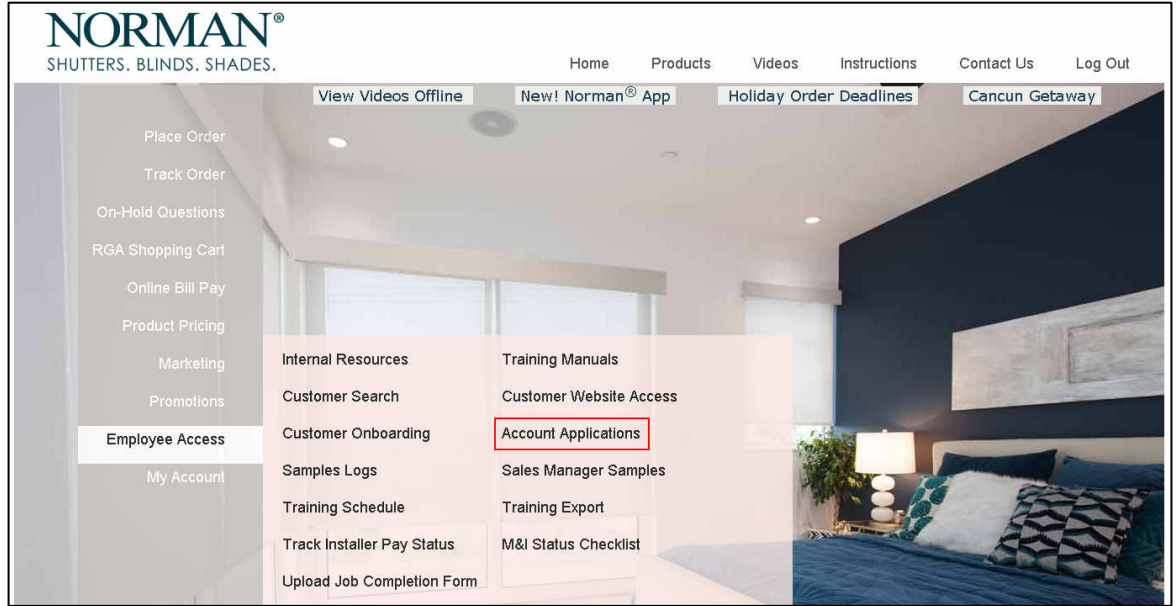
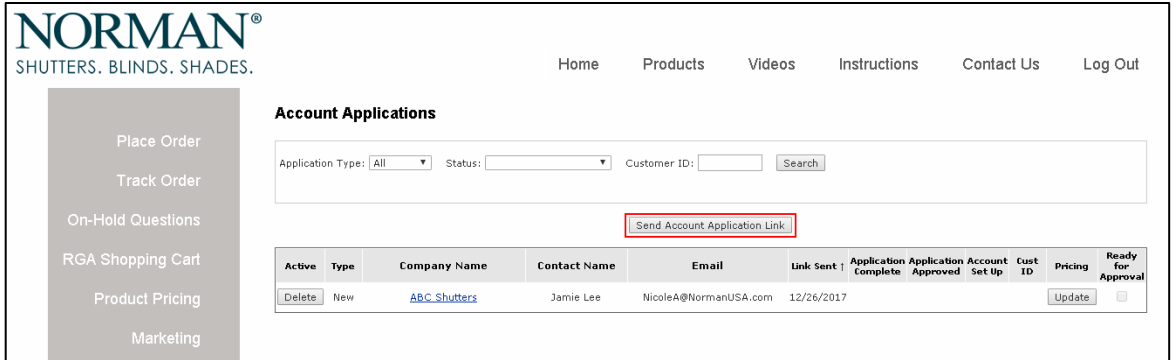


Subject: Full Account Application Process

To start, the sales manager must log into the website, go to Employee Access, and click on Account Applications.



To send an account application link, the sales manager must click on "Send Account Application Link".



Then, the sales manager must select the application type.

New: For new customers

Update: For existing customers who need updates to their account (e.g. legal name change, etc.)

