Candisa Systems

Quick Start Guide
TCS-Online.net

TCS

Objective:

This document is intended for individuals and organizations that plan to evaluate the Tariff Classification System (TCS) application found at https://tcs-online.net.

We will cover the most basic information to get started and the minimum configuration items to consider. Every install is different and varies by team, we recommend this guide be used as a supplement to appropriate Information Technology personnel resources and TCS support.

Revisions:

1. 7/24/2023 - Initial Version - Luis Sayago

Support:

-   On our website at http://candisa.com
-   Via email at service@candisa.com

ℹ	Informational, tips and tricks, or shortcuts

⚠	Warnings, decision point, review

⛔	Stop, proceed with caution, not recommended

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System Requirements:

- Microsoft Windows based PC or Server *
  - MS Windows 7, 10, 2012, 2016, 2019 or greater (32 or 64 bit)
  - Any modern browser like Chrome, Firefox, or Edge
- Apple Mac OS based computer *
  - Mac OS 10.6 or greater (32-bit PowerPC or Intel 32/64 bit)
  - Any modern browser like Chrome, Firefox, or Safari
- Mobile devices (Android or iOS) running recent OS version (last 6 years) **
  - Relatively large screen size. For phones, the Pro or Max versions with larger screens are preferred.
  - Any modern browser like Chrome, Firefox, Edge, or Safari
- Internet connectivity ***
  - 200ms or less latency
  - Broadband quality speed, generally at least 5 Mbps down and 1 Mbps up

Notes:

* Since TCS is a Cloud based web application, any recent computer running a modern operating system and browser should work but we are unable to test all configurations and technical support can be limited if the minimun systems requirements are not met.

** Currently support for mobile devices is limited to devices with larger screens and we recommend using a desktop browser for the best experience. Smaller mobile screens will be supported for simple tasks like 'quick search' or comments.

*** The minimum internet connectivity requirements provide a good experience when navigating the app but tasks like uploading and downloading larger attachments can be time consuming unless a faster connection is provided.
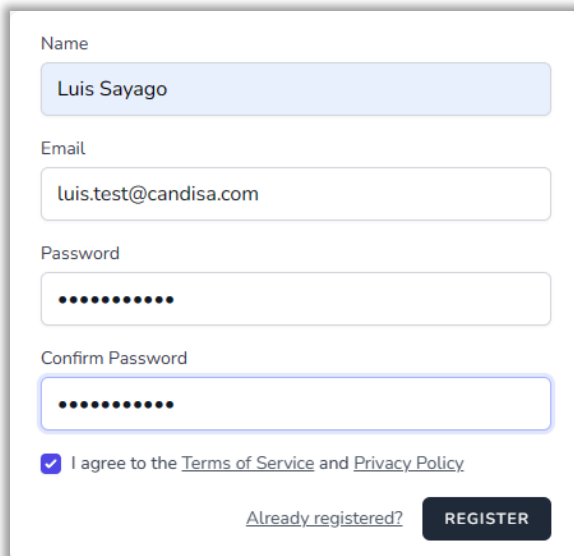
First User Registration:

This section will show new users how to register for an account so they can start using the app's functionality. Keep in mind that even for the free period of use, a valid email and credit card are required. You can cancel your subscription at any time before or after the 1st billing period.

1. From the app's welcome page, click on the 'REGISTER' link to get started.
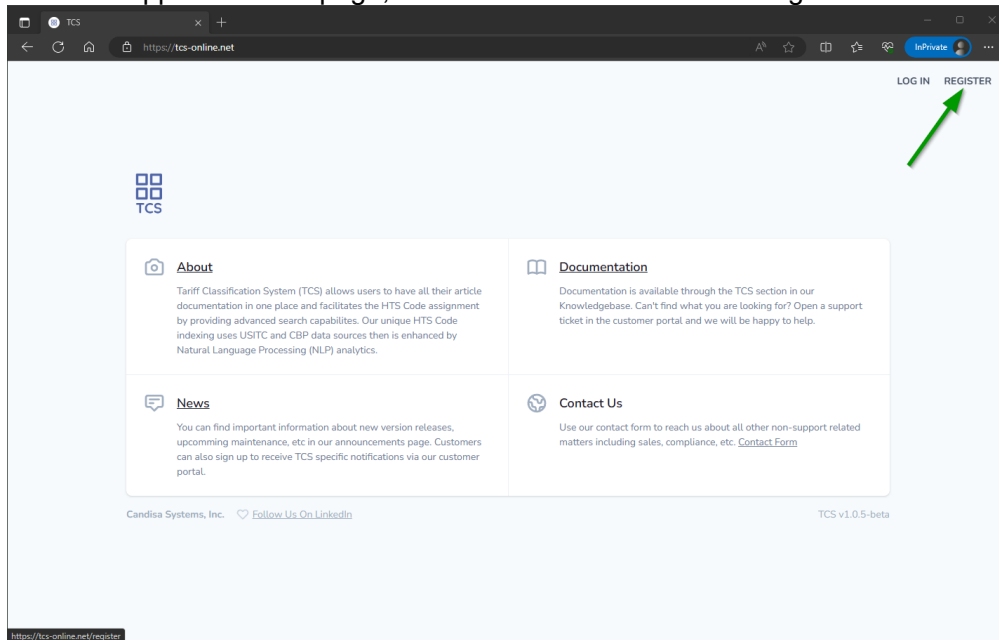
2. Fill out all the required information, review and agree to the Terms of Service and Privacy Policy, then click the 'REGISTER' button to proceed.

