

CargoX Creating User Accounts for Co-Workers

version Version 3

CargoX

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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**.

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The screenshot displays the CargoX web application interface. At the top left is the CargoX logo. The top right shows the company name 'Toy Factory Inc.' with a green checkmark, a balance of '790.00 Units (U)', and notification icons. The left sidebar contains a navigation menu with items: 'Compose' (green button), 'Inbox', 'Drafts' (with a red '2' badge), 'Sent', 'Archive', 'Manage', 'Rules and Filters', 'Contacts', 'Account', 'My company' (with a red box around it), 'Users' (with a red box around it), 'Billing', 'My profile', and 'Finance and Insurance'. At the bottom of the sidebar is a 'Help' link with a question mark icon. The main content area features a search bar for envelopes, a 'Select all envelopes' checkbox, and a message stating 'There are currently no received envelopes in your Inbox.' There are also settings and sort order icons in the top right of the main area.

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.

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The screenshot displays the CargoX user management interface. At the top, the company name 'Toy Factory Inc.' and a balance of '790.00 Units (U)' are visible. The main navigation sidebar includes options like 'Compose', 'Inbox', 'Drafts', 'Sent', 'Archive', 'Manage', 'Rules and Filters', 'Contacts', 'Account', 'My company', 'Users', 'Billing', 'My profile', and 'Finance and Insurance'. The 'Users' section is active, showing a search bar and a table of users. A red box highlights the '+ Add user' button in the top right corner of the 'Users' section.

User	Email	Phone number	Password	Blockchain ID	Last login	Permissions
Linda Zhang you	j_mele+staging@cargox.io	123456789	Enabled	Blockchain key 0x056E8ac125C9085309c9B35946864cDB47587199	16 Oct 2021 at 12:04 9 minutes ago via Password	Administrator (all)

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. If you have users from many departments and/or branches using the same company account, you might want to set up departments - this will allow you to receive per department report on spent units. More about **setting up user departments** can be read here.

