

Contact Relationship Management (CRM)

The Contacts section of Bryt is a CRM (Contact Relationship Management) tool for our users. What is CRM? At its simplest definition, a CRM system allows businesses to manage business relationships and the data and information associated with them. Business relationships or contacts in the Bryt system can be Investors, Borrowers, Real Estate Agents, Insurance Agents, Escrow Agents or any other individual or company that you work with.

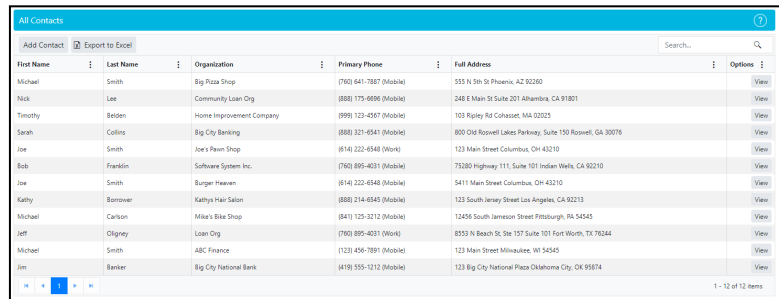
The contact record in the **Bryt Basic Loan Tracker** includes:

- **Contact Information** (Name, Company, Address, Phone, Email, Notes, etc)
- Links to the **Loan List** that the contact is involved in
- **User Notes** – notes about interactions with the contact
- **Email** - log of emails sent to the contact
- **Files** associated with the contract.

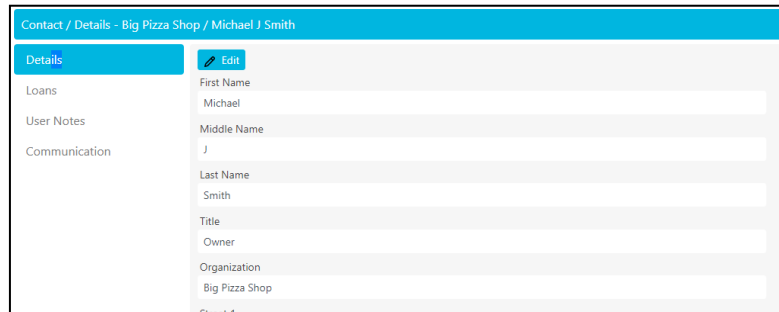
Since this data is stored in the Bryt cloud, the information is available to all your users, in real time. This facilitates your ability to share information across various teams within your own organization who contact the same customers.

As you grow, the Bryt CRM can quickly expand to include more sophisticated features including:

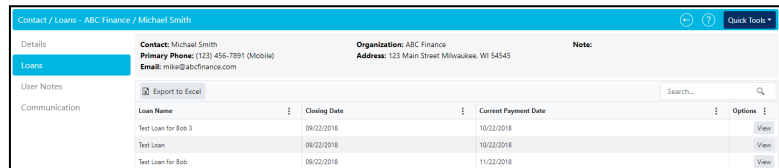
- **Custom Defined User Fields**
- **Online loan applications**
- **Banking Information**



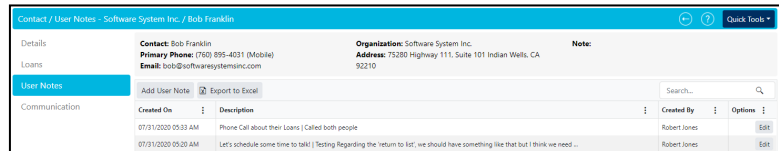
First Name	Last Name	Organization	Primary Phone	Full Address	Options
Michael	Smith	Big Pizza Shop	(760) 641-7887 (Mobile)	555 N 5th St Phoenix, AZ 92260	View
Nick	Lee	Community Loan Org	(888) 175-6886 (Mobile)	248 E Main St Suite 201 Alhambra, CA 91801	View
Timothy	Belden	Home Improvement Company	(999) 123-4567 (Mobile)	103 Ripley Rd Cohasset, MA 02025	View
Sarah	Collins	Big City Banking	(888) 321-6541 (Mobile)	800 Old Roswell Lakes Parkway, Suite 150 Roswell, GA 30076	View
Joe	Smith	Joe's Pawn Shop	(614) 222-6548 (Mobile)	123 Main Street Columbus, OH 43210	View
Bob	Franklin	Software System Inc.	(760) 895-4031 (Mobile)	75280 Highway 111, Suite 101 Indian Wells, CA 92210	View
Joe	Smith	Burger Heaven	(614) 222-6548 (Mobile)	5411 Main Street Columbus, OH 43210	View
Kathy	Borrower	Kathy's Hair Salon	(888) 214-6545 (Mobile)	123 South Jersey Street Los Angeles, CA 90213	View
Michael	Carlson	Mike's Bike Shop	(641) 125-3212 (Mobile)	12456 South Jameson Street Pittsburgh, PA 54545	View
Jeff	Olligrey	Loan Org	(760) 895-4031 (Mobile)	8553 N Beach St. Ste 157 Suite 101 Fort Worth, TX 76244	View
Michael	Smith	ABC Finance	(123) 456-7891 (Mobile)	123 Main Street Milwaukee, WI 54545	View
Jim	Banker	Big City National Bank	(419) 555-1212 (Mobile)	123 Big City National Plaza Oklahoma City, OK 93874	View



Details	Edit
Loans	First Name Michael
User Notes	Middle Name J
Communication	Last Name Smith
	Title Owner
	Organization Big Pizza Shop



Details	Contact: Michael Smith	Organization: ABC Finance	Note:
Loans	Primary Phone: (123) 456-7891 (Mobile) Email: mike@abcfinance.com	Address: 123 Main Street Milwaukee, WI 54545	
User Notes	Export to Excel		
Communication	Loan Name	Closing Date	Current Payment Date
	Test Loan for Bob	09/22/2018	10/22/2018
	Test Loan	09/22/2018	10/22/2018
	Test Loan for Bob	09/22/2018	11/22/2018



Details	Contact: Bob Franklin	Organization: Software System Inc.	Note:
Loans	Primary Phone: (760) 895-4031 (Mobile) Email: bob@softwaresysteminc.com	Address: 75280 Highway 111, Suite 101 Indian Wells, CA 92210	
User Notes	Add User Note Export to Excel		
Communication	Created On	Description	Created By
	07/31/2020 09:33 AM	Phone Call about their Loans Called both people	Robert Jones
	07/31/2020 09:20 AM	Let's schedule some time to talk Testing Regarding the 'return to list', we should have something like that but I think we need ...	Robert Jones