### **Karley Stover**

From: Wayne Pierce

**Sent:** Wednesday, March 2, 2022 4:10 PM **To:** Sales; Mortgage Support Center

**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

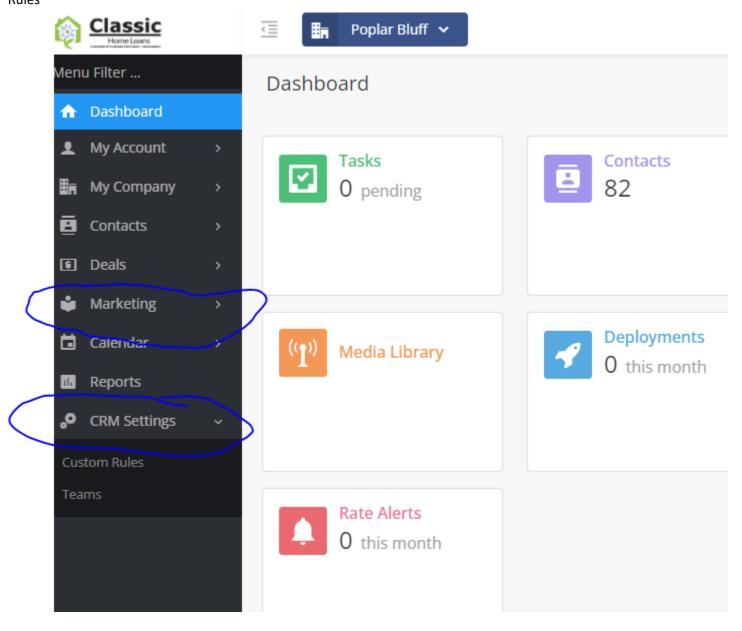
#### **Loans in Processing Customers**

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

= Deployment 😢 = Rule < > 1-5 of 5

Туре	Deployment	Level	Date Subscribed	
4	Labor Day Summer Fun - FSB	Poplar Bluff	3/2/2022 8:45 am	
4	New Year Day Email	Poplar Bluff	3/2/2022 8:43 am	
4	Memorial Day Email	Poplar Bluff	3/2/2022 8:35 am	
[V]	Loan Anniversary on Primary Residence Deal	Flanagan State Bank - Corporate	2/10/2021 10:51 ar	
P	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,

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