

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.

Administration

Control access to prices

Add special price access (minimum of 3 letters needed for results)

Start typing to find people, labs or projects

Search results appear here

existing price permissions

Name (Institute, Lab, Project or Person)	Price Granted	Actions
Cara Wells:	Corporate	✗
David Futch:	Corporate	✗
Madeline Kenworthy:	Corporate	✗
Medina, Freder (BASF) Lab:	Corporate	✗
Medina, Freder (BASF) Project:	Corporate	✗
Nishant Shetty:	Corporate	✗
Norman Marin-Astorga:	Corporate	✗
Roberta Raballo:	Corporate	✗

5. Create a PO for your customer.

+ Add Purchase Order

- 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”.

Add Purchase Order

In order to store your Purchase Order, please fill out the fields below. All fields are required except PO Name. The PO name can be used as a quick reference.

Purchase Order Details

Share with Other Group Members

Who are you creating this purchase order for?

Start typing the name of the individual...

☒ Search for Current customers only

Proceed

Cancel

- 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).

Purchase Order Details

Share with Other Group Members

Who are you creating this purchase order for?

Montgomery Test, Ashlyn - aemontgomery11@gmail.com - 9794500668 - Admin (TAMU) |

☐ Search for Current customers only

Proceed

Core:

Microscopy and Imaging Center ▼

* Number

Name

* Initial Amount

* Expiration Date

Attachments

Upload PO

- 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>