



# New Client Bootcamp



# 2026 CHARLESTON



SUCCESS SUMMIT  
**CHARLESTON**



Tuesday and Wednesday  
May 19<sup>th</sup> & 20<sup>th</sup> 2026



The Charleston Gaillard Center  
95 Calhoun St, Charleston, SC 29401

# New Ylopo Client Training Guide

## Self Paced Training



Welcome to Ylopo



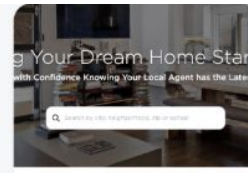
Ylopo Stars



Mission Control



Ylopo Marketing For You



Home Search Site



Ylopo Branded Sites



Ylopo & Lofty (formerly Chime)

## Live Training



EVERY OTHER WEDNESDAY  
AT 12PM PST

[bit.ly/YourYlopoAccountGoesLive](https://bit.ly/YourYlopoAccountGoesLive)



Thursday 10AM - 12PM PST  
Friday 10AM - 12PM PST

[bit.ly/Go-Live-Training](https://bit.ly/Go-Live-Training)



Every Monday, Tuesday,  
Thursday and Friday

9:00 AM Pacific Time  
(US and Canada)

[bit.ly/Coach-Office-Hours](https://bit.ly/Coach-Office-Hours)

HOST  
Matt Croteau  
Ylopo Coach

HOST  
Chris Phares  
Ylopo Coach

HOST  
Jim Hill  
Ylopo Coach

HOST  
Marissa Canario  
Ylopo Coach



Implementation:  
License Launch, CRM + Ylopo  
Integration



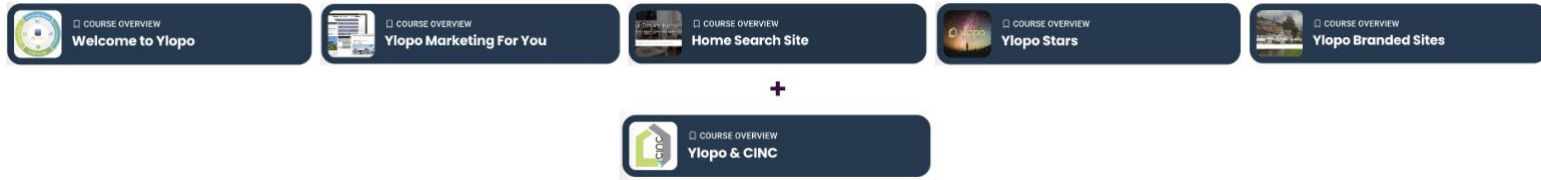
Onboarding:  
CRM + Ylopo, Ylopo Stars



Onboarding:  
Lead conversion

# New Ylopo **Agent** Training Guide

## Self Paced New User Training



## Live Training



Getting started with Ylopo



Engage and nurture database using Stars



Lead Conversion

# Graduation to Onboarding Phase (60 days)

## Onboarding Kickoff Call: Launching Your Growth

- Your Vision, Your Goals
- Building the Foundation
- AI as Your Co-Pilot
- Defining Your Stages & Processes

## Onboarding 2: Powering Your Playbook

- Stars to engage
- Seller Suite
- Database Imports
- Agent Transitions Made Simple

## Onboarding 3: Maximizing Your Toolkit

- Agent Power Tools
- AI Performance Review
- Support at Your Fingertips
- Optimization

**Please attend these meeting for optimal account set up!**

# AGENDA

**01**

## **PART 1**

- CRM, Agent and Ylopo Role in Successful Lead Conversion
- Ylopo Stars + CRM Integration Review
- Ylopo Notifications
- Best Practices for Organizing CRM for Agent Follow Up

**01**

## **Q&A**

Break

**02**

## **PART 2**

- In depth review of Ylopo Stars

**02**

## **Q&A**

End

# Building a Successful CRM database to nurture and convert

## CRM

Where you manage your leads  
day-by-day



- Your CRM receives, routes and helps organize your leads
- Create smart lists or smart filters
- Run action plans and automations
- Centralize your communication with your leads and clients here

## Agent

Manages the relationship to  
turn prospects into Clients



- Prospects
- Qualifies
- Advises
- Provides value
- Drives Conversion
- Builds & Nurtures Relationships
- Works leads in CRM

## Ylopo

Supercharge Your Real Estate  
Business with Smart Lead  
Nurturing and Conversion Tools



- Lead Generation
- Remarketing
- AI Assistants
- Home Search Site, Branded Site
- Agent tools
- Training & Coaching



# Ylopo + CRM Integration Review

Visit our Ylopo Support Center for more information on the  
Ylopo + CRM integration

# Ylopo + CRM Integration

## Ylopo



## CRM



- ❑ Online Lead Generation
- ❑ AI Text Assistant
- ❑ AI Voice Assistant
- ❑ Social Media Retargeting
- ❑ IDX Home Search Site
- ❑ Stars: Nurture tools
- ❑ Branded site: Conversion Tools
- ❑ Priority Notification System
- ❑ Training and Coaching on Ylopo tools and lead conversion

- ❑ Leads are delivered, routed
- ❑ Create organized workflows and follow up lists for prospecting and nurturing
- ❑ Leads and contacts worked by agents - calls, texts, emails logged
- ❑ Database nurtured by campaigns
- ❑ Reporting to track deals
- ❑ Automations for campaigns and repetitive activity
- ❑ CRM Training

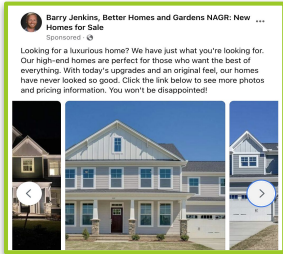
**Complete your online training to learn about your specific CRM's integration with Ylopo**

[Visit our Help Center for more articles on the CRM + Ylopo integration](#)

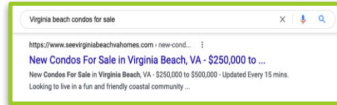
# CRM + Ylopo (Stars): Sources

**Ylopo  
Lead  
Source:**

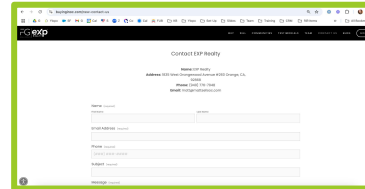
**Home Search Site:  
organic, Facebook**



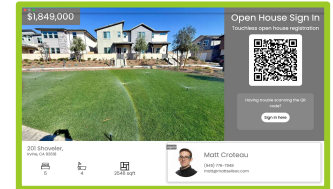
**Home Search  
Site: Google  
Ads/PPC**



**Branded Site:  
Organic, Branded  
Sites Tools Page  
Tools**



**Branded Site Open  
House Tool**



**Ylopo  
Source  
Name  
in FUB:**

- Ylopo Buyers
- Ylopo Sellers
- Direct Connect FB

- Ylopo Adwords
- Direct Connect PPC
- Ylopo LSA

- Branded Website

- Open House (Ylopo)

# CRM + Ylopo (Stars): Sources

The screenshot displays the Ylopo CRM Admin interface. The top navigation bar includes links for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin (highlighted with a green box). A search bar is located to the right of the Admin link. Below the navigation bar, the 'Lead Flow' tab is selected and highlighted with a green box. The main content area shows a list of lead sources. A green callout box labeled 'New Ylopo Lead Sources' with an arrow points to the first source, 'Ylopo Seller'. The list includes three sources: 'Ylopo Seller', 'Ylopo', and 'Branded Website'. Each source entry shows the last lead, the time ago, and the number of leads. The 'Ylopo' and 'Branded Website' sources have a green box around their details. Below the list, there are settings for Distribution, Lender, and Action Plan for each source.

