ENTERPRISE PLATFORM · USER GUIDE

My Cargo Agent

Complete User & Feature Reference

Version 1.0 · August 2026

- Full multi-company freight management platform
- End-to-end shipment creation, tracking & billing
- Automated communications — Email, SMS & WhatsApp
- Customer self-service portal & public tracking
- Powerful reporting, analytics & REST API access

My Cargo Agent
mycargoagent.com
Confidential — For authorised users only

User Types Covered:
Freight Agent Admin · Staff
Customer Portal · Public

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CHAPTER 1

Introduction & Platform Overview

A comprehensive introduction to the My Cargo Agent platform and its capabilities.

1.1 What is My Cargo Agent?

My Cargo Agent (MCA) is a fully-featured, cloud-based freight management platform designed to streamline every aspect of your logistics operations — from booking shipments and tracking cargo to invoicing customers and analysing business performance.

Built on a modern multi-company architecture, MCA enables multiple freight companies (freight agents) to operate independently on the same platform, each with their own branding, customers, data, and pricing rules — with full isolation between freight agents.

> **PLATFORM ARCHITECTURE**
>
> MCA runs as a multi-company SaaS application. Each freight company (freight agent) has a completely isolated environment. Data from one freight agent is never visible to another. The Super Admin manages the entire platform from a separate, elevated dashboard.

1.2 User Types

MCA supports four distinct user types, each with tailored access and capabilities:

User Type	Login URL	Primary Role
Freight Agent Admin	/login	Full access to their company's MCA account — all modules
Staff Member	/login	Operational access — shipments, customers, communications
Customer (Portal)	/portal	Self-service view of their own shipments, invoices, and tracking
Public	/track	No login — track a shipment using a tracking number or reference

1.3 Key Platform Features

Shipment Management

5-step wizard to create air and sea freight shipments with full details, documents, and tracking timeline.

Billing & Invoicing

Auto-generated invoices per shipment with branded PDF export, payment recording, credit notes, and ageing reports.

Customer CRM

Full customer profiles with shipment history, invoice history, activity log, and self-service portal access control.

Pricing Rules Engine

Configurable rate tables by origin/destination zone and service type, with surcharges, effective date ranges, and a test calculator.

Communications Suite

Send emails and SMS to customers. Rich template library with dynamic variables. Full send log with retry capability.

Reports & Analytics

Shipment volume, revenue, and ageing receivables reports with date-range filters, charts, and CSV export.

Customer Self-Service Portal

Branded portal login for customers to view their shipments, download invoices, and track cargo in real time.

Public Tracking Page

No-login tracking page for anyone with a tracking number or shipment reference.

REST API

Full JSON API with Bearer token authentication for integration with third-party systems, ERPs, and warehousing platforms.

Two-Factor Authentication

Optional TOTP-based 2FA for all freight agent users and mandatory 2FA for Super Admin access.

CHAPTER 2

Getting Started

How to log in, set up security, and navigate the platform.

2.1 Logging In

Open your web browser and navigate to your MCA instance URL (e.g. `https://mycargoagent.com/btd-app/login`). Enter your registered email address and password.

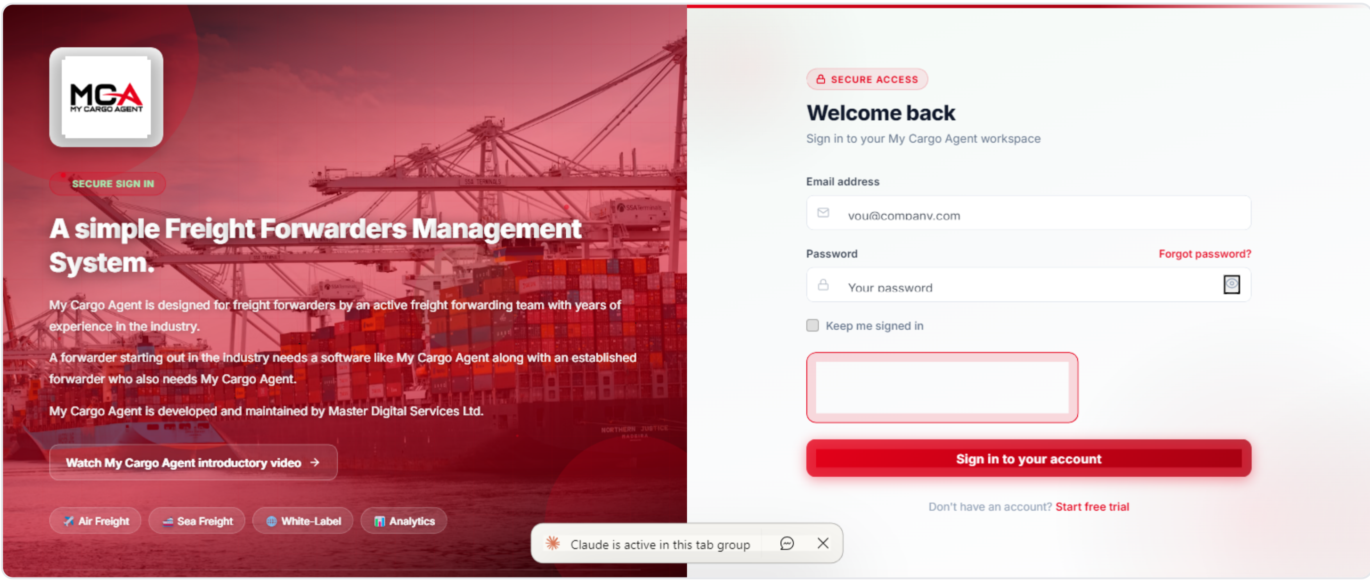

Figure 2.1 — The MCA login page with email and password authentication.

> **FIRST LOGIN**
>
> On first login you will be prompted to verify your email address. Check your inbox for a verification link. You will not be able to access the main application until your email is verified.

> **FORGOT PASSWORD**
>
> Click **"Forgot your password?"** on the login page. Enter your email and you'll receive a password reset link within a few minutes.

2.2 Two-Factor Authentication (2FA)

MCA supports TOTP-based two-factor authentication (compatible with Google Authenticator, Authy, and similar apps) to add an extra layer of security to your account.

1

Enable 2FA: Go to your account menu (top-right) → *Two-Factor Authentication* → click *Enable 2FA*.

2

Scan QR code: Open your authenticator app and scan the QR code displayed on screen.

3

Confirm: Enter the 6-digit code from your app to confirm setup. Save your recovery codes in a secure location.

4

Subsequent logins: After entering your email and password, you'll be prompted for your current 6-digit 2FA code.

> **RECOVERY CODES**
>
> MCA generates 8 one-time recovery codes when you enable 2FA. Store these securely — if you lose access to your authenticator app, recovery codes are the only way to regain access.

2.3 The Dashboard

After logging in, you land on your company dashboard. This is your operational command centre, giving you a real-time view of your business.

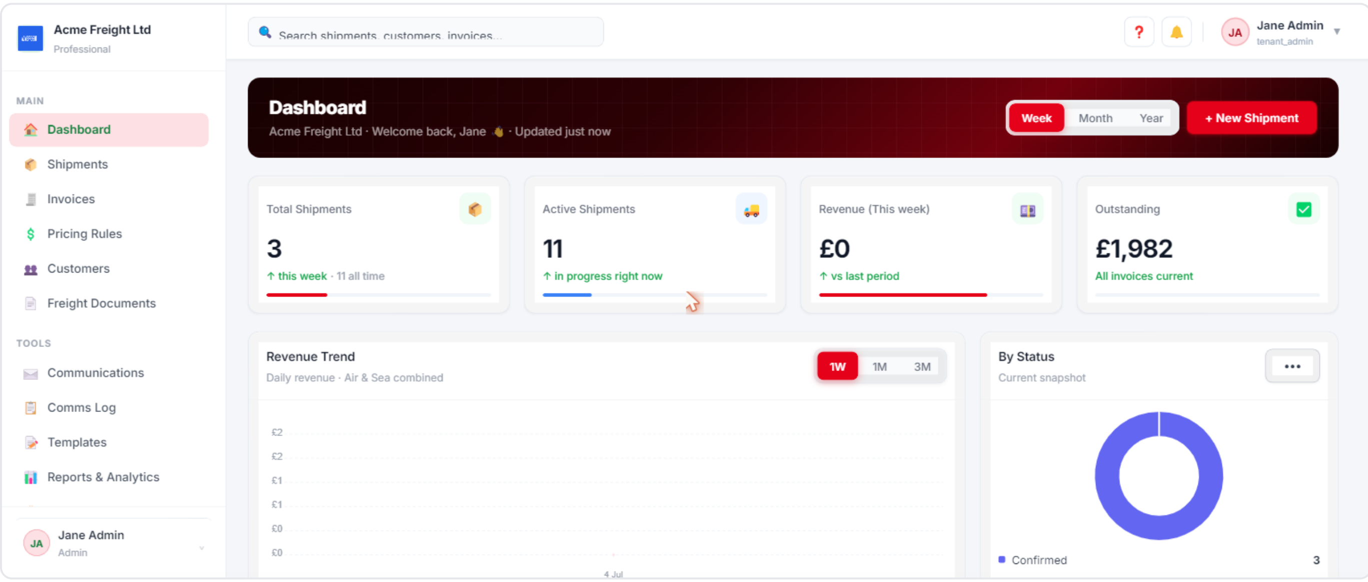

Figure 2.2 — The freight agent admin dashboard showing KPI cards, revenue trend, and shipment status breakdown.

The dashboard displays:

- **KPI Cards** — Total Shipments, Active Shipments, Revenue (period), and Outstanding Invoices
- **Revenue Trend Chart** — Daily revenue over 1 week, 1 month, or 3 months
- **Shipments by Status** — Doughnut chart of current shipment statuses
- **Recent Shipments** — Latest shipment activity with quick-access links
- **Recent Payments** — Latest recorded payments

- **Overdue Alerts** — Highlighted overdue invoices requiring attention

2.4 Navigation

The left sidebar provides access to all platform modules. The sidebar can be collapsed to a compact icon-only view on smaller screens. The top bar includes a global search (Ctrl+K), notifications bell, and your account menu.

Sidebar Section	Modules
MAIN	Dashboard, Shipments, Billing (Invoices), Pricing Rules, Customers
TOOLS	Communications, Comms Log, Templates, Reports & Analytics, API Access
ACCOUNT	User menu — Profile, Settings, 2FA, Sign Out

CHAPTER 3

Shipments

Create, manage, and track all your freight shipments from a single, powerful interface.