Reopen: For customers whose accounts are closed

Transfer: For customers who have moved (i.e. changed RBCs)

The screenshot shows the Norman Shutters website interface. The top navigation bar includes 'Home', 'Products', 'Videos', 'Instructions', 'Contact Us', and 'Log Out'. The main content area is titled 'Account Applications'. A modal window titled 'Send Account Application Link' is open, displaying a form with the following fields: 'Account Application' (radio buttons for 'New Customer', 'Update Existing Customer', 'Reopen Account', 'Transfer Account'), 'Company Name' (text input: 'Davis Shutters'), 'Contact Name' (text input: 'Lily Davis'), 'Email' (text input: 'lilydavis@gmail.com'), 'Business Type' (dropdown menu: 'DEALER/RETAILER'), and 'State' (dropdown menu: 'FLORIDA'). Below the form are two buttons: 'Send Link' and 'Send Link and Open Application'. To the right of the modal, there is a table with columns 'Cust ID', 'Pricing', and 'Ready for Approval', and an 'Update' button.

Then, the sales manager will need to enter the customer's information, including the company name, contact name, email address, business type, and state that the customer is located in.

Once completed, there are two options.

1. Send Link: Send account application link to the customer

2. Send Link and Open Application: Send the account application link to the customer and open the account application to fill it out with the customer

This screenshot is identical to the one above, but with red boxes highlighting the 'Send Link' and 'Send Link and Open Application' buttons at the bottom of the modal window.

Once an account application link has been sent, the customer will appear in the account application queue.

The account application link will expire 10 days after the day it was sent. The sales manager will be sent a reminder email if the customer has not completed the application after a week.

The screenshot shows the NORMAN SHUTTERS. BLINDS. SHADES. website. The navigation menu includes Home, Products, Videos, Instructions, Contact Us, and Log Out. A sidebar on the left contains links for Place Order, Track Order, On-Hold Questions, RGA Shopping Cart, Product Pricing, Marketing, Promotions, and Employee Access. The main content area is titled "Account Applications" and features a search form with fields for Application Type (set to All), Status, and Customer ID, along with a Search button and a "Send Account Application Link" button. Below the search form is a table of active applications:

Active	Type	Company Name	Contact Name	Email	Link Sent	Application Complete	Application Approved	Account Set Up	Cust ID	Pricing	Ready for Approval
<input type="checkbox"/>	New	ABC Shutters	Jamie Lee	NicoleA@NormanUSA.com	12/26/2017					<input type="button" value="Update"/>	<input type="checkbox"/>
<input type="checkbox"/>	New	Davis Shutters	Lily Davis	lilydavis@gmail.com	12/26/2017					<input type="button" value="Update"/>	<input type="checkbox"/>

The screenshot shows an email titled "Account Application Reminder: Davis Shutters - Message (HTML)". The email header includes: From: Norman Window Fashions, To: Davis Shutters, Cc: (empty), Subject: Account Application Reminder: Davis Shutters, and Sent: Tue 1/27/2015 1:28 PM. The body of the email contains the following text:

The following account application has not been completed and expires on 2/6/2015/2015 (in 3 days).
Please follow up with the prospective customer.

Company Name: Davis Shutters
Contact Name: Lily Davis
Email: lilydavis@gmail.com


The customer will receive an email with a link to their account application.

The screenshot shows an email titled "Norman Window Fashions Account Application: Davis Shutters - Message (HTML)". The email header includes: From: SalesSupport@NormanUSA.com, To: Davis Shutters, Cc: (empty), Subject: Norman Window Fashions Account Application: Davis Shutters, and Sent: Tue 12/26/2017 12:24 PM. The body of the email contains the following text:

Dear Davis Shutters,
Thank you for your interest in Norman Window Fashions. Please click on the link below to begin the account application process.
Important: The account application link will expire on 11/5/2017. Please complete the application prior to the expiration date. If the link has expired, please contact your sales representative for further assistance. Do not reply to this email, as you will not receive a response.
<http://www.Normanusa.com/NormanAccountApplications1.asp?CustID=15002237>
Sales Support Team: John Doe
Email Address: JohnDoe@NormanUSA.com
Norman Window Fashions
www.normanusa.com

Account Application

Step 1: On the first page, the customer must enter the company information.

