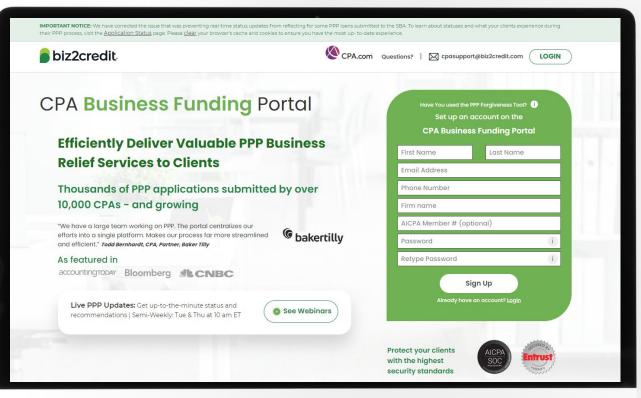


Live PPP Service Updates



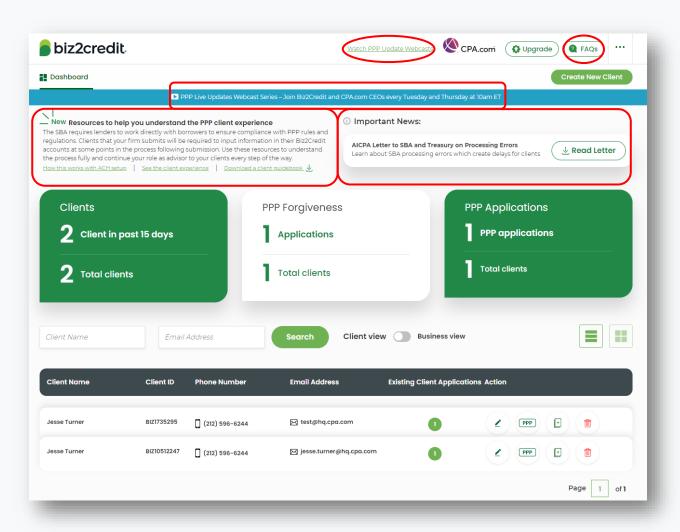




Operational Updates From CPA Business Funding Portal Customer Care

Resource Hubs: Portal Dashboard & CPA.com/PPPResources

Portal Dashboard



CPA.com/PPPResources



PPP Information

Portal Help

Semi-weekly webcast: important highlights and commentary

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Registration & Archives

Our Customer Care Teams

Customer Service Managers

Email Support Available from 8AM-8PM ET cpasupport@biz2credit.com

CSRs are here to assist you with common "tier 1" support questions related to use of the loan portal as well as help direct you to additional customer care resources. CSRs are **NOT** able to expedite the funding process or clear SBA error/hold codes on applications.

- Status of applications
- Process workflow questions
- How to upload ACH/bank info

Biz2Credit Funding Specialists

Assigned to applications in queue to facilitate funding process

Please be patient with questions requiring funding specialist attention. The team is extremely busy and working as quickly as possible to address application requirements and process lending agreements. Expect one-way communication from funding specialists as they work through hundreds of applications each.

- "More Information Needed" Status
- Loan amount discrepancies
- Delivery of loan agreement documents to borrowers

Top Customer Support Inquiries

There is a discrepancy in the amount on my loan agreement vs my application, what do I do?

Issues with application qualification amounts will need to be retracted from the SBA system and resubmitted. This is a very specialized activity and requires a funding specialist's involvement to ensure the SBA system reflects correctly all application data that needs to be amended.

Any late-stage changes that are required to an application or a qualification amount will require significant processing time. Please be aware of this and advise clients accordingly.

Top Customer Support Inquiries

My client's application status is "Contract Pending" but they have not received the contract, what do I do?

Contracts are generated and sent from DocuSign, Biz2Credit's third-party e-signature system. Clients should always first check their inbox and junk folder for emails coming from docusign.net.

If the client cannot find a loan agreement in their inbox, first ensure that you've allowed at least a 48-hour timeframe to elapse before reaching out. Contracts are generated in batches due to extremely high processing volumes, and it can take time before your client has received the link, even if the contract is already generated (due to third-party system processing times).

Once this timeframe has elapsed you or the client can reach out to the assigned funding specialist with a request for further information. Funding specialists are handling large numbers of applications, so they will identify if any further requirements are outstanding which may have delayed contract generation, or else will work with the contracts team to advance the application. Your client will receive the DocuSign link shortly.



Top Technology Support Inquiry

How do I reset my password?

Firm User Cannot Log-in:

- Super Admin can resend the email verification link.
- If user still does not receive after checking spam/junk folders, reach out to Tech support.

Client Has Not Received Email To Access Their Profile:

- Client can go to biz2credit.com > click log in at top right > click "Forgot Password" (Email will be sent to client with further instructions.)
- If client received error with the provided email address, reach out to Tech support.

CONTACT

Email Biz2Credit Tech. Support at: techhelp@biz2credit.com

Firms can also reach out to tech. support for portal access issues.

Before you contact support, see if your firm admin still needs to resend the verification link.



Customer Service & Communication Plan

Contact Us

Service Inquiries about the Portal email address on your portal

PPP Guidance from AICPA pcps@aicpa.org

Technical Issues (e.g. Login) technelp@biz2credit.com

Find Resources

Check for frequent **emails** from cpa@biz2credit.com that highlight Portal updates and processing information for CPAs

View resources and videos on your CPA Business Funding Portal dashboard

Join us twice a week in these live update webinars

Faster Processing



inquiries answered every day.

Join us on Thursday at 10am ET