3.1 Shipments List

Navigate to **Shipments** in the sidebar to view all your shipments. The list is fully searchable and filterable.

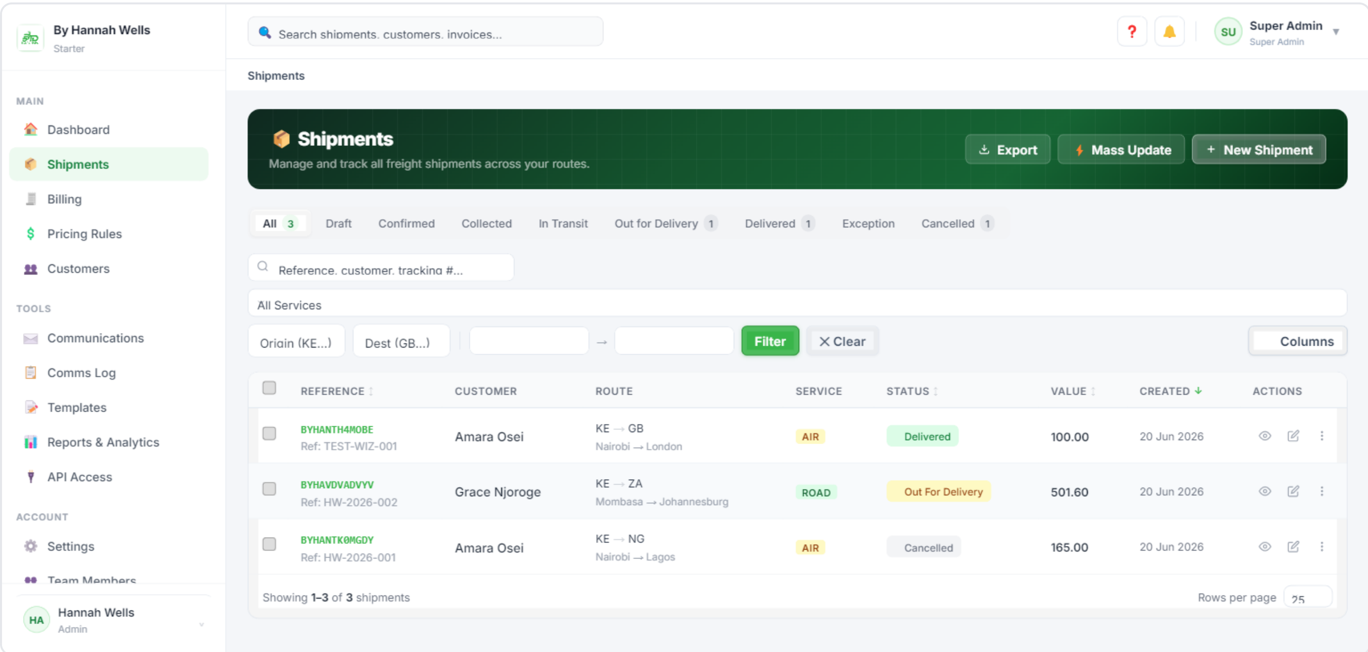

Figure 3.1 — The shipments list with status tabs, search, and filter controls.

Filtering & Searching

- **Status tabs** — All, Active, In Transit, Out for Delivery, Delivered, Exception, Cancelled
- **Search bar** — Search by tracking number, reference, customer name, or consignee
- **Date range** — Filter by booking date or expected delivery date
- **Service type** — Filter by Air Freight, Sea Freight (FCL/LCL), Road, or Courier
- **Origin / Destination** — Filter by country

Bulk Actions

Select multiple shipments using the checkboxes to perform bulk actions: mass status update, bulk export (CSV), or bulk communication send.

3.2 Creating a New Shipment

Click **+ New Shipment** (top-right of dashboard or shipments list). This launches a 5-step wizard:

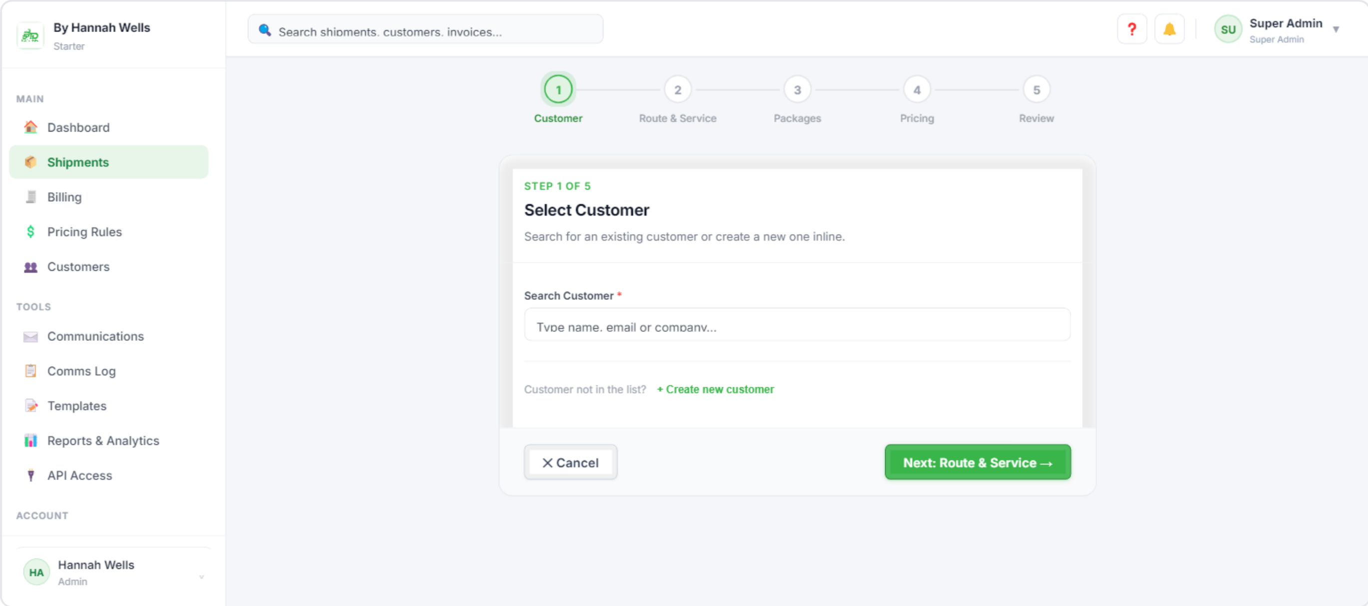

Figure 3.2 — Step 1 of the New Shipment Wizard: Customer selection.

1

Customer: Search and select the customer. Choose from existing customers or add a new one on the fly. Set origin and destination countries.

2

Cargo Details: Enter service type (Air/Sea/Road/Courier), cargo description, weight, dimensions, volume, and number of pieces.

3

Routing: Add origin and destination port/address details, expected pickup date, and estimated delivery date.

4

Pricing: Apply a pricing rule (auto-calculated from origin/destination/weight) or enter a manual rate. The system displays base rate, surcharges, and total.

5

Review & Confirm: Review all details. A system-generated tracking number (e.g. BYHANTH4MOBE) is assigned automatically. Confirm to create the shipment and auto-generate an invoice.

> **AUTO-INVOICE CREATION**
>
> When you confirm a new shipment, MCA automatically creates a draft invoice using your pricing rule total. The invoice can be reviewed, adjusted, and sent from the Billing module.

3.3 Shipment Detail

Click any shipment in the list to open its detail view. This is the central hub for everything related to that shipment.

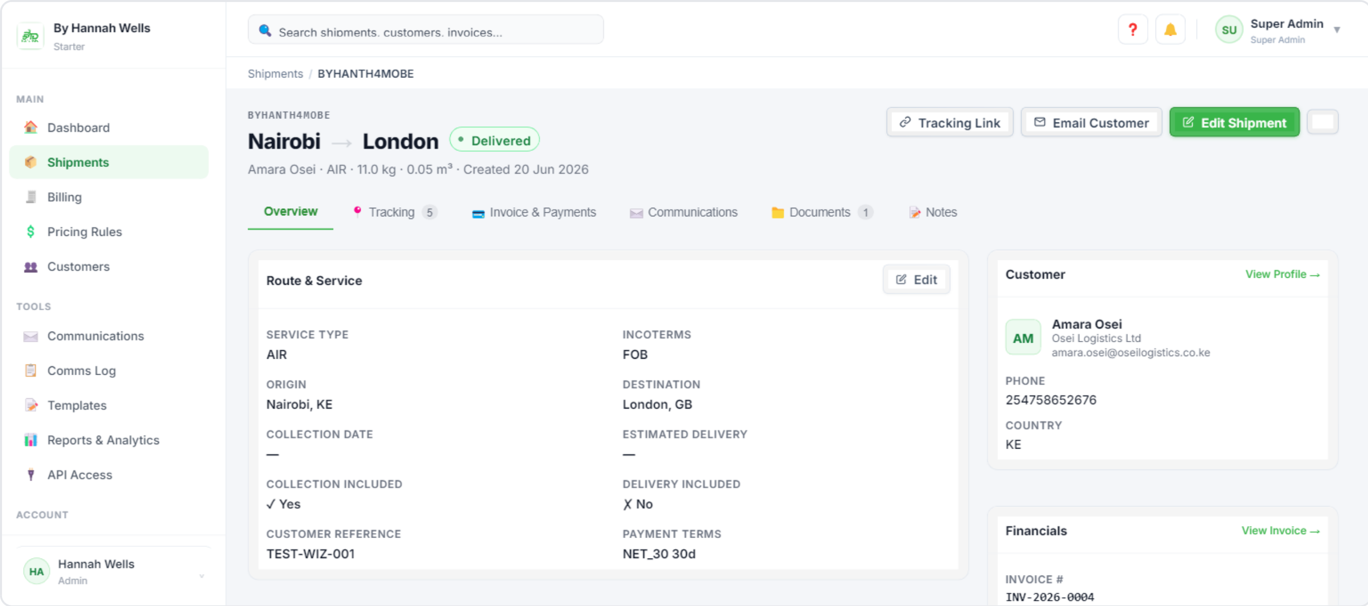

Figure 3.3 — Shipment detail showing tabs: Overview, Tracking, Invoice & Payments, Communications, Documents, and Notes.