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Account Application

Step 1 of 5: Company Information * required

Step 1: Company Information

Step 2: Principals
Step 3: Email Notifications
Step 4: Online Access
Step 5: Confirmation

* Legal Business Name (e.g. Shutters for Less):

DBA:

* Company Address:

* City: * State: * Zip Code:

* Ship To Address:

* City: * State: CALIFORNIA * Zip Code:

* Ship To Address Contact:

* Phone No: -- Alternate Phone No: --

* Fax No: -- * Company Email:

* Federal Tax ID#:

* Company Type: Corporation Partnership Sole Proprietorship Other

* Business Start Date:

* Annual Sales: \$

* Has your company or any related PRINCIPAL(s) ever filed for bankruptcy? If yes, please explain.
 No Yes

* Has a tax lien or civil suit been filed against your company within the last 6 years? If yes, please explain.
 No Yes

* Has your company purchased Norman branded products within the past 24 months? If yes, from whom?
 No Yes



Norman Window Fashions Resale Certificate Form

Option 1: Print and Upload Document(s)
*Please print and upload a copy of the Norman Window Fashions resale certificate form (all states).
 No file chosen

Option 2: Print and Fax Document(s)
- Please print a copy of the Norman Window Fashions resale certificate form
- Indicate appcode 15002261 on the form
- Fax the form to (866) 228-3689
 I will fax my resale document(s) to (866) 228-3689 and understand that I will be charged tax on any/all orders placed until the form is received and processed.

Option 3: Opt Out
 I choose not to upload resale certificate documentation and understand that I will be charged tax on any/all orders placed.

Optional: Personal Guaranty
For Net 30 terms, please print and upload a copy of the personal guaranty.
 No file chosen

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Document Uploads

Documents can be printed and uploaded using the print and upload buttons.

Resale Certificates

Option 1: Print & upload
Option 2: Print & fax
Option 3: Opt out & be charged tax on orders

Note: Resale certificate requirements are determined by the state they reside in.

Personal Guaranty

Customer must print and upload a personal guaranty form in order to receive Net 30 payment terms.

Norman Window Fashions Resale Certificate Form

Option 1: Print and Upload Document(s)

*Please print and upload a copy of the Norman Window Fashions resale certificate form (all states).

No file chosen

Option 2: Print and Fax Document(s)

- Please print a copy of the Norman Window Fashions resale certificate form
- Indicate appcode 15002261 on the form
- Fax the form to (866) 228-3689

I will fax my resale document(s) to (866) 228-3689 and understand that I will be charged tax on any/all orders placed until the form is received and processed.

Option 3: Opt Out

I choose not to upload resale certificate documentation and understand that I will be charged tax on any/all orders placed.

Optional: Personal Guaranty

For Net 30 terms, please print and upload a copy of the personal guaranty.

No file chosen

Resale Certificate Requirements by State

Arizona: 5000 Transaction Privilege Tax Exemption Certificate

Colorado: Sales Tax License & DR 0563 Sales Tax Exemption Certificate

Florida: Florida Annual Resale Certificate for Sales Tax

Illinois: CRT-61 Certificate of Resale

Nevada: Nevada Resale Certificate

New Jersey: New Jersey Form ST-3

Texas: 01-339 Texas Sales and Use Tax Resale Certificate


Washington: Washington Reseller's Permit

Virginia: ST-10 Sales and Use Tax Certificate of Exemption

California and All Other States: Norman Resale Certificate Form

Step 2: Customer must enter information regarding the company's principals.

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Account Application

Step 1: Company Information
Step 2: Principals *required
Step 3: Email Notifications
Step 4: Online Access
Step 5: Confirmation

Step 2 of 5: Principals

* Name of Primary Principal:

* Title of Primary Principal:

* Phone #:

* Cell #: * Email:

* Address:

* City: * State: * Zip:

Name of Secondary Principal:



Title of Secondary Principal:

Phone#:

Cell#: Email:

Address:

City: State: Zip:

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Step 3: Next, the customer must enter the email addresses that they would like to have on file for their product pricing security code and email notifications.

Note: The website will default the principal's information for the product pricing code and email notifications.

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Account Application

Step 1: Company Information
Step 2: Principals
Step 3: Product Pricing Security Code & Email Notifications * required
Step 4: Online Access
Step 5: Confirmation

Product Pricing Security Code
Important: Please enter the name and email address of the person who should receive the account's product pricing security code, which can be used to view product pricing on the website.

