Automatically Display Primary Contacts

Jennifer S - 2019-09-27 - Orders

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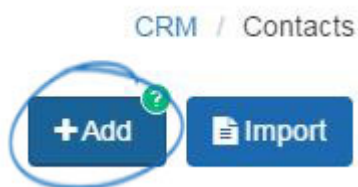
Enter the first and last names of the contact. Then, use the company dropdown and select the company to which this contact should be linked. Checkboxes for billing, shipping, and acknowledgement will appear below the company dropdown. If this contact is the primary for any of these fields, check the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

First Name *

Last Name

☐ Prospect

Company

Enter or Choose Company Name

Title

Phone

Mobile Phone ▼

+ 1 ▼

✖

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".

Cancel   Save   ▼

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.

About   Address Book   Notes   Emails   Orders   Presentations

Primary   Main Location
4800 Street Rd
Feasterville-Trevose, PA 19053
United States
800-546-1350

Primary Contacts

Billing   John Doe   ✖ ▼

Shipping   John Doe   ✖ ▼

Acknowledgement   John Doe   ✖ ▼

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

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