



SARMA Collections, Inc. New Client Summary (please print)

Date: _____

Account Representative: _____

Client #: _____

Company Name: _____

Address: _____

Phone #: _____ Ext: _____

Fax #: _____

Contact Name and Title: _____

Email address: _____

Fee Schedule: _____ Gross Net

Type of Business (i.e. Doctor (please be specific), Hospital, Retail, Attorney, Etc)

Type of Collection Service to be provided: _____

Service Provided and Location: _____

Special Request and or Instructions:

Clerical & MIS Purposes:

(1) Are you tax exempt? YES or NO (if yes, we need a copy of the tax exempt form)

(2) Payment Verification: How will it be done & how often _____

(3) Does Client accept Credit cards? YES or NO

Which cards? VISA MASTERCARD DISCOVER AMERICAN EXPRESS

(4) What % will Client accept as a settlement? _____ %

(5) Age of Placements:

Primary: _____

Secondary: _____

How often submit: _____

(6) Will Client furnish itemized statement YES or NO

If yes, At time of placement or upon request

(7) Report to Credit Bureau: YES or NO

(8) Can Client Comply with Date of Occurrence? YES or NO



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Client Placement Information - Technical

SARMA can accept many different formats of placement information. We have worked with many different billing systems and applications when handling debt placements. The most effective formats include reports generated by the customer's billing system in ASCII fixed, CSV, or tab delimited file formats. Please consult your technical staff to answer the following questions concerning your placement information. Please note our different submission options that are secure, fast, and available at all times via the web. This information is covered in detail in our submission documentation. We have technical staff ready to help make the transition and submission of placements as easy and smooth as possible for our clients. Thank you.

(1) What do you currently use to handle your billing (software application)?

(2) Can you generate an electronic file with debtor information to submit to SARMA with this application YES or NO

If yes, what format is that information in (TXT, CSV, etc.)?

If no, do you need someone to help you do so?

(3) Do you have Internet access (can you browse the web)? YES or NO

If you do not, do you have email access? YES or NO

(4) If you do not have Internet or email access, do you plan to send your files via postal mail?

YES or NO

If yes, what media type do you plan to use?

Floppy Disk CD Other (please identify) _____

Please provide the following information:

Technical Contact Person: _____

Technical Contact Email Address: _____

Technical Contact Phone Number: _____

Please attach a sample file layout with clear notation of fields and information. Please see our "Debtor Information" sheet to view which fields are required and other fields that are helpful in the recovery process.



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Placement submission options:

- (1) Upload your placement files via our website at www.sarmacollections.com
- (2) Input individual debtor information via our website at www.sarmacollections.com
- (3) If your files are over 3MB in size, please ask your sales person about being set up for secure FTPS options
- (4) Submit placements via email using encryption

If you need help in determining which option is best for you, our technical staff would be glad to work with you on this. Special arrangements can be made for clients who are not able to submit in any of the above options. Be sure to read through our documentation concerning the new web submission process. It is fast, easy, and secure!