

USER GUIDE

Phone: 0800 783 783 ticket-itsupport@courierpost.co.nz

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Using Ticket-it

Ticket-it is CourierPost's new online label printing application. With Ticket-it you can print labels for individuals and for bulk mail outs. You can set up groups of customers or define templates to make bulk label printing faster and easier. Add Ticket-it to your browser favourites or put a shortcut on your desktop for quick access.

Login

When each user at your company is set up in Ticket-it, they will receive an email with their username (email address), initial password and the link to the webpage.

To login for the first time:

- 1. Open the Ticket-it email.
- 2. Click the link to Ticket-it.

Note: You should save the login screen as a "favourite" within your browser and / or save the location as a shortcut on your computer desktop.

Subsequent logins:

- 1. Click the desktop shortcut, or
- 2. Open Ticket-it from your browser favourites.
- The Ticket-it validation screen opens first. Once validation is complete the login screen automatically opens.
 - 3. Enter your username (this is your email address).
 - 4. Enter your unique password.
 - 5. Click the login button.

Forgotten password



- 1. Click the Forgot password? link.
- 2. Enter your username.
- 3. Click the retrieve button.
- An email will be sent to your email account with a new password.
 - 4. Check your email.
 - 5. Follow the login process as above.
 - 6. Your password will expire and you will need to set a new one.
 - 7. Type a new password of at least 8 characters plus one unique character (e.g. a number or character such as \$, %,#).
- To create a shortcut to Ticket-it or to add to favourites, point to the title bar and right mouse click. Choose your option from the drop down menu.

Getting around

Single left click on a menu name to open it.

See the image below.



Default pages

In Administration/user preferences you can set a default page for Ticket-it to open to. However, you can at any time define another of the Labelling pages to be a default by clicking on the link displayed on the right hand side of the red title bar.



- Anytime you click away from then back to labelling this page will now open.
- The user preference default page still opens when you first login.
- You can change the new default at any time by clicking on the link on a new page.

You might use this option if, for example, you are going to do a lot of batch labelling today - click the link and make this your default. Later you can click the link on the quick labelling page to reset the default.

Set printer defaults



This step only applies if your site has chosen to install ActiveX.

- Your printer preferences must already be defined and the page size created (we recommend that you name it Ticket-it). Please refer to the separate printer installation guide for instructions.
- We recommend immediately setting the printing defaults the first time you access Ticket-it.
 - 1. Click Administration on the menu bar.
 - 2. User Preferences opens.
 - 3. Set the default printer to be the label printer.
 - 4. Set the Default page size to be the Ticket-it printer page name.
 - 5. Click the save button on the bottom left.

	User Preferences			
	Login Preferences		Your Details	
	Username/Email	sheri.fox@nzpost.co.nz	First Name	Sheri
	Current Password *		Last Name	Fox
	New Password *			CD+
	Confirm New Password *		Company Name *	
	SAVE		Address 1 *	151 Victoria Street West
Choose your label			Address 2	
printer	User Defaults		Address 3	
	Default Label Printer		Town/City *	Auckland
	Zebra LP2844-Z	•	Suburb *	CBD AKL
0	Default Printer Page Size	Ticket 💌	Country	New Zealand
Choose the page	Default Page	Quick Labelling	Postcode	Postcode Finder
setup name	Default Site Code	189824 💌	Phone	
	Default Sender Address	Site Default Sender	Mobile	
		189824 CP IT ONLINE S	SAVE	
		112750 Rob Telecom T2 -		
	SAVE			
	\ Sa	ave the preference		
	ch	anges		

You need to do this once per username.

Quick Labelling

Printing labels consists of three steps:

Step 1 – Address details – Find the receiver's details

Step 2 – Shipment details – Define the item(s) to be sent

Step 3 – Print labels – Review the label(s) and send to printer

Note: A receiver is the person or company you are sending packages to.

Use *Quick labels* to print labels for an individual receiver who exists in your address list, or alternatively you can:

- 1. Add a new receiver to your address list and create a label for them all in one step, or
- 2. Create a label for a one off receiver without saving their details to your address list.

Using the tab key

Tab key functions are supported by Quick Labelling.

Use tab to move to fields and option buttons, and enter to select. Use the space bar to tick checkboxes. The Shift+Tab key (backwards tab) will take you back to the last tabbed field.

Some functions within Quick Labelling are not supported by the tab key, for example the Show filters and Edit links. Use the mouse to access these.



If you click away from Quick Labelling without completing the label print you will lose any data you have entered.

Quick Label screen showing the three steps required; options to search for, or to add receivers	Γ	Site code and sende address selection.
uick Labelling Batch Labelling Print From Template		BOOK A PICKUP
Step 1 - Address Details	Site Code	189824
Type to select a receiver ADD Show Filter Options + ADD NEW RECEIVER Add One-off Receiver	Sender	
Step 2 - Shipment Details 🔹 🕢 🕢		
Step 3 - Print Labels 🔳		

Step 1 - Address Details

Select sender address

When printing labels for your usual (default) site you do not need to perform this step.

However, if you are printing labels for a different location or company you need to select the correct site code and/or sender address from the drop down fields on the right hand side of the screen. (You will only see the site codes that were enabled when your account was set up.)

Site Code	189824 💌
Sender	CP IT ONLINE SM
	CP IT ONLINE SMAR
	TestSenderNew

- The site code is used for manifest and invoicing to ensure the correct site gets billed that is, it is the origin point for billing. The address you select simply displays on the label as the 'from' company name and address.
- For more information see the section on Sender Addresses.

Print label for an existing receiver

Search on their Quickname (this is a name that can be assigned to them; you could use your ERP Debtor codes), Company, Town/City or a combination of all these fields. **All** is the default selection – bypass steps 1 and 2 if you want to use the default.

- 1. Click the Show Filter options link
- 2. Select at least one option for searching.
- 3. Begin typing the receiver name in the search field. A drop down displays the results.
- 4. Click on the correct name.
- 5. Click the green Add button.

	Search options – All is the default. Click Hide filter options to close.	
Step 1 - Address Details	(HEEP)	
All 🔽 Quicknames 🔽 Company 🔽 Town/City	ADD Hide Filter Options + ADD NEW RECEIVER Add One-off Receiver	
Beekeeperrs , 21 Harbour View Road , Point Wells,RD 6 Contact: Jono	Warkworth Edit	
Customer Reference Item Inventory Details Bee0108 July Specials		Click to open and edit
Delivery Instructions		the receiver's address. For existing receivers the
PROCEED TO SHIPPING	Notes are for your information only – they are not printed on the labels.	For one-off you are just modifying the temporary details.
Step 2 - Shipment Details	E .	
Step 3 - Print Labels		

Alternatively:

- Use the tab and enter keys to move to fields and make selections.
- Add customer reference information, delivery instructions or inventory notes.
 - 6. Click in the required field and type the details.
- To make changes to a receiver's address (delivery instructions, contact name, phone number etc.) and have them saved, click the edit link. Make changes and then save.
- When you have entered all your requirements
 - 7. Click the Proceed to Shipping button.

Print label for and add a new receiver

- 1. Click on the yellow Add New Receiver button.
- A new window opens for you to enter all the details relating to this receiver. Fields marked * are mandatory.

	Add New Receiver			
	Company* Farm Fresh Quickname 981076 C Street Address C PO Box / Private Bag # UnitNo/Apt No/Bid No Building Name	Contact * Phone Number * Mobile Email Fax Group Names		Select the code(s) that
Addresses are validated and will drop down as you type.	Street No, Street Name, Suburb, Town/City.* TIP-Find the suburb by inserting % after the street and before the town/cit Click-here if you can't find street number. Country * New Zearend Postcode Delivery Instructions Customer Ref	y. Site Code(s) Confirmation Emails	189824 C Yes © No	can access this receiver's address. If not selected then users at those site codes will not see the receiver.
	Howeve street nu cannot b click her	r, if the Imber e found, e		

- 2. Complete at least the mandatory fields.
- 3. To add a valid address for the receive see Adding addresses.
- 4. Click the Save button. The receiver will be added to your address list.
- Add customer reference information, delivery instructions or Inventory notes.
 - 5. Click in the required field and type the details.
- When you have entered all your requirements
 - 6. Click the Proceed to Shipping button.

Print label for a one-off receiver

- A one-off is a temporary record. This may be a receiver you do not normally do business with.
 - 1. Click the Add One-off Receiver link.
- A new window opens for you to enter all the details relating to this receiver. Fields marked * are mandatory.

One Off Receiver	
Contact* Company ⓒ Street Address 〇	JOJO Private Bag or PO Box
UnitNo/Apt No/Bld No Building Name	
Street No, Street Name, S	Suburb, Town/City*
<u>Click here if you can't find s</u> Postcode	treet number & name.
Country ADD <u>Cancel</u>	New Zealand

- 2. Complete at least the mandatory fields.
- 3. To add a valid address for the receive see Adding addresses.
- 4. Click the Add button. The details are NOT saved to your address list.
- Add customer reference information, delivery instructions or Inventory notes.
 - 5. Click in the required field and type the details.
- When you have entered all your requirements
 - 6. Click the Proceed to Shipping button.

Step 2 - Shipment Details

Choose the service and package types that you require labels for. You can include one or more services and package types to be sent to this receiver and define the number of each.



Select service and package

- 1. Click in the select service field and choose a service from the list.
- 2. Click in the package field and choose a package type from the list.
- 3. Click the green Add button.

