

Managing your address book

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Managing your address book

Managing your address book manually

New Zealand Post

Home | My Profile | Logout

Address Book

Enter address details, contacts and order defaults for your most frequently used collection and delivery addresses.

Use the [import facility](#) to quickly set up a complete address book from a .CSV file saved from Microsoft Excel.

Public Address Book
Entries from the public address book are marked with an asterisk (*)

powered by **redespatch**

Search Criteria

Results Per Page: 10

Search Filter: Name | No Filter

Address Book: Public and Private Address Books

Sort By: Company Name

update search

Displaying results 1 to 6 of 6

Code	Company Name	Town	Post Code	edit	delete
sdfg3	* Company	Town	6004	edit	delete
sdfg4	* Company	Town	6004	edit	delete
sdfg5	* Company	Town	6004	edit	delete
sdfg1	* Company	Town	6004	edit	delete
sdfg2	* Company	Town	6004	edit	delete
sdfg	* Company	Town	6004	edit	delete

previous next

Address Details

Address Book: Public

Address Code: []

Company Name: []

Building: []

Street Address: []

Address Line 2: []

Town: []

County: []

Postal Code: []

Country: United Kingdom

Area / Region: All Areas

VAT Number: [] (XX99999999)

Default Settings

Cost Centre: [] Use as Default

Service: Please Select Use as Default

Weight: 0 Use as Default

Pieces: 0 Use as Default

Insurance Value: 0 Use as Default

Goods Type: [] Use as Default

Notes: [] Use as Default

submit back to address book

Diagram 1

- 1 Search criteria** Use these options and filters to search your address book for a specific entry.
- 2 Add to your address book** Click here to manually add content to your address book.
- 3 Results list** The results of your search.
- 4 Import contacts** Click here to upload an address list from a .csv file (see below for further details).
- 5 Address book** The ‘Public’ setting is a common address book available to share with all Users within an organisation. The ‘Private’ setting limits viewing to the specific User.
- 6 Address details** Enter contact details into the appropriate fields.
- 7 Default settings** Here you can enter any default settings for specific contacts in your address book. RedClick will default to these details on consignment notes each time the contact is used.

Uploading your contacts into RedClick

The screenshot shows the RedClick 'Address Book' interface. At the top right is the 'New Zealand Post' logo. Below it are navigation links: 'Home | My Profile | Logout'. The main area is titled 'Address Book' and contains a search criteria section with fields for 'Results Per Page' (set to 10), 'Search Filter' (Name, No Filter), 'Address Book' (Public and Private Address Books), and 'Sort By' (Company Name). Below this is a table of results with columns for Code, Company Name, Town, and Post Code. The 'Import Addresses' button is highlighted with a red box. A red arrow points from this box to the 'Browse...' button in the 'Please locate the file you wish to upload on your computer using the 'browse' button below.' section. This section includes 'Import Options' with checkboxes for 'Clear address book before import', 'Overwrite matching address codes', 'Warn for missing postcodes', and 'Import into global address book'. Below these are 'submit' and 'back to address book' buttons. The 'File Format Notes' section explains that the file must be plain ASCII and contain comma-separated fields: AddressCode, Company Name, Building, Street, Locality, Town, County, Postal Code, Country, Contact Name, Telephone, Extension, Fax, Mobile, Email, Service Code, Weight, Pieces, Insurance, Cost Centre, Goods Type, Notes, Email Alert. It also notes that AddressCode, Company Name, and Country are mandatory fields.

① **Browse**

Use this to locate the file to upload. This file must be a spreadsheet saved in .csv format. See below for tips on how to create your .csv file.

② **Clear address book before importing**

Tick this option to reset your existing address book before uploading. Please note that once the original data is cleared it cannot be recovered.

③ **Overwrite matching address codes**

Tick this box to allow matching address codes to be overwritten. Please note that once this has been overwritten the old data cannot be recovered.

④ **Warn for missing postcodes**

Tick this box if you want to be informed when a postcode is missing from an entry being uploaded. *Recommended.*

⑤ **Import into global address book**

Tick this option if you want your file to be uploaded into the public address book. Left unchecked, RedClick will upload your file into your private address book only. It is recommended that all addresses be stored in your organisation's global address book.

