



JANSAN CUSTOMER SET UP FORM

Customer/Prospect Name: _____

AFP Sales Consultant Name: _____

Is This A New Customer or a New Location for An Existing Customer?

GPO or Similar Affiliation - Is This Customer a Part of a GPO/Co-Op/Avendra/Buying Group/Other?

If so, which one(s).

Nancy to email Natalie Caceres.

Shipping Location(s)?

Where will we be delivering orders for this account and how are these locations related? (If there are many locations, you may attach an excel with the addresses and relevant information per location but explain their relationship here. We are trying to determine how to set up the account if it's complex.)

Parent Pricing - Does this account need to be linked to an existing Parent Pricing Account?

If so, indicate which one and explain why.

Parent Pricing - Do you believe a new Parent Pricing account needs to be created for this account?

If so, please indicate so and explain why.

A/R Parent - Does this account need to be linked to an existing A/R Parent?

If so, indicate which one and explain why.

A/R Parent - Do you believe a new A/R Parent account needs to be created for this account?

If so, please indicate so and explain why.

Tax Setup – Which of the following do you believe best describes the tax set up this customer should have?

Please explain check one and explain why.

- ☐ Account should be all taxable
- ☐ Account should be all tax exempt with tax certificate
- ☐ Account should have taxable and non-taxable ship-tos for every delivery location
- ☐ Other

Delivery Instructions/Requests?

You may include this information in an excel if there are multiple locations.

No Signature Available Upon Delivery/POD Photos Needed?

Will this customer have delivery locations where orders must be left in a designated area without a signature, with a photo taken as proof of delivery? If so, please provide drop-off instructions and the completed authorization form from the customer for us to leave the order without a signature.

Delivery Paperwork with No Prices Needed?

Do prices need to be omitted from the delivery paperwork? If omitted, the invoice for the delivery will be emailed on the next business day to the customer.

Web Ordering Access Required?

Does this customer require web ordering access? If so, please provide the names and email addresses of the users that would need access. Please also let us know of any specific web ordering requests you have for this customer (e.g., pricing not displayed, approver required, etc.).

Nancy to email this information to Natalie Caceres and Jorge Paez.

Additional Notes/Comments: