



New Customer Setup Checklist

COMPANY INFORMATION

Company name:

Shipping Address:

Billing Address:

Telephone number:

Email Address:

CONTACT/ BILLING INFORMATION

- Main Contact Name, phone number and email.
- Accounting Contact Name, phone number and email.
- Receiving Contact Name, phone number and email.
- How are we going to get paid? Terms or credit card (first order will need to be Credit Card)
- Federal Tax ID
- Resale Number/ Certificate

ADDITIONAL INFORMATION

- Freight Terms (Who pays for freight)?
- Does this customer have multiple Shipping locations
- Email that invoices need to be sent to for payment?
- Do they require freight appointments or routing?
- Do they have access to a loading dock or do we need to schedule special equipment for deliveries (added cost)?
- Special shipping or processing instructions?