3. When the confirmation screen is shown, look for a verification email in your inbox. If you don't receive the verification email after a while, look for it on your Spam folder and if necessary, send a new verification email by clicking the resend verification button.

Thanks for signing up! Before getting started, could you verify your email address by clicking on the link we just emailed to you? If you didn't receive the email, we will gladly send you another.

**RESEND VERIFICATION EMAIL**   Log Out
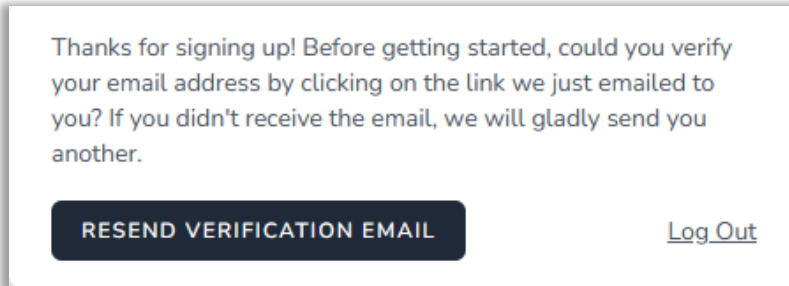
4. In your email inbox, open the verification email and click on the verify email address button or copy/paste the entire link below into your browser's navigation bar.

Hello!

Please click the button below to verify your email address.

Verify Email Address

If you did not create an account, no further action is required.

Regards,
TCS

If you're having trouble clicking the "Verify Email Address" button, copy and paste the URL below into your web browser: https://tcs-online.net/email/verify/6/4f10fc 4fa9ede824a16b3b1fd73430652d968968?expires=1690256127&signature=351a0 037ccc408c0ce515cf7af930ddab1c10615f3c967b87ebe0ad66b49b3c1

