

## New Customer Onboarding Checklist

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Contact:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Billing Email:** \_\_\_\_\_

**EIN #:** \_\_\_\_\_

**MC #:** \_\_\_\_\_ **DOT #:** \_\_\_\_\_

**Tax Exemption (if applicable):** \_\_\_\_\_ (Attach Form)

**Insurance:** \_\_\_\_\_ (Attach Form)

### Business/Credit References:

1. Business Name: \_\_\_\_\_

- Contact: \_\_\_\_\_
- Phone: \_\_\_\_\_
- Email: \_\_\_\_\_

2. Business Name: \_\_\_\_\_

- Contact: \_\_\_\_\_
- Phone: \_\_\_\_\_
- Email: \_\_\_\_\_

3. Business Name: \_\_\_\_\_

- Contact: \_\_\_\_\_
- Phone: \_\_\_\_\_
- Email: \_\_\_\_\_

### Bank Reference:

Name of Bank: \_\_\_\_\_

Bank Address: \_\_\_\_\_

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Bank Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Bank Contact Email: \_\_\_\_\_