The shipment detail page has six tabs:

Tab	Contents
Overview	Shipment summary: status, route, cargo details, customer, pricing breakdown
Tracking	Visual timeline of all tracking events, from pickup to delivery. Add events with timestamps.
Invoice & Payments	Linked invoice(s), payment history, outstanding balance, record payment button
Communications	All emails and SMS sent to the customer for this shipment
Documents	Upload and manage shipment documents: Bill of Lading, AWB, Packing List, Certificate of Origin, etc.
Notes	Internal notes visible only to your team. Timestamped with author.

3.4 Tracking & Status Updates

Shipment status flows through a defined lifecycle. Each status change is logged in the tracking timeline with a timestamp and optional note.

Status	Meaning
Booked	Shipment created, awaiting pickup
In Transit	Cargo is moving between origin and destination
Out for Delivery	Final-mile delivery in progress

Delivered	Successfully delivered to consignee
Exception	Issue encountered (customs hold, damage, wrong address)
Cancelled	Shipment cancelled before completion

Adding a Tracking Event

1

Open the shipment → **Tracking** tab → click **Add Event**.

2

Select a new status, enter location, date/time, and an optional note.

3

Click Save. The tracking timeline updates instantly and a customer notification can optionally be triggered.

Billing & Invoices

Complete invoice lifecycle management — from auto-generation to payment collection and financial reporting.

4.1 Invoice List & Filters

Navigate to **Billing** in the sidebar to view all invoices. The list shows invoice number, customer, amount, outstanding balance, status, and due date.

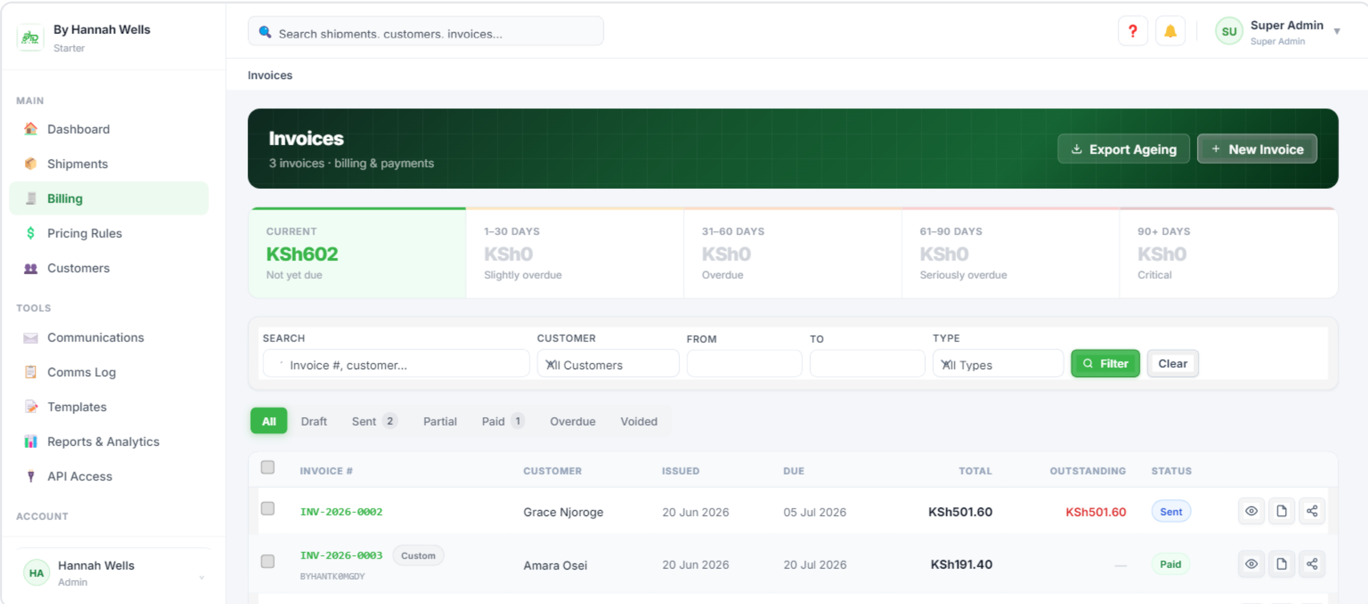

Figure 4.1 — The invoices list with status filter tabs and ageing report.

Invoice Status Tabs

Status	Description
Draft	Invoice created but not yet issued to the customer
Sent	Invoice has been emailed to the customer
Partial	Partially paid — some balance remains outstanding
Paid	Fully paid, no outstanding balance
Overdue	Past due date with outstanding balance
Void	Invoice has been voided (cancelled)

Ageing Report Tab

The **Ageing** tab shows all outstanding invoices grouped by age bucket: Current, 1–30 days, 31–60 days, 61–90 days, and 90+ days. Export to CSV for your accounts team.

4.2 Invoice Detail & PDF Export

Click any invoice to open the full detail view. The invoice displays your company branding (logo, colours, address) alongside line items, tax breakdown, and payment terms.

Branded PDF Download

Click "Download PDF" to generate a professional branded invoice PDF ready to send or print.

Send by Email

Click "Send Invoice" to email the invoice directly to the customer with a customisable cover message.

QR Code

Each PDF invoice includes a QR code linking to the customer portal for easy self-service payment tracking.

Payment History

All recorded payments are listed with date, amount, method, and reference number.

4.3 Recording Payments

1

Open the invoice → click **Record Payment**.

2

Enter: Payment amount, date, method (Bank Transfer, Cash, Cheque, Card, Other), and an optional reference.

3

Click Save. If the payment equals the outstanding balance, the invoice status updates to **Paid** automatically.

PARTIAL PAYMENTS

Multiple partial payments are supported. Each payment is logged separately, and the remaining balance is tracked. The invoice status shows **Partial** until fully settled.

4.4 Credit Notes & Voids

Credit Notes reduce the outstanding balance on an invoice. They are useful for adjustments, discounts applied after invoicing, or returning overpayments.

Voiding an invoice marks it as cancelled. Void invoices remain in the system for audit purposes but are excluded from all financial reports. Void cannot be undone.

> **INVOICE NUMBER FORMAT**
>
> Invoice numbers follow the format configured in Settings → Invoice Format (e.g. `INV-2026-001`). The prefix, separator, and number padding are all configurable.

Customer Management

Manage your entire customer base with CRM-grade profiles, history, and self-service portal access.

5.1 Customer List

The **Customers** module provides a centralised view of all your customers with search, filters, and bulk actions.

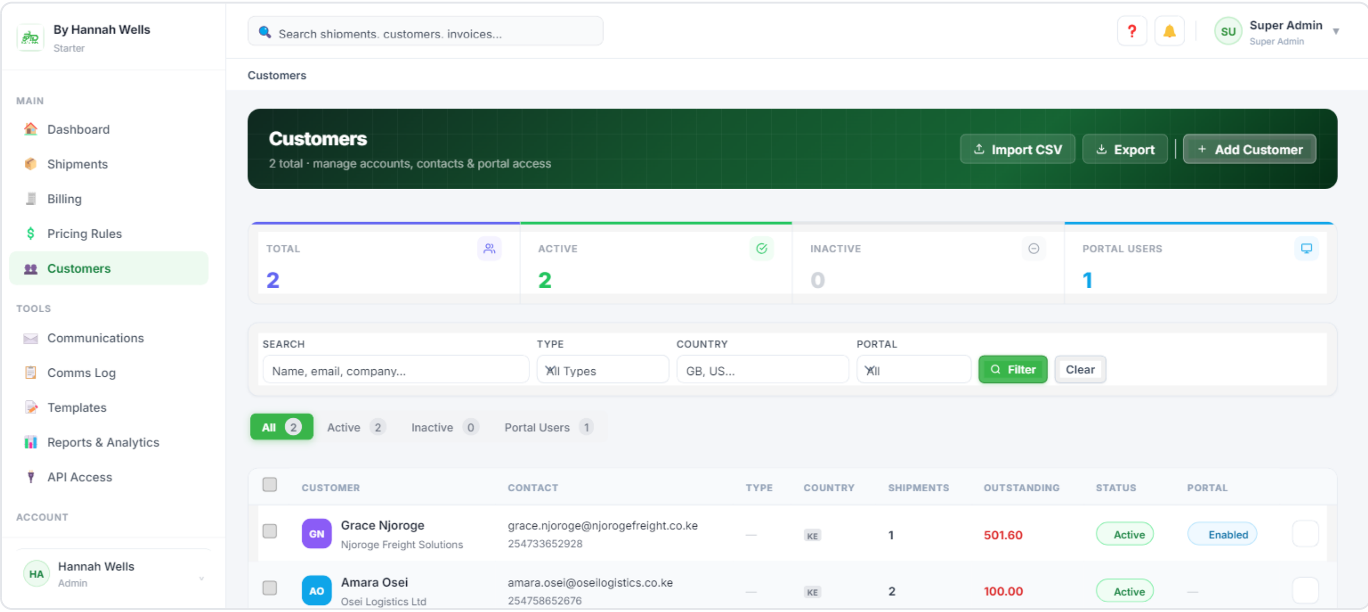

Figure 5.1 — Customer list with search, status filters, and bulk action controls.

The list shows each customer's name, email, phone, city, status (Active/Inactive), total shipments, and outstanding balance. Use the search bar to find customers by name, email, or phone. Filter by status, country, or tags.