**Admin** Search

Overview **Lead Flow** Groups Team Action Plans Automations Ponds Email Templates Text Templates Import Phone Numbers More [How Lead Flow works](#)

[Learn about Lead Routing](#) and [Advanced Lead Flow Rules](#)

Unarchived [+ Add Lead Flow](#)

**New Ylopo Lead Sources**

**Ylopo Seller** • Sellers • Ge Juefeng (API)  
Last lead • [Ken Mackey](#) • 15 hours ago • 1,962 leads  
[Advanced Settings](#) • (4) [Archive](#)

**Ylopo** • Buyers • Ge Juefeng (API)  
Last lead • [Julie TagPonds](#) • 18 hours ago • 11,489 leads  
[Advanced Settings](#) [Archive](#)

**Branded Website** • Buyers • Ge Juefeng (API)  
Last lead • [Jackson Core](#) • 3 days ago • 2,283 leads  
[Advanced Settings](#) [Archive](#)

[View Advanced Rules \(4\)](#)

Distribution	Ylopo AI-Ylopo Call Cen...	Lender	No assigned lender	Action Plan	No action plan
Distribution	Ge Juefeng (default)	Lender	No assigned lender	Action Plan	Professor Barry Ylopo 2...

FUB users: Ylopo will only set up lead distribution for AI Voice eligible lead sources based on your AI Voice set up.

# CRM + Ylopo (Stars): Custom Field

The screenshot displays a CRM interface with a lead profile for Vanessa. The interface includes a top navigation bar with tabs for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin. The left sidebar shows the lead's details, including their name, last communication time, and various tags. A green callout box with the text "Link to Stars Profile" points to a "Custom Fields" section at the bottom left of the sidebar. This section contains a field labeled "Ylopo Stars Link" with the URL <https://stars.ylopo.com/lead-detail/5329a519-1b77...>. The main content area shows a conversation history with Matt Croteau, including a message about a previous email and a link to an action plan. The right sidebar displays activity, tasks, and Ylopo AI settings.

Vanessa  
Last Communication 16 hours ago

Create Note Send Email Messages Log Call

Add notes or type @name to notify

Create Note

Background  
Add background

Details

Stage Lead

Source Ylopo Adwords, 2 days ago

Agent Shark Tank (Matt Croteau)

Lender

Price \$465,000

Tags 92708 appinvt BUYER

do\_you\_own\_a\_home=No DYNAMIC\_REG\_ADDRESS

Fountain Valley Lead Day15-Audit PPC\_GEO

preapproved\_for\_loan=No self\_before\_buy=No

timeline=within 90 days VOICEMAIL

YLOPO\_ADWORDS YLOPO\_AI\_VOICE

Custom Fields

--IMPORTANT--

Ylopo Stars Link <https://stars.ylopo.com/lead-detail/5329a519-1b77...>

Link to Stars Profile

Matt Croteau > Vanessa  
Sep 18

Ylopo AI Voice  
Voicemail  
18/24 03:26 PM PDT

Matt Croteau > Vanessa  
Sep 18 via action plan

Do you have an opinion on this?

Hey Vanessa, Did you see my previous email? One of the questions I wanted to ask you was if anyone

View action plan email

Ylopo > Vanessa  
Sep 18

Raiya Conversation

Activity

MARKETING SOURCE

AdWords

AT A GLANCE

465K 1 572sf 1

92708

View on Ylopo Adwords

Tasks

No upcoming tasks

Appointments

Ylopo AI

YLOPO AI TEXT

Ylopo AI is paused

Resume

Drip and behavioral texts are enabled

Stop

YLOPO AI VOICE

Ylopo AI Voice is calling lead

Last Call 09/18/2024

Outcome Voicemail

Agents can access Ylopo Stars via Stars Link to manage Ylopo tools

# CRM + Ylopo (Stars): Custom Field

The image displays a CRM interface for Ylopo (Stars). On the left, a sidebar shows a list of leads, with a green box highlighting a 'Custom Fields' section containing a link to a lead profile. A green arrow points from this link to the main lead detail view on the right. The main view shows the lead's information, including first and last name, email, and creation date. It also features a 'Lead Message Inbox' and an 'Agent Toolkit' with various actions like 'Create Push Listing(s)', 'Create New Search and Listing Alerts', and 'Opt Lead OUT of Priority Alerts'. The interface is clean and modern, with a green and white color scheme.

**Link to Stars Profile**

**LEAD INFORMATION**

First Name: Vanessa  
Last Name: [Redacted]  
Email: [Redacted]  
Created: 9/17/24 5:11pm CDT  
Edit

**LEAD DETAILS**

Details  
LEAD TYPE: BUYER  
Follow Up Boss  
STAGE:

**AVG PRICE**  
**LAST VISIT** 2 days ago  
**LISTINGS VIEWED** 0  
**TOTAL VISITS** 1

**Lead Message Inbox (2 New)**

**Agent Toolkit**

Create Push Listing(s)  
Create New Search and Listing Alerts  
Create New Seller Alert  
Opt Lead OUT of Priority Alerts  
Ylopo RAIYA AI is texting lead  
Drip and behavioral texts are enabled  
Opt lead OUT of all listing alerts

**Saved Search & Listing Alerts**

**Live Chat**

Stars is Ylopo's database marketing tool that integrates with your CRM, giving you a powerful way to engage, nurture and track home buyer and seller activity from your new leads to past clients.

# CRM + Ylopo (Stars): Stage

The screenshot displays a CRM interface with a lead profile for Vanessa. The interface includes a top navigation bar with options like People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin. The lead profile shows contact information, a background image, and a details section. A green box labeled "Stage" points to the "Stage Lead" section in the details panel. The details panel lists various attributes such as Source (Ylopo Adwords), Agent (Shark Tank), Lender, Price (\$465,000), and Tags (92708, appinve, BUYER, etc.). The main communication area shows a conversation with Matt Croteau, including a call outcome and a message about an action plan. The right sidebar displays activity, tasks, appointments, and Ylopo AI settings.

**Stage**

**Details**

**Stage Lead**

Source Ylopo Adwords, 2 days ago

Agent Shark Tank (Matt Croteau)

Lender

Price \$465,000

Tags 92708 X appinve X BUYER X

do\_you\_own\_a\_home-No X DYNAMIC\_REG\_ADDRESS X

Fountain Valley X Lead-Day15-Audit X PPC\_GEO X

preapproved\_for\_loan-No X sell\_before\_buy-No X

timeline-within 90 days X VOICEMAIL X

YLOPO\_ADWORDS X YLOPO\_AI\_VOICE X

**Custom Fields**

**--IMPORTANT--**

Ylopo Stars Link <https://stars.ylopo.com/lead-detail/5329a519-1b7...>

**Activity**

MARKETING SOURCE

AdWords

AT A GLANCE

465K 1 572sf 1

92708

View on Ylopo Adwords

**Tasks**

No upcoming tasks

**Appointments**

**Ylopo AI**

**YLOPO AI TEXT**

Ylopo AI is paused

Drip and behavioral texts are enabled

**YLOPO AI VOICE**

Ylopo AI Voice is calling lead

Last Call 09/18/2024

Outcome Voicemail

**Communication Log**

**Matt Croteau > Vanessa**  
Sep 18

Call outcome from AI Voice  
Call Disposition: Voicemail  
Time of Call: 09/18/24 03:26 PM PDT

**Matt Croteau > Vanessa**  
Sep 18 via action plan

Do you have an opinion on this?