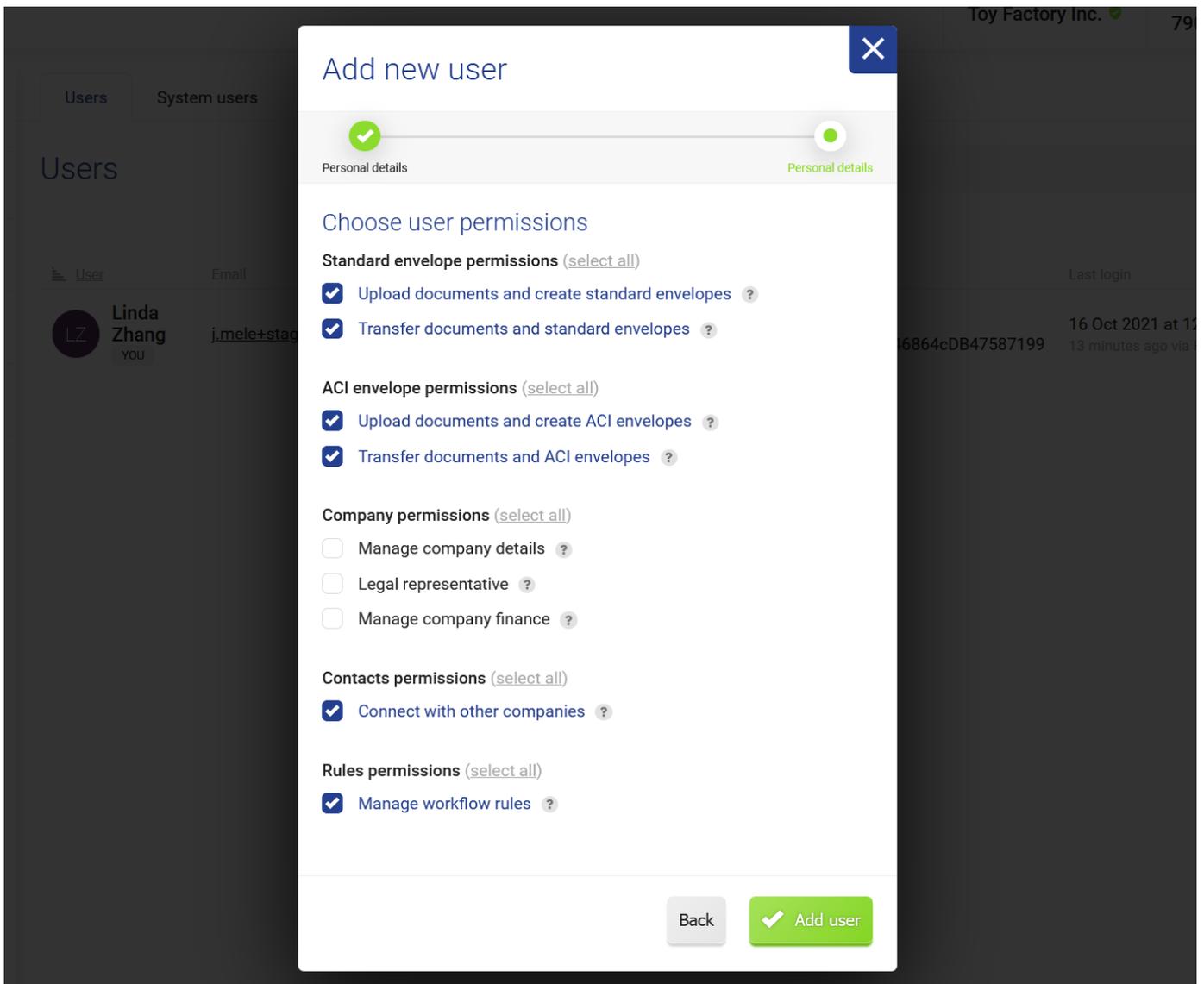
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The screenshot shows a modal window titled "Add new user" with a close button (X) in the top right corner. The form is divided into two tabs: "Personal details" (active) and "App permissions". Under "Personal details", there is a profile picture placeholder with a camera icon. Below it are several input fields: "First name" (Michael), "Last name" (Bolton), "Email" (bolton@toystore.com), and "Phone number" (123456789). There is also a dropdown menu for "Department / Branch (optional)" with a link "Add new department" below it. A "Position / Title (optional)" field is also present. At the bottom of the form, there is a checked checkbox for "Declaration of Authorisation. We hereby authorise Michael Bolton to act on our behalf on CargoX platform." and two buttons: "Close" and "Next".

