



ESP Quick Tip #34: Add Shipping Account for Company in CRM

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To add a shipping account which to be used as a default during order creation, you can do so in CRM! After logging into ESP Web and clicking on the CRM tab, locate the company to which you would like to add the shipping account. Then, take the following steps:

1. Click on the Company name to open the record, then click on the Pencil icon in the upper right corner.

CRM / Companies / ABC Promo Company



2. Click the Billing Information link.

Tags

Enter or Choose Tag

Third Party System Name ID

Billing Information

Record Owner (Person responsible for this record)

ESP User

Visible to

- ☒ Everyone
- ☐ Only the Record Owner ?
- ☐ Teams or Individuals ?

3. Click on the Add Shipping Account link.

Default Currency

USD - US Dollar

Add Shipping Account

4. Use the dropdown to select the Carrier and then type your account number in the adjacent box.

Default Currency

USD - US Dollar

ship via

UPS Ground



Account

ABCD123456



Add Shipping Account

When you are finished, be sure to scroll to the bottom of the record and click on the Save button. The Shipping Account information will now automatically be applied to all orders

you create for this customer.