NOTE: If you perform the email verification step within a short period of time after completing the registration form, you should be taken directly to the app's dashboard. It is also possible that you will be asked to login again, if presented with a login screen enter the username and password you entered during registration, after login you will be taken to the app's dashboard.
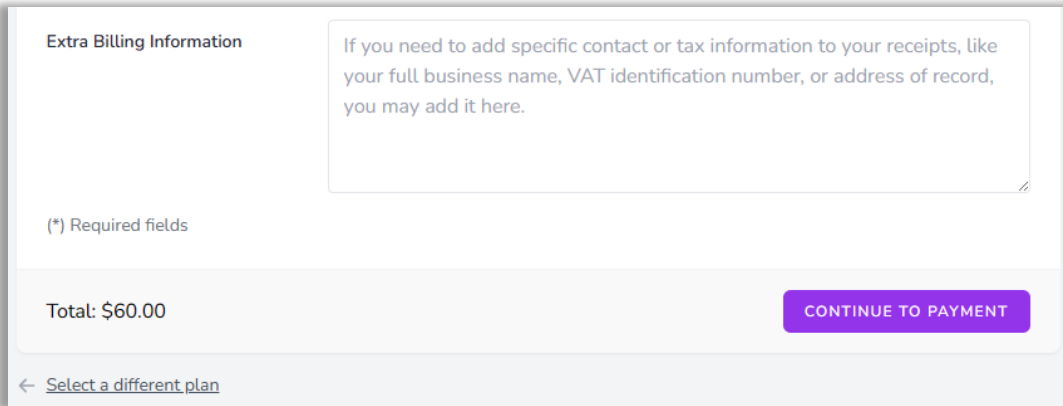
5. When you first register, a team is created for you, but it will have no active subscription linked to it. Before using the app's full functionality, you will need to navigate to the billing screen, either by clicking on the red text or via the drop down menu on the top right.
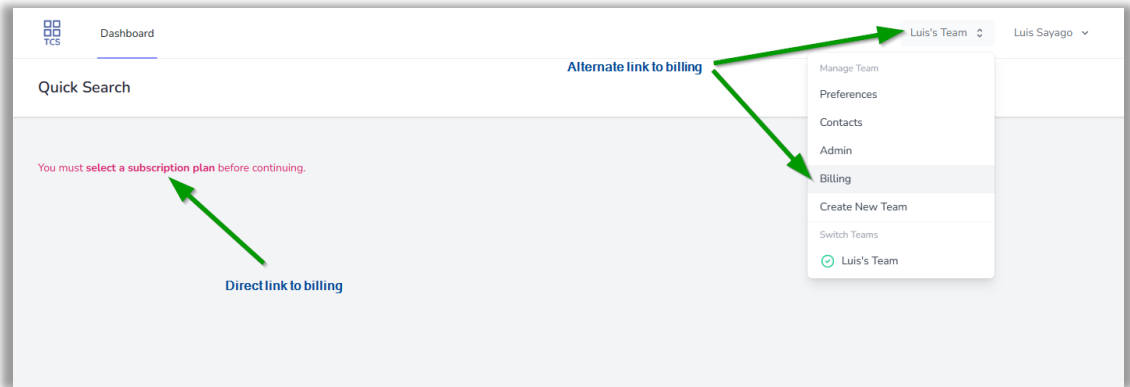
6. From the billing screen, you can select the plan and terms that are best suited to your needs. Take advantage of any free trials and discounts by reading the subscription