Alternatively:

Use the tab and enter keys to move to fields and make selections. Use the down arrow to move through the options in the Service and Package fields. The Shift+Tab key (backwards tab) will take you back to the last tabbed field.

The record displays in a list.

- Add different service and package types, or more package types to the selected service, if required.
 - 4. Click in the Service field and choose a different service (optional).
 - 5. Click the package field and choose another package type from the list.
 - 6. Click the green Add button.
- Make any changes to the fields that may be required, e.g. increase the quantity of a package:
 - 7. Click in the quantity field, delete the default and type the number of packages.
 - 8. Click to tick the checkboxes for Sig, Rural or Sat if required.
 - 9. Click in the weight field and enter the known weight. This is a mandatory field.

Alternatively:

- Tab into each field and make changes. Tab to the Sig, Rural or Sat fields and press the space bar to select.
- For Rural and Saturday delivery you are still required to affix the appropriate stickers to the parcel.

The weight displayed in the details panel on the right hand side of the screen will be the greater of the physical versus volumetric weight. See Calculating Weights for more information. The panel updates when you proceed to printing.



- If a package has been added to the list and is not required you can remove it (see above):
 - 10. Click in the left hand checkbox to select the record.
 - 11. Click the Delete link to remove it from the list.
- When you have entered all your requirements
 - 12. Click the Proceed to printing button.

Add a custom package

You can add a custom package at any time.



Adding a custom package is permanent. For a one-off package type it is better to modify an existing package.

- 1. Click in the select service field and choose a service from the list.
- 2. Click the Add a Custom Package button.
- A new window opens for you to enter all the details relating to this package. Fields marked * are mandatory.

Custom Package			
Package Name *	Rot	tary Box	
Enter Dimensions (in	cm) if volum	e is unknow	n
Dimensions Cubic(m3)	Height 50	Length 60	Width 45
ADD PACKAGE	ancel		

- 3. Name your package.
- 4. Enter dimensions (in centimetres) or cubic volume (it is mandatory to enter one or the other).
- 5. Click the Add package button.
- The package is added to the package type field and is displayed in the list.

- 6. Modify the weight field to reflect the actual weight of this package.
- If necessary:
 - 7. Click in the quantity field, delete the default of 1 and type the number of packages.
 - 8. Click to tick the checkboxes for Sig, Rural or Sat if any of these options are applicable.
- When you have entered all your requirements
 - 9. Click the Proceed to printing button.

Step 3 - Print Labels

In this section you can print labels, use view details to ensure data is correct, include return labels or print return labels only. You can also cancel label printing if necessary.

Step 1 - Address Details	
Step 2 - Shipment Details	
Step 3 - Print Labels	HELP
You are about to print a ticket for bettycourierpost.co.nz.	
View Details	
C Add Return Label C ONLY Return Label	
PRINT LABELS	Cancel Printing of labels

- To view labels:
 - 1. Click the View details link.
 - 2. Click the Done button to return to the print labels screen.



If you want to go back and change something, you can click back on the red title bar to open that section. Make any changes then click on the red title bar to open Print Labels and complete the label print.

- To add return labels or to print return labels only:
 - 3. Click to select the appropriate round checkbox before printing.
 - 4. Click again to remove the dot and deselect it if you no longer want it.
- **To cancel the print completely (can only be done before the print labels button has been clicked):**
 - 5. Click the Cancel printing of labels link



If you print a ticket in error or wish to change the weight or destination of a ticket -Print a new ticket with the correct details and discard the incorrect ticket immediately. We will only bill a ticket that has been scanned.

- To print the labels:
 - 6. Click the green Print labels button.

Reprint Label

- Sometimes a label may not print (because, for example, the printer is turned off or unplugged). In most environments the print jobs are spooled, so the label will print when the printer issue is resolved.
- In the event that the label does not print you can reprint it from the Print History Report option.

Print	Histor	y Report Usage Repor	Pending M	anifest					C	BOOK A PICKUP
View	Print Hi	story								HELP
Ticket N	Number(s)		From Date		To Date		GENERATE REPO	RT		
	13 Jun 2008	1898240000062001AKL003HN	CP IT ONLINE SMARTXP	noemi	Marker	Grey Lynn	CPOLTP	\$4.53	No	+
+ RE	PRINT	DOWNLOAD ALL						1	23.	398 >

- 1. Click on the Manifests and Reports tab option. The Print History Report screen opens.
- 2. At the bottom of the page, click on the last page number (latest records show on the last page).
- 3. Find the record for the unprinted label in the list.
- 4. Click in the checkbox to the left of the record to select it.
- 5. Click the Reprint button.

•	18 Aug 2008	1898240001084501PLN003HN	CP IT ONLINE SMARTXP	Gerry	Gene	Palmerston North	CPOLTP			\$4.	.53	No		+
+ REI	PRINT	DOWNLOAD ALL						FIRST	<		395	396	397	398

A new label is printed. Note that the barcode number will be different to that shown in the record list, as each label print generates its own unique number.

Batch Labelling

Use *Batch labelling* to print labels for multiple receivers from your address list and/or groups, for example when you are doing a bulk mailout. You can also:

- 1. Add a new receiver to your address list and create a label for them all in one step, or
- 2. Create a label for a one time receiver without saving their details to your address list.
- 3. Add batch references to all the receivers in the list.
- 4. Select receivers from the list and save them as a new group.
- 5. Save the print run as a template for future use.







If you click away from Batch Labelling without completing the label print you will lose any data you have entered.

Step 1 - Address Details

Click here to see the section on how to select Sender Addresses.

Print labels for multiple receivers

- Choose defined groups of receivers (these must have been set up previously)
 - 1. Click the Select a group drop down arrow and click on the group name from the list.
 - 2. Repeat this action to add multiple groups to the list.



If you don't have any groups you can find the receivers individually and add them to the list, then if you want to you can save them as a group from here (see Save as new Group below).

To find receivers one by one, search on their Quickname (this is a name that can be assigned to them; you could use your ERP Debtor codes), Company, Town/City or a combination of all these fields. **All** is the default selection – bypass steps 1 and 2 if you want to use the default.

- 1. Click the Show Filter options link.
- 2. Select at least one option for searching.
- 3. Begin typing the receiver name in the 'Type to select a receiver' field. A drop down displays the results.
- 4. Click on the correct name.
- 5. Click the green Add button.

Continue as above until you have added all the receivers you need to print labels for.



You can add groups **and** individual receivers to the list. If a receiver is listed in more than one group they will only be displayed once as duplicate records are removed.

- To go to the section on how to add a new receiver whilst printing a label click here Print label for and add a new receiver
- To go to the section on how to add a one off receiver click here Print label for a one-off receiver

Add batch references to the list

You can add customer reference information, delivery instructions or Inventory notes as required.

- If information is the same for all receivers you enter it only once and apply it to everyone in the list.
 - 1. Click on the Apply batch references link.
 - 2. Type the data into any or all of the three fields.
 - 3. Click the Apply to all receivers button.

Add batch references	5
Batch References	<u>Close</u>
Customer Reference Delivery Instructions Handle with care Consignment Notes APPLY TO ALL RECEIVERS Cancel	

- When the information is different for each receiver, or applies to only a few receivers, you can do this one by one:
 - 4. Double click on the receiver's record line in the area under the column(s) named Customer reference, Delivery Instruction, or Inventory Details. A field opens where you can type the data.

	Add one-off references	
Customer Ref	Delivery Instruction	Item inventory Details
		Note for this customer only
NZ2-01005	Deliver to reception	

- Do this for each individual receiver as necessary.
- Click anywhere away from the field to close it.

Save as new group

If you have a mix of groups and/or receivers you have added individually and know you will be doing future deliveries to this same list of receivers you can add them as a new group. **Note**: If you have a one-off receiver in this list you cannot add them to the group (a one-off is temporary).

	Quickname	Company	Town/City
	Sweet heart	Sweet heart	Wellington
	Suzy	ReceiverCompany1	Napier
•	Jon Piece	ReceiverCompany2	AUCKLAND

- 1. Click in the checkbox to the left of the Quickname title. This will select all the receivers in the list.
- 2. To remove individuals just click in the checkbox to the left of their record to remove the tick.
- 3. When you have selected the records you want to add to the new group, click the Save as new group link.
- A window opens. Items marked * are mandatory.
 - 4. Type the name of your group.
 - 5. Type a description of the group (this will be helpful in the future to know why the group was added).
 - 6. Click the green Save button.
- When you have entered all your requirements
 - 7. Click the Proceed to printing button.

Step 2 - Shipment Details

- To see the section on shipment details click Step 2 Shipment Details
- Click this link to read about Select service and package
- To learn about custom packages click Add a custom package

Step 3 - Print Labels

From here you can create a template of this batch label print job which can be used again in the future. The benefit of this is that all the data – receivers, shipment details etc. are saved as part of the template, which means you do not have to reproduce the information in the future: you simply choose to print a template (see the section Print from Template) to replicate this print job. **Note**: you can only have a maximum of 20 templates.

- Click here to review Step 3 Print Labels to see the options available.
- To create a template and print labels:
 - 1. Click the Print and save template button.
 - 2. Give your template a name.
 - 3. Click the Continue to printing button.
- To print the labels:
 - 4. Click the green Print labels button.
- **To cancel the print completely (can only be done before the print labels button has been clicked):**
 - 5. Click the Cancel printing of labels link.



If you print a ticket in error or wish to change the weight or destination of a ticket -Print a new ticket with the correct details and discard the incorrect ticket immediately. We will only bill a ticket that has been scanned.

