



# NEW CUSTOMER CHECKLIST

COMPANY NAME:

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ACCOUNT NUMBER:

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OPEN M&A SUPPLY ACCOUNT & DISCUSS CREDIT LINE NEEDS

GO OVER PRICE BOOK WITH CUSTOMER & SYSTEM MATCHES

COMPLETE & SUBMIT YORK DEALER FORM

SET UP NAVIGATOR ACCOUNT

- company set up: If not already in Navigator

- users: all key employees will need a user account

REGISTER TO BECOME A YORK COMFORT PLAN DEALER

REGISTER TO BECOME A SYNCHRONY FINANCIAL  
MERCHANT

HVAC NAVIGATOR TRAINING FOR KEY EMPLOYEES

SYNCHRONY RESIDENTIAL FINANCIAL TRAINING

M&A SUPPLY PRODUCT OVERVIEW & TRAINING

BRANCH TOUR/MEET M&A SUPPLY TEAM

DOWNLOAD M&A SUPPLY MOBILE APP

PRAXIS SALES & PRICING TOOL OVERVIEW/TRAINING

M&A SUPPLY E-COMMERCE OVERVIEW AND TRAINING

**M&A**  
SUPPLY COMPANY INC.

The logo features the letters 'M&A' in a large, bold, white sans-serif font. Below it, the words 'SUPPLY COMPANY INC.' are written in a smaller, white, all-caps sans-serif font. The background of the logo is a dark grey world map.

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FOR FORM LINKS