



SUN MOUNTAIN SPORTS CREDIT ONBOARDING – USER GUIDE

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WHY BUY SUN MOUNTAIN?

AHEAD-OF-TIME DESIGN THAT LITERALLY CHANGED THE GAME

For more than 40 years, Sun Mountain has delivered first-of-their kind product innovations, researched and engineered by industry-leading designers who are also avid golfers. From the modern stand bag and super lightweight bags under 3 lbs. to waterproof bags and more, we bring our passion on the course to improve the game for our customers.

WHY FILL OUT A CREDIT APPLICATION?

UNLOCKING ACCESS TO INDUSTRY LEADING PRODUCTS AT WHOLESALE PRICING

Filling out a credit application is the first step in unlocking access to Sun Mountain Sports' expansive catalogue of award-winning products at wholesale prices. A company's credit application offers the opportunity to request a credit line and earn favorable payable terms.

NEW ONLINE CREDIT PORTAL:

INTUTIVE, USER FRIENDLY PLATFORM, OPTIMIZED FOR FASTER PROCESSING

Sun mountain is replacing its previous credit application process with a new online portal, offering businesses a fast and straightforward way to apply for our wholesale program and credit lines. The new portal offers customers enhanced functionality compared to our previous process, as customers can now view the status outstanding applications and update form information within their application. This document acts as a guide to help users transition to the new application process.

*** While not all fields are required, filling out a thorough application allows us to make the best decision regarding your business's credit position and ensures that the applicable account, order, and payment information is landing in the right hands of your organization.

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GLOSSARY:

ACCOUNTS PAYABLE CONTACT: THE PERSON IN CHARGE OF APPROVING AND PROCESSING PAYMENTS TO VENDORS AND SUPPLIERS. THIS CONTACT WILL RECEIVE EMAIL CONFIRMATION OF INVOICES AND STATEMENTS.

BUYER CONTACT: THE PERSON WHO WORKS WITH OUR SALES REPS TO ORDER PRODUCTS FOR RESALE.

DBA (DOING BUSINESS AS): A TRADE NAME THAT DIFFERS FROM THE LEGAL NAME OF AN ORGANIZATION.

MERCHANDISER CONTACT: THE PERSON WHO NEEDS ORDER RECEIPTS AND INFORMATION TO MANAGE INVENTORY.

PERSONAL GUARANTY (PG): A LEGAL COMMITMENT UNDER THE AUTHORITY OF THE STATE OF MONTANA, STATING THE SIGNED IS HELD PERSONALLY LIABLE TO REPAY OR FULFILL DEBT OBLIGATIONS (SEE A MORE DETAILS WHEN FILLING OUT THE APPLICATION).

RECEIVING CONTACT: THE PERSON WHO RECEIVES GOODS TO INSPECT FOR QUALITY AND VERIFY ORDER DETAILS ARE ACCURATE.

MATERIALS CHECKLIST:

GENERAL APPLICATION INFORMATION FIELDS:

❖ **TAX EXEMPTION STATUS:**

- If your organization is tax exempt, please prepare the necessary tax documents to attach to the form.

❖ **BUSINESS ENTITY AND LICENSE INFORMATION:**

- Federal ID Number, Date Business Established
- Seller's Permit/Resale Certificate
- Social Security Number (SSN optional)

❖ **THIRD-PARTY FREIGHT CARRIER (IF APPLICABLE):**

- Carrier Name
- Carrier Account Number

FOR CUSTOMER'S REQUESTING A LINE OF CREDIT:

❖ **BANK INFORMATION:**

- Prepare a bank sheet to attach for faster processing OR
- Compile bank account information to enter manually.
- Two references are required per application:
 - Attach a reference sheet or enter information manually.

FOR CUSTOMER'S REQUESTING PREPAID TERMS:

❖ **CREDIT CARD ON FILE:**

- enter card information to be placed on the file of your account.
 - option to allow permission to process payments.



SUN MOUNTAIN SPORTS – ONLINE CREDIT ONBOARDING:

- Follow this link to create an online credit application: [SMS Credit Application](#).
- **GETTING STARTED:** On the home page, click the “Get Started” or “Sign in” icon to create an account. Once an account is created, verify your email address using the code sent to your account’s email address. You will likely be requested to verify your email twice during the account creation process.
 - *Please allow a couple of minutes for the verification code to appear in your inbox.*
- **UPDATING YOUR PROFILE:** Upon your first log in, you will be taken to your profile. You have the option to add business or cellphone numbers and a job title. Click “Update” to save the information entered. Click “Home” to toggle back to the landing page.
- **CREATING AN APPLICATION:** Click on the “Start New Application” icon in the “My applications” tab to begin the process. Please provide all necessary and required information pertaining to your company’s needs. *It may be helpful to compile all necessary business, contact, tax, and bank information prior to beginning the application (see the materials checklist to prepare).*
- **JOINING AN APPLICATION:** If you have received a PIN from someone in your organization, simply follow the link and go to the “My Applications” tab. Then click “Join via Invite PIN.” Enter your PIN and wait a moment for us to verify the PIN. This will connect you to the application, giving you access to collaborate with your team.
- **EDITING AND VIEWING DETAILS:** You have the flexibility to edit the details of an application after an application has been submitted or is in progress; however, once an application has been processed and **approved** by our credit department, changes can no longer be made to the existing application. The status of an application can be viewed under the “Application status” in the “My Applications” tab. You can view the details of your application at any time within your account.
- **ADDITIONAL ITEMS:** Once you apply, Sun Mountain Sports may require additional information such as making edits to the form, adding signatures, or editing contact or address information. We will reach out via email with specific details if your application needs additional information.
- **APPROVAL AND NEXT STEPS:** After careful consideration of your application by Sun Mountain Sport’s credit department, Sun Mountain Sports will email the primary contact on the account with the final decision and provide the instructions for the next steps.

FAQs:

If my business entity is classified as a sole proprietorship or partnership, is it required to enter social security numbers (SSNs) into the application?

- While we do not require SSNs from any applicants, providing SSNs in the application form (when applicable) allows our credit department to make the most informed decision about a company's requested credit line. Social security numbers may be used to look up Equifax credit reports during the credit review process but are purged from our online database once an application is approved.

If my question is not answered in this document, who do I contact for additional assistance?

- Contact our customer care team Monday through Friday from 7 a.m. to 4 p.m. Mountain Time by calling 1-800-277-9224 or email us at creditdepartment@sunmountain.com to work through any issues faced in the application process.