs
14 Apr 2021 at 15:35	Document sent	Promotional	-15.00 cxs
14 Apr 2021 at 12:28	Document sent	Promotional	-15.00 cxs
12 Apr 2021 at 10:46	Document sent	Promotional	-15.00 cxs
12 Apr 2021 at 10:46	Document sent	Promotional	-3.00 cxs
11 Apr 2021 at 15:37	Document sent	Promotional	-15.00 cxs
11 Apr 2021 at 15:36	Document sent	Promotional	-3.00 cxs
7 Apr 2021 at 19:55	Document sent	Promotional	-15.00 cxs
7 Apr 2021 at 19:41	Document sent	Promotional	-15.00 cxs
7 Apr 2021 at 19:41	Document sent	Promotional	-3.00 cxs
			<b>-258.00 cxs</b>
			Topped up 0.00 cxs
			Spent 258.00 cxs

## Price list

There are costs associated with blockchain transactions. CargoX is handling these dynamic costs (gas fees and all other fees) in the background, with the goal to drastically simplify the user's blockchain experience. **The CargoX Platform users know exactly how much issuing and sending a document will cost them.** The complete price list per document type is available in the **Price list** tab of the Billing section.

Buy credits	Pro-forma invoices	Invoices	Credits history	Price list
-------------	--------------------	----------	-----------------	------------

Price list		Search documents ...
------------	--	----------------------

Show prices for industry	All industries X
--------------------------	------------------

Documents with **transfer of ownership on blockchain** (full support)

Provides a proof of authenticity and a proof of transfer on the blockchain. These documents are completely tracked on the blockchain. Ownership transfer is recorded on the blockchain when sending the document. Once sent, the document is not in your possession any more and can only be viewed as a copy. When document is finalized (released / accomplished / destroyed ...) the workflow stops and the document cannot be transferred any more. Complete history of the transfer is available on the blockchain.

Document type	Suitable for	Number of hops	Retention period	First transfer price	Consecutive transfer price
<b>EXC</b> Bill of exchange	General, Logistics / Other	No limit	10 years	60.00 cxs	FREE
<b>GOO</b> Guarantee of origin	Energy	No limit	10 years	60.00 cxs	FREE
<b>HAWB</b> House Air waybill	Logistics / Air	2	10 years	3.00 cxs	FREE
<b>HBL</b> House Bill of Lading <small>Smart B/L</small>	Logistics / Maritime	50	10 years	15.00 cxs	FREE
<b>MAWB</b> Master Air waybill / eAWB	Logistics / Air	2	10 years	3.00 cxs	FREE
<b>MBL</b> Master Bill of Lading <small>Smart B/L</small>	Logistics / Maritime	50	10 years	15.00 cxs	FREE
<b>NEG</b> Negotiable (Switch) B/L <small>Smart B/L</small>	Logistics / Maritime	No limit	10 years	60.00 cxs	FREE
<b>PN</b> Promissory note	Finance	50	10 years	15.00 cxs	FREE
<b>CIM</b> Rail waybill / eCIM	Logistics / Rail	2	10 years	3.00 cxs	FREE
<b>CMR</b> Road waybill / eCMR	Logistics / Road	2	10 years	3.00 cxs	FREE
<b>SWB</b> Sea waybill	Logistics / Maritime	2	10 years	3.00 cxs	FREE
<b>TLX</b> Telex release	Logistics / Maritime	2	10 years	3.00 cxs	FREE
<b>WR</b> Warehouse receipt	Logistics	50	10 years	15.00 cxs	FREE

Read more about the CargoX Platform pricing policy [here](#).

## Document types and blockchain support

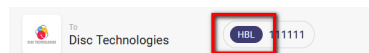
CargoX Platform supports many document types, including but not limited to different bills of lading, certificates, letters of credit, invoices, reports, claims... Depending on the document type these documents can have **full, partial, or no blockchain support**.

What does that mean? The CargoX Platform can **guarantee two things**:

- **The authenticity** of a document proves whether the digital document is an unchanged original
- **Ownership tracking and transfer** of any document awards ownership of the document and enables the owner to transfer it.

### Category 1 - Full blockchain support

Some documents, like a B/L which is a document of title, need both. The B/L document is not allowed to be changed during transfer, but it is equally important to know who owns it. Hence it requires **full blockchain support** (authenticity and ownership tracking), indicated by a document icon with a solid background.

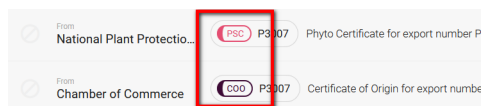


### Category 2 - Partial blockchain support

For other documents, such as certificates, it is only important to be able to guarantee the authenticity and provide means to detect whether the document is identical to the original issued on the CargoX Platform.

For these types of documents, the ownership information is not important, as it is legitimate to make copies of the document. A typical use case for this is a certificate, where anyone is allowed to make a copy of the certificate and still use it as an original. For example - a distributor of goods requests an official certificate of origin from the local chamber of commerce, and once it receives it, can create several copies and distribute them to their resellers. At the same time it is important to know who issued this certificate and have a mechanism to detect whether a distributed document is still identical to the originally issued certificate - which makes it an original.

In the CargoX Platform, this is called **partial blockchain support** - indicated by a document icon with a partially solid background.



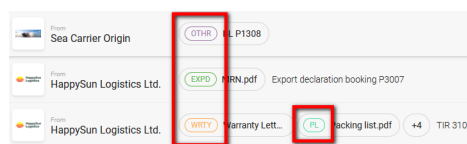
### Category 3 - No blockchain support

Finally, documents of the third type on the CargoX Platform are just regular digital documents, like an invoice or a note. Today everyone is happily exchanging these via the email, which means that these documents do not require any special features, like tracking authenticity or ownership.

The support of these documents on the CargoX Platform is a convenience feature. This allows you to manage all your documents on one platform - you can mix various document types in the same envelope as well.

You can create and upload these documents on the CargoX Platform free of charge. If you need, you can optionally include partial blockchain support even for these documents. For example - if you have a very important invoice to send to your customer, and would like to be completely protected against various scams, you can decide to enhance the uploaded document with authenticity tracking.

Documents with **no blockchain support** are indicated by an icon without a solid background:



## The difference between "proof of authenticity" and "proof of ownership"

Document pricing is based on the level of blockchain support and separated into three distinct categories, as shown below.

Level of blockchain support	Category 1 - Full support	Category 2 - Partial support	Category 3 - No support
	Documents and transfers recorded on the blockchain	Documents recorded on the blockchain	Documents outside blockchain
Proof of authenticity	SUPPORTED	SUPPORTED	NOT AVAILABLE
Proof of ownership	SUPPORTED	NOT AVAILABLE	NOT AVAILABLE

**Proof of authenticity:** When a document is uploaded/transferred through the platform, a token is created on the blockchain. The token includes a hash (digital fingerprint) of the digital document. It represents an undeniable proof of the time the document was uploaded/transferred and by whom and the fact that the document hasn't been altered in any way.

**Proof of ownership:** The uploaded content is treated as a document of title. The transfer of the document corresponds to a transfer of the token on the blockchain. A complete audit log with a history of ownership transfers is recorded on the blockchain. Once the document is sent the document's ownership changes and can only be viewed as a copy by the sender. The document may be finalized (released / accomplished / destroyed ...). When finalized, the workflow stops, and the document cannot be transferred anymore.

### Pricing

More about The CargoX Platform pricing.

### Benefits

**Regardless of which document type you use to send your documents, you will always enjoy all the benefits of using the CargoX Platform.** This begins with **enhanced security** in accessing the documents; **high speed** of document transfer and **guaranteed delivery of documents**, and it continues with **10-year free digital storage** (Archive) provided by CargoX.

For all documents uploaded and exchanged on the CargoX Platform the digital fingerprint information is calculated and an audit trail is provided. For documents with full and partial blockchain support the CargoX Platform allows you to download the audit log report and provides the links to the public blockchain block explorer - enabling access to the fundamental public blockchain layer as a single source of trust and even removing the need to trust CargoX as a service provider.

It makes sense to use the CargoX Platform even when sending documents with no blockchain support, as **CargoX provides what regular email can not:**

- Assurance of envelope delivery - email has no default functionality or standard to do that
- Provision of a digital trail every time a document is sent, visibility who is currently in possession of a document that we passed forward. Optionally, give the sender the information when a recipient opens the envelope (TBD). Email can not do any of that.
- Envelopes and documents sent via the CargoX Platform can not be intercepted and changed by a third party (hackers, etc.).

### Who will pay for the transfer?

Each document that uses blockchain for either proof of authenticity or proof of ownership (or both) needs to be paid for.

The price depends on the type of document and the level of blockchain support. Each document requires payment for the service only once as CargoX is never double-charging. All the other parties involved in the transfer of that document partake in the process free of charge, and they can forward and/or accomplish the document for free as well.

The CargoX Platform uses units to pay for the document processing. Read the CargoX Platform pricing policy to learn more about units.

Your unit balance is charged at the moment of the envelope transfer. That is the moment when the actual blockchain transaction is created and the envelope ownership enters the transfer phase. Other actions, such as the compose, seal and unseal of the envelope and/or upload of the document are not charged, as well as user account creation and management.

**The issuer (uploader) pays for the transfer**

The transfer cost is usually covered by the issuer (uploader) of the document. When initiating the transfer - after you click the green Transfer button on the sealed envelope - the pop-up with a summary will appear.

In the bottom part of the window, the total price needed to be paid will be displayed, along with the option to choose who will cover this cost.

To continue select **I will pay** and click the green **Next** button.

If you have enough units available in your company account, the envelope transfer will start. If not, you will be presented with an option to purchase additional units or send the envelope with the collect payment option.

**Send documents** [X]

Transfer 1 envelope(s) containing 1 document(s).

You are about to transfer 1 envelope(s) containing 1 document(s). Double-check the document(s) included in the envelope(s) and verify that you have selected the right recipient(s). Click Next to continue.

Envelope recipient	Documents in envelope	
Disc Technologies	HAWB h67687	0.20 CR

Who will pay for the transfer? You will pay: 0.20 CR

☒ I will pay

☐ Recipient will pay (pay to collect)

Close Next

**The first recipient pays for the transfer (collect payment)**

Alternatively, the first recipient can cover the costs of the transfer.

**Tip**

**Before using the collect payment feature, make sure the recipient agrees to cover the cost of the transfer.**

**Note**

This option was developed on request by shippers and exporters. It allows them to rapidly onboard their transport and business partners - the actual issuers of the documents - who now have no direct cost with the CargoX Platform. Frequently shippers and exporters use this approach to negotiate lower document-related fees of issuers.

When the transfer window opens, choose the **Recipient will pay (pay to collect)**. The payment summary will change accordingly, showing zero cost for the issuer, and displaying the cost summary to the recipient. Click **Next**.

**Send documents** [X]

Transfer 1 envelope(s) containing 1 document(s).

You are about to transfer 1 envelope(s) containing 1 document(s). Double-check the document(s) included in the envelope(s) and verify that you have selected the right recipient(s). Click Next to continue.

Envelope recipient	Documents in envelope	
Disc Technologies	HAWB h67687	0.20 CR

Who will pay for the transfer? You will pay: 0.00 CR

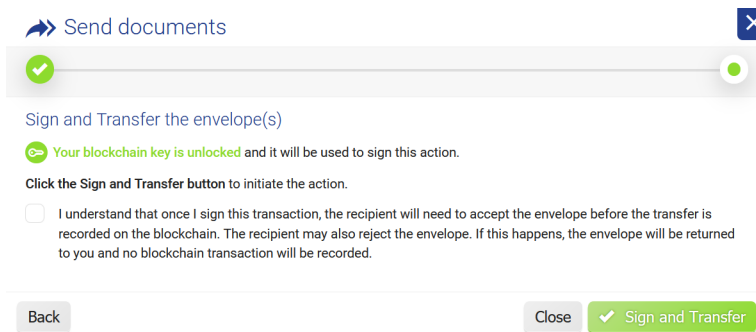
☐ I will pay

☒ Recipient will pay (pay to collect)

Disc Technologies will pay: 0.20 CR

Close Next

As with a normal transfer, you need to sign the transfer with your blockchain private key to initiate it. Before clicking the green **Sign and Transfer** button, read the explanation, and check the checkbox to indicate that you understand and agree with the process.



## Note

The recipient will need to accept the envelope before the transfer is recorded on the blockchain. **The recipient may also reject the envelope, therefore make sure the recipient is in agreement with covering the cost of the transfer.**

If the recipient rejects the transfer, the envelope will be returned to you. A **Returned** folder will appear in your folders list and no blockchain transaction will be recorded.

## Insufficient units?

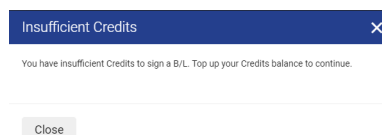
Each document that uses the blockchain for either proof of authenticity or proof of ownership (or both) requires payment for the service. This cost can be covered by the issuer (uploader) of the document, or by the first recipient (collect payment). CargoX is never double-charging users.

The price depends on the type of document and the level of blockchain support. All other parties involved in the transfer of that document partake in the process free of charge and they can forward and/or accomplish the documents free of charge as well.

The CargoX Platform uses units to pay for the document processing. Read the CargoX Platform pricing policy to learn more about units.

Your unit balance is charged at the moment of the envelope transfer. That is the moment when the actual blockchain transaction is created and the envelope ownership enters the transfer phase. Other actions, such as the compose, seal and unseal of the envelope and/or upload of the document are not charged, as well as user account creation and management.

If you do not have enough units to initiate the blockchain transfer, you will see the insufficient units pop-up warning:



To purchase additional units, visit the Billing section in the CargoX Platform workspace.

Alternatively, you can decide that the recipient will cover the costs of transfer by using the collect payment transfer but make sure the recipient is in agreement with that.

## How to use the rules and filters?

The **Rules and Filters** section allows you to prepare a scenario or a rule on how the platform behaves when something specific happens.

This is especially useful in situations where your company exchanges lots of envelopes, and not all of your users need to see all those notification emails. Using rules you can set up which envelopes trigger a notification sent to all users, and which notifications are only sent to a particular user.

Combining rules with filters allows users to filter which envelopes they see in the application.

### How to set up a rule?

- Go to **Manage | Rules** and click the green **Add** rule button.
- In the window that opens, provide the **name** for this rule.
- Click the **When** box and choose a trigger. For example, in the picture below, the user has chosen **Envelope received**, which means that this rule will be triggered every time this company receives a new envelope.
- Click the **Select action** field and choose an action. Two possible actions are displayed below - **send email to** (specific email address) - or - **Send email to all users in my company** (which will send email notification for a newly received envelope to all CargoX Platform users in your company).
- Click the **Save rule** button to save and activate the rule.

Add new Rules and Filters

### Note

List of triggers and actions is being expanded.

### How to set up a filter?

The filter functionality is coming in the near future!

### Three minute challenges

#### Exploring the CargoX Platform

To help you with the first steps, we have designed a series of short challenges (tasks) which will take just 2-3 minutes to complete.

**Task 1:** Review your profile and complete your personal details. You can add your avatar photo, phone number, and other info like your department, your position, etc. and view your permissions on the platform (Account | My profile)

**Task 2:** Review your company details, add contact details and a company logo (My company | Company details)

**Task 3:** Create additional user accounts for your co-workers (Manage | Users). NOTE: Do not worry, you can always remove them.

**Task 4:** Connect with other companies on the CargoX Platform. This will allow you to exchange documents with them (Manage | Contacts)

**Task 5:** Create your first Smart envelope and attach a document

These tasks are basic tasks, and you can find all the answers on how to complete them in the CargoX Platform users manual. Take a challenge and try to do it yourself!

We would love to hear about your experience. Let us know via a chat icon in the corner below.

### Challenge 1: Update your profile

Your **first** challenge is to check your personal information. Verify the information and update it if necessary. Be sure to add your phone number, title, and department. You can also **upload your photo**.

Every time you send an invitation to connect to another company on the CargoX Platform, your contact details will be provided to the recipient. This allows recipient to verify that you are indeed a person they know from the real world. It also allows the invitee to contact you and ask you any questions they might have before accepting the invite and maybe even before creating their CargoX Platform account.

We suggest that you complete your contact details with your phone number, and your department and your position. You can also add a photo or an avatar image in your profile, which will further personalize your CargoX Platform experience (no one else will see your photo).

#### Tip

Account | My profile

If you need help, check out the update your profile help.

### Challenge 2: Company profile

Your **second** challenge is to verify your company information in the *Company details* and update it as necessary.

#### Note

Make sure you add, review and correct all the company details including your logo (by clicking on the icon) **on the first time**, as later changes go through manual approval process to assure high level of safety and consistence of the CargoX ecosystem. If you need to change anything later, a message box will appear where you can provide the instructions to CargoX staff, who will make the changes only if the verification checks out. If you want to add a logo later, email the PNG or JPG to [support@cargox.io](mailto:support@cargox.io).

Why is it important to have a company details complete? Because every time you invite another company to connect with on the CargoX Platform, they will see your company information. If you leave some fields empty - the recipient will have less information to verify. This might delay their acceptance of your connect invitation or even prevent it altogether.

Once companies are connected on the CargoX Platform, they can see each other's details, so make sure you have entered the correct address, phone, etc. Also be sure to add a VAT (tax) number and website address.

Continue by checking the billing address (if it differs from the main address), and be sure to provide an email for billing information.

#### Tip

My company | Company details

If you need help editing the company details, here are the step-by-step instructions.