Bulk Actions

- Bulk activate / deactivate customers
- Export selected customers to CSV
- Send bulk email or SMS to selected customers

5.2 Customer Profile

Click a customer to view their full profile. The profile is organised into tabs:

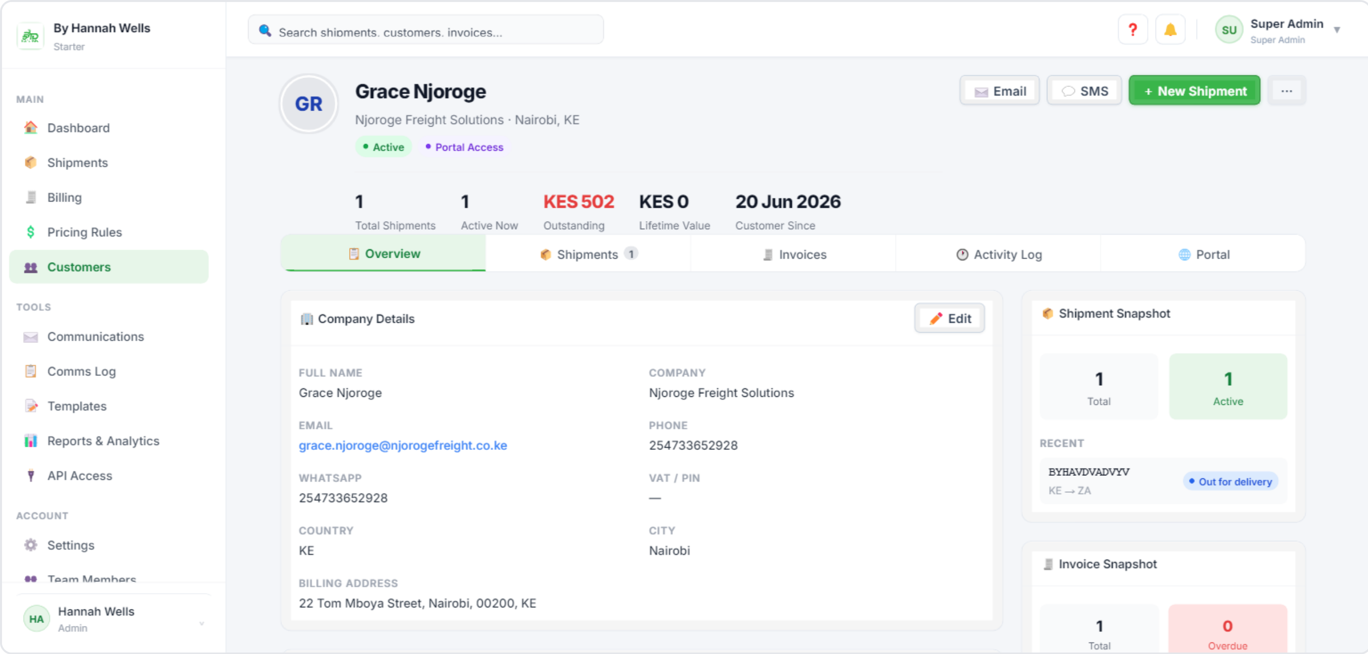

Figure 5.2 — Customer profile showing overview, shipment history, and invoice tabs.

Tab	Contents
Overview	Contact details, billing address, account manager, credit limit, payment terms, notes
Shipments	All shipments for this customer with status, tracking number, and quick-links
Invoices	All invoices, total billed, total paid, and outstanding balance
Activity	Full audit trail of all actions on this customer's record
Portal	Manage customer portal users — invite, view active access, revoke

5.3 CSV Import

To import customers in bulk, go to **Customers → Import**. The import wizard supports a 3-step process:

1

Upload: Upload a CSV file. Download the sample template to ensure correct column structure.

2

Map Columns: Map your CSV columns to MCA fields. Required fields: Name, Email. Optional: Phone, Address, Country, etc.

3

Review & Confirm: Review the preview of records to be imported. Duplicates (matched by email) are flagged. Choose to skip or update duplicates.

5.4 Portal Access Management

Customers can be granted access to the self-service portal. From the customer profile → **Portal** tab:

1

Click **Invite to Portal**.

2

Enter the portal user's email. This can be the same as the customer's primary email or a different contact.

3

The customer receives an invitation email with a link to set their password and access the portal.

4

Active portal users are listed in the Portal tab. Revoke access at any time with a single click.

CHAPTER 6

Pricing Rules

Define rate tables, surcharges, and zone-pair pricing to automate shipment costing.

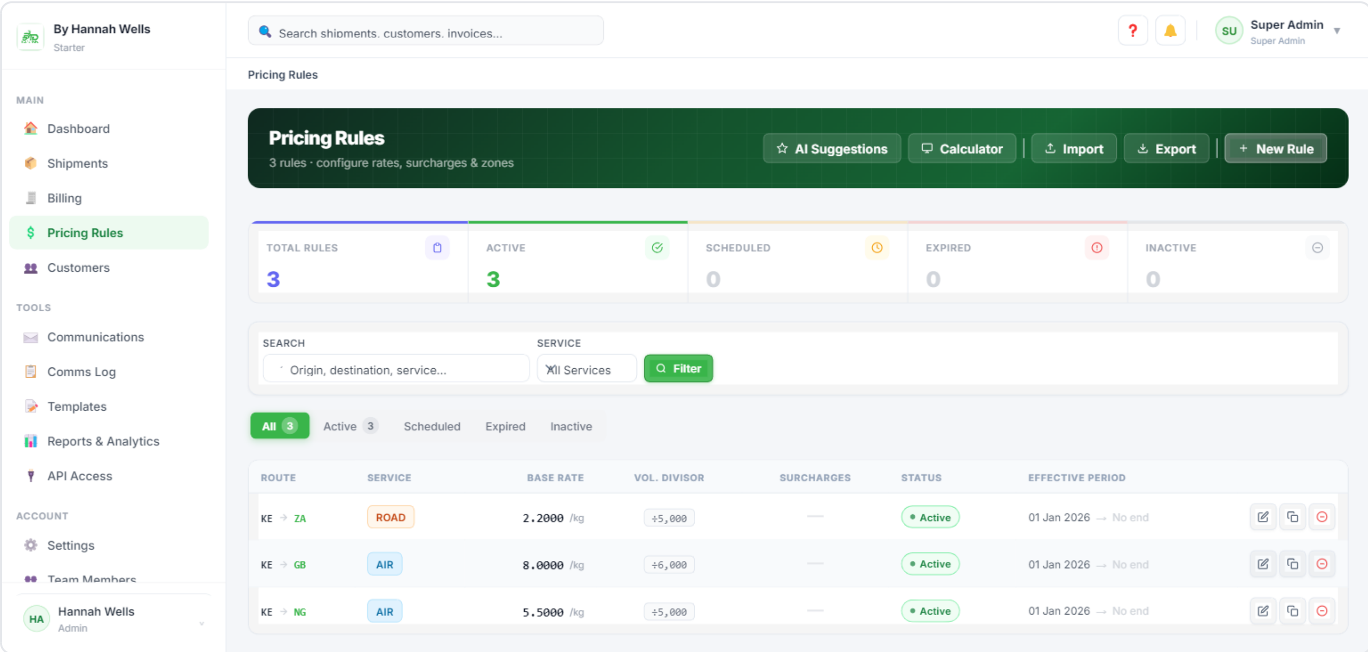

Figure 6.1 — Pricing rules list with status filter tabs and KPI summary.

6.1 Understanding Pricing Rules

A pricing rule defines how much to charge for a shipment based on its origin country, destination country, and service type. Rules can include a base rate plus weight-based or volume-based charges, and any number of surcharges (fuel, security, remote area, etc.).

6.2 Creating a Pricing Rule

1

Go to **Pricing Rules → Create New Rule**.

2

Select **Origin Country** and **Destination Country**. Optionally scope to a specific service type (Air, Sea FCL, Sea LCL, etc.).

3

Set the **Base Rate** and rate basis (per kg, per CBM, per shipment).

4

Add **Surcharges**: name, type (%, fixed), and amount.

5

Set **Effective Date Range** (start/end). Rules outside the date range are automatically ignored.

6

Save. The rule is active immediately and will be offered when creating shipments on matching routes.

6.3 Pricing Calculator

Use **Pricing Rules → Pricing Calculator** to test any rule before applying it. Enter origin, destination, service type, weight, and volume — the calculator shows which rules match and the computed total.

6.4 Pricing Audit Log

The **Pricing Audit** tab records every change to every pricing rule — who changed it, what changed, and when. This provides a full audit trail for compliance purposes.

6.5 Duplicating & Deactivating Rules

From any pricing rule detail page, you can **Duplicate** the rule (useful for creating seasonal variants) or **Deactivate** it (removes it from shipment creation without deleting the history).

> **RULE PRIORITY**
>
> If multiple active rules match a shipment's origin/destination/service, the most specific rule takes priority. A rule scoped to a specific service type takes precedence over a general "all services" rule for the same zone pair.

CHAPTER 7

Communications

Send professional emails and SMS messages to customers, manage templates, and track all communication history.

7.1 Composing an Email

Navigate to **Communications → Compose Email** to send a manual email to one or more customers.

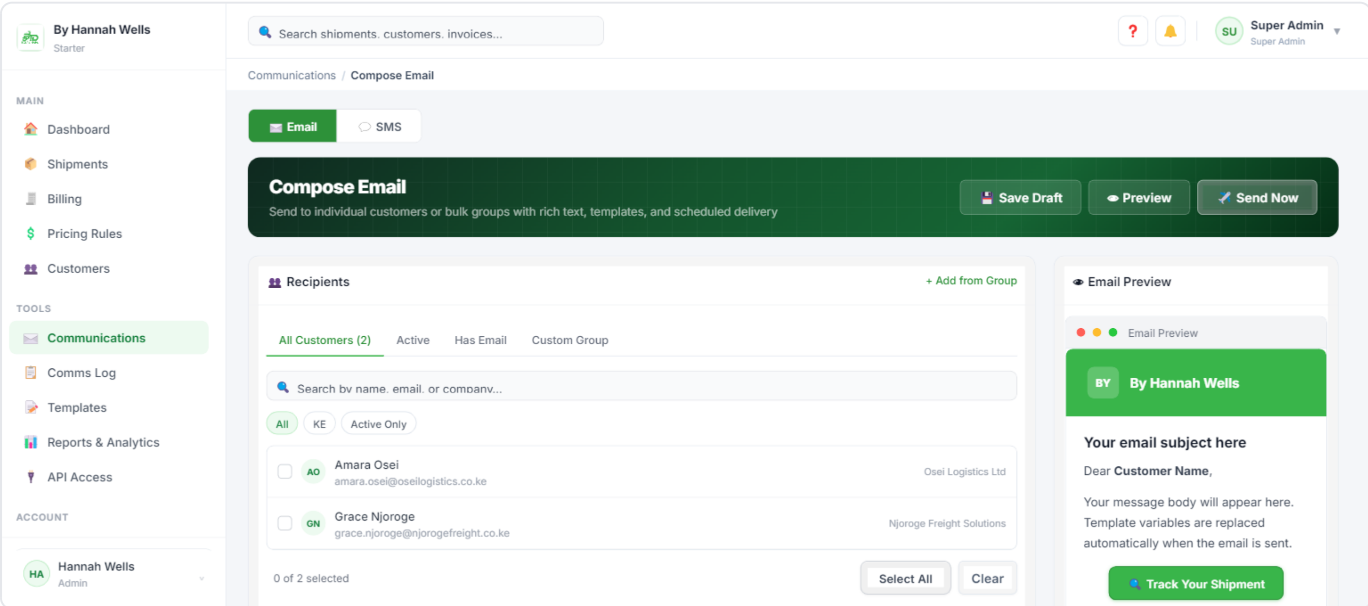

Figure 7.1 — The email composition interface with recipient selector, template picker, and rich-text editor.

