



Salesperson/Branch Mgr: _____

Date: _____

NEW ACCOUNT SETUP CHECKLIST

Must be filled out by Salesperson or Branch Manager

Business Name: _____

Address: _____

City / State / Zip: _____

Business Phone: _____

Tappi Phone Number: _____

Tappi phone Number: _____

Tappi phone Number: _____

Fax: _____

Owner: _____

Phone: _____

Email: _____

Service Location: CPA CPC CPL CPT CPW

Does customer want CP Direct? Yes No

Does the customer want Webdocs? Yes No (If yes, must be Reg Weekly, Weekly Batch, or Monthly)

Taxable: Yes No

Resale Card Filled Out: Yes No* Resale card given to customer? Yes No

Terms: Reg Weekly Weekly Batch Monthly -These terms require a Credit Application to be dropped off.

Daily - Requires a Daily Account agreement dropped off. COD Prepaid CC

Temporary Credit: None Monthly – 999* Weekly – 499* Daily – 199*

* Appropriate Credit Application and Resale Card must be received within 7 days.

Special Notes: