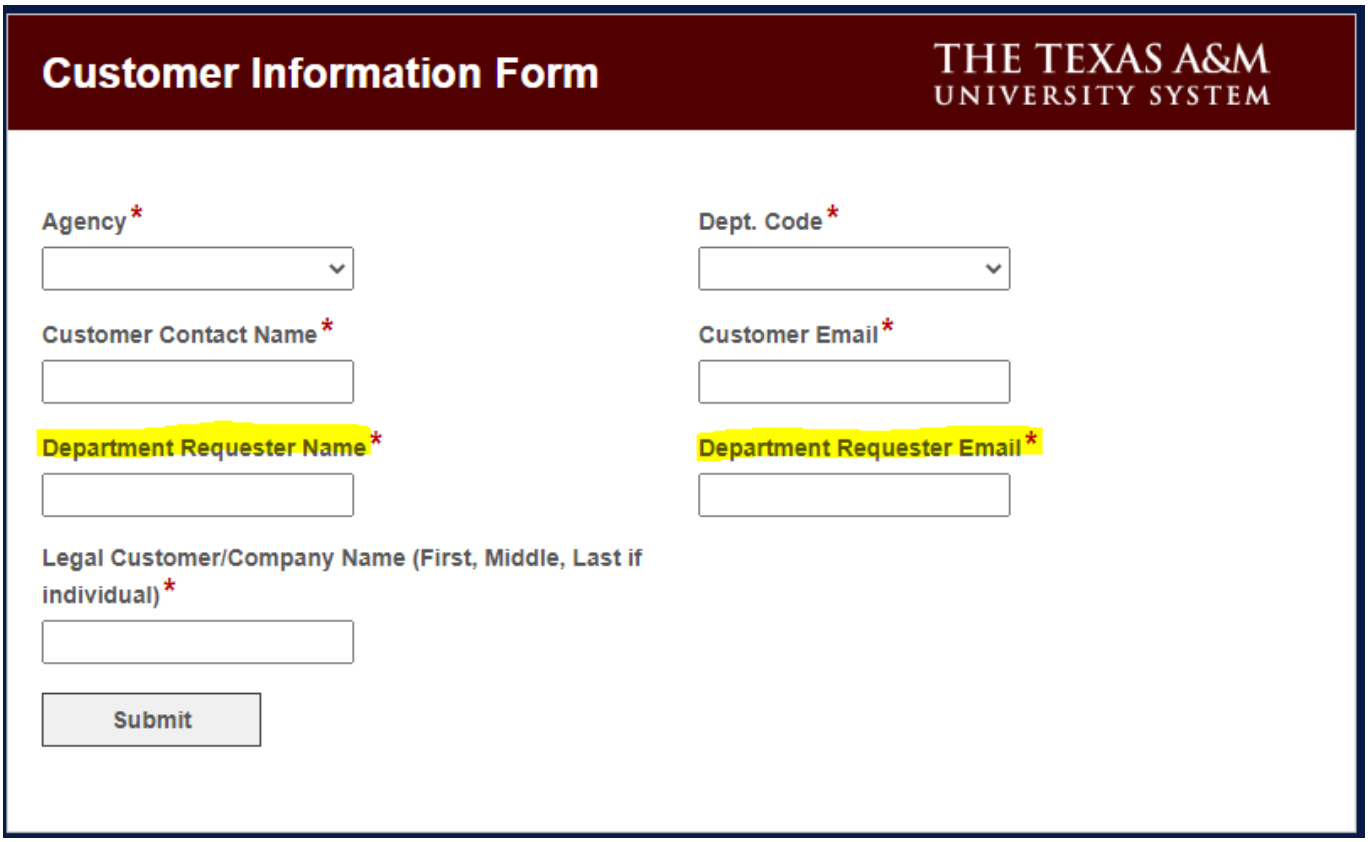
External Customers

1. Does your external customer already exist in Canopy with a 68 account number? If not you will need to fill out the information on this link https://it-lf-ecmf.tamu.edu/Forms/Initiate-Customer-Information-Form as the "department requestor" in order to obtain a 68 account number for this customer.



