

Customer Information & Credit Worksheet

Company Name _____
 Main Contact _____
 Address _____
 City _____ St _____ Zip _____
 Phone _____ Fax _____
 Email _____

Date _____
 Parent Company Name _____
 Address _____
 City _____ St _____ Zip _____
 Salesperson _____
 CSR _____

Type of Business _____

Years at Current Location _____

Incorporated? _____ Yes _____ No _____ If Yes, Year Incorporated _____

Annual Sales Volume _____

Bank Reference _____

Phone _____ Fax _____

Seller's Permit No./Resale Certificate No. (fill out form) _____

Trade References (List Three)

1)	Name	Address	Phone	Fax	Contact
2)	Name	Address	Phone	Fax	Contact
3)	Name	Address	Phone	Fax	Contact

For Internal Best Label Use Only

Verification of Bank
 When Account Opened _____ Average Balance _____

Verification of Trade References:

	#1	#2	#3
Payment Record			
Highest Recent Credit			
Present Balance			
# of Years Done Business			
Terms			
Amount Past Due			

Credit Approved _____
 Credit Denied _____
 Credit Limit _____
 Approved By _____
 Signature _____
 Date _____



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