HOW-TO-GUIDE

DOMESTIC DELIVERY SERVICE

OCTOBER 2020
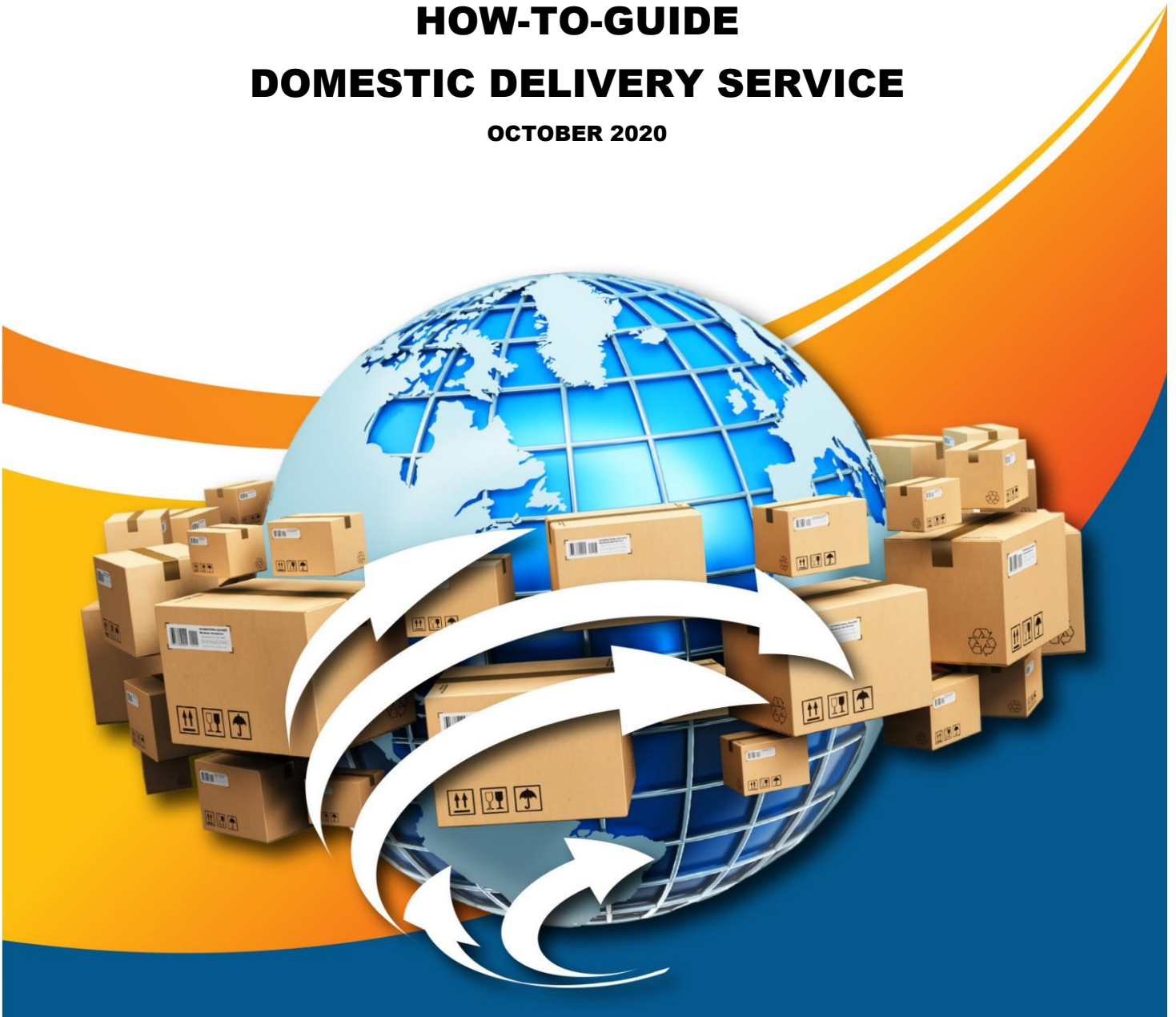
CONTENTS

REGISTERING AS A MERCHANT

1. **A potential Merchant can register for a Merchant Account on CSF's Website:**

   www.csfcouriersltd.com

2. **Go to "Register Here" near the top right-hand side of the CSF Website. See Fig 1**

Fig 1

3. **Click on "Become a Merchant" as illustrated in Fig 2;**

Become a Merchant

- **What is it?** CSF offers a domestic delivery service for citizens of Trinidad and Tobago. If you own a business and are looking for ways in which you can deliver your products to interested buyers, you can use this service.
- **Cost?** Registration is free! Our delivery packages start as low as TTD25.00 to all of our delivery locations.
- **Length of Time?** Print your labels and request delivery 24-72 hours guaranteed from pickup date.
- **Benefits?**
  1. Access to CSF's delivery fleet to deliver your package anywhere in Trinidad and Tobago at a low price.
  2. You can use multiple pickup locations for your packages.
  3. CSF can collect payments on your behalf (no cash, all payments CSF collects from your customers will include a 5% processing fee), but you can also make arrangements with your customers for payments.
- **CSF Online Shopper?** CSF can promote your products on our Social Media Pages (for a nominal fee) and offer to assist other customers in purchasing your items through our Online Shopper service.
- **Live Tracking of Packages?** Yes
- **Ocean Facility?** No
- **Cash Payments?** No
- **Online Payments?** Yes, through your Member Dashboard We accept PayPal, Square, and Amazon Pay.
- **Credit Card/Linx Payments?** Only through our Couriers
- **Customer Support** Office: 225 - 4CSF (225 - 4273) OR 225 - 5273

Register Now

Become a Member

- **What is it?** CSF is at its core an international skybox provider. If you wish to purchase items from international retailers, we provide you with a US Skybox Postal Address to send the packages. We Bring the World to You!
- **Cost?** Registration is free! You pay based on the package, and you can use our one calculator to estimate the cost;
- **Length of Time?** 2-5 business days delivery time when collected in Miami to your Trinidad address. 4-7 business days for pickup or delivery in Tobago
- **Benefits?**
  1. Ability to purchase from international retailers.
  2. We accept online Payments (VISA/Master/ Amazon Pay and PayPal).
  3. Your online dashboard with much more after registration.
- **CSF Online Shopper?** CSF will now assist our customers with no access to a credit card (or customers who would prefer not to use their cards online) to make online purchases. We will use our credit card facilities to purchase the item(s) on your behalf. NB this service is only being offered for Amazon purchases in the first instance
- **Live Tracking of Packages?** Yes
- **Ocean Facility?** Yes
- **Cash Payments?** No
- **Online Payments?** Yes, through your Member Dashboard We accept PayPal, Square, and Amazon Pay.
- **Credit Card/Linx Payments?** Only through our Couriers
- **Customer Support** Office: 225 - 4CSF (225 - 4273) OR 225 – 5273
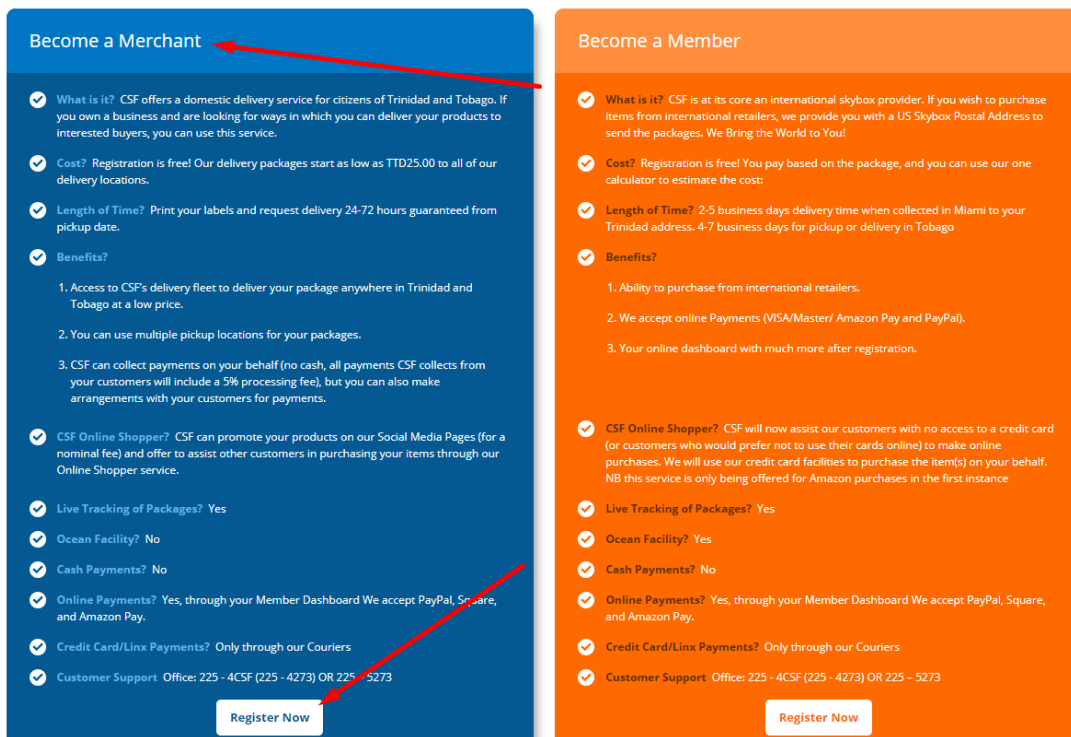
Register Now

Fig 2

4. **You will then be redirected to the Registration Page. Fill out the form with accurate information. See form in Fig 3.**
   If you do not have a Business Name, your own name can be used.

Fig 3

5. **An E-mail confirmation will be sent to the e-mail address you provided. This email will have all of your necessary Account Information:**
   a. **Merchant Agreement;**
   b. **Merchant ID (TM0001, there will be no (-) just numbers);**
   c. **Log in credentials, etc.**

6. **When changes are made to the Merchant's Agreement, a pop-up notice will be shown when you log into your Profile.**

YOUR MERCHANT'S PANEL

1. **Login**

   To login go to the Merchant's Login:

   http://www.csfcouriersltd.com/merchants

Fig 4

Key:

1. **Enter your Merchant ID. For example, TM00005. This is sent in the welcome email along with your temporary password.**
2. **Enter your temporary password.**
3. **Remember Me checkbox allows the website to remember/save your login credentials, so that on next login you would not have to enter this information again.**
4. **Forgot password link (Click here), is the process used to reset your password. When you click on "Click here" a popup box asks for your email. Once that is provided, an email will be send to you with a temporary password. After logging in, it is recommended that you change your password.**
5. **The Login button logs the merchant into the Merchant Panel, which we will be showing you in the next section.**

YOUR DASHBOARD

The Merchant's Dashboard basically gives and overview or summary of the Merchant's account. In this section, we will be going through all that is shown on the dashboard of the Merchant Panel.

