New Customer Set up

When setting up a new customer the following information is needed by credit to process your request in a timely manner (Projects and Distribution):

1. New Customer Application TriMark New Acct App (Customer) 10.5.21.pdf
   When should this be filled out?
   a. When it is a new customer
   b. When customer has been inactive and moved to a status 90 in Lawson making the account not useable without updated information.
   c. If a customer has sold their business to another entity.

2. W9 Form W9 form.pdf
   When should this be filled out?
   a. **Every time a New Customer Application is submitted.**

3. Tax Exempt certificates Tax Forms
   When do you need these forms?
   a. When your customer is a school or church and they are tax exempt
   b. If you are a Smallwares or disposable customer and you have special tax exemptions like a ST-12 etc.

4. All information given to our credit team at the time we are asking for a customer number to be set up will streamline the process and help reduce the back and forth. These forms should all be submitted to UECREDIT@trimarkusa.com.