

Saving Addresses and Contacts

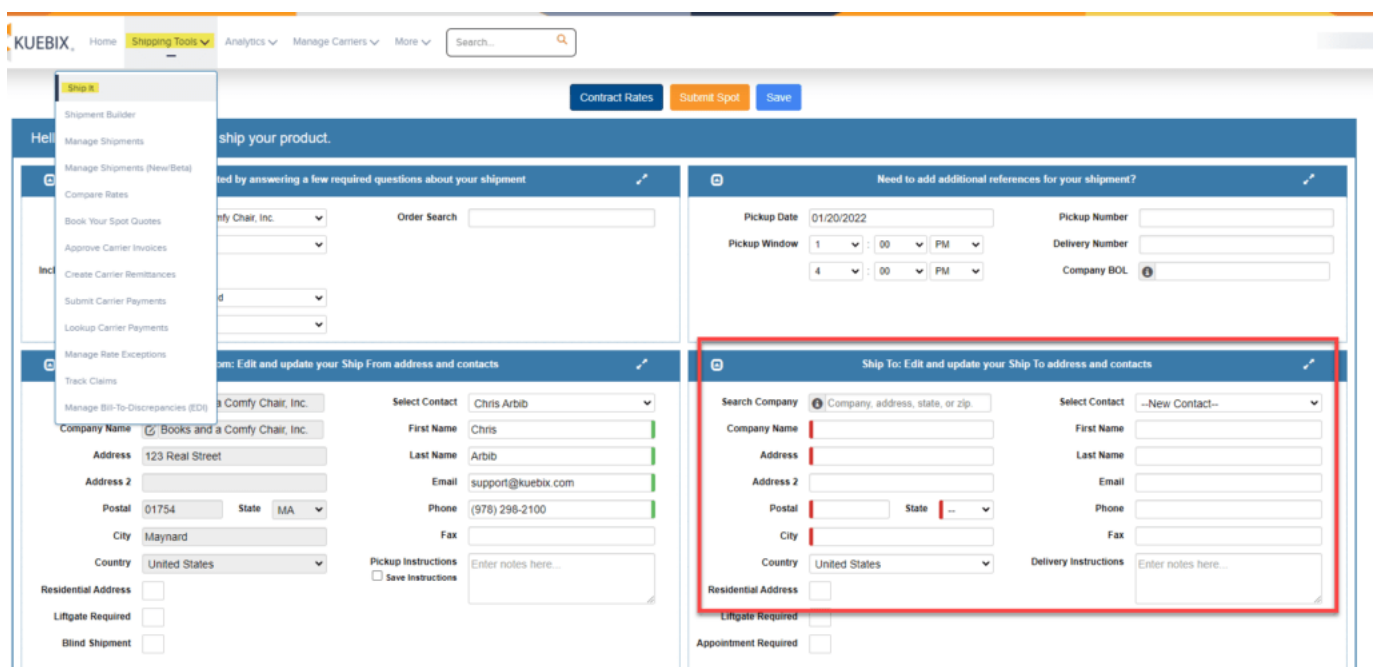
Saving a commonly used address helps make shipping easier and can be saved using one of the following methods.

Available options 

- Using Ship It
- Using Data Upload Tool

Using Ship It

When creating a shipment in Ship It, using the Search Company field will bring up previously saved address and contact information.



The screenshot displays the KUEBIX 'Ship It' interface. The top navigation bar includes 'Home', 'Shipping Tools', 'Analytics', 'Manage Carriers', and a search bar. The left sidebar lists various shipping management tasks. The main content area is divided into two panels. The left panel, titled 'Ship your product', contains a 'Ship To' form with fields for 'Company Name', 'Address', 'Postal', 'City', 'Country', 'First Name', 'Last Name', 'Email', 'Phone', and 'Fax'. The right panel, titled 'Need to add additional references for your shipment?', contains fields for 'Pickup Date', 'Pickup Window', 'Pickup Number', 'Delivery Number', and 'Company BOL'. A red box highlights the 'Ship To' form, specifically the 'Search Company' field and the 'Save' button.

Enter the company details in the appropriate fields. To save a phone number, a first and last name are required, though these can be "Shipping Contact" if a person is not known.

Once the information is entered, an option to save the Address (and Contact if applicable) is available.


If a contact has been provided, the option to make the contact the default one associated with the address is auto-selected. If you do not want the contact to be the default, uncheck the box. Once saved, they will be available in the Select Contact drop down menu.

