Stock in the Channel

Module 2: Creating Accounts & Contacts

Modern Selling How-To Guides

Intro

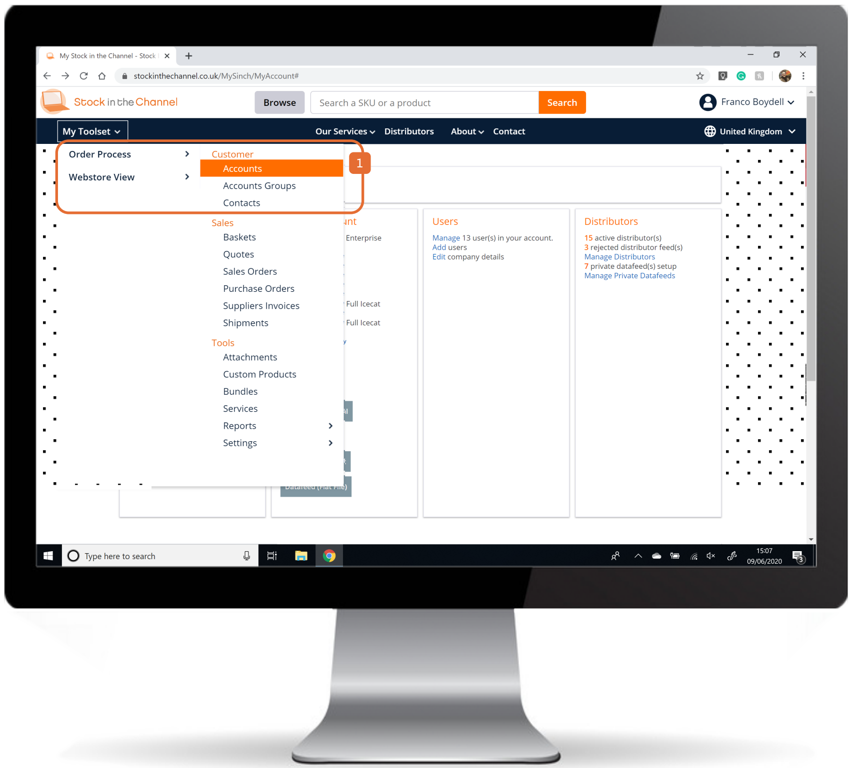
The Modern Selling ecommerce portal is packed with features to make life easy for you and your customers, and to automate processes where possible.

We have designed the Accounts & Contacts dashboard to best assist ongoing relationships and new sales opportunities.

This Guide will show you step-by-step how to create new Accounts and add Contacts and how to use the dashboard as a CRM to understand your customers behaviours.

SINCH How-To Guides

Step 1



Log in to your Stock In The Channel account.

1 In the top left corner, click **My Toolset**, then **Order Process** and select **Accounts**.

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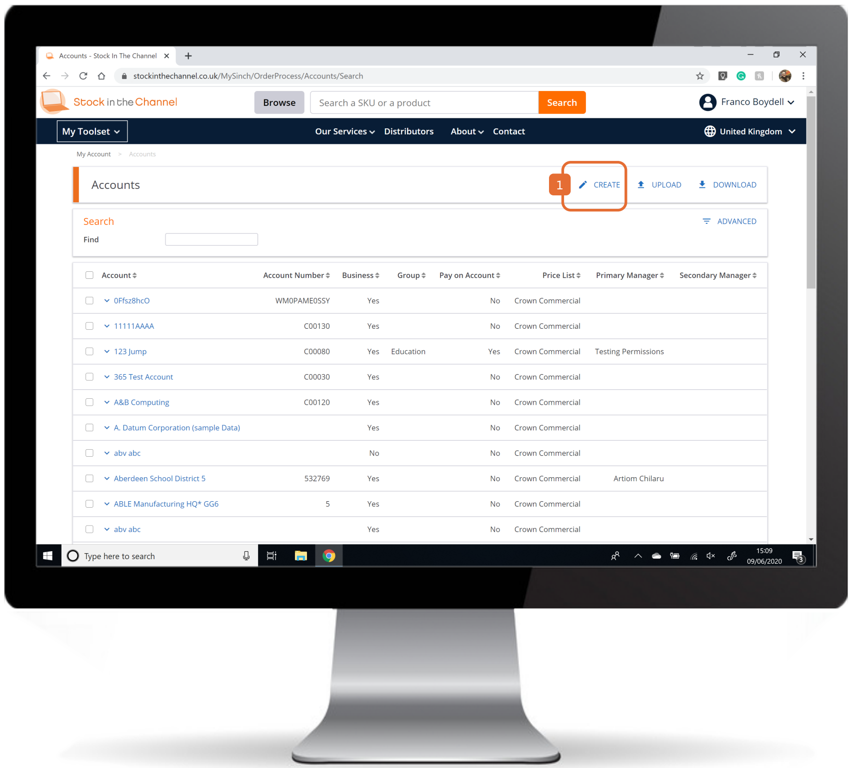
Step 2



