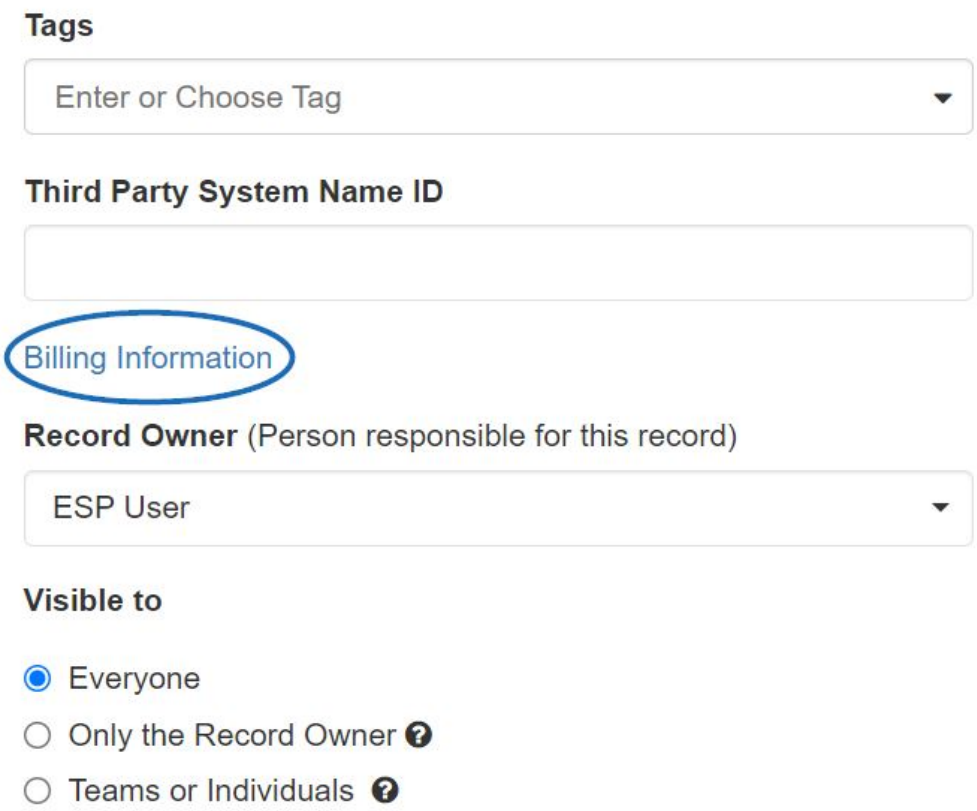
ESP Quick Tip #34: Add Shipping Account for Company in CRM

2022-04-19 - Jennifer M - ESP Quick Tips

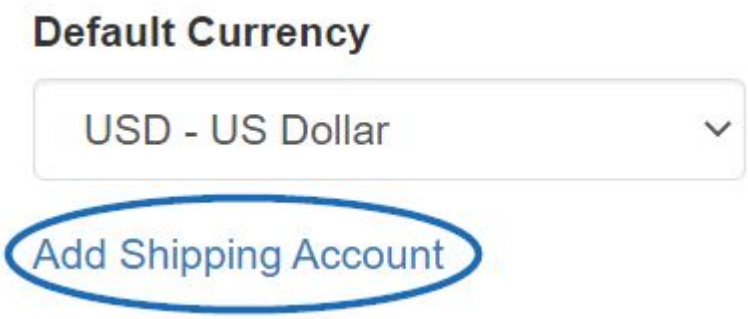
To add a shipping account which to be used as a default during order creation, you can do so in CRM! After logging into ESP Web and clicking on the CRM tab, locate the company to which you would like to add the shipping account. Then, take the following steps:

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

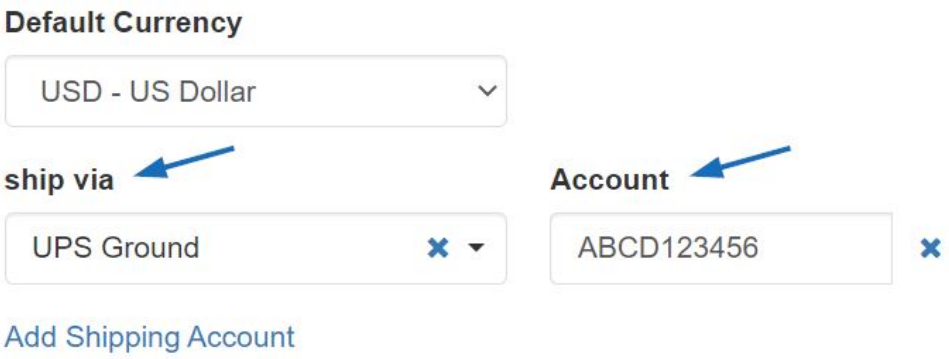
2. Click the Billing Information link.



3. Click on the Add Shipping Account link.



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



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.