Print from Template

Any templates you have created can be accessed and loaded to the batch labelling function. The receiver(s), service and package types that were defined when the template was saved are replicated.



- 1. Click the menu option Print from template.
- 2. Click the drop down arrow to see the list of template names.
- 3. Click on the name of the template that you require.
- 4. Click the green Open button.
- The template is loaded to the batch labelling function and the screen opens at the Print Labels section.
- If nothing is to be changed:
 - 5. Click Print labels.



If you want to make any changes (e.g. add or remove receivers or packages) click on the red title bar to open that section. Make your changes and proceed to printing. If required you can print and save as a new template (to retain the modifications).

Delete template

To permanently delete a template that is no longer required:

- 1. Click the drop down arrow to see the list of template names.
- 2. Click on the name of the template that you require.
- 3. Click the Delete button.



You can create a maximum of **20 templates**. If the limit has been reached you must delete an existing template before a new one can be created.

Ensure you do this **prior** to creating the new batch labelling job that you want to make a template of, or the information entered in the job will be lost and you will have to re enter it.

Address Book

The address book is where you add, remove or edit all your receivers' details: company and contact names, contact details, groups they have been included in etc.

From here you can also access and manage the groups that you have defined: create new group(s), edit existing group(s) and add receiver(s) to a group.

Adding addresses



Functionality is the same:

- · Whether adding from Address book, Quick or Batch Labels, and
- Whether adding a new receiver or entering an address for a one-off receiver.

Address validation

- CourierPost must have at least a valid suburb or town in order to get your item delivered quickly and efficiently. Some suburb names that are in common use are not recognised by the local authorities or New Zealand Post and as such they may not appear in the Ticket-it search tools.
- In the street number and street name searches, you can use the % symbol to show all possible suburbs that match the street address in a particular city or area. For instance entering "30 High Street % Timaru" will identify that this address is in "Parkside" Timaru. You can type this with or without spaces:
 30 High Street%Tim
 30 High Street %Tim
 30 High Street % Tim
- The % sign also works when entering PO Box/Private Bag numbers. For example; I have entered the box number 234 and the drop down list is showing suburbs in the ABC range. To force it I can enter 234%Ma to get the suburbs matching the M's.
- If, in the suburb/town search, you cannot find the suburb that you need you should select a valid suburb that is close by. For instance a new suburb may not exist yet in our records but the adjacent suburb will.

Using the search fields

street number	Liniki athat Notifici No	
and name		
	Building Name	Type the street number: as
	Street No, Street Name, Suburb, Town/City.* TIP:Find the suburb by inserting % after the street and before the town/city.	you start typing the street name a drop down list will display matches. The
	151 Victoria S	more of the street name
	151 Victoria Street, Ashburton, Ashburton	you type, the more refined
	151 Victoria Street, Cambridge, Cambridge	the search results.
	151 Victoria Street, Dargaville, Dargaville	Use the scroll bar to move
	151 Victoria Street, Hamilton Central, Hamilton 🚽	down the list to see all the
	Customer Ref	results.
 Enter a valid PO Box or Private Bag number 	Add New Receiver Company * Quickname C Street Address PO Box / Private Bag # Please type PO Box or Private Bag Address.* 90105 Private Bag 90105, INVERCARGILL, INVERCARGILL PO Box 90105, VICTORIA STREET WEST, AUCKLAND Customer Ref	Start typing the Box or Bag number. Choose the correct address from the drop down list. You can use the % sign to help find a suburb

Enter a CMB	
address	Add New Receiver
	Company *
	Quickname
	Street Address PO Box / Private Bag #
	Please type PO Box or Private Bag Address *
	start typing the area
	Counter , MILFORD POSTSHOP, NORTH SHORE CITY
	CMB 1, MILFORD SOUND
	CMB 2, MILFORD SOUND
	Customer Ref
	1
Street number	
not found:	One Off Receiver
Step 1	
	Street Address C Private Ban or PO Box
	Building Name
	Street Name, Suburb, Town/City*
	TIP.Find the suburb by inserting % after the street and before the townicity.
	Click here if you can't find street number & name.
	Postcode If the street number
	Country New Zealand Cannot be found,
	ADD Cancel CICK HOLD
Step 2	
	A new field displays.
	Street No * 100 mandatory.
	Street Name, Suburb, Town/City. *
	TIP:Find the suburb by inserting % after the street and before the town/city. Enter the street name
	Prin and suburb to find a
	Prince Albert Road, Dunedin South, Dunedin Match. If What you want doesn't display
	Prince Albert Road, Saint Kilda, Dunedin try typing a % sign
	Prince Avenue, Mount Maunganui, Mount Maunganui after the street name.
	Prince Of Wales Drive, Tokaanu, RD 1, Turangi 👻
Street Name not	
found: Step 1	Street Address O PO Box / Private Bag #
	Building Name
	Street No * 12
	Street Name, Suburb, Town/City. *
	TIP.Find the suburb by inserting % after the street and before the town/city.
	Click here if you can't find street number & name. Rark
	Country * New Zealand
	Postcode Click here if the
	street name cannot
	be found

Step 2

ticket-itsupport@courierpost.co.nz Phone: 0800 783 783





Click the Back link (to the right of the search field) at any time to return to the original address search field type.

Address book functions

When you open the address book a list of current receivers is displayed.

			lick a colum sort by that plumn.	n title	Show sele	vs details o ected rece	of the iver	Н
Addres	ss Book					HELP	Receiver De	etails + EDIT
Searc	h or select as you type	1	GO Show Fi	lter Options	+ ADD N	EW RECEIVER	Quickname	TestQuick
	/						Company	Test CompanyNpad
Display	ing 1 - 10 records out of :	306					Address	
	Quickname 📃 🗭	Contact	Company	Town/City	Group(s)	Site Code(s)	1234	
	TestQuick	dsfgdfsgfds	Test CompanyNpad		None	189824	AHIPARA AHIPARA	
	sdafasfds	testcontact	testfromQuickLabel2		None	189824	Contact	dsfgdfsgfds
	ExportQuickname3000	ReceiverContact1	ReceiverCompany1	Auckland	Group 2	189824	Tel	54754675467547
	Bulk Receiver 1	ReceiverContact1	ReceiverCompany1	Auckland	None	189824	Site Codes	189824
	Bulk Receiver 2	ReceiverContact2	ReceiverCompany2	AUCKLAND	None	189824	Duplicate Re	cord

- Sort the list by clicking on the name of a column in the title bar, e.g. Company. The first click will sort in ascending alphabetical order; a second click will sort in descending order.
- To select from the list:
 - 1. Click on the record of the receiver you want. The line will be highlighted in yellow and the receiver details displayed in the panel on the right hand side of the screen.
- Alternatively, search on their Quickname (this is a name that can be assigned to them; you could use your ERP Debtor codes), Company, Town/City or a combination of all these fields. All is the default selection - bypass steps 2 and 3 if you want to use the default.
 - 2. Click the Show Filter options link

 - Select at least one option for searching.
 Begin typing the receiver name in the search field. A drop down displays the results.
 - 5. Click on the correct name.
 - 6. Click the green Go button.

The receiver's record is displayed.

Edit receiver record

1. Click the Edit button on the panel.

	Edit Receiver				
	Company*	ReceiverCompany1	Contact*	ReceiverContact1	
Quickname can be	Quickname	Suzy	Phone Number*	9704333305	
any alphanumeric	Street Address (℃ PO Box / Private Bag #	Mobile	9704333305	
code that you	UnitNo/Apt No/Bid No		Email	test@test.com	1
choose (e.g. Name.	Building Name		Fax	12341234123	Enter email and
FRP Code).	1.249.002.000.000.0	1	Group Names	Craftsman Plumber, newone	click the checkbox if
	Street No, Street Name,	Suburb, Town/City.*		(met)	you want this
	TP Find the suburb by inse 14 Fannin Street, Bay	ring % after the street and before the lownshity. / View, Napier	Site Code(s)	189824 (soir)	receiver to get an email notification
	Click here if you can't find	New Zealand	Confirmation Emails	C Yes @ No	when your parcel is
	Postcode	4104			picked up and on its
	Delivery Instructions	outside delivery instr	SAVE & DELETE	Cancel	way.
	Customer Ref	inside out cust ref			I

- Fields marked * are mandatory.
 - 2. Click in the field(s) to be edited and enter the updated data.
- To add or remove groups:
 - 3. Click the grey Edit button in the group names section.



- 4. Click the checkbox next to a group name to add or remove the tick, thereby adding or removing the receiver from the group.
- To save changes to the record:
 - 5. Click the Save button.
- To delete from your address book:
 - 6. Click the Delete button on the Edit screen.
- Once you have edited the record you are back in the list with only the receiver's record displaying. To return to the full list:
 - 7. Click the Clear search link

(If you deleted the record you will automatically be returned to the full list).

- **To delete a receiver from the list without editing the record:**
 - 8. Find the receiver in the Address book list.
 - 9. Click the checkbox on the left of the record to select it.
 - 10. Click the Delete link at the bottom right of the records list.

Add new receiver

1. Click on the yellow Add New Receiver button.

Fields marked * are mandatory.