Customer Information Form

THE TEXAS A&M UNIVERSITY SYSTEM

Agency *

Dept. Code *

Customer Contact Name *

Customer Email *

Department Requester Name *

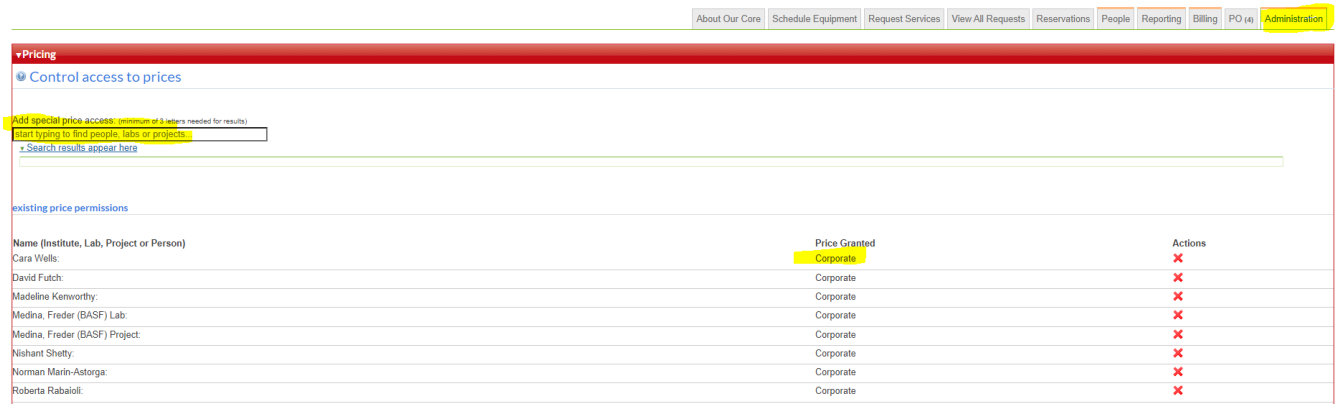
Department Requester Email *

Legal Customer/Company Name (First, Middle, Last if individual) *

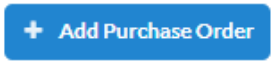
Submit

2. At this time you need to ask if they are tax exempt. If your customer is tax exempt you will need to fill out the form found here https://fmo.tamu.edu/sales-receivables/docs/sales-tax/exemptions.html and keep it on file for 7 years in your departmental billing account information.
3. Ask your external customer to register for an iLab account by following these instructions and creating a username/password.
    a. Navigate to the core page: https://tamu.corefacilities.org//service_center/show_external/4561
    b. In the upper-right-hand corner of the screen, hover over "Register", and select "Register for an iLab account".
    c. Complete the registration form.
    d. Receive a Welcome Email from iLab (typically within one business day) with login credentials.

