

HOW TO CONFIGURE YOUR PROFILE SETTINGS



Configure your profile settings for ease and efficiency

MyToll offers a wide range of options to help reduce repetitive data entry, improve accuracy and increase transaction speed by customising and saving frequently used information to your MyToll profile.

ADD CONTACTS

CREATE TEMPLATES

CONFIGURE USER SETTINGS

SET NOTIFICATION PREFERENCES

Navigate to *MY PROFILE*

MY CONTACTS

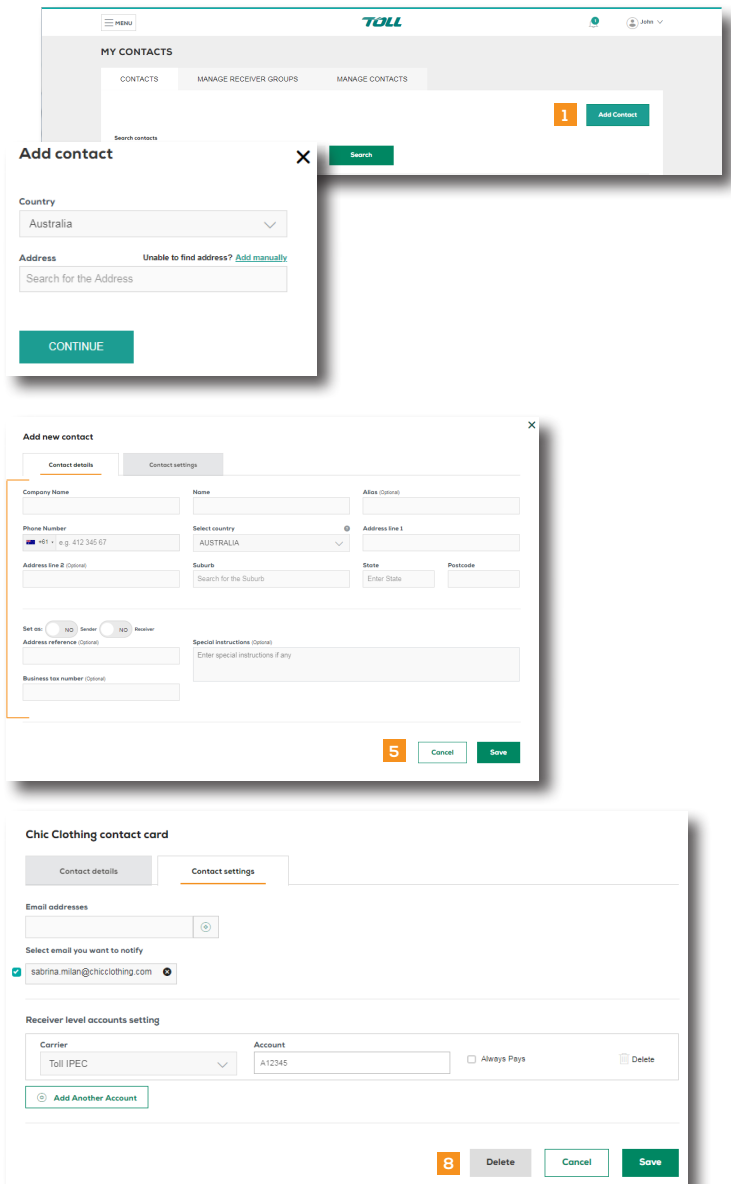
Add, edit and delete individual contacts

Add contacts

1. Click **ADD CONTACT**
2. Start typing and select the address
MyToll's address validation feature provides you with a list of matching addresses to select from.
3. Click **CONTINUE**
NOTE: Click **ADD MANUALLY** to manually add the address, if you are unable to find the address in the list
4. Complete contact details, including:
 - Assigning an **ALIAS**, for quick contact searching/lookup
 - Saving the contact as a sender and/or receiver
5. Click **SAVE**

Configure contact settings

6. 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
7. Add a **TOLL CARRIER ACCOUNT**
NOTE: Add a Toll carrier account to the contact to prefill the account number field when creating transactions. Set the receiver contact to **ALWAYS PAYS**. Add default billing accounts for each Toll carrier, and apply as a *sender* or *receiver*.
8. Select **SAVE**



Create and manage receiver groups

Send a shipment to multiple receivers at the same time

Navigate to *MANAGE RECEIVER GROUPS*

NOTE: Create a receiver group from existing contacts list and *check the receiver group* checkbox when creating a shipment

9. Click **ADD NEW RECEIVER GROUP**

10. Name and assign an alias name to a receiver group

11. Select contacts from the available receiver addresses list and add to the my receiver group list

12. Click **SAVE**

NOTE: Manage and remove contacts from the existing receiver groups by selecting the contacts in the *my receiver group list* and click *remove*

Bulk upload/download contacts

Bulk upload and download contacts in an Excel (XLS) file. Upload up to 1,000 contacts at a time.