Fig 5 shows how to expand the left panel to see the names of the tabs.
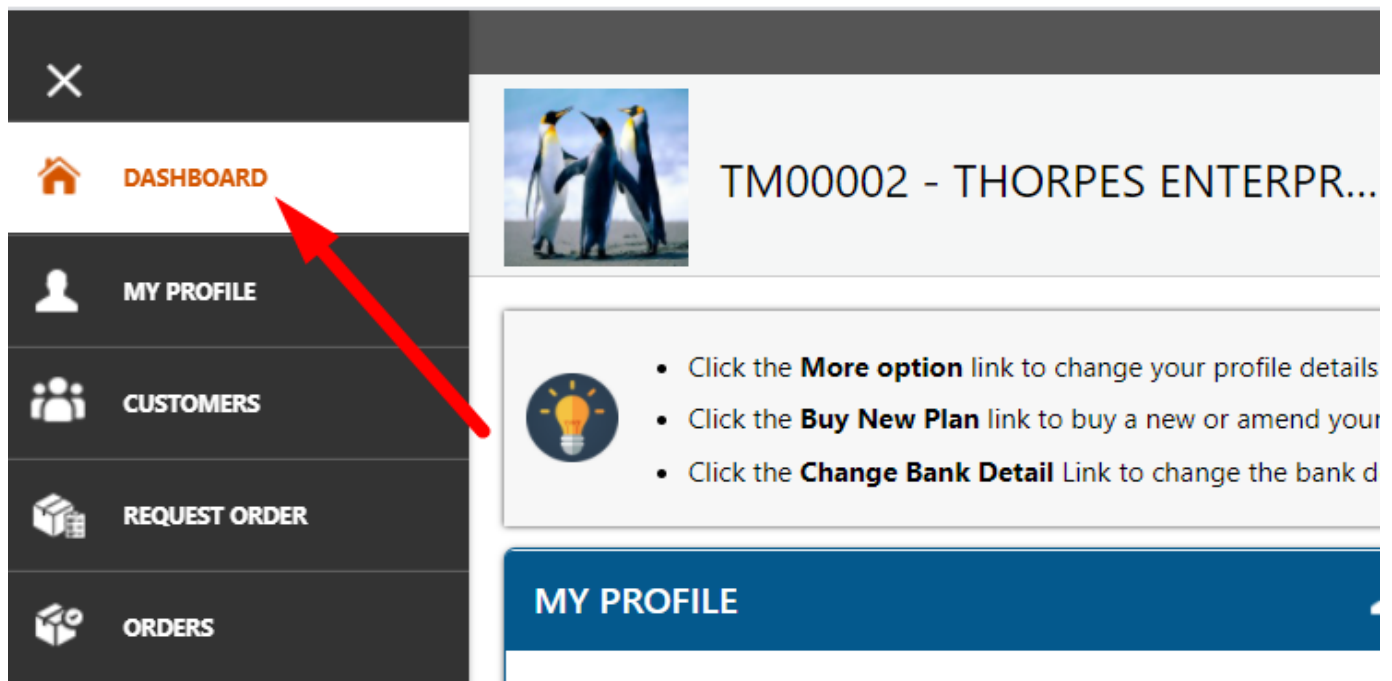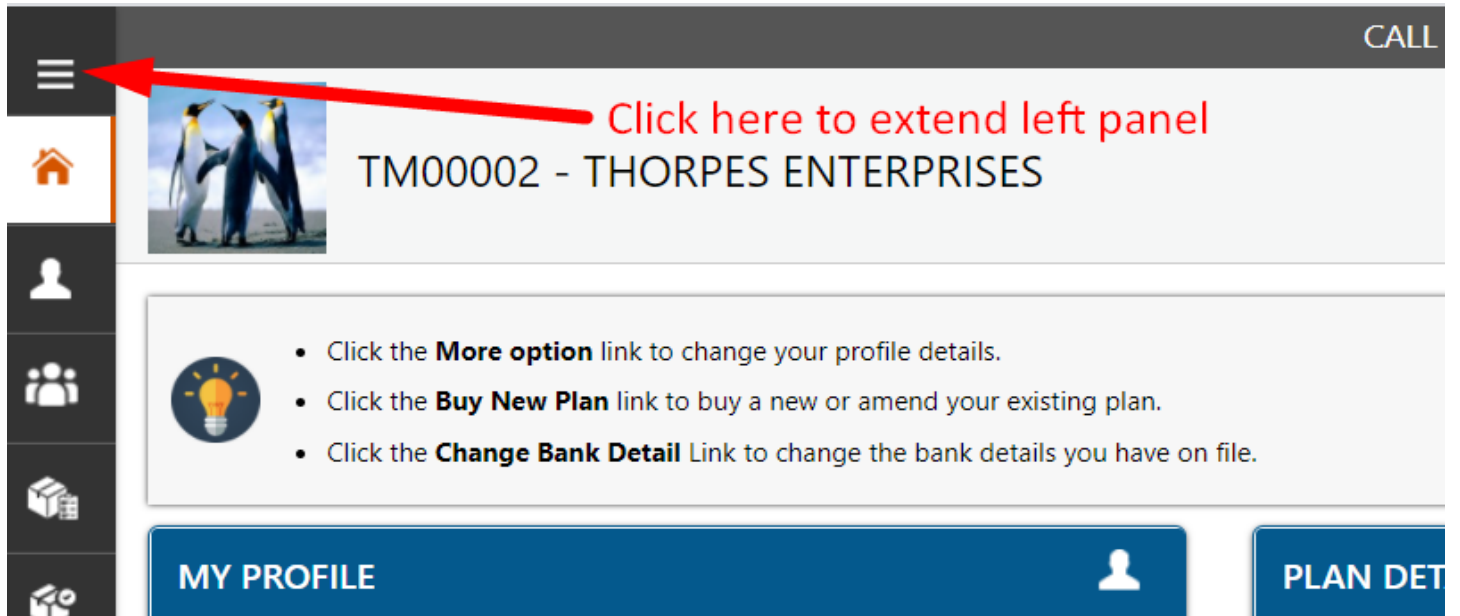
Fig 5
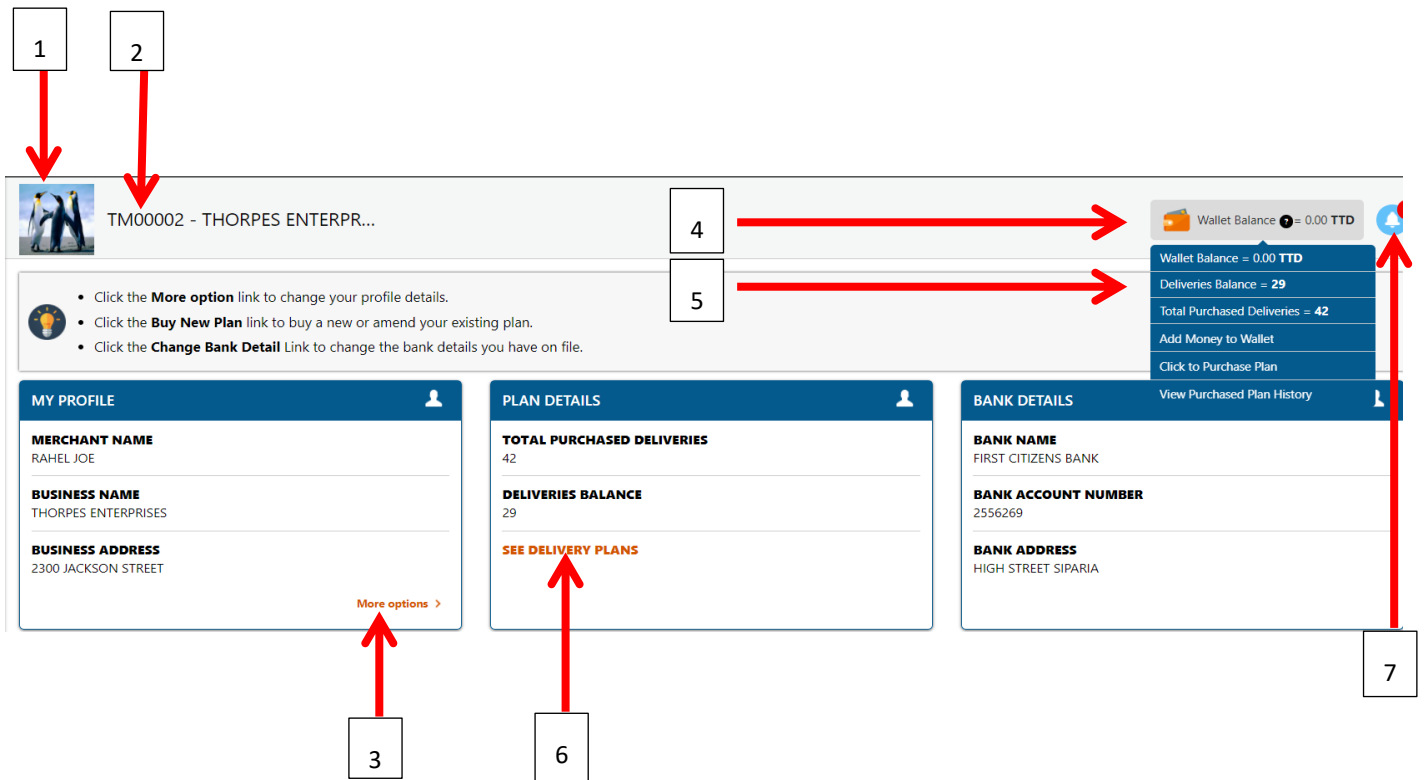
Fig 6 *Dashboard Illustration*

Key:

1. Your Profile Picture or Company's Logo. This picture will be shown on package labels.
2. Your ID number and Name.
3. The "More Options" for "My Profile" takes you to your profile information. There you can update your information such as, Email Address, Contact Number, Credit Card information, etc.
4. Your wallet is used to make purchases on the site. Transfer money to your wallet to purchase subscription plans, insurance and even pay for Tobago deliveries.
5. Once you click on the Merchant's Wallet, you will see your <u>Wallet Balance</u> as well as your <u>Subscription Balance</u> and plan payment history.
6. The "See Delivery Plans" for "Plan Details" takes you to "Our Subscription" page where you can purchase the number of labels you need for the packages you wish to be delivered.
7. Notification Bell shows all notifications regarding your account. Here is where you will see alerts for items that have been picked up, dropped off, paid for, etc.