### Challenge 3: Create an account for your co-worker

The **third** task is straightforward: Create a CargoX Platform account for your co-worker (if your account has permissions to do it).

Your company CargoX account can have many users under it.

Due to security, users can not register their CargoX accounts directly and then nest themselves under an existing company account. The right procedure is for existing users to create new accounts for their co-workers.

### **Tip**

Manage | Users.

When setting up a new user account you have to set their permissions. Users can have various access rights - according to their job title and responsibilities.

Read more about adding users to your corporate CargoX account. You can also read more about different user permissions here.

### **Challenge 4: Invite your business partners to the CargoX Platform**

Before you can **exchange documents** on the CargoX Platform, you first need to connect with other companies on the platform.

Therefore, as **task four**, look around in your Contacts section to see which companies you are already connected to. Check whether your co-workers have already sent the invitations to connect to some other companies - or if you have any pending invitations from companies as well.

Then **send invitations to connect to three new companies** - these might be your business and transport partners or anyone who your company sends to or receives documents from.

**All you need to do is provide their email**, and the system will do the rest. This will only work if your account has permission to manage contacts for your company.

### **Tip**

You might want to explain about the CargoX Platform to your partners first so that the invitation email they will receive, does not surprise them. We have prepared some email templates for that purpose.

### **What will happen?**

If your business partners are not yet registered on the CargoX Platform, they will have to complete the registration process before you will see them in your contacts list (a short 5-minute process).

If they already have a CargoX Platform account, they only need to accept your invitation to connect - it only takes them one click.

### **Challenge 5 - Create and Seal a Smart envelope**

Your **fifth and the last task** is to create your first Smart envelope and attach a document to it.

There are two main ways to create an envelope:

- Create a new one (compose)
- Choose a received document and forward it

If you have not received any envelope yet, then your inbox is empty. If you do see some envelopes in the Inbox, they might be important - so better not mess around with those.

What we suggest you do:

1. Compose a new envelope.
2. Upload a new document from your computer.
3. Set the document type to the Master bill of lading.

4. Explore editing the document properties.
5. Add the number of the document.
6. Select the designated release agent.
7. Enter an email or two in the notify party section (can be your email address, or your co-workers).
8. On the next tab add some tags.
9. When done, click Save and return to the envelope.
10. Provide a message below.
11. Because in the previous task you have already connected with several companies in your Contacts section, you can now select a recipient for your envelope.
12. When you are done, seal the envelope. A sealed document is prepared for sending.

### **Note**

Creating and sending the document of title (such as the Master B/L used in this exercise) involves a service charge. Therefore we suggest to stop at this point - before sending the document. If you would, however, like to complete the transfer, you could click the Transfer button, and sign the transfer with your blockchain key.

You did it. Bravo!

### **Note**

To automate this step and prevent repetitive work we would like to invite you to explore options of integrating the CargoX Platform via our API. Integrating it with your backend/ERP system will drastically speed up the process of preparing and sending documents. Read more in the [CargoX Platform API and technical documentation](#).

## **Egypt ACI**

Information about the Egyptian ACI filing over the blockchain based CargoX Platform

### **Egyptian ACI filing - What? Why? How?**

**Please visit our Egypt ACI FAQ to get answers on all your questions**

To provide clarity and help you understand the Egypt ACI process and what participating parties need to do - please read the [ACI CargoX FAQ](#).

#### **STATUS:**

On April 1st Egypt started the public pilot by opening the Egyptian customs system (NAFEZA) to all Egyptian companies (importers), who are now able to register their import shipments and request an ACID number. In order for importers to complete this process, the exporter must be already registered in the CargoX Platform. If you are an exporter register your free CargoX account at <https://cargox.digital> and allow your Egyptian importer to complete his part of the process.

**You can submit ACI from April 1st 2021. There is no need to wait, as with October 1st 2021 electronic ACI filing becomes mandatory. Get ready as soon as possible.**

#### **QUESTIONS?**

In case you have any questions regarding the ACI process, requirements of the Egyptian customs or NAFEZA system-specific, contact [ACI.CAMPAIGN@MTS-EGY.COM](mailto:ACI.CAMPAIGN@MTS-EGY.COM). Follow the [official Nafeza webpage](#) for more info.

If you have questions regarding the use of the CargoX Platform (and digital filing of the ACI documents - once you have received the ACID number from the importer) or need support during the registration on the CargoX, please contact [support@cargox.io](mailto:support@cargox.io) or use the chat function within the platform.

## Prerequisites for Egypt ACI filing

To send the ACI envelope to NAFEZA, you first need to complete the **CargoX company verification process**. A detailed step-by-step instructions is available on company verification.

**Passing company verification is mandatory, as the Egyptian customs require us to only allow ACI filing from verified exporters.** You only need to pass company verification once.

Once you complete the verification, you will be able to start the ACI filing as explained in the tutorial on how to create and send ACI envelope.

### WHAT IS REQUIRED TO PASS THE VERIFICATION?

**First part** of the company verification is tied to the bank verification. As banks worldwide are mandated to know their customers, we need to receive one bank payment from your company.

You need to complete a purchase of CargoX service units (you will later use them to pay ACI filing fees, transfer of documents and other services).

**Payment must come from your company's bank account, as we use this information to match it against your company details. Many companies fail the verification process because payment comes from another company in the group, or by their trading partner. This is not allowed!**

When the match of data is confirmed, the first part of your company verification is complete.

### Note

**Why no Credit cards?** Bank wire payment is a part of the company verifications process (as mandated by Egyptian customs), as it allows us to compare bank wire payee information with the company details entered when registering a CargoX account. Details need to match to pass the bank verification. Credits cards will be added later this year, and will be available to all verified companies.

### Note

**Why do we need to pay to CargoX?** Please note that one-time per-ACID processing cost of each ACI filing is published on the official website <https://www.nafeza.gov.eg/en/site/aci-faq>. Along with the ACI filing fee, the sender of the documents will need to cover the cost of blockchain document transfer via the CargoX Platform. The cost is \$3 per document. You can read more in the CargoX pricing policy. For example, if your ACI filing will include 4 documents (see the list of required ACI documents), the blockchain document transfer cost will be \$12, and the total along with the ACI filing fee would be \$62.

**In the second part** of the company verification process, CargoX uses a 3rd party provider (Dun & Bradstreet) to verify your company details (as found in **My company | Company details**) with your country's official national company registry.

Your company details (company name, address, registration number, tax/VAT number) should completely match the data in official records.

If needed, make changes by clicking the Edit company details button. before starting the verification process.

Please note that the cost of this final verification is \$15. This is one-time cost per company. Once you have purchased some service units initiate the company verification by clicking the **Verify now** button.

### QUESTIONS?

In case you have any questions regarding the ACI process, requirements of the Egyptian customs or NAFEZA system-specific, contact [ACI.CAMPAIGN@MTS-EGY.com](mailto:ACI.CAMPAIGN@MTS-EGY.com). Follow the [official Nafeza webpage](#) for more info.

If you have questions regarding the use of the CargoX Platform (and digital filing of the ACI documents - once you have received the ACID number from the importer) or need support during the registration on the CargoX, please contact [support@cargox.io](mailto:support@cargox.io) or use the chat function within the platform.

### ***Which documents and what formats are required for the ACI filing?***

Please note that the official and always up to date information regarding the list of required documents for the advance cargo information (ACI) document manifestation to the Egyptian customs is published at <https://www.nafeza.gov.eg/>.

### ***Documents***

At the time of updating this help page (18.8.2021), the following documents were listed as required when filing ACI, and the accepted file formats are also discussed below.

#### **MOST ACI FILINGS REQUIRE THE FOLLOWING DOCUMENTS:**

- **Draft Bill of Lading** or **Bill of Lading Copy** (do not upload original BL - only a copy/draft is needed)
- **Packing List**
- **A commercial invoice** (must include tax/VAT ID for both importer and exporter; must match with data entered in Nafeza by the Importer)
- **Certificate of origin**

Depending on shipment/cargo, other documents might be required, such as other certificates (e.g. phytosanitary certificate...) and other documents from the list below. The complete list of NAFEZA supported documents is below (will appear on the official website <https://www.nafeza.gov.eg/en> soon). You can not send any other document types in the ACI envelope.

ID	Name
MATS	Bill of materials
COA	Certificate of analysis
COF	Certificate of fumigation
COI	Certificate of inspection
CINS	Certificate of insurance
COO	Certificate of origin
DN	Delivery note
DBL	Draft Bill of Lading
EUR1	EUR.1 movement certificate
GOO	Guarantee of origin
HAL	Halal certificate
COH	Health certificate
INV	Invoice
MSDS	Material Safety Data Sheet
PL	Packing list
PSC	Phytosanitary certificate
PROI	Pro-forma invoice
COV	Veterinary certificate

**NOTE:** Each required document must be uploaded as a separate file on the CargoX platform, and set the correct document type. It is prohibited to combine several documents into one file.

