### **Karley Stover**

From: Wayne Pierce

**Sent:** Thursday, March 3, 2022 9:29 AM **To:** Sales; Mortgage Support Center

**Subject:** Sure Fire

Good morning. I hope everyone is having a great Thursday morning. We wanted to follow up on Sure Fire this morning. We are seeing quite a few of you log in and update your profiles. Which is great. But we are afraid that not everyone has had time to do this. Unfortunately we are not able to see if you logged in and had no changes. To give everyone time to log in and make changes we are going to push the Launch to Monday. This will give everyone an extra day to log in and review their contacts and their profile information. If you have questions or have trouble getting logged in please contact Mortgage Support and they will assist you.

To help us track who has had a chance to take care of this we are asking that once you are able to log in and review everything that you send an email to <a href="mailto:LPOMarketing@flanaganstatebank.com">LPOMarketing@flanaganstatebank.com</a> to let us know you are good. If you have already logged in then please send an email as well. This will allow us to track who was able to do this so that we can reach out and assist anyone who was not able to.

We are very excited about this Marketing Tool and feel that it will be a great asset to everyone as we move forward in this interesting market. WE hope that you all are excited as we are and look forward to helping you use this product to its fullest potential.

As Toni discussed yesterday she and her team are working on more trainings for the future to help you maximize this tool

Thank you for your assistance with this and let us know if you have any questions.

SIEZE THE DAY AND MAKE IT GREAT!

Thanks,

Wayne Pierce
Operations Manager
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From: Wayne Pierce

Sent: Wednesday, March 2, 2022 4:10 PM

To: Sales <sales@flanaganstatebank.com>; Mortgage Support Center <mtgsupportcenter@flanaganstatebank.com>

Subject: Sure Fire

Good afternoon. We wanted to send a follow up email out regarding Sure Fire for anyone who was not able to be on the call today. We are going live with Surefire on Friday March 4<sup>th</sup>. It is very important that you have logged in to Sure Fire and reviewed your profile to make sure it is set up to your liking. Starting Friday the system will start sending out auto generated messages to your borrowers. This information is generated from a daily report that gets uploaded advising Sure Fire of a change of status. There are also automatic notifications going out to your previous clients. If you need your login reset please contact Mortgage Support today and they will reset it for you. Some of the notifications that your borrowers will get are below.

#### **Closed Loan Customers**

Notification on Birthday Notification on all Bank Holidays

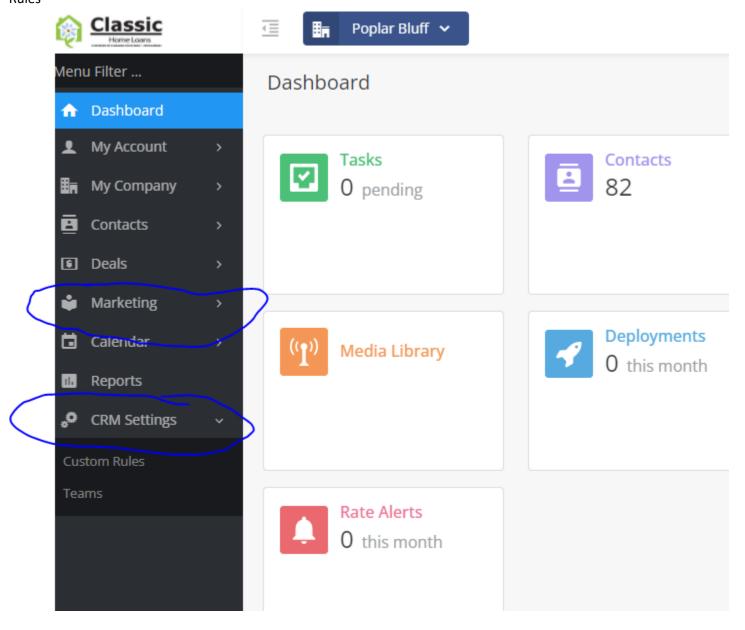
#### **Loans in Processing Customers**

Notification of Application Notification of Lock Notification of Underwriting Approval Notification of Clear to Close

To see all of the Notifications that are Active/Published for your contacts you can check the following places. Some screenshot examples are below:

Marketing>Deployment Center

## CRM Settings>Custom Rules



# Deployment Center

Scheduled Deployed Available Subscriptions My Subscriptions Cancelled

C

Deployment Level **Date Subscribed** Type Poplar Bluff Labor Day Summer Fun - FSB 3/2/2022 8:45 am New Year Day Email Poplar Bluff 3/2/2022 8:43 am Memorial Day Email Poplar Bluff 3/2/2022 8:35 am Flanagan State Bank - Corporate 2/10/2021 10:51 ar Loan Anniversary on Primary Residence Deal Birthday Rule Flanagan State Bank - Corporate 2/10/2021 10:51 ar

Paused	Flanagan State Bank - Corporate	01 - In Process Intro - Purchase	Mortgage	Standard Sales Process	Send Intro Ema Loans
Paused	Flanagan State Bank - Corporate	01 - In Process Intro - Refi	Mortgage	Standard Sales Process	Send Intro Ema Loans
Published	Flanagan State Bank - Corporate	02 - In Process Application Received - Purchase	Mortgage	Standard Sales Process	Send Application
Published	Flanagan State Bank - Corporate	02 - In Process Application Received - Refi	Mortgage	Standard Sales Process	Send Application Email for Refi L documentation
Published	Flanagan State Bank - Corporate	03 - In Process Loan Estimate Sent - Purchase	Mortgage	Standard Sales Process	Send Loan Esti Purchase Loan
Published	Flanagan State Bank - Corporate	03 - In Process Loan Estimate Sent - Refi	Mortgage	Standard Sales Process	Send Loan Esti Refi Loans
Paused	Flanagan State Bank - Corporate	04 - In Process Documentation - Purchase	Mortgage	Standard Sales Process	Send Documer for Purchase Lo
Paused	Flanagan State Bank - Corporate	04 - In Process Documentation - Refi	Mortgage	Standard Sales Process	Send Documer for Refi Loans
Published	Flanagan State Bank - Corporate	05 - In Process Appraisal - Purchase	Mortgage	Standard Sales Process	Send Appraisal Purchase Loan
Published	Flanagan State Bank - Corporate	05 - In Process Appraisal - Refi	Mortgage	Standard Sales Process	Send Appraisal Loans
Published	Flanagan State Bank - Corporate	06 - In Process Rate Lock - Purchase	Mortgage	Standard Sales Process	Send Rate Lock Purchase Loan

Thanks,

Wayne Pierce Operations Manager NMLS #1487019

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