Hey Vanessa, Did you see my previous email? One of the questions I wanted to ask you was if anyone

[View action plan email](#)

**Ylopo > Vanessa**  
Sep 18

[Raiya Conversation](#)

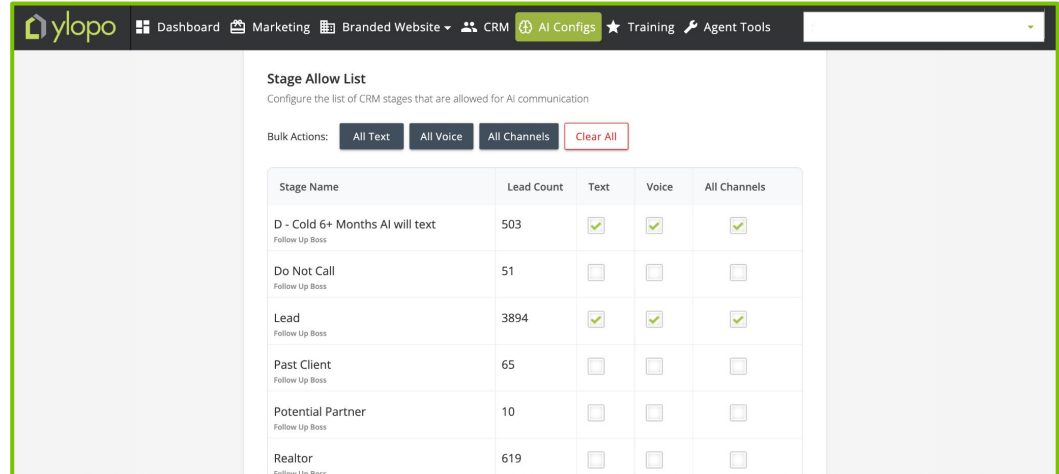
AI blocked or allowed

# CRM + Ylopo (Stars): Stage

## AI

### Recommended blocked stages

- Appointment Set
- Hot
- Active
- Past Clients
- Closed



The screenshot shows the Ylopo AI Configs interface. The top navigation bar includes links for Dashboard, Marketing, Branded Website, CRM, AI Configs (active), Training, and Agent Tools. The main section is titled "Stage Allow List" with a subtitle "Configure the list of CRM stages that are allowed for AI communication". Below this, there are "Bulk Actions" buttons: "All Text", "All Voice", "All Channels", and "Clear All". A table lists various CRM stages with columns for "Stage Name", "Lead Count", "Text", "Voice", and "All Channels". The table includes stages like "D - Cold 6+ Months AI will text", "Do Not Call", "Lead", "Past Client", "Potential Partner", and "Realtor". Checkmarks in the "Text", "Voice", and "All Channels" columns indicate which communication methods are allowed for each stage.

Stage Name	Lead Count	Text	Voice	All Channels
D - Cold 6+ Months AI will text <small>Follow Up Boss</small>	503	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Do Not Call <small>Follow Up Boss</small>	51	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead <small>Follow Up Boss</small>	3894	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Past Client <small>Follow Up Boss</small>	65	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Potential Partner <small>Follow Up Boss</small>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Realtor <small>Follow Up Boss</small>	619	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Let your Implementation Specialist know if you need to review or make changes before launch,
- You'll be able to adjust your stage settings in Mission Control once live

# CRM + Ylopo (Stars): Assigned Agent

The screenshot displays a CRM interface with a top navigation bar including 'People', 'Inbox', 'Tasks', 'Calendar', 'Deals', 'Reporting', and 'Admin'. A search bar is located on the right. The main content area is divided into three columns:

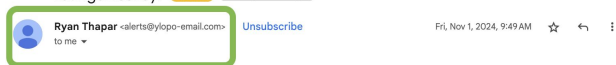
- Left Column (Lead Profile):**
  - Header:** Vanessa, Last Communication 5 days ago.
  - Background:** Add background.
  - Details:**
    - Stage:** Lead
    - Source:** Ylopo Adwords, 2 months ago
    - Agent:** Me (highlighted with a green box and a green arrow from the 'Assigned Agent' label)
    - Lender:**
    - Price:** \$465,000
    - Timeframe:**
    - Tags:** 92708, appinville, BUYER
    - do\_you\_own\_a\_home:** No
- Middle Column (Communication Log):**
  - Actions:** Create Note, Send Email, Messages, Log Call.
  - Note Field:** Add notes or type @name to notify.
  - Filters:** All, 0, 2, 14, 3, 1, 6, 0.
  - Messages:**
    - Matt Croteau > Vanessa:** Nov 2. Call outcome from AI Voice. Call Disposition: Voicemail. Time of Call: 11/02/24 09:14 AM PDT.
    - Matt Croteau > Vanessa:** Oct 31 via automation.
- Right Column (Activity):**
  - MARKETING SOURCE:** AdWords.
  - AT A GLANCE:** 459K, 1, 572sf, 1.
  - 92708**
  - View on Ylopo Adwords**
  - Tasks:** No upcoming tasks.
  - Appointments:** No upcoming appointments.
  - Ylopo AI**
  - YLOPO AI TEXT**

Ylopo Listing and Seller Alerts, Presented by section on Home Search Site

# CRM + Ylopo (Stars): Assigned Agent

## Listing Alerts/Seller Alerts

Your Home Value Report has been created, Gabiel! Also, there are 5 active listings nearby! [External](#) [New Agent Training](#) x



Hi Gabiel,

Here are the latest market trends in M8Y 4G9.

Don't want to receive these emails any more? [Unsubscribe here](#)

Click to unlock your estimated home value



## Ylopo Notifications to Agent

YLOPO URGENT PRIORITY LEAD: Miski Abdala requested an in-person tour of 3615 Zinnia Lane N, Plymouth, MN [View](#)

+ Summarize this email

notification@ylopo.com 11:18 AM (5 hours ago) ☆

PRIORITY LEAD ALERT: Miski Abdala

Phone Number: (763) 300-9297

Miski Abdala REQUESTED AN IN-PERSON TOUR for 3615 Zinnia Lane N, Plymouth, MN.

View in [Ylopo Stars](#)

Recommended actions:

1. Call/text the lead at (763) 300-9297 and ask them when they are normally free to look at 3615 Zinnia Lane N, Plymouth, MN
2. Also let them know you think there are some more in the area they might like too.
3. Connect with them!
4. Mark the Priority Lead task as "done" by clicking [here](#).
5. View lead in [Follow Up Boss](#) (mobile)

To prevent this lead from triggering a Priority Lead status in the future, [click here](#)

Contact us at [support@ylopo.com](mailto:support@ylopo.com) if you have any questions!