YOUR PROFILE
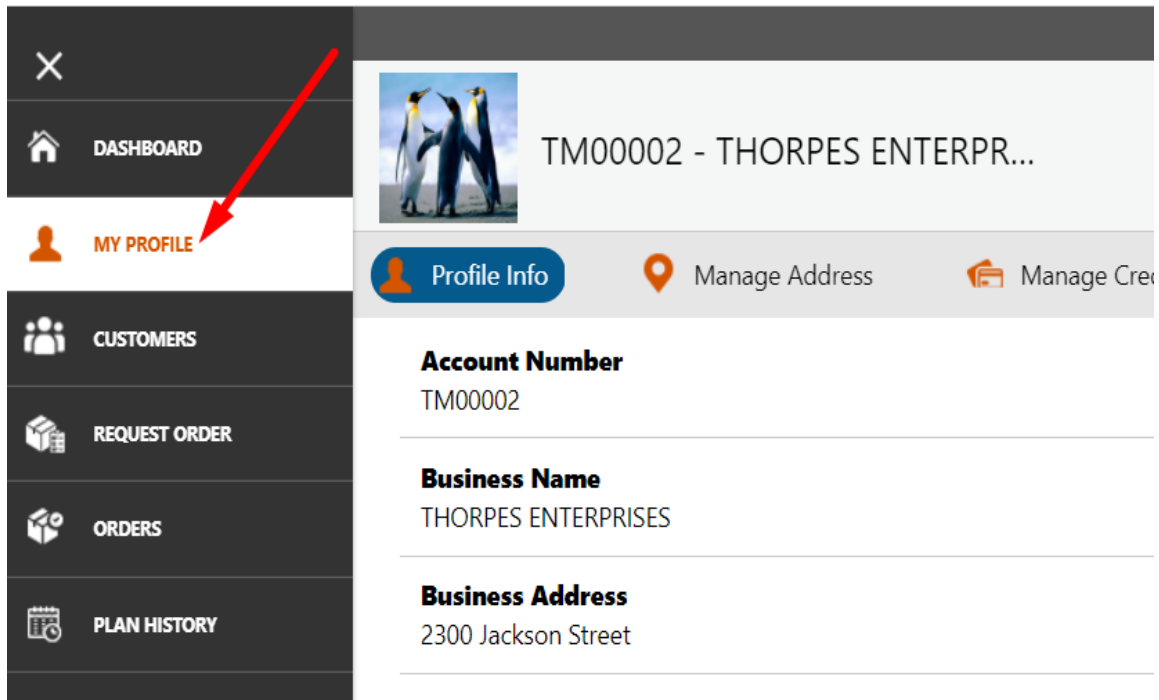
Fig 7

1. **Profile Info – Allows you to view and update your account information. To edit your profile, follow these simple steps:**

   a. **Click on "Edit Profile"**
   b. **In the form, edit the information that needs to be changed/updated**
   c. **Once editing is complete, click on save to store updated information. Clicking "Back" button will carry user to previous page without saving the information. See Fig 8 and Fig9**

Area to view Profile Information

TM00002 - THORPES ENTERPR...

| Profile Info | Manage Address | Manage Credit Card | Bank Details | Our Subscription | Change Password |

Account Number
TM00002

Business Name
THORPES ENTERPRISES

Business Address
2300 Jackson Street

Business Contact Number
868-888-5548

Business Email Address
j.doe@csfcouriersltd.com

Name
JANE JOE

Email
j.doe@csfcouriersltd.com

Date Of Birth
05-Feb-1980

Gender
Male

National ID Type
National ID

National ID No
19800205712

Phone No
-

Mobile No
868-888-5548

Profile Picture

Edit Profile

Takes you to the "Edit Profile" Page

Fig 8

TM00002 - THORPES ENTERPRISES

Edit Profile

Profile picture

12d21ed-penguins.jpg
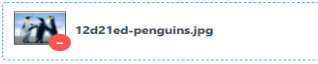
(jpg, jpeg and png file only)

Click here to add logo or profile picture

First Name *	Last Name *	Email *
JON	JOE	j.doe@csfcouriersltd.com

Phone No	Mobile No *	Date of Birth *
1-868	868-888-5548	05-Feb-1980

National ID Type *

National ID

National ID No *

19800205712

Gender
● Male ○ Female

Business Name *

THORPES ENTERPRISES

Business Address *

2300 JACKSON STREET

Business Email Address *

j.doe@csfcouriersltd.com

Business Contact Number *

868-888-5548

Save   Back

Click back to go to the previous page without saving any changes made to profile

Click on save to store any changes made to profile

Fig 9

SETTING UP YOUR COLLECTION POINTS

1. **Here you have ability to add one or more pickup locations:**

TM00002 - THORPES ENTERPRISES

| Profile Info | Manage Address | Manage Credit Card | Bank Details | Our Subscription | Change Password |

+
ADD NEW ADDRESS

OTHER

2300 JACKSON STREET SANTA CRUZ ZONE 26

⦿ Default Address   Edit

Click here to edit default address

Click here to add new pickup address

Show the details of default address

Fig 10

2. **Add address as instructed in Fig 11 below:**

TM00002 - THORPES ENTERPRISES

Add New Address

Address Title *

Please select address title

Full out the necessary address information in these fields

Full Address*

ENTER YOUR FULL ADDRESS

City *

Type or Select City here

☐ Default Address

Tick Default Address checkbox if address entered is to be the main address

Save   Back

Click back to go to the previous page without saving

Click on save to store address information

Fig 11

3. **Editing an address is pretty simple.**
   a. **Click on the edit button of the address you wish to edit.**
   b. **On the edit address page, make the necessary adjustments.**
   c. **When change is complete, ensure to click on save to store the new information. See Fig 12 (A) and Fig 12 (B).**

| 👤 Profile Info | 📍 Manage Address | 💳 Manage Credit Card | 🏛 Bank Details | 📅 Our Subscription | 📅 Change Password |

```
+                              OTHER
ADD NEW ADDRESS               2300 JACKSON STREET SANTA CRUZ ZONE 26

                              ⦿  Default Address                    Edit
```

Fig 12

TM00002 - THORPES ENTERPRISES

Edit Address

Address Title *	Other Address Title *
Other	Enter your address title

Full Address*	City *
2300 JACKSON STREET	SANTA CRUZ

☑ Default Address

Save   **Back**
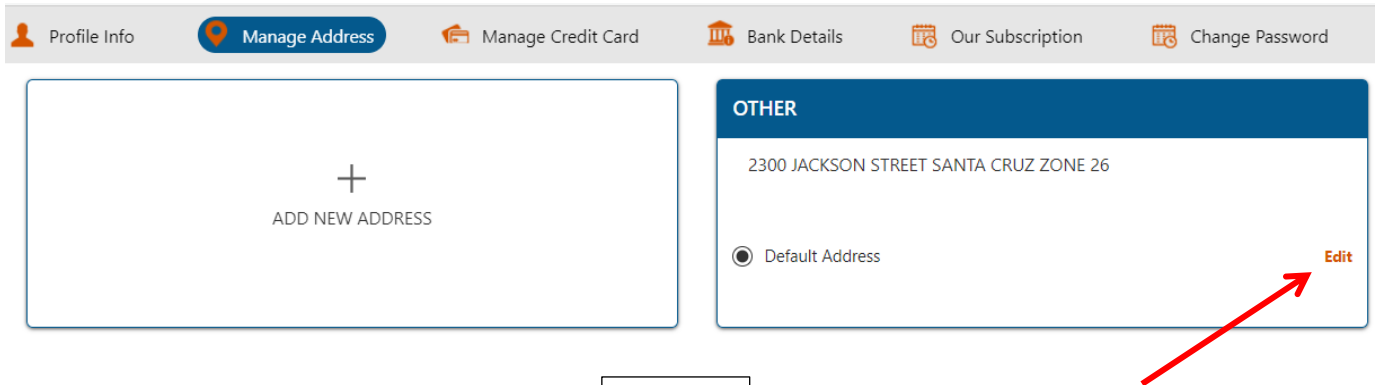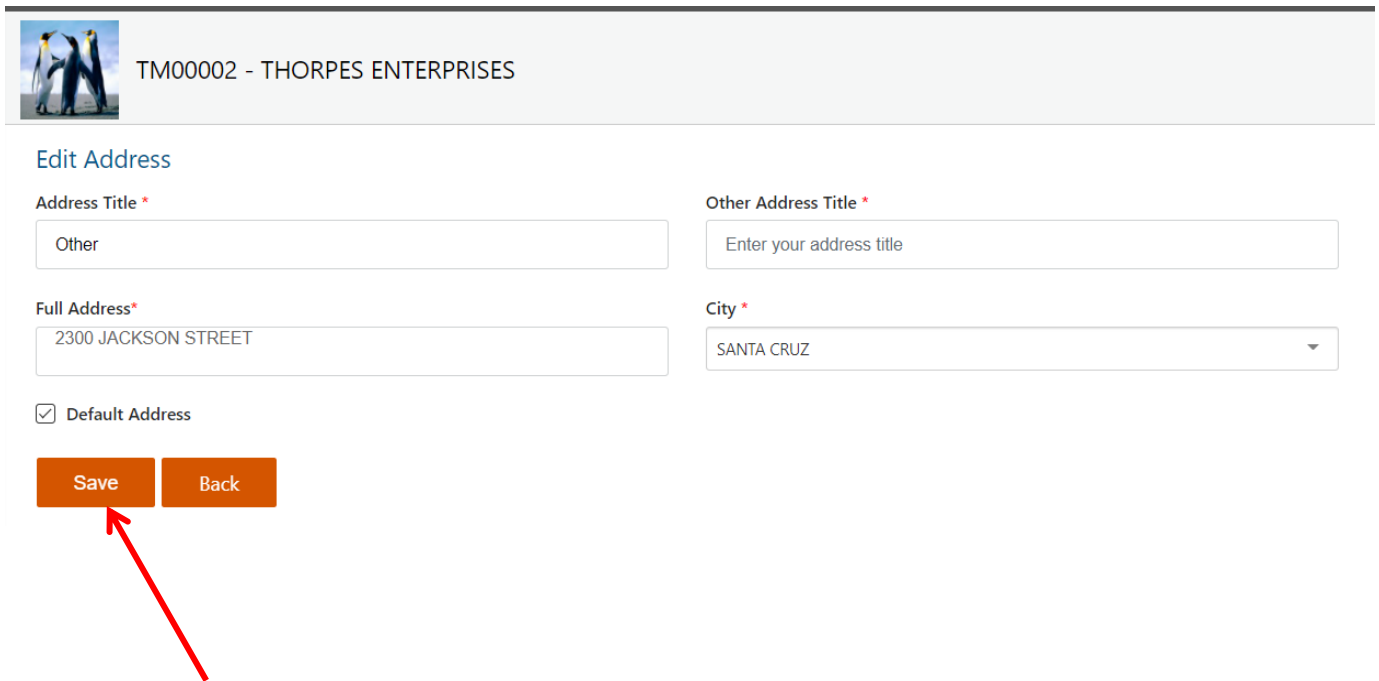
Fig 12