- 2. Complete at least these mandatory fields.
- 3. Click the round checkbox to indicate whether the address is a street address or private bag/PO box.
- 4. Specify the Unit/Apt/Bld number by typing, for example, 'Unit 14' in the field. Only data you enter will print and '14' is less helpful than 'Unit 14'.
- 5. Enter a building name if one exists, e.g. 'Mount Field House'.
- 6. Enter the street number and any letter together, without spaces, e.g. 324A Sandringham Road or 105B Great North Road. See Adding addresses for important notes.
- 7. Enter delivery instructions or customer reference
- 8. Enter the contact name
- 9. Enter the phone number
- Add a valid email address if you want this customer to receive confirmation emails that your parcel has been collected. You must also click in the round radio button to indicate emails are required.

If you want to assign this receiver to a group or groups you can do so here.

- 10. Click the Edit button below Group Names.
- 11. Click the checkbox next to the group names in the window that opens.
- To associate this receiver with certain sites only click the Edit button below Site Codes. Only the site codes selected will be able to use this receiver address.

<u>Close</u>

- 12. Click the check box next to the site code or codes in the window that opens.
- 13. Click the Save button.
- 14. Click Save when you have finished entering data for this receiver. They will be added to your address list.



Quickname is optional. It is used like a nickname (you could use your ERP Debtor codes), and is a fast way for you to search for and locate a company (receiver). If you do not enter a Quickname the system will generate one using the company name.

Add to a group

You can add one or more receivers to a group, at one time.

1. Click the checkbox beside each required receiver's record (if you want to select all the receivers on this page of the address book, click the checkbox to the left of Quickname in the title line. Repeat for receivers on other pages of the address book).

	Suzy	ReceiverContact1	ReceiverCompany1	Napier	Craftsman Plumber, newone	189824
	Jon Piece	ReceiverContact2	ReceiverCompany2	AUCKLAND	None	189824
•	Natalie Wood	ReceiverContact3	ReceiverCompany3	Lower Hutt	None	189824
•	Andrew Smith	ReceiverContact4	ReceiverCompany4	Dunedin	None	189824
•	ExportQuickname3001	ReceiverContact2	ReceiverCompany2	AUCKLAND	None	189824
	Execute	Harry	Execute		None	189824

- When all the receivers that you want to put into a group have been selected:
 - 2. Click the Add to group button.

The window opens:

dd to Group	
	A team inside
	andrew 20
	Group 2
	wines
AVE Cancel	

- 3. Click the checkbox beside the group or groups that you want to add these receivers to.
- 4. Click the Save button when finished.



As you add to groups the receivers' record updates to reflect the changes. If you don't see the group name added to the record you should refresh the page (CTRL + F5 forces a refresh).

Duplicate a record

If a receiver has more than one delivery point for their site, for example, you can choose to duplicate the record and modify the delivery instructions.

The Quickname, company name, address or contact <u>must</u> be slightly different for the record to save, so a valid change might be to add a character to the Quickname (e.g. BC9008, BC9008a, and BC9008b).



- 1. Find the receiver from the address book.
- 2. On the right hand receiver details panel, click the Duplicate record link.
- 3. Add or modify the data.
- 4. Click Save.

Manage groups

Groups are where you can define a number of receivers to whom your company sends the same package(s), at the same time. They are useful for bulk mailout scenarios.

Use this function to display all the groups used by your business; edit the groups, create new groups or add receivers to an existing group. You can also delete groups that are no longer required or remove receiver(s) from a group.

				Displa name	ays only the first is in the group	50			
Manag	e Groups				HEEP	Group Details	+ EDIT		
Search	or select as you t	уре	SEARCH		+ CREATE NEW GROUP	Name newone			
						List of Receivers (First	50)		
Displayi	ng 1 - 10 records ou	it of 13				Suzy	-		
	Group Name	Description	Records	Created	Modified	Sweet heart			
	Pick n Mix	Shoe types	2	19 Jun 2008	19 Jun 2008	 TestNews Test Recv 			
	Hip Hop99	Brochures	6	19 Jun 2008	19 Jun 2008	+ ADD TO GROUP			
	sounds like	noise	4	19 Jun 2008	19 Jun 2008	Remove From Group	1	I	Scroll to cap all the list
	Cita	Homeware	7	26 Jun 2008	26 Jun 2008		L.	_	of 50 names.
	vino	wine lovers	2	26 Jun 2008	26 Jun 2008				or oo hamoo.
	Craftsman Plumber	Plumers	3	26 Jun 2008	26 Jun 2008				
	KP2 Group	Kellys group 0707	4	07 Jul 2008	07 Jul 2008				

There is no limit to the number of receivers in a group, or to the number of groups you can create.

Edit an existing group

- 1. Click in the search field and type the group name.
- 2. Click the Search button, or
- 3. Click on the group name from the list.

The group details display in the right hand panel. Use the scroll bar to see the first 50 of the receivers in this group (to see everyone in the group click either add to or remove from group).

- 4. Click Edit to open the group details.
- 5. Change the name or description.
- 6. Click Save.

Create a new group

- 1. Click the Create new group button.
- 2. Enter group name and/or description.
- 3. Click Save.

Add to group

Add receivers one at a time to a group.

Manag	je Groups				HELP	Group Details + EDIT
Search	n or select as you ty	уре	SEARCH		+ CREATE NEW GROUP	Name Craftsman Plumber
						List of Receivers (First 50)
Displayi	ing 1 - 10 records ou	t of 13				Suzy
	Group Name	Description	Records	Created	Modified	HP
	Pick n Mix	Shoe types	2	19 Jun 2008	19 Jun 2008	 Captain Fantastic
	Hip Hop99	Brochures	6	19 Jun 2008	19 Jun 2008	+ ADD TO GROUP
	sounds like	noise	4	19 Jun 2008	19 Jun 2008	Remove From Group
	Cita	Homeware	7	26 Jun 2008	26 Jun 2008	
	vino	wine lovers	2	26 Jun 2008	26 Jun 2008	
	Craftsman Plumber	Plumers	3	26 Jun 2008	26 Jun 2008	

- 1. Select your group from the list.
- 2. The group details display in the right hand panel.
- 3. Click Add to group from the panel.

	Add	ta Group					BILL	Group Details + EDIT GROU
ck checkbox to	Boo Show Filter Options						Name: Group 2 Description: assess	
once found	Displa	aying 1 - 1 record	ds out of 1				The Posts	Your group currently has 3 receive
		Quickname	Contact	Company	Town/City	Group(a)	(s)	m u.
	M	betty	bettycourierpost.co.nz	Aunt Betty	Christchurch	A team inside, wines	109024	Remove From Group

- 4. Find the receiver using the search field.
- 5. Click Go to put in the list.
- 6. Click in the checkbox to select.
- 7. Click the Add to group button.
- 8. Click the Back to group management link to see the full list again.



You will not find a receiver name if they are already in the group.

Remove from group

- Select your group from the list.
 Click the Remove from group link on the right hand panel.



The list of all receivers in the group displays.

Remo Sear	ove From Grou	p you type	GO	Show Filter Options		HELP	Group Details + EDIT GROU Name: Group 2
Displa	ying 1 - 2 record:	s out of 2					Description: aaaaaa Your group currently has 2 receive
	Quickname	Contact	Company	Town/City	Group(s)	Site Code (s)	in it.
	testname	4354gfdf	TestPobox	WAIAU	Group 2, A team inside	189824	+ ADD TO GROUP
•	Sweet heart	ian	Sweet heart	Wellington	Group 2, A team inside, wines	189824	
REMOY	E FROM GROUP				Back to G	1 roup Management	

- 4. Click the checkboxes to select the receiver(s) to be removed.
- 5. Click the Remove from group button. Answer the prompt
- 6. Click the Back to group management link to see the full list of groups again.

Delete group

- 1. Click the checkbox of the group to be deleted.
- 2. Click the Delete group button.

Bulk upload

Use this function to upload a tab delimited .txt file containing addresses. You can edit receiver addresses at any time after the upload.

File format

The field name must be in the first row and data, formatted as defined, entered in each column. In the examples below, the data has been entered in an Excel spreadsheet, which was saved as a tab delimited .txt file for the upload.



An example Excel file is available from the Help Centre link. Use this to enter your data in the correct format, just delete the example rows. When all the data is entered, save as a **tab delimited .txt file** ready to be uploaded.

Field Name	Status	Field length &	Description
Description Optical Name	Ontinual	character specs	Now side as a factly south as a Oscillar
ReceiverQuickName	Optional	SU Chars AlphaNumeric/Special chars allowed	customer account number/ERP debtors' code, for
ReceiverCustomerReference	Optional	35 Chars AlphaNumeric	Printed on every label.
ReceiverDeliveryInstructions	Optional	50 Chars AlphaNumeric	Printed on every label.
ReceiverContact	Mandatory	35 Chars Alpha	Contact name. If you don't have one use Reception, Store, Warehouse or similar. Printed on every label.
ReceiverCompany	Mandatory	35 Chars AlphaNumeric/Special chars allowed	Company name, or name of customer e.g. Mr Wilson.
ReceiverAddress1	Optional	35 Chars AlphaNumeric Example .,\/	Indicate whether unit, flat, shop or building and number (Unit 4, Shop 33C).
		(Dot,Comma,Back slash,Forward slash,hyphen,Under-	OR enter PO Box / Private Bag number (e.g. PO Box 356).
ReceiverAddress2	Optional	35 Chars AlphaNumeric Example .,\/ (Dot,Comma,Back slash,Forward slash,hyphen,Under- score)	Building name, mall name, industrial estate name etc.
ReceiverAddress3	Mandatory	35 Chars AlphaNumeric Example .,\/ (Dot,Comma,Back slash,Forward slash,hyphen,Under- score)	Valid street number & name. No spaces between letters and numbers, e.g. 104C Wilson Street. Street/Road/Avenue etc in full. For PO Box/Private Bag Number please enter the PO Box SUBURB in this field.
ReceiverAddressType	Mandatory	1 Char Numeric	1 = Street address 2 = PO Box or Private bag
ReceiverAddressTown	Mandatory	35 Chars Alpha	Town or city name.
ReceiverAddressSuburb	Mandatory*	35 Chars Alpha	Suburb name.
			* Not mandatory for PO Box/Private Bag Number – you can leave empty.
ReceiverRuralDeliveryAddress	Optional Unless RD	35 Chars AlphaNumeric	Use RD # to indicate the rural zone, e.g. RD 6
ReceiverAddressPostalCode	Mandatory	4 Chars Numeric	Valid NZ Post postcode.
ReceiverAddressPhone	Mandatory*	25 Chars Numeric/Some special chars Example () - (brackets, dash)	Include area code. * If no known number enter any numeric, e.g. 0, 123 Printed on all labels
ReceiverAddressMobile	Optional	25 Chars Numeric/Some special chars Example () - (brackets, dash)	Enter a valid mobile number.
ReceiverAddressEmail	Optional	250 Chars AlphaNumeric email format	To have confirmation emails sent to your customer when the parcel is scanned on pickup.
ReceiverAddressFax	Optional	25 Chars Numeric/Some special chars Example () - (brackets, dash)	Include area code.
SendConfirmationEmails	Mandatory	FALSE/TRUE	Indicate the status – enter TRUE if you have entered an email address for a receiver, FALSE if you have not.