### ***File formats***

Please be aware that **MTS/NAFEZA** accepts only **PDF** documents.

There are **two exceptions** - as for **INVOICE** and **BILL OF LADING (COPY/DRAFT)** document type, also XLS/XLSX (Microsoft Excel) spreadsheet files are accepted. However, **the INVOICE spreadsheet needs to follow the predefined format** - the template provided by NAFEZA can be downloaded [here](https://www.nafeza.gov.eg/en) (will appear on the official website <https://www.nafeza.gov.eg/en> soon).

**WARNING:** This means that if you upload the Packing list document as an Excel file, this document will not register on Nafeza, and will not be displayed to your importer. The same is true if you upload an Invoice excel file, which does not follow the predefined structure as provided in the template above.

## Composing and sending ACI envelope

### Attention!

*Quick instructions: First unlock your blockchain key. Then, once your company is verified, click the green Compose button and choose Egyptian ACI envelope. Enter the ACID number. Provide all required documents (either via upload, or from Inbox) and fill in the properties. Seal and then transfer the envelope. You are done.*

*You can also watch a [tutorial video](#) or follow the extensive step-by-step guide below. You can also download [this guide as PDF](#).*

### PREREQUISITES:

- Your blockchain key must be unlocked
- Your company account needs to be verified
- You need to have enough service units to pay the ACI filing fee
- You need to have *Transfer documents and envelopes* permission to be able to submit ACI filing.

Egyptian customs require that only verified exporters can initiate the ACI filing. To check whether you have completed the CargoX company verifications process go to **My company | Get Verified**. If you see a screen similar to this one (three green checkmarks) then you are ready to continue.

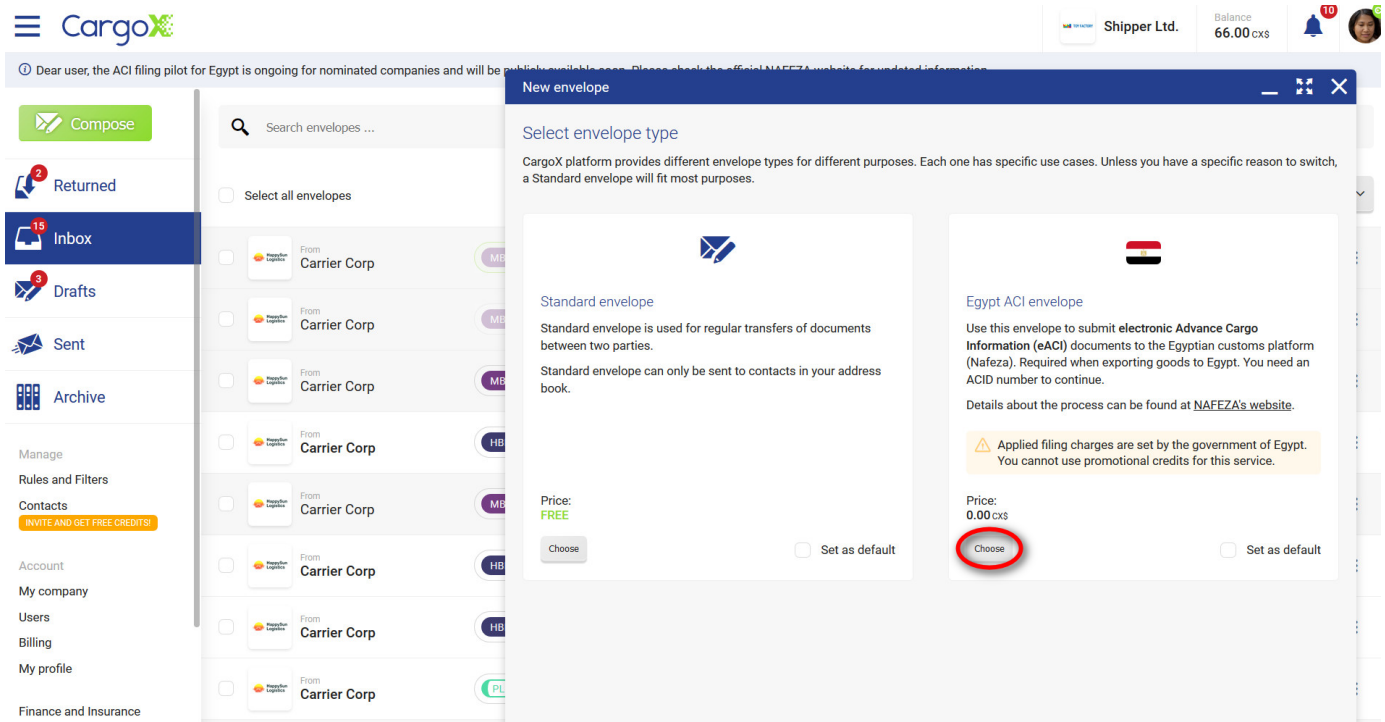
The screenshot shows the CargoX web interface. The top navigation bar includes the CargoX logo, a user profile section for 'Shipper Ltd.' with a balance of 66.00 CX\$ and a notification bell, and a message about the ACI filing pilot for Egypt. The main content area is titled 'Get verified' and contains three verification steps, each with a green checkmark indicating completion:

- Create your company profile:** Your first step towards getting verified is done. Your company has an account at CargoX.
- Buy credits via bank transfer:** We verify the details provided by the bank if they match what we have on file. A 'Buy now' button is visible.
- Verify your data via 3rd-party service:** We use the details you provide to match them to official registry in your country.

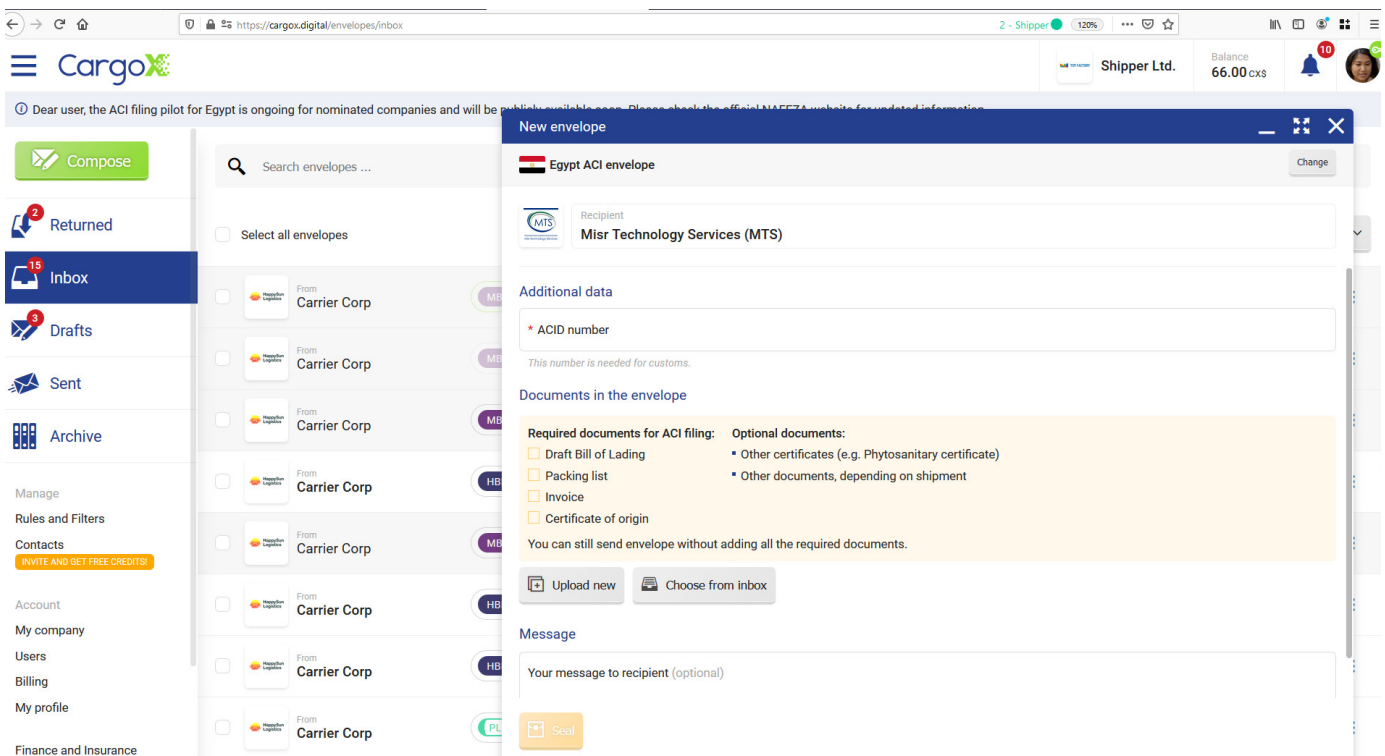
The left sidebar contains navigation links for 'Compose', 'Returned', 'Inbox', 'Drafts', 'Sent', 'Archive', 'Manage', 'Rules and Filters', 'Contacts', 'Account', 'My company', 'Users', 'Billing', 'My profile', and 'Finance and Insurance'.

