

Saving Addresses and Contacts

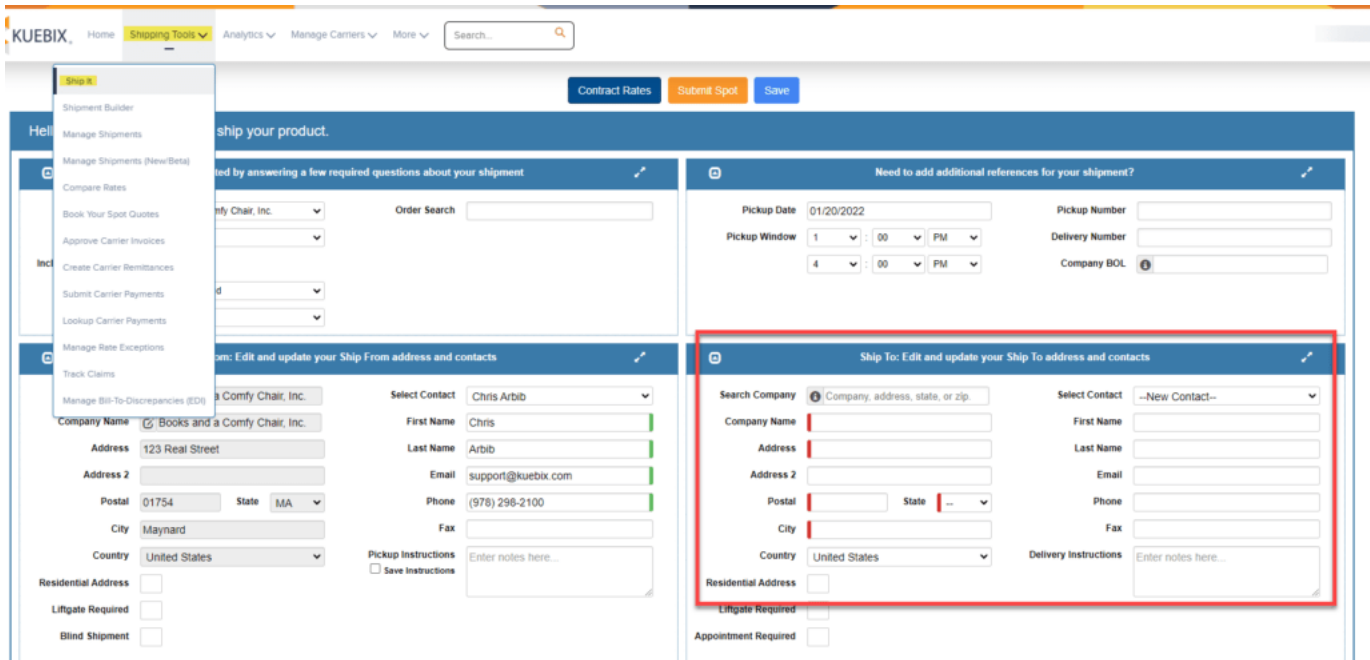
Saving a commonly used address helps make shipping easier and can be saved using one of the following methods.

Available options 

- Using Ship It
- Using Supplier/Customer Mgmt
- 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.