* Contact: Email Address:

Marketing Announcements

Name	Email Address	Add User
* Lily Davis	lilydavis@gmail.com	<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Save For All"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Save For All"/>

On Hold Questions

Name	Email Address	Add User
* Lily Davis	lilydavis@gmail.com	<input type="button" value="Update"/> <input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

Order Confirmations

Name	Email Address	Add User
* Lily Davis	lilydavis@gmail.com	<input type="button" value="Update"/> <input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

Invoices & Statements

Name	Email Address	Add User
* Lily Davis	lilydavis@gmail.com	<input type="button" value="Update"/> <input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

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Step 4: Customer must enter the users to receive online access to the Norman website.

Note: The account application will default to include the principal for full website access.

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SHUTTERS. BLINDS. SHADES. Customer Care

Account Application

Step 1: Company Information
Step 2: Principals
Step 3: Email Notifications
Step 4: Online Access (for Authorized Representatives) * required
Step 5: Confirmation

Name	Email Address	Security Level	Add User
* Lily Davis	lilydavis@gmail.com	99 - Full Access	<input type="button" value="Update"/> <input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

Website Access Level Chart

Access To:	Level 1	Level 3	Level 2	Level 9	Level 99
View Order Pricing	✓	X	✓	✓	✓
RGA Shopping Cart	✓	✓	✓	✓	✓
Track Order	✓	✓	✓	✓	✓
Enter Order		✓	✓	✓	
View Order Queue		His/her own orders only	His/her own orders only	Orders placed by Level 2 & 3 and his/her own orders	All orders
Check Out Orders		X	X	Orders placed by Level 2 & 3 and his/her own orders	All orders
Marketing Resources		✓	✓	✓	✓
RGA Confirmations		✓	✓	✓	✓
Change My Password		✓	✓	✓	✓
Invoices & Statements			✓	✓	✓
Payment History			✓	✓	✓
On-Hold Questions				✓	✓
View Product Pricing				Only with security code	Only with security code
Online Bill Pay				If enrolled	If enrolled
View & Apply Credits				✓	✓
Norman Rewards				✓	✓
Enroll for & Maintain Online Bill Pay					✓
My Account Settings					✓

If you have any questions regarding the website access levels available, please contact your customer service representative for assistance.

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Step 5: Customer must read the Norman Window Fashions terms and conditions, as well as the policies and logo and trademark guidelines. Then, the customer must check both boxes to indicate that they have read and agree to the conditions.

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Account Application

Step 5 of 5: Confirmation

Step 1: Company Information
Step 2: Principals
Step 3: Email Notifications
Step 4: Online Access
Step 5: Confirmation

All orders placed under this account are the responsibility of the named principal(s) even if there is a sale or transfer to new ownership of the named company. If there is a sales or transfer to new ownership of the named company, Norman Window Fashions & Its Affiliates, will set up a new account for the new owner after due notification from all parties and subsequent application for account and credit from the new owner.

I authorize Norman Window Fashions & Its Affiliates to obtain credit and financial information from any source at any time, which may include a report from a credit-reporting agency. I agree to pay in full for all products ordered or services rendered to, or at the request of, the undersigned in accordance with the terms of each invoice. In addition to personally guaranteeing full payment, I agree to pay Norman Window Fashions & Its Affiliates for all orders and resulting costs and expenses of cancellation or changes of an order.

In the event the account is turned to a collection agency or attorney, I agree to pay all collection costs, court costs, and attorney fees in addition to all other sums due. All disputes, claims or actions or proceedings arising directly or indirectly, shall be litigated at the election of Norman Window Fashions & Its Affiliates only in courts whose sites are within the County of Los Angeles, California, and the undersign hereby submits to the jurisdiction of any state or federal court located within the County of Los Angeles, California. The undersigned waives any right which he/she/they may have to transfer or change the venue of any litigation brought against the undersigned by Norman Window Fashions & Its Affiliates. Payment terms are Pre-Payment by ACH until further notice.

- I have carefully read the Norman Window Fashions [Policies and Logo and Trademark Guidelines](#) and hereby agree to them.
- I warrant that the above conditions have been carefully read and hereby agree to them.
- I certify that I am the owner and/or authorized officer of asdf.

