

# How to Set Up and Manage Your Customer

In this session, we will discuss the importance of the credit application, gathering of credit information, the Five Cs of Credit, mercantile credit information, mainframe set up and the follow up required to manage the customer all the way to payment. The most important step in setting up a new customer is receiving a credit application.

The next important step will be verifying the entity, references and signatures. We need to know who our customer is and who we are selling to! It is here during the critical account set up process where we need to confirm that all of our Ts are crossed and our Is are dotted. We encourage each of the participants to bring in examples good or bad of credit applications to share with the credit community.

## About the Instructor

George A. Schnupp, CCE, is the U.S. Director of Credit at Anixter Inc., and has 28 years of experience in the credit field. Mr. Schnupp is also an instructor for NACM Midwest, William Rainey Harper College and the National Association of Credit Management's Mid-Career School.

**CEU Points and CCE Recertification Points are Available for This Course**



## Registration

**Date:** Tuesday, September 28, 2010

**Time:** 8:30 a.m. – noon

*(Continental breakfast served at 8 a.m.)*

**Location:** NACM Midwest, 3005 Tollview Drive, Rolling Meadows, IL

**Cost:** \$149 members, \$298 non-members

*(Only one coupon is valid.)*

Name \_\_\_\_\_ Member # \_\_\_\_\_

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**Check**—Payable to NACM Midwest and mail to: 3005 Tollview Drive, Rolling Meadows, IL 60008

**Credit Card**—For security reasons, please do not fax your credit card number. Fax this registration form to 636-680-9219, and call Kathy Berendsen at 800-935-6226 ext. 6410 to make your payment.

**All payments must be received one week prior to class start date.**

Cancellation Policy: Cancellations must be received in writing, via fax, e-mail or mail, no later than one week prior to the class date to qualify for a full refund. Cancellations received later than one week prior to the class date DO NOT qualify for a refund of registration fees. Sorry, phone cancellations cannot be honored. A 20% surcharge applies to late registrations and rebooking. If you have any questions, please e-mail [info@nacmconnect.org](mailto:info@nacmconnect.org).

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