



FLANAGAN *State Bank*

# FSB MARKETING PORTAL INSTRUCTION MANUAL

[www.fsbmarketing.com](http://www.fsbmarketing.com) has been designed to facilitate fast, efficient collaboration, communication, and production between the Flanagan State Bank Marketing Department, Mortgage Loan Brands, Offices, Managers and Officers.

Our intent is to keep adding additional functionality to help you all succeed. In order to do so, please send any comments, complaints, suggestions, ideas, etc. to [marketing@flanaganstatebank.com](mailto:marketing@flanaganstatebank.com).

# ADDING/REMOVING A LOAN OFFICER

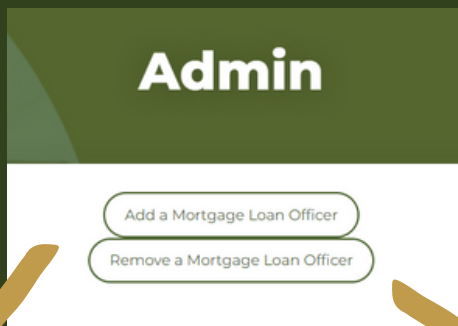
(Sales managers & branch managers only)

1



From the home page, click on "Admin". Only sales managers and branch managers have access to this page.

2



The "Admin" page will take you here. This is where you pick if you want to add or remove a loan officer.

3

ADDING A LOAN OFFICER

A screenshot of the 'Add a Mortgage Loan Officer' form. The title is 'Add a Mortgage Loan Officer'. Below it is a text input field labeled 'New Loan Officer First and Last Name \*'. At the bottom left, there is a 'Brand \*' dropdown menu.

This will bring you to a form to fill out for the NEW loan officer. Enter in all of their information and hit "SUBMIT" at the end of the form. Marketing will get this request and begin the onboarding process.

4

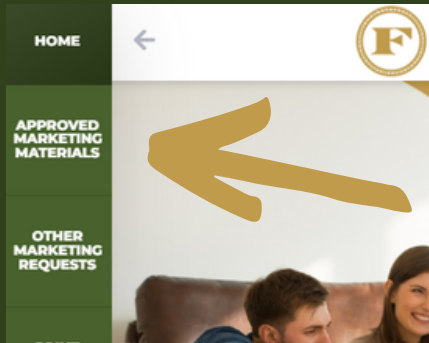
REMOVING A LOAN OFFICER

A screenshot of the 'Remove a Mortgage Loan Officer' form. The title is 'Remove a Mortgage Loan Officer'. Below it is a dropdown menu labeled 'Select Mortgage Loan Officer to Remove' with a 'Select' option visible. Below the dropdown is a text area labeled 'Comments'.

This will take you to a form to fill out for the loan officer that is being removed. Fill the form out and hit "SUBMIT" at the end. This will get sent to marketing and that Loan Officer will be removed from all marketing materials.

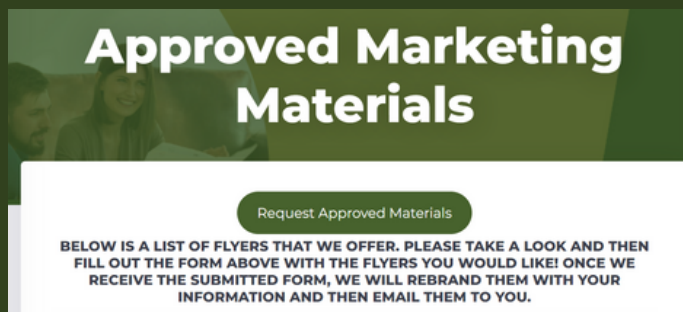
# REQUESTING PRE-APPROVED MARKETING MATERIALS

1



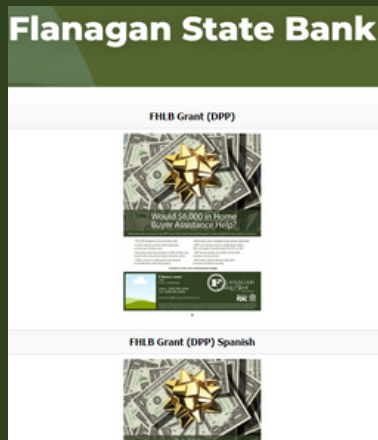
From the home page, click on "Approved Marketing Materials". This section is filled with flyers that are already compliant approved and ready for you to use!

2



The "Approved Marketing Materials" tab will take you to this page.

3



From here, you will be able to see all the pre-approved materials that we offer. Scroll down to view them all. Once you know which flyers you would like, click on the green button that says, "Request Approved Materials".

4

**Request Approved Materials**

Select MLO \*  
Select

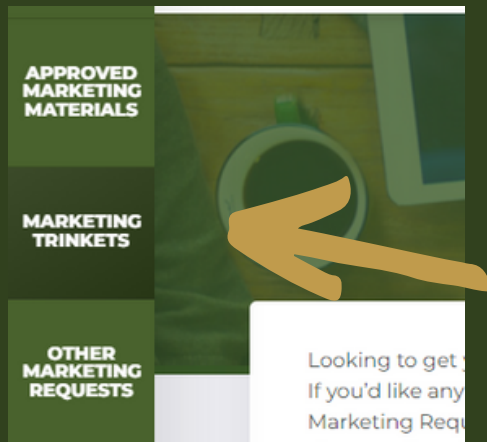
Brand \*  
Select

Material(s) Requested \*  
Select

This will bring you to a form that needs to be filled out. This is where you select your name, brand, which flyers you are requesting and more. Once the form is filled out, click "submit." This will be sent to marketing, and they will get the flyers branded to YOU, approved by compliance and emailed to you.

