

## Karley Stover

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**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 [LPOMarketing@flanagansstatebank.com](mailto:LPOMarketing@flanagansstatebank.com) 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  
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**From:** Wayne Pierce

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

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

The screenshot shows the Classic Home Loans CRM interface. On the left is a dark sidebar menu with a 'Menu Filter ...' header. The menu items are: Dashboard (with a home icon), My Account (with a person icon), My Company (with a building icon), Contacts (with a person icon), Deals (with a tag icon), Marketing (with a megaphone icon), Calendar (with a calendar icon), Reports (with a bar chart icon), CRM Settings (with a gear icon and a dropdown arrow), Custom Rules, and Teams. The 'Marketing' and 'CRM Settings' items are circled in blue. The main area is titled 'Dashboard' and features a top bar with a hamburger menu icon and a 'Poplar Bluff' dropdown. The dashboard contains five widgets: 'Tasks' (0 pending), 'Contacts' (82), 'Media Library' (with a radio tower icon), 'Deployments' (0 this month), and 'Rate Alerts' (0 this month).

Classic Home Loans

Menu Filter ...

- Dashboard
- My Account
- My Company
- Contacts
- Deals
- Marketing
- Calendar
- Reports
- CRM Settings
- Custom Rules
- Teams

Dashboard

Poplar Bluff

Tasks  
0 pending

Contacts  
82

Media Library

Deployments  
0 this month

Rate Alerts  
0 this month



## Deployment Center

Scheduled

Deployed

Available Subscriptions

My Subscriptions

Cancelled



1 - 5 of 5



= Deployment



= Rule



Type	Deployment	Level	Date Subscribed
	Labor Day Summer Fun - FSB	Poplar Bluff	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
	Loan Anniversary on Primary Residence Deal	Flanagan State Bank - Corporate	2/10/2021 10:51 ar
	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 Email Loans
Paused	Flanagan State Bank - Corporate	01 - In Process Intro - Refi	Mortgage	Standard Sales Process	Send Intro Email Loans
Published	Flanagan State Bank - Corporate	02 - In Process Application Received - Purchase	Mortgage	Standard Sales Process	Send Application Email for Purchase
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 Estimate Purchase Loan
Published	Flanagan State Bank - Corporate	03 - In Process Loan Estimate Sent - Refi	Mortgage	Standard Sales Process	Send Loan Estimate Refi Loans
Paused	Flanagan State Bank - Corporate	04 - In Process Documentation - Purchase	Mortgage	Standard Sales Process	Send Documentation for Purchase Loans
Paused	Flanagan State Bank - Corporate	04 - In Process Documentation - Refi	Mortgage	Standard Sales Process	Send Documentation 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

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