

HOW TO TRANSFER CONTACTS FROM TOLL LITE



Moving to MyToll

Your existing address book or contact list can be extracted from Toll Lite 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 ADDRESS BOOK FROM TOLL LITE

REFORMAT ADDRESS BOOK INFORMATION

UPLOAD CONTACTS TO MYTOLL

EXTRACT ADDRESS BOOK FROM TOLL LITE

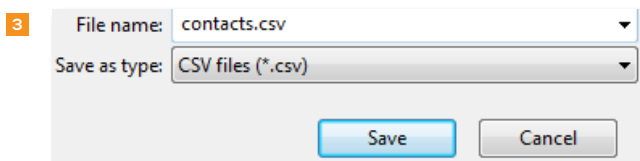
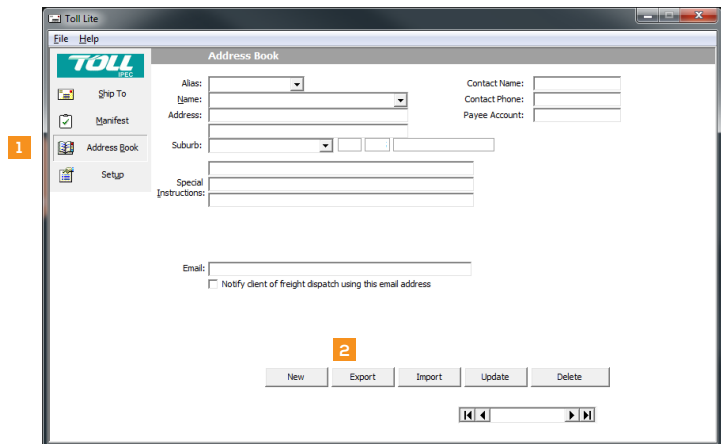
1. Open Toll Lite and select *ADDRESS BOOK*
2. Select *EXPORT*
3. Add a name for the file, select *SAVE*

REFORMAT ADDRESS BOOK INFORMATION

Some changes are required for the contact format files to be compatible with the MyToll format.

Open your *FILE* in Excel

4. Change the *HEADERS* to match the MyToll format, including removing additional space before names
HINT: MyToll column names are case sensitive
5. Add information to *MANDATORY FIELDS*, which includes:
 - ContactName
 - ContactNumber
 - CompanyName
 - Address1
 - Suburb
 - State
 - Postcode
 - Country
 - AddressType
6. Add the *COUNTRY VALUE* as AU for each contact
7. Merge *SPECIALINSTRUCTION FIELDS 1, 2 & 3* into a single instruction field
8. Add the *ADDRESSTYPE FIELD VALUES*: S (Sender), R (Receiver), or G (General, which acts as a Sender and Receiver)



4	MyToll - Required Format	Toll Lite - Contacts Format
	Alias	Alias
5	ContactName*	ContactName
	ContactNumber*	ContactPhone
	ContactEmail	ContactEmail
	CompanyName*	Name
	BusinessTaxNumber	
	Address1*	Address1
	Address2	Address2
	Suburb*	Suburb
	State*	State
	Postcode*	PostCode
6	Country*	
7	Instructions^	SpecialInstructions1, 2 & 3
	NotifyEmail1	Notify
	Email2	
	NotifyEmail2	
8	AddressType*	
	SiteOpeningTime	
	SiteClosingTime	
	TollIPECSenderAccount	
	TollIPECReceiverAccount	AccountNo
	TollIPECReceiverPaysFlag	

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.

9. Select *FILE* to upload

10. Click *UPLOAD*

NOTE: 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.

11. Once all contacts are successfully validated, choose how you wish to manage these new (revised) 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

The image shows a sequence of screenshots from the MyToll 'MY CONTACTS' page. The first screenshot shows the 'Download contacts' and 'Upload contacts' sections. The 'Upload contacts' section has a 'Select file' button and an 'Upload' button. The second screenshot shows a confirmation dialog titled 'Update contacts' for 'sampleAddressBook.xlsx', with a 'Ready for upload' status and a 'Summary' section indicating '1 contact validated'. It offers two options: 'Add new contacts to the existing contact list' (selected) and 'Replace existing contact list with the new contacts'. The third screenshot shows an 'Upload' error message for 'sampleAddressBook.xlsx' stating 'Errors detected: 1 error to be removed'. The error table shows row 2 with the description 'Invalid contact number, please refer to MyToll Guidelines - Importing Contacts'. Below the table, it says 'Please fix the errors identified above in the uploaded file and upload again.' and has an 'OK GOT IT' button.

ADDRESS VALIDATION CHECKS ON MYTOLL INCLUDE:

- Country must contain a valid country code
- Address line 1 & 2 cannot contain items like Locked Bag, PO Box, etc
- All fields must fit within their maximum allowed character length
- All fields should not contain invalid special characters
- Abbreviations like Mt Gambier are typically invalid, but some exceptions exist, like St Ives
- Suburb names must be in the correct order (ie Coburg North is valid, North Coburg is invalid)
- Most suburbs with DC at the end are invalid
- Postcodes in the ACT/NT will fail if Excel has removed the leading 0. Format the cell as text to help prevent this
- Phone numbers must follow set formats, with country code, area code (with or without the leading 0), and the phone number itself: 61-03xxxxxxx (Australian landline), 61-434xxxxxx (Australian mobile), 61-1300xxxxxx (1300 or 1800 numbers)

READ THIS NEXT:
Quick Reference Guide
How to configure your profile settings

For more Help and Tips visit mytoll.com