## (Optional) AI Text Assistant

Dec 10, 2024 at 12:14 am Ylopo

I just checked our database again and now we have 1 home shoppers searching for a home like yours. Isn't this fascinating [Ryan's assistant](#) w/ The Thapar Team.

## (Optional) Agent Home Search Site

A screenshot of a real estate listing page for '85 Wood Street Th5' in Toronto. The page shows the price '\$1,395,000', features like '4 Bedrooms', '3 Bathrooms', and '0 Lot sqft'. It includes a 'Schedule a tour' button and a 'Presented By' section for Ryan Thapar. A green arrow points to the browser address bar showing 'ryan.thaparteam.ca'.

# CRM + Ylopo (Stars): Lead Activity

The screenshot displays a CRM interface with a dark top navigation bar containing icons for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin, along with a search bar. The main content area is divided into three columns. The left column shows a profile for 'Vanessa' with a 'Last Communication 18 hours ago' status, contact icons, and details like 'Background' and 'Stage Lead'. The middle column features a 'Create Note' section with a text input field and a 'Create Note' button, and a list of activity items. A green box labeled 'Lead Activity' with an arrow points to a specific note: 'Registration from Ylopo page' with a truncated URL, a timestamp of 'Sep 17', an address '17200 Newhope Street 123, Fountain Valley, CA 92708', and various identifiers. The right column contains an 'Activity' panel with 'MARKETING SOURCE' (AdWords), 'AT A GLANCE' statistics (465K, 1, 572sf, 1, 92708), and a 'View on Ylopo Adwords' button. Below this are sections for 'Tasks' (No upcoming tasks), 'Appointments', and 'Ylopo AI' (paused).

**Lead Activity**

**Activity**

**MARKETING SOURCE**  
AdWords

**AT A GLANCE**  
465K 1 572sf 1  
92708

[View on Ylopo Adwords](#)

**Tasks**  
No upcoming tasks

**Appointments**

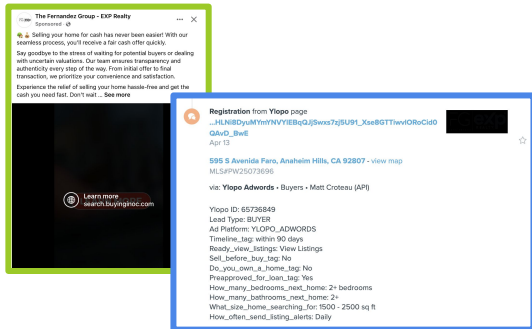
**Ylopo AI**  
Ylopo AI is **paused** [Resume](#)  
Drip and behavioral texts are **enabled** [Stop](#) [?](#)

**Registration from Ylopo page**  
...k3gSvGBKbLgOOEDxy7ZiiYXL3NY78v46RJxpfrBy51EqAahoCOR  
QQAaV\_D\_BwE  
Sep 17  
17200 Newhope Street 123, Fountain Valley, CA 92708 - [view map](#)  
MLS#OC24177900  
via: Ylopo Adwords • Buyers • Matt Croteau (API)  
Ylopo ID: 55665438  
Lead Type: BUYER  
Ad Platform: YLOPO\_ADWORDS

Activity from engagement with Ylopo ads, AI, websites and tools

# CRM + Ylopo (Stars): Lead Activity

## Ad Engagement



**The Hernandez Group - EXP Realty**  
Screened AP

Selling your home for cash has never been easier! With our seamless process, you'll receive a fair cash offer quickly. Say goodbye to the stress of waiting for potential buyers or dealing with uncertain valuations. Our team ensures transparency and authenticity every step of the way. From initial offer to final transaction, we prioritize your convenience and satisfaction. Experience the relief of selling your home hassle-free and get the cash you need fast. Don't wait - See more

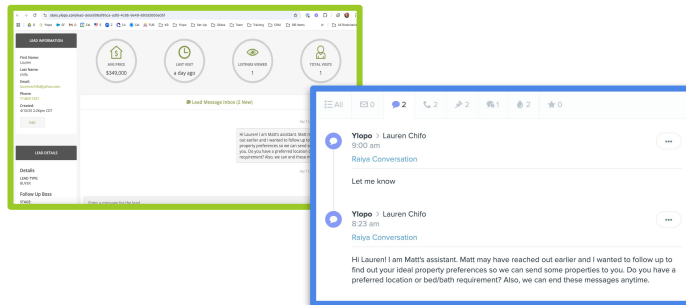
**Registration from Ylopo page**  
Hi Matt, I'm Lauren Chifo, a Ylopo agent. I'm excited to help you find your dream home. I've registered for Ylopo and I'm ready to get started. I've also registered for Ylopo and I'm ready to get started. I've also registered for Ylopo and I'm ready to get started.

**595 S Avenida Fero, Anaheim Hills, CA 92807 - view map**  
MLS# 250573586

via: **Ylopo Adwords** • Buyers • Matt Croteau (API)

Ylopo ID: 65726849  
Lead Type: BUYER  
Ad Platform: YLOPO\_ADWORDS  
Timeline: Lead within 90 days  
Ready: view, listings: View Listings  
Sell: before\_buy\_tag: No  
Do you own a home: tag: No  
Preapproved\_for\_loan: tag: Yes  
How\_many\_bedrooms\_next\_home: 2+ bedrooms  
How\_many\_bathrooms\_next\_home: 2+  
What\_size\_home\_searching\_for: 1500 - 2500 sq ft  
How Often want listing alerts: Daily

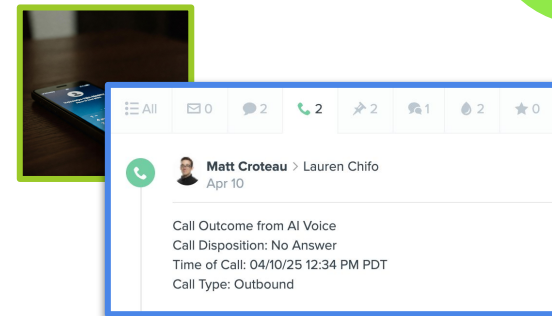
## AI Text



**Ylopo** - Lauren Chifo  
9:00 am  
Raya Conversation  
Let me know

**Ylopo** - Lauren Chifo  
9:25 am  
Raya Conversation  
Hi Lauren! I am Matt's assistant. Matt may have reached out earlier and I wanted to follow up to find out your ideal property preferences so we can send some properties to you. Do you have a preferred location or bed/bath requirement? Also, we can end these messages anytime.

