



Universal Business Solutions, Inc.  
 2436 Emrick Boulevard  
 Bethlehem, PA 18020  
 (610) 317-1670

## Corporate Services and Fulfillment Questionnaire

**Company Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Principal Contact:** \_\_\_\_\_

**Principal Contact's Email:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

**Phone#:** \_\_\_\_\_ **Cell #:** \_\_\_\_\_ **Fax#:** \_\_\_\_\_

**Website:** \_\_\_\_\_

**Type of Product:**     **General**             **Medical**             **Aesthetic**

**Description of Product(s):** \_\_\_\_\_

**Do you need fulfillment for International purposes?** \_\_\_\_\_

**If yes, what country (countries)?** \_\_\_\_\_

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**UBS Use:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



<b>Customers</b>	
Is there an existing customer database? If yes, can it be sent in an Excel spreadsheet format?	
<b>Sales Reps</b>	
Are there existing sales reps? If yes, how many?	
Will UBS be responsible for supporting reps by shipping samples, shipping/emailing literature, calculating commission, creating commission reports, etc.?	
<b>Order Receipt</b>	
How will UBS be receiving orders, e.g. phone, fax, email, etc.?	
Is there an established toll-free number? If yes, will calls be automatically forwarded to UBS?	
Who will be calling UBS with orders, e.g. customers, sales reps, staff, etc.?	
<b>Shipping</b>	
Is there an established shipper account, e.g. FedEx, UPS, etc.?	
Will UBS be asked to ship inventory other than for customer orders, e.g. samples, trade show, etc.?	
<b>Inventory</b>	
How many items are on the product list? (Price list needed)	
How much product will have to be stored?	
How do we request product?	



<b>Sales Tax</b>	
Are there any existing sales tax registrations in any states?	
<b>Order Processing</b>	
Is there an existing order form? If yes, will UBS info be added?	
If no, will UBS be creating an order form for customer use?	
Is there a minimum order requirement, e.g. 1 case, 1 dozen, etc.?	
Are purchase order numbers necessary?	
Are the customers primarily hospital or medical facilities?	
<b>Payment Processing</b>	
What payment terms will be offered, e.g. 30 day, credit card, personal checks, ACH, etc.?	
Will UBS be processing credit card payments?	
Will customer payments be deposited directly to client account? If yes, is ACH/electronic check payment available?	
If terms are offered, will UBS be responsible for collections?	



<b>Commission</b>	
Will UBS be paid commission on sales? If yes, what percentage or per unit amount?	
<b>Customer Service</b>	
Will UBS be expected to handle technical questions? If no, where will those calls be forwarded?	
<b>Marketing</b>	
Will UBS have any marketing responsibilities, e.g. document review, printing, trade show involvement, shipping related to marketing events?	

Once the application is completed, please fax to 610-317-1672 or email [jfaust@ubsmed.com](mailto:jfaust@ubsmed.com). If you have any questions, please call (610) 317-1670 x116. We look forward to providing a proposal.

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[www.ubsfulfillment.com](http://www.ubsfulfillment.com)