⑥ **.csv format**

Details the required headings for your .csv file to be successfully uploaded.

How do I create a .csv file to upload?

RedClick's upload function uses .csv files which are created in a spreadsheet program, such as Microsoft Excel.

Create a spreadsheet with column headings matching those detailed by reference point⑥ in Diagram 14.

For your convenience a template .csv file is available for download from www.nzpost.co.nz/redclick

Once you have created your file, save it as a .csv file as shown below.

Save as:

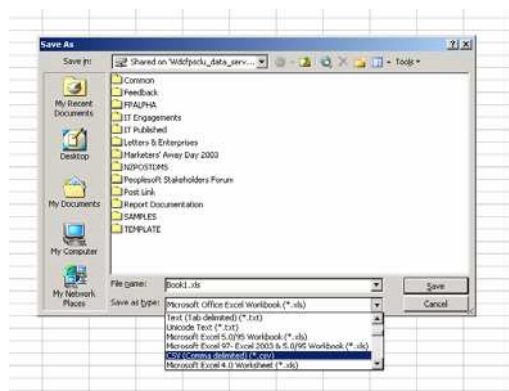


Diagram 3

Contact information can also be captured by setting your User account to automatically save all addresses into your address book when placing lodgements.

Editing your address book

If you wish to edit an existing contact, click the “edit button” next to that contact.

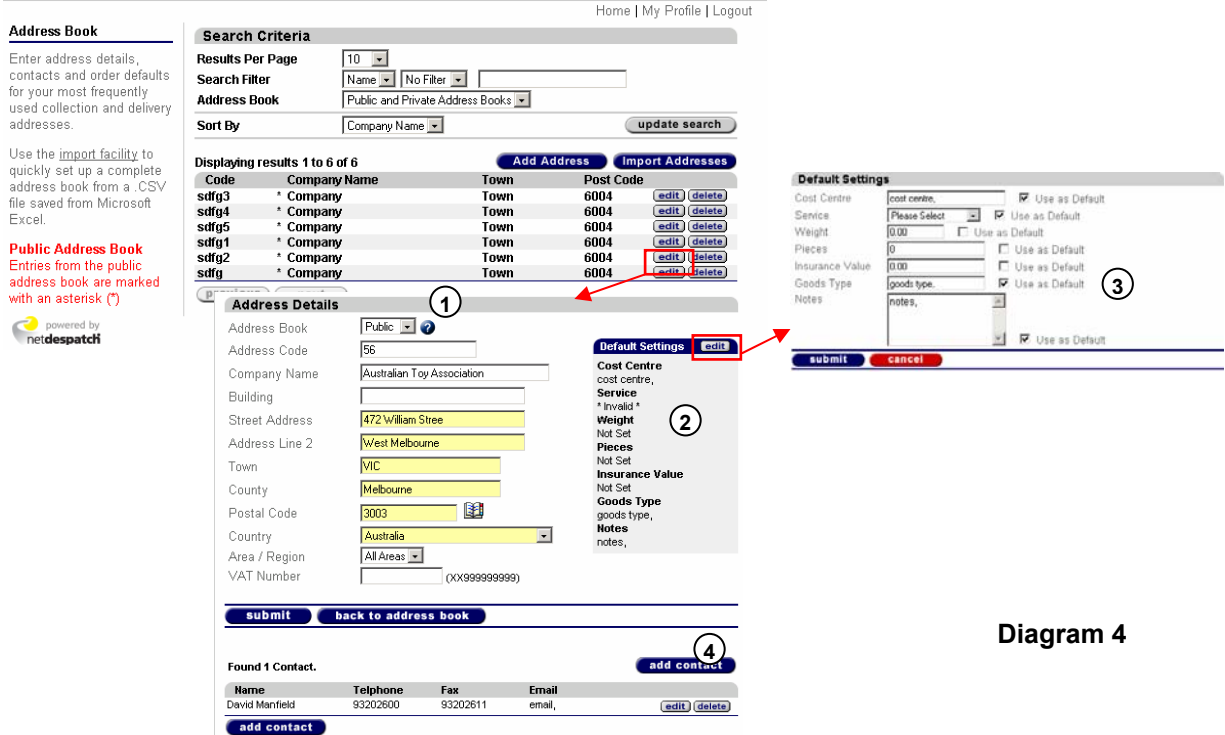


Diagram 4

- ① Address details
Alter any information in the appropriate fields.
- ② Settings
This displays the current default settings for this contact entry.
- ③ Edit default settings
To change, click “edit”. These default settings determine which fields will be automatically completed when this entry is used for a lodgement.
- ④ Contacts
This section displays contacts that are connected to this address book entry. To add new contacts, click “add contact”. To edit a contact, click the “edit” button.

