

## CFS Portal User Guide

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## Introduction

Welcome to our user guide! We'll walk you through the basics of how to navigate and use our new online portal to manage CFS shipments.

### Browser Compatibility

Our web portal supports the latest desktop versions of [Google Chrome](#), [Microsoft Edge](#), and [Mozilla Firefox](#), and is best viewed on a display of 1440px or larger.

### Obtaining Help

Please visit the [CODA Help Desk](#) or email [support@coda-usa.com](mailto:support@coda-usa.com) should you require assistance with this site.

### CFS Portal Access

Our web portal is accessible to current clients at <https://cfs.coda-usa.com>.

## Getting Started

### Terms and Conditions

By accessing our web portal, you consent to our Terms and Conditions policy. Please take a moment to review those terms at <https://coda-usa.com/terms-and-conditions>.

### Requesting Access

If you have not previously registered for CFS Portal access, please email your request to the CODA Help Desk at [support@coda-usa.com](mailto:support@coda-usa.com). Please include the following in the email:

- Your full name.
- Your unique email address.
- Your contact phone number.
- Your manager's name, email, and phone number (for verification).

You will be notified by email when your account is ready to be activated.

## Account Activation

To log in for the first time, you will need to perform a password reset.

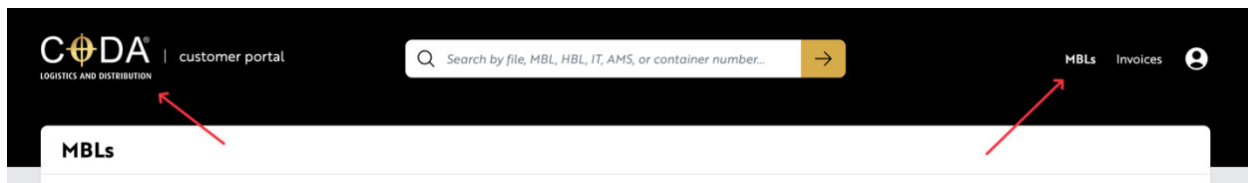
1. Open your web browser to <https://cfs.coda-usa.com>.
2. Click on "Forgot password?".
3. Enter your email address and press "Continue".

A password reset email should arrive within a few minutes if the provided email address matches one we have on file. Please check your junk/spam folder if the email has not been received within an hour. Follow the instructions contained in the email to complete your password reset.

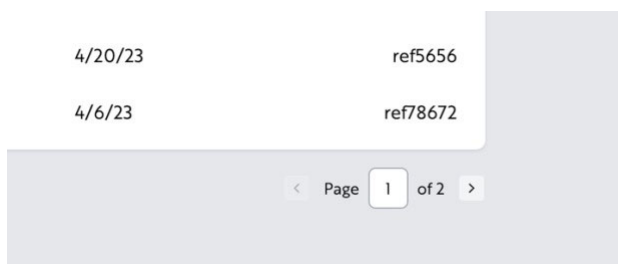
## Managing Shipments

### Master Bills of Lading (MBLs)

Access your list of MBLs by clicking on "MBLs" in the top-right corner of the main navigation bar or the CODA logo in the top-left corner.



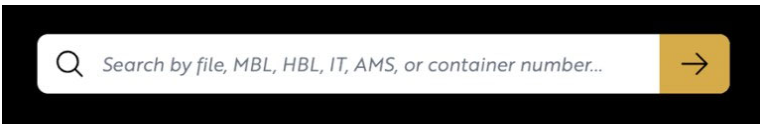
MBLs are sorted newest to oldest. If you have multiple pages of MBLs, you can navigate between them by using the controls at the bottom-right corner of your screen.



















Open any MBL by clicking on its corresponding file number.

# Finding a Shipment

Find any MBL or HBL within your account by using the search bar at the top of your screen.



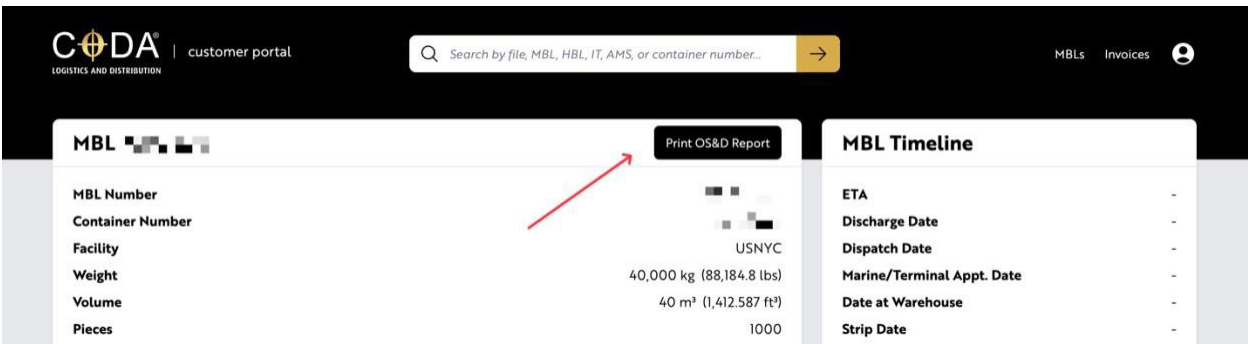
You can find bills of lading by typing three or more characters of their file number, MBL number, HBL number, IT number, AMS number, or container number. Navigate to any bill of lading by clicking on its file number.