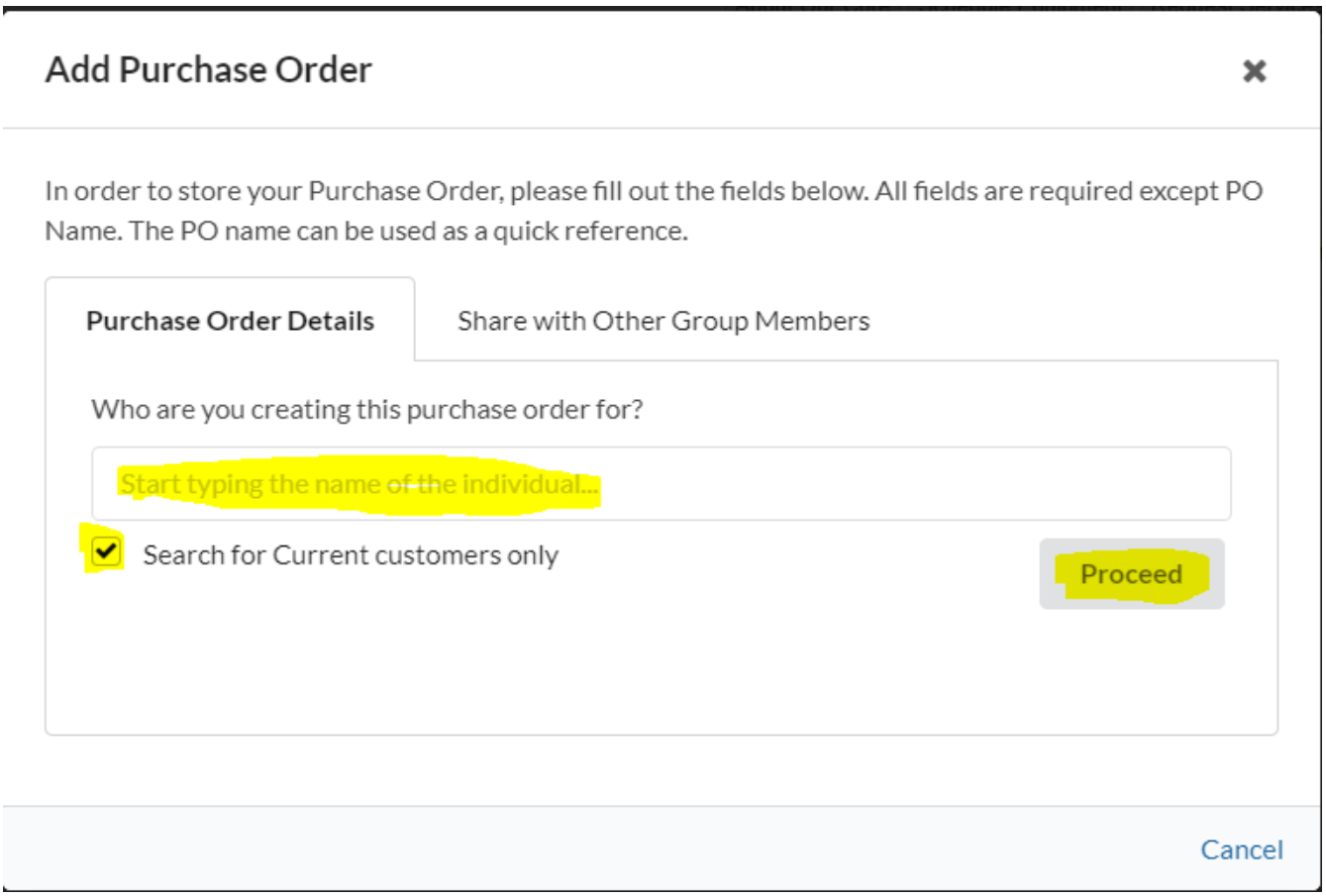
4. In iLab you will need to assign them “special pricing” in the Administration tab by searching for their name and assigning them the correct pricing type: Corporate, External Federal, External Academic, etc.



