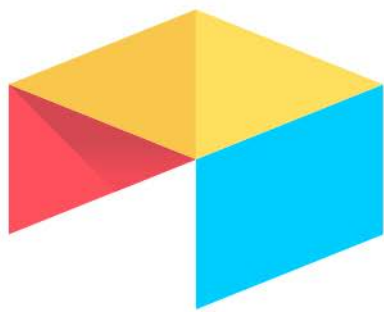




Stacia Weishaar's Airtable Guide



Airtable



The Defining Difference
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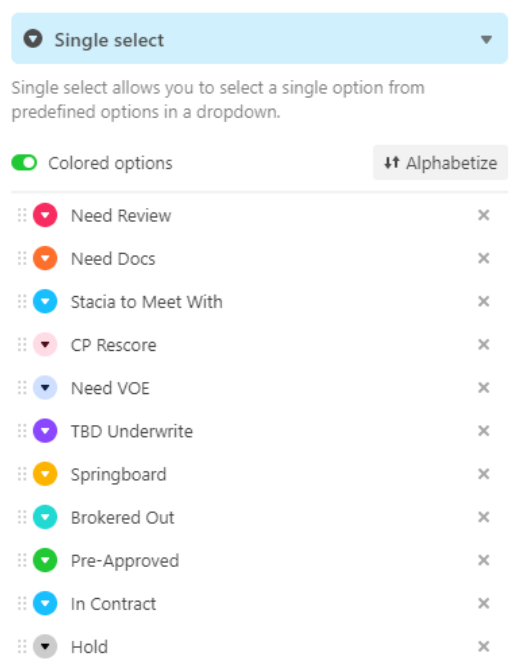
Think of Airtable as Excel! That is all it is – there is much more functionality, but you can keep it simple. This guide was created based on Team Weishaar's operational structure. You can customize Airtable to suit your own loan process. Visit www.Airtable.com for more info or to request additional support.

A few quick tips:

- 1) You can upload existing Excel documents into a base
- 2) Think of a "base" as an Excel document
- 3) Each tab in a base is like a tab in Excel

Team Weishaar's BASE of main topics and tabs within each of the following:

- **BASE: Active YEAR** (and create one for each new year)
 - Active
 - Current in-contract pipeline
 - Sort By
 - Month and close date
 - Track everything for your pipeline (i.e., loan amounts, closing dates, contact information, status notes on each file)
 - Pre-Approvals
 - Track everything for your pre-approvals (i.e., loan amounts, referral partner, lead intake notes, contact information, status of files) (i.e., Categories)
 - Categories (i.e., status)



- Canceled Files from in Active
- Master closed loans
 - Funded files – data entry is perfect and exact

- **BASE: Lead Database**

- Leads
 - Categories

Single select

Single select allows you to select a single option from predefined options in a dropdown.

Colored options ↑↓ Alphabetize

Intro Email Sent	X
FOLLOW-UP	X
1ST MEETING SCHEDULED	X
APP EMAILED	X
Refi TCA Sent	X
CLIENT ACTION	X
MOVED To PreApproval	X
WITHDRAWN	X
NO RESPONSE	X
CANCELLED PA	X
CLOSED	X
NO CONTACT INFO	X
LOST COMPETITION	X
WORKING ON CREDIT/QUALIFICATION	X

- Intake Questions and enter notes

- **BASE: Refinances**

- Refinance Watch
- Rate Alerts
- Closed Loans with MI

- **BASE: Lead to Legacy**

- Lead to Legacy - Process Flow Purchase
- Lead to Legacy - Process Flow Refinance

- **BASE: Annual Client Reviews**

- Annual Reviews (form) automated

- **BASE: Agents**

- Team Agents
- Target Agents
- Master Agent List