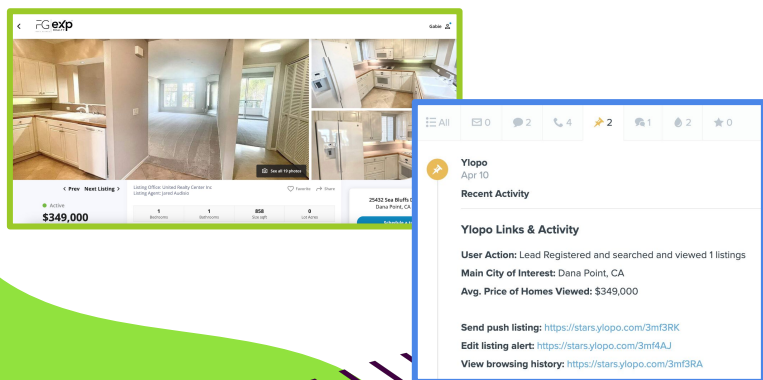
## AI Voice



**Matt Croteau** > Lauren Chifo  
Apr 10

Call Outcome from AI Voice  
Call Disposition: No Answer  
Time of Call: 04/10/25 12:34 PM PDT  
Call Type: Outbound

## Home Search Site Activity

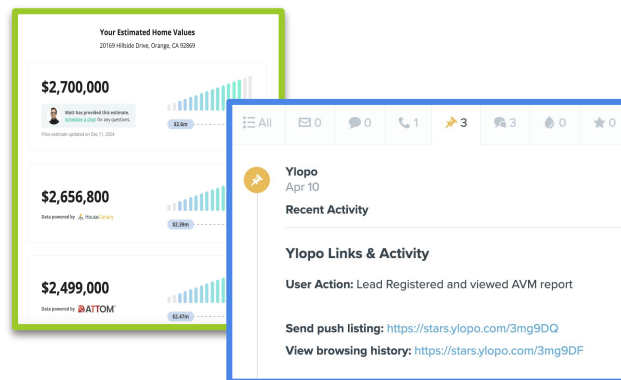


**Ylopo**  
Apr 10  
Recent Activity

**Ylopo Links & Activity**  
User Action: Lead Registered and searched and viewed 1 listings  
Main City of Interest: Dana Point, CA  
Avg. Price of Homes Viewed: \$349,000

Send push listing: <https://stars.ylopo.com/3mf3RK>  
Edit listing alert: <https://stars.ylopo.com/3mf4AJ>  
View browsing history: <https://stars.ylopo.com/3mf3RA>

## Seller Report & Listing Alerts



**Ylopo**  
Apr 10  
Recent Activity

**Ylopo Links & Activity**  
User Action: Lead Registered and viewed AVM report

Send push listing: <https://stars.ylopo.com/3mg9DQ>  
View browsing history: <https://stars.ylopo.com/3mg9DF>

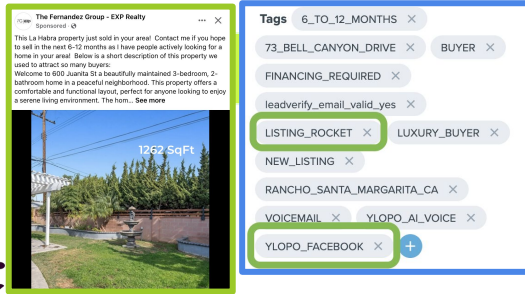
# CRM + Ylopo (Stars): Tags

The screenshot displays the Ylopo CRM interface for a lead named Vanessa. The interface includes a top navigation bar with options like People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin. The left sidebar shows the lead's details, including background, stage (Lead), source (Ylopo Adwords), agent (Matt Croteau), lender, and price (\$465,000). A green box highlights the 'Tags' section, which lists various tags such as '92708', 'appinvtite', 'BUYER', 'do\_you\_own\_a\_home-No', 'DYNAMIC\_REG\_ADDRESS', 'Fountain Valley', 'GHOST\_CALL', 'Lead-Day1-15-Audit', 'PPC\_GEO', 'preapproved\_for\_loan-No', 'sell\_before\_buy-No', 'timeline-within 90 days', 'VOICEMAIL', 'YLOPO\_ADWORDS', and 'YLOPO\_AI\_VOICE'. A green arrow points from a 'Tags' label to this section. The main content area shows a list of messages and calls from Matt Croteau to Vanessa, including a message about a dropped ball and a call outcome from AI voice. The right sidebar shows activity, marketing source (AdWords), and tasks.

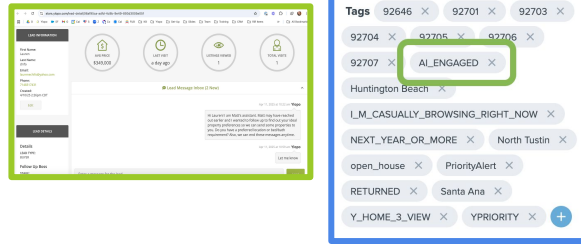
Tags will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database.

# CRM + Ylopo (Stars): Tags

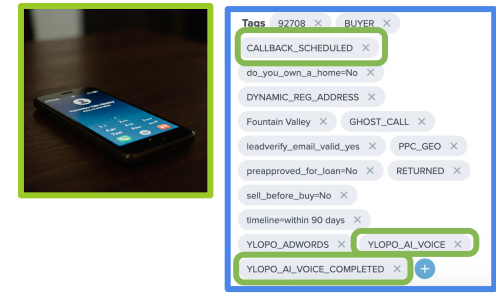
## Ad Engagement



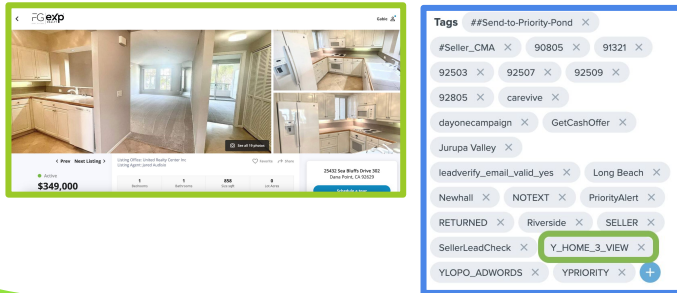
## AI Text



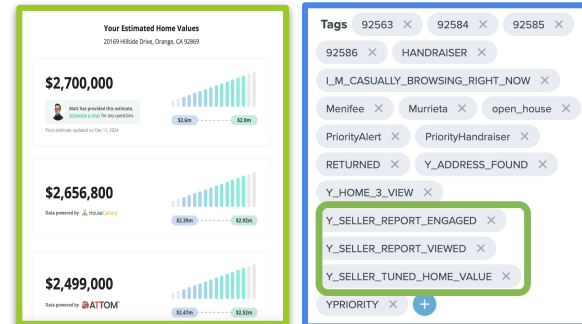
## AI Voice



## Home Search Site Activity



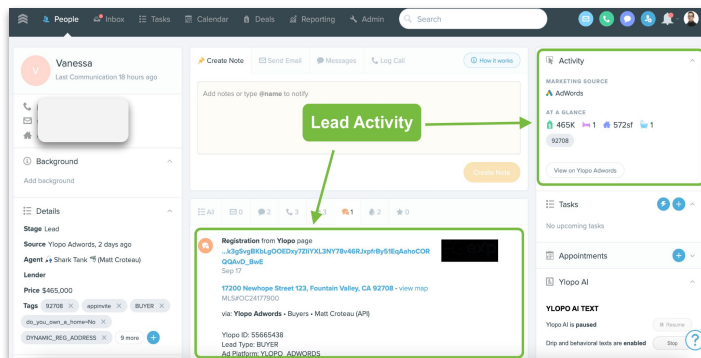
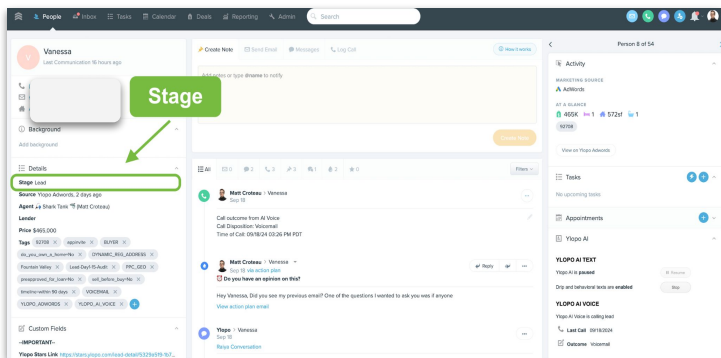
## Seller Report & Listing Alerts