Navigate to *MANAGE CONTACTS*

NOTE: Download the document guidelines for details on how to upload/download contacts

13. Click **DOWNLOAD CONTACTS**

If you already have contacts in your MyToll profile to edit or replace and save the excel file to your local device

14. Select **FILE** to upload

15. Click **UPLOAD**

MY TEMPLATES

Add, edit, download and delete templates for your approved Toll carriers and services

Add templates

Navigate to My Templates

16. Click **ADD TEMPLATE**

17. Add **DESCRIPTION** and assign an **ALIAS** name to the template

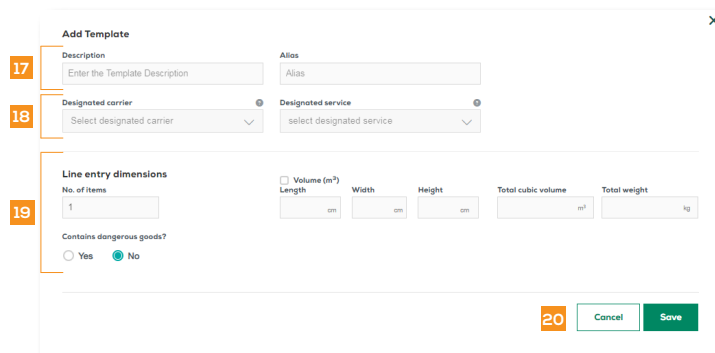
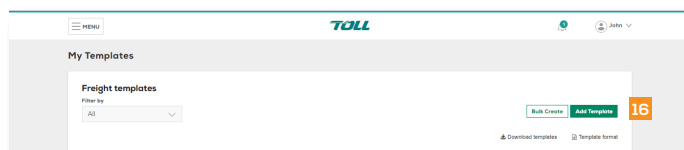
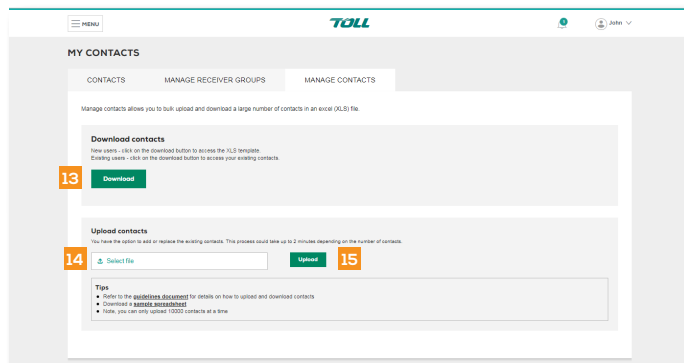
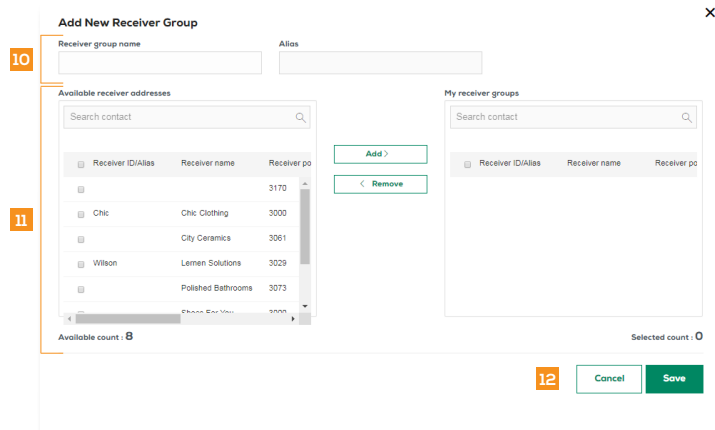
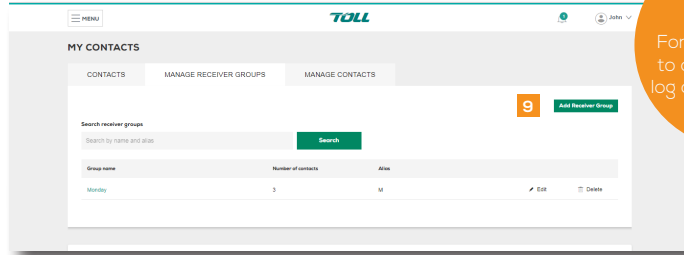
18. Select designated carrier and service

NOTE: If you designate a carrier and service to the template, it is only available when using those services

19. Add **SHIPPING LINE ITEM** dimensions

NOTE: You can also create dangerous goods shipment templates by saving dangerous goods information

20. Click **SAVE**



Bulk create templates

Bulk upload templates in an Excel (XLS) file.
Upload up to 1,000 records at a time.