### Step 1: Create a new Egypt ACI envelope

Click the green **Compose** button to create a new envelope. You will see an envelope selection window:



To continue, select the **Egypt ACI envelope**, which will create a new blank ACI envelope:



The recipient field is already preselected, as it is only possible to send ACI envelope to the Egyptian customs. To send the ACI envelope you do not need to be connected with the Egyptian customs on the CargoX Platform.

## Step 2: ACID number

Enter the ACID number for your export shipment in the first field.

This is the number you should have received from your Egyptian importer. They get it from NAFEZA once they register the import shipment with the Egyptian customs authority.

ACID number will be verified at the later point, so make sure this is a valid ACID number.

The screenshot displays the CargoX platform interface. On the left is a sidebar with navigation options: Compose, Returned, Inbox (15), Drafts (4), Sent, Archive, Manage, Rules and Filters, Contacts (with a button 'INVITE AND GET FREE CREDITS'), Account, My company, Users, Billing, My profile, and Finance and Insurance. The main area shows a list of envelopes from 'Carrier Corp'. A modal window titled 'New envelope for Misr Technology Services (MTS)' is open, showing an 'Egypt ACI envelope' form. The form includes a recipient field for 'Misr Technology Services (MTS)', an 'Additional data' section with a highlighted ACID number '4988470982021030008', and a 'Documents in the envelope' section with a checklist of required and optional documents. The required documents are Draft Bill of Lading, Packing list, Invoice, and Certificate of origin. The optional documents are Other certificates (e.g. Phytosanitary certificate) and Other documents, depending on shipment. There are buttons for 'Upload new' and 'Choose from inbox'. A message field is also present. At the bottom right, it shows 'Total envelope price 0.00 cxs'.

### Step 3: Attach documents

A typical ACI filing will contain these four documents. On the top of the envelope you can see the checklist that will help you attach all the needed documents.

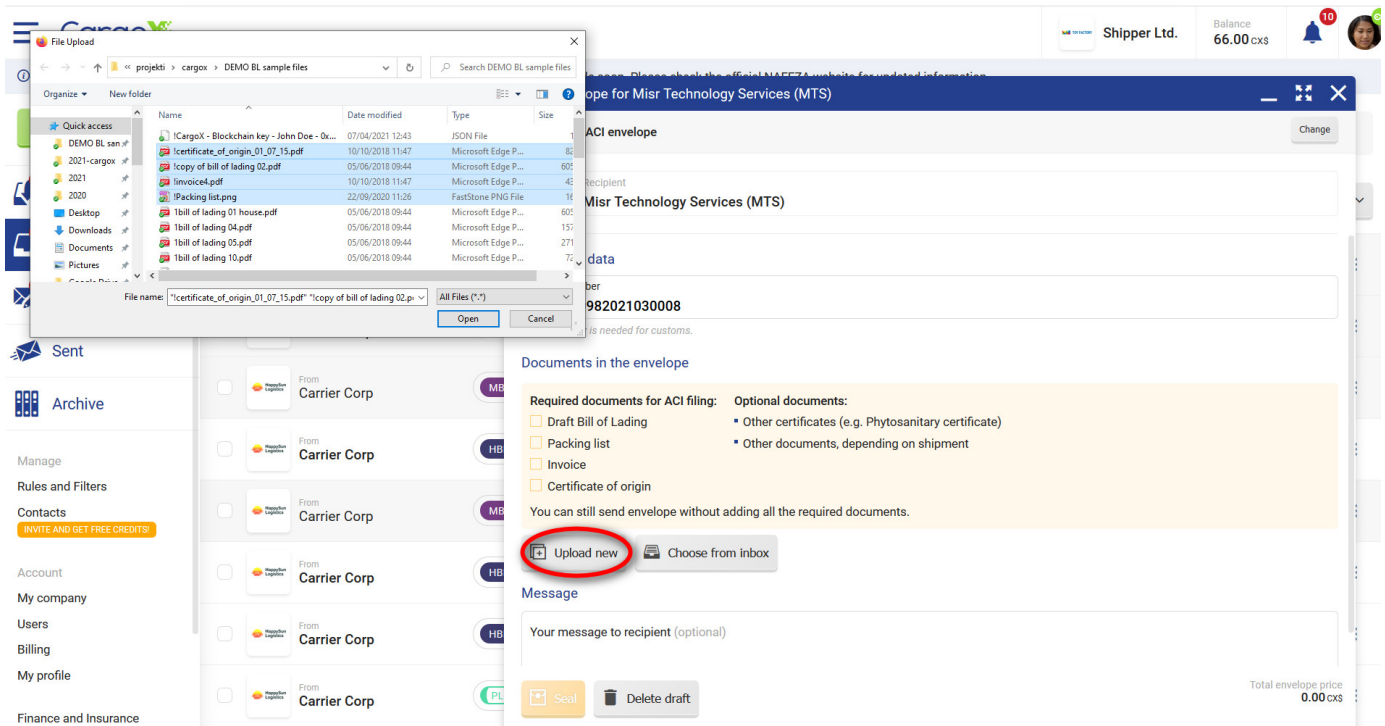
#### Note

Please note that depending on your shipment, more documents might be required (various certificates etc). Please check the list of accepted documents and supported file formats for ACI filing.

You can either upload a document from your computer, or select one that you received via the CargoX Platform. You can also mix both methods.

#### - Uploading local documents

Use the gray **Upload new** button to upload documents from your computer. To add documents from your computer select one or multiple documents in the file browser and confirm upload. You can also drag and drop documents from your file explorer or finder app to the draft envelope in your browser.



### - Adding them from your inbox

Use the gray **Choose from inbox** button to attach documents from the Inbox folder. Inbox contains documents received over the CargoX Platform that are currently in your possession.

In the **Choose document** pop-up select the documents you want to attach and click the green **Add to draft** button.

### - You can also remove documents from the draft

To remove the documents, just click the gray **Remove** button next to them, and confirm removal in the dialog.

This will not really delete the document from your CargoX Platform account, but it will just remove it from the draft envelope you work on.

### Step 4: Add additional information in properties

For each uploaded document you have to provide mandatory **document type** information.

Click the **Properties** button for a specific document and select its **Document type**.

Use the drop-down menu to scroll through all available document types, or click in the field and start typing to filter down the possibilities.

X

Document properties

## !certificate\_of\_origin\_01\_07\_15.pdf

General !

Tags

File properties

### Document type

\* Document type

cert

Insurance

CINS

Certificate of insurance

3.00 CX\$

Logistics / Certificates

COA

Certificate of analysis

3.00 CX\$

COF

Certificate of fumigation

3.00 CX\$

COI

Certificate of inspection

3.00 CX\$

CINS

Certificate of insurance

3.00 CX\$

COO

Certificate of origin

3.00 CX\$

☐ Full blockchain support
☐ Partial blockchain support
☐ No blockchain support

FILE NAME

!certificate\_of\_origin\_01\_07\_15.pdf

FILE TYPE

PDF (84 kB)

UPLOADED BY

Shipper Ltd.

Close

Save

Some document types such as bills of lading or certificates can have more mandatory fields that you need to fill. These fields are clearly marked with the red **This field is required!** label.

## Note

In the screenshot example below, the user selects the **Certificate of origin** and needs to provide a mandatory values - the **Certificate number** (user copies the certificate number from the uploaded document).

Document properties

COO 12312312

General

Tags

File properties

### Document type

\* Document type

COO Certificate of origin X

### Document properties

\* Certificate number

12312312

Unique serial id of the certificate

FILE NAME

!certificate\_of\_origin\_01\_07\_15.pdf

FILE TYPE

PDF (84 kB)

UPLOADED BY

Shipper Ltd.

DOCUMENT TYPE

FIRST TRANSFER PRICE

3.00 CX\$

Close

Save

## Note

Documents added from the Inbox already have properties these set, as their uploaded did it.

### Step 5: Save the document changes

Once you are satisfied with the properties of the document, click the green **Save** button to return to the envelope view.

You can repeat the process of providing properties for other uploaded documents, or upload or add another document.

If you scroll to the top of the ACI envelope window, you will see the checklist getting check marks as specific documents are added to the envelope. This is just a visual indicator to help you.

## Note

Please note that you are still responsible to check with customs which documents are required based on the particularities of your shipment.

Egypt is ongoing for nominated companies and will be...

**New envelope for Misr Technology Services (MTS)**

**Egypt ACI envelope**

Recipient: Misr Technology Services (MTS)

**Additional data**

\* ACID number: 4988470982021030008  
This number is needed for customs.

**Documents in the envelope**

**Required documents for ACI filing:**

- ☒ Draft Bill of Lading
- ☒ Packing list
- ☒ Invoice
- ☒ Certificate of origin

**Optional documents:**

- Other certificates (e.g. Phytosanitary certificate)
- Other documents, depending on shipment

You can still send envelope without adding all the required documents.