ADDING YOUR CREDIT CARDS

You can also add you credit card to make online payments. Here are the steps to adding your credit card:

    a.   **Click on "Manage Credit Card" tab within the profile tab.**
    b.   **Select "Add Credit Card" as shown in Fig 13 (A).**
    c.   **Fill out the form shown in 13 (B) with accurate card information.**
    d.   **Click on "Save" to store credit card information. Clicking the Back button takes you to the previous page without save any information.**

TM00002 - THORPES ENTERPRISES

| Profile Info | Manage Address | Manage Credit Card | Bank Details |

+
ADD CREDIT CARD

a

b

Fig 13 (A)
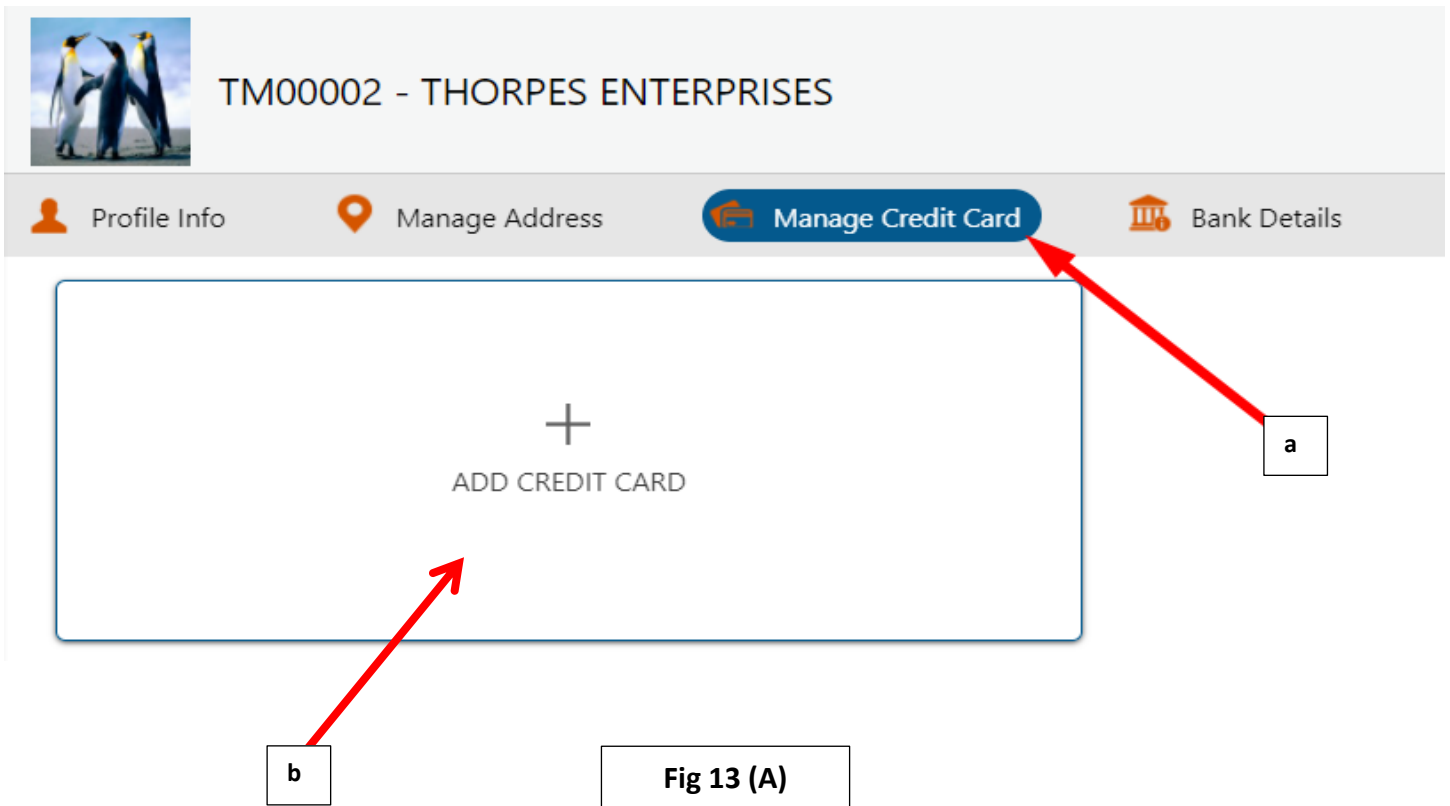
Card Number *	Card Holder Name*	Business or personal card name*
•••• •••• •••• ••••	Enter card holder name	Enter business or personal card name

Valid Upto *	CVV *
MM/YY	CVV

Postal Code *

33195

Save   Back

c

Fig 13 (B)

ADDING YOUR BANK DETAILS

1. In "Bank Details" tab, you can add your Bank Details. This will be used when CSF has to transfer payments to you when we collect payment from customers on your behalf.
2. If You want CSF to collect payment for the item(s) being delivered, CSF will charge 5% of item cost as a fee.
3. You will receive your payments (less CSF's charge) on Tuesday of the following week.
4. To add bank details, do the following:
   a. Click on "Bank Details" tab
   b. Click on "Edit"
   c. Full out the form with accurate information
   d. Tick "Set as Primary" if you have multiple banking details and would like to make this bank your default account
   e. Hit "Save" to store bank information. See Fig 14 (A) and Fig 14 (B)

Fig 14

Fig 14

After you click Save, you will see a pop-up confirmation that the bank details were saved Fig 15.
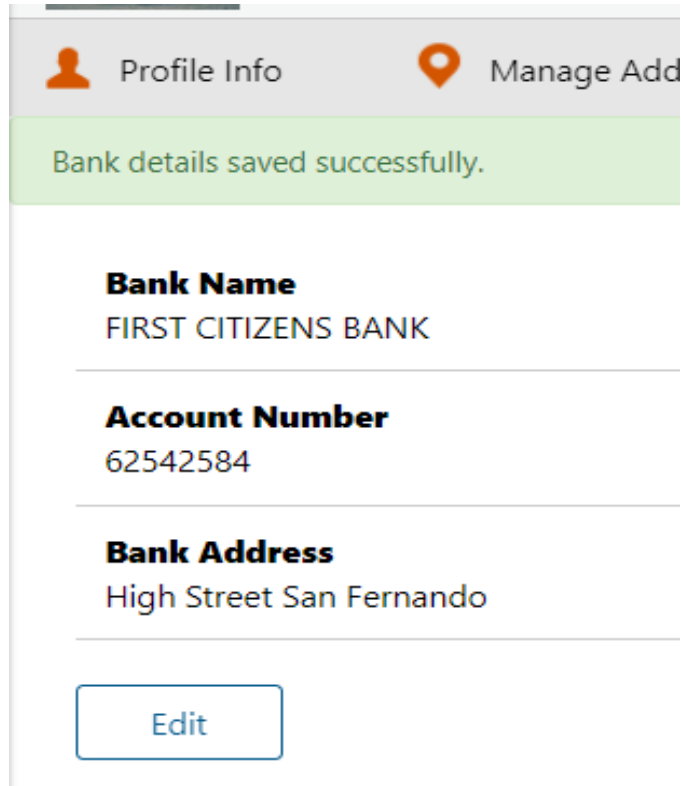
Fig 15

YOUR SUBSCRIPTIONS

1. In the "Our Subscription" tab, you can subscribe for a package deal. This means the number of labels you wish to purchase at that time.

2. To purchase a plan, follow these steps:
   a. Enter the amount of label(s) to be purchased
   b. Select desired payment method:
      i. If payments are made via PayPal or Amazon Pay, ensure that you have an existing PayPal/Amazon account.
      ii. If you are paying via online credit card/visa card (Square) but have not yet added a credit card to the account, at this point you will be guided to do so and then confirm payment once card is added.
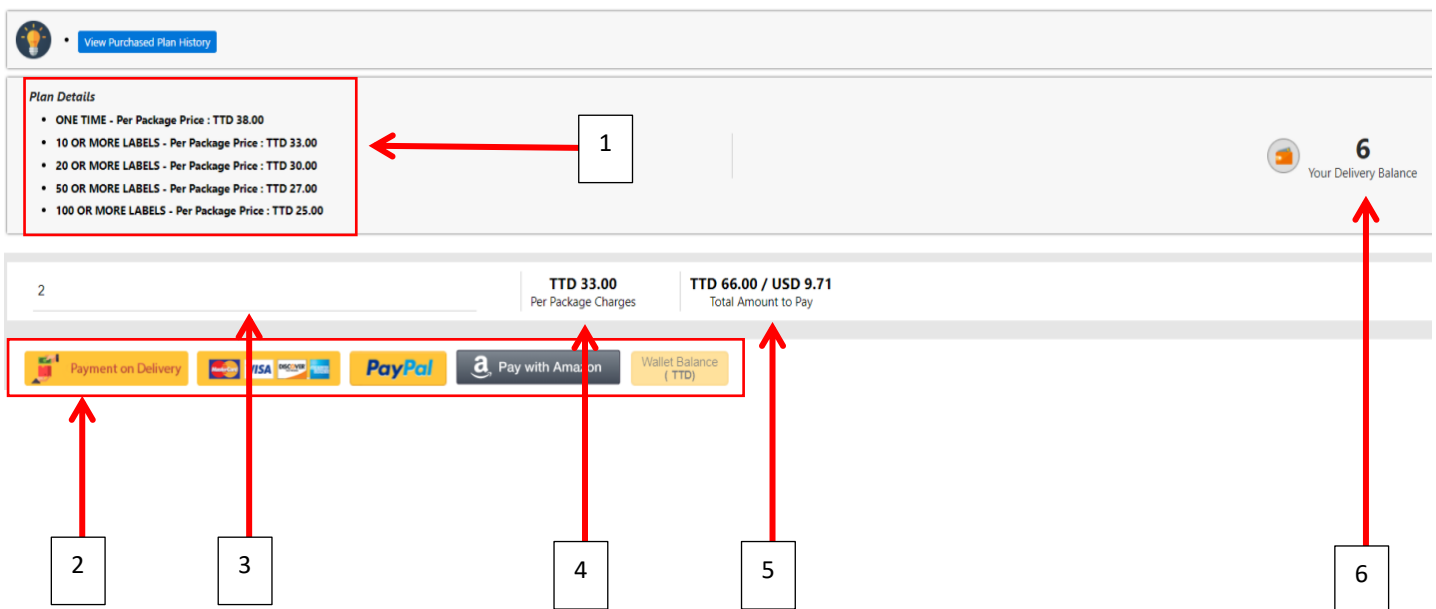
Fig 16