There are 3 ways to upload new accounts:

i) Manually create an individual Account

ii) Upload a .CSV file that contains information on multiple Accounts

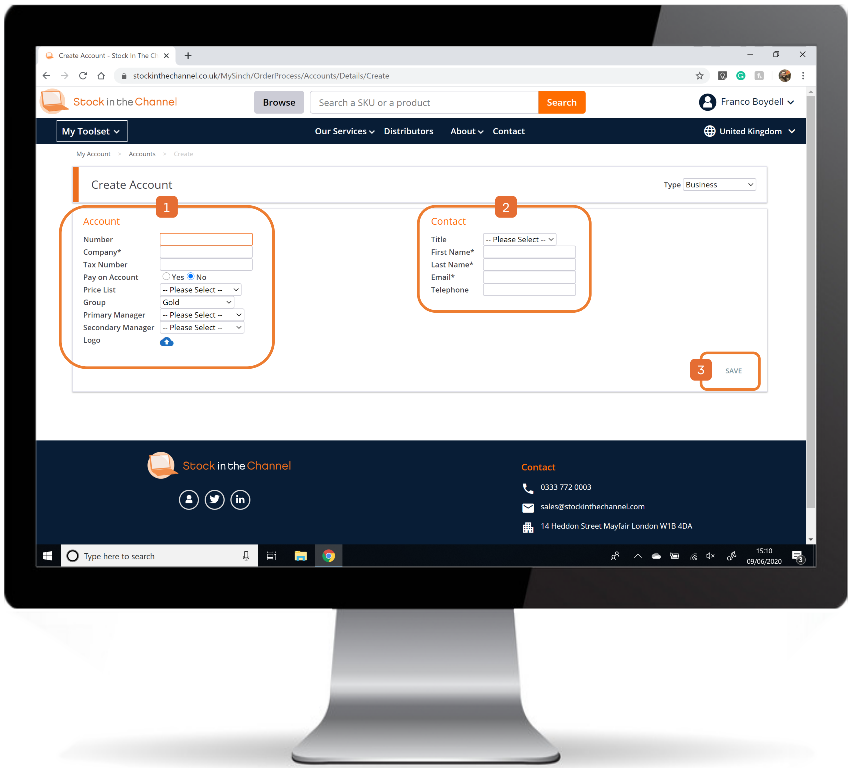
iii) Integrate your CRM or ERP to auto-populate Accounts with pre-exiting data.

NB. This the best option for enterprise businesses and will be implemented side-by-side with a SINCH team member.

This guide demonstrates the manual process to best explain the Accounts & Contacts features.

1 To begin; click CREATE

Step 3



Select the type of **Account** you're adding (Business or Retail) then input details.

