SPEAR to EZLynx Initial Call Step by Step

System input:

- Find suspect lead in Spear on dashboard (light blue)
- Check EZlynx by typing in first/last name to see if they are already in the system
    - If they are in the system make sure Spear is assigned to the person assigned in EZlynx
- If not in the system already, in Spear click “send to Ezlynx” button
- Then click “view in ezlynx”
- Follow the orange boxes to fill out gender and occupation
    - For occupation, you can find this in Spear, in the lead, under the “borrowers” tab right after the details tab.
- If no co-borrower, scroll all the way to the bottom and click red “remove” button.
- For address:
    - If refinance, put property address length of time to three years
    - If new purchase, put previous address length of time to three years
- Scroll to the bottom in EZlynx and click “save”

Process for reaching out to client:

- Make initial call to ask underwriting and preferred rating questions
- Leave VM if no contact, followed by “send questionnaire” button in spear, top right corner
- In Ezlynx click on “Activity” tab, click on pencil w/ + sign to add an activity
- Label “21.22 New Business” and input:
    - From Spear Loan tab copy paste all information
    - From Spear details tab, gather closing date by hovering over “source opportunity”
    - Document contact attempts (call/VM/sent questions etc.) OR
    - Input the answers you received if you did make contact

Email to agent:

- Whoever is assigned to spear lead, send an email w/ the following:
    - Suspect can be moved to prospect
    - Contact attempts/reached
    - Link to Ezlynx