Upload new | Choose from inbox

**COO 12312312** 3.00 cxs | 84 kB **NEW**

UPLOADED BY Shipper Ltd. ✓

**DBL B91-1232-4** 3.00 cxs | 619 kB **NEW**

UPLOADED BY Shipper Ltd. ✓

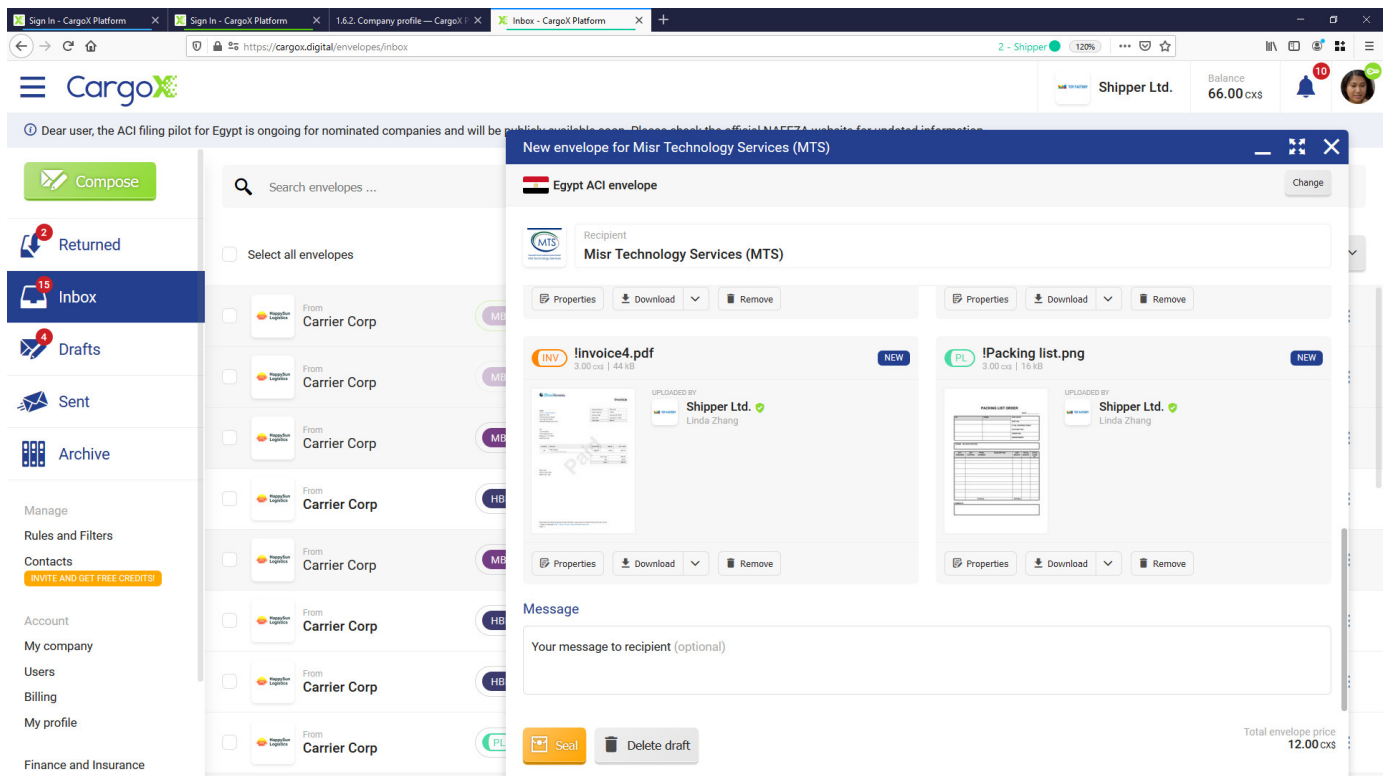
**Total envelope price 12.00 cxs**

### Step 6: Verify the price to send the envelope

In the bottom right corner of the envelope, you can see the price (in units) to transfer the envelope.

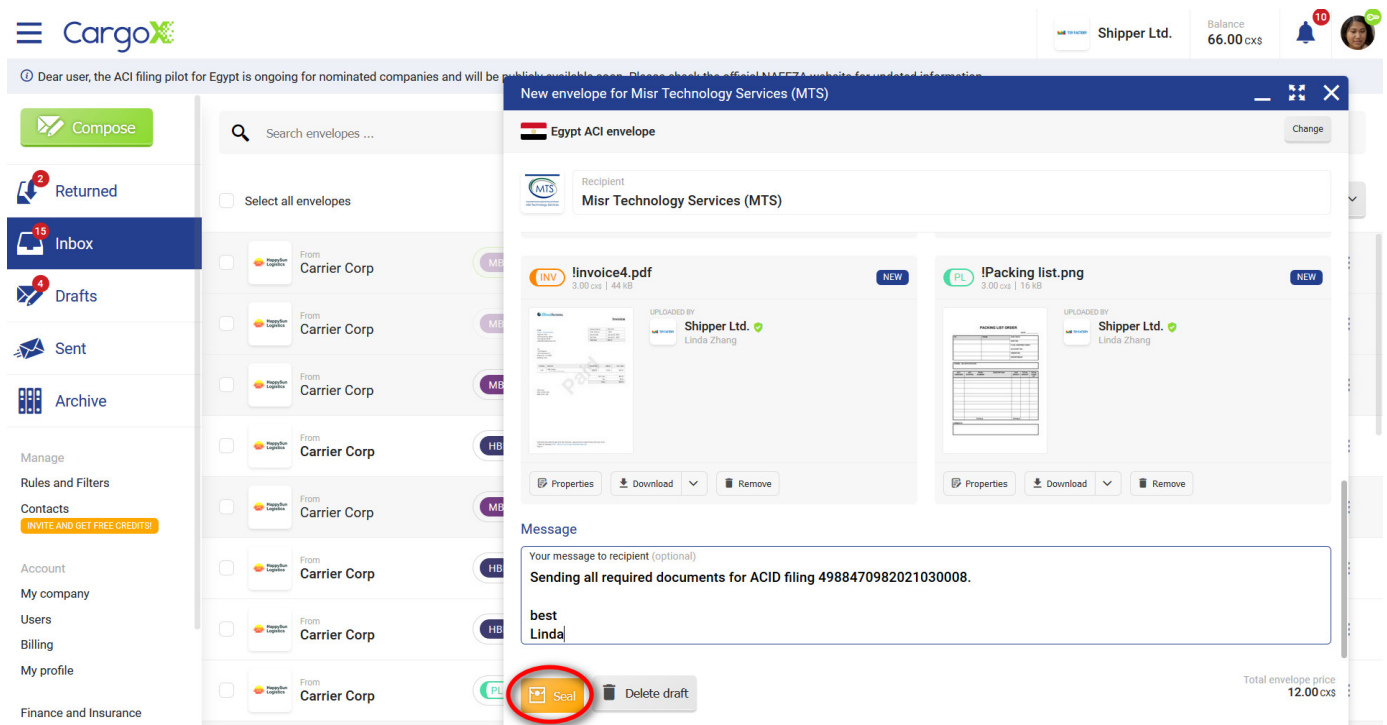
ACI filing processing fee is charged only once per ACID number, which means that even if you are asked to amend or complete your ACI filing, you will not need to pay another ACI processing fee.

You will also have to cover blockchain document transfer fee for each document as specified in the **CargoX pricing policy**. You only pay the CargoX blockchain document transfer fee if you are uploading document to the blockchain. If you are only forwarding document already received through CargoX, this is always free of charge (the document's blockchain fee has been paid for by the original sender).



### Step 7: Add an optional message

Just like with an email, you can add an optional text message to the envelope. The message will only be visible to the NAFEZA. Write it into the provided field.



### Step 8: Seal the envelope

Once you are satisfied with the envelope, click the orange **Seal** button to prepare it for transfer.

### Note

On the CargoX Platform, sealing the envelope creates a digital fingerprint (hash) of all documents, encrypts documents, and finally moves them to the decentralized storage (IPFS). This corresponds to putting the paper documents into the courier's envelope when dealing with physical documents.

The sealed envelope is still in your possession. But a new action becomes available - the possibility to **transfer** it. When an envelope is sealed, you can no longer change it (add or remove documents or make any other changes). However, you can still **unseal** the envelope and change the documents, their properties, or even the message. After that, you can seal the envelope again.

You can also delete the draft envelope if you no longer need it.