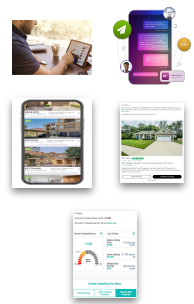
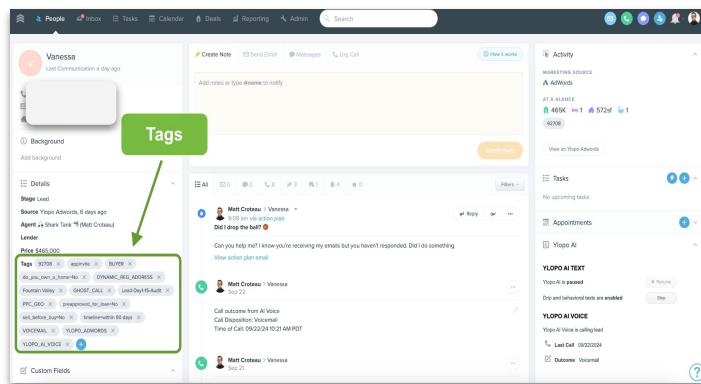
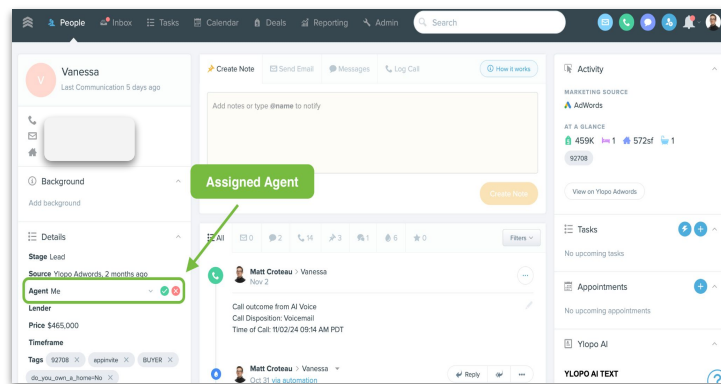
# CRM + Ylopo (Stars): Integration Review



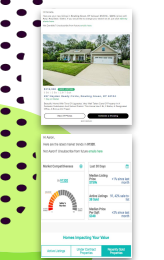
AI blocked or allowed



Activity from engagement with Ylopo ads, AI, websites and tools



Lead sources, registration responses, engagement with Ylopo sites, AI and tools



Ylopo Listing and Seller Alerts, Presented by section on Home Search Site

Complete your online training to learn about your specific CRM's integration with Ylopo




# **Ylopo Notifications to Agents**




The image shows a CRM interface with two main sections. The top section is a notification box with a green border. It contains the text: "Your seller lead Theresa bell has updated their home details in the ylopo seller report with a message: Inground Pool. View in CRM [https://apo.followwuboss.com/2/record/view/18258](\"https://apo.followwuboss.com/2/record/view/18258\")". The bottom section is a "PRIORITY LEAD ALERT" box, also with a green border. It contains the following information: "notification@ylopo.com to me • 10:36 AM (4 hours ago)", "PRIORITY LEAD ALERT: Theresa bell", "Phone Number: [redacted]", "Your seller lead Theresa bell has updated their home details in the ylopo seller report with a message: Inground Pool.", "New home details: 2 full bath(s)", "Previous home details: 0 full bath(s)", "2 tags Y\_SELLER\_REPORT\_ENGAGED and Y\_SELLER\_NEW\_HOME\_UPGRADES have been added to the lead.", "View in [Ylopo Sites](\"#\")", "• Mark the Priority Lead task as 'done' by clicking [here](\"#\").", "• View lead in [Follow Up Boss \(mobile\)](\"#\")", "To prevent this lead from triggering a Priority Lead status in the future, [click here](\"#\")", "Contact us at [support@ylopo.com](\"mailto:support@ylopo.com\") if you have any questions!


**Priority Email  
sent to agent**

**YLOPO URGENT PRIORITY LEAD:** Theresa bell provided their new home upgrades in the AVM report. [View x](#)

 notification@ylopo.com  
to me • 10:36 AM (4 hours ago) ☆

**PRIORITY LEAD ALERT:** Theresa bell

Phone Number: 

Your seller lead Theresa bell  has updated their home details in the ylopo seller report with a message: Inground Pool.

New home details: 2 full bath(s);  
Previous home details: 0 full bath(s);

2 tags V\_SELLER\_REPORT\_ENGAGED and V\_SELLER\_NEW\_HOME\_UPGRADES have been added to the lead.

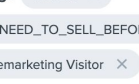
View in [Ylopo Sells](#)

- Mark the Priority Lead task as "done" by clicking [here](#).
- View lead in [Facebook Lead Box](#) ([facebook](#))

To prevent this lead from triggering a Priority Lead status in the future, click [here](#)

Contact us at [support@ylopo.com](mailto:support@ylopo.com) if you have any questions!

**Y**PRIORITY tag  
added on lead profile



The screenshot shows the 'Tags' audience selection interface. The 'Tags' tab is selected, and several filters are applied to narrow down the audience. The filters are displayed as chips with an 'X' to remove them. The filters include: 'BUYER', 'I\_NEED\_TO\_SELL\_BEFORE\_I\_CAN\_BUY', 'Remarketing Visitor', 'RETURNED', 'sell\_before\_buy=Yes', 'timeline=over 6 months', 'Y\_SELLER\_NEW\_HOME\_UPGRADES', 'Y\_SELLER\_REPORT\_ENGAGED', 'Y\_SELLER\_REPORT\_VIEWED', 'YLOPO\_FACEBOOK', and 'Y PRIORITY'. A green box highlights the 'Y PRIORITY' filter, and a blue plus icon is visible at the bottom right, indicating more filters can be added.

**Priority notes  
added to lead profile in CRM**

A screenshot of a web-based chat application. At the top, there is a navigation bar with icons for home, messages, calls, a plus sign, a profile, a lock, and a star, followed by a 'Filters' dropdown menu. Below the navigation bar, the chat header shows a yellow star icon, the name 'Ylopo', the time '8:36 am', and three status icons (edit, refresh, star). The main chat area has a 'Priority' label. A message from 'Ylopo' reads: 'Ylopo PRIORITY LEAD ALERT: Theresa bell [redacted]'. Below this, the chat history shows: 'Theresa bell [redacted] has updated their home details in the ylopo seller report.', 'New home details: 2 full bath(s);', 'Previous home details: 0 full bath(s);', 'Message: Inground Pool.', and '2 tags Y\_SELLER\_REPORT\_ENGAGED and Y\_SELLER\_NEW\_HOME\_UPGRADES have been added to the lead.' At the bottom, there are three instructions: 'To view seller report, click here.', 'To mark this task as complete, click here.', and 'To prevent this lead from triggering a Priority Lead status in the future, click here.' Below these is a link 'Get some script ideas here: http://bit.ly/Ylopo-Scripts' and a footer line 'Contact us at support@ylopo.com if you have any questions!'

