How To Set Up My Contacts

Creating and maintaining a list of current pick-up and delivery contacts is one of the most efficient ways to become faster at booking new orders because, once they are in the system, all you need to do is start typing their name and our auto-complete feature will kick-in to instantly finish completing all necessary information, including any special pick-up or delivery notes.

Upon logging into the Dashboard site, the first thing you will see is the home screen.

A. From the "Navigation Toolbar" on the left, click on the "My Contacts" icon, it is the third icon from the top.
B. This will take you to your address book.
C. To add a new contact, click the blue "New Contact" button at the top left corner of the window.
D. This will take you to a blank "edit contact" form.
E. Fill out the form with the pertinent information associated with the contact you would like to add to your address book.
   a. There is an "Account Contact" check box at the bottom left corner of the "edit contact" form.
   b. By default, this box is checked, if you only want this contact to be visible under your login then uncheck the box, otherwise it will be shared with all account users.
   a. Click the green "Save" button to complete the process of adding your new contact. This will return you to the "My Contact" page.
F. On your main "My Contact" page you will see all the contacts you have added to your address book.
   a. The address book displays 10 contact addresses per page.
      i. You can toggle back and forth between pages using the navigational arrows in the bottom left corner.
   b. The first column on the left is the "favorites" column.
      i. You can set your main or favorite contact as the default contact for your account by clicking the star associated to that contact.
      ii. This will turn the star "gold" and set it as the default pick up location for every new order created.
   c. You can sort any column in ascending or descending order by clicking on the column header name.
   d. You can use the filters at the top of each column to search for a specific contact.
      i. Simply Click on the "Contact Name" filter and a pop-up box opens with drop down selections.
      ii. The filter gives you several ways to search, select the filter criteria from the drop-down box and enter the value in the box below the criteria.
         1. Once completed click the blue "Filter" button.
      iii. If you would like to clear a filter, click the white "Clear" button.
   e. To "**Delete"** a contact from your address book, click on the trash can in the far-right column of the contact you would like to remove.
      i. You will get a confirmation pop up box asking you to confirm deletion of the contact.

Now that your contacts are set-up, it's easy to place orders. Place an order today!