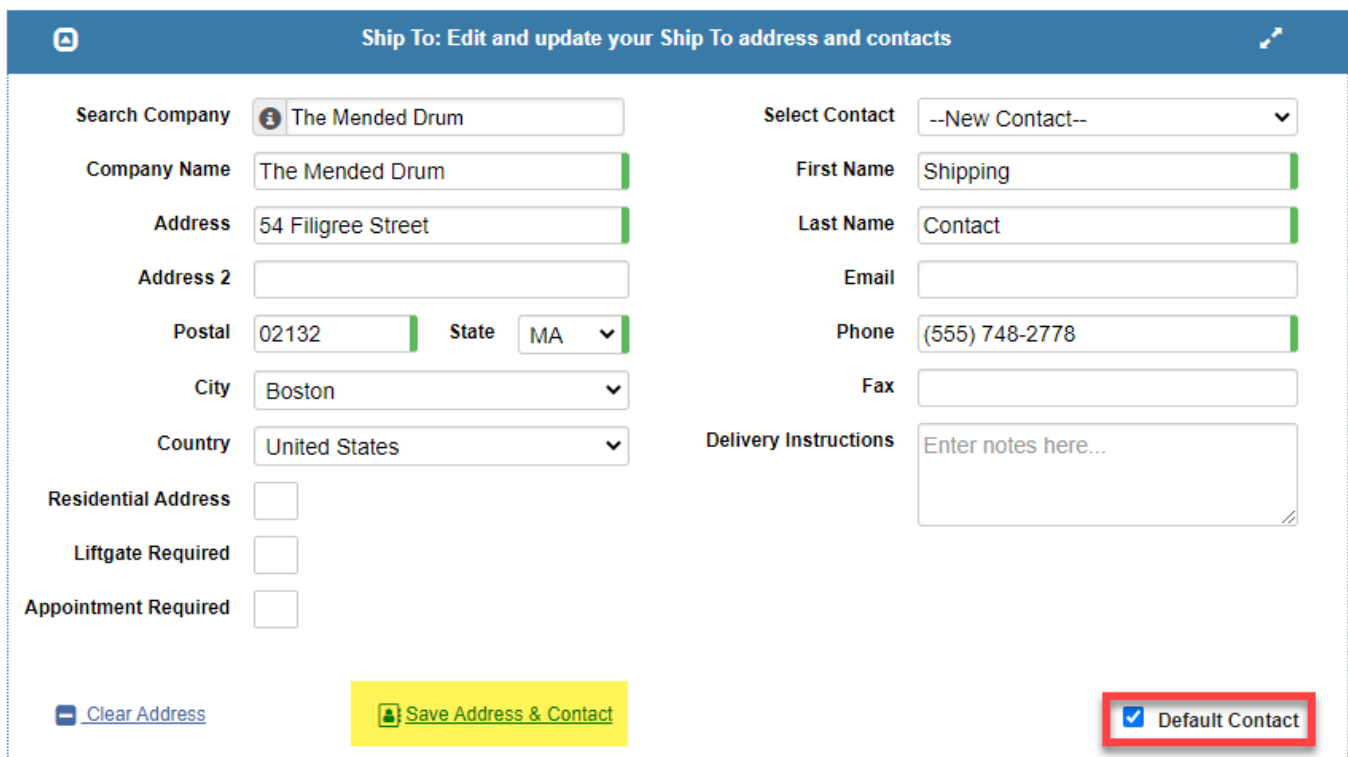
The screenshot displays the KUEBIX 'Ship It' interface. The top navigation bar includes 'Home', 'Shipping Tools', 'Analytics', 'Manage Carriers', and 'More', along with a search bar. A sidebar on the left lists various shipping management options. The main content area is divided into several sections:

- Ship your product:** Includes fields for 'Company Name' (Books and a Comfy Chair, Inc.), 'Order Search', 'Pickup Date' (01/20/2022), 'Pickup Window' (1:00 PM to 4:00 PM), 'Pickup Number', 'Delivery Number', and 'Company BOL'.
- Ship From: Edit and update your Ship From address and contacts:** Includes fields for 'Company Name', 'Address' (123 Real Street), 'Address 2', 'Postal' (01754), 'State' (MA), 'City' (Maynard), 'Country' (United States), 'Select Contact' (Chris Arbib), 'First Name' (Chris), 'Last Name' (Arbib), 'Email' (support@kuebix.com), 'Phone' ((978) 298-2100), 'Fax', and 'Pickup Instructions'.
- Ship To: Edit and update your Ship To address and contacts:** This section is highlighted with a red box and contains fields for 'Search Company' (with a magnifying glass icon), 'Company Name', 'Address', 'Address 2', 'Postal', 'State', 'City', 'Country' (United States), 'Select Contact' (New Contact--), 'First Name', 'Last Name', 'Email', 'Phone', 'Fax', and 'Delivery Instructions'.

