


Saving Addresses and Contacts

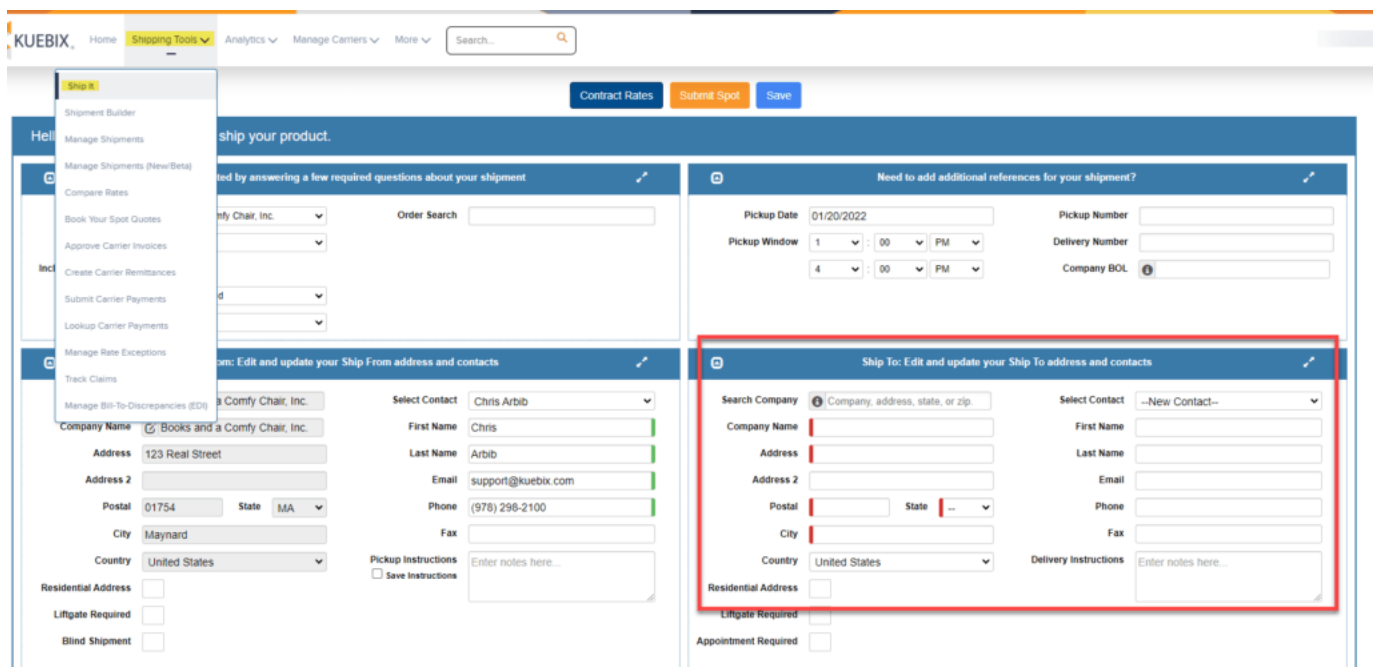
Saving a commonly used address helps make shipping easier and can be saved using one of the following methods.

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 web application interface for creating a shipment. The main form is titled "Ship your product" and is divided into several sections. A red box highlights the "Ship To: Edit and update your Ship To address and contacts" section, which includes a "Search Company" field with a magnifying glass icon, a "Select Contact" dropdown menu, and input fields for "Company Name", "Address", "Address 2", "Postal", "City", "Country", "First Name", "Last Name", "Email", "Phone", "Fax", and "Delivery Instructions". The "Search Company" field is currently empty, and the "Select Contact" dropdown is set to "--New Contact--".

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 "Search Company" (The Mended Drum), "Company Name" (The Mended Drum), "Address" (54 Filigree Street), "Address 2", "Postal" (02132), "State" (MA), "City" (Boston), and "Country" (United States). There are also checkboxes for "Residential Address", "Liftgate Required", and "Appointment Required". The contact section includes a "Select Contact" dropdown menu (set to "--New Contact--"), "First Name" (Shipping), "Last Name" (Contact), "Email", "Phone" ((555) 748-2778), and "Fax". A "Delivery Instructions" text area is also present. At the bottom, there are three buttons: "Clear Address", "Save Address & Contact" (highlighted in yellow), and "Default Contact" (highlighted with a red box and checked).

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

Company Name
Address

Address 2

Postal
State

City

Country

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

Company Name

Address

Address 2

Postal State

City

Country

Residential Address

Liftgate Required

Appointment Required

[Clear Address](#)

[Update Address](#)

The same applies for updating contact information.

Select Contact

First Name

Last Name

Email

Phone

Fax

Delivery Instructions

Save Instructions

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.