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

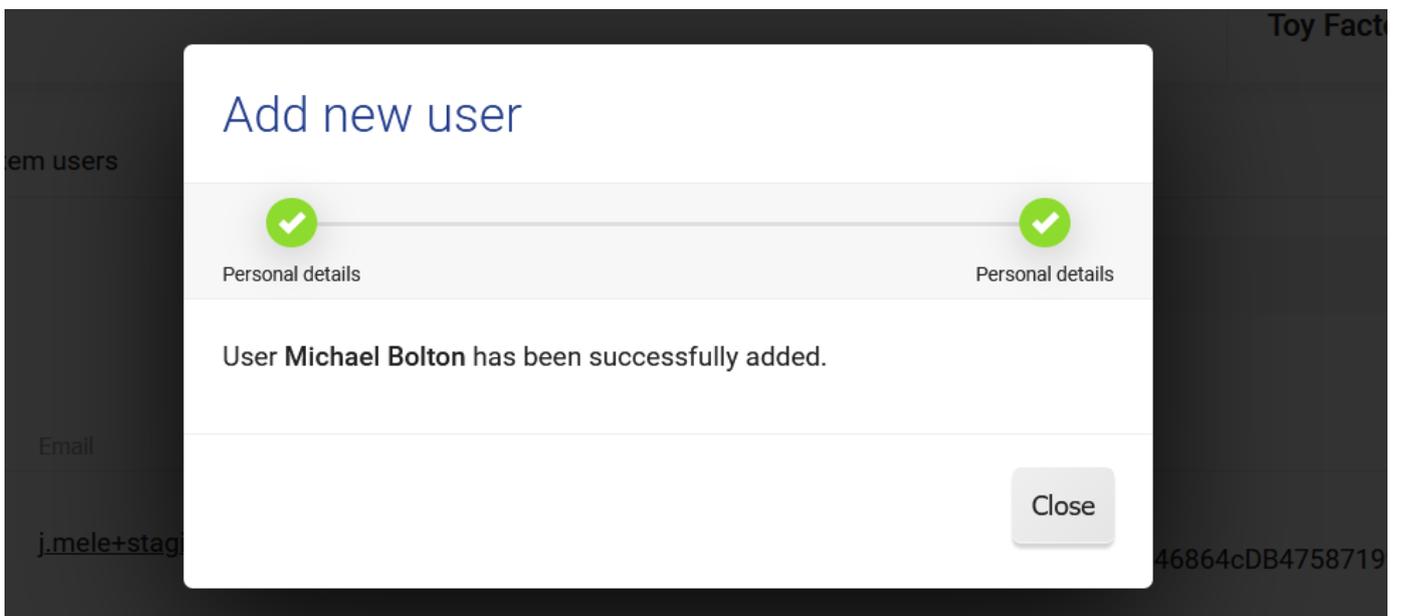
Select the permissions (access rights) the user will have. You can use the **Select all** button to select all permissions. Click here for a [detailed explanation of permissions](#). We suggest that you start with giving users full permissions, and then narrow them down if needed later on (read [how to manage users](#)).

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

Step 5: Instructions for the user



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Process is complete. You can now close the window. 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 shows the CargoX platform interface. The top navigation bar includes the CargoX logo, the company name 'HappySun Logistics Ltd.', and a balance of '683.80 Credits'. The left sidebar contains navigation options like 'Compose', 'Inbox', 'Drafts', 'Sent', 'Archive', 'Manage', 'Rules and Filters', 'Company details', 'Users', 'Contacts', 'Account', 'My profile', and 'Billing'. The main content area is divided into 'Users' and 'System users' sections. The 'Users' section shows a list of users, including 'John Campbell' (you) and 'Second User'. The 'Second User' profile is selected, and the 'Privacy & Security' tab is active. The 'Blockchain keys' section displays a table of keys with columns for 'Public address', 'Key type', 'Date added', and 'Status'. The 'Status' column shows 'Active', 'CURRENTLY UNLOCKED', and 'Pending approval'. A red box highlights the 'Approve' button next to the 'Pending approval' key.

Public address	Key type	Date added	Status	Action
0xCc54DD4f4D079524A1C417bC2E2c2530179c6337	Metamask	6 Apr 2020 at 12:06 11 days ago	Active	Disable
0xc1B8C5fFe3e21060d6Bd23e331043d8F02a560dA	Private Key	5 Apr 2020 at 06:56 12 days ago	Active CURRENTLY UNLOCKED	Disable
0x061aF1dFC76F0fd140215fbcc8Dab88407fb67E	Keystore File	12 Apr 2020 at 15:14 5 days ago	Active	Disable
0x1c4FE6B7F0956d6d51A29C057738823DD1Cb242	Metamask	6 Apr 2020 at 23:40 11 days ago	Pending approval	Approve
0x66750E050dBB8c597972e27F8b7A3B6C45b99C4c	Ledger Hardware Wallet	6 Apr 2020 at 00:07 11 days ago	Active	Disable
0x4350ccf199c336d46701E099AF554d4f923565082	Trezor Hardware Wallet	6 Apr 2020 at 01:53 11 days ago	Active	Disable