

HOW TO TRANSFER CONTACTS FROM TOLL CONNECT



Moving to MyToll

Your existing address book or contact list can be extracted from Toll Connect and uploaded to MyToll. Follow the instructions in this guide to make the necessary changes to the file and contact list format. You may require assistance with this process, and we're here to help.

EXTRACT RECEIVERS FROM TOLL CONNECT

REFORMAT RECEIVERS' INFORMATION

UPLOAD CONTACTS TO MYTOLL

ADD SENDERS

EXTRACT RECEIVERS FROM TOLL CONNECT

Make sure the following file is available on the PC which Toll Connect is on:

- MyToll Receivers Export Config.xml

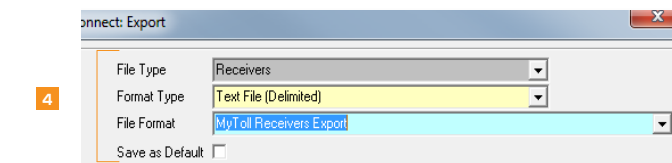
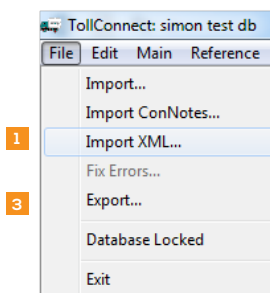
Log on to Toll Connect

1. Go to the file in the main menu, select **IMPORT XML**
2. Go to the folder containing your XML file, select **MYTOLL RECEIVERS EXPORT CONFIG.XML** and **OPEN**

To export the Receivers file

Select the Receivers icon from the panel on the left

3. Go to the file in the main menu, select **EXPORT**
4. Select the following options, click **OK**:
 - File Type: Receivers
 - Format Type: Text File (Delimited)
 - File Format: MyToll Receivers Export
5. Add a name for the Receiver file, select **SAVE**



REFORMAT RECEIVERS' INFORMATION

Some changes are required for the Receiver export file to be compatible with the MyToll contact format

Open your **FILE** in Excel

6. Change the **HEADERS** to match the MyToll format
7. Add information to **MANDATORY FIELDS**, which includes:
 - ContactName
 - ContactNumber
 - CompanyName
 - Address1
 - Suburb
 - State
 - Postcode
 - Country
 - AddressType

6	MyToll - Required Format	Toll Connect - Senders Format	Toll Connect - Receivers Format
	Alias	Sender ID	Receiver ID
7	ContactName*	Address Contact	Address Contact
	ContactNumber*	Address Phone	Address Phone
	ContactEmail	Address Email1	Address Email 1
	CompanyName*	Sender Name	Receiver Name
	BusinessTaxNumber	Tax ID	Tax ID
	Address1*	Address Line1	Address Line1
	Address2	Address Line2	Address Line2
	Suburb*	Address Suburb	Address Suburb
	State*	Address State	Address State
	Postcode*	Address Postcode	Address Postcode
	Country*	Address Country	Address Country
	Instructions^	Address Special Instructions 1, 2 & 3^	Address Special Instructions 1, 2 & 3^
	NotifyEmail1	Address Email Notify1	Address Email Notify1
	Email2	Address Email2	Address Email2
	NotifyEmail2	Address Email Notify2	Address Email Notify2
8	AddressType*		
	SiteOpeningTime		
	SiteClosingTime		
	DGContactName		
	DGContactNumber		
	DefaultReference		

8. Add the **ADDRESSTYPE FIELD VALUES: S** (Sender), R (Receiver), or G (General, which acts as a Sender and Receiver)

Note: This is a new field

9. **SAVE** as Excel file (.xls or .xlsx)

NOTE: MyToll ignores any additional columns that are not recognised

NOTE: The maximum upload limit per file is 10,000 entries

Log on to MyToll and navigate to **MY PROFILE**

UPLOAD CONTACTS TO MYTOLL

Navigate to **MANAGE CONTACTS**

NOTE: Download the "Guidelines Document" for more information on how to upload or download contacts

10. Select **FILE** to upload

11. Click **UPLOAD**

MyToll will produce an alert for any errors in the upload. Open the file in Excel to correct any reported errors and try the upload again.

12. Once all contacts are successfully validated, choose how you wish to manage these new contacts:

- Add new contacts to the existing contact list
- Replace existing contact list with the new contacts

Make your selection and select **CONTINUE** to apply the changes

ADD SENDERS ON MYTOLL

Navigate to **CONTACTS**

13. Click **ADD CONTACT**

14. Start typing and select the address
MyToll's address validation feature provides you with a list of matching addresses to select from.

15. Click **CONTINUE**

NOTE: Click **ADD MANUALLY** to manually add the address, if you are unable to find the address in the list

16. Complete contact details, including:

- Assigning an **ALIAS**, for quick contact searching/ lookup
- Saving the contact as a sender

17. Click **SAVE**

Configure contact settings

18. Add **EMAIL ADDRESSES**

NOTE: Select the email address you want MyToll to send Advance shipping notice to. Add up to 10 email addresses to a contact

19. Add a **TOLL CARRIER ACCOUNT**

NOTE: Add a Toll carrier account to the contact to prefill the account number field when creating transactions. Add default billing accounts for each Toll carrier, and apply as a sender.

20. Select **SAVE**

READ THIS NEXT:
Quick Reference Guide
How to transfer templates from Toll Connect

For more Help and Tips visit mytoll.com

mytoll.com

© 2019 Toll Holdings Limited. All rights reserved