The screenshot shows a web form titled "Ship To: Edit and update your Ship To address and contacts". The form is divided into two main sections: address and contact information. The address section includes fields for Company Name, Address, Address 2, Postal, State, City, and Country. The contact section includes fields for First Name, Last Name, Email, Phone, and Fax. There are also checkboxes for Residential Address, Liftgate Required, and Appointment Required. A "Delivery Instructions" text area is located below the contact fields. At the bottom, there are three buttons: "Clear Address", "Save Address & Contact", and "Default Contact". The "Default Contact" button is highlighted with a red box.


Ship To: Edit and update your Ship To address and contacts	
Search Company	<input type="text" value="The Mended Drum"/>
Company Name	<input type="text" value="The Mended Drum"/>
Address	<input type="text" value="54 Filigree Street"/>
Address 2	<input type="text"/>
Postal	<input type="text" value="02132"/>
State	<input type="text" value="MA"/>
City	<input type="text" value="Boston"/>
Country	<input type="text" value="United States"/>
Residential Address	<input type="checkbox"/>
Liftgate Required	<input type="checkbox"/>
Appointment Required	<input type="checkbox"/>
Select Contact	<input type="text" value="--New Contact--"/>
First Name	<input type="text" value="Shipping"/>
Last Name	<input type="text" value="Contact"/>
Email	<input type="text"/>
Phone	<input type="text" value="(555) 748-2778"/>
Fax	<input type="text"/>
Delivery Instructions	<input type="text" value="Enter notes here..."/>
<input type="button" value="Clear Address"/> <input type="button" value="Save Address & Contact"/> <input checked="" type="checkbox"/> Default Contact	

The same steps can be repeated if you'd like to add more than one contact, which then become available in the **Select Contact** drop down menu.

The next time you create a shipment, type the company name into the **Search Company** field to bring up the information as either a Ship To or Ship From option.

 **Ship To: Edit and update your S**

Search Company



The Me

Company Name

The Mended Drum

54 Filigree Street

Boston, MA 02132

Address

Address 2

Postal

State

--

▼

City

Boston

▼


Country

United States


▼

Updating the saved information works similarly and allows you to easily make adjustments.

Enter the company name in the **Search Company** field, and then update the appropriate information. Enter the Postal to have the City and State auto-fill. Once you type, the option to **Update Address** appears.

 Ship To: Edit and update your S

Search Company

 The Mended Drum

Company Name

The Mended Drum

Address

1948 Filigree Street

Address 2

Postal

02132

State

MA

City

Boston

Country

United States

Residential Address


☐


Liftgate Required

☐

Appointment Required

☐

 [Clear Address](#)

 [Update Address](#)

The same applies for updating contact information.

Select Contact

Shipping Contact

First Name

Shipping

Last Name

Contact

Email

Phone

(888) 748-2778

Fax

Delivery Instructions

☐ Save Instructions


Enter notes here...

☒ Default Contact

 Update Contact

Please reach out to support at support@kuebix.com if you would like to remove an address or contact, or if you would like to bulk upload multiple addresses and/or contacts.

Once a contact/address has been saved, it can be edited by either updating the information in Ship It, or by using the Universal Search field at the top of the screen and editing the information on the Account page itself.



