



Using The Flexxbuy Back Office CRM

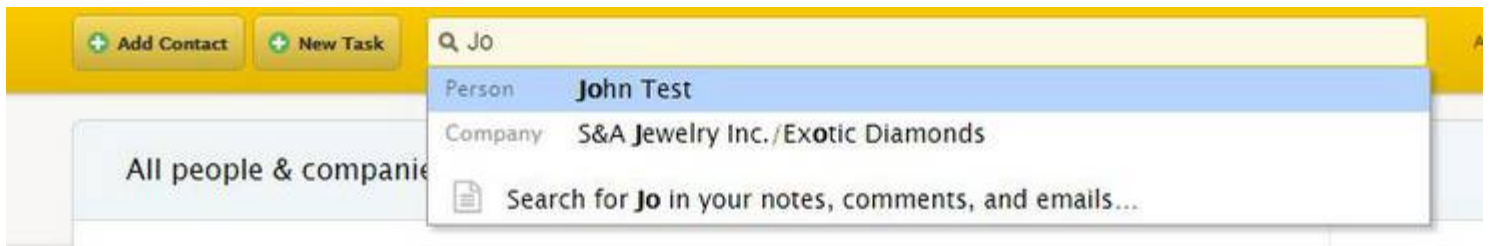
By now, you should have received your welcome letter and your invitation from Flexxbuy's Highrise CRM. If not done so, accept the invitation and go through the setup process. **Note: Flexxbuy does not own or control Highrise CRM. We simply utilize it as an important tool in organizing our business.**

It is important to understand that all notifications throughout a loan application process will be entered into Highrise and emailed to you as well. That being said, it may be helpful to go into Highrise and initiate a communication through a note or to take account of your book of business. These procedures will help you do so. Highrise also provides an excellent Help section with tutorials that go into far more detail that we can.

To search for information regarding your borrowers, click on the “Contact” tab and do the following:

To Search for a specific borrower:

Simply begin entering the name in the top toolbar



To search for a category of borrowers:

Click on the tags on the right for the categories you want to search. For all loans, click on “application submitted”. To see declines, “application declined”. For funded, “application funded”. Etc.

Note: Make sure you clear the top section by clicking on “Start Over” when beginning a new search.

Filter your contacts by:

[Name](#) [Company](#) [Title](#) [Email](#) [City](#) [State](#) [Country](#) [Zip](#) [Street](#) [Phone](#) [Background](#) [Website](#) [Deal](#) [Case](#)
[Best Time To Call](#) [Business Type](#) [Customer ID](#) [Date of Application](#) [Employer Name](#) [Employment Status](#)
[Gross Income](#) [How Often Paid](#) [Key Merchant Contact](#) [Last Four Digits Of SS](#) [Lenders/Programs](#)
[Loan Amount Request](#) [Merchant](#) [Merchant Application URL](#) [Merchant Pricing](#) [Monthly Housing Payment](#)
[Net Income](#) [Occupation](#) [Own or Rent](#) [Purpose of Loan](#) [Referred By](#) [Sales Agent](#) [Secondary Phone Number](#)
[Secondary Phone Type](#) [Time In Business](#)

tag: application submitted [Start Over](#)

Select contacts to add or remove tags, change who can see them, or delete.

Select all

Easy in easy out

[Import](#) or [Export](#) your contacts.

Browse by tag

[Manage tags](#)

4 4C Auto Repair

A active merchant

Alex Shumate

application declined

application funded

application in process

application pre-approved



To make a Note and Communicate with Customer Support:

First, click on the borrower you want to address.

Open up the blank Note box by clicking on Show options.

Type in the note for the borrower. You can select who can see this note by clicking on the “x” in the Who else can see this note? , for the person you do not want to see it.

You can email the note to whomever you want by selecting everyone or specific individuals.

If needed, documents can also be attached to the note. It is secured in a drop box file.



Dan Wolf
application funded application pre-approved application submitted Bob L
[Edit tags](#)

Please call me on this borrower

Attach files
 No file chosen

Filed to
Select a deal or case

Who else can see this note?
Dan Wolf x Dave Rogerson x
Michelle Seppe x Rich Mauro x

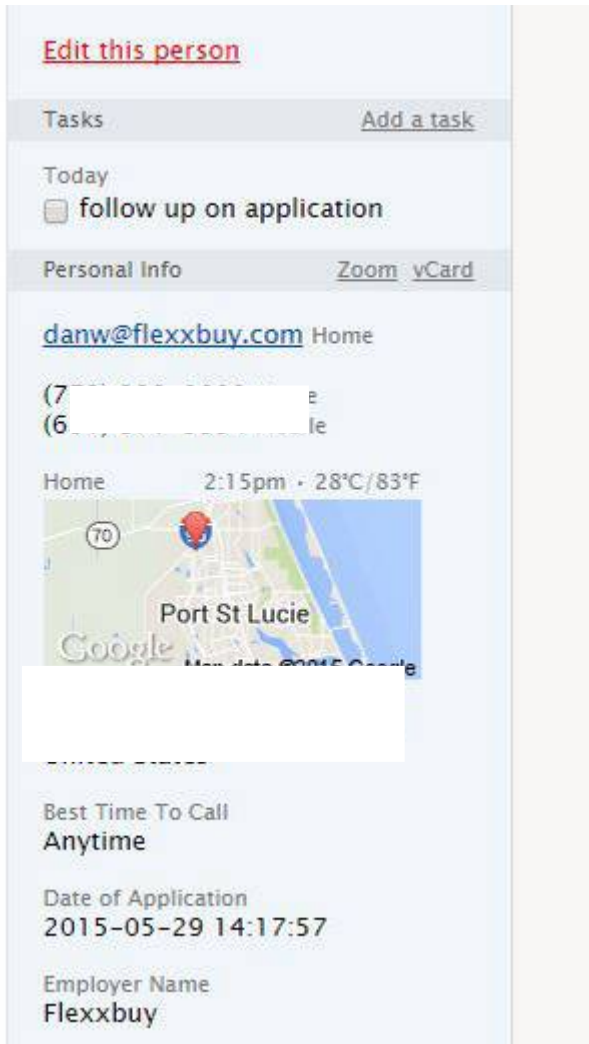
When did it happen?
May 30 2015

Email this note
The people you select will get an email when you add this note. They'll also be notified every time a com

Everyone
 Dan Wolf Michelle Seppe
 Dave Rogerson Rich Mauro



You can also use the Back Office CRM for your own personal management.



You can create a Task for yourself that only you can see or you can assign a Task to someone else in your group.

All your Tasks will show up in one place on your Tasks page (tab on left side).

This CRM is a powerful tool. For additional features, click on the Help button on the Top right .