# Ylopo Notifications: Responses to AI Texting

When someone responds to your AI text assistant, the assigned agent will receive a text and an email notification. Within the leads profile in the CRM a relevant AI text tag is applied in the tag section and the conversation is added to activity/notes section.

## Text notification sent to agent

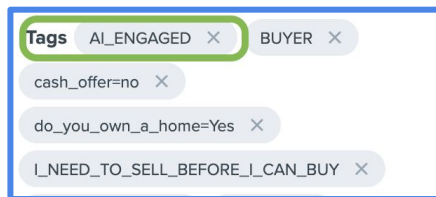
(424) 276-3699

We've texted Brenda Wheaton for you, and they replied "Hope to really get into searching in about 4 months are so if all works out ...don't want to waste your time...until I know what I can and can't do. I will get in touch. - Am looking at Boones Mill, Roanoke south side not in town, also Rocky Mount .. with 10 to 20 acres and a nice home.. but will get into that more when I know I can really search ." - see full thread: <https://stars.ylopo.com/1/8N7aY>

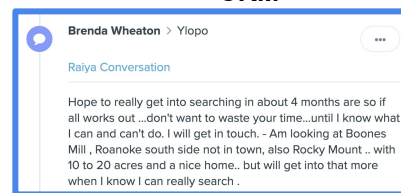
## Email notification sent to agent



## AI Text Tag added to CRM profile



## Conversation added to lead profile in CRM





# **Best Practices Ylopo + CRM**

Systemize Your Daily Workflows for Lead Conversion

## Ylopo Pro Tip: CRM Best Practices

- Create an SOP to work your database
- Time block to work your call lists, use a desktop/laptop to be efficient
  - Download CRM app for incoming calls and immediate outreaches to important activity
- Log ALL communication to leads in CRM
- Agent should be updating stages
- Add notes in background
- Use Ylopo tools to keep engaging leads
- Be consistent with routine

MORE CALLS = MORE CONVERSATIONS = MORE APPTS = MORE DEALS

# Ylopo Best Practice for Daily Lead Conversion

## 1) NEW

- Created < 10 days ago
- Tag excludes: Import
- Stage includes: Lead
- Last communication > 12 Hours

## 2) IMPORTANT

- Stage includes: Lead
- Tags include:  
*YPRIORITY, HANDRAISER, Y\_SELLER\_REPORT\_ENGAGED, Y\_SELLER\_REPORT\_VIEWED, call\_now="yes"*
- Last Communication > 1 day ago

## 3) AI Priority -

- Stage includes: Lead
- Tags include:  
*YLOPO\_AI\_PRIORITY*
- Last Communication > than 1 day ago

## 4) Recently Active

- Last Visit < 7 Days ago
- Last Communication > than 7 days ago

## 5) Nurture Priority

- Stage includes: Hot, Warm, and Cold, Past Client (nurture stages)
- Tags include: *YPRIORITY, HANDRAISER, Y\_AI\_PRIORITY, Y\_SELLER\_REPORT\_VIEWED*
- Last Communication > than 1 days ago

[View the recommended lists here](#)

# Ylopo Best Practice for Nurture

## 1) Hot stages - 1x/wk

- Stage: Includes Hot
- Last communication > 1 week

## 2) Warm stages - 2x/mo

- Stage: Includes Warm
- Last communication > 14 days

## 3) Cold stages - 1x/month

- Stage: Includes Cold
- Last communication > 30 days

## 4) Closed/Past stages - 1x/qtr

- Stage: Includes Past Clients, Closed
- Last communication > 3 months

[View the recommended lists here](#)

# Ylopo Additional Smartlists

## AI Voice Follow Up -

- Stage includes: Lead
- Tags:  
*AI\_VOICE\_NEEDS\_FOLLOW\_UP*
- Last Communication: More than 1 day ago

## No Stars Links -

- Ylopo Stars Link is: empty
- Email is: good

## Seller Engagement -

- Tags include:
- Y\_SELLER\_REPORT\_VIEWED
- Y\_SELLER\_REPORT\_ENGAGED

- [View our full list of Ylopo Tags to implement in your own smartlists/workflows](#)

Workflows/smartlists should fit your business needs. Meet with our Ylopo Coaches for help seeing what might best fit your needs using Ylopo!

# What all of this technology means for you...

Allows you to shape your business and workflow around what is important to you

1

Leads don't "slip through the cracks"

2

Identify and convert high intent buyers and sellers

3

Provide your clients and potential clients with access to valuable information and tools

4

Nurturing for leads and database in any stage

5

AND MORE!



**CRM**



**Agent**



**Ylopo**



## **CRM + Agent + Ylopo**

Maximize lead conversion and boost ROI by building and nurturing a healthy pipeline of deals in your CRM, managed through streamlined organization and automation, consistent branding, and proactive agent follow-up at every stage of the consumer sales journey

# QUESTIONS?

This Concludes 1 of 2 Part Ylopo Boot Camp Training

# AGENDA

**01**

## **PART 1**

- Ylopo's role in your business
- Ylopo + CRM Integration Review
- Ylopo Notifications
- Best Practices for Organizing CRM for Agent Follow Up

