

Directions for Completing the Customer Information Sheet

The Instructional Materials Service/TAMU Customer Information Sheet must be completed per Federal Trade Commission's Red Flag Rule Requirements. Prior to providing goods and/or services, mandate compliance requires IMS have on file the completed form for each account your organization has with IMS. Only one form is needed per account. If you have any questions please call 979-845-6601. Note: this is not a credit application. It only serves to update our customer information and identify the procedure we must follow to process your order. Thank you.

Customer Name

List the name of the account with IMS on a separate sheet for each ISD account, activity fund, etc.

Federal ID Number

Tax exempt rules apply for each account; sales tax is charged if the Federal ID Number is not provided.

IMS Customer Number

IMS will continue to use the current customer numbers assigned to each account. If you are a new account, IMS will assign a customer number. Do not complete this section.

Customer Information

List the address you want the invoice sent.

List the contact person, that is, who is responsible for the order.

The person who approves the order cannot be listed as the person allowed to make orders.

Identify if a hard copy PO w/ instructions is required by this account. If no, identify all persons that can place a telephone order or call in an order without a purchase order.

If online purchases are allowed, please reference a purchase order and please send a copy of the PO.

Identify the accounts payable person and contact information.

Customer Representative

List the name, address, and title of the person designated to approve orders, sign and date the form.

The Department Signature will be completed by IMS.

Please FAX the completed form to 979-845-6608.

Thank you

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Instructional Materials Service

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