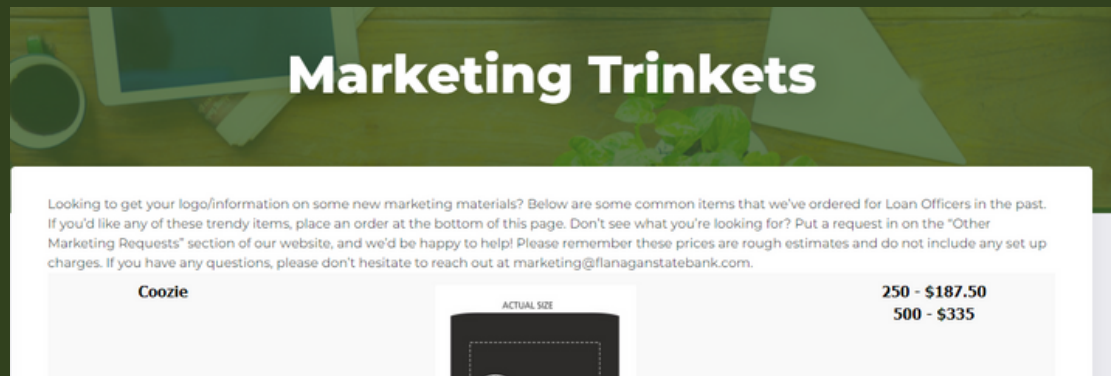
# REQUESTING MARKETING TRINKETS

1



From the home page, click on "Marketing Trinkets". This section is filled with items that we've previously ordered for Loan Officers.

2



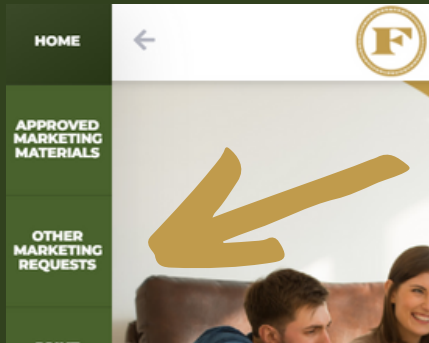
On this page, you will see multiple items that we can order for you! We can add your logo / information on them and place the order. We've also listed pricing, so you can know if it's within your budget.

3

At the bottom of this page, there is a form you can fill out. Here you will enter your name, brand, and which marketing trinkets you'd like to be ordered. We will get the request and reach out if we have any questions.

# REQUESTING ALL OTHER MARKETING MATERIALS

1



From the home page, click on "Other Marketing Requests." This section is where you will go to request any other marketing materials. Examples of what you can request includes business cards, yard signs, advertisements, and more!

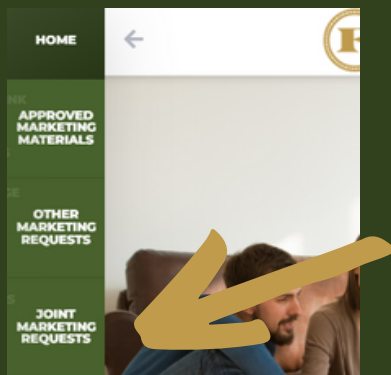
2

A screenshot of the 'Other Marketing Requests' form. The form has a white background and a grey border. It contains the following fields: 'Select MLO \*' with a dropdown menu, 'Brand \*' with a dropdown menu, and 'Select your Sales Manager \*' with a dropdown menu. Below these fields is a section titled 'Material(s) Requested \*' with the instruction: 'Please be specific with your request. Please let us know any other helpful information.'

After clicking on "Other Marketing Requests," you will see this form. Fill out the required sections and please be as specific as possible! Being specific will help your request move along quicker. After filling out the form, hit "submit" and it will be sent to the marketing team to get started.

# JOINT MARKETING REQUESTS

1



From the home page, click on "Joint Marketing Requests." This section is where you will go to get approval of joint marketing. It is required to get approval from our compliance team before finalizing joint marketing.

2

A screenshot of the 'Joint Marketing Form'. The form has a white background and a grey border. It contains the following fields: 'Select MLO \*' with a dropdown menu and 'Brand \*' with a dropdown menu.

This tab will bring you to the Joint Marketing form. Please fill this form out and hit "Submit" when finished. This will be sent to compliance for approval. From there you will be emailed with approval or denial.

# MARKETING RESOURCES

1



From the home page, click on "Marketing Resources." This section filled with helpful marketing resources!

2

Click on a topic below to learn more! Can't find what you're looking for? Email [marketing@flanaganstatebank.com](mailto:marketing@flanaganstatebank.com) and we will help you!

Advertising and Marketing Policy & Procedures

Examples of Unacceptable Advertising

Pre-Approved Wording for Shared Posts

Following RESPA Rules

This tab will take you to a screen with different documents you can click on. Simply click on the topic you want to learn more about!

# BUSINESS CARD ORDER

1

If you would like to order or reorder business cards, please click on the "Business Card Order" on the left side bar.



## Business Card Order

Select MLO \*

Select

Brand \*

Select

2

This will take you to our business card order form, which we ask that you fill out and submit! We will then email you a proof of your card and then we will get them ordered for you.

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# SOCIAL MEDIA POST

1



If you would like to post to your social media page, select “Social Media Post” in the left menu bar.

2

A screenshot of a web form titled 'Social Media Post'. The form includes a header with the title, a paragraph of instructions, and a dropdown menu labeled 'Select MLO'. A yellow arrow points to the form area.

This will take you to a form to fill out. From here, you will be able to select your name, which page you want to post to, you will be able to add your caption and upload any attachments you want posted. We will get this submission and then post it to your page for you. We do this so our compliance department can approve of the content before it's posted.



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