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Test Business for Testing

Search Results

All

Account Warehouses

Accounts

Accounts

1 Result

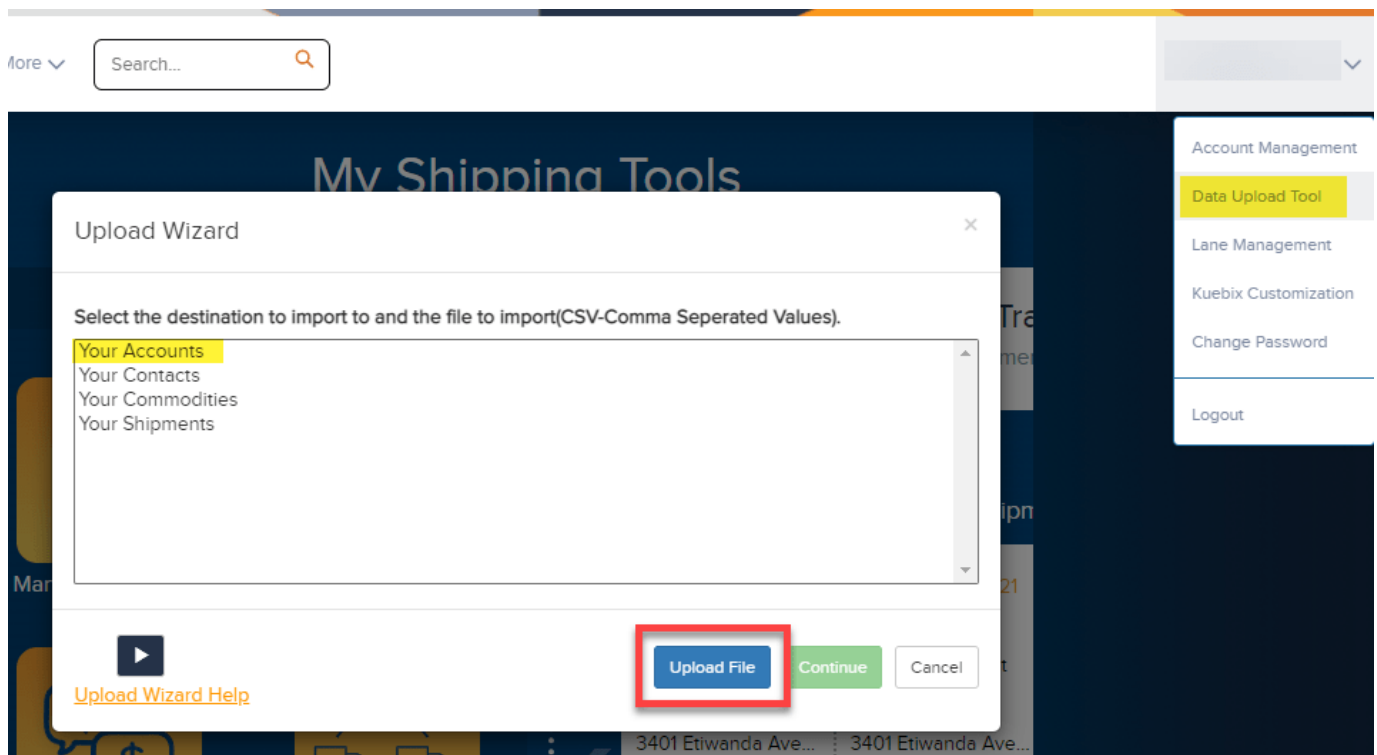
ACCOUNT NAME	PARENT ACCOUNT	ACCOUNT SITE	KUEBIX COMMUNITY CARRIER
Test Business for Testing			<input type="checkbox"/>

Using Data Upload Tool

If you have multiple addresses to save, the Data Loader is recommended.

From your login info in the upper right corner, click **Data Upload Tool**, select the type of information you're uploading, and then click **Upload File**.

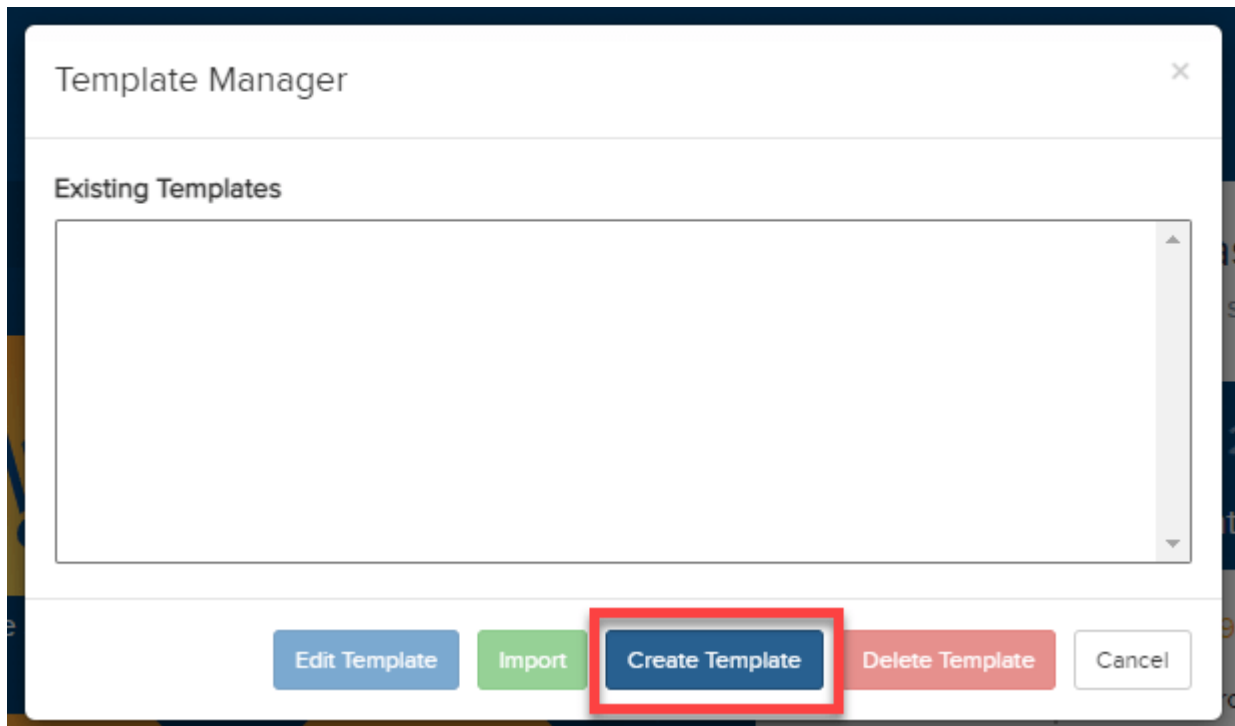
To upload contacts, you will need to upload Accounts first, so the contacts can be associated with the correct accounts.



