



Central Welding Supply and Pacific Welding Supplies Customer Account Transfer / Duplication Program Instructions

All Central and Pacific Staff –

If and when you have a request from an existing open account customer to be able to conduct business, pick up supplies, or officially transfer their account from Central to Pacific or vice versa we have set up some simple steps to allow both the Pacific and Central offices to communicate all pertinent account information so that we can have duplicate matching accounts (to the extent that they can match up) in both the Pacific Computers Unlimited system, and the Central Dataweld system.

The process is easy: Just download or print the attached form, which will be available on both companies' homepage for quick reference. Fill out the top of the form as completely as possible, and submit, fax, or email that form to your company's designated coordinator.

Both coordinators will then communicate and transfer all pertinent information needed to duplicate the customer masterfile information, special pricing, special taxing, cylinder rental, blanket purchase orders, surcharges, delivery charges, and any other customer specific information and make sure that the accounts in both C-U and Dataweld are as close to a match as possible.

Once set-up and reviewed the new account information will be transmitted back to the requesting staff, to sales and operations managers of the requesting staff, to the newly assigned branch location and newly assigned associated staff, and ultimately to the customer in the form of a welcome letter.

The steps and some of the specific information items being transmitted is listed in the lower section of the form (that is for Smokey Point and Tacoma office use only).

Should you spot any deficiencies or hear any concerns from the customer requesting the account transfer and set-up, please contact your program coordinator, or forward the customer to speak to that coordinator directly to resolve any issues or update for any new or changed information.

All coordination regarding setting up and/or transferring existing open accounts needs to be channeled through the following two team members:

Central Welding Supply Co Inc
Marnie Miller
360 454-5540 Office
360 651-1957 Fax
marniemiller@centralwelding.com

Pacific Welding Supplies LLC
Jana Wojciechowicz
253 830-2219 Office
253 572-5311 Fax
wojciechowicz@pacificwelding.com

This program only works if everyone does their part to communicate as much as possible in regards to specific account information, customer intent, and anything else that is pertinent to the reasons a customer needs or wants to buy from the other operating company. Please do as much legwork as possible such that when both coordinators work to match up these open accounts in both Central's and Pacific's system we don't miss important information.

Thanks for your help!

Marnie Miller
Asset Manager
Central Welding Supply Co Inc
360 454-5540 Office
360 651-1957 Fax
marniemiller@centralwelding.com



Customer Account Transfer / Duplication Program



Date of Request _____

Staff Making Request _____ Central Pacific

From Branch Location _____

Account Name _____

Primary Account # _____ Central Pacific

(for clarity, staff submitting this form should fill out as much of the box below as possible)

Complete Legal Name _____			
Street Address _____	City _____	State _____	Zip _____
Billing Address _____	City _____	State _____	Zip _____
Phone # _____	Fax # _____		
Primary Payables Contact _____	Phone # _____	Fax # _____	
Email Address _____			

Smokey Point and Tacoma Office Use Only

Office Staff Constructing New Account _____

Newly Assigned Acct # _____

Please Mark That The Following Items Were Transferred or Addressed:

- Ship-To Accounts (if applicable)
- Credit Status (COD, Credit Hold, etc)
- Tax Rates and/or Special Taxing
- Blanket Purchase Orders (if applicable)
- Reseller Permit Copy / Resale Number (if applicable)
- Federal ID Number
- On-File Credit Application, Credit Information, Credit Limits
- Cylinder Records / Gas Pricing
- Cylinder Rental Rates
- Delivery Charges
- Surcharges (if applicable)
- Hardgoods Pricing / Discount Structure

New Account Primary Branch Location _____

New Account Assigned Salesperson _____

New Account Information Transmitted To:

- Newly Assigned Branch and Sales Staff
- Submitting Staff / Division
- Welcome Letter Sent To Customer

