客　戶　調　查　表

完成日：　　年　　月　　日

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| 客戶名稱 | | | |  | | | | | | | | 負責人 | | | | | | | |  | | | | | | | | | | |
| 地址 | | | |  | | | | | | | | | | | | | | | | 電話 | | | | |  | | | | | |
| 實  績  演  變 | 年 | | 資  本  額 |  | | | 員工  人  數 | 人 | | | | 年  銷  售  額 | |  | | | | | | 創業 | | | | |  | | | | | |
| 年 | |  | | | 人 | | | |  | | | | | | 設立公司 | | | | |  | | | | | |
| 年 | |  | | | 人 | | | |  | | | | | | 組織形態 | | | | |  | | | | | |
| 年 | |  | | | 人 | | | |  | | | | | |  | | | | | |
| 經  營  者 | 出生地 | | |  | | | | 地址 | |  | | | | | | | | | | | | | 電話 | | |  | | | | |
| 出生日期 | | | 年　 月　日 | | | | 學歷 | |  | | | | | | | | | | | | | | | | | | | | |
| 經歷 | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 資  產 | 不 動 產 | |  | | | 興趣 | | |  | | | | | 持股比 | | | |  | | | | | | | 專業度 | | | |  |
| 動　　產 | |  | | | 特殊技術 | | |  | | | | | | | 性格、特徵 | | | | | | |  | | | | | | |
| 主  要  幹  部 | 姓　　　名 | | | 年　齡 | | 職　　　等 | | | | | 擔任職務 | | | | | | 與負責人關係 | | | | | | | | | | 備　　　　註 | | | |
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| 營  業  商  品 |  | | | | | | | | | | 主  要  進  貨  廠  商 | | | 公司名稱 | | | | | | | 構成比率 | | | | | | | 交易開始日期 | | |
|  | | | | | | | | | |  | | | | | | |  | | | | | | |  | | |
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|  | | | | | | | | | | 本公司順位 | | | | | | 第　　　 　位　　　　 ％ | | | | | | | | | | |
| 銷  售 | 銷售地區 | | |  | | | | | | | | | | | 銷售員 | | | | | 人 | | | | | | | | | | |
| 主要客戶 | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 銷售方針 | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 財  務 | 往來銀行 | | |  | | | | | | | | | 借款額度 | | | | |  | | | | | | | | | | | | |
| 財務狀況 | | |  | | | | | | | | | 收益狀況 | | | | |  | | | | | | | | | | | | |
| 與  本  公  司  的  交  易  狀  況 | 項目  年別 | | 本公司的  銷 售 額 | | 順　　位 | | | | 回 收 率 | | | | | | | 銷　　售  達 成 率 | | | | | | 退 貨 率 | | | | | | | 折 扣 率 | |
| 年 | |  | |  | | | |  | | | | | | |  | | | | | |  | | | | | | |  | |
| 年 | |  | |  | | | |  | | | | | | |  | | | | | |  | | | | | | |  | |
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| 年 | |  | |  | | | |  | | | | | | |  | | | | | |  | | | | | | |  | |
| 備  註 |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |