




Company Profile

Wendy D - 2022-10-19 - ESP Admin

The Company Profile area is where administrators can update the company information within ESP.

Administrators can update the company demographics; the required fields are Company Name, Email, and Phone number. Including a website is optional.

 **Company Profile**

Company Name *

Email *

Phone *

Website

If you have a third party ordering system, you can enter the name of it in the Third Party System Name field. This is a required field, but will automatically have the name for the ESP Orders system provided, meaning if you use ESP Orders, you're good to go.


You can also enter your company's address here including the city, state, postal code and country.

Address

Address 2

City **State/Province** **Postal Code** ⓘ

Country



The options for default order settings:

- **Default Salesperson:** Select to have either the order creator (user who creates the order for any customer, existing or new) or customer record owner (user who owns the customer account in CRM) set as the default salesperson when a new order is created.
- **Order Payments:** Check the "Do not allow user to request or enter payment" option if you do not want users to perform these actions.
- **Order Tracking:** Check the "Allow users to track revisions and re-orders" option to enable the New, Revised, and Reorder options on the order form.
- **Order Contact:** An orders contact can be important because it lets the supplier know exactly who to contact when necessary. On customer-facing documents, such as the purchase order, the order contact will be visible towards the top of the document. Select from the available options to set a default order contact. It is important to note that even if a default order contact is established, this information can be changed on the fly during the order creation process.

Default Salesperson

- Order Creator
- Customer Record Owner

Order Payments

- Do not allow user to request or enter payment

Order Tracking

- Allow users to track revisions and re-orders

Order Contact

- Allow users to set a contact for questions about an order

Choose a default contact

- Order Creator
- Customer Record Owner
- Someone else


The last section for "Order Discount" contains a checkbox allowing administrators to determine whether users of ESP should be able to enter discounts on order documentation. Checking the "Do not allow users to edit or enter a discount for a quote, order, invoice, or sample request" will remove the box from the order form. Below is a demonstration of how this setting looks in ESP Orders when it is checked and when it is not:

Admin Setting:

Order Discount

- Do not allow users to edit or enter a discount for a quote, order, invoice, or sample request

What Happens in ESP Orders:

Subtotal:	\$1,275.00	\$2,125.00
Discount:	<input type="text" value="0.00%"/>	\$0.00
Booked Margin:		\$850.00
		40.00%
Sales Tax:		\$0.00
 Use Current Rates		
Total Amount:		\$2,125.00

When you are finished, click on the Save button.