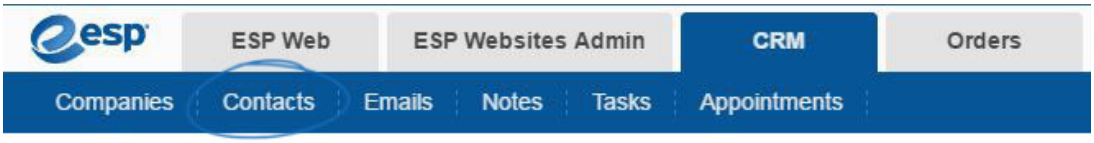
Automatically Display Primary Contacts

Jennifer M - 2019-09-27 - Modify Order Info

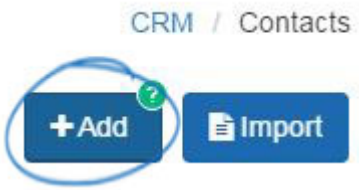
When creating an order in ESP Orders, a customer may have different contacts and/or address for billing, shipping, and/or acknowledgements. For example, if your customer is ABC Company and within that organization, Jane Doe is responsible for billing, while Joe Smith is the primary contact for shipping and acknowledgements. ESP Orders enables you to link these contacts to the main company, so that when you select ABC Company from the Customer dropdown, the different contacts and addresses automatically display.

Designate a New Contact as Primary

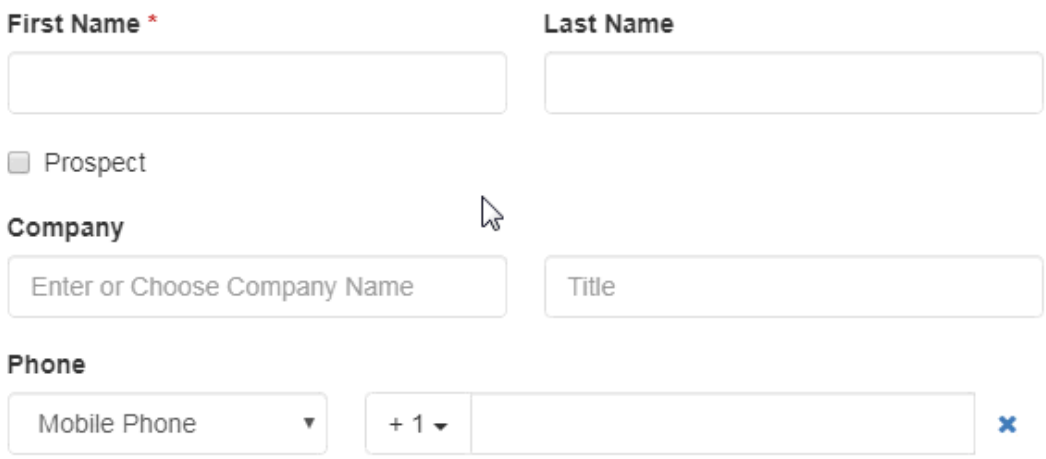
If the contact you would like to designate as the primary is not yet in your CRM, the first step is to ensure their company exists in CRM. Locate the company or create a new one. Once your company has been located or created, you will want to create the contact(s) and link them to the company. To create a contact, click on Contacts from the CRM toolbar.



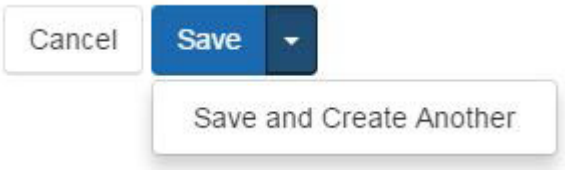
In the Contacts area, click on the Add button.



Enter the first and last names of the contact. Then, use the company dropdown and select the company to which this contact should be linked. Checkboxes for billing, shipping, and acknowledgement will appear below the company dropdown. If this contact is the primary for any of these fields, check the appropriate box.

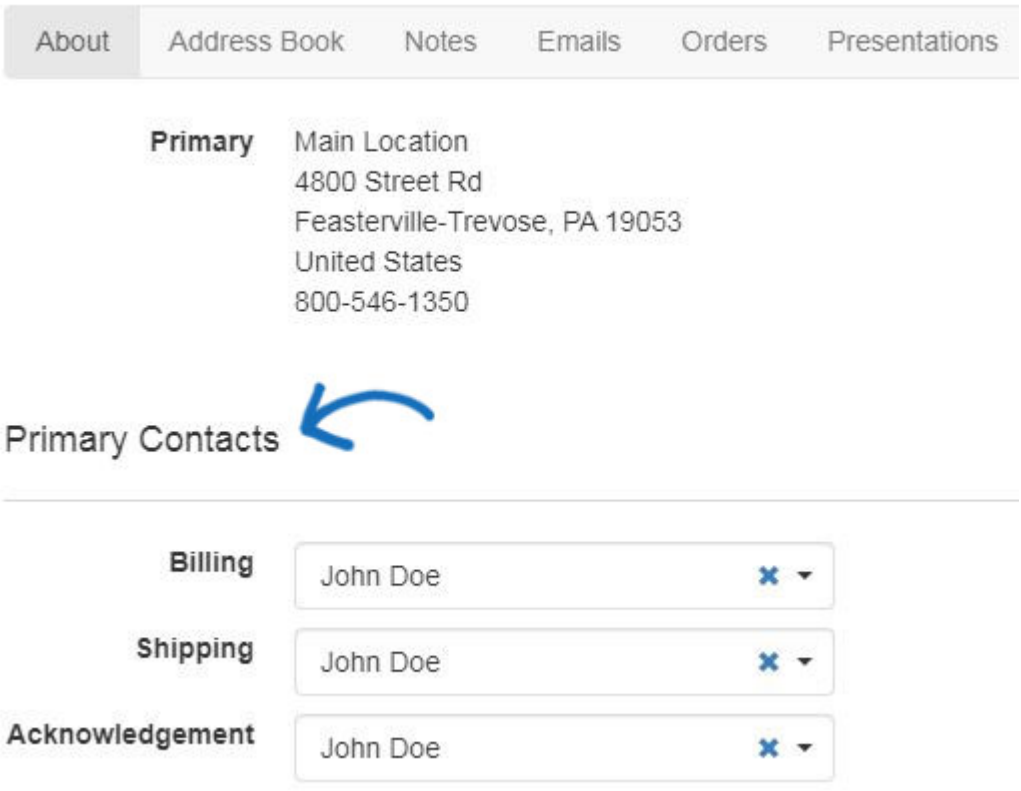


Enter as much information for this contact as possible. Once you have finished, click on the Save button. If you need to add more than one contact, use the arrow next to the Save button to select "Save and Create Another".



Designate an Existing Contact as a Primary

To set an existing contact as a primary contact, locate the company and click on the company listing. In the About section, there is a section for Primary Contact. Use the dropdowns to select which contact should be the primary for Billing, Shipping, and Acknowledgements.



The contacts will be automatically saved.

When you create your next order with this company, use the Customer dropdown to select the company. The Billing, Shipping, and Acknowledgement Contacts will automatically be displayed with their individual addresses.
Note: If you do not have a primary contact established for a specific contact, the main address of the company will be displayed.

Related Content

- Contacts In CRM