



# Customer Onboarding Packet

Thank for your interest in X-Rite.

This information packet provides the following information:

Page 2    X-Rite Finance Requirements

Page 3    X-Rite Customer Data Form for Open Terms

Page 4    X-Rite Customer Data Form for Credit Card ONLY

Page 5    X-Rite Vendor Information & Payment Processing Options

Page 6    X-Rite W-9 Form

Page 7    X-Rite Purchase Order Requirements

## **X-Rite Finance Requirements for Open Terms**

- Complete the information on page 3 of this document. Be sure to include attachments:
  - ACH is our preferred method of payment. If applicable, please attach a copy of your completed ACH form.
  - Your current W-9 form.
  - Tax Exempt Certificates for your ship-to locations.

***NOTE: You may attach a copy of your own credit reference form if you do not fill out page 3 of this document.***

- If using a third-party portal, you need to work directly with them to complete your account setup before placing your order with X-Rite.
  - Examples of third-party portals:
    - Ariba
    - Coupa
    - Tungsten
    - Taulia
- Once all the finance requirements are complete, email the information, including attachments, to your Sales Representative and CC [Credit@xrite.com](mailto:Credit@xrite.com). Our Credit Team will begin the new account process.

***NOTE: To prevent delays, do not email this information to Order Management / Customer Service.***

- X-Rite Credit Team will notify you once your new account has been created.



## **Customer Data Form**

Company Name: [Click or tap here to enter text.](#)

D&B Number: [Click or tap here to enter text.](#)

Tax Exemption Certificate(s): Yes ☐ No ☐

If tax exempt, attach a copy of your tax-exempt certificate(s) for the state(s) product will ship to. Please sign, date and issue to X-Rite.

### **BILL TO ADDRESS**

Name: [Click or tap here to enter text.](#)

Address: [Click or tap here to enter text.](#)

City/ZIP-Postal: [Click or tap here to enter text.](#)

Country: [Click or tap here to enter text.](#)

### **SHIP TO ADDRESS**

Name: [Click or tap here to enter text.](#)

Address: [Click or tap here to enter text.](#)

City/ZIP-Postal: [Click or tap here to enter text.](#)

Country: [Click or tap here to enter text.](#)

### **CUSTOMER CONTACT INFORMATION**

#### **Buyer**

Name: [Click or tap here to enter text.](#)

Telephone #: [Click or tap here to enter text.](#)

Email Address: [Click or tap here to enter text.](#)

Customer Portal: [Click or tap here to enter text.](#)

(For Invoicing or Email to receive invoices electronically)

#### **Accounts Payable**

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

### **TRADE REFERENCES:**

#### **Trade Reference 1**

Company Name: [Click or tap here to enter text.](#)

Contact Name: [Click or tap here to enter text.](#)

Address: [Click or tap here to enter text.](#)

City/Zip Postal: [Click or tap here to enter text.](#)

Country: [Click or tap here to enter text.](#)

Email Address: [Click or tap here to enter text.](#)

Telephone #: [Click or tap here to enter text.](#)

#### **Trade Reference 2**

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

### **NOTICE TO CUSTOMERS:**

- **Please return this completed form to your X-Rite Sales Representative.**
- Open account terms may be provided dependent upon a review by the X-Rite Credit Department. Please attach trade references. **Standard Terms are Net 30 days.** Any terms outside of this must be approved by the X-Rite Credit Department prior to acceptance of an order.



## CREDIT CARD CUSTOMERS ONLY

### **Customer Data Form**

Company Name: [Click or tap here to enter text.](#)

Tax Exemption Certificate(s):      Yes ☐      No ☐

If tax exempt, attach a copy of your tax-exempt certificate(s) for the state(s) product will ship to. Please sign, date and issue to X-Rite.

### **BILL TO ADDRESS**

Name: [Click or tap here to enter text.](#)

Address: [Click or tap here to enter text.](#)

City/ZIP-Postal: [Click or tap here to enter text.](#)

Country: [Click or tap here to enter text.](#)

### **SHIP TO ADDRESS**

Name: [Click or tap here to enter text.](#)

Address: [Click or tap here to enter text.](#)

City/ZIP-Postal: [Click or tap here to enter text.](#)

Country: [Click or tap here to enter text.](#)

### **CUSTOMER CONTACT INFORMATION**

#### **Buyer**

Name: [Click or tap here to enter text.](#)

Telephone #: [Click or tap here to enter text.](#)

Email Address: [Click or tap here to enter text.](#)

#### **Accounts Payable**

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

### **NOTICE TO CUSTOMERS:**

Please return this completed form to your X-Rite Sales Representative



## **VENDOR & PAYMENT OPTIONS**

X-Rite Incorporated, 4300 44th ST SE Grand Rapids MI 49512 USA 1-800-248-9748

### **VENDOR INFORMATION X-RITE INCORPORATED**

D-U-N-S® Number: 00-602-6553

Employer Identification (TIN): 38-1737300

GST Number: 89892 1473 RT0001

### **PAYMENT PROCESSING INFORMATION**

#### **Check Payments**

X-Rite Incorporated

Lockbox 62750

62750 Collection Center Drive

Chicago, Illinois 60693-0627

#### **ACH Payment**

Bank of America

1401 Elm Street 2nd Floor

Dallas, Texas 75202

ACH/ABA Routing Number: 071923284

Account Number: 8765030744

Account Type: Checking

CTX Format

#### **Wire Transfer**

Swift: BOFAUS3N

222 Broadway

New York, NY 10038

Bank of America

Routing Number: 026009593

Account Number: 8765030744

#### **Remittance Email:**

[Accountsreceivable@xrite.com](mailto:Accountsreceivable@xrite.com) and [credit@xrite.com](mailto:credit@xrite.com)