MBL		MBL Number		Container Number	Facility USNYC				
MBL		MBL Number		Container Number	Facility USNYC				
MBL		MBL Number		Container Number	Facility USNYC				
MBL		MBL Number		Container Number	Facility USNYC				
HBL		MBL Number		Container Number	Facility USNYC	HBL Number 	Manifested 34 pieces, 4,431.29 lbs	Received 34 pieces, 4,431.29 lbs	

If an exact match is found, you'll be taken directly to the corresponding MBL/HBL.

## Print Over, Short, and Damaged Report (OS&D)

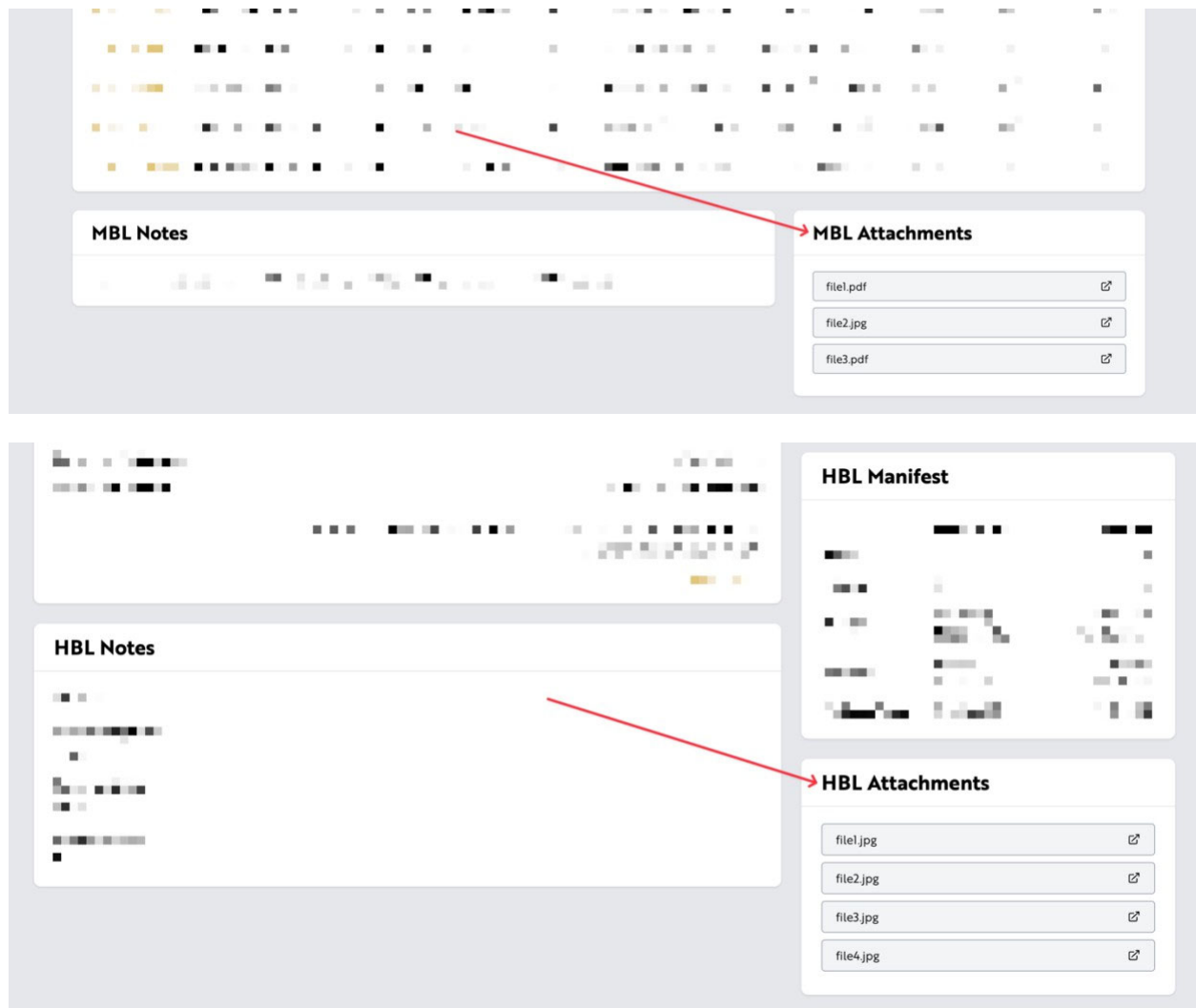
When viewing an MBL, you may generate a PDF OS&D report by clicking on the appropriate button. This document will list the condition of each house bill of lading after devan.