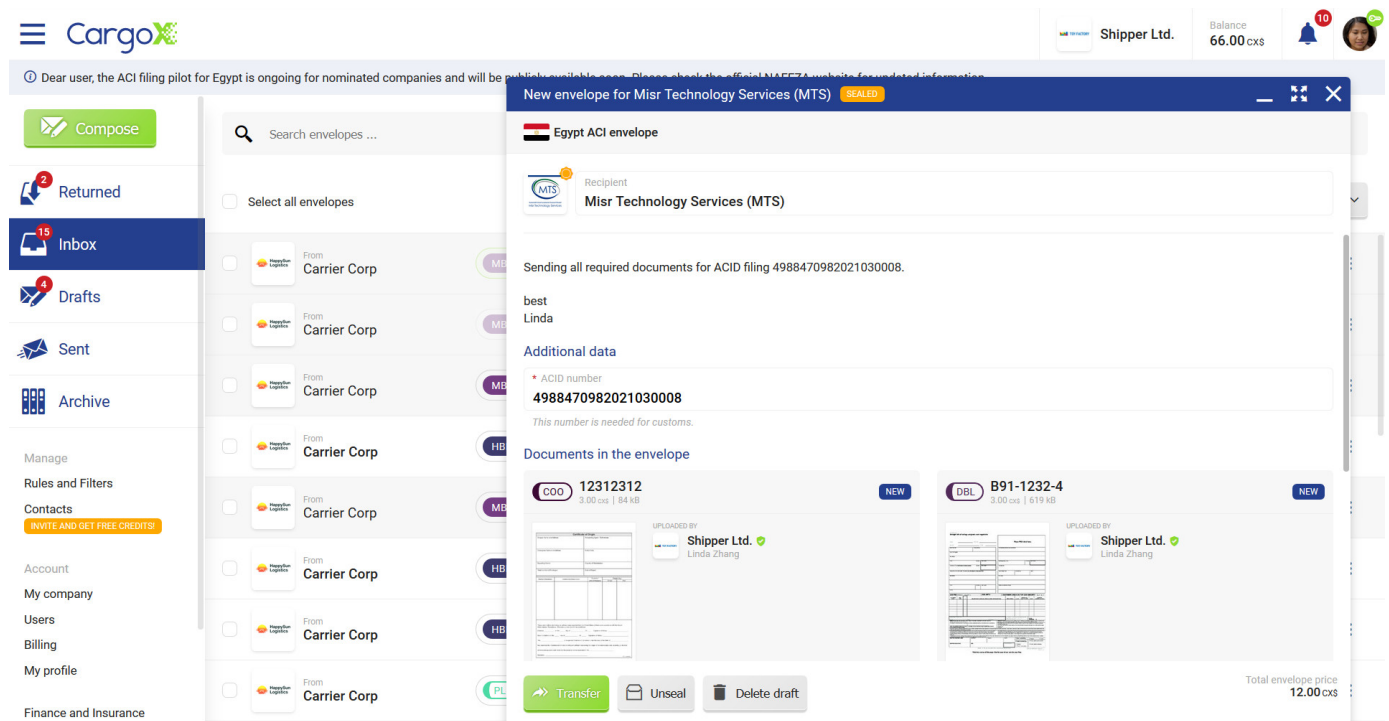
## Note

The **Seal** button is only active (orange), if all the attached documents have their mandatory fields filled.

## Step 9: Transfer the envelope

Once ACI envelope is sealed, you can transfer it with the click on the green **Transfer** button.

Transferring the ACI envelope is exactly the same as transferring a standard digital envelope on the CargoX Platform. For the step-by-step tutorial visit transferring the envelope.



## Frequently Asked Questions

FAQ for the CargoX Platform (3rd Generation - 2020-2021)

### What is CargoX?

#### Digital courier service

**CargoX is a digital courier service. We are making sending physical paper documents obsolete. Blockchain enables us to know which digital documents are originals and who owns them. Only the owner of a document can transfer possession of it to recipient. Sending originals around the world with CargoX takes seconds and is much safer and cheaper.**

CargoX, an independent supplier of public-blockchain-based solutions was established in January 2018, crowdfunded by over 2000 individuals from 95 countries, and currently (2020) employs around 15 people.

In April 2018 a MVP was introduced to public at the International Logistics Conference late and beta testing began. In H2 2018 CargoX launched its first generation platform into full production, focused on sea freight and documents of title, such as Bills of Lading...

At the beginning of 2019 CargoX v2 platform Smart B/L v2 launched with simplified user interface and support for 10 documents frequent in maritime transport and documentary credits (Letter of Credit). Customer feedback was overwhelmingly positive, but everyone wanted to use solution for other modalities transport documents and also for non-transport documents.

Early 2020 CargoX presented Generation 3 of the platform, now called just The CargoX Platform. Platform is universal and completely flexible, supporting over 50 types of documents for all industries!

CargoX continues to provide a fast, safe, and reliable transfer of paperless and contactless digital originals and other digital documents.

CargoX leverages the security and decentralization of the permissionless, public blockchain and smart contracts.

To learn more about CargoX, please visit <https://cargox.io>

## ***Why is the CargoX Platform more secure than any existing solution?***

### ***Why is the CargoX Platform secure?***

The modular structure of the CargoX Platform is without any single point of failure. That essentially means that there is no central server or central storage to be targeted by hackers.

The security and safety of our smart contracts is assured through vetting and auditing. All production-ready CargoX smart contracts have been vetted by at least one independent auditing expert.

Additionally, clients can at any time request additional audit of our entire deployed smart contract code, provided that they cover the costs and select a recognized, independent, auditing professional.

Secured and vetted smart contracts combined with the vast processing power that secures the consensus mechanism of the world's largest public blockchain - Ethereum, further underline the significant security of the CargoX ecosystem.

CargoX has a dedicated bug bounty program, stimulating researchers and white hat hackers to inspect our code and report any found weaknesses.

CargoX's smart contracts and ecosystem as a whole are written by a team of experienced in-house developers and software engineers, using only the most secure and vetted libraries, with an emphasis on clear logic and simplified flow. The same libraries are also used in core Ethereum blockchain development, meaning they are inspected and scrutinized hundreds of times every day by the largest blockchain development community on the planet.

On the contrary, proprietary software teams generally consist of fewer people and don't always include necessary specialists, such as QA engineers, who help eliminate vulnerabilities. With proprietary/closed software solutions you have no option but to trust the vendor.

### ***Who can see your documents***

The only users who can see your CargoX documents, are you and other parties included in the exchange.

For a simple Smart B/L those are typical: the issuer, the shipper, the consignee(s), and the cargo release agent. Nobody else but these four parties can access the document. Not even CargoX.

As an additional precaution, all documents stored on the decentralized file storage of the CargoX are always encrypted.

The identity of users is obfuscated by their Ethereum address, and again only parties included in the document exchange know and see each other address.

### ***How CargoX guarantees ownership of documents***

Your digital documents are encrypted and stored securely on the IPFS file system. The ownership information along with the hash (digital fingerprint) of each document is written on the Ethereum blockchain network.

Documents are accessible only through the owner's' private blockchain key, which CargoX never sees.

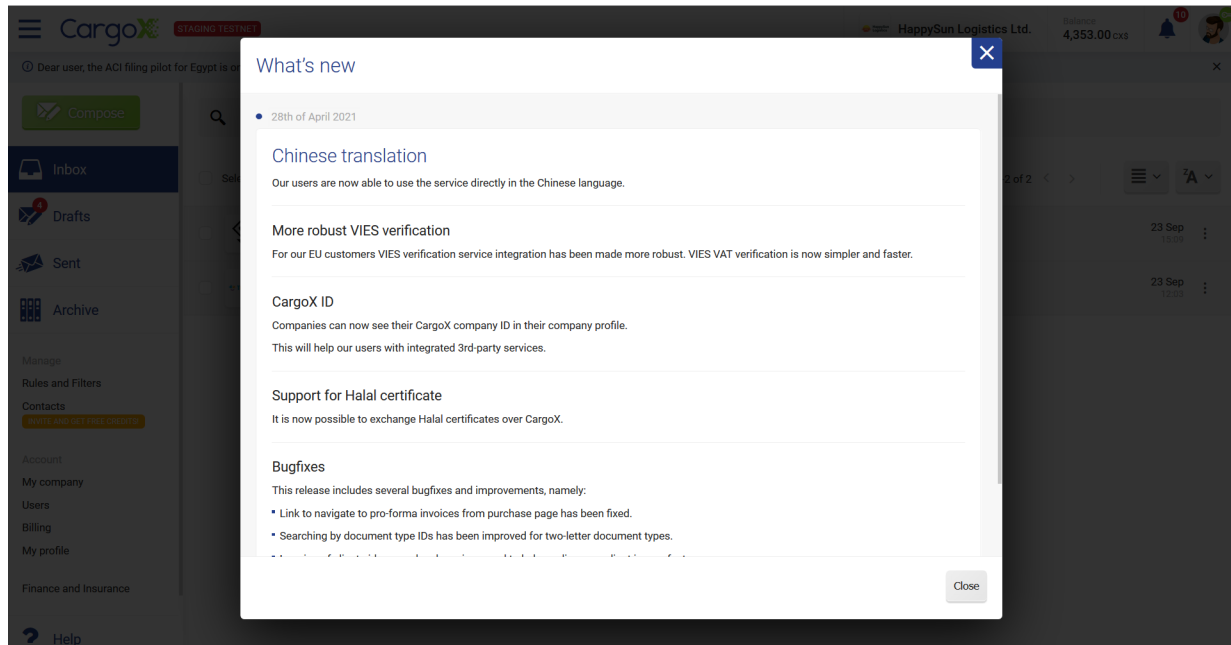
Documents uploaded to the CargoX Platform can never be lost or stolen. The Ethereum blockchain and all parts of the CargoX Platform employ the most advanced cryptography, providing military-grade security.