Name: Title: Principal

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Once the application has been submitted, a confirmation page and email will let the customer know that their application has been successfully submitted.

The customer will also receive an email informing them that their application will be processed shortly.

Completed Account Application for Norman Window Fashions: Davis Shutters - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward

From: SalesSupport@NormanUSA.com Sent: Tue 12/26/2017 12:33 PM
To: Davis Shutters
Cc:
Subject: Completed Account Application for Norman Window Fashions: Davis Shutters

Dear Davis Shutters,

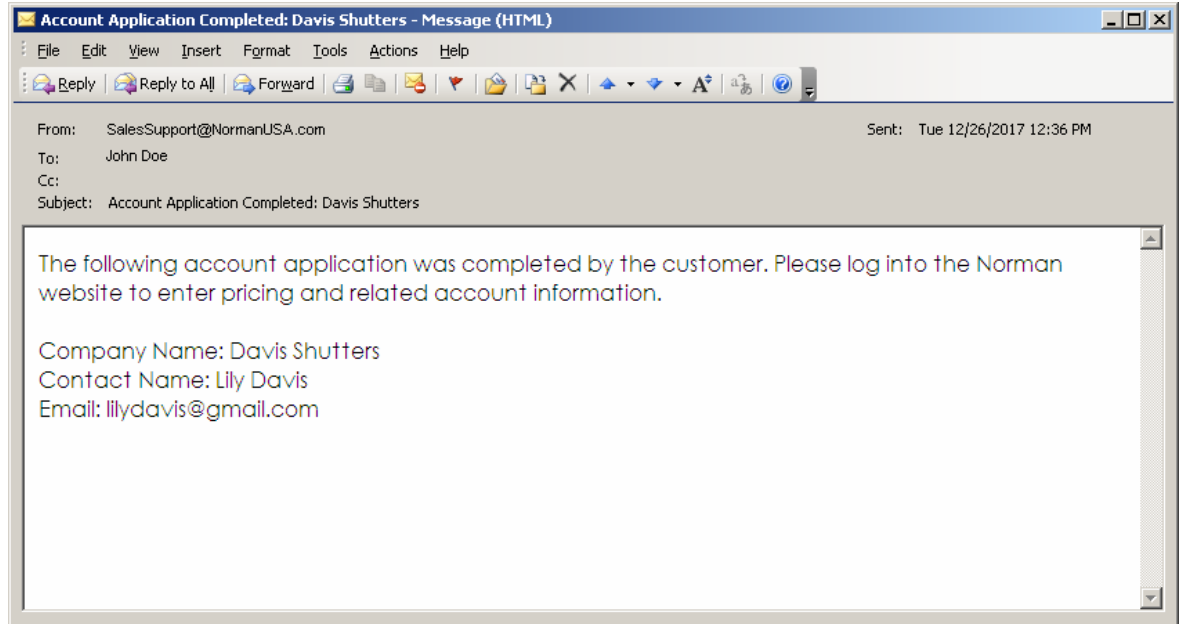
Thank you for completing the Norman Window Fashions account application. We will process your application and contact you shortly.

In the meantime, please feel free to contact your sales representative with any questions or concerns. Do not reply to this email, as you will not receive a response.

Sales Support Team: John Doe
Email Address: JohnDoe@NormanUSA.com
Phone No: 866-667-6268

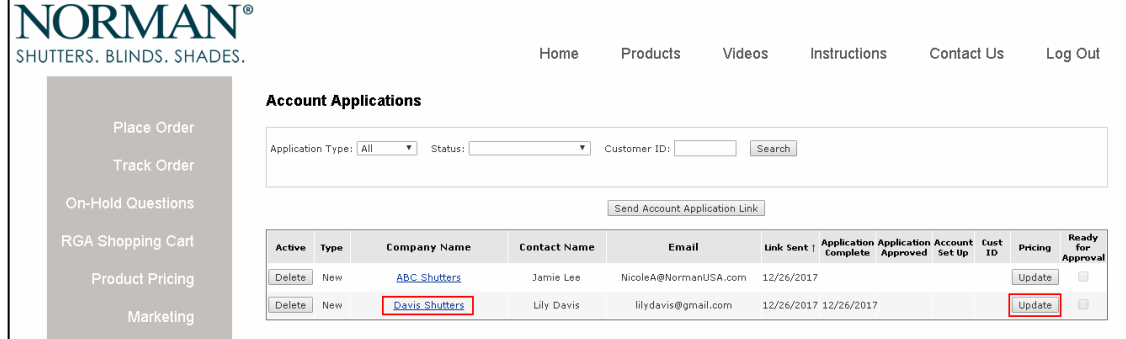
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Sales managers will also receive another email reminding them to fill out pricing on the website.