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.



Ship To: Edit and update your Ship To address and contacts

Search Company

Company Name

Address

Address 2

Postal State

City

Country

Residential Address

Liftgate Required

Appointment Required

Select Contact

First Name

Last Name

Email

Phone

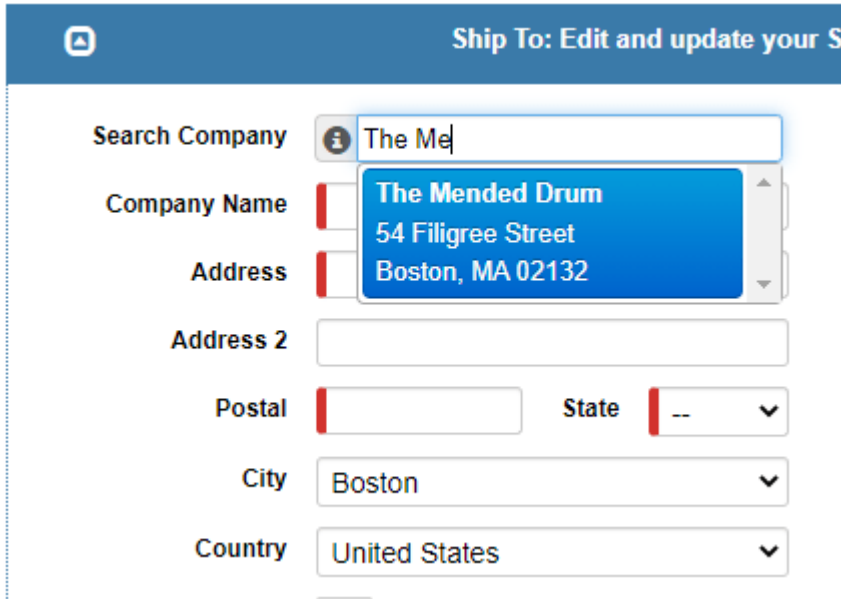
Fax

Delivery Instructions

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

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. 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