Key:

1. **Plan details – Shows a breakdown of the subscription plans available.**
2. **Payment method – These are the methods in which you can purchase any one of our plans. They are:**
   a. **Payment on Delivery (debit, credit card via linx)**
   b. **Online credit card payment**
   c. **PayPal**
   d. **Amazon Pay**
   e. **Merchant's Wallet**
3. **Amount field – here is where you enter the amount of label(s) you wish to purchase.**
4. **Shows the TTD Value per label for the amount entered in point 3.**
5. **Shows the total TTD/USD Value for the amount entered in point 3.**
6. **Delivery Balance is the number of labels you have remaining to be used.**

CHANGING YOUR PASSWORD

1. **The last thing you can do in the "My Profile" tab, is change your password. To change your password follow these quick and easy steps:**
   a. **Click on "Change Password" tab.**
   b. **Enter old password in field.**
   c. **Enter new password in field.**
   d. **Instructions on adding new password.**
      i. **Passwords must be between 8-12 characters**
      ii. **Have at least 1 number and 1 speci@l character**
      iii. **Have at least 1 upper and lower case letter**
   e. **Confirm/re-enter new password in field.**
   f. **Click "Submit" to save new password.**

Fig 17

ADDING YOUR CUSTOMERS

1. **In this section we will be going all the aspects of the customers tab**
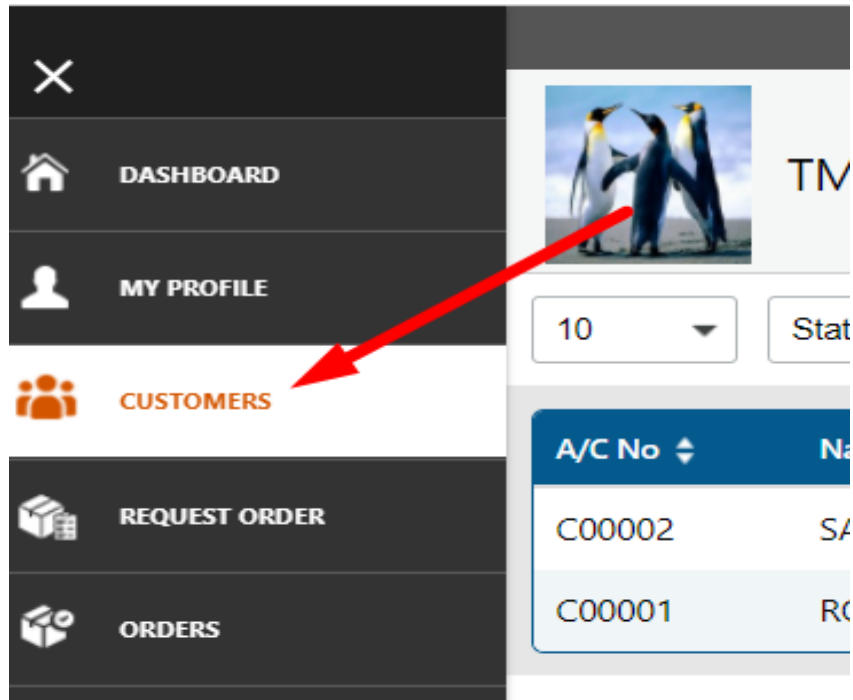
Fig 18

2. **In the Customers' Tab, you have the ability to:**
   a. **Add customers to your account as clients (there is no limit to this).**
   b. **Edit your customer's account.**
   c. **Import customers into database using an excel file.**
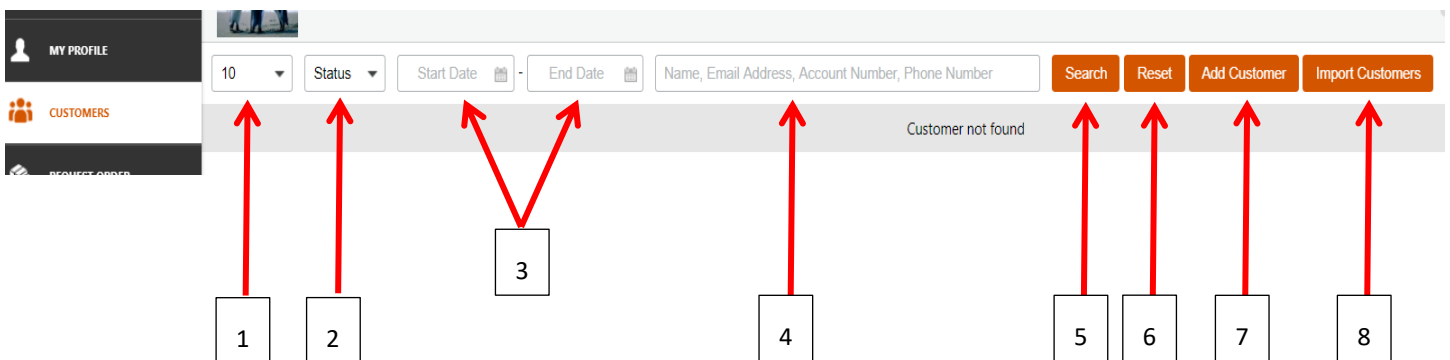
Fig 19

3. **Fig 19 shows the following:**
   a. **Number of customers that can be shown on 1 page at a time.**
   b. **Status, that shows If the customer is active or inactive.**
   c. **Date filters that filters the number of customers added in a particular date range.**
   d. **Search bar, where merchants can search for customers based on Name, Email Address, Account number or phone number.**
   e. **Search button. Once the filters are set and the merchant selects the search button, it pulls the information based on the filters selected.**
   f. **Reset sets filters back to default value.**
   g. **Add customer is used to add a new customer.**
   h. **Import customers is used to import multiple customers at the same time using an excel file.**

4. **To add a customer, do the following:**
   a. **Click on "Add Customer". See Fig 20.**
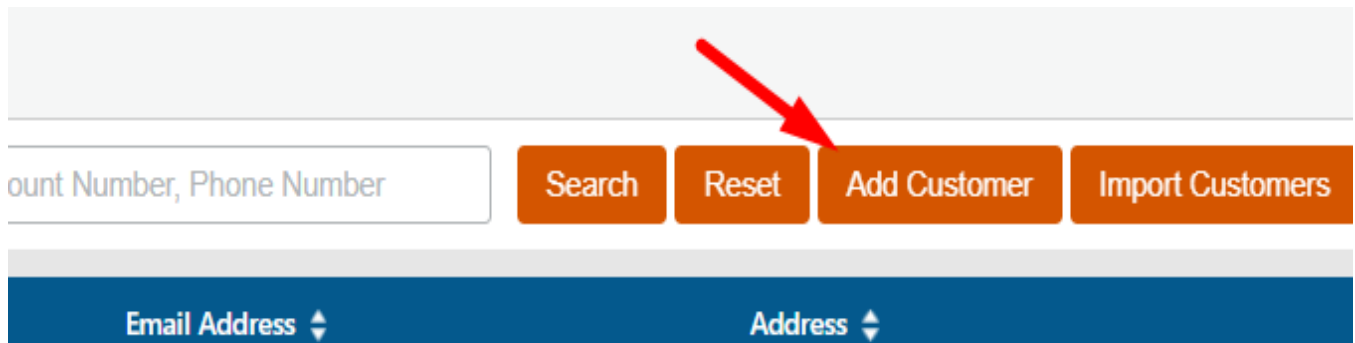
Fig 20

   b. **Fill out the information in the form shown in Fig 21 and click on "Save" (* means mandatory field):**
      i. **First Name ***
      ii. **Last Name ***
      iii. **Email Address**
      iv. **Mobile No. ***
      v. **Phone No.**
      vi. **Address Line 1 ***
      vii. **Address Line 2**
      viii. **City ***

Fig 21

5. **Instead of adding customers one by one, you can also add multiple customers at once by following these very simple steps:**

   a. **Click on "Import Customers" shown in Fig 22.**
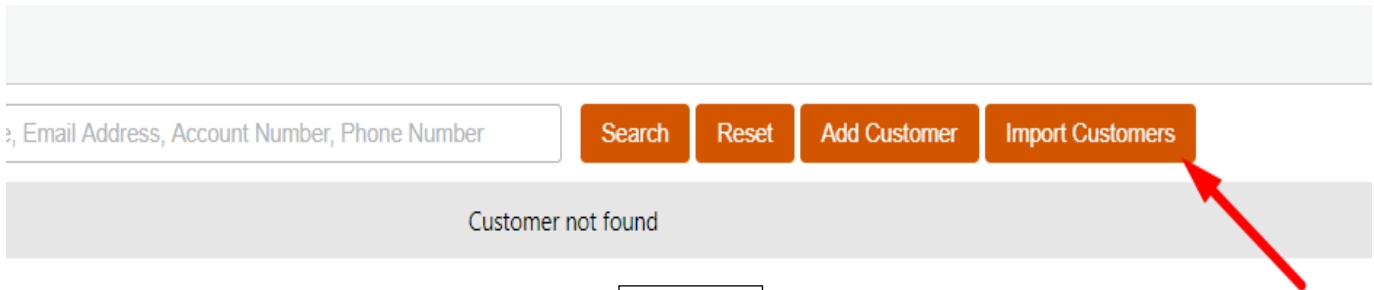
Fig 22

   b. **Click on "Download sample import file" to set up the Excel Template to be used for importing as shown in Fig 23.**
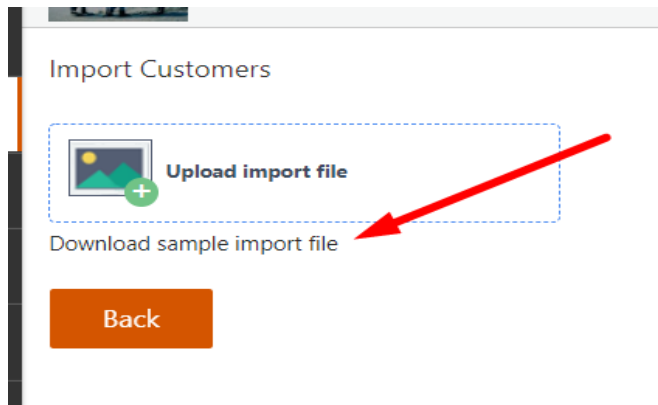
Fig 23