## CargoX Platform Release Notes

**CargoX Platform is a live, actively developing project.**

Major features are added quarterly, with smaller improvements and bug fixes added on a weekly base.

If CargoX Platform was updated since your last login, you will see the **What's new** information after you successfully enter the system. We are continually enhancing the platform, adding new features and new languages.



To learn more about CargoX, please visit <https://cargox.io>

## CargoX Platform Legal Terms & Conditions

**To use the CargoX Platform you have to agree with two legal documents:**

1. General terms and conditions (available at <https://cargox.io/terms-and-conditions/>)
2. Special terms and conditions (available once you are logged into your CargoX account - <https://cargox.digital/terms-and-conditions>)

## What is a Smart Contract?

Smart contract is a distributed computer program residing on the blockchain that will execute itself when special conditions on the blockchain are met.

Smart contracts can be seen as a service-providing infrastructure, and every blockchain based application (distributed application - dApp) has a smart contract powering it in the background.

End users can use existing smart contracts; they do not need to deploy a new smart contract every time they need it (as opposed to the real world, where you would need to sign a new contract between two parties and could not use a public “template”).

Since smart contracts are deployed on the blockchain, they are by design unchangeable.

**Let's illustrate on an example:**

Using a smart contract, a father could create a program that withdraws funds from his account and deposits them to his child's account, if and when the child's balance falls below a certain level. In theory smart contracts can be used to program all kinds of financial or business agreements, from auctions and escrows to the handling of tokenized digital assets

## ***What is Blockchain?***

### ***Attention!***

To help you understand the blockchain technology better, you might want to watch a few youtube video explainers. One of the better ones was made by European Blockchain Services Infrastructure (EBSI): [tutorial video](#).

Blockchain is a technology that allows secure exchange of value. We use it to manage the ownership of digital documents of value and other digital assets. Blockchain transfer is especially useful where digital assets frequently change their owners, like in with business, trade and transport documentation.

The big advantage of blockchain against other technologies is, that it is practically impossible to change history of transactions, which prevents fraud and provides a mechanism to recognize authentic original documents.

Highlights of numerous advantages over any centralized system are also complete transparency and protection against fraud. Because there is no need to trust any individual organization or company (not even CargoX) there can't be any abuse of trust. Decentralization of the Ethereum means there is no single central authority, which makes public blockchain a perfect and the only viable tool for the global trade and global document exchange.

Ownership of digital documents can be transferred in mere seconds regardless of whether transfer is regional or transatlantic.

While logistics and supply chain is an ideal area for use of the public blockchain technology, CargoX's technology to transfer documents is universal, supporting all modalities and industries.

Blockchain is especially suiting for tracking the origin of documents, their authenticity and each and every transfer of ownership between parties. This prevents counterfeiting and offers the same properties as physical paper documents have. Permanently storing all transactions creates a powerful audit log, offering a new insight into the transparency, one that even customs authorities are recognizing.

CargoX uses the most advanced and fastest-developed blockchain on the planet - the public, open-source blockchain called Ethereum. Numerous corporations have chosen Ethereum as their blockchain of choice, and it comes as a no surprise, that Ethereum has the largest developer community worldwide.

## ***How to approach your business and transport partners regarding CargoX?***

You can send fax only to someone with a fax machine. Same applies in the blockchain era. In order to use CargoX Platform to digitally transfer original documents, the other party also needs to have a CargoX account. Luckily, creating a CargoX account is free of charge and takes only 5 minutes. But how to explain everything to your partners?

### ***How to approach them?***

**Email or call them first**, and explain why your company decided to start using CargoX. In the 2020's the reasoning is very easy:

1. Your company wants to return to pre-COVID "normal" operations but physical document delivery with couriers is sometimes/somewhere still interrupted...
2. You don't want to get your employees exposed to anything that might come with the paper...
3. Due to quarantines/lockdowns most of your team works from home anyhow...
4. Email is not safe, and there is no way you can send valuable document of title through it + other parties will not accept such document...

## ***What to tell about CargoX?***

Just tell your partner that you will send them an email that will explain this CargoX and what it is all about, so they can have internal discussion.

Also tell them that you will send them a link to check out the platform - free of charge and without any obligations or risk for them.

If they ask more about CargoX, here is something you can tell them:

The **CargoX Platform** enables you to send and receive digital documents. It preserves all the properties of paper original documents. You will be able to **transfer ownership** of documents and identify **originals**. The CargoX Platform is available worldwide, very **simple to use**, much **safer** and **faster** than traditional express courier delivery services. Best of all you can register account free of charge, and there is no upfront payment.

### Action items

1. Send them an introductory email! We have prepared several email samples. For the best impact use your official document template, add your own story/experience using CargoX and ask your executive to sign and send it:
  - For Supplier/Exporter (**COVID-19-era version with added urgency**)
  - Universal approach (**simulated exchange of a past document for POCs encouraged by the Indian government**)
  - **For Customer/Importer**
  - **For Freight Forwarder/NVOCC**
  - **For Carriers/VOCC**
2. Login to your CargoX account, and from Contacts, send an Invite to your partner's email address (send to only one person at company - after the registration they can create accounts for their co-workers).
3. If they contact you back with hard questions, connect them with us, and we will gladly answer any questions they might have and can also organize a conf call with a live demo. CargoX also offers assistance in the onboarding and use of the platform free of charge.

Please share feedback with your CargoX rep or with business development team at CargoX ([sales@cargox.io](mailto:sales@cargox.io)). We are ready to assist you in case of any questions.

### For Supplier/Exporter (COVID-19)

Dear business partner,

we are currently addressing our **top priority goal** - return to normal operation. Therefore we are **enforcing paperless exchange of documents**. We would appreciate if you, our valued business partner, would join us in this process.

We chose the CargoX Platform which preserves all the properties of physical paper documents - allows **transfer of document ownership** and identify **originals**. The CargoX Platform has all the necessary features that we both need:

- **digitization** (no physical paper to expose to, work from home or anywhere, 10-years of document storage, automation possibilities thru API)
- **security and safety** (encrypted data; no lost, stolen, damaged or forged documents)
- **audit log** (full visibility, identify original documents, document ownership transfer)
- **cost reduction** (no express courier delivery costs, work process optimizations, no licensing, no upfront costs, no implementation costs)
- **fast delivery** (documents will be delivered in a matter of minutes worldwide)
- **no intermediaries** (documents are sent in a P2P fashion directly between users)

CargoX is the only neutral and independent digital courier, facilitating **instant transfer of digital original and other digital documents** including Bills of Lading, Certificates of Origin, Letters of Credit and 50+ others - **working world-wide**.

More details are available on <https://cargox.io>.

You will shortly receive an invitation to connect with us over the CargoX Platform. Use the link in that email to create your company's CargoX account for free. registration process takes 5-minutes.

As part of our agreement with CargoX, you are entitled to full support with account creation and use of the platform. If you have questions contact CargoX at [support@cargox.io](mailto:support@cargox.io).

### ***Simulated exchange of past document***

Dear XXXXXXXXXX,

I hope everything is OK at your side, with team XXXXXXXXXX.

At XXXXXXXXXX we always try to bring to the table innovative solutions for our clients, and partners. We are heavily exploring the latest digital alternatives to handle our business more efficiently.

That's why we have partnered up with CargoX to improve the bill of lading process.

We would like to do a simulation of a past shipment by putting the Bill of Lading in the platform and recreate the workflow of Issuer-Shipper-Consignee-ReleaseAgent.

After the simulation, we would like this process to be the standard for BL transfer of ownership.

We have chosen you because we are working closely with the Indian Government in this pilot and they asked us if we have some partners in India that would like to be a part of this pilot. The intentions from the Indian Government are to advertise heavily this pilot and promote this digital solution for the industry as a safer alternative than paper and courier dependent workflows in a post-Covid-19 era.

Therefore, let me introduce you to our partners at CargoX who are included in this email, and who will follow up with next steps:

Vjeran Ortynski - Chief Business Development Officer

Jaka Mele - Chief Digital Officer

Please note that the deadline from the Indian Government is end of this week and we would really appreciate your collaboration in this matter and it will only take a few minutes.

Let me know if you have any questions.

Best regards,

## **Indices**

- **genindex**
- **search**