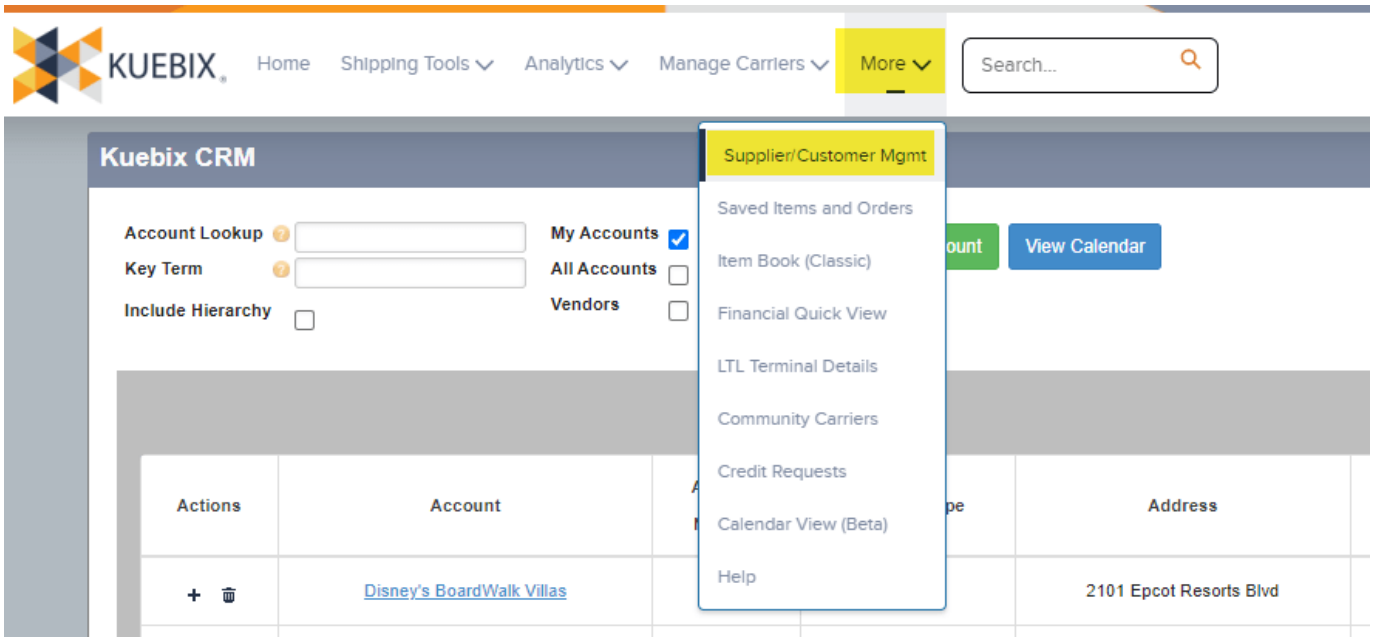
Default Contact

 [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.