## Pictures and Attachments


When available, attachments are accessible on MBLs and HBLs by scrolling to the bottom-right corner of the page.

Clicking on a file name will either open the file for viewing in a new tab of your browser or automatically download to your computer, depending on the attachment type.





## Warehouse Collect Charges (IWCA)

You may specify warehouse collect charges on non-IPI shipments, prior to release. Navigate to an HBL and click on the corresponding dollar amount in the IWCA column to edit.



customer portal

[MBLs](#)
[Invoices](#)


MBL 

Print OS&D Report

MBL Number

Container Number

Facility

Weight

Volume

Pieces

Vessel

Customer Reference

USNYC

40,000 kg (88,184.8 lbs)

40 m³ (1,412.587 ft³)

1000

-

-

MBL Timeline

ETA

Discharge Date

Dispatch Date

Marine/Terminal Appt. Date

Date at Warehouse

Strip Date

Available Date

Last Free Date

-

-

-

-

-

-

-

HBLs

File Number	AMS Number	HBL Number	Package Type	Pieces	Weight	Volume	Destination	Ship Date	IWCA
			CARTON	50	500 kg (1,102.31 lbs)	5 m³ (176.573 ft³)	USNYC	-	<span>\$20.00</span>

Warehouse Collect Charges

Specify charges for HBL . These charges may be modified prior to the release of shipment.

\$


20

Cancel

Save

## House Bills of Lading (HBLs)

HBLs are accessible by navigating to an MBL and clicking on the corresponding file number beneath the “HBLs” heading.



customer portal

MBLs

Invoices

MBL

Print OS&D Report

MBL Number

Container Number

Facility

Weight

Volume

Pieces

Vessel

Customer Reference

USNYC

40,000 kg (88,184.8 lbs)

40 m³ (1,412.587 ft³)

1000

-

-

MBL Timeline

ETA

Discharge Date

Dispatch Date

Marine/Terminal Appt. Date

Date at Warehouse

Strip Date

Available Date

Last Free Date

-

-

-

-

-

-

-

HBLs

File Number	AMS Number	HBL Number	Package Type	Pieces	Weight	Volume	Destination	Ship Date	IWCA
<a href="#">123456789-01</a>			CARTON	50	500 kg (1,102.31 lbs)	5 m³ (176.573 ft³)	USNYC	-	\$20.00

Print Arrival Notice

You may generate a PDF arrival notice prior to an HBL being shipped. Navigate to an HBL, then click "Print Arrival Notice".

Print Pickup Receipt

You may generate a PDF arrival notice after an HBL has been shipped. Navigate to an HBL, then click "Print Pickup Receipt".

Releasing a Shipment

An HBL can be freight released by navigating to it and clicking the "Release" button. You can unrelease a shipment until it has been physically released.

customer portal

Q

Search by file, MBL, HBL, IT, AMS, or container number...

→

MBLs

Invoices

MBL

Go to MBL

MBL Number

Container Number

Facility

Weight

Volume

Pieces

Vessel

Customer Reference

USNYC

40,000 kg (88,184.8 lbs)

40 m³ (1,412.587 ft³)

1000

-

-

MBL Timeline

ETA

Discharge Date

Dispatch Date

Marine/Terminal Appt. Date

Date at Warehouse

Strip Date

Available Date

Last Free Date

HBL

Print Arrival Notice

Release

HBL Number

AMS Number

GO Date

Customs Release

HBL Timeline

## Marks Hold

If a shipment cannot be properly identified, it'll be placed into marks hold.

customer portal

Q

Search by file, MBL, HBL, IT, AMS, or container number...