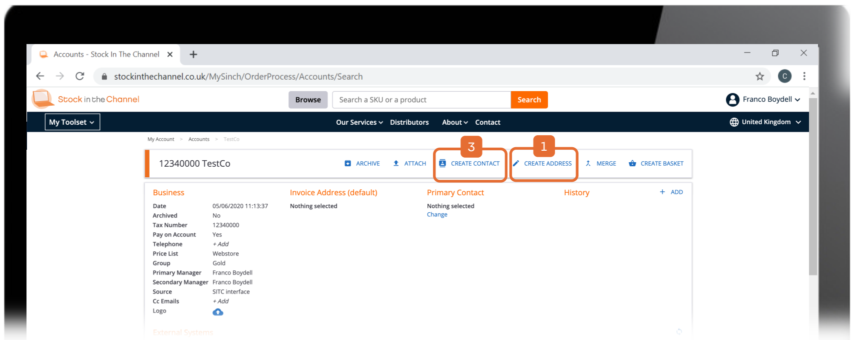
1. NB. Inputting as many details as possible will save you in time in the future and make it easier to integrate with a CRM.

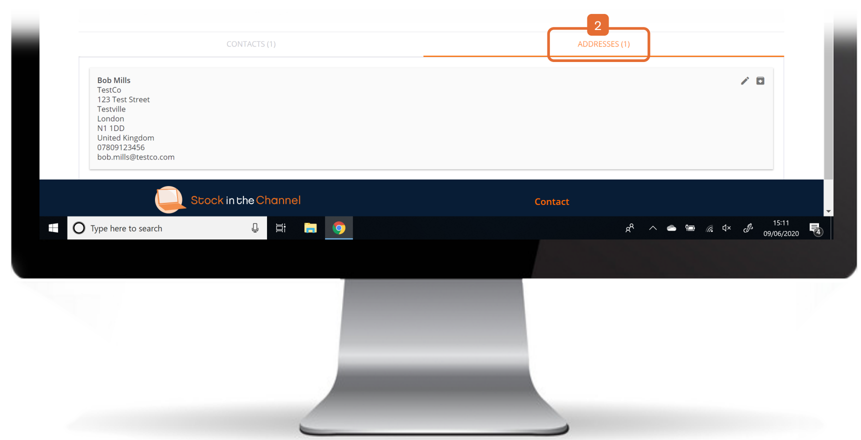
   Further details on Price List and Groups can be found in Module 3: Working with Customer Groups.

2. Add the main **Contact** details. Additional Contacts for this Account can be added later.

3. Click SAVE.

Step 4





1 You have now created an **Account**. The next step is to CREATE ADDRESS.

Accounts with many locations can have multiple delivery addresses.

2 ADDRESSES will appear in the tab towards the bottom of the page, on the right.

3 You can create as many **Contacts** as necessary for each Account.

Each Contact can have a default address, so that the order always gets sent to the right place.

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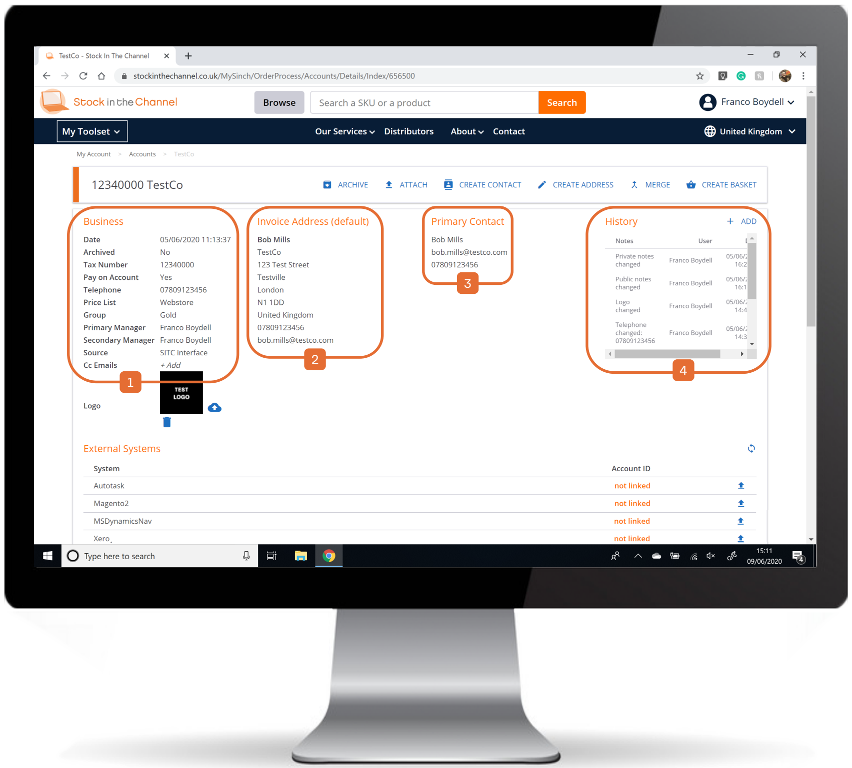
Step 5