Addresses that have been bulk uploaded can be edited from the Address book in Ticket-it to update any data in a particular receiver's address.

Example Part 1:

ReceiverQuickName	ReceiverCustomerReference	ReceiverDeliveryInstructions	ReceiverContact	ReceiverCompany	ReceiverAddress1
ECL		Before 5pm	Reception	ECL Ltd	4th Floor
CP Tauranga			Reception	CourierPost - Tauranga	
CP Auckland			First Floor Reception	CourierPost Auckland	
987061		Ground Floor	Accounts	CourierPost - Wanganui	
		Rear Dock	Stores	CourierPost - Carbine	
Example		After 10am	Warehouse	Example Company's Name & Bar	

Example Part 2:

ReceiverAddress1	ReceiverAddress2	ReceiverAddress3	ReceiverAddressType	ReceiverAddressTown	ReceiverAddressSuburb	ReceiverRuralDeliveryAddress
4th Floor		151 Victoria Street West	1	Auckland	Auckland Central	
	Central trades Park	65 Chapel Street	1	Tauranga	Taruanga	
PO Box 111		ALBANY VILLAGE	2	North Shore City		
		62 Wilson Street	1	Wanganui	Wanganui Central	
		43 Carbine Road	1	Auckland	Mount Wellington	
Box 356		GREYMOUTH	2	GREYMOUTH		

Example Part 3:

ReceiverAddressPhone	ReceiverAddressMobile	ReceiverAddressEmail	ReceiverAddressFax	SendConfirmationEmails
3670000		ticket-itsupport@courierpost.co.nz	(09) 367 9805	TRUE
0	275559898			FALSE
(09) 3679999				FALSE
0		Post@courierpost.co.nz		TRUE
0				FALSE
555-1767	021-555-478	example@test.com		TRUE
٦ 5	ReceiverAddressPhone 3670000 09) 3679999 0 0 55-1767	ReceiverAddressPhone ReceiverAddressMobile 3670000 09) 3679999 0 0 55-1767 021-555-478	ReceiverAddressPhone ReceiverAddressMobile ReceiverAddressEmail 3670000 ticket-itsupport@courierpost.co.nz 0 275559898 09) 3679999 Post@courierpost.co.nz 0 Post@courierpost.co.nz 0 275559898 0 Post@courierpost.co.nz 0 200 0 Post@courierpost.co.nz 0 21-555-478 example@test.com	ReceiverAddressPhone ReceiverAddressMobile ReceiverAddressEmail ReceiverAddressFax 3670000 ticket-itsupport@courierpost.co.nz (09) 367 9805 09) 3679999 275559898 0 Post@courierpost.co.nz (09) 367 9805 0 Post@courierpost.co.nz 0 201-555-478 example@test.com

File upload

- 1. Use the Browse button to locate the file.
- 2. Click the checkbox to select the Site Code(s) these receivers will belong to. Sites whose codes are not selected **will not** be able to see the receiver address.

Bulk Upload			
Upload a .txt (tab delimited) file contai Please note that any Group or Site Co	ing your list of addresses. These must be fo le entries in the file will not be uploaded to th	matted according to the CourierPost data structure which can be viewed in the h system. Please use this screen to define any Group or Site Code settings.	elp section.
File to Upload			
Select a file to upload	Browse.	Help	
Select the Site Code(s) that these Receivers will belong to	189824		
Optional Information			
Customer Reference			
Delivery Instructions			
 Add to existing group Create a group from this batch 			
UPLOAD			

Optional information

- Enter any optional information if required BUT be aware that it will be applied to each of the uploaded records and will **overwrite** any existing data in these fields in the file.
 - 1. Customer Reference detail
 - 2. Delivery Instructions
- If you want all the receivers in this upload file to be added to a group or set of groups, you can specify this here.
 - 3. Click the round checkbox to select either of the following options:
 - Add to existing group
 - I. Select Group(s) to add to these receivers click the appropriate checkbox beside each group name.

Phone: 0800 783 783	ticket-itsupport@courierpost.co.nz
Add to existing group Select Group(s) to add this bulk upload to these receivers	 A team inside andrew 20 Group 2
 Create a group for these receivers Enter group name. Enter a group description. 	
Create a group from this batch	
Group Name *	
Group Description	

4. Click the Upload button to commence the bulk upload.

A successful upload will display the message "Successfully inserted # rows"



- a. If the file format is incorrect you will see a message "The file you are trying to upload is not in correct format, please review details in Help for more information".
- b. If the file has in excess of 50 errors then the whole file upload will be rejected and you get a message "This file exceeds the maximum error count, please amend the file and try again."
- Review the file structure information at the beginning of this section, amend your file and recommence the bulk upload.

Bulk Download

You can extract the data from your Address Book and download into either an Excel .xls file or a tab delimited .txt file. This enables you to manipulate your address data off line, and then upload again when any modifications or corrections have been made.

File Format

Field Name	Status	Field length & Character specs
Row	Ignored	
ReceiverPK	Ignored	
ReceiverCustomerReference	Optional	35 Chars
		AlphaNumeric
ReceiverQuickName	Optional	50 Chars
		AlphaNumeric/Special chars allowed
ReceiverCompany	Mandatory	35 Chars
		AlphaNumeric/Special chars allowed
ReceiverAddress1	Optional	35 Chars
		AlphaNumeric
		Example .,\/ (Dot,Comma,Back slash,Forward
		slash,hyphen,Under-score)
ReceiverAddress2	Optional	35 Chars
		AlphaNumeric
		Example .,/ (Dot, Comma, Back slash, Forward
		slash,hyphen,Under-score)
ReceiverAddress3	Mandatory	35 Chars
		AlphaNumeric
		Example .,\/ (Dot,Comma,Back slash,Forward
		slash,hyphen,Under-score)
ReceiverAddressType	Mandatory	1 Char
		Numeric
ReceiverAddressTown	Mandatory	35 Chars
		Alpha
ReceiverAddressSuburb	Mandatory	35 Chars
		Alpha
ReceiverRuralDeliveryAddress	Optional	35 Chars
DeserverConstant		
ReceiverContact	Mandatory	35 Chars
Pagaivar Address Phone	Mandatan/*	Alpha 25 Choro
ReceiverAddressFrione	Manualory	20 Cildis Numeric/Some special chars Example () - (brackets
		dash)
ReceiverAddressMobile	Ontional	25 Chars
ReceiverAddressiviobile	optional	Numeric/Some special chars Example () - (brackets
		dash)
ReceiverAddressFax	Optional	25 Chars
	ep lional	Numeric/Some special chars Example () - (brackets.
		dash)
ReceiverAddressPostalCode	Optional	4 Chars
		Numeric
ReceiverDeliveryInstructions	Optional	50 Chars
-	-	AlphaNumeric
SendConfirmationEmails	Optional	True/False
Groups	Ignored	
ReceiverSiteIDs	Ignored	

Example Part 1:

	A	В	С	D	E	F	G	Н
1	Row	ReceiverPK	ReceiverCustomerReference	ReceiverQuickName	ReceiverCompany	ReceiverAddress1	ReceiverAddress2	ReceiverAddress3
2	97	29444		Bally	Ballywicks			321 Main North Road
З	98	29948		Bargain Bikes	Bargain Bikes			9 Louvain Place
4	100	29451		BEACHVETS	BEACHVETS			53 Wilson Road
5	101	30400		bob	Bob's Wines			61 Fairy Springs Road
6	102	29443		Bros	Brosnan Bros			657 Main Street
7	103	29912		brosnan bikes	Brosnan Bikes			123 West End Road
8	105	29452		BRUNG EXPRESS LTD	BRUNO EXPRESS LTC			347 Turuturu Road

Example Part 2:

		J	K	L	M	N
1	ReceiverAdcressType	ReceiverAddressTown	ReceiverAdcressSuburb	ReceiverRuralDeliveryAddress	ReceiverContact	ReceiverAddressPhone
2	1	Waitara	Motunui	RD 43	Wallice	120456
3	1	North Shore City	Greenhthe		Brett	1
4	1	Waihi Beach	Waihi Beach		Reception	07 863 7387
5	1	Rotorua	Fairy Springs		а	U
6	1	Palmerston North	Palmerston North		Pierce	0
7	1	Auckland	Westmare		Pers	1
8	1	Hawera	Hawera	RD 14	Reception	07 863 7387

