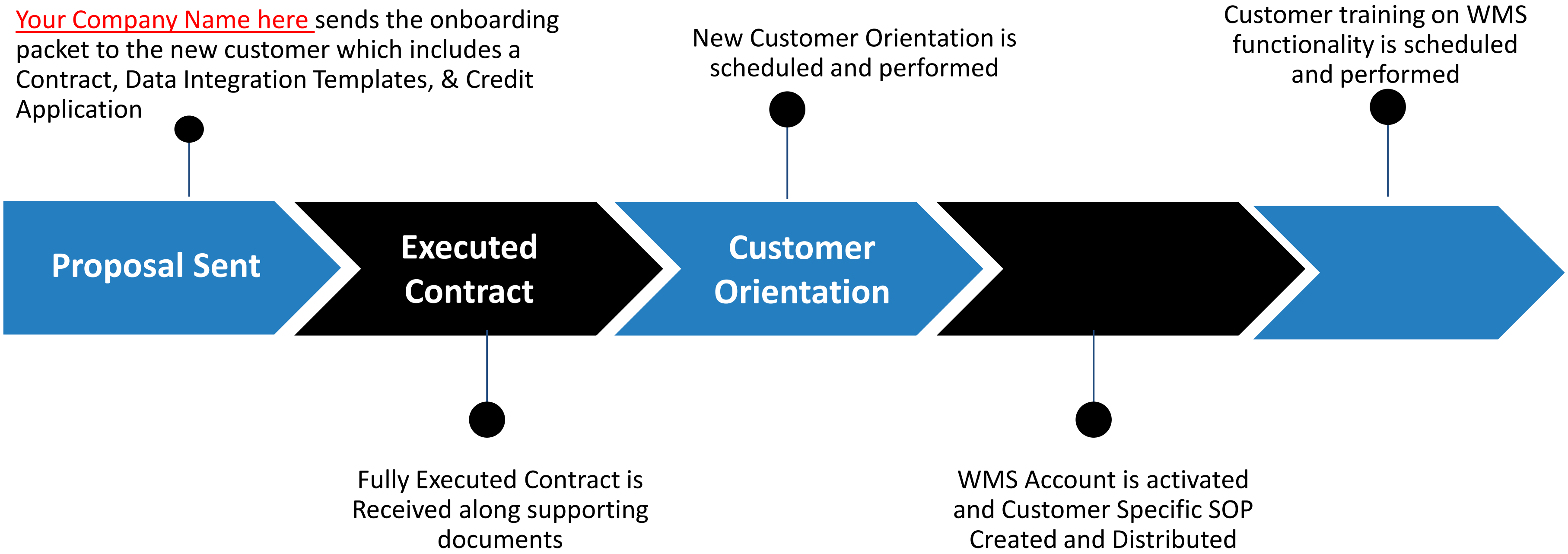
Customer Onboarding SOP

3PL Insight • 09.01.2024

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

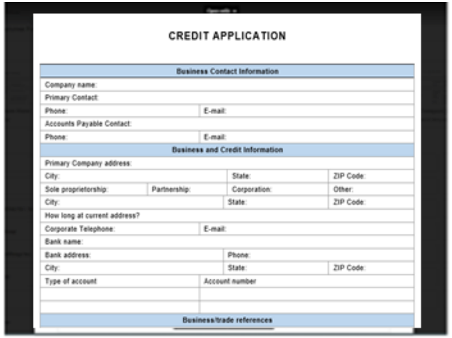
Fully Executed Contract Received

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

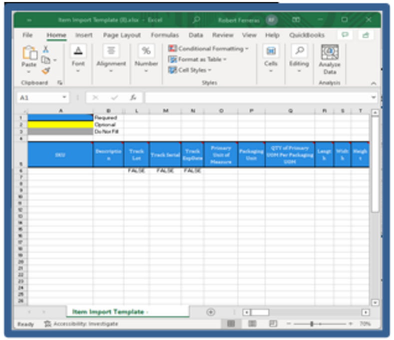
Credit Application



CREDIT APPLICATION

Business Contact Information			
Company name:			
Primary Contact:			
Phone:	E-mail:		
Accounts Payable Contact:			
Phone:	E-mail:		
Business and Credit Information			
Primary Company address:			
City:		State:	ZIP Code:
Sole proprietorship:	Partnership:	Corporation:	Other:
City:		State:	ZIP Code:
How long at current address?			
Corporate Telephone:	E-mail:		
Bank name:			
Bank address:		Phone:	
City:		State:	ZIP Code:
Type of account	Account number		
Business/trade references			

Data Import Templates



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