



# Customer Onboarding SOP



# Overview

This procedure outlines the steps involved in our New Customer Onboarding process.

It was written to ensure that each customer is processed correctly.

Your Company Name here sends the onboarding packet to the new customer which includes a Contract, Data Integration Templates, & Credit Application

New Customer Orientation is scheduled and performed

Customer training on WMS functionality is scheduled and performed

**Proposal Sent**

**Executed Contract**

**Customer Orientation**

Fully Executed Contract is Received along supporting documents

WMS Account is activated and Customer Specific SOP Created and Distributed



## Fully Executed Contract Received

**New customer receives our Onboarding Email with the credit application, the item import template, the order template, the receipt import template, and their executed proposal. The leadership team at Logistics Provider is notified of the new customer.**

**All supporting documentation is uploaded into our CRM system.**

## Contract



1488 W. 10th St.  
Riverside, CA 92504  
Phone: (951) 517-1000

Pricing prepared for

Client Details

Company Name: [Text Field] Invoicing To: [Text Field]  
 Company Email: [Text Field] Email: [Text Field]

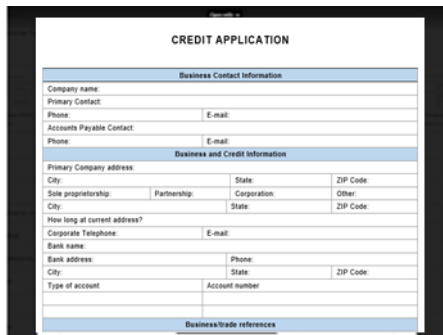
Account Information

Account Name: [Text Field] Accounting Contact: [Text Field]  
 Contact Name: [Text Field] Billing Address: [Text Field]  
 Phone: [Text Field] Email: [Text Field]

ITEM	DESCRIPTION	PRICE

Publication Fee: [Text Field] per point

## Credit Application



**CREDIT APPLICATION**

**Business Contact Information**

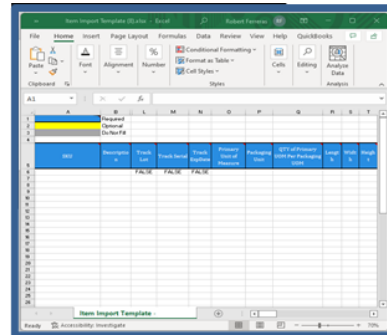
Company name: [Text Field]  
 Primary Contact: [Text Field]  
 Phone: [Text Field] E-mail: [Text Field]  
 Accounts Payable Contact: [Text Field]  
 Phone: [Text Field] E-mail: [Text Field]

**Business and Credit Information**

Primary Company address: [Text Field]  
 City: [Text Field] State: [Text Field] ZIP Code: [Text Field]  
 Sole proprietorship: [Text Field] Partnership: [Text Field] Corporation: [Text Field] Other: [Text Field]  
 City: [Text Field] State: [Text Field] ZIP Code: [Text Field]  
 How long at current address? [Text Field]  
 Corporate Telephone: [Text Field] E-mail: [Text Field]  
 Bank name: [Text Field]  
 Bank address: [Text Field] Phone: [Text Field]  
 City: [Text Field] State: [Text Field] ZIP Code: [Text Field]  
 Type of account: [Text Field] Account number: [Text Field]

**Business/trade references**

## Data Import Templates



Item Import Template (Excel) - Excel

File Home Insert Page Layout Formulas Data Review View Help QuickBooks

Clipboard Font Alignment Number Conditional Formatting Number Cells Editing Analyze Data

A1 B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Item	Quantity	Unit Cost	Unit Price	Product Name	Product Code	Product Description	Product Category	Product Subcategory	Product Type	Product Status	Product Location	Product Date	Product Time	Product User

Item Import Template

Ready Accessibility Investigate



# Customer Orientation

(Account Manager, Operations, CSR Team, &  
Finance Team)



## Customer Orientation Zoom Call

- The Account Manager will schedule a Zoom call between the CSR, Finance, and Operations Teams.
- During this meeting the team will make introductions and ensure that all contact information is provided.
- This is an opportunity for both teams to ask questions.
- A follow up email will be sent to the customer from the Account Manager with recap of the meeting



# WMS Account Setup

## (Account Manager)





# Create Account in WMS

## Assign CSRs

- Make sure that the CSRs and Operations teams have access to the customer in WMS

## Create Customer

- Add the billing details to the account
- Fill out customer details
- Create user account for customer and grant access to the warehouse



# Customer Training

(Account Manager)



# Customer Training

## Zoom call scheduled with Customer

Invite the customer to learn how to use our WMS system

## Training on how to check inventory in WMS

Make sure the customer knows how to check their inventory in the WMS

## Training on how to create an order in WMS

Make sure the customer knows how to create an order in the WMS



CSRs will begin  
scheduling inbound

1. Operations Team and Account Manager must make sure the containers and first receipts comply with their billing setup
2. If they require more unloading time or special services the CSR Manager and Sales rep must have a follow up conversation and have the contract updated.
3. Salesperson should call and confirm the customer has everything they need and that their account is being serviced appropriately.



# Follow Up

(Account Manager)



## At the end of the first billing cycle

### Send draft of invoice to the Leadership Team

Make sure the leadership team sees the first round of invoices for every customer

### Confirm charges and Review Receipts

Make sure that all receipts and orders are checked for accuracy and correct billing prior to the end of the month

### Communicate with the CSR Team

Make sure the CSRs are familiar with each step of the process