When an account application has been completed, a date will appear in the Application Complete column.

With that, sales manager can now:
 1. Click on the company name link to view the completed account application
 2. Click "Update" in the Pricing column to enter or update the customer's pricing and payment terms



Example of a completed account application

Note: Uploaded documents (such as resale certificates and personal guaranties) can be viewed by clicking on the blue, underlined links.

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Account Application: Davis Shutters

Account Type: New Customer
Contact: Lily Davis
Email Address: lilydavis@gmail.com
Business Type: Dealer/Retailer
State: AR ARKANSAS
Sales Manager: Johnny Dales

Miscellaneous Documents

Resale Certificate: [Resale10000123.doc](#)
Personal Guaranty:

Company Information

Legal Business Name: Davis Shutters
DBA: n/a
Federal Tax ID#: 78461234
Company Type: Corporation
Business Start Date: 3/12/1984
Annual Sales: \$999,999

Company Address: 1234 Norman Street, Santa Fe Springs, CA 90670
Ship To Address: 1234 Norman Street, Santa Fe Springs, CA 90670
Phone No: 562-555-1234
Alternate Phone No: 562-555-4321
Fax No: 562-555-1000
Company Email: davisshutters@gmail.com

Has your company or any related PRINCIPAL(s) ever filed for bankruptcy?

No

Has a tax lien or civil suit been filed against your company within the last 6 years?

No

Has your company purchased Norman branded products within the past 24 months?

No

Principals

Name of Primary Principal: Lily Davis
Title of Primary Principal: Owner
Phone #: 562-555-1234
Cell #: 562-555-2224
Address: 1234 Norman Street, Santa Fe Springs, CA 90670

Name of Secondary Principal:

Title of Secondary Principal:

Phone #:

Cell #:

Address:

Email Notices for Authorized Representatives

Marketing Announcements:

Name	Email Address
Lily Davis	lilydavis@gmail.com

On Hold Questions:

Name	Email Address
Lily Davis	lilydavis@gmail.com

Order Confirmations:

Name	Email Address
Lily Davis	lilydavis@gmail.com

Invoices & Statements:

Name	Email Address
Lily Davis	lilydavis@gmail.com

Online Access for Authorized Representatives

Name	Email Address	Level
Lily Davis	lilydavis@gmail.com	9

Example of the application pricing and payment terms

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Account Applications

Place Order
Track Order
On-Hold Questions
RGA Shopping Cart
Product Pricing
Marketing
Promotions
Employee Access
My Account

Has the customer purchased Norman products within the last 24 months? Yes No

	Price Groups	Payment Terms	Credit Limit
Shutters: Base	MCS14 MW T3	50 Prepayment/Net 15	\$3000
Shutters: Surcharge	MCS10 NIL		
Blinds	B31 Blinds .31	Net 15	\$2000
Shades	C31 Shades .31		
Component			
Contract			
Samples/Parts		Net 15	
BB PureVu Shutters			
WinJAM			
Installation Fee Tier	MC Installation Group 1		

* If the customer would like to request for net terms, please submit the Individual Personal Guaranty.

Measurer ID:
 Installer ID:
 Resale Certificate:
 Collect Tax on Account (Builder/Misc. and Account): Yes No
 Notes:

Close Save

When the customer's information and pricing has been reviewed, the sales manager will check the "Ready for Approval" checkbox.

If the application has default pricing and payment terms, the application will be automatically approved.

If pricing or payment terms were changed, an email will be sent to notify the GM that an account application is ready for approval.

