

CUSTOMER/VENDOR Master File Addition Request

Complete before adding new Customers or Vendors in JobBoss

☐ Customer

☐ Vendor

_____ **JobBoss ID** (First four letters of name preferred)

Name: _____

City, State: _____

Federal Tax ID# (Vendors Only): _____

Reason for addition:

Approved by: _____ **Added by:** _____

Notes:

- All new customers are set up on COD before credit approvals.
- All new vendors need a tax certificate.