

# Credit Application Instructions

## Section 1: Company Information

Please provide all company information requested: Company name, Dun & Bradstreet number, Doing Business As, Address, City, State, Zip, Phone, Fax, and Email.

Place an "X" in the box that applies to your Organizational status: Partnership, Corporation, or Sole Proprietorship.

Please also provide Incorporation State and Date, number of Employees and Computers, President and Vice President, and Annual Sales.

Another very important piece of information is the Accounts Payable information. Please list Contact, Phone, and Email.

## Section 2: Owner Information

This section must be completed for all Partnerships, Sole Proprietorships, and Corporations in business for three years or less.

Owner's full name, social security number, home address, city, state, and zip are required as well as Partner's full name, social security number, home address, city, state, and zip.

## Section 3: Bank Information

This section must be completed to receive a line of credit with Plan Express, Inc. All fields must be completed: Bank name, phone, address, city, state, zip, bank contact, account number and type (i.e. checking, savings, etc.).

## Section 4: Credit Card Information

This section is optional. Completion of this section is only needed if preferred method of payment is credit card. Please complete Name on card, card number, expiration date, and security code/check digits. We also offer the option for you to choose the frequency in which your credit card is billed. The options are: daily, weekly, every other week, or monthly. The monthly option allows you to choose the specific day of the month in which you would like your credit card to be billed. This can be advantageous for your cash flow. For example, if your billing cycle runs from the 13<sup>th</sup> to the 12<sup>th</sup> and we bill your card on the 13<sup>th</sup> or 14<sup>th</sup> of the month, you would essentially have 60 days to pay for those plans.

If you choose the Credit Card option a signature is required. Please sign, date and complete name and title.

## Section 5: Trade References

This is required information as well. Please complete each section or attach a bank reference page.



# CREDIT APPLICATION

<b>Section 1: Company Information</b>			
Company:		Duns#:	
DBA:			
Address:		City:	State: Zip:
Phone:		Fax:	
Email:			
Partnership:		Corporation:	Sole Proprietorship:
State of Incorporation:		Date of Incorporation:	
# of Employees:		# of Computers:	
President:			
Vice President:		Annual Sales:	
Accounts Payable Contact:			
Phone:		Email:	

<b>Section 2: Owner Information</b>			
Must be completed for all Partnerships, Sole Proprietorships, or Corporations in business for three years or less)			
Owner's Full Name:		Owner's SSN:	
Address:		City:	State: Zip:
Partner's Full Name:		Partner's SSN:	
Address:		City:	State: Zip:

<b>Section 3: Bank Information</b>			
Bank Name:		Phone:	
Address:		City:	State: Zip:
Contact:	Account #:	Account Type:	

**If preferred method of payment is Credit Card please complete the following section.**

<b>Section 4: Credit Card Information</b>			
Name on Card:		Credit Card#:	Exp: Check Digits:
Billing Frequency:	Daily	Weekly	Bi-Weekly Monthly Preferred Day to Apply Charges

The undersigned authorizes Plan Express to charge this credit card for all orders processed through the system.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

### Section 5: Trade References

Company:		
Type of Business:	Phone:	
Address:		
City:	State:	Zip:
Contact:	Account#:	
Company:		
Type of Business:	Phone:	
Address:		
City:	State:	Zip:
Contact:	Account#:	
Company:		
Type of Business:	Phone:	
Address:		
City:	State:	Zip:
Contact:	Account#:	

### Section 6: Terms & Conditions: Minimum Order Requirements

**Free Hosting of Private Plan Room Requirements:**

Orders generated from the Plan Room **MUST** meet or exceed the equivalent of two (2) complete sets of plans and specifications per project. The order(s) must be placed within sixty (60) days of the date the project is posted.

**Example:** If there are 40 drawings and no specifications for the project, then a minimum of 80 drawings **must** be ordered per posted project within 60 days of the posting. Orders may be cumulative. For instance, Sub-Contractor #1 orders 5 pages, Sub-Contractor #2 orders 25 pages, Sub-Contractor #3 orders 30 pages, Sub-Contractor #4 orders 22 pages. The total number of plans ordered from this plan room exceeds 80 drawings, and the minimum order requirement has been fulfilled.

**Services Included with your FREE Plan Room:**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Free FedEx or Airborne pick-up for first issues.*</li> <li>• Scanning or downloading of plans and specifications.</li> <li>• Posting plans and specifications to your private plan room.</li> <li>• Online viewer.</li> <li>• Highest quality printing.</li> <li>• Personalized transmittals with your company logo.</li> <li>• Automated ordering</li> </ul> | <ul style="list-style-type: none"> <li>• Free FTP upload of documents.</li> <li>• Indexing of plans and specifications.</li> <li>• Document management with revision control.</li> <li>• Tracking and reporting of orders.</li> <li>• Super discounted shipping rates.</li> <li>• Personalized plan room with your company logo.</li> </ul> |
|--|---|

*\* One time per project. Not an option for revision changes or addenda ONLY.*

I, the undersigned, hereby authorize bank, credit card, and credit references set forth above to release information to Plan Express, Inc., regarding my credit worthiness and financial condition. My signature below verifies and affirms that the information provided is true and correct. I have read and understand the above terms and conditions. I understand that if I do not meet the above requirements I will be charged for a minimum of two (2) sets of plans and specifications, excluding shipping. **We are unable to process ANY plans and/or specifications without this agreement on file.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Please return to: Plan Express, Inc., via fax: 801.760.8610 or email: [Sales@planexpress.net](mailto:Sales@planexpress.net)

**For Plan Express Use Only**

Sales Executive: \_\_\_\_\_ Account Manager: \_\_\_\_\_

Lead Source#: \_\_\_\_\_ Pricing: \_\_\_\_\_