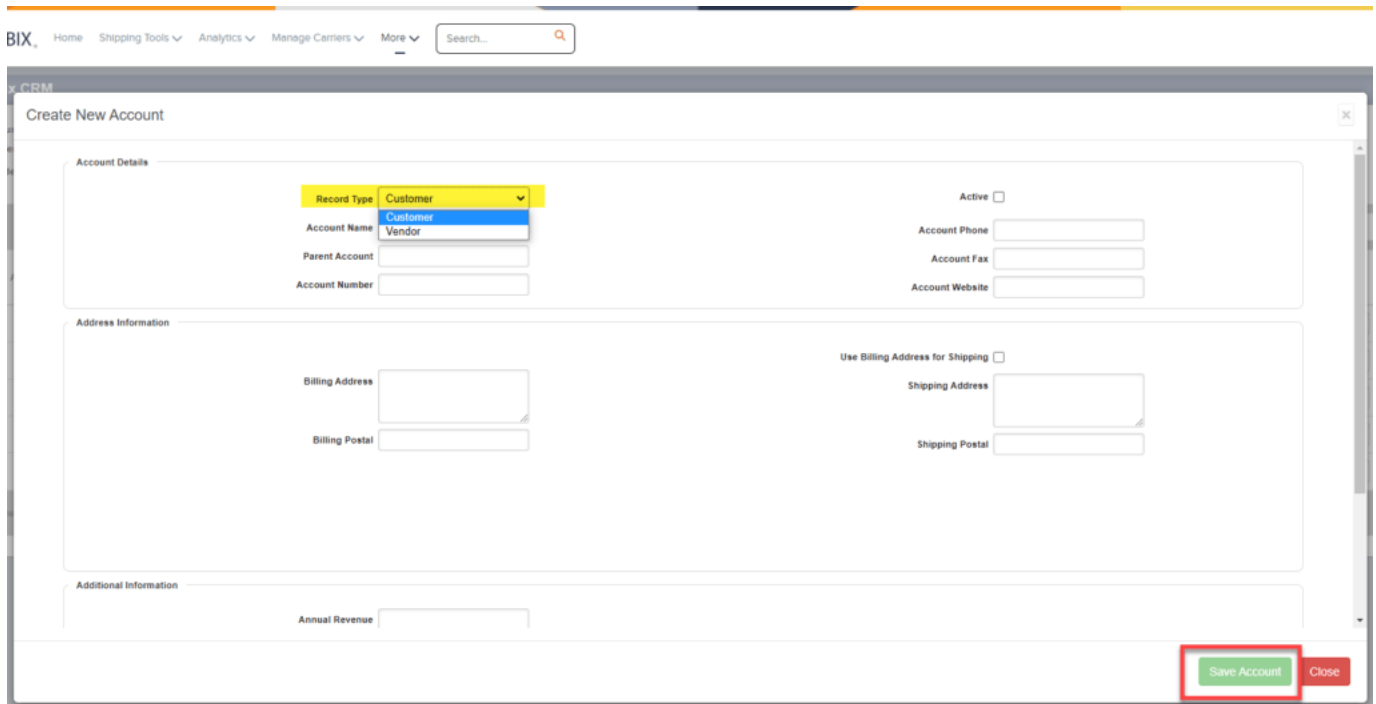
Using Supplier/Customer Mgmt

Information can also be saved using Supplier/Customer Mgmt, accessible via the **More** menu along the top of the screen.



The screenshot shows the Kuebix CRM interface. At the top, there is a navigation bar with the Kuebix logo, 'Home', 'Shipping Tools', 'Analytics', 'Manage Carriers', and a 'More' dropdown menu. A search bar is located on the right. Below the navigation bar, the 'Kuebix CRM' header is visible. On the left, there are input fields for 'Account Lookup', 'Key Term', and 'Include Hierarchy'. In the center, there are checkboxes for 'My Accounts', 'All Accounts', and 'Vendors'. A dropdown menu is open, showing options: 'Supplier/Customer Mgmt', 'Saved Items and Orders', 'Item Book (Classic)', 'Financial Quick View', 'LTL Terminal Details', 'Community Carriers', 'Credit Requests', 'Calendar View (Beta)', and 'Help'. Below the dropdown, a table lists account information. The first row shows an account named 'Disney's BoardWalk Villas' with an address of '2101 Epcot Resorts Blvd'. A 'View Calendar' button is visible next to the account name.

Select which type of record you want to create and then enter all relevant information. Once the information is entered, click **Save Account**.



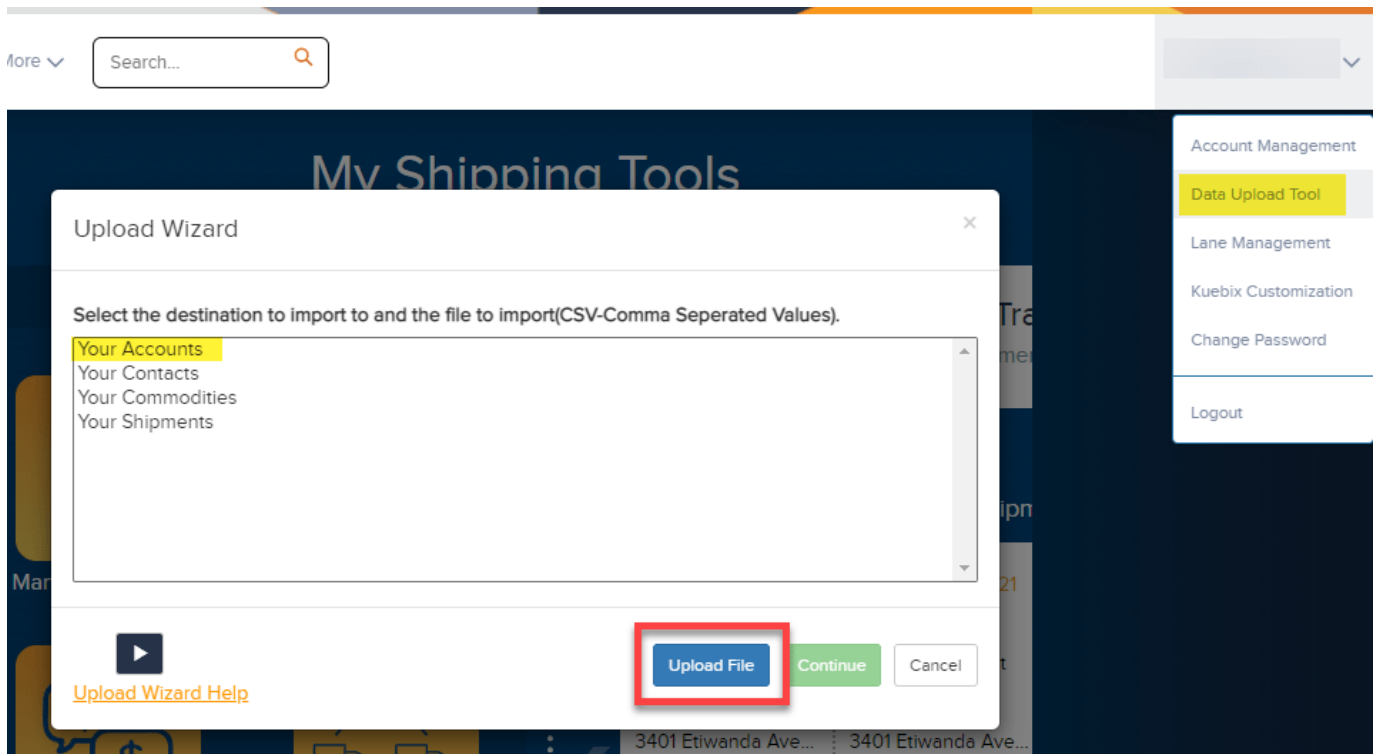
The screenshot shows the 'Create New Account' form in the Kuebix CRM. The form is divided into several sections: 'Account Details', 'Address Information', and 'Additional Information'. In the 'Account Details' section, the 'Record Type' dropdown is set to 'Customer'. Below it, there are input fields for 'Account Name', 'Parent Account', and 'Account Number'. To the right, there are checkboxes for 'Active' and input fields for 'Account Phone', 'Account Fax', and 'Account Website'. The 'Address Information' section contains input fields for 'Billing Address', 'Billing Postal', 'Shipping Address', and 'Shipping Postal', along with a checkbox for 'Use Billing Address for Shipping'. The 'Additional Information' section has an input field for 'Annual Revenue'. At the bottom right of the form, there are two buttons: 'Save Account' (highlighted with a red box) and 'Close'.

