IMM eSign Loan Coupons Pre-Install Survey

Please complete the following form and return it to your IMM Project Manager. If you have any questions, please contact your IMM Project Manager for assistance.

## Client Information:

**Company Name:** Click or tap here to enter text.

**Company Address:** Click or tap here to enter text.

## CU Logo:

Please provide a copy of your logo. The logo should be a high quality in a jpg, tif, or pcx format. Please email it to your IMM Project Manager.

## Contact Information:

Please ensure that, at a minimum, you designate a Project Lead and we have the cell phone for the Lead. It is very important that we be able to reach the Project Lead for setup questions. Delays in getting information can interfere with the implementation scheduled.

**Technical Contact (IT Administrator)**

* **Project Lead? (Yes or No):** Click or tap here to enter text.
* **Name:** Click or tap here to enter text.
* **Title:** Click or tap here to enter text.
* **Phone:** Click or tap here to enter text.
* **Cell:** Click or tap here to enter text.
* **Email:** Click or tap here to enter text.

**Operations Contact (Decision maker for the coupons template)**

* **Project Lead? (Yes or No):** Click or tap here to enter text.
* **Name:** Click or tap here to enter text.
* **Title:** Click or tap here to enter text.
* **Phone:** Click or tap here to enter text.
* **Cell:** Click or tap here to enter text.
* **Email:** Click or tap here to enter text.

## Loans Coupons Information

Please review the following required information in order for IMM to begin your loan coupons design.

Important Notes:

* IMM recommends your generate from the core System because each open Loan resides within the Core System.
* Loan coupons can only be generated from one system. This system MUST have integration with eSign
* If applicant loses coupon book or makes changes to payment agreements, all changed should be processed in the Core System based on the loan number

**Where will the Loan Coupons be processed from?** Click or tap here to enter text.

**Name of System:** Click or tap here to enter text.

**Payment Center Address:** Click or tap here to enter text.

**Marketing Message (optional):** Click or tap here to enter text.

## Loan Coupon Design Revisions/Changes

Please note that Loan Coupon installs include a 45 day warranty period from the live date. Corrections will be completed at no additional charge during this time, but additional revisions beyond the original scope will be billed at the current rate. For an estimate of the rates, please go to the [IMM Support Guidelines](https://www.immonline.com/support-guidelines/) web page, scroll down and locate the **Document Pricing Guidelines**, and click on  **View Our Pricing Guidelines**.

After the 45 days from your Loan Coupons live date, a new proposal will be sent for signature.

## Signature

Name and date of the person who has completed this survey:

**Name:** Click or tap here to enter text.

**Date:** Click or tap here to enter text.