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

2021-04-16 - Jennifer M - ESP Quick Tips

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 Compan	customers Suppliers	Decorators	Prospects		
<b>Q</b> :	Search for address, phone, etc.				↓ <sup>A</sup> <sub>Z</sub> By Name ▼
		Number of C	Companies: 14		
A					
	ABC Customer Company 800-546-1350 info@abccompany.com			4800 Street Rd Feasterville-Trevose PA, 19 United States	053

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	Prosp	pect			
Phone						
Office Phone	~	+1-	800-546-1350			
Add Phone						
Email						
Work	~	info@abccompany.com				
Add Email						
Add Email Domain						
Add Website						
Primany Contacts						
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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.