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Home Products Videos Instructions Contact Us Log Out

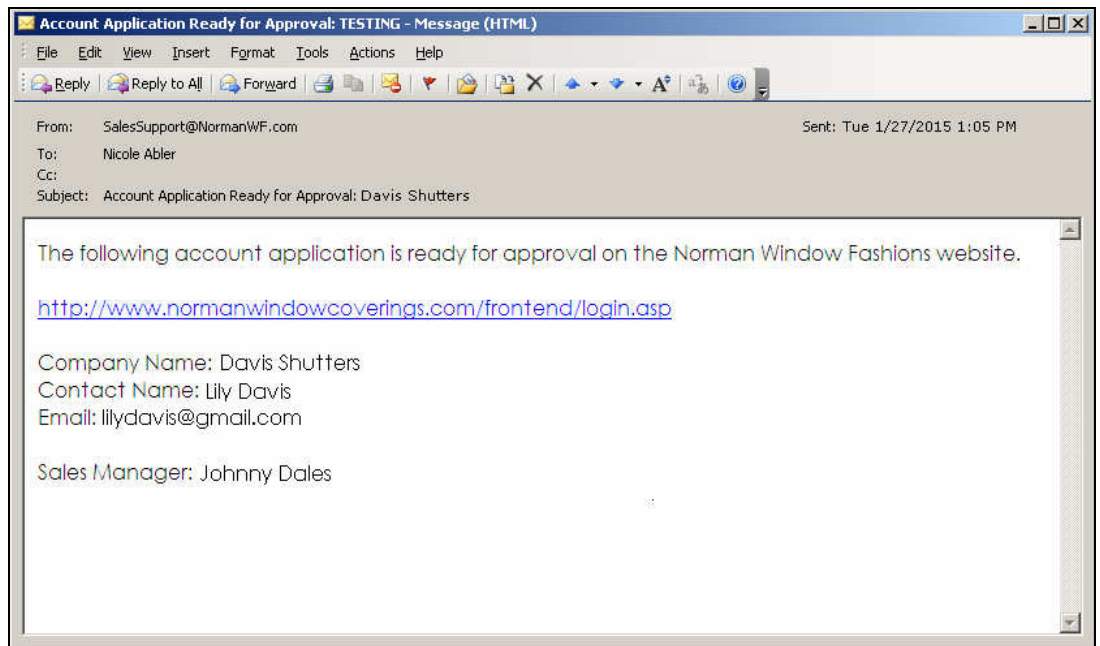
Account Applications

Application Type: All Status: Customer ID: Search

Send Account Application Link

Active	Type	Company Name	Contact Name	Email	Link Sent 1	Application Complete	Application Approved	Account Set Up	Cust ID	Pricing	Ready for Approval
Delete	New	ABC Shutters	Jamie Lee	NicoleA@NormanUSA.com	12/26/2017					Update	<input type="checkbox"/>
Delete	New	Davis Shutters	Lily Davis	lilydavis@gmail.com	12/26/2017	12/26/2017				Update	<input checked="" type="checkbox"/>

Place Order
Track Order
On-Hold Questions
RGA Shopping Cart
Product Pricing
Marketing
Promotions
Employee Access



The GM will log into the website to review the application.

Then, the GM can approve the application for setup by clicking the "Approve" button.

When the GM approves the account for setup, an email will be sent to the sales manager to inform them that the account application has been approved for processing.

In addition, a date will appear in the Application Approved column.

When the account is set up, a notification email will be sent to the sales manager and a date will appear in the Account Set Up column.

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[Home](#)
[Products](#)
[Videos](#)
[Instructions](#)
[Contact Us](#)
[Log Out](#)

[Place Order](#)
[Track Order](#)
[On-Hold Questions](#)
[RGA Shopping Cart](#)
[Product Pricing](#)
[Marketing](#)
[Promotions](#)

Account Applications

Application Type: All Status: Customer ID:

Active	Type	Company Name	Contact Name	Email	Link Sent	Application Complete	Application Approved	Account Set Up	Cust ID	Pricing	Ready for Approval
<input type="button" value="Delete"/>	New	ABC Shutters	Jamie Lee	NicoleA@NormanUSA.com	12/26/2017					<input type="button" value="Update"/>	<input type="checkbox"/>
<input type="button" value="Delete"/>	New	Davis Shutters	Lily Davis	lilydavis@gmail.com	12/26/2017	12/26/2017	12/26/2017	12/26/2017		<input type="button" value="Update"/>	<input checked="" type="checkbox"/>

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