Email Composition Features

Recipient Selector

Select recipients from your customer list using a multi-column checkbox interface. Filter by customer group or search by name/email.

Template Picker

Choose from your saved email templates. The body is pre-populated and can be customised before sending.

Rich Text Editor

Full WYSIWYG editor — bold, italic, bullet lists, headings, links, and image embedding.

Variable Insertion

Insert dynamic variables such as `{{customer_name}}`, `{{tracking_number}}`, and `{{invoice_number}}` that personalise each email.

Schedule Send

Optionally schedule the email to send at a future date and time.

Preview

Preview the email as it will appear to the recipient before sending.

7.2 Sending SMS

Navigate to **Communications → Compose SMS** to send text messages to customers. SMS messages are delivered via the Clickatell gateway using your allocated SMS credits.

> **SMS CREDITS**
>
> Each SMS consumes credits from your account's SMS credit pool. Standard messages (up to 160 characters) cost 1 credit. Longer messages are split and cost proportionally more. Your remaining credits are always shown in the SMS composer.

7.3 Email & SMS Log

Navigate to **Comms Log** to view a complete history of all emails and SMS messages sent from your account.

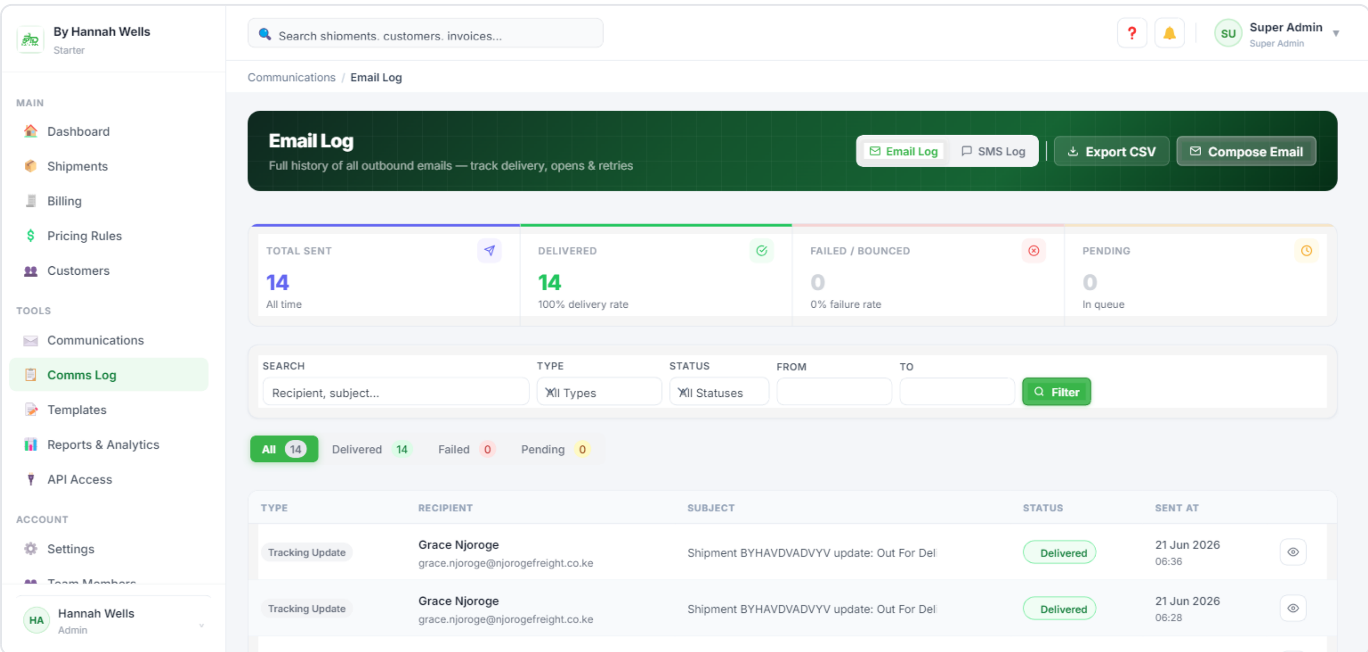

Figure 7.2 — The email log showing sent messages with status, recipient, and timestamp.

The log shows: message type, recipient, subject (email) or preview (SMS), send status (Sent, Failed, Pending), and timestamp. Failed messages can be retried with one click. Click any email row to view the full message content.

7.4 Email Templates

Navigate to **Templates** to view and edit your email template library. MCA comes with pre-built templates for common shipment events.

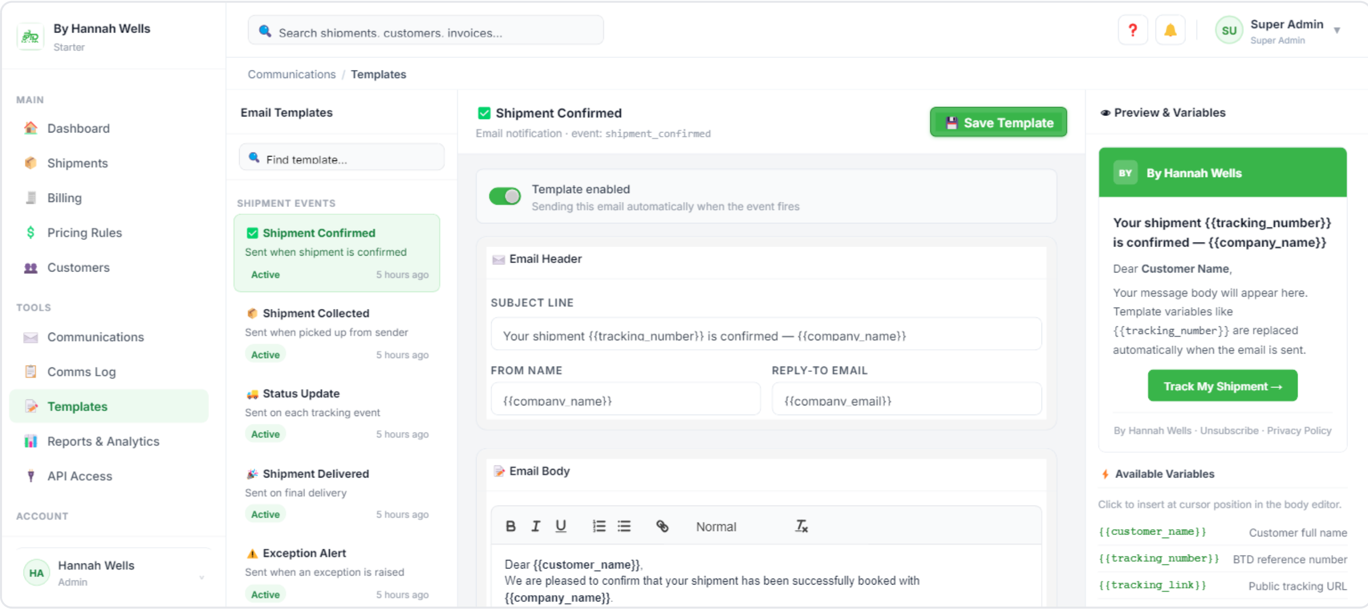

Figure 7.3 — The email templates library showing available event-based templates.

Built-in Template Events

Template	Triggered When
Shipment Booked	New shipment is confirmed
Shipment In Transit	Status updated to In Transit
Out for Delivery	Status updated to Out for Delivery
Shipment Delivered	Status updated to Delivered
Exception Alert	Status updated to Exception
Invoice Issued	Invoice sent to customer
Payment Received	Payment recorded against invoice
Portal Invite	Customer invited to the self-service portal
Password Reset	User requests password reset

AUTOMATED NOTIFICATIONS

Templates marked as "automated" are triggered automatically when the corresponding event occurs — no manual action needed. Edit the template body to customise the message your customers receive.

CHAPTER 8

Reports & Analytics

Gain deep insight into your freight operations with data-driven reports and exportable analytics.

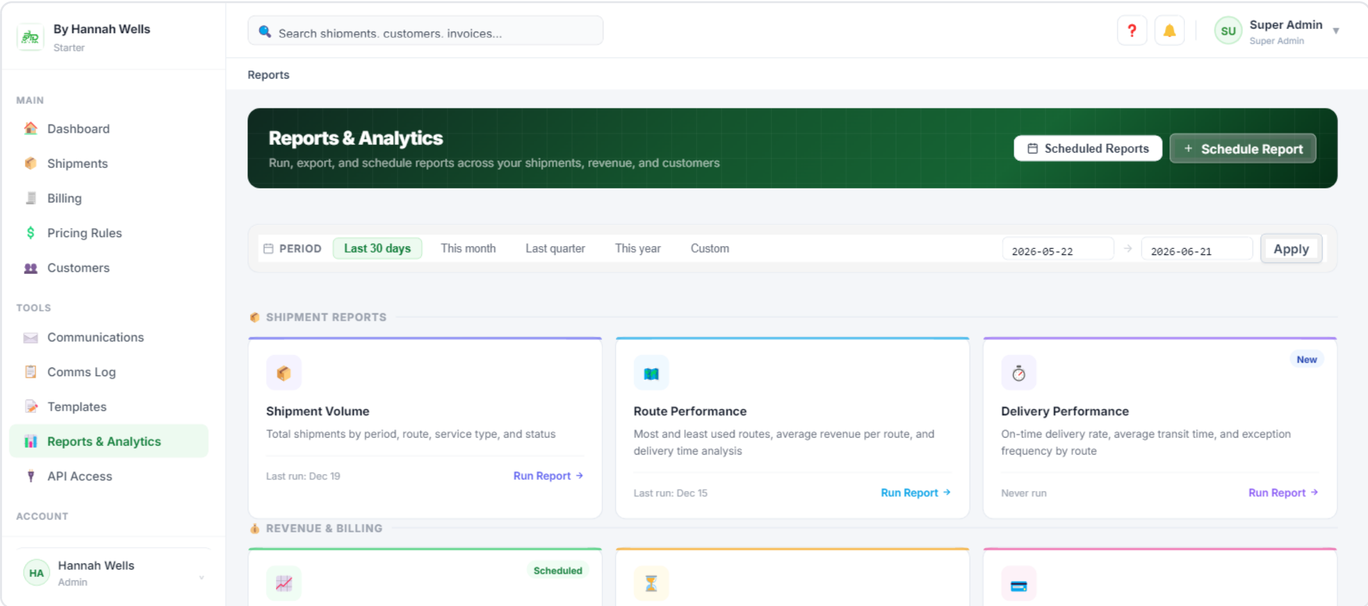

Figure 8.1 — The Reports & Analytics index with available report types and date-range picker.

