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ESP Quick Tip #7: Add a Default Shipping Carrier and Account Number for a Company

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Adding a default shipping carrier and account number for a company is a time saving feature because it will automatically apply this information to all orders created in ESP for that customer.

To add a default shipping carrier and account number to a company record, take the following steps:

1. After logging into ESP, click on the CRM tab.

Companies



 By default, you will be brought into the Companies section. Locate the company to which would like to add the shipping account information and click on the company's name.

All Companies Customers Suppliers Decor	ators Prospects	
Q Search for address, phone, etc.	1	^A z By Name ▼
Num	per of Companies: 14	
A		
ABC Customer Company 800-546-1350 info@abccompany.com	4800 Street Rd Feasterville-Trevose PA, 19053 United States	٠

3. Click on the pencil icon in the upper right corner.



4. The Edit Company screen will display. Scroll down and click on the Billing Information

link to expand that section. Then, click the Add Shipping Account link.

Edit Company

ABC Customer Company						
🗹 Customer 🗌 Supplier 🗌	Decorator	r 🗌 Pros	pect			
Phone						
Office Phone	~	+ 1 -	800-546-1350			
Add Phone						
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Work	~	info@abccompany.com				
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After you having the default ship via and account number entered in the CRM will be shown directly under the shipping contact on any orders using that company as a customer.