

Self-Service on My Account Starts with a Successful Registration

The top calls into our My Account digital team are to get help with registration. Registration may not process correctly for a few reasons, but we wanted to send out a reminder on one of them: Using the correct 'Customer Number'.

As you work with your customers and discuss using My Account for placing orders, checking order status, placing service requests, etc. help make sure they have the correct account number to register. The correct 'Customer Number' is the **Sold-To** for their account. There are a few different ways to locate this for you to provide it to your customers when registering for My Account. Review the attached document to find out how!

1. Tennant Invoice – On an invoice, the 'Customer Number' is the proper number for customers to use when registering

		Remit Payment To Tennant Sales and Service Company PO Box 71414 CHICAGO IL 60694-1414 USA		Tel: 1-800-553-8033 Fax: 1-763-513-2142	
Ship-To TENNANT COMPANY WEBLINK TEST ACCT 701 LILAC DR N GOLDEN VALLEY MN 55422-4611		TENNANT COMPANY WEBLINK TEST ACCT 701 LILAC DR N GOLDEN VALLEY MN 55422-4611		Invoice	
Bill-To TENNANT COMPANY WEBLINK TEST ACCT 701 LILAC DR N GOLDEN VALLEY MN 55422-4611		Invoice Number 900002503 Invoice Amount 169.97 Currency US Dollars Document Date 06/05/2009 Payment Terms 2% 10 Days Net 30 Days If paid before 06/15/2009, deduct 3.18 Final due date 07/05/2009		Customer Number 1111111	
		Shipped Date 06/05/2009 Delivery Number 85687043 Order Number 52621613 Delivery Terms FOB SHIPPING PT FRT PPD & ADD			

2. Tennant Quotation/Order Acknowledgement – On a quote, the 'Customer Number' is the proper number for customers to use when registering

		Tennant Sales and Service Company 701 N. Lilac Drive Minneapolis, MN 55422 USA Tel: 1-800-553-8033 Fax: 1-763-513-2142		Quotation/Order Acknowledgement	
Ship-To TENNANT COMPANY WEBLINK TEST ACCT 701 LILAC DR N GOLDEN VALLEY MN 55422-4611		Customer Number 1111111 TENNANT COMPANY WEBLINK TEST ACCT 701 LILAC DR N GOLDEN VALLEY MN 55422-4611		Quotation Number 20330015 Quotation Date 06/05/2009 Valid Until 07/08/2009 PO Number TEST QUOTE Buyer TEST MONITORING Delivery Terms FOB SHIPPING PT FRT PPD & ADD Payment Terms 2% 10 Days Net 30 Days Currency US Dollars	
				Bill-To TENNANT COMPANY WEBLINK TEST ACCT 701 LILAC DR N GOLDEN VALLEY MN 55422-4611	

3. **CRM Account Record** – When locating the correct ‘Customer Number’ in CRM there are a few things to take into consideration
 - a. Always check the **Account Group** field first to see how the account is set up (Sold-to party, Customers CRM, Ship, End-User, Prospect, etc.).
 - b. You need to give your customer the **Account Number** from their ‘**Sold-to party**’ or ‘**Customers CRM**’ account.
 - c. You can also view if an organization has previously registered for My Account by viewing the **My Account Registered** field.

‘**My Active Accounts**’ View: check the Account Group, My Account Registered, and Account number in one view

My Active Accounts Edit columns Edit

Group By: (no grouping)

Account Name	Address 1: Street	Address 1: ...	Region	Address 1: ...	Address 1: Coun...	Account Number	Name 2	Parent Account	MyAccount...	Account Gr...	Market
WILCO INC	690 RIVER PARK DR	DANVILLE	Virginia	24540-5077	DANVILLE IND...	0002975525	---	---	Yes	Sold-to pa...	Logistics,Other

Customer Account Record: check the Account Group, My Account Registered, and Account number on one page

WILCO INC - Saved
Account · TCO Account Form

0002975525 Account Number Sold-to party pre-assigned # Account Group

Summary Contacts Purchases PowerMaps Install Checklist CRM Sales Team Account Details Related

ACCOUNT INFORMATION

MyAccount Registered

Parent Account ---

Account Name WILCO INC

Equipment

End User	Delivery Date	Serial Number	Machine Description	Sold To
	2/20/2002	613180-10065935	STRIP TRAK STRIPPER AP...	
	2/11/2002	613180-10064749	STRIP TRAK STRIPPER AP...	

No data available

- d. **What if an account group is not set up as a sold-to, where can I find the proper Customer Number?**
If the account is set up as ship-to and has had equipment purchases, you can find sold-to Customer Number from within the equipment detail.

Click on an equipment record:

On the left hand display, scroll to find the **Sold-To Name**. Click on the name to go to Sold-To account.

ecklist CRM Sales Team Account Details Relat

Equipment

End User

- 5/27/2021
T300-11011766
MODEL T300 SCRUBBER
- 5/19/2021
B7-11007843
BURNISHER, 690MM, ADC, 330AH [US P...
- 5/13/2021
1610-11010012
READYSpace WB, 240AH [US PW]

Last EHM Date	---
Original Sold-to	---
Customer Name	SUNBELT RENTALS
Customer Number	0005025790
End User Name	SUNBELT RENTALS
End User City	VENICE
Sold-to Account #	---
Sold To Name	SUNBELT RENTALS INC
Sold To City	CHARLOTTE

The Sold-To Customer Number will be in upper right corner.

SUNBELT RENTALS INC - Saved
Account · TCO Account Form

0003180382 Account Number Sold-to party pre-assigned # Account Group

Summary Contacts Purchases PowerMaps Install Checklist CRM Sales Team Account Details Related

4. **CRM Contact Record** – Listed below are the ways you can identify if a CRM contact has access to My Account.

All existing CRM contacts, that are registered My Account users, will have the **'My Account Registered'** field populated with "Yes" on their contact record.

Also, when newly registered users gain access to My Account, if their information does not exist in CRM, a contact record will be created and the **'My Account Registered'** field populated with "Yes".

'My Active Contacts' View: check the 'My Account Registered' field

MyAccount Registered	Full Name	Company Name
---	Greg Minor	SUNBELT RENTALS I...
Yes	JASON ALBINO	STERICYCLE INC
---	Willis Rodriguez	STERICYCLE INC
---	Jerry Seinfeld	SEINFELD- TEST
---	George Costanza	SEINFELD- TEST

Customer Contact Record: check the 'My Account Registered' field in the Summary Contact Information

JASON ALBINO - Saved
Contact - NA01 Contact Form

Summary | Contact Details | Related

CONTACT INFORMATION

MyAccount Registered

First Name * JASON

Last Name * ALBINO

Job Title Service Tech - FSM

Role ---

Company Name * STERICYCLE INC

Customer Account Record: check the 'My Account Registered' field on the Contacts tab in the Account form

STERICYCLE INC - Saved
Account - TCO Account Form

Summary | **Contacts** | Purchases | PowerMaps | Install Checklist | CRM Sales Team | Account Details | Related

CONTACTS

MyAccount Registered	Full Name	Created On	Last Touched On
Yes	JASON ALBINO	8/4/2022 11:03 PM	8/4/2022 11:03 PM
	Willis Rodriguez	3/9/2022 1:54 PM	3/9/2022 1:54 PM