→

MBLs

Invoices

MBL

Go to MBL

MBL Number

Container Number

Facility

Weight

Volume

Pieces

Vessel

Customer Reference

USNYC

40,000 kg (88,184.8 lbs)

40 m³ (1,412.587 ft³)

1000

-

-

MBL Timeline

ETA

Discharge Date

Dispatch Date

Marine/Terminal Appt. Date

Date at Warehouse

Strip Date

Available Date

Last Free Date

HBL

Print Arrival Notice

Remove Marks Hold

Release

HBL Number

AMS Number

Headload

Delivery Order

Cargo Hold

Marks Hold

Cargo Description

Customer Reference

No

No

No

Yes

FAK

-

HBL Timeline

GO Date

Customs Release

Freight Release

Ship Date

Exchange Pallets

HBL Manifest

To lift this hold, press the "Remove Marks Hold" button and confirm. Refer to your "Over, Short, & Damaged Report" for details on discrepancies.



### Remove Marks Hold

Are you sure you want to remove the marks hold on HBL

**1** **2** **3** **4** **5** **6** **7** **8** **9** **0** **\*** **#** **?**

Cancel

Remove Marks Hold

Shipment Charges

Charges are available on non-IPI shipments and are listed at the bottom of an HBL page.

E-Guarantee

Check off the charges you would like to guarantee. A total is displayed at the bottom. Then, press "E-Guarantee Selected Charges".

HBL Charges			Calculate Demurrage	E-Guarantee Selected Charges
				2
1	<input checked="" type="checkbox"/> Description	Rate	Amount	
	<input checked="" type="checkbox"/> Import Facility Fee	Flat rate 125.00 quantity 1	\$125.00	
	<input checked="" type="checkbox"/> Import Pallet Purchase	\$20.00/PALLET quantity 4	\$80.00	
	<input type="checkbox"/> Import Labor/Transportation Charge	\$8.50/CBM \$8.50/800 LBS quantity 20.00	\$170.00	
	<input type="checkbox"/> Import Demurrage Fee	\$20/CWT \$2.50/CBM quantity 12.24 minimum \$50	\$244.71	
	<input type="checkbox"/> Import Demurrage Fee	\$20/CWT \$2.50/CBM quantity 12.24 minimum \$50	\$244.71	
	<input type="checkbox"/> Import Demurrage Fee	\$40/CWT \$5.00/CBM quantity 12.24 minimum \$95	\$489.42	
	Selected Total		→	\$205.00

A dialog will appear with a required "Billing Reference Number" for your records.

### E-Guarantee Charges

Billing Reference Number

Total

\$205.00

Press "Submit". You will see a confirmation screen and receive an email confirmation. These charges will also no longer appear under "HBL Charges".

## Calculating Demurrage Fees

Demurrage fees may be calculated by scrolling to the bottom of the HBL page and clicking "Calculate Demurrage" under "HBL Charges".

HBL Charges			<input type="button" value="Calculate Demurrage"/> <input type="button" value="E-Guarantee Selected Charges"/>
<input type="checkbox"/> Description	Rate	Amount	
<input type="checkbox"/> Import Labor/Transportation Charge	\$8.50/CBM \$8.50/800 LBS quantity 20.00	\$170.00	
<input type="checkbox"/> Import Demurrage Fee	\$20/CWT \$2.50/CBM quantity 12.24 minimum \$50	\$244.71	
<input type="checkbox"/> Import Demurrage Fee	\$20/CWT \$2.50/CBM quantity 12.24 minimum \$50	\$244.71	
<input type="checkbox"/> Import Demurrage Fee	\$40/CWT \$5.00/CBM quantity 12.24 minimum \$95	\$489.42	
<b>Selected Total</b>		<b>\$0.00</b>	

You will then be presented with the following dialog to enter your estimated pickup date.

**Calculate Demurrage**

Estimated Pickup Date

mm/dd/yyyy

July 2023

↑ ↓

S	M	T	W	T	F	S
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Clear Today

Cancel Calculate

\$244.71

\$489.42

\$0.00

Pressing the icon will display a date picker. Once you press “Calculate”, the charge list will update to display any applicable demurrage fees.

## Making Online Payments

Charges can be paid online through our payment partners. Look for and click on the PayCargo logo to be taken to their payment site.

## Managing Invoices

Access your account invoices at any time by clicking on the “Invoices” button in the top-right navigation bar.

**CODA** | customer portal

Search by file, MBL, HBL, IT, AMS, or container number...

MBLs Invoices

**Invoices**

Invoice Number	Invoice Date	Due Date	Amount	Balance Due	Status
1000497	5/25/23	6/24/23	\$935.00	\$935.00	Unpaid

All currency is USD.

Page 1 of 1

Invoices are ordered newest to oldest, and a detailed PDF version of a single invoice is accessible by clicking directly on an invoice number.