8.1 Shipment Volume Report

Analyse shipment volume over any time period. The report shows total shipments, breakdowns by status and service type, and trend charts. Perfect for identifying peak periods and capacity planning.

8.2 Revenue Report

Track revenue performance over time. View total invoiced, total collected, and outstanding balances, with a trend line chart and per-customer breakdown. Filter by date range and service type.

8.3 Ageing Receivables Report

The ageing report shows all outstanding invoices grouped into age buckets to help prioritise collections:

Bucket	Description
Current	Not yet due

1–30 Days	Overdue by up to 30 days
31–60 Days	Overdue by 31–60 days
61–90 Days	Overdue by 61–90 days
90+ Days	Severely overdue — escalate immediately

8.4 Scheduled Reports

Configure any report to be delivered automatically by email on a recurring schedule (daily, weekly, or monthly). Navigate to the report → click **Schedule** → set frequency, recipient emails, and file format (PDF or CSV).

8.5 Exporting Data

All reports support CSV export. Click the **Export CSV** button on any report to download the current filtered data set. Large exports are streamed to avoid timeouts.

> **PRO TIP: SCHEDULED REPORTS FOR FINANCE TEAMS**
>
> Set up a weekly ageing receivables report scheduled every Monday morning to land in your finance team's inbox automatically — keeping them updated on outstanding collections without any manual effort.

Settings

Configure your company profile, branding, team access, invoice format, and system preferences.

9.1 Company Branding

Access via **Settings → Branding**. Your branding settings control how your company appears across all customer-facing elements — portal, invoice PDFs, and email headers.

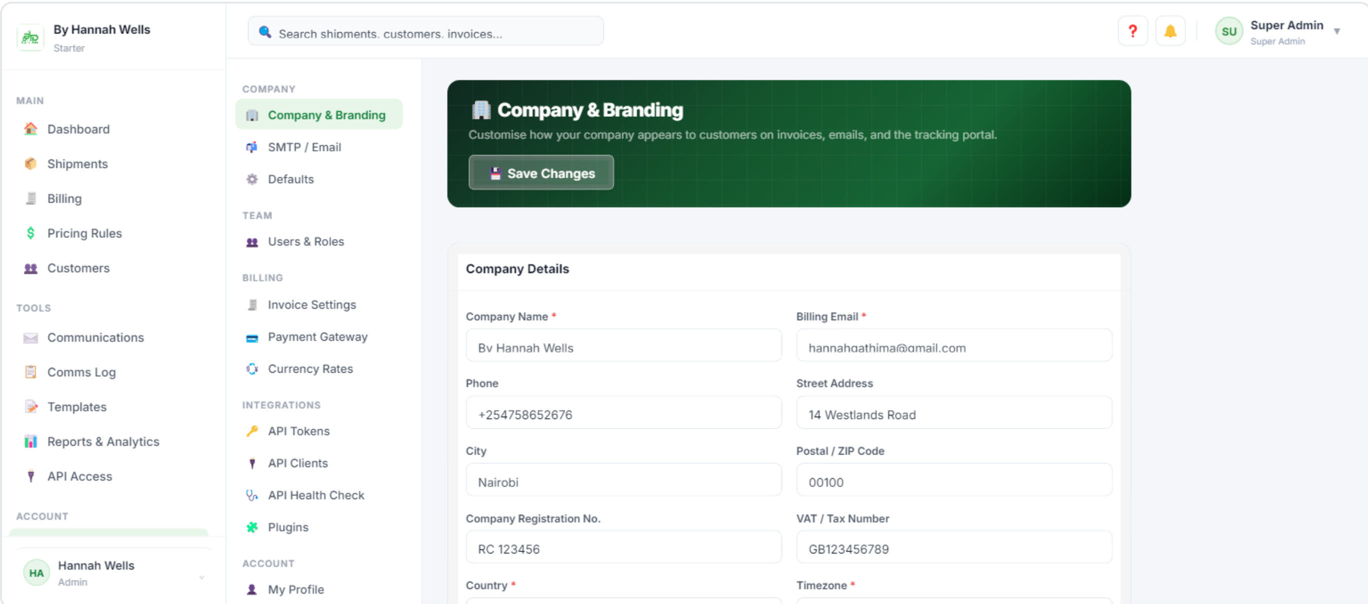

Figure 9.1 — Branding settings with logo upload, colour picker, and invoice footer editor.

Company Logo

Upload your company logo (PNG/JPG, recommended 300×100px). Used on invoice PDFs, customer portal, and email headers.

Brand Colour

Set your primary brand colour (hex code). Applied to buttons, accents, and highlights in the customer portal.

Invoice Footer

Rich-text editor for your invoice footer — include payment bank details, terms, company registration number, VAT number, etc.

Favicon

Upload a custom favicon (ICO format) displayed in browser tabs when customers access the portal.

9.2 Team Members

Manage user accounts for your team via **Settings → Team Members**.

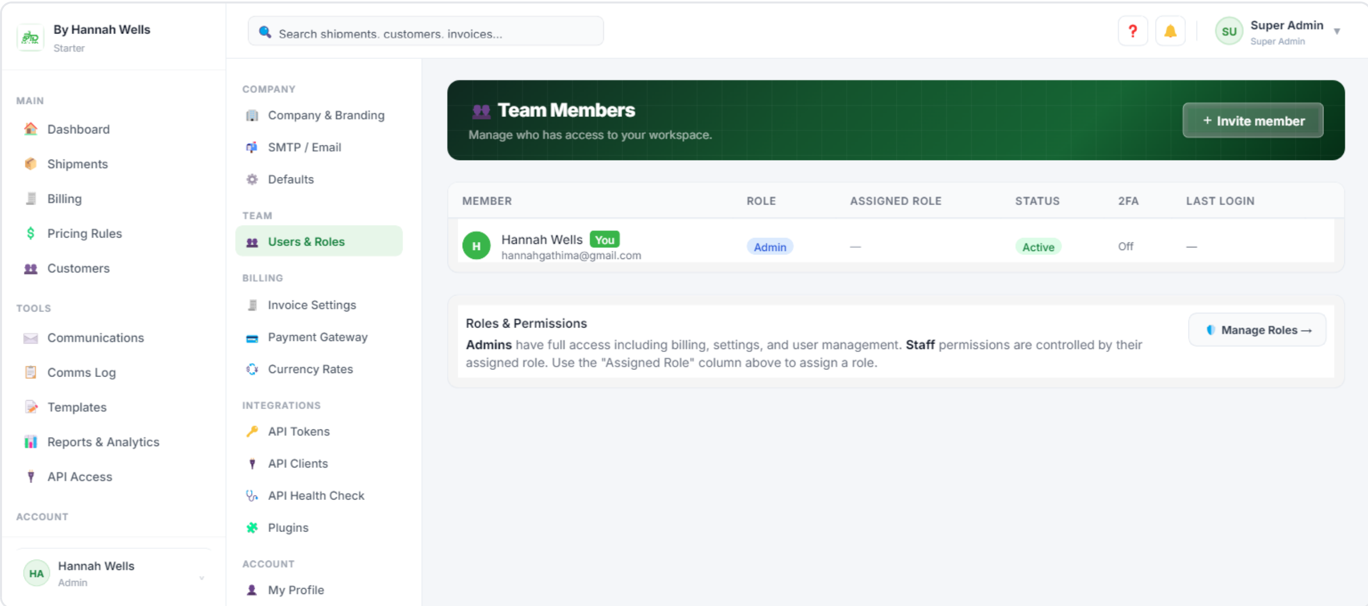

Figure 9.2 — Team member management with role assignment and invite controls.

User Roles

Role	Access Level
Admin	Full access to all modules including Settings. Can invite and manage other users.
Manager	Access to all operational modules (Shipments, Billing, Customers, Communications, Reports). No Settings access.
Staff	Operational access — Shipments and Customers. Limited Billing access. No Reports or Settings.

Inviting a Team Member

1

Click **Invite User**.

2

Enter their name, email, and assign a role.

3

They receive an email invitation with a link to set their password and join your team.

9.3 SMTP Configuration

By default, MCA sends emails using the platform's shared mail server. For higher deliverability and branding control, connect your own SMTP server via **Settings → SMTP**.

Enter your SMTP host, port, username, password, and encryption type (TLS/SSL). Use the **Send Test Email** button to verify the connection before saving.

9.4 Invoice Format

Configure how invoice numbers are generated via **Settings → Invoice Format**.

- **Prefix**: e.g. `INV`
- **Separator**: e.g. `-`
- **Year component**: Include or exclude the year (e.g. `2026`)
- **Number padding**: Minimum digits, e.g. `001`, `0001`
- **Result preview**: `INV-2026-0001`

9.5 Default Settings

Configure system-wide defaults: default currency, default payment terms (e.g. Net 30), default country, and default weight/dimension units (kg/cm or lbs/in).

CHAPTER 10

API Access

Integrate MCA with your existing systems using the full-featured REST API.