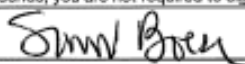
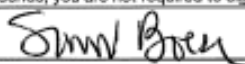
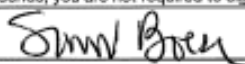
## X-Rite W-9

<b>Form W-9</b> (Rev. March 2024) Department of the Treasury Internal Revenue Service	<b>Request for Taxpayer Identification Number and Certification</b> Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.	Give form to the requester. Do not send to the IRS.
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**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	<table style="width: 100%;"> <tr> <td style="width: 65%;"> <b>1</b> Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)  <b>X-RITE INCORPORATED</b> </td> <td style="width: 35%;"></td> </tr> <tr> <td colspan="2"> <b>2</b> Business name/disregarded entity name, if different from above.         </td> </tr> <tr> <td colspan="2"> <table style="width: 100%;"> <tr> <td style="width: 65%;"> <b>3a</b> Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. 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See instructions. _____ <input type="checkbox"/> </td> </tr> <tr> <td colspan="2"> <table style="width: 100%;"> <tr> <td style="width: 60%;"> <b>5</b> Address (number, street, and apt. or suite no.). See instructions.  <b>4300 44TH STREET SE</b>  <b>6</b> City, state, and ZIP code  <b>GRAND RAPIDS, MICHIGAN 49512-4009</b> </td> <td style="width: 40%;"> <b>Requester's name and address (optional)</b> </td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <b>7</b> List account number(s) here (optional)         </td> </tr> </table>	<b>1</b> Name of entity/individual. An entry is required. 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<b>Part I Taxpayer Identification Number (TIN)</b>			
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later.			
<table style="width: 100%;"> <tr> <td style="width: 60%;"> <b>Social security number</b>  <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="width: 40%;"> <b>OR</b>  <b>Employer identification number</b>  <div style="border: 1px solid black; padding: 2px;">             3 8 - 1 7 3 7 3 0 0           </div> </td> </tr> </table>		<b>Social security number</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<b>OR</b> <b>Employer identification number</b> <div style="border: 1px solid black; padding: 2px;">             3 8 - 1 7 3 7 3 0 0           </div>
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<b>Note:</b> If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.			

<b>Part II Certification</b>			
Under penalties of perjury, I certify that:			
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and			
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and			
3. I am a U.S. citizen or other U.S. person (defined below); and			
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.			
<b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.			
<b>Sign Here</b>	<table style="width: 100%;"> <tr> <td style="width: 50%;">           Signature of U.S. person  </td> <td style="width: 50%;">           Date JANUARY 2, 2025         </td> </tr> </table>	Signature of U.S. person 	Date JANUARY 2, 2025
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they



## Purchase Order Requirements

- **To prevent delays** when submitting your orders, please include all the required information below on your Purchase Orders.
- **If your PO system cannot provide all the detailed information below, it must be included in the body of the email you submit when placing an order.**
- Email your orders/POs to your Sales Representative.

### **Check PO REQUIREMENTS**

\_\_\_\_\_ X-Rite Vendor/Supplier on Purchase Order (*X-Rite, Inc., 4300 44<sup>th</sup> Street SE, Grand Rapids, MI 49512*)

\_\_\_\_\_ PO Number

\_\_\_\_\_ Bill-To Name, Address

\_\_\_\_\_ Ship-To Name, Address, Contact Name & Email

\_\_\_\_\_ Email to receive Order & Shipping Confirmations

\_\_\_\_\_ Payment Terms (*Net 30, Credit Card, Check, Wire Transfer*)

\_\_\_\_\_ FOB (*Shipping Point or Customer Site*)

\_\_\_\_\_ Ship Method (*X-Rite uses FedEx or use your freight account including your account #*)

\_\_\_\_\_ Freight Terms (*Prepay-Add, Prepay, Collect when using your freight account*)

\_\_\_\_\_ Inco Terms (*EXW, FOB Destination, etc.*)

\_\_\_\_\_ Quantity for item(s) ordered

\_\_\_\_\_ Price for item(s) ordered

\_\_\_\_\_ Part Number for item(s) ordered (*include below if applicable*):

- Product configuration selections
- Software End User Contact Name/Email info
- Software Renewal Model(s) & Serial Number(s)
- Software Pantone Live, # of seats

\_\_\_\_\_ Tax Exempt Form for ship-to location if not already submitted to X-Rite

**If the following shipping information does not appear on your PO (or email) for orders shipping to the USA or Canada, X-Rite will default to the following terms:**

#### **USA**

Information:	Order will default to:
FOB:	Shipping Point
Ship Method:	FedEx-Parcel-Ground
Freight Terms:	Prepay & Add
Inco Terms:	EXW

#### **CANADA**

Information:	Order will default to:
FOB:	Shipping Point
Ship Method:	FedEx-Parcel-International Export Economy
Freight Terms:	Prepay
Inco Terms:	DDP