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**.

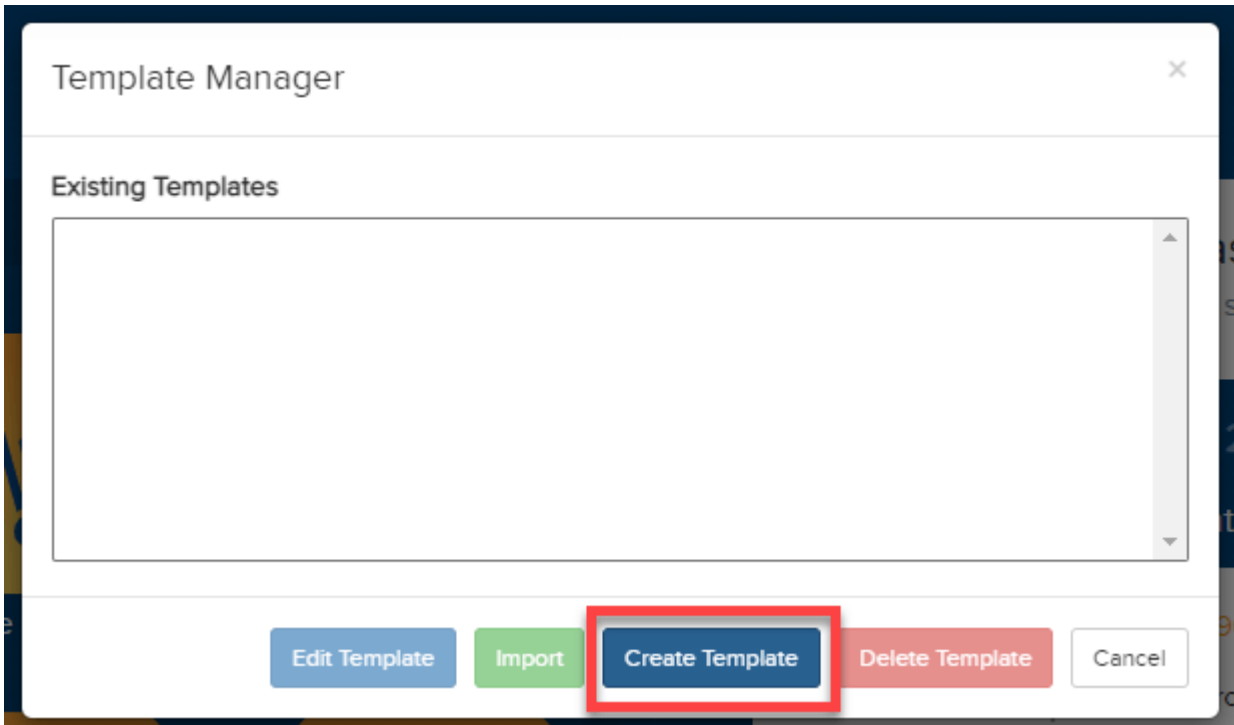
To upload contacts, you will need to upload Accounts first, so the contacts can be associated with the correct accounts.