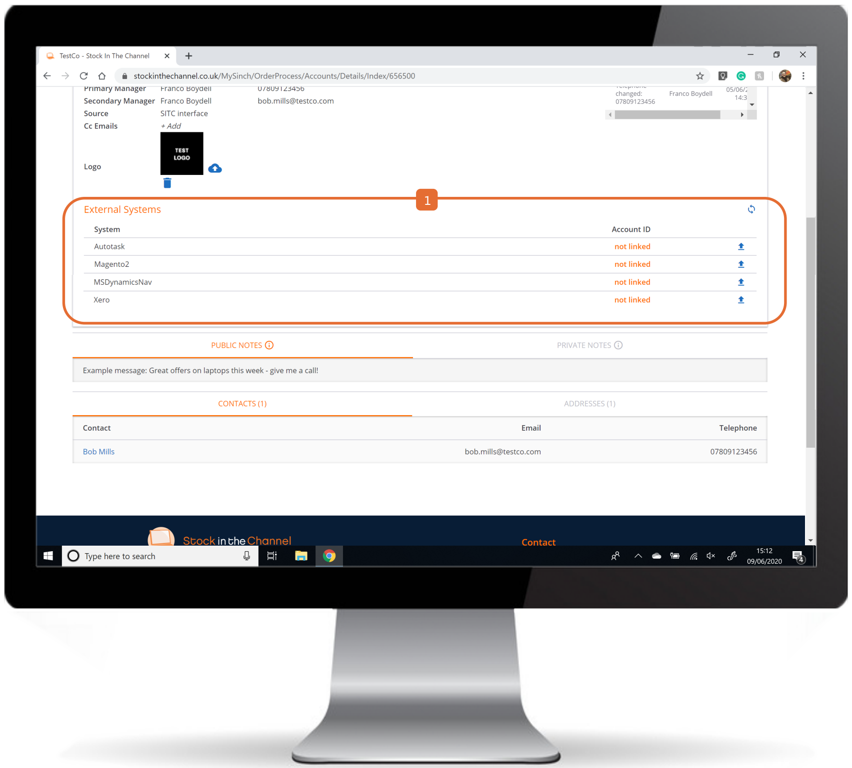
1. Make sure all **Business** details are filled in.

   Further details on **Price List** and **Groups** can be found in Module 3: Working with Customer Groups.

2. Then set the **Invoice Address** and default
3. **Primary Contact.**
   If these do not automatically show, please refresh your browser.

4. All changes to the Account are logged in the **History** so that all additions or edits are transparent within your organisation.

Step 6



If you have connected External Systems, your CRM or ERP and **Accounts & Contact can sync in both directions.**