Adding/editing contacts to an address book entry



Diagram 5

- ⑤ Contact details
Use this section to add/edit details linked to this address book entry.

Understanding cost centres

Cost centres can be created within the lodgement section of **RedClick**. When making a lodgement, you have the option to assign a cost centre to it. You can also add/edit new or existing cost centres in this menu.

Any User can add new cost centres, or edit existing ones, at any time.



Diagram 6

① List of cost centres

To assign a cost centre from the list to your lodgement, click on your chosen cost centre.

② Deleting a cost centre

To remove a cost centre from the list, click on the “minus” symbol ②

③ New cost centre

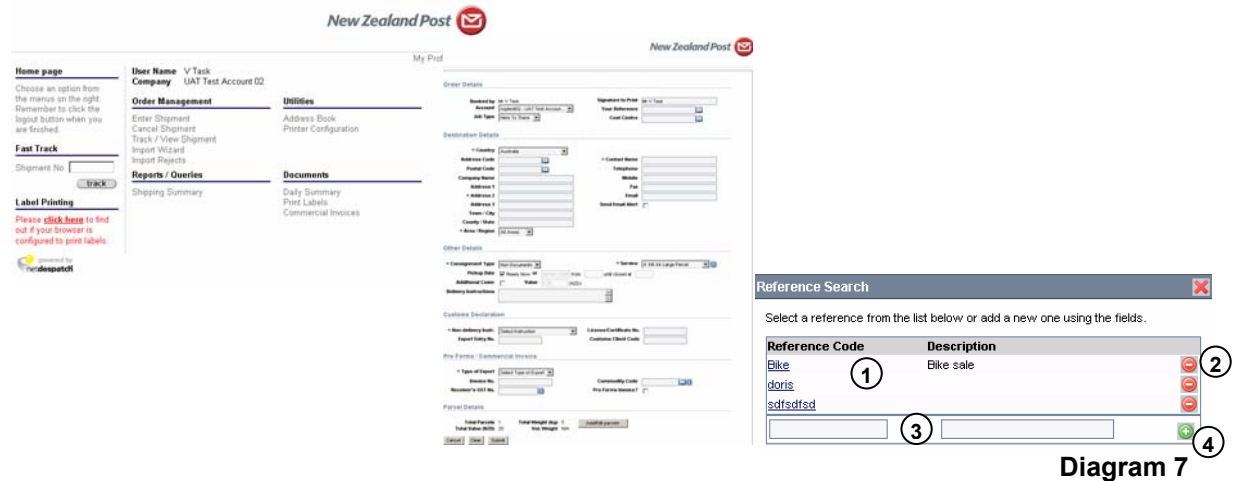
To add a new cost centre to the list, fill in the two fields and click the “+” symbol ④.

To edit a cost centre, remove it from the list with the “minus” symbol and add the new information into the cost ② centre list.

Sender's references

When placing a lodgement, you can assign a sender's reference. This reference is for your internal use only, allowing you to easily locate specific lodgement(s). Please note: the sender's reference does appear on your printed consignments.

A sender's reference could be an item descriptor, for example "Bike" or "August Board Papers", or an internal order number e.g. "Invoice# 1234".



① List

To add a sender's reference from the list to your lodgement, click on your chosen sender's reference.

② Sender's reference removal

To remove a sender's reference from the list, click on its "minus" sign. ②

③ New sender's reference

To add a new sender's reference to the list, complete the two fields with a reference code and description and click the "+" button. ④

To edit a sender's reference, delete it from the list with the minus button and re-enter the updated information to the sender's reference list. ②

Any User within your organisation can add new references or edit existing ones. It is an organisational decision for you to decide your policy on sender's references. This will be decided upon as part of the Super User set up process.