The data file will need to be a .csv

Navigate to where you have the .csv saved, and select the file.

On the Template Manager pop-up, select **Create Template**.



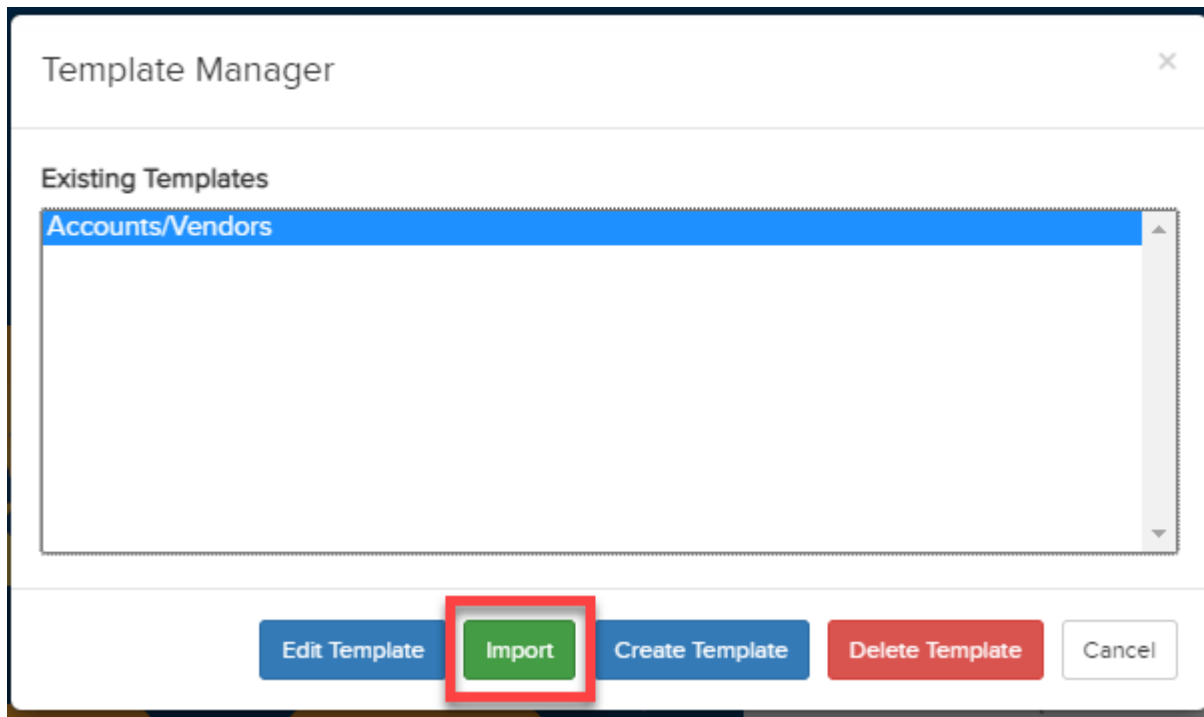
After naming your template, click **Auto Map Fields**.

We recommend using the templates attached at the bottom of this article, which have the correct fields and sample data included.

If you prefer to use your own template, you will need to manually map the fields.

After mapping the fields, click **Save Template**.

Select the template just created, and then click **Import**.



Once the upload finishes, the account information will be available in Ship It.

Please reach out to support at support@kuebix.com with any questions or issues.