Example Part 3:

	0	Р	Q	R	S	Т
1	ReceiverAddressMobile	ReceiverAddressEmail	ReceiverAddressFax	ReceiverAddressPostalCode	ReceiverDelivery Instructions	SendConfirmationEmails
2				4383		FALSE
3				632		FALSE
4				3611		FALSE
5				3015		FALSE
6				4414		FALSE
7				1022		FALSE
8				4674		FALSE
~				1011		111202

Example Part 4:

	U	V			
1	Groups	Receiver SitelDs			
2	OT_, rel16E	189824			
3	rel16B	189824, 112750			
4	OT_, rel16E	189824			
5		189824			
6	OT_, rel16E	189824			
7	rel16B	189824, 112750			
8	OT_, rel16E	183824			

File Download

1. Choose Address Book from the menu.

CONCEPTS	Reception	CONCEPTS	Matamata	rel16B	189824
DAPPER DOGS	Reception	DAPPER DOGS	Richmond	OTL	189824
DOGS R US	Reception	DOGS R US	Lower Hutt	None	189824

2. Click the download all button at the bottom of the open Address book.



3. Click the appropriate download button for the file type you want.

ile Dowr	nload	X
?	Some files can H looks suspicious save this file.	narm your computer. If the file information below , or you do not fully trust the source, do not open or
	File name:	Receivers.xls
	File type:	Microsoft Excel Worksheet
	From:	ticket-it.courierpost.co.nz
	Would you like (o open the file or save it to your computer?
	Open	Save Cancel More Info
	🔽 Always ask	before opening this type of file

- 4. Choose save and follow the usual steps to find a location to save the file to.
- Remember to convert the file back to a tab delimited .txt file prior to uploading the modified data.

Administration

The administration module is where site users are managed. User preferences for this login name can be modified, new or existing users added or modified and the user types are defined. Addresses for your company are defined under the Sender Addresses option.

Not every user will have access to the full administration functions.

User preferences

This displays the defaults and details for the current user (i.e. the one you logged in as). You can change data such as your password, the default page to display on login and details such as address, contact details etc. Fields marked * are mandatory.

Isemane/Email First Name Aurent Password * Last Name Company Name Address 1 * Address 2 SavE SavE SavE SavE SavE SavE SavE Sav	ogin Preferences		Your Details	
Current Password * Lest Hame New Password * Company Name Company Name Company Name Address 1 * Address 1 * Address 3 Default Label Printer Town/Chy * Zebra LP2844-Z Suburb * Default Printer Page Quick Labelling Country Persode Default Ste Code 189824 Post-it Save	Username/Email		First Name	Sharron
New Password * Contrain New Pa	Current Password *		Last Name	Faux
Continn New Password * Company Name Company	New Password *			50
Address 1* Address 1* Address 2 User Default Label Pinter Town/Chy * Toket Courtry Default Pinter Page Default Pinter Courtry Default Site Code 189824 Default Site Code 189824 Default Sender Address Site Default Sender 189824 Post-it Save	Confirm New Password *		Company Name *	ECL
Address 2 Juser Default Label Pinter Zebra LP2844-Z Default Pinter Page Size Default Pinter Page Default Site Code 169824 Default Site Code Site Default Sender Address Site 198924 Post-it SAVE	SAVE		Address 1 *	151 Victoria St West
User Defaults Address 3 Default Label Pinter Town/CRV* Zebra LP2844-Z Suburb * Default Pinter Page Size Ticket Default Pinter Page Quick Labelling Default Ste Code 189824 Default Sender Address Site Default Sender Code Address Mobile 198824 Post-it Save			Address 2	
Default Label Printer Town/Chy * Suburb * Suburb * Default Printer Page Size Ticket Default Printer Page Quick Labelling Default Site Code 1189824 Default Sender Address Site Default Sender Country Phone Code Address Mobile 189824 Post-it SAVE	User Defaults		Address 3	
Zebra LP2844-Z Suburb * Default Printer Page Size Ticket • Country Default Page Quick Labelling • Postoode Default Site Code 199824 • Postoode Default Sender Address Site Default Sender Code Address Mobile 199824 Post-it Save	Default Label Printer		Town/City *	Auckland
Default Printer Page Size Ticket Country Default Page Quick Labelling Postcode Default Sender Address Site Default Sender Code Address Mobile 198924 Post-it Save	Zebra LP2844-Z	V	Suburb *	CBD AKL
Default Ste Code 199524 Default Ste Code 199524 Default Sender Address Site Default Sender Address Mobile 198824 198824 198824 Save	Default Printer Page Size	Ticket 💌	Country	New Zealand
Default Ste Code 199824	Default Page	Quick Labelling	Postcode	Postcode Finder
Default Sender Address Site Default Sender Phone Phone Address Mobile 188024 Post-it SAVE	Default Site Code	189824 💌		
Code Address Mobile 189824 Post-it Save	Default Sender Address	Site Default Sender	Phone	99634
189824 Post-it		Code Address	Mobile	
		189824 Post-it	SAVE	

• The page is divided into three sections, each of which has its own Save button:

- Login details User defaults Your details
- 1. Click in the field you want to modify or update in any of the three sections.
- 2. Click the Save button for that section.

Default printer setup

Setting a default printer in this section means the print dialogue window will not pop up every time you print a label.

- If you have installed ActiveX then you can select your default label printer and the default printer page size from the drop down fields.
- If you don't have ActiveX installed then these fields will not display any data.



If you log in from a PC other than one at your site you will need to reset the default printer to one that is available from the current PC.



User Management

This is where you can access user lists and user types. The user list displays all current users defined for the system while user types list all the types of access, e.g. Administrator, labeller, public user, tracer, reporter etc. New users or user types can be added or existing ones modified (in some instances) or deleted.

User list

Sort the list by clicking on the name of a column in the title bar, e.g. Company. The first click will sort in ascending alphabetical order; a second click will sort in descending order.

User	List User Types					HEL	User Details + EDIT
Туре	to select a User		60	Show Filter Op	tions + At	DD NEW USER	User: Sammy Davis
Displa	aying 1 - 10 records ou	it of 34					Username/Email: test@test.com
	User	Site Code(s)	Company	Town/City	User Type	Status	
	Marker Admin	189824	Marker	Auckland	ECL Admin	Active	5ite Code(s): 189824
	Customer Admin	189824	Marker	Auckland	Administrator	InActive	Details
	Sharleen McKinnon	189824	Marker	Auckland	ECL Admin	Active	23 Wellesly Street Auckland
	Sarvesh c	189824	Marker (Subsidiary) Ltd	Auckland	Administrator	InActive	Auckland CBD
	Nivino Gold Shoes	189824	Marker Inside	Auckland	Customer/Tracer	Active	

Search on Quickname (this is a name that can be assigned to them; you could use your ERP Debtor codes), Company, Town/City or a combination of all these fields. **All** is the default selection – bypass steps1 and 2 if you want to use the default.

- 1. Click the Show Filter options link
- 2. Select at least one option for searching.
- 3. Begin typing the user name in the search field. A drop down displays the results.
- 4. Click on the correct name.
- 5. Click the green Go button.

The user's record is displayed.

	User Information			
	First Name			Must be a unique
	Last None			email address
	Username/Email *		-	
	Password *	Confirm	· [1
	Company Name *			
	🖲 Street Address 🕐 PO B	ac /Privite Bog #		
	UntNo/Agt No/Bid No		_	Address is validated and
	Building Nome			can be found from a drop
	Street No, Street Name, Suburb, Town/City.*	Type to select address details.		down list as you enter it.
	TP Find the suburb by inserting %	6 after the street and behine the townlotly		
	Click here if you can't find street	number.		
	Postcode			
	Country	Hew Zealand		
	Phone			
	Mukile			Click all site codes
				that are relevant for
Select the site this	Site Code(4) *	Site Code Default Sender Address R 189824 CP IT ONLINE SMAR	TXPRESS TEST	this user.
generates labels	Default Site Code*	189824 -		
for.	User Type *	Administrator	_	Defines what
	Detaul Page*	Quick Labelling		this user can do
	Orose Access	Affe Oroup	4	in Ticket-it.
Sets the page that		C2A	-	
Ticket-it opens to.	This will restrict the user on the groups that the user has access	lended track & trace page. The user will only be to	able to consuct track & trace on rec	etvers reliated to the
	SAVE Cancel			

Edit user record

- 1. Click on the record to activate it. The User details panel on the right hand side of the screen will show the current user.
- 2. Click the Edit button on the panel. The record is opened.
- Fields marked * are mandatory.
 - 3. Click in the field(s) to be edited and enter the updated data.
- **To save changes to the record:**
 - 4. Click the Save button.

Once you have edited the record you are back in the list with only the user's record displaying.

- To return to the full list:
 - 5. Click the Clear search link

Activate or inactivate a user

You cannot delete a user from the list; however you can mark them as 'inactive' which means they are unable to login until they have been activated again. You can inactivate a user at any time (you might do that if they are going to be away from work for a long period of time, or if they you have set them up as a user even though they haven't started working for the company yet).