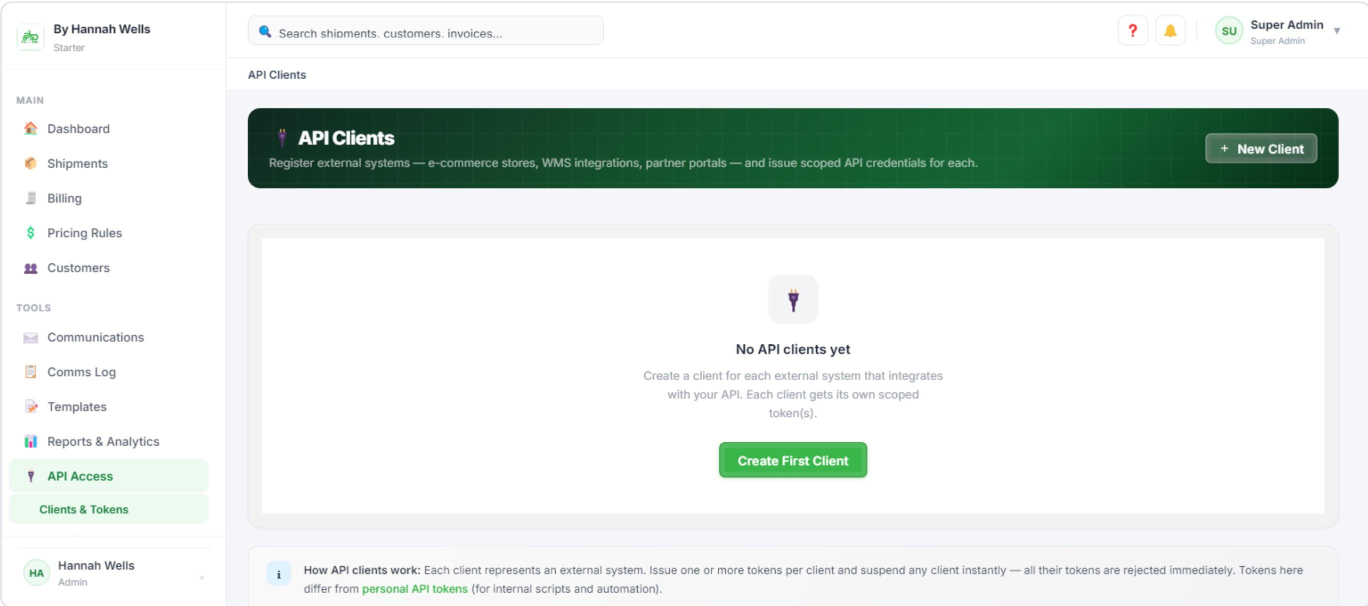

Figure 10.1 — The API Clients management page for creating and managing API credentials.

10.1 Overview

MCA provides a full REST API at `/api/v1/` — allowing integration with ERPs, warehouse management systems, e-commerce platforms, and custom applications. The API uses Bearer token authentication via Laravel Sanctum.

10.2 Creating an API Client

1

Navigate to **API Access** in the sidebar.

2

Click **New API Client**. Enter a descriptive name (e.g. "WMS Integration") and contact email.

3

Click **Generate Token**. The token is shown *once only* — copy and store it securely immediately.

4

The API client is now active. Each client can have multiple tokens with different ability scopes.

TOKEN SECURITY

API tokens are shown only once at creation. If you lose a token, you must revoke it and generate a new one. Never share tokens or commit them to version control.

10.3 Making API Requests

```
curl https://mycargoagent.com/btd-app/api/v1/shipments \
  -H "Authorization: Bearer {your-token}" \
  -H "Accept: application/json"
```

10.4 Key Endpoints

Method	Endpoint	Description
GET	/api/v1/auth/me	Get authenticated client info
POST	/api/v1/auth/token	Issue a new API token
GET	/api/v1/customers	List customers (paginated)
POST	/api/v1/customers	Create a new customer
GET	/api/v1/shipments	List shipments (paginated, filterable)
POST	/api/v1/shipments	Create a new shipment
GET	/api/v1/shipments/{id}	Get shipment detail
PATCH	/api/v1/shipments/{id}	Update shipment status or details
GET	/api/v1/invoices	List invoices
GET	/api/v1/pricing	List active pricing rules
POST	/api/v1/pricing/calculate	Calculate rate for a given route & weight
GET	/api/v1/track/{reference}	Public tracking — no auth required
GET	/api/v1/geo/countries	List all countries

10.5 Response Format

```
{
  "success": true,
  "message": "Shipment retrieved successfully",
```

```
  "data": { ... },
  "meta": {
    "current_page": 1,
    "per_page": 25,
    "total": 142
  }
}
```

10.6 Rate Limiting

The API enforces rate limits to ensure platform stability. Standard limits: 60 requests per minute per token. Rate limit headers are included in every response:

```
X-RateLimit-Limit: 60
X-RateLimit-Remaining: 47
X-RateLimit-Reset: 1718963240
```

CHAPTER 11

Customer Self-Service Portal

Empower your customers with a branded, self-service portal to track shipments and manage invoices without contacting your team.

11.1 Portal Overview

The MCA Customer Portal is a dedicated, fully branded web interface for your customers. Each customer who has been granted portal access can log in to view their own shipments, invoices, and documents — in real time, 24/7, without needing to call or email your team.

Your Branding

The portal displays your company logo and brand colour — not MCA's branding. Your customers see it as your own platform.

Data Isolation

Each customer sees only their own shipments and invoices. They cannot see other customers' data.

Real-Time Data

All data in the portal is live — status updates, new invoices, and payments appear immediately.

Mobile-Friendly

The portal is fully responsive and works on smartphones, tablets, and desktops.

11.2 Logging In to the Portal

Customers access the portal at your MCA URL + `/portal` (e.g. `https://mycargoagent.com/btd-app/portal`). They log in with the email and password set when they accepted their invitation.

11.3 Portal Features

Shipments

Customers can view all their shipments, filter by status, and click into any shipment to see the full tracking timeline — the same timeline your operations team updates in real time.

Invoices

Customers can view all their invoices, see outstanding balances, and download professional PDF invoices — reducing the volume of invoice-related queries your team handles.

Shipment Tracking

The tracking timeline in the portal mirrors the same events your team adds to shipments. Customers see every status update with timestamp and location.

Documents

Customers can download any documents you've attached to their shipments (Bill of Lading, Airway Bills, Packing Lists, etc.).

11.4 Granting and Revoking Access

Portal access is managed from the Customer profile → Portal tab in your MCA admin panel. See Section 5.4 for full instructions on inviting and revoking portal users.

> **MULTIPLE PORTAL USERS PER CUSTOMER**
>
> A single customer can have multiple portal users — for example, a logistics coordinator and an accounts payable contact. Each portal user has their own login credentials.

CHAPTER 12

Public Shipment Tracker

A no-login tracking page anyone can use — perfect for sharing with consignees and third parties.

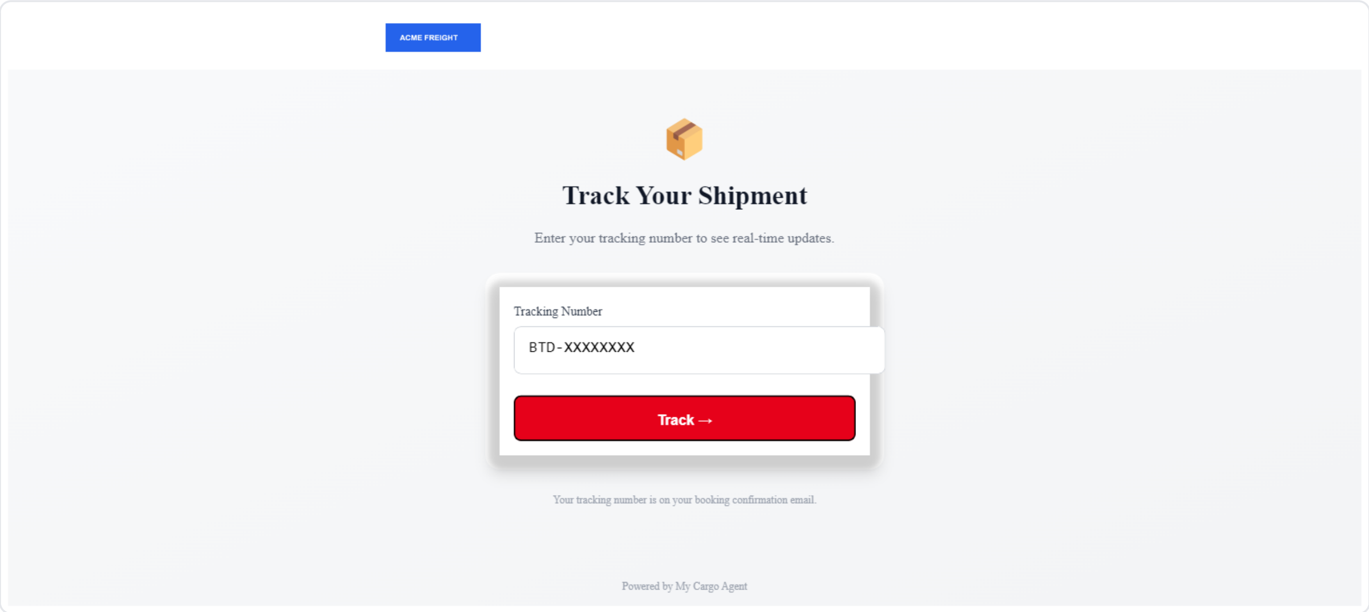

Figure 12.1 — The public shipment tracking page — no login required.

12.1 Overview

The Public Tracker at `/track` allows anyone with a tracking number or shipment reference to look up a shipment's current status and timeline — without needing an account or login.

This is ideal for sharing with:

- Consignees receiving a delivery who don't have portal access
- Third-party logistics partners needing status visibility
- Customs agents needing shipment details
- Anyone you share a tracking link with

12.2 Using the Tracker

1

Navigate to `/track` (no login required).

2

Enter the tracking number (e.g. `BYHANTH4MOBE`) or the customer reference number.

3

Click **Track**. The current status, route, and full event timeline are displayed.

12.3 What Is Shown

The tracking result page displays:

- Current shipment status (colour-coded badge)
- Origin and destination (country names)
- Expected delivery date
- Full event timeline with timestamps and locations
- Cargo description (type and piece count — no pricing)

PRIVACY & DATA

The public tracker never shows pricing, invoice amounts, customer account details, or any commercially sensitive information. Only logistical status data is displayed.

12.4 Direct Tracking Links

You can create a direct link to a specific shipment's tracking page:

```
https://mycargoagent.com/btd-app/track/{tracking-number}
```

Share this link in your shipment booking confirmation emails (the Shipment Booked template can include this automatically using the `{{tracking_url}}` variable).

CHAPTER 13

Freight Documentation

Generate, issue, and manage industry-standard freight documents — HAWB, MAWB, HBL, MBL, Bill of Lading, and Cargo Manifests.

