Managing your address book

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Managing your address book manually

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

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

For further assistance please contact the RedClick help desk on 0800 424 805 during New Zealand business hours (9am – 5pm)

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 point ⑥ 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.
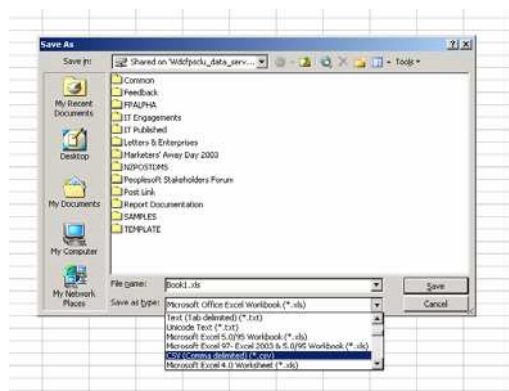
Save as:

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.
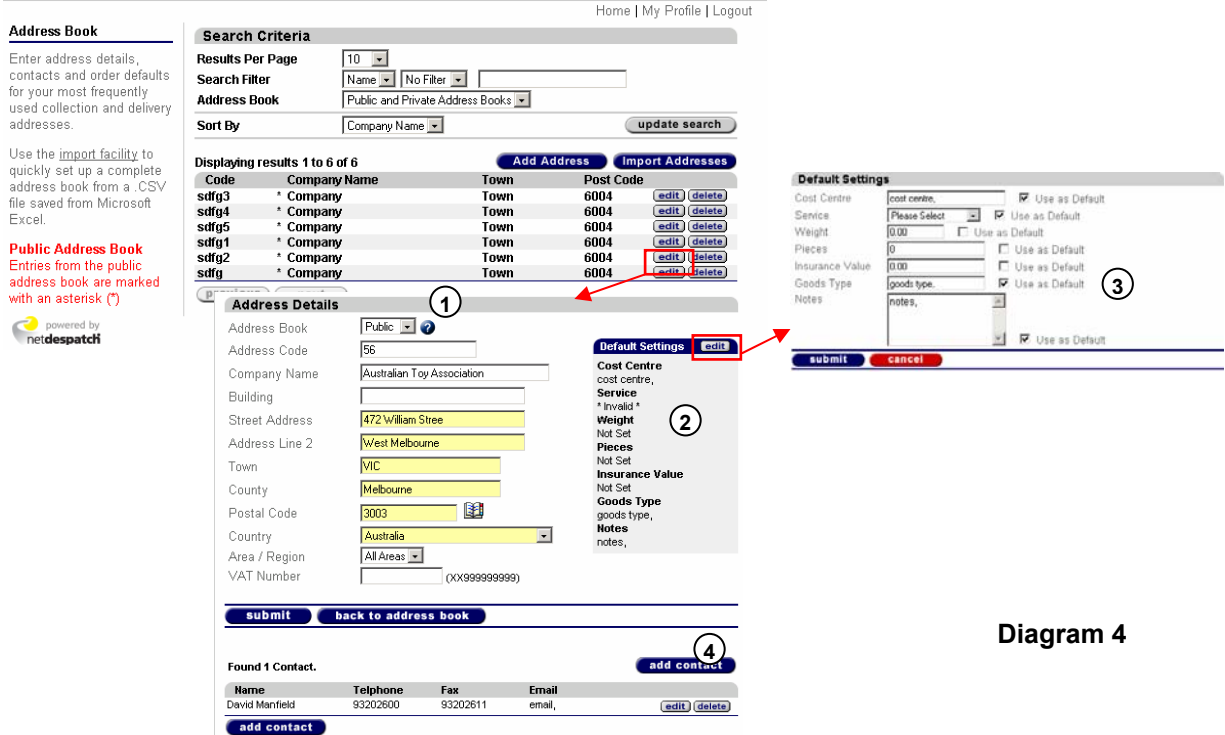
Diagram 4

(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" symb②

③ **New cost centre** — To add a new cost centre to the list, fill in the two fields and click the "+" sym④l.

To edit a cost centre, remove it from the list with the "minus" symbol and add the new information into the cos②entre 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".

Diagram 7
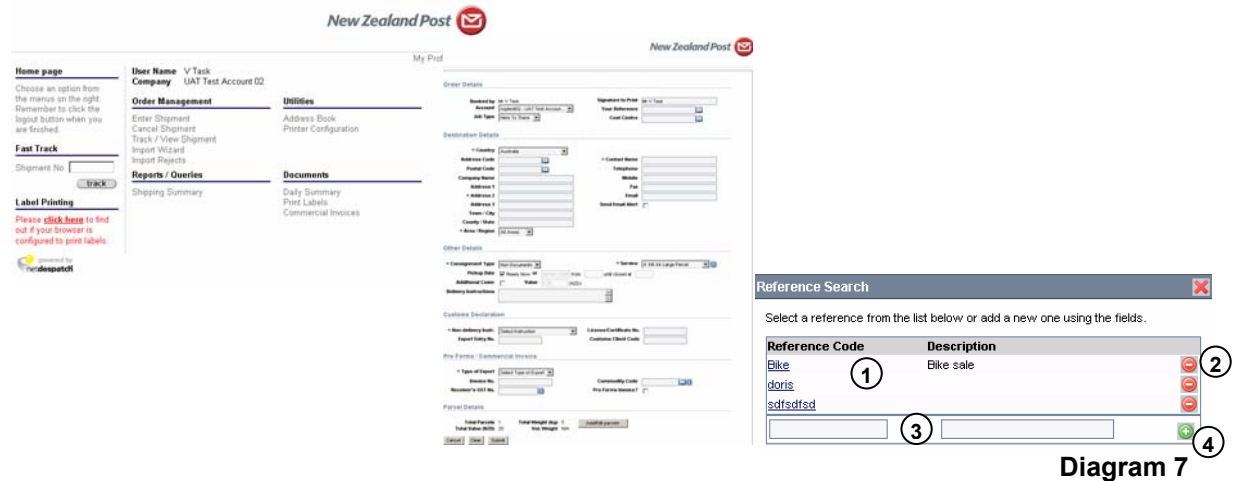
①	**List**	To add a sender's reference from the list to your lodgement, click on your chosen sender's reference.
②	**Sender's reference removal**	To remove a sender's reference from the list, click on its "minus" sign. ②
③	**New sender's reference**	To add a new sender's reference to the list, complete the two fields with a reference code and description and click the "+" button④
		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.