   c. **Open downloaded file (Fig 24) and add customer's information. The first line on the sheet shows an example of the information needed for each customer (Fig 25).**
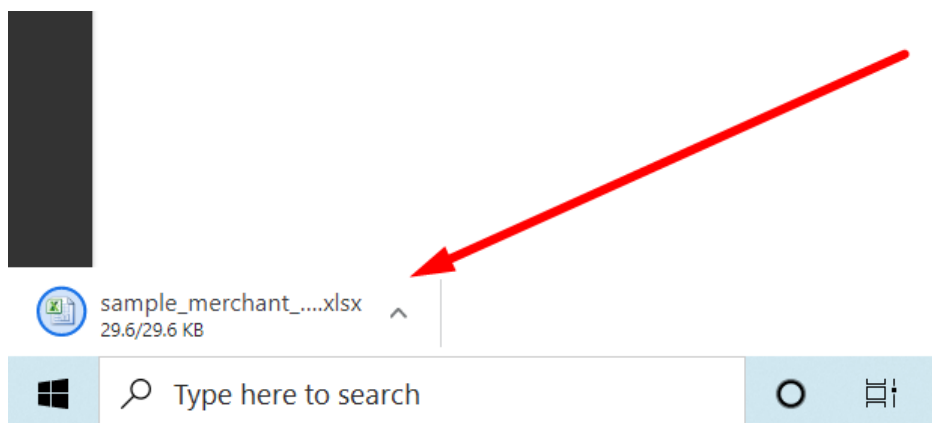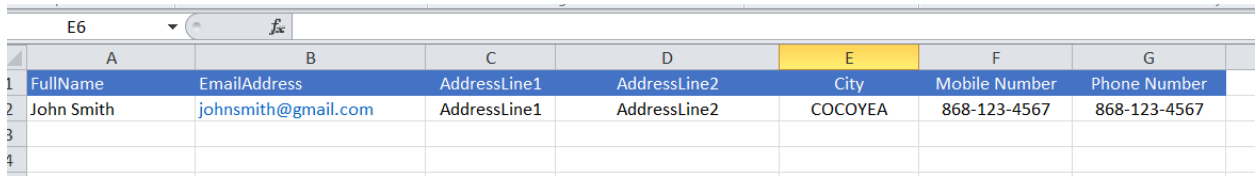
Fig 24

	A	B	C	D	E	F	G
1	FullName	EmailAddress	AddressLine1	AddressLine2	City	Mobile Number	Phone Number
2	John Smith	johnsmith@gmail.com	AddressLine1	AddressLine2	COCOYEA	868-123-4567	868-123-4567
3							
4							

Fig 25

d. When you finish adding all your customers' information in the file, save document. Click on "File" then "Save As".
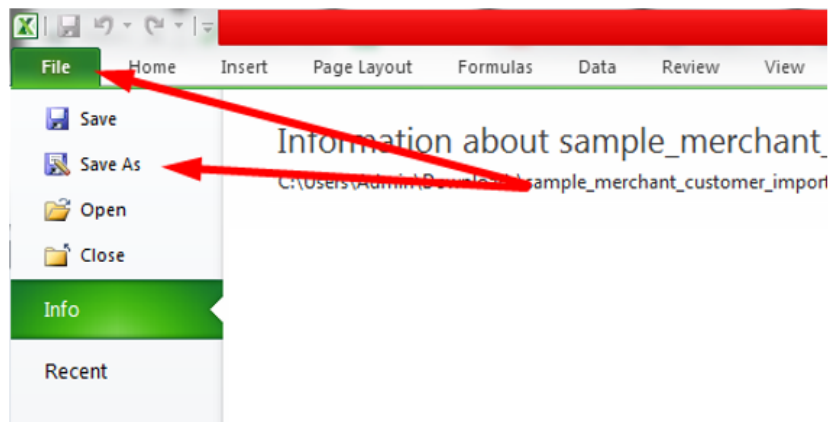
Fig 26

e.   **Rename file, select where you would like to save the file and click "Save".**
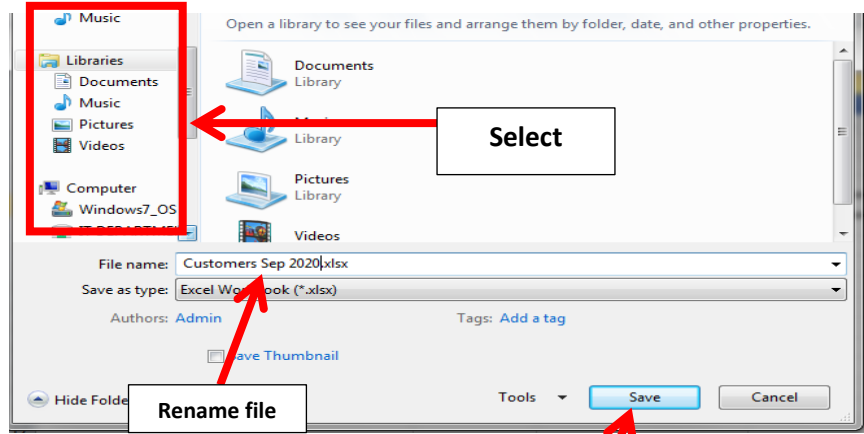
Fig 27

f.   **Go back to Merchant Panel > Customers > Import Customer and click on "Upload Import File".**
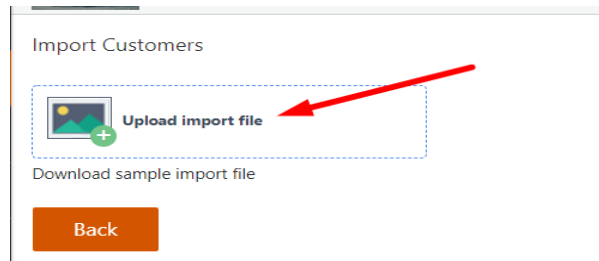
Fig 28

g. **Go to the location where the file was sorted, select the file and click on Open.**
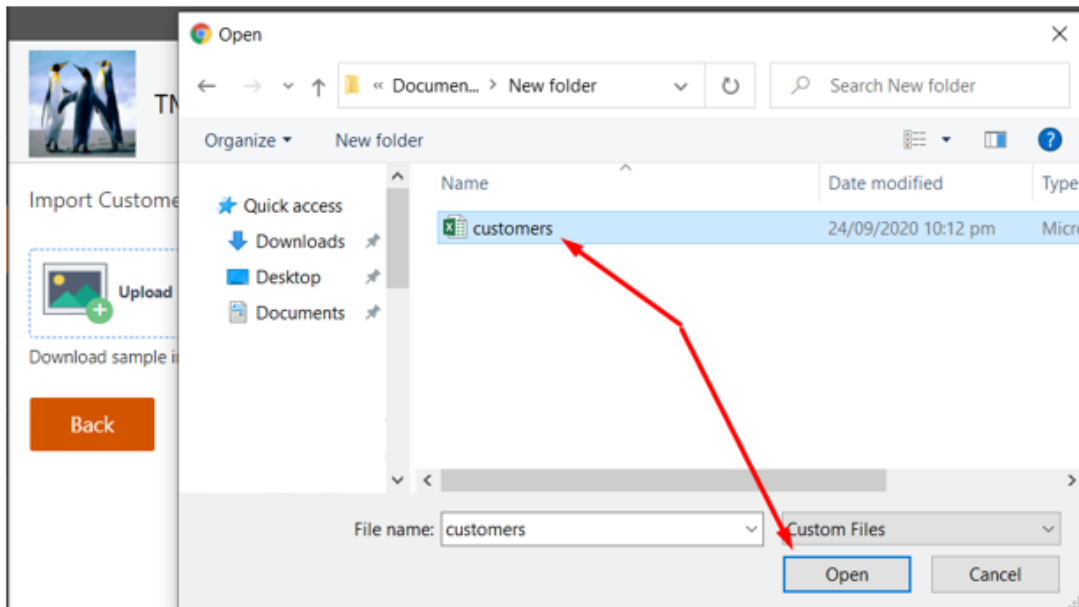
Fig 29

h. **Select "Import".**
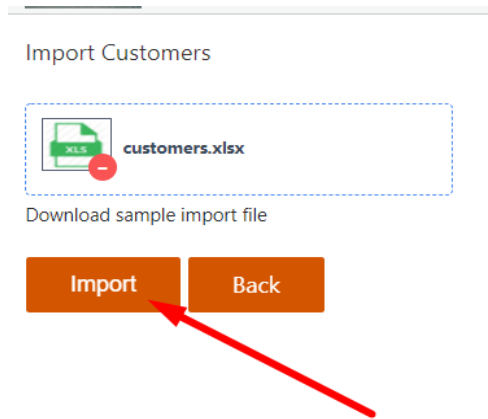
Fig 30

REQUESTING AN ORDER

1. **In this section we will be showing merchants how to go about requesting an order. See below steps:**
   a. **Request an Order - Merchant will have to click on "Add Request Order":**
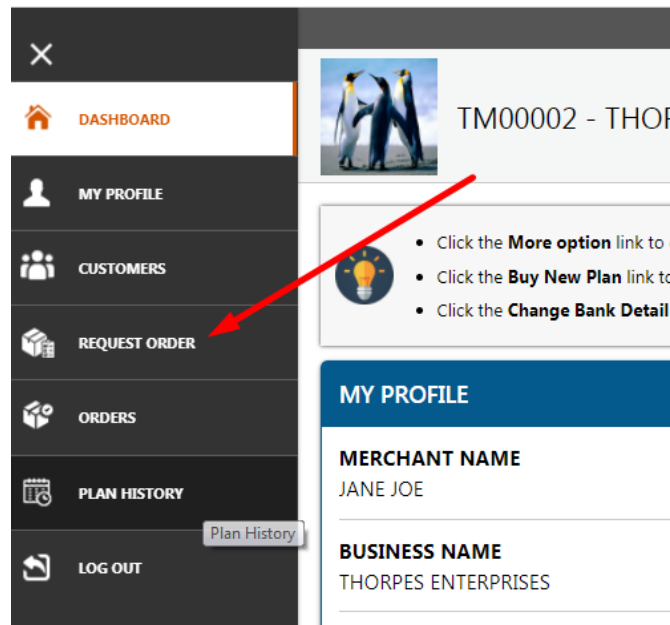
Fig 31
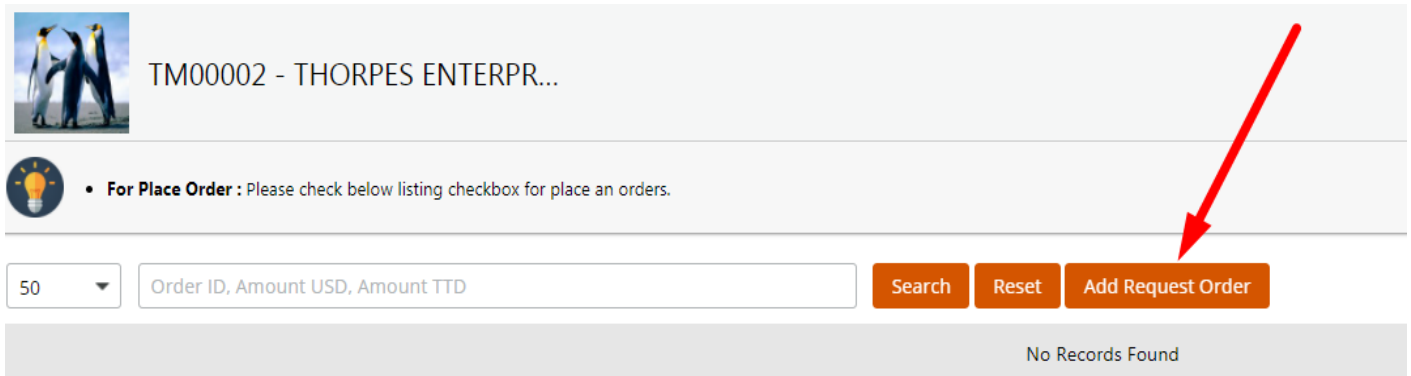
Fig 32