The screenshot shows the Kuebix Freightwise interface. At the top, there is a navigation bar with links for Home, Shipping Tools, Analytics, Manage Carriers, and More. A search bar on the right contains the text "Test Business for Testing". Below the navigation bar, the "Search Results" section is active, displaying "Accounts" with "1 Result". A table below lists the search results with columns for ACCOUNT NAME, PARENT ACCOUNT, ACCOUNT SITE, and KUEBIX COMMUNITY CARRIER. The first row shows "Test Business for Testing" in the ACCOUNT NAME column, which is highlighted with a red box. The KUEBIX COMMUNITY CARRIER column for this entry contains an unchecked checkbox.

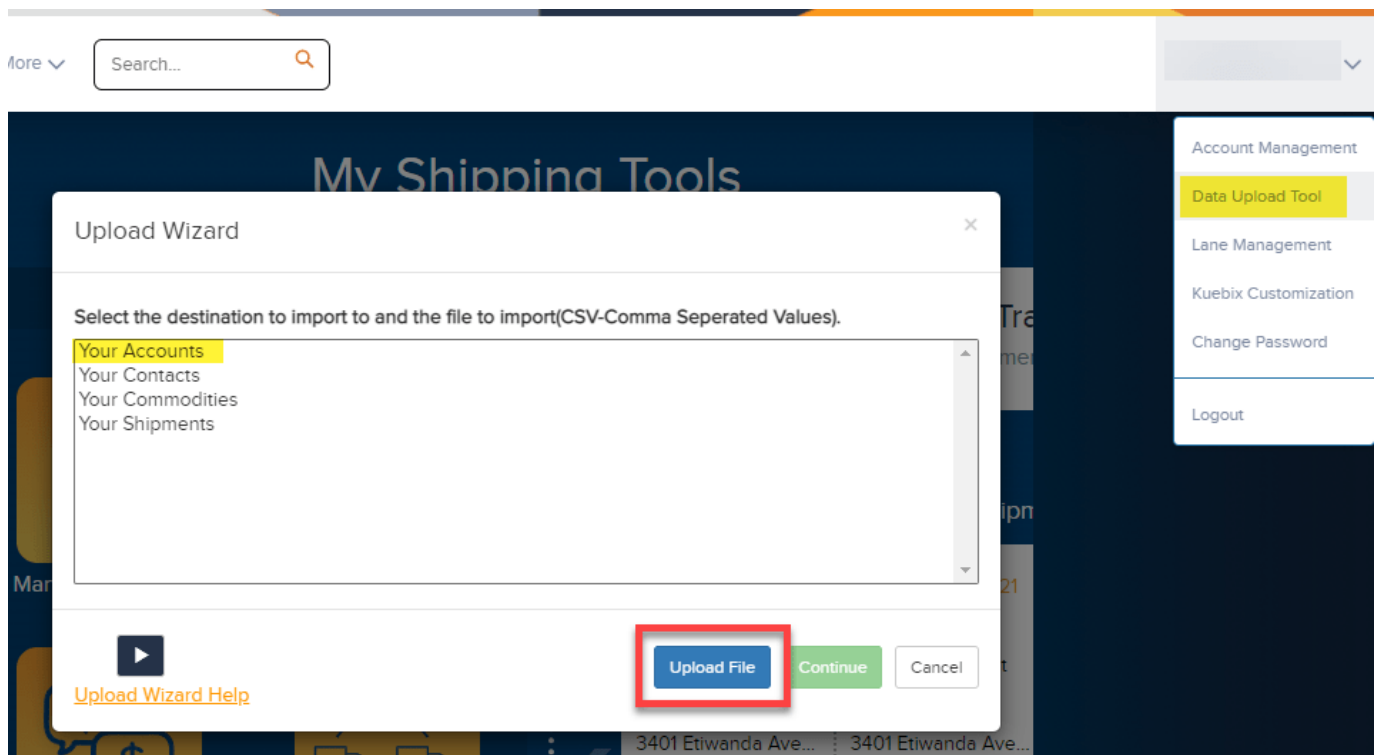
ACCOUNT NAME	PARENT ACCOUNT	ACCOUNT SITE	KUEBIX COMMUNITY CARRIER
Test Business for Testing			<input type="checkbox"/>

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**.