21. Click **BULK CREATE**

NOTE: Download the document guidelines for details on how to upload/download templates

22. Click **DOWNLOAD** sample Excel template, update and save to your local device

NOTE: If you already have templates in your MyToll profile, you can download these in an Excel file to edit or replace existing templates

23. Select **CHOOSE FILE TO UPLOAD**

NOTE: You can edit or delete templates at any time

MY USER SETTINGS

Configure feature and system default settings.

Set preferred carriers

Assign a preferred carrier for fast data entry of shipment, pickup and returns.

24. Select preferred carrier for Shipments, Pickups, Rate Enquiry, Returns and the default Sender address for your profile

25. Click **SAVE**

NOTE: If you use returns, you can also set a preferred alternate address

Configure carrier level settings

26. Click **OPEN & EDIT** for each carrier in your profile

NOTE: Many carrier specific options can be toggled on or off to control whether you see specific fields when creating a shipment

27. Select the default service, and the default payer and payer account number for the carrier

28. Click **SAVE**

NOTE: If you select YES to the Manifest Notification, add email addresses of who gets notified

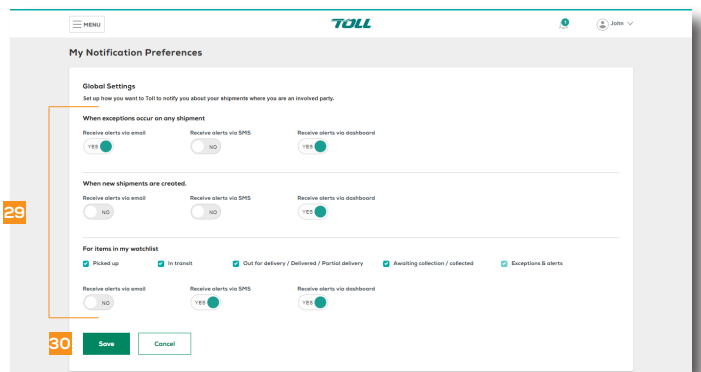
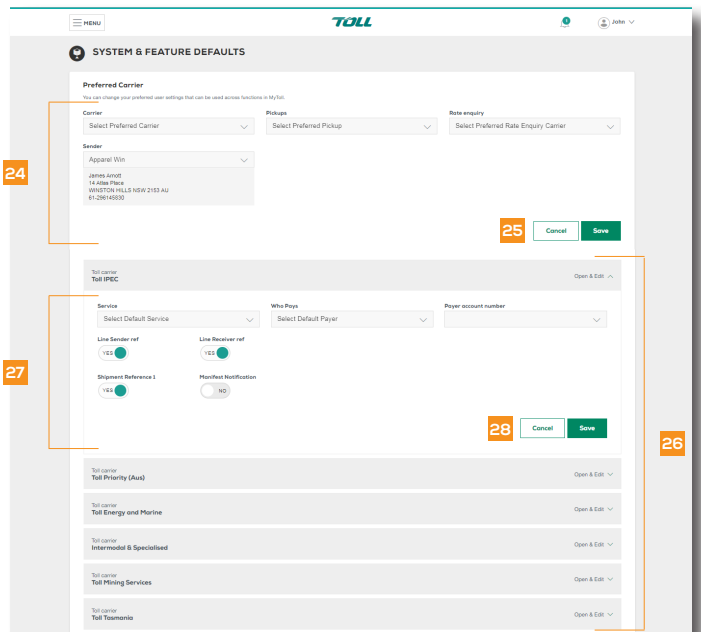
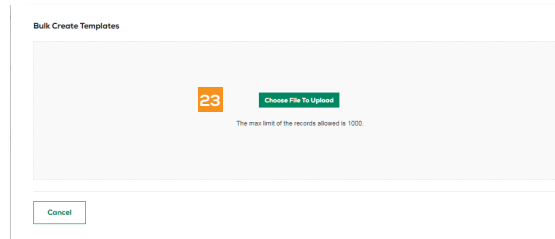
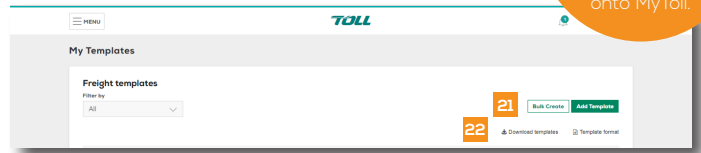
MY NOTIFICATION PREFERENCES

Configure your notification preferences to control when and how you would like to receive notifications about your shipments where you are an involved party.

29. Select to receive alerts via email, SMS or the MyToll dashboard

NOTE: You are an involved party if you are a sender, receiver or a payer on the shipment. Notification preferences settings will be applied across all accounts in your profile

30. Click **SAVE**



? READ THIS NEXT:
Quick Reference Guide
How to set your printer and configure printing settings

i For more Help and Tips visit mytoll.com
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