details carefully. You can change or cancel your subscription at any time, but please consider partial or full charges could still be incurred after the trial period under certain situations like downgrading from a yearly plan.
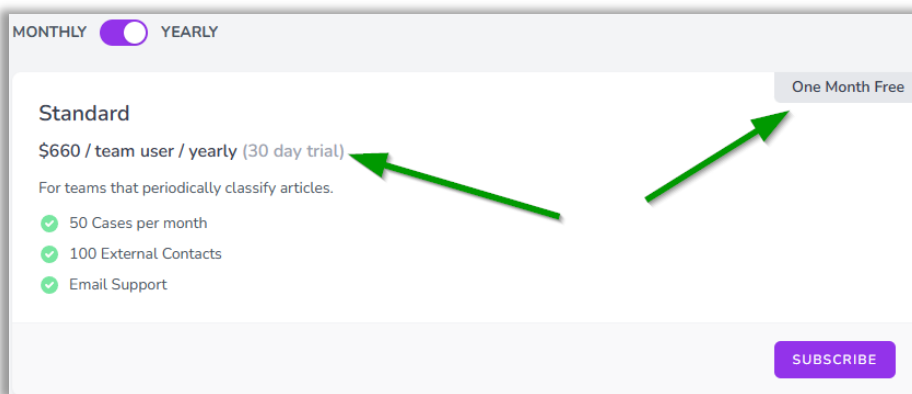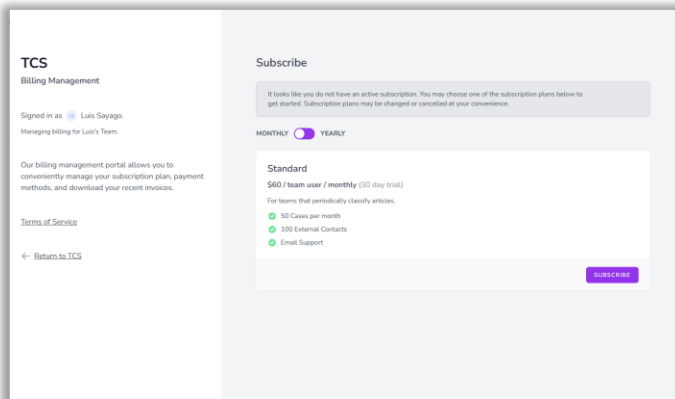
7. After selecting a subscription and clicking 'SUBSCRIBE', you will get a chance to enter some account information and review your next payment amount. Click the 'CONTINUE TO PAYMENT' button to proceed. you will be taken to the payment processor's page for entering all your payment information.
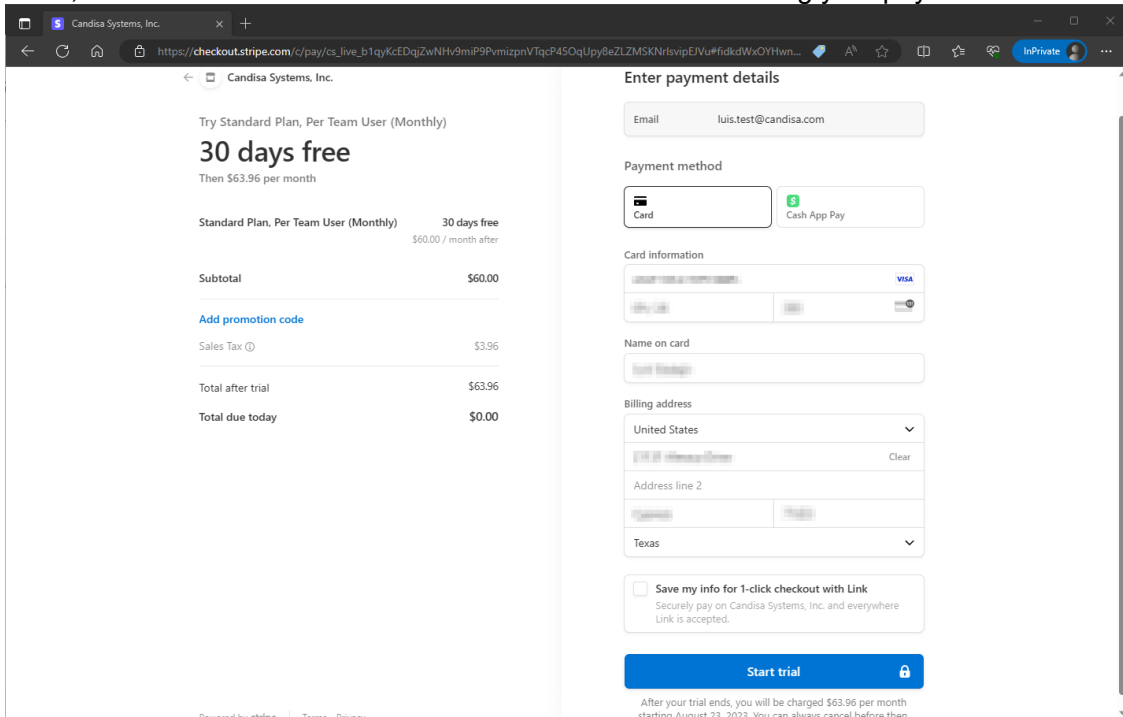
8. After the account information is entered you will be taken to the payment processor's page to enter your payment information. Take advantage of any options offered, enter any required fields, and take a moment to do one last review before submitting your payment.

