

CargoX Connecting with Other Companies

version Version 3

CargoX

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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.

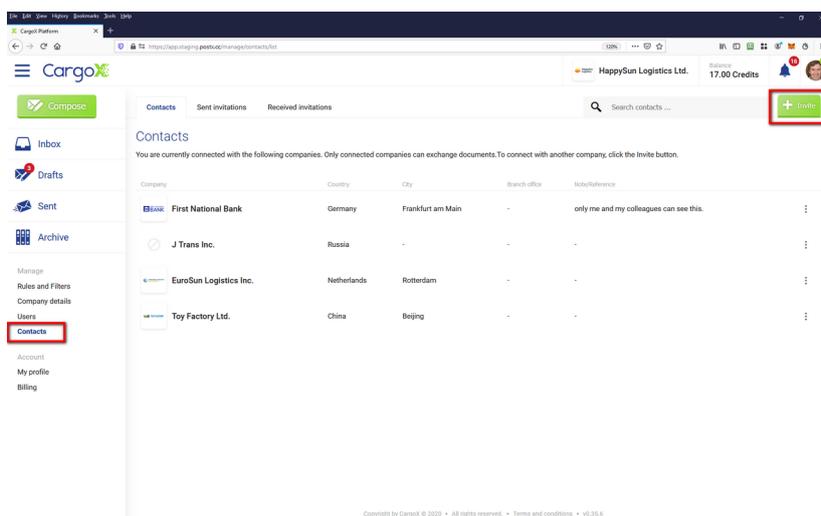
Attention!

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**.

Send an invite to connect

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.

Compose

Contacts Sent invitations Received invitations

Search received invitations ...

Invite

Received invitations

This is a list of customers that you already invited and who still haven't responded to your invitation.

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

Send an invite to connect

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.