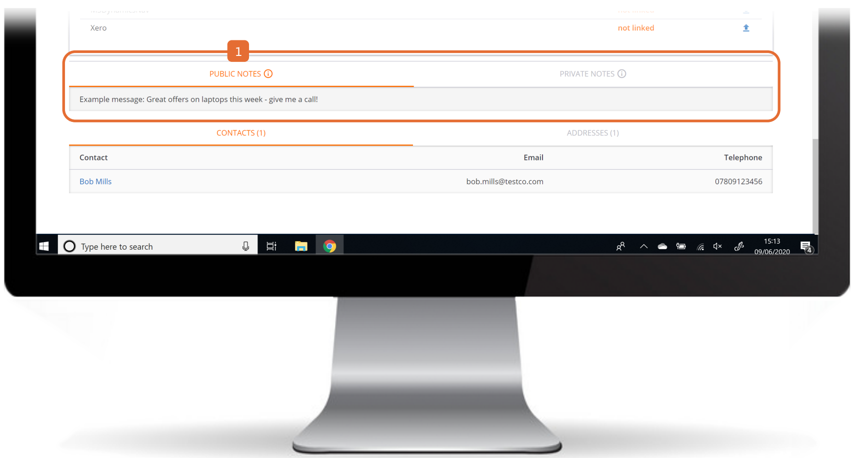
1 Click the blue arrow to populate your connected systems with your Accounts data.

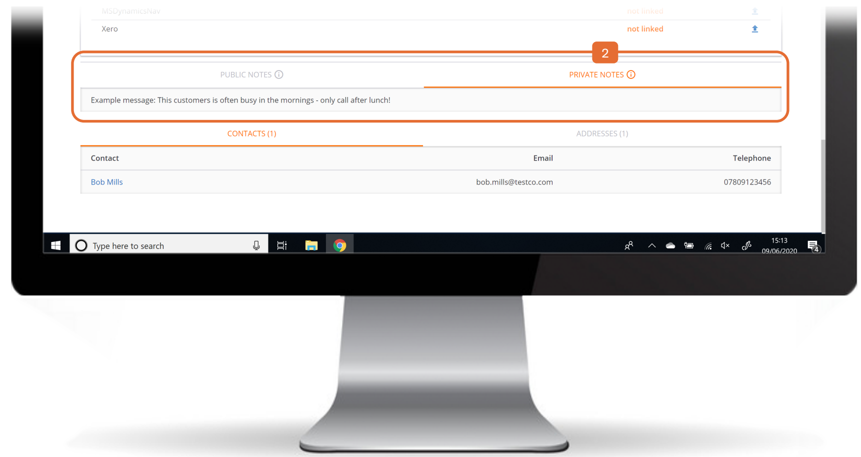
This can be set to synchronize automatically every 15 minutes or can be configured to update on-demand.

Your account manager will advise you on the best set up, but these configurations can be changed at any time.

Further details on **External Integrations** can be found in Module 6: Connecting External Integrations.

Step 7





1. Write messages in PUBLIC NOTES to share information with your Accounts & Contacts. These notes will appear on your customer's B2B Magento dashboard when they log in.

   Example: Great deals on laptops this week!

2. PRIVATE NOTES are internal messages for your own team. Use this tool to share relevant details of your correspondence for anyone dealing with this Account.

   Example: Only call customer in afternoon!

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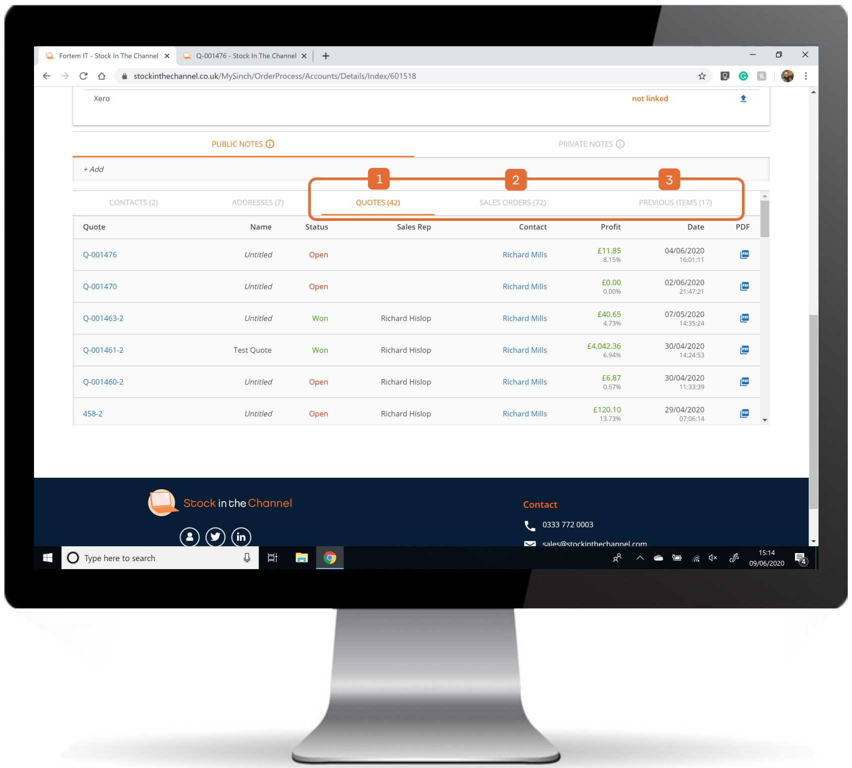
Step 8