b. **Pickup Details – Choose the address that CSF will be picking up the package.**
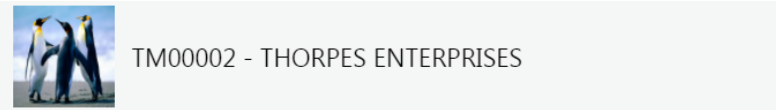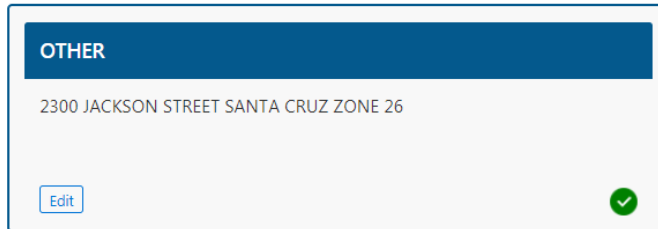
Fig 33

c. **Customer Details – Select the customer in the drop-down list. Once customer is selected, the customer's address will automatically appear (edits can be made on the address).**

Fig 34

d. Item Details – Click on "Add Item" to add details of the item to be collected/dropped off.

Items Details

Add Item

#	Item Description	Quantity and Full Description

Fig 35

Add Item

Description of the item*

CLOTHING

| CLOTHING |
| COFFEE |
| COFFEE GRINDER |
| COILS |
| COLONGE |
| COMPASS |
| COMPRESSOR |

Quantity and Full Description*

Value(TTD)*

Estimated Value of Shipment. (n.b. The value placed here is w
will be used to calculate the fee for insurance, which is option

Fig 36

f. Enter the full description of the item in the "Quantity and Full Description" field.

Add Item

Description of item*

CLOTHING

Quantity and Full Description*

2 JEANS, 3 SHIRTS

Weight(LBS)*

Value(TTD)*

Maximum Weight Allowed = 60LBS

Estimated Value of Shipment. (n.b. The value placed here is what
will be used to calculate the fee for insurance, which is optional).

Special Instructions

Add Item   Close

Fig 37

g.   **Enter the weight of the item. <u>Note that the maximum weight allowed per order is 60lbs.</u>**

Fig 38

h.   **Enter the value of the item. <u>This value will be used if you request Insurance.</u>**

Fig 39

i.   Enter any specific instruction for the delivery in the "Special Instructions" field. You can insert notes (example - customer is only available after 2pm on Wednesdays); this way CSF can schedule delivery accordingly. Once completed click on "Add Item".

Fig 40

j.   If you need the package insured click "Yes" if not, click "No".

Fig 41

k. If you want CSF to collect payments from your customers on your behalf, click "Yes", select you preferred bank for the bank transfer transaction and enter the amount to be collected. You will then see the total to be transferred minus the 5% fee.

Collect Payments

Would you like CSF to collect payment from customer?
◉ Yes ○ No

Select Bank Details *   (Primary) 2556269 - FIRST CITIZENS BANK   ▼   Update Bank Detail

Payment Amount(TTD)*   20

CSF Charges (5% of Payment)   1.00 TTD

Total Amount to be Transfered   19.00 TTD

Save Request Order   Back

Fig 42

l. If you wish to update you banking information before proceeding, simply click on the "Update Bank Detail button as shown below:

Would you like CSF to collect payment from customer?
◉ Yes ○ No

Select Bank Details *   (Primary) 2556269 - FIRST CITIZENS BANK   ▼   Update Bank Detail

Save Bank Detail

Bank Name *   **Bank Account Number** *
FIRST CITIZENS BANK   ▼

Bank Address *

High Street Siparia

Note : This bank detail will update when you confirm it.

Add New Bank Account   Save Bank Detail   Close

Fig 43

> **NOTE:**
> - **You are limited in terms of pkg weight; when adding an item(s) - it can be 1 item (auto part) that weighs 60 lbs. -> this means no other item can be added to the Request Order**
> - **If the Items are clothing or anything else that can be split - multiple items can be added to make up the 60 lbs. (this will be considered one (1) pkg)**
> - **There is no limit to how much packages you would like CSF to pick up.**

12. Once the item(s) is/are successfully added, click "Save Request Order"; the orders will be generated under Request Order Tab, or click "Back" to go back to the previous page without saving the order information

Collect Payments

Would you like CSF to collect payment from customer?

◉ Yes ○ No

Select Bank Details * (Primary) 2556269 - FIRST CITIZENS BANK ▼   [Update Bank Detail]

Payment Amount(TTD) * 20

CSF Charges (5% of Payment) 1.00 TTD

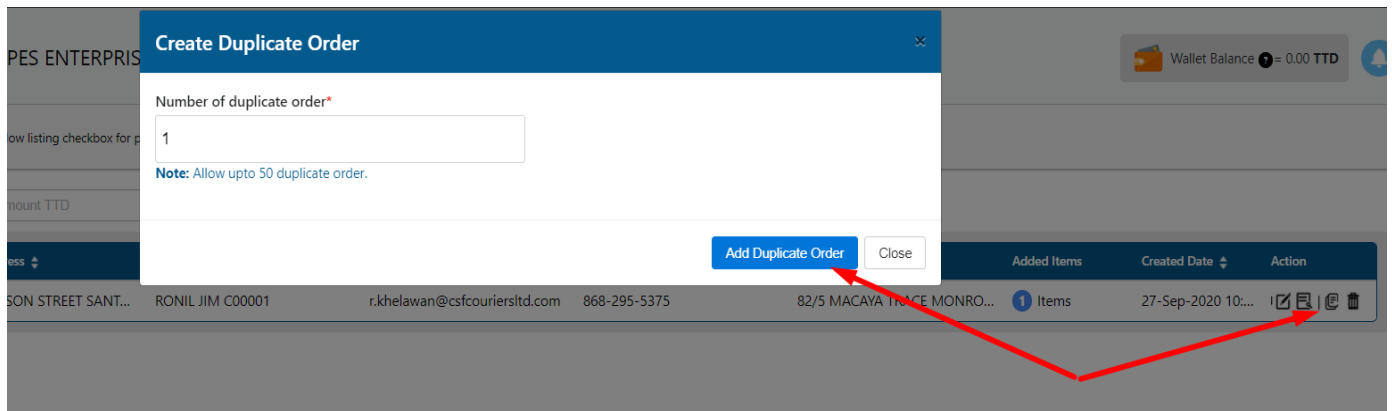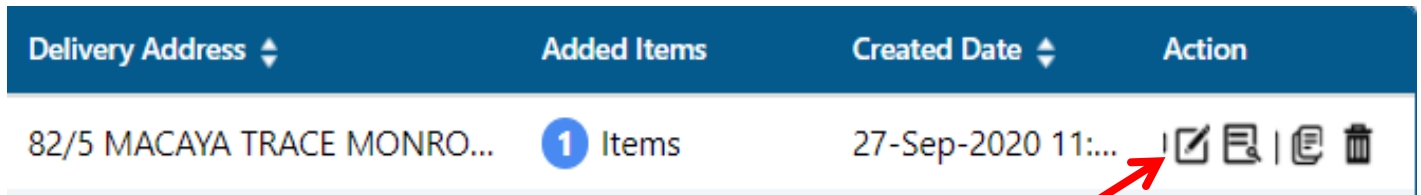**Total Amount to be Transfered** 19.00 TTD

[Save Request Order]   [Back]

Fig 44

You can duplicate orders, if it is the same items for their clients - eight (8) boxes of printing paper - each weigh 50 lbs.

Fig 45

You can also copy a previous order and simply edit your client's info (this will come in handy if they have multiple clients receiving the same orders).

Edit Button

Fig 46

You must select the necessary orders and select "Click for Review & Place an Order" (this is located to the top right of the dashboard).

Fig 47

Once selected a preview will be shown with the cost (the order can be edited or viewed at this point).

Fig 48

Order placed - you will now have to print out the label and stick to the package(s) - Your Name will be shown on the label if you do not have a Business Name set up.

