

Contacts

Introduction

The “Contacts” feature lets you enter contacts’ information in the program as not to have to reenter them every a document is made.

The simplest way to use contacts is while editing a document, next to some boxes there is a small magnifier glass icon, click it to open the contacts window. In there you will see the list of contacts and will be able to search by the contact’s name. If you have not entered the contact yet click on “Add” to add it.

Creating a new contact

When creating a new contact you will have to enter the following information:

- Name: a name to identify the contact in the list
- Type: the type of contact, it can be:
 - Regular: use this for shippers, consignees and such. This is the type you will most use.
 - Airline: this option will let you add new airlines to the program. Some airlines are already preloaded in the program, but more can be added this way.
 - Agent: this is used to enter information of an agent. Most of the time you would enter just one agent: you.
 - Sea carrier: to enter information about carriers to be used in B/Ls and other sea documents
 - Other: any contact that does not match any of the above categories
- The contacts details: depending on the type of contact the information that you have to enter will be different.
 - For regular clients
 - Account number to be used in AWBs
 - Text, this should contain the name of the contact and the address information, this text is what will appear in the documents
 - Cargo-IMP, in case you will be using Cargo-IMP enter the contact’s information in that tab
 - Invoice: in case you want to have different information for the clients in the invoices use this tab. In this box you must include all contact’s text including name and address, but in here you may enter tax information for example.
 - For Airlines
 - In Issued by enter the text to appear in the documents
 - Airline prefix is the three digits airline prefix code, for example 001 for American Airlines.
 - Two letter code that identifies the airline
 - For Agents
 - AWB Agent: in this area enter the information to appear in the MAWBs and HAWBs in the “issuing carrier’s agent” area in the AWB
 - House AWB: this text will appear in the “Issued by” box when creating a HAWB

- Cargo-IMP: in case you are using Cargo-IMP enter the agents information in that tab
 - B/L: text to appear in the B/Ls as Agent
 - Invoice: text to appear in the “Issued by” box in the invoices
- For sea carrier
 - Text: the text to appear in the sea-related documents as carrier, for example in the IMP DGD
- For others
 - The text to appear in the corresponding box

Inferring data

If data is missing, for example if for a regular contact you do not enter the invoice text and you select the contact in an invoice then the program will use the text for the AWB. Or if only the Cargo-IMP information is entered it will generate the text for paper AWB from that information.

Generate the account number

When creating regular contacts it is possible to generate the account number. To achieve this first enter a starting number in Database->AWB Number and on the right enter the number for “Contact account number”.

After entering the first number to be used in there, when a new contact is created the option “assign account number on save” will be enabled and selected. Enter the information of the contact and when you save it the account number will be generated.

Contact list

Contact are also accessible from Database->Contacts.

Default contact and logo

When using the contact finder after clicking on the magnifier glass icon, you will notice that for some boxes a text like “default Agent for AWBs” will appear, when selecting this option you will make the selected contact to be preloaded in all the new documents that you create. This is very useful to have your company’s information preloaded in all documents.

And for some other boxes, for example the “Issued by” box in the HAWB, there is the option to select a logo for the field. In the box below the logo option will appear a preview of the logo, if you have not selected any logo click on “modify” to enter the logo.

Entering a logo

The logo is basically an image, in the window to enter the logo click on “Browse” to look for an image to use as logo, then the image will be loaded in the preview box. Optionally you can enter some text, the text will appear as you see it in the preview box below the logo. When done click on “Accept”.

The logo can also be modified from File->Configuration and on the left select “Logo”.

Importing contacts

It is possible to import contacts from a CSV file. Those files are Excel-like files – if you have an Excel file with your contacts then save it to a CSV file (there are many subtypes available, select anyone), then from the program do the following:

1. Go to Database->Import contacts
2. Use the “Browse” button to find the file with the contacts
3. Look at the preview at the bottom, data should be separated in columns, if not then change the “Separator” option until data is spaced in columns
4. If the first row in the preview has the title of the columns then select the option “first line is header”, after that the row will be removed from the preview
5. Edit the columns option, for example if in the preview the name of the contacts appears in the column 1, then in the “Name” option select “1”. Do the same for all the information.
6. After selecting all the information click on “Import”. After that new contacts should be created.