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**.



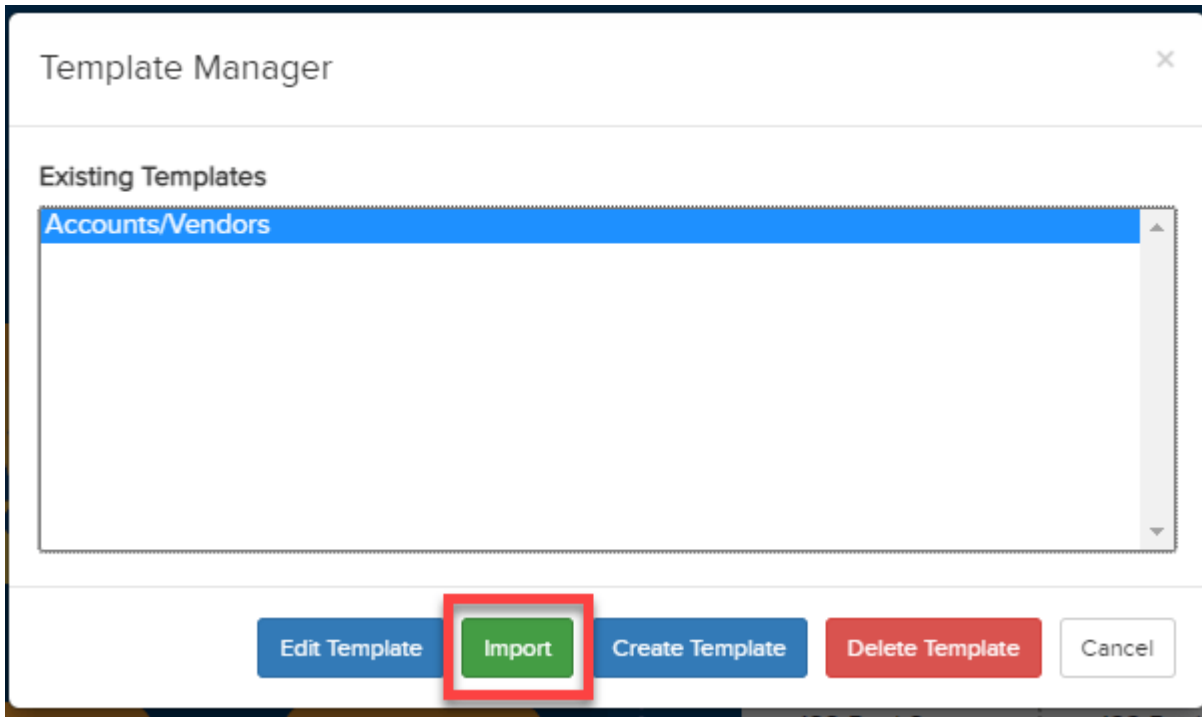
After naming your template, click **Auto Map Fields**.

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.