User Li	i st User Types					HELP
Type to	o select a User		G	5how Filter Op	tions + AD	D NEW USER
Displayi	ng 1 - 10 records out o	f 34				
	User	Site Code (s)	Company	Town/City	User Type	Status
	Marker Admin	189824	Marker	Auckland	ECL Admin	Active
	Customer Admin	189824	Marker	Auckland	Administrator	InActive
	Sharleen McKinnon	189824	Marker	Auckland	ECL Admin	Active
	Sarvesh c	189824	Marker (Subsidiary) Ltd	Auckland	Administrator	InActive
	Nivino Gold Shoes	189824	Marker Inside	Auckland	Customer/Tracer	Active
	Sammy Davis	189824	Marker (Northland) Ltd	Auckland	Labeller	InActive
× SET #	AS IN-ACTIVE					1234

- The user's status is displayed on their record.
 - 1. Find the user or users you want to set as inactive.
 - 2. Click the checkbox to select them.
 - 3. Click the set as inactive button at the bottom of the records list.
- Answer the prompts to confirm your action.
- To make a user active:
 - 4. Find and highlight the user you want to activate.
 - 5. Click the Edit button from the right hand user details panel.
 - 6. Click the Set as active button at the bottom right of the screen.
- Answer the prompts to confirm your action.

Add a new user

Adding a new user involves specifying not only their name, username and password and contact details, but also information that defines the site they are working from, what user type they are and the default page they will log into.

	User Information			
	First Name			Must be a unique
	Last Name			email address
	Username/Email *		*	
	Password*	Cont	im.	
	Company Name *			
	C Street Address C PO 5	sc/Privite Bog #		
	UntNo/Agt No/Bit No			Address is validated and
	Building Nome			can be found from a drop
	Street No, Street Name, Suburb, Town/City.*	Type to select address details.		down list as you enter it.
	TIP Find the subacts by inserting %	after the street and before the townloty		
	Click here if you can't find street	number.		
	Postcode			
	Country	Hew Zealand		
	Phone			
	Mobile			Click all site codes
				that are relevant for
Select the site this	Site Code(s) *	Site Code Default Sender Addre	RTXPRESS TEST	this user.
generates labels	Default Site Code*	189824 -		
for.	User Type *	Administrator	_	Defines what
	Detault Page*	Quick Labelling		this user can do
	Group Access	Alfe Oroup	4	in Ticket-it.
Sets the page that		Cita	-	
Ticket-it opens to.	This will restrict the user on the tigroups that the user has access	inded track & trace page. The user will only to,	be able to constact track & trace of	n receivers reliated to the
	SAVE Cancel			

- New users are marked at active, which means they can use the system immediately. If you don't want this user to be activated when they are added then you will have to set as inactive now and activate later when you are ready (see above).
- Fields marked * are mandatory.
 - 1. Click the Add new user button.
 - 2. Enter at least the mandatory fields.
- The email address must be unique. It will be the user's login username and is where their confirmation email is sent.
 - 3. Click the checkboxes to set the site codes this user has access to.
 - 4. Select the default site code. This is the one the user normally prints labels for.
 - 5. Select the user type for this login. This determines what the user has access to and can do in Ticket-it.
 - 6. Select the default page for this user. It will display when they log in.
 - 7. Set the group access (see note* below).
 - 8. Click the Save button when everything has been completed.

Once you click save an email is automatically sent to the new user. This contains a link to Ticketit, their username and their initial password.



*This will restrict the user on the limited track & trace page. They will only be able to conduct track & trace on receivers related to the groups that they have access to.

User types

User types are assigned permission levels that define what parts of Ticket-it each type can access. Users will only see the options that their user type has permission to use. An administrator can search for existing, or set up new user types, from this function.

- There are some default user types already defined.
 - 1. Click in the search field and type the user type name.
 - 2. Click the green Go button, OR
 - 3. Click on the record on the list.

The details display in the right hand panel, with the permissions listed.

You can only edit the user types that you define – you can't edit the default ones.



There is only one super user type allowed per site. The super user is the owner of the Ticket-it account and is created by us when we add your company to Ticket-it. They are the person with whom we make any contact for issues relating to Ticket-it.

If you ever need to change your designated super user please contact customer support on 0800 783 783 and log a change request.

Add new user type

- 1. Click the Add new user type button.
- 2. Enter a user type name and a meaningful description

Add/Edit User Types	
User Type Name eg.Basic User eg.Basic User Description TestType Desc	
Administration Permissions	Ticket-It Permissions
Sender Addresses	Address Book
Sender are kept and referenced from the Sender Address book Add/Edit/Delete Sender Addresses View Sender Addresses Data Management This user type will have permission to do the following within the Administration area of your account Add/Edit/Delete Users & User Types View Existing Users & User Types	The addressbook is where all receivers and groups of receivers available to the user are accessed Addredat/Delete Receivers & Groups View address book & groups Labels Addredat Address in Labeling Section Prepare Labels Addredat Address in Labeling Section Prepare Labels Manifests & Reports Manifests View User Activity Report Track A Trace Move user type to search tickets using the Track 'h' Trace tool Linited Track & Trace Access

- Use checkboxes to select an option.
- Putting a tick in any checkbox will give this user type permission to access that function.
 - 3. Click the Save button when you have finished defining the user type permissions.

Delete user type

- You can only delete types that do not have users allocated to them. To delete a type that has users allocated you will first have to edit the users and assign them as a different type.
 - 1. Search for the user type name, or click the checkbox to the left of the user type record from the list.
 - 2. Click the Delete button.

Sender Addresses

Every site ID has a frequent address attached to it. This is allocated during initial set up and is generated from the company TPID. Use this function to create a new user address to be the default that you want printed on labels, or simply maintain other company addresses which you may print labels for. They display on the label so your receiver(s) know who sent them the package(s).

If your company is located across multiple sites and you centrally manage label printing, you need to include **all** relevant company addresses in this list.

						Not addre one	e the tw sses for site coo	/o • the de
Sender	Address					HELP	SenderAdd	Iress Details
Search	or select as yo	u type	GO Show Filt	er Options	+ ADD NEW ADD	RESS	Name	CP IT ONLINE SMARTXPRESS TEST
Displayi	ng 1 - 3 records o	out of 3					Company	CP IT Online smartXpress Test
	QuickName	Contact	Company	Town/City	Site Code		Address	
Γ	CP IT ONLINE SMARTXPRESS TEST		CP IT Online smartXpress Test	City Akl	189824		151 Victoria Level 1-Col City Akl	a Street West urierPost House
	TestSenderNew			Auckland	189824		Contact	
	Rob Telecom T2		CP IT Online smartXpress Test	Auckland CBD	118258		Tel Site Code	189824
DOWN	LOAD ALL					1 <u>Delete</u>	Duplicate Re	ecord

- User addresses could be as simple as having different floors for the same location (e.g. 1st floor in one address, 4th floor in another).
- Each user has one address allocated as the default address when they are set up (this is who they usually create labels for).

Add new address

- 1. Click on the yellow Add New Address button.
- A new window opens for you to enter all the details relating to this address. Fields marked * are mandatory.

Add New Sender Address		
Site Code * Select Site Code Quickname * Company * © Street Address C PO Box / Private Bag # UnitNo/Apt No/Bld No	Contact Phone Mobile Email Fax	
Street No, Street Name, Suburb, Town/City.* TIP:Find the suburb by inserting % after the street and before the town/city. Type to select address details. Click here if you can't find street number. Country New Zealand Postcode	SAVE Cance	

- 2. Complete at least these mandatory fields.
- 3. Click the Save button. The record will be added to your address list.



Quickname is used like a nickname (you could use your ERP Debtor codes), and is a fast way for you to search for and locate a sender address from the list.

Search for existing sender address

Search on their Quickname, Company, Town/City or a combination of all these fields. **All** is the default selection – bypass steps 1 and 2 if you want to use the default.

- 1. Click the Show Filter options link.
- 2. Select at least one option for searching.
- 3. Begin typing the receiver name in the search field. A drop down displays the results.
- 4. Click on the correct name.
- 5. Click the green Go button.
- You could also just click on the record from the list if you see them on the page.

Edit address details

You cannot edit the frequent address that was generated when the company was set up; you can only edit sender address records that you have added.

- 1. The record is highlighted in yellow with the sender details panel showing on the right hand side of the screen.
- 2. Click the Edit button on the panel. The record is opened.
- Fields marked * are mandatory.
 - 3. Click in the field(s) to be edited and enter the updated data.
- **To save changes to the record:**
 - 4. Click the Save button.
- To remove this sender address from the list:
 - 5. Click the Delete button

Once you have edited the record you are back in the list with only the sender address record displaying.

- To return to the full list:
 - 6. Click the Clear search link

(If you deleted the record you will automatically be returned to the full list).

- To delete a sender address from the list without editing the record:
 - 7. Find the sender in the list.
 - 8. Click the checkbox to select them.
 - 9. Click the Delete link at the bottom of the records list.

Duplicate a record

To add another address that is very similar you can choose to duplicate the record and simply modify the necessary fields.

- The Quickname <u>must</u> be unique for the record to save.
 - 1. Find the address from the list.
 - 2. On the right hand sender address details panel, click the Duplicate record link.
 - 3. Make any alterations that are required.
 - 4. Click Save.

Download all

You can download the full sender address list to a file, for example an Excel spreadsheet.

1. Click the download all button

A window opens:

- 2. Click one of the two buttons offered to select the file type (CSV or Excel)
- A file download window opens with options to open, save or cancel.
- Follow the steps to complete the download.

Track n Trace

This function lets you retrieve the status of any ticket. Ticket-it references CME to pull through the latest information.



