Instructions

This document is used to gather information to ensure a successful implementation. Please answer the questions and return to your Project Manager's secure mail drop. Please inquire with your Project Manager if their secure mail drop address has not been shared with you. **Delays in completing this survey impact the Project Timeline.**

Customer Information

Financial Institution Name:		Time Zone:	
Financial Institution Address:		Business Hours:	

Logo: Please provide a high quality TIFF or PCX (JPEG is also acceptable only if TIFF or PCX are not available) and send logo to your Project Manager.

Operations Contact: This is the primary contact regarding operational issues for both implementation and ongoing support. This person is responsible for testing and final approval of the loan coupon design packages, to ensure all the information from the core system is being processed onto the loan coupon and the overall design meets satisfaction.

Name:		Title:	
Phone:		Cell:	
Email:			

Loan Coupon Information

Review the following required information in order for IMM to begin your loan coupon design.

Where will the Loan Coupons be processed from?

Note: Loan Coupons can only be generated from any one of your systems - Core System OR LOS (Loan Origination System).

Name of System:

IMM recommends you generate coupons from the Core System because of the following benefits:
- To print the Loan Coupons - You require an Application # OR Loan suffix #.
- Application # is generated by your LOS System. Loan Suffix # is generated by your Core System.
- Once the Loan Application is funded\booked on your LOS system, the application # will get a Loan suffix #.
- By selecting Core System - It allows loan officer to print the coupons throughout the term of the loan. The Loan Suffix # keeps track of payments collection. Also, it is the loan suffix # that has the current balance, due date, etc. which are needed to print coupons throughout the term of the loan.

Payment Center Address:

Marketing message (optional):

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 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.

Name of FI Representative	Date