



ALG Customer Load Sheet

Completed by: [Click here and type name]

Date:

Position: [Click here and type position]

New ☐

Prospect ☐

Update ☐

Name: [Click here and type customer name]

Address: [Click here and type address]

[Click here and type P. O. box, if applicable]

City: (25) [Click here and type city]

State: (2) [Click and type state]

Zip: [Click and type zip]

FEIN [Click here and type FEIN]

General Business Phone Number: [Click here and type (area code) + phone number]

Website: [Click here and type website address]

Order Contact Name: [Click here and type name]

Order Contact Phone Number: [Click here and type (area code) + phone number]

Order Contact E-mail: [Click here and type e-mail address]

Billing Contact Name: [Click here and type name]

Billing Contact Phone Number: [Click here and type (area code) + phone number]

Billing Contact E-mail Address: [Click here and type e-mail address]

Invoice E-mail: [Click here and type e-mail address]

Invoice Notes: [Click here and enter any applicable invoicing instructions]

Shipping Information: [If applicable, click here and enter carrier and account number]

Taxable: Yes ☐ No ☐ Exempt Number: [Click here and type #]

(If no, please provide sales tax exemption certificate)

Payment Method (ACH Preferred): [Click here and type payment method]

(If ACH, please provide any documents required for authorization)

Terms: Net 30

******* Failure to fill out this form in its entirety and provide the proper documentation can delay the processing of your order *******



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FOR CSR Use Only

CSR (if applicable): [Click here and type number]

Credit Requested / Limit: \$[Click here and type amount]

Salesperson #: [Click here and type number]

Customer Type Code: [Click here and type customer type] (See codes in EPMS)

Ship Via Code: [Click here and type ship via] (See codes in EPMS)

Ship Via Service: [Click here and type ship via] (See codes in EPMS)

Allowable Overs: [Click here and type amount] %

Allowable Unders: [Click here and type amount] %

ALG Terms for ALL customers are NET 30, unless this form is signed & approved by the General Manager.

Additional Notes:

Entered by: Date:

General Manager Approval (if required): Date:

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Accounting Use Only:

Miscellaneous Tab

- Mark check box for Active Customer
- Select correct option for Customer vs Prospect
- Check box beside PO Number is Mandatory on Invoices
- Check box beside Warn User when Order has a duplicated PO

Default Tab

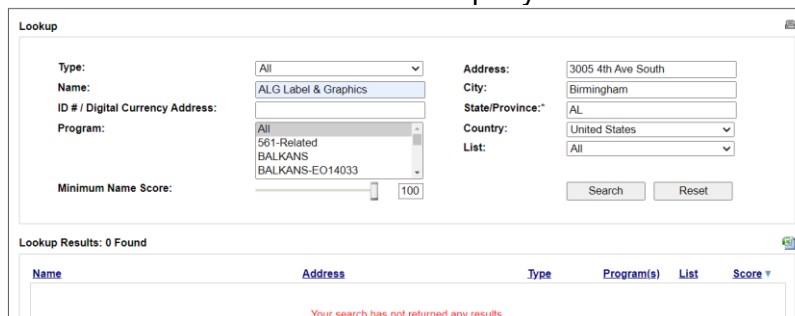
- Choose Custom Acknowledgement – Order Confirmation –ALG-With shipping
- Choose Custom Packing Slip – PackingSlipALG
 - Unless it is Steris then choose Steris Packing Slip
- Check box beside Don't automatically bill the full Allowable Overs
- Check box beside Include Overs in Total Quantity Shipped (not separate line)

Bill-To Tab

- Make sure correct billing address, e-mail address and invoice via are filled in.

If the customer is located in a foreign country, conduct an ADRS Compliance search.
The website is: <https://sanctionssearch.ofac.treas.gov/>

Enter name and address of the company and hit Search.



The screenshot shows a web form titled "Lookup" for conducting a sanctions search. The form contains several input fields and dropdown menus:

- Type:** A dropdown menu set to "All".
- Name:** A text input field containing "ALG Label & Graphics".
- ID # / Digital Currency Address:** An empty text input field.
- Program:** A dropdown menu with "All" selected. Other visible options include "561-Related", "BALKANS", and "BALKANS-EO14033".
- Minimum Name Score:** A slider control set to 100.
- Address:** A text input field containing "3005 4th Ave South".
- City:** A text input field containing "Birmingham".
- State/Province:** A dropdown menu set to "AL".
- Country:** A dropdown menu set to "United States".
- List:** A dropdown menu set to "All".

At the bottom of the form are "Search" and "Reset" buttons. Below the form, the results section shows "Lookup Results: 0 Found" and a table with headers: Name, Address, Type, Program(s), List, and Score. A red message states: "Your search has not returned any results."

If the company shows up on the list, contact General Manager.