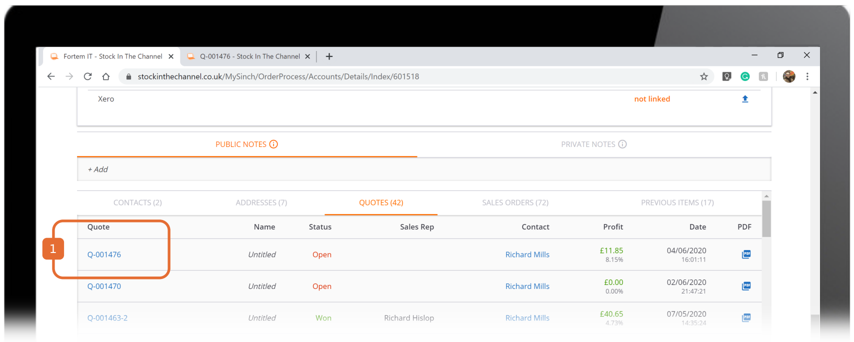
Once the Account has a history of;

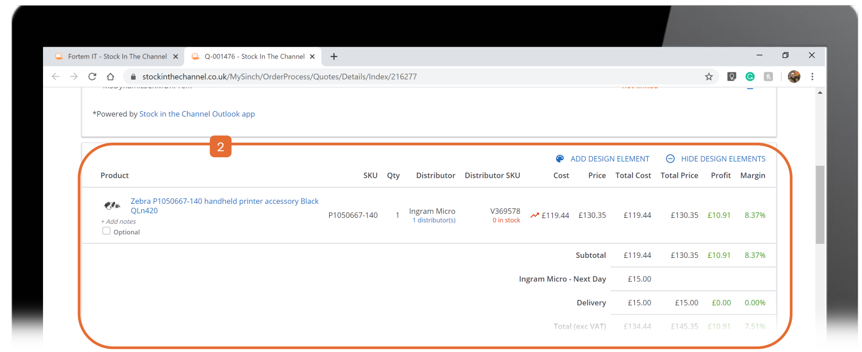
1. QUOTES,
2. SALES ORDERS and
3. PREVIOUS ITEMS

These tabs will appear on the Account dashboard.

This means you have all relevant information on each Account available in one place to review to inform your sales strategy.

Step 9





1. While on the QUOTES tab you can review any Quote. Click on the Quote number to open in a new browser tab.

2. Review all quote details.

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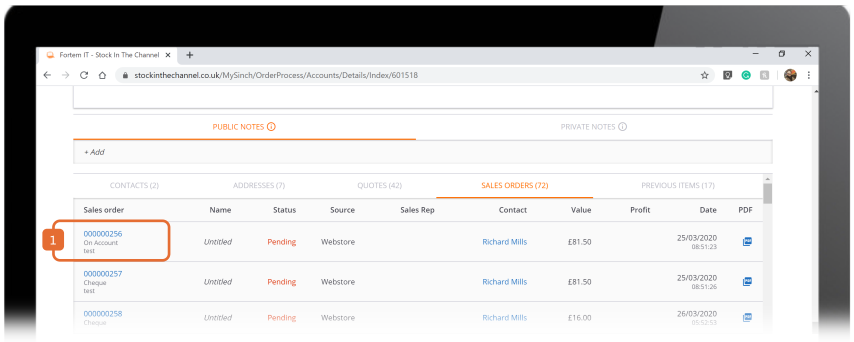
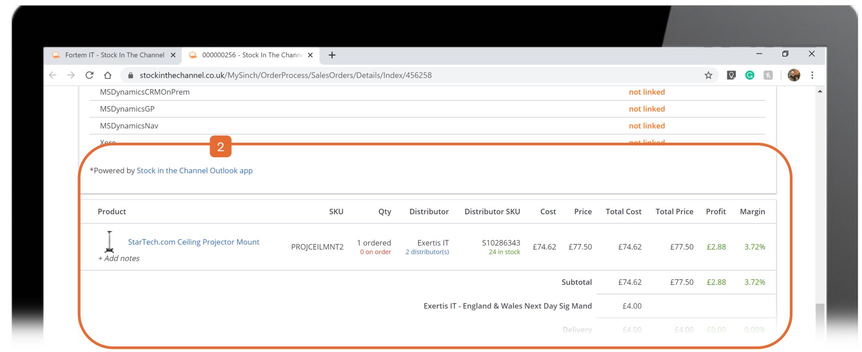
Step 10





1. While on the SALES ORDERS tab you can review any Sales orders. Click on the Sales order number to open in a new browser tab.

2. Review all Sales order details.

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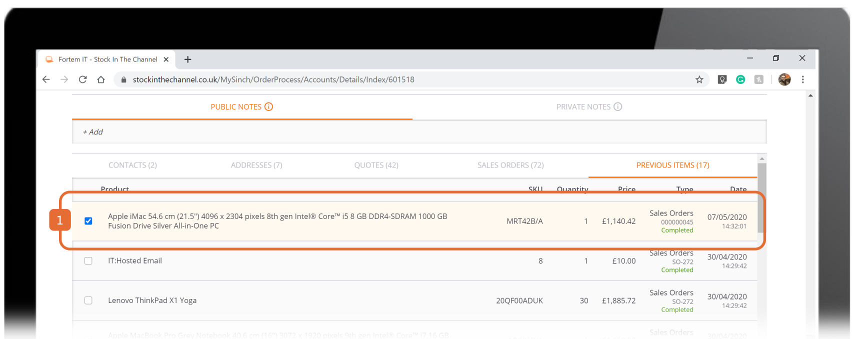
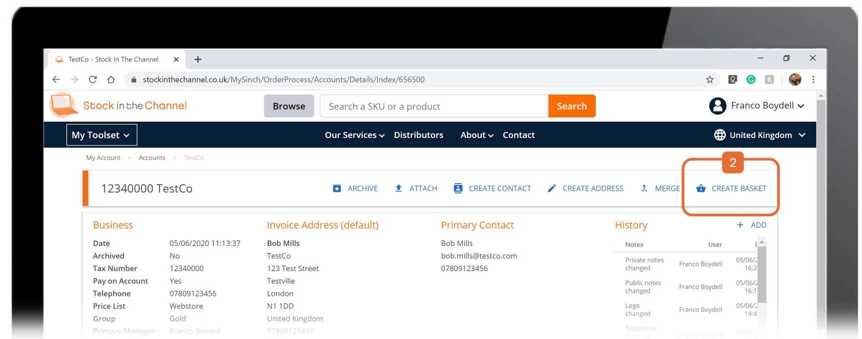
Step 11





While on the PREVIOUS ITEMS tab you can review any Products from previous completed Sales orders.

1 To re-order products, tick the blue box.

2 Then, return to the top of the Account page and click CREATE BASKET to create a basket with the same items.

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Thank you

You're now ready to move onto **Module 3: Working With Customer Groups.**

If you have any further questions, please email or call your Stock In The Channel Account Manager and they will be happy to provide any additional information.