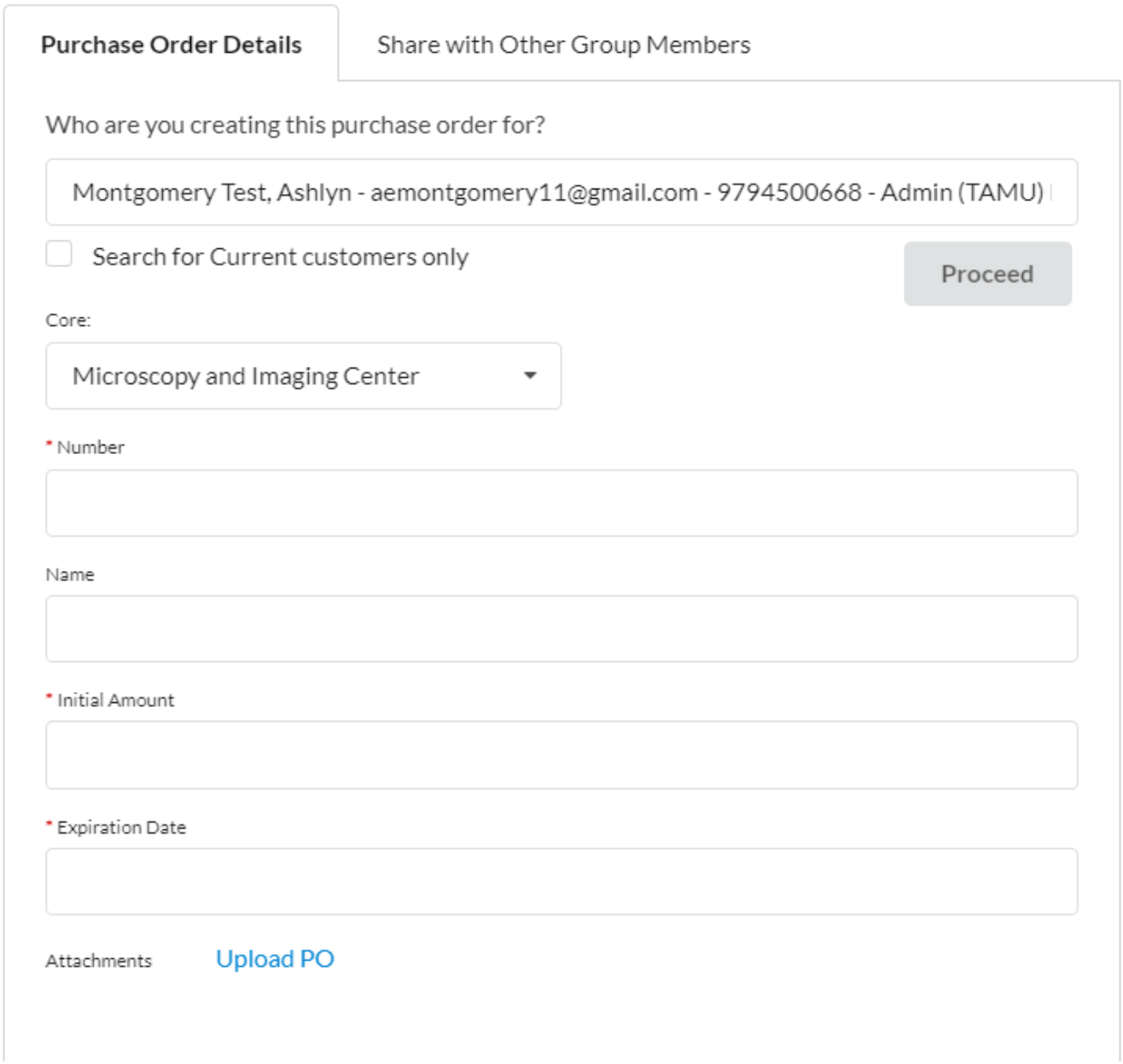
5. Create a PO for your customer.

   a. Under the PO tab in iLab, choose 

   b. Type the name of the external customer’s name, Un-check “Search for Current customers only”. Click “Proceed”.



c. Under “Number” please enter the 68 number assigned to the user followed by whatever you want to define this PO (date, external PO number provided by customer, project name, etc.) in the following format:
68-XXXXXX-XXXXX|other info
This format is the most important part of the external customer process if you want the charges to make it through FAMIS to the customer.
d. Give the PO a name, an initial amount (anything higher than what you expect the customer to charge), and an expiration date (any date further in the future).



e. Choose “Save and Approve”.
f. When you create reservations or requests the PO will appear in the payment information dropdown.

6. If your customer needs to be charged sales tax, you will need to run a billing event as usual but your billing department will need to submit a correction to the invoice to add sales tax to all taxable items and send it to the correct account. Please make sure your corporate customer knows to only pay the second invoice that is corrected with sales tax. Helpful sales tax information found here: https://fmo.tamu.edu/sales-receivables/docs/sales-tax/index.html