To Print a label, go to:

- **"Orders" in left time**
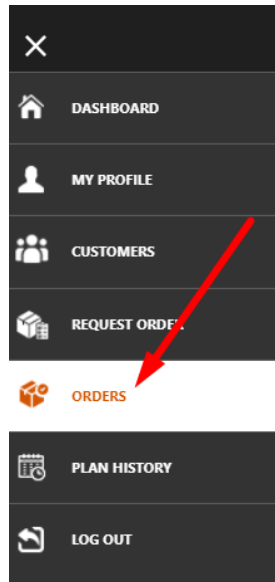

Fig 49

- **Click on Downloads icon in "Actions" column.**

Fig 50

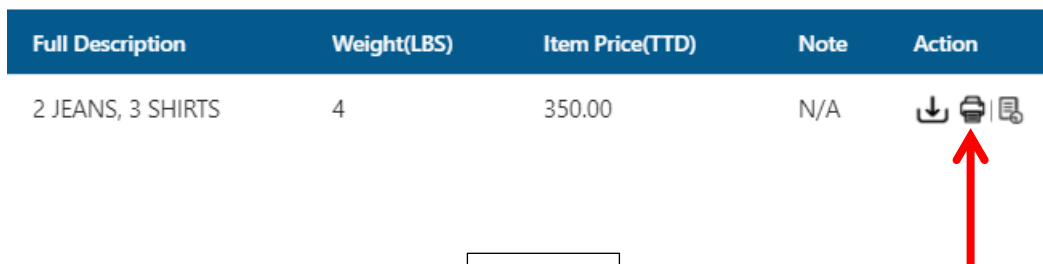- **In the popup box click on the "Print" icon under actions.**

Fig 51

- **Your label will then popup. Click on the printer icon again to print label from your PC.**
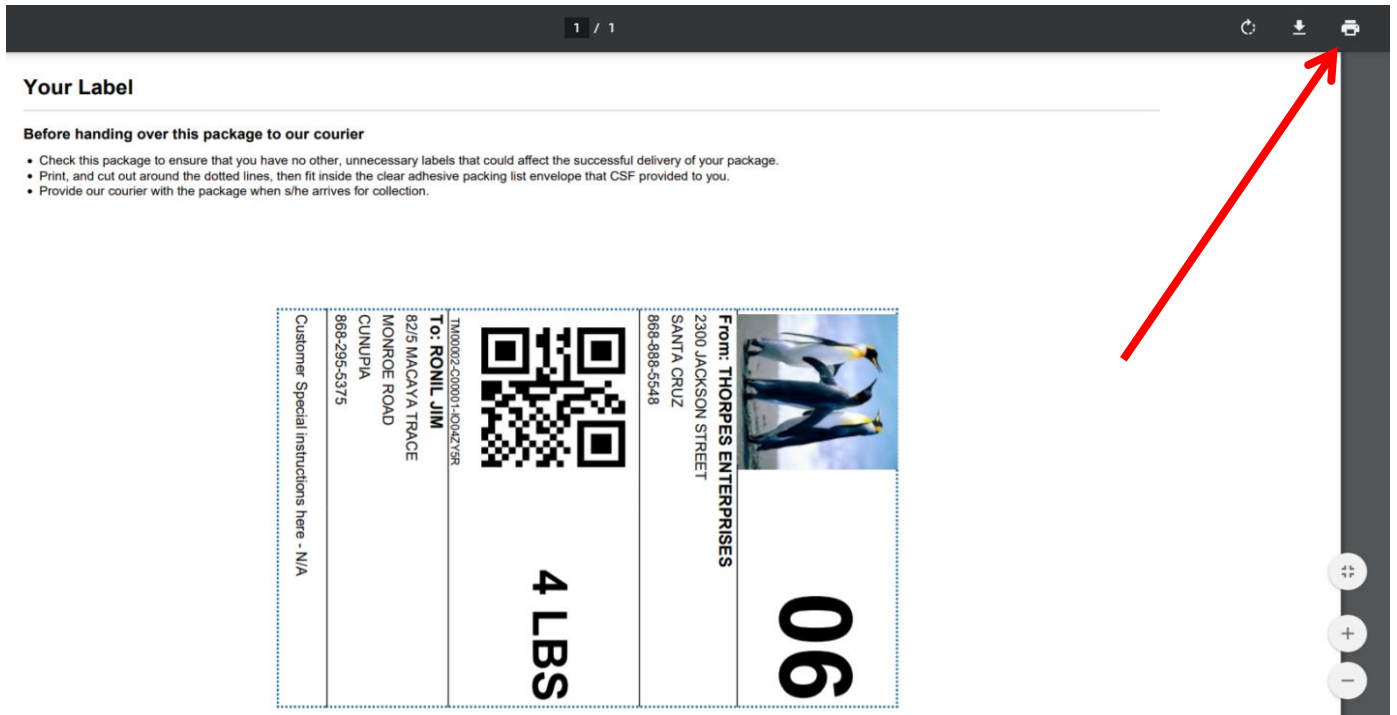

Fig 52

- **Once the correct printer is selected, click print to have label printed.**

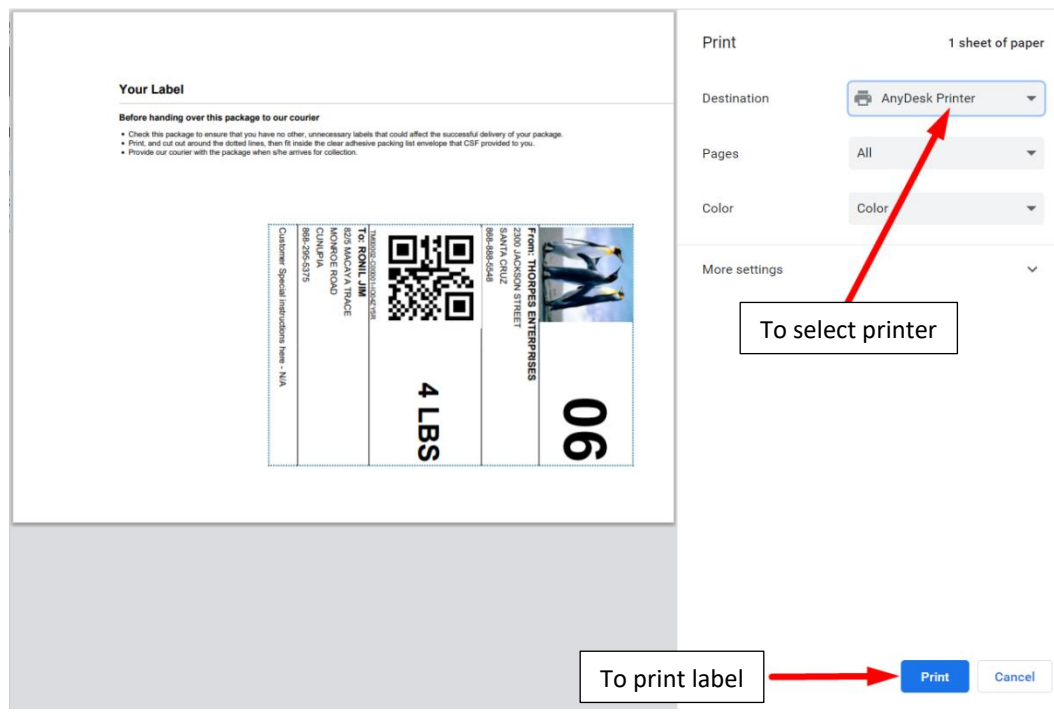To select printer

To print label

Fig 53

YOUR ORDERS

1. **Placed orders will now be shown under the "Orders" Section**
2. **All your orders will be displayed here. You can edit, print labels, or view log history, which all can be found under the "Action" column.**
3. **Orders can also be searched using the amount in TTD/USD or by order ID.**
4. **You can download the label again (if required) and edit or view logs.**
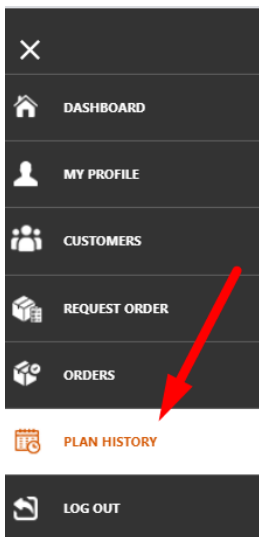
YOUR PLAN HISTORY

1. **This is the subscription transaction history log - it will show both "Active" and "Pending" subscriptions.**
2. **Active - meaning the Merchant(s) already paid for the subscription**
3. **Pending - meaning the Merchant(s) did not pay for the subscription and will make POD (Payment on Delivery)**
4. **The subscription count/reminder of subscriptions is displayed in the "Wallet" on the top right on the Merchant's Dashboard - (which is based on the amount of packages/orders they have available).**

Fig 54

Plan Name	Payment Type	Transaction ID	Per Package	Total Packages	Total Charges	Conversion Rate	Date	Status
10 OR MORE LABELS	Payment on Delivery	-	33.00 TTD	2	66.00 TTD	6.80	19-Sep-2020	PENDING
10 OR MORE LABELS	Payment on Delivery	-	33.00 TTD	10	330.00 TTD	6.80	22-Aug-2020	PENDING

Fig 55

Wallet Balance ❓ = 0.00 **TTD**

Wallet Balance = 0.00 **TTD**

Deliveries Balance = **5**

Total Purchased Deliveries = **12**

ADD MONEY TO WALLET

CLICK TO PURCHASE PLAN

VIEW PURCHASED PLAN HISTORY

Fig 56

IMPORTANT NOTES

1. **CSF will charge you a 5% fee if we must collect payment from your clients.**
   - **Example - Your Order is $300.00 (5% of $300 = $15)**

2. **When CSF transfers the funds collected from your clients, we will transfer to your Bank Account on a weekly basis - the 5% fee will be deducted.**

3. **Insurance is *optional* - if you want to insure an item(s) with CSF the following fees will be applied:**
   - **Standard Insurance - 1% - any item that is not on the fragile listing**
   - **Fragile Insurance - 10% rounded to the nearest 10th - based on CSF's fragile listing**

   If an item(s) is damaged while in transit to your clients by CSF, you will be refunded based on the value of the package/items you submitted.

4. **When you add clients to your account/dashboard - if the area is not on the listing provided - this will be sent as a "Pending Area Request" - We will ONLY contact the Merchants; the Merchants will be responsible for contacting their clients and providing an update to CSF.**

5. **When you submit your "Order Request", our Warehouse will receive the notification, at this time if a courier is in that specific location - he can pass for the pickup the order one time.**
   - **We will assign that package to the driver's device, once package(s) are collected from you, both you and your client will receive an e-mail.**
   - **The "Order" can be dropped off the same day - if the client is on the same route the courier must pass on his way to the Warehouse.**

IF Not

   - **The courier will return with the package(s) to the warehouse and it will be scanned in as a Merchant Pickup – you and your client will receive an e-mail (Received at CSF Warehouse).**
   - **When the package is assigned to your courier the following day, both you and your client will get an e-mail notification, another e-mail will be sent to both you and your client when the courier delivers the package to the client.**

6. **There are two (2) options for Merchants:**
   - **Deliver ONLY for a package fee.**
   - **Deliver and collect payment (a 5% fee will be charged based on the item(s) value) + package fee.**

7. **Delivery timeframe - 24 - 72 hours (Mondays - Fridays)**

8. **Package fees Breakdown – Deliveries**
   - **$25.00 for over 100**
   - **$27.00 for over 50**
   - **$30.00 for over 20**
   - **$33.00 for over 10**
   - **$38.00 for a single package (one off)**

9. **Your tracking numbers can be used on CSF Website to see the status of the client's package(s).**