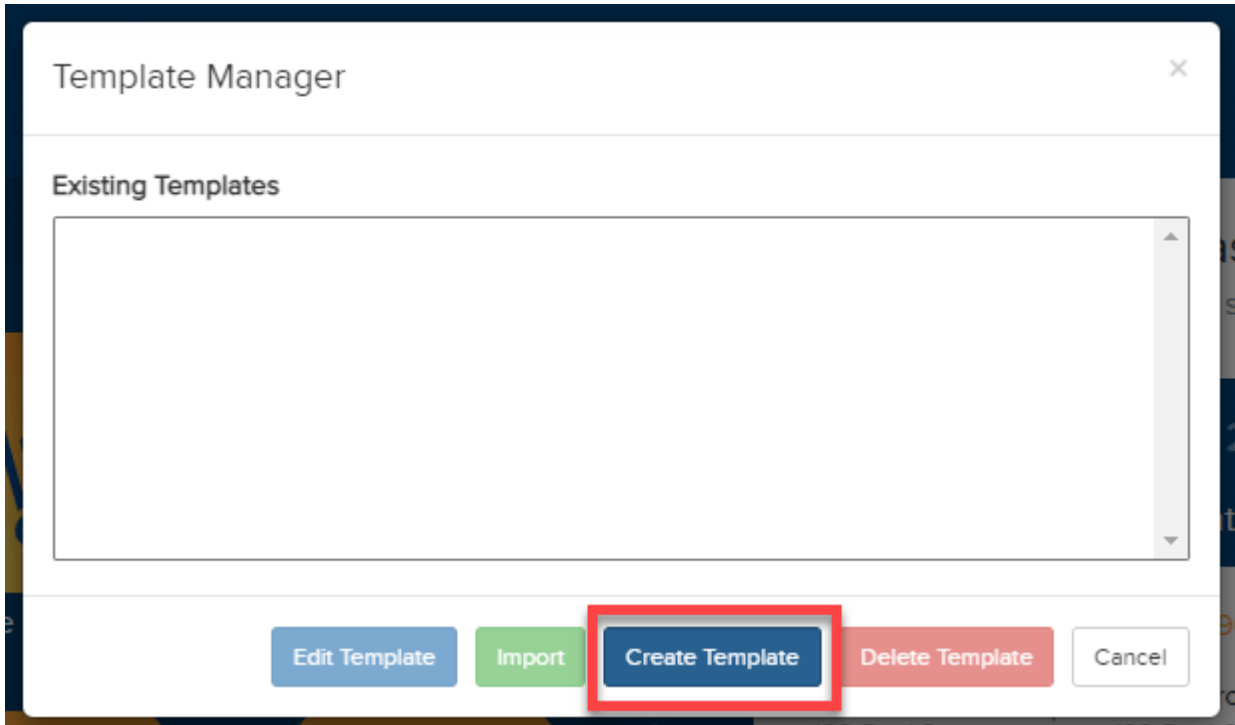
To upload contacts, you will need to upload Accounts first, so the contacts can be associated with the correct accounts.



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**.



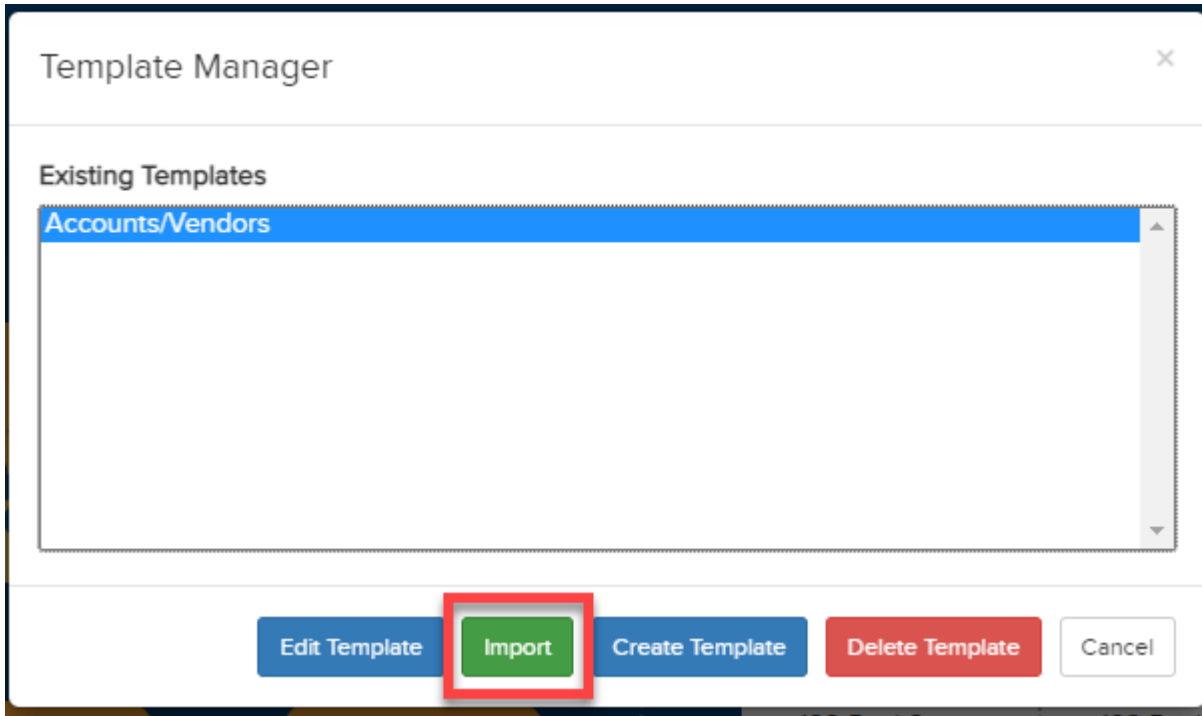
After naming your template, click **Auto Map Fields**.

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.