Items over 50 days old are no longer active and cannot be retrieved via this function. Contact 0800 Courier regardng records older than 50 days.

Track & Trac	e							
Ticket Number(s) Date Printeo		Customer Refer	ence	Consignment #	SEARCH Cle	ar Advanced Se	<u>arch</u>
Displaying 1 - Date	2 records out of 2 Ticket #	Site Code	Company	Town/City	Consignment Notes	Status	View Details	SIG
03 Jul 2008	1898240000573201CHA003HN	189824	Aunt Betty	Christchurch		Online Manifest 3/07/2008 12:00:00 a.m.	+	
03 Jul 2008	1898240000573301CHA003HN	189824	Aunt Betty	Christchurch			+	

- Define the search criteria. You can search on a known ticket number, the date printed (values include today, yesterday, last 3 days, last week) or a custom search. You can also use a combination of search criteria.
 - 1. Click in the Ticket numbers field and type a unique number to search for, and/or

 - Select the Date printed option from the drop down field, and/or
 Enter a unique Customer reference if required, and/or
 Type the Item inventory detail that was included in the label print, and
 - 5. Click the green Search button.
- The record or records are displayed.
- If no records are found an error message displays. Check whether the item is over 50 days old. If it was only recently sent it may not yet have been received into track n Trace.
- Try another search using different criteria.
 - 6. Click the Clear link to clear results and start a new search.

Custom/advanced search

1. Click the Advanced search link OR select Custom Search from the Date printed drop down box (recommended) to open the advanced search options.

Track & Trace	
Ticket Number(s)	Date Printed Customer Reference Consignment # Custom Search Clear Simple Search
Advanced Search Options	
From Date Printed	Site Select Group Select
To Date Printed	Town/City

- The options area displays.
 - 2. Click the From date printed box to generate a drop down calendar. Click the date required.
 - 3. Click the To date printed field and repeat the actions as above.
 - Select a site code if required.
 Select a Group if required.

 - 6. Enter a town or city if required.
- You can also use the Customer reference and Inventory notes fields in conjunction with these search criteria.
 - 7. Click the Search button to start the search.

Search results

Results are displayed one record per line.

Date Ticket # Site Code Company Town/City Co	Consignment Notes Status View Details S	IG
03 Jul 2008 1898240000573201CHA003HN 189824 Aunt Betty Christchurch	Online Manifest 🕀	

- 1. Click on the + sign shown in the View details field to open the details window.
- 2. Click the done button to return to the results list.

Manifests & Reports

All pending ticket records are displayed here until the manifest is sent. This is normally done automatically on a regular cycle. When the pending manifest has been sent successfully the item table will be empty.

- Reports can be generated from the Print history screen.
- The usage report shows all successful user logins with date and time.

Print history report

This report displays all records from the print history table for the customer ID which is related to your login.

- A list of printed tickets displays.
- Select search criteria for specific dates or ticket numbers. Results display in a list.

icket	Number(s)		From Date	3 Jul 2008	To Dote					66	NER/	TE R	EPORT			
						4		July	y, 20	08		•				
ispla	rying 1 - 1	10 records out of 3164				Su t	Mo	Tu	We	Th	Fr	Sa				
Π	Date	Ticket #	Sender	Receiver	Company	29 6	30 7	1 8	2 9	3 19	4	5	Ancillary	Price	Return Label	View Detaile
	13 Jun 2008	1898240000061101AKL003HN	CP IT ONLINE SMARTXP	Sharleen	Marker	13 20	14 21	15 22	16 23	17 24	18 25	19 26	00,2000	\$4.53	No	
	13 Jun 2008	1898240000061201AKL003HN	CP IT ONLINE SMARTXP	ncemi	Marker	27 3	28 4	29 5	30 6	31 7	1 8	2 9		\$4.53	No	۲
	13 Jun 2008	1898240000061301AkL003HN	CP IT ONLINE SMARTXP	ReceiverContact1	ReceiverCom	npa	Too	day:	July 3	3, 200	10			\$4.53	No	٠
	13 Jun 2008	1898240000061401AHL003HN	CP IT ONLINE SMARTXP	ReceiverContact2	ReceiverCorr	npa								\$4.53	No	Ŧ
	13 Jun 2008	1898240000061501AKL025AN	CP IT ONLINE SMARTXP	Sharleen	Marker									\$4.92	No	Ð

Sort the list in alpha ascending or descending order by clicking on a column heading name.

- 1. Click the checkbox against a record to select the record
- 2. Click the reprint button if another label is required. The system will generate a NEW barcode, not the original one.
- 3. Click the + sign under view details to see print history details

View Print History	- Labelling Detail	
Marker , Jericho House, 36, Wi	liamson Avenue .	
Contact: Sharleen		Tel: 9202115
Customer Reference:		Consignment Notes:
Delivery Instructions:		
Package Type	CPOLTP	
Weight	3	
Additional Services		
CourierPost Price	\$4.53	
Quantity	1	

- Download search results (all results, not individuals) to a spreadsheet if required.
- Follow the prompts to confirm your action and either open or download the file. File format must be either .xsl or .csv.
- Cancel to remove the search results and clear the search filters.

Pending manifest

This list displays by default all the pending tickets which have not been sent. The pending manifest is automatically sent throughout the day. You do not need to do anything with the pending manifest.

If the manifest has not been sent the listed records display with the following information: Ticket Number, Location, receiver, company, service type, ancillary service, Price, Manifest date and the site code.

Pending Manifest	sage Report	Print History Report					•	BOOK A PICKUP
Pending Manifest								HELP
Displaying 1 - 1 records out of	1							
Ticket #	Location Name	Receiver	Company	Service Type	Ancillary Service	Price	Manifest Date	Site Code
1898240000573201CHA003HN	Hoon Hay.	bettycourierpost.co.nz	Aunt Betty	CPOLTP		\$4.53	03 Jul 2008	189824
SEND MANIFEST DOWNL	OAD ALL							1

Usage report

The usage report lists all users who have logged in with the following details: Username Login date Login result Error message User IP address

User Activity Reports							
Username/Email F	rom Date	To Date	SEARCH				
Displaying 1 - 10 records out of 6095							
Username/Email	Login Date	Login Result	Error Message	User IPAddress			
sheri.fox@nzpost.co.nz	01:37 / 03-Jul-2008	Success	Login Success	10.92.27.51			
sheri.fox@nzpost.co.nz	11:33 / 03-Jul-2008	Success	Login Success	10.92.27.51			
glenn.dodd@expresscouriers.co.nz	10:34 / 03-Jul-2008	Success	Login Success	10.92.27.51			
sheri.fox@nzpost.co.nz	09:31 / 03-Jul-2008	Success	Login Success	10.92.27.51			
sheri.fox@nzpost.co.nz	08:41 / 03-Jul-2008	Success	Login Success	10.92.27.51			

Calculating Weights

Weight calculations are done automatically using the following rules:

Dimensions (entered in centimetres) are converted to meters for the calculation. Length x Width x Height x 200 = kilograms. Cubic measurement x 200 = kilograms. Examples:

10cm x 20cm x 30cm = 0.10 x 0.20 x 0.30 x 200 = 1.200kgs

```
Cubic 0.025 x 200 = 5kgs
```

(Note that cubic = length x width x height (in meters).)

If the physical weight is greater than the volumetric weight then the physical weight is the price shown. If the volumetric weight is greater then this is the Rated weight and is the price shown.

Technical Requirements

In order to access and fully optimise the Ticket-IT labelling system, we recommend the following minimum specifications for your computer's hardware and software.

	IBM Compatible Computer	Apple Computer				
Processor	Pentium or equivalent processor	G3				
Operating System	Windows 2000 or XP	OS10.4				
RAM	256 MB	256 MB				
Web browser software	Internet Explorer [©] v6 or higher, Mozilla Firefox v1.0.4 or higher	Apple Safari V3, Mozilla Firefox v1.0.4 or higher				
Modem	Recommended minimum of 56kbps					
Internet Access	A connection to the Internet through an Internet Service Provider (ISP)					
Screen Resolution	A screen resolution of 1024 x 768 is preferred					
Javascript	Javascript must be enabled on your browser					
Session Cookies	Cookies must be enabled on your browser					
Pop-Ups	Browser pop-ups must be enabled					

- If your settings do not meet these minimum requirements, we recommend upgrading the operating system and browser so that you fully benefit from using Ticket-IT.
- More than one user can access Ticket-IT from the same computer, but only if each user is accessing the system via different web browser types.
- Javascript *must* be enabled in order to use Ticket-IT.
- You will need to install additional files. For example, in order to suppress Print Dialogue when printing, you can install ActiveX. This can only be used on Browser Internet Explorer v6 or higher. You may require Administrator access to install this file on your system.

Label stock requirements

- Ticket-it uses the 24 character barcode and has also changed the orientation of the label to reduce the number of scan errors. These modifications require slightly larger labels than those previously used by SmartXpress.
- The labels can be ordered from the CourierPost website.

The product codes are:

New for Ticket-it

CPTICKET38 (38 mm core) CPTICKET76 (76 mm core) CPTICKETA4 (Laser A4) CPTICKETA5 (Laser A5) Old for SmartXpress CPTHERM39 CPTHERM76 CPLASERA4 CPLASERLAB

Include logo on labels

If you would like to have your company logo print on your labels you can do so. You will need to supply a .jpg file 280x40 maximum to Ticket-it Support, who will upload the logo to your account. Please speak to your business manager for more information.