

SMART ACTIONS

The CRM update comes to you — by text, right after the call.

COMPANION ONE-PAGER TO MIKE'S VIDEO WALKTHROUGH

WHAT IT DOES

01 · APPROVE BY TEXT

Stage updates

If the call indicates the stage should change, you get a text. Tap **Yes** to approve, **No** to decline.

Zillow buyer lead stages only, for now.

02 · APPROVE BY TEXT

Appointments

If a follow-up appointment was agreed on the call, you get a text suggesting you create it. Tap **Yes** or **No**.

A reminder follows in 2 hours if you don't reply.

03 · AUTOMATIC

Timeframe to move

If the buying or selling timeline changed, FUB updates the timeframe itself — no text to approve.

Every change appears in the change log.

It doesn't fire after every call — only when one of the three is detected.

HOW IT WORKS

- 1 You finish a call made through your **FUB phone number**.
- 2 AI reviews the transcript and decides whether a stage, appointment, or timeframe change is needed.
- 3 You get a text for stages and appointments — **reply Yes or No**. Timeframe updates apply on their own.
- 4 Approved and automatic updates appear in the lead's **change log**.

SPOTTING IT ON THE LEAD RECORD

"Updated by FUB" — purple on the timeline means a field was last set by smart actions. Click through to the change log: entries carry a purple wand, and field updates can be undone there.

"Created by FUB" — appointments made by smart actions say so in the appointment description field.

WHAT THE TEXT LOOKS LIKE

FOLLOW UP BOSS · 855-672-9245

Do you want us to update the lead stage for **Sarah Chen** from: Lead → Appointment Set?

Yes / No

Reply **Yes** and FUB confirms the update with a link to the lead profile.

BEFORE IT'LL WORK

- ✓ **FUB Calling** — calls must be placed through your FUB phone number.
- ✓ **Call recording power-up** — account-owner setting; it's what lets FUB generate the transcript.
- ✓ **Zillow two-way integration** — active, and enabled by your team lead.

Smart actions only runs for leads in a **Zillow stage**. A lead moved to a custom stage (e.g. Vendor) gets no suggestions.

NEVER REPLY "STOP" — NEVER BLOCK 855-672-9245

Why: STOP opts you out at the carrier level and blocking hides texts on your device — both stop **all** FUB texts, new lead alerts included.

If it happened: unblock first (iPhone: Settings → Phone → Blocked Contacts · Android: Phone app → Settings → Blocked Numbers), then text **START** to 855-672-9245.

The right way off: agents — uncheck "FUB suggests a CRM update" in Notification Settings. Admins — Admin → AI Settings, toggle off for the team.