9. After the payment process is completed, you will be taken back to the app's billing screen. Here you can review and make any changes to your subscription if needed. If everything looks good, you can go back to the app's dashboard by clicking the 'Return to TCS' link.
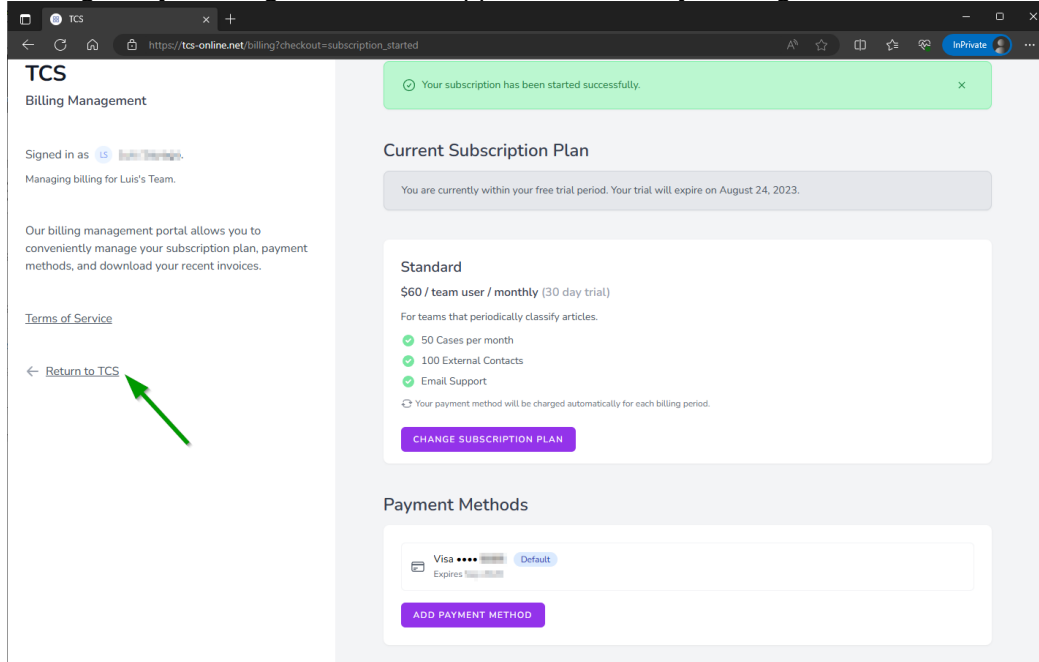
10. Now that an active subscription is linked to your Team, access to all the features like 'quick search' and ability to create cases is available. Please refer to additional support documentation for additional details in the usage of these features.
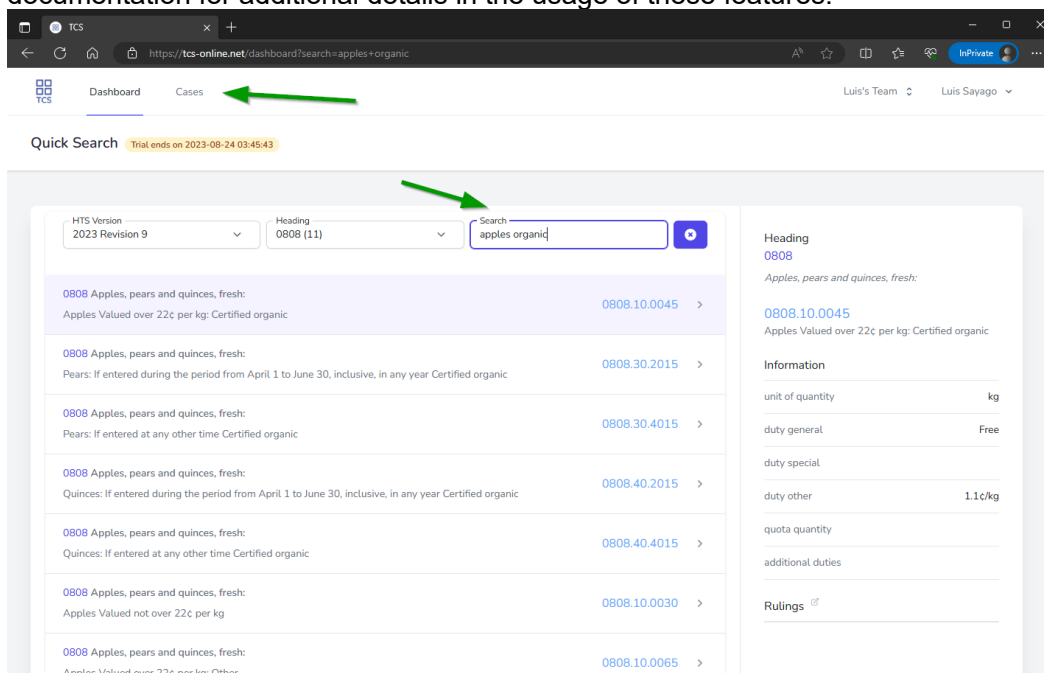
About Teams:

When the user registers for the first time, a personal team is created for them, but everyone can create additional teams as needed. Teams allow users and organizations to manage access to cases, external contacts, preferences, categories, templates, and subscription billing.

One of the most important aspects handled by Teams, are subscriptions since an individual user can have multiple teams each with its own subscription. For example, a user is a customs broker and handles different customers in the app. For customer ABC, who gives them a lot of business, a larger team of 5 needs to be assigned to cover the workload. The customs broker can create a Team for customer ABC and assign all 5 users to that team, which means they will be charged $x5 for that Team. Additionally, the customs broker has a smaller customer XYZ that only needs 2 users to cover the case workload, so a separate Team is created for them while only being charged $x2.

Table illustrating the scenario above:

Users	Team ABC ($60/mo/user)	Team XYZ ($60/mo/user)
User1	YES	YES
User2	YES	YES
User3	YES	NO
User4	YES	NO
User5	YES	NO
	$60x5 = $300 per month	$60x2 = $120 per month