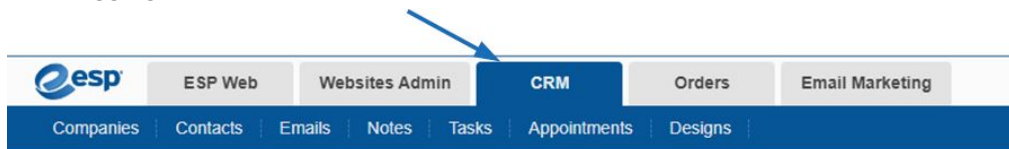# ESP Quick Tip #7: Add a Default Shipping Carrier and Account Number for a Company

2021-04-16 - Jennifer S - 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.

2. 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.

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

Company Name *

ABC Customer Company

☑ Customer ☐ Supplier ☐ Decorator ☐ Prospect

Phone

| Office Phone ⌄ | + 1 ⌄ | 800-546-1350 | ✖ |

Add Phone

Email

| Work ⌄ | info@abccompany.com | ✖ |

Add Email

Add Email Domain

Add Website

Primary Contacts

Billing		Shipping		Acknowledgement	
Jane Bennett	✖ ⌄	Jane Bennett	✖ ⌄	Jane Bennett	✖ ⌄

5. Use the dropdown to select the carrier and then type the account number in the available box. When you are finished entering the information, click on Save.

ship via	**Account**	
⌄	Enter account number to bill shipping	✖

Add Shipping Account

Record Owner (Person responsible for this record)

ESP User (Me) ⌄

Visible to

◉ Everyone
◯ Only the Record Owner ❓
◯ Teams or Individuals ❓

Cancel   **Save**

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.