

Credit Application

Sales Customer Account Work Sheet

SECTION 1: SALES

Complete all fields and process to management for approval **Originator "Sales Person"**.

COMPANY NAME:	Originators name:
	Date:
Sales Faxed Credit Applications: YES / NO	Contact:
Date:	Title:
Notes:	
Address-1:	Company Web site:
Address-2:	<i>SAE Sales Suggested Setup defaults:</i>
City:	
State: Zip Code:	Cust Type: _____ Discount %: _____
Email Address:	Ship Via:
Phone:	Order Pending: YES / NO
FAX:	Send Literature: YES / NO
Business Type / Manufacturer Distributor of:	
Comments:	
Management Approval (Sales):	Date:
SECTION 2: CREDIT DEPARTMENT	
Update web data base contact: int.	Received Date:
Date:	
Assign Customer Number: _____	
New Customer ___ Re-instated ___ Old information attached ___	
Sent Credit Appls. Initial _____ Faxed _____ Mailed _____ Date:	
SAE Received Customer Appls: YES / NO	
Sales Order Pending: YES / NO	
If YES: SAE# _____ Approx Value \$ _____	
Literature data base status: CAT _____ IPF _____ QTY: _____	
Credit References submitted to Credit Manager: DATE:	
Comments:	
SECTION 3: CREDIT MANAGER	
	Date Approved:
Credit Terms:	Approved by:
Credit Amount: \$	(Signature Required)
Comments:	