13.1 Document Types Overview

The Freight Documents module produces the standard transport documents required for air and ocean freight movements. Each document type follows IATA or FIATA/BIMCO formatting conventions and is generated as a branded, print-ready PDF with an embedded QR code for verification.

Document	Full Name	Mode	Issued By
HAWB	House Air Waybill	Air	Freight forwarder / agent, to the shipper
MAWB	Master Air Waybill	Air	Airline / consolidator, covering one or more HAWBs
HBL	House Bill of Lading	Ocean	Freight forwarder / NVOCC, to the shipper
MBL	Master Bill of Lading	Ocean	Ocean carrier, covering one or more HBLs
BOL	Bill of Lading	Ocean / Road	Carrier, as a standalone transport & title document
Manifest	Cargo Manifest	Air / Ocean	Consolidator, listing all cargo in a shipment or consolidation

WHERE TO FIND IT

Freight Documents live under **Operations → Freight Docs** in the sidebar. The module is available to Freight Agent Admins and Staff members with the appropriate permission (see 13.6).

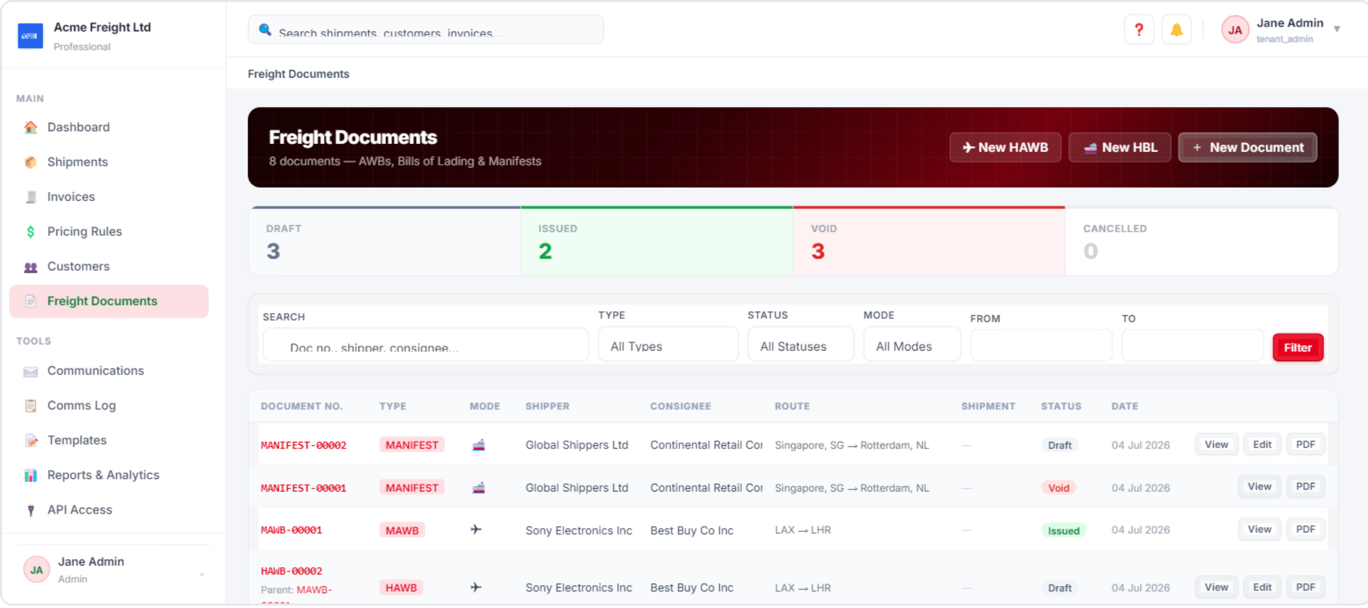

Figure 13.1 — The Freight Documents list, filterable by type, status, and shipment.

13.2 Creating a Freight Document

1

From a shipment's detail page, or from **Freight Docs → New Document**, select the document type (HAWB, MAWB, HBL, MBL, BOL, or Manifest).

2

Complete the shipper, consignee, and notify party details, along with routing, cargo description, and weight/volume fields specific to the selected document type.

3

Save as a **draft** to continue editing later, or **issue** the document once all details are confirmed.

4

Download or print the generated PDF, which includes a scannable QR code linking to the document's verification page.

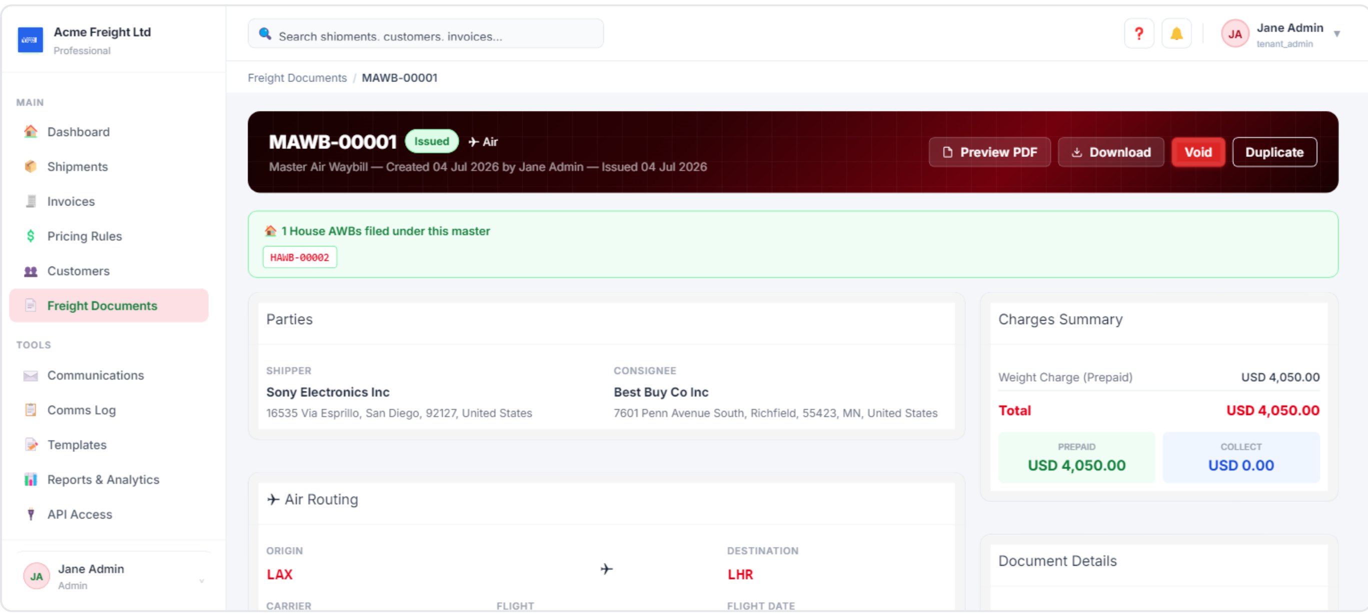

Figure 13.2 — A generated freight document showing the standard field-block layout and QR verification code.

13.3 Numbering & Status Lifecycle

Each document is assigned a unique reference in the format `{PREFIX}-{YEAR}-{SEQUENCE}`, for example `HAWB-2026-000042`. The prefix and numbering behaviour are configurable per freight agent (see 13.5).

Status	Meaning
Draft	Editable. Not yet issued — no legal or operational standing.
Issued	Finalised and read-only. Represents the official transport document.
Void	Cancelled after issuance. Retained for audit purposes but no longer valid for use.

ISSUED DOCUMENTS ARE LOCKED

Once a document is issued, its fields can no longer be edited. To correct an error, void the document and issue a new one — this preserves an accurate audit trail.

13.4 Consolidation (MAWB / MBL)

Master documents can consolidate multiple house documents into a single carrier-level shipment:

- A **MAWB** can be linked to one or more **HAWBs**, representing several house shipments travelling under one airline booking.
- An **MBL** can be linked to one or more **HBLs**, representing several house shipments consolidated into one ocean container or booking.
- A **Cargo Manifest** can be generated for a consolidation, listing every piece of cargo across all linked house documents with running totals.

13.5 Freight Document Settings

Freight Agent Admins can configure document behaviour under **Settings → Freight Documents**:

Document Prefixes

Set a custom prefix per document type (e.g. `HAWB`, `MBL`).

Yearly Reset

Optionally reset the sequence number to zero at the start of each calendar year.

IATA / Agent Code

Store the freight agent's IATA code for inclusion on air waybills.

Default Handling Instructions

Pre-fill standard handling instructions text on new documents.

13.6 Permissions

Access to the Freight Documents module is controlled by two permissions, assignable per staff role:

Permission	Grants
`freight_docs.view`	View and download existing freight documents
`freight_docs.manage`	Create, edit, issue, and void freight documents

All freight documents are scoped to the freight agent that created them — no cross-company visibility is possible, consistent with the platform's multi-company isolation model.

APPENDIX

Quick Reference & Support

Key URLs, keyboard shortcuts, and support contacts.

Key URLs

Page	URL
Freight Agent Login	/login
Dashboard	/dashboard
New Shipment	/shipments/create
Invoices	/invoices
Customers	/customers
Pricing Rules	/pricing
Compose Email	/comms/compose
Email Log	/comms/email-log
Templates	/comms/templates
Reports	/reports
Settings → Branding	/settings/branding
Settings → Users	/settings/users
API Clients	/api-clients
Customer Portal	/portal
Public Tracker	/track
API Base URL	/api/v1/

Keyboard Shortcuts

Shortcut	Action
`Ctrl + K`	Open global search / command palette
`Esc`	Close modal / cancel action

Shipment Status Reference

Status	Colour	Meaning
Booked	Blue	Created, awaiting pickup
In Transit	Amber	En route to destination
Out for Delivery	Orange	Final-mile delivery in progress
Delivered	Green	Successfully delivered
Exception	Red	Issue requiring attention
Cancelled	Grey	Shipment cancelled

Invoice Status Reference

Status	Description
Draft	Not yet sent to customer
Sent	Emailed to customer, awaiting payment
Partial	Partially paid — balance outstanding
Paid	Fully paid — no balance
Overdue	Past due date, balance outstanding
Void	Cancelled invoice

API Token Abilities Reference

Ability	Access
`*`	Full access — all endpoints
`shipments:read`	Read shipments only

`shipments:write`	Create and update shipments
`customers:read`	Read customers only
`invoices:read`	Read invoices only
`tracking:read`	Public tracking only

My Cargo Agent — Enterprise Freight Management Platform

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