**01**

## **Q&A**

Break

**02**

## **PART 2**

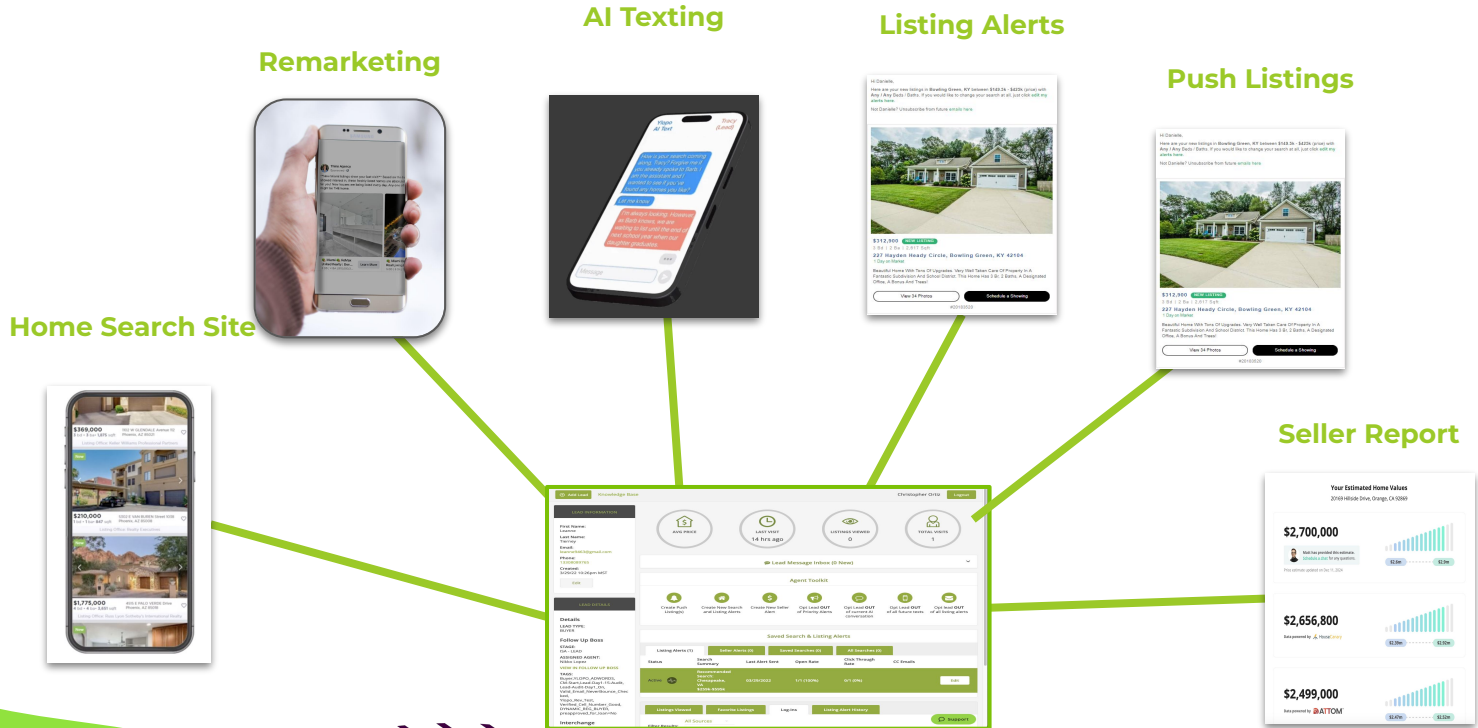
- Using Stars to engage and nurture leads
- Additional Training and Resources

**02**

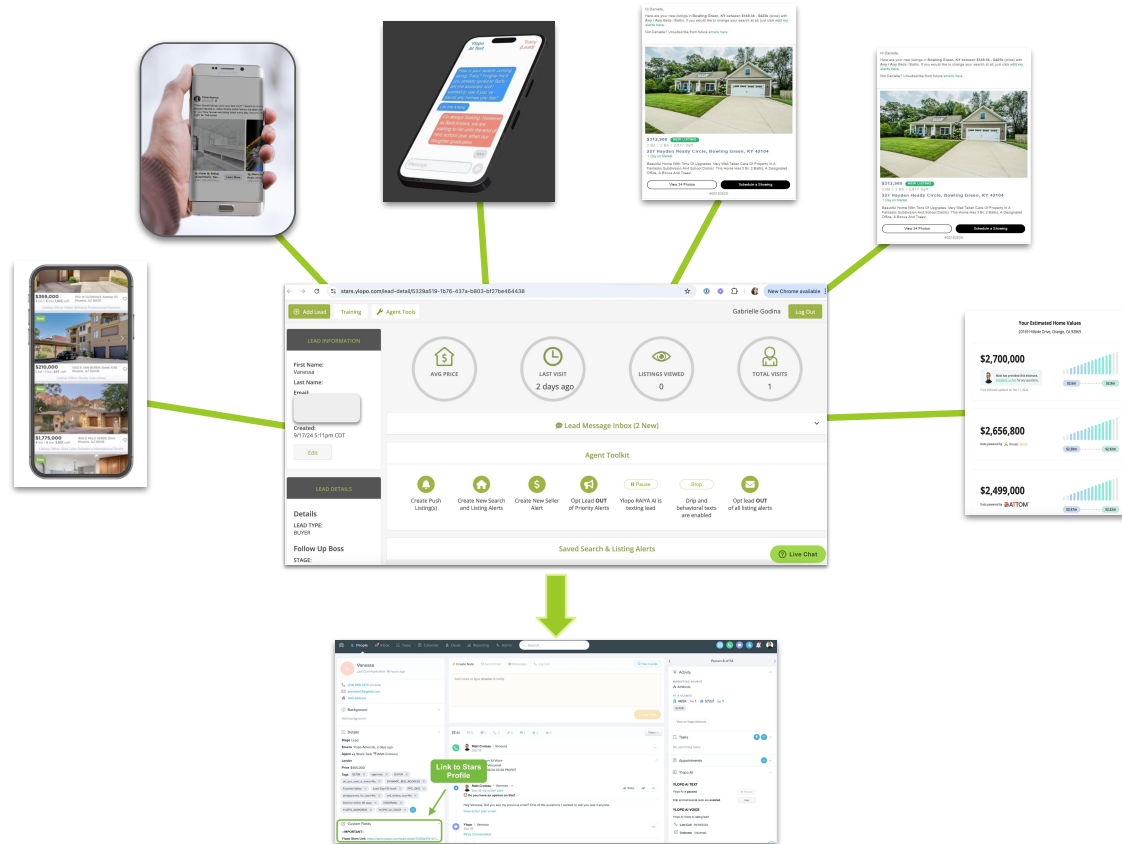
## **Q&A**

End

# Utilize Ylopo Stars for Lead Engagement and Nurturing



# CRM + Ylopo (Stars): Integration



Stars is Ylopo's database marketing tool that integrates with your CRM, giving you a powerful way to engage, nurture and track home buyer and seller activity from your new leads to past clients.

# Accessing Stars

The screenshot displays the Stars application interface. On the left, a sidebar shows a list of leads, with a green box highlighting a lead for Vanessa and a green arrow pointing to the 'Link to Stars Profile' button. The main content area shows the lead details for Vanessa, including her first and last names, a placeholder for a photo, and a 'Created' date of 9/17/24 5:11pm CDT. Below this, there's a 'LEAD DETAILS' section with 'LEAD TYPE: BUYER' and 'Follow Up Boss' information. To the right, there's a 'LEAD INFORMATION' section with four circular icons: 'AVG PRICE' (house with dollar sign), 'LAST VISIT' (clock, 2 days ago), 'LISTINGS VIEWED' (eye, 0), and 'TOTAL VISITS' (person, 1). Below these is a 'Lead Message Inbox (2 New)' section. Further down is an 'Agent Toolkit' section with various icons and buttons: 'Create Push Listing(s)', 'Create New Search and Listing Alerts', 'Create New Seller Alert', 'Opt Lead OUT of Priority Alerts', 'Ylopo RAIYA AI is texting lead' (with a 'Pause' button), 'Drip and behavioral texts are enabled' (with a 'Stop' button), and 'Opt lead OUT of all listing alerts'. At the bottom, there's a 'Saved Search & Listing Alerts' section and a 'Live Chat' button.

Stars is the control center for a user experience on your home search site. Agents must have a Stars login to access Stars and an Agent subdomain required to be listed on the "Presented by" section on the home search site.

# Logging into Stars

## Your Ylopo Stars Access Information



**Support** <support@ylopo.com>  
to me ▾



##- Please type your reply above this line -##



**Gabrielle Godina (Ylopo)**

Aug 17, 2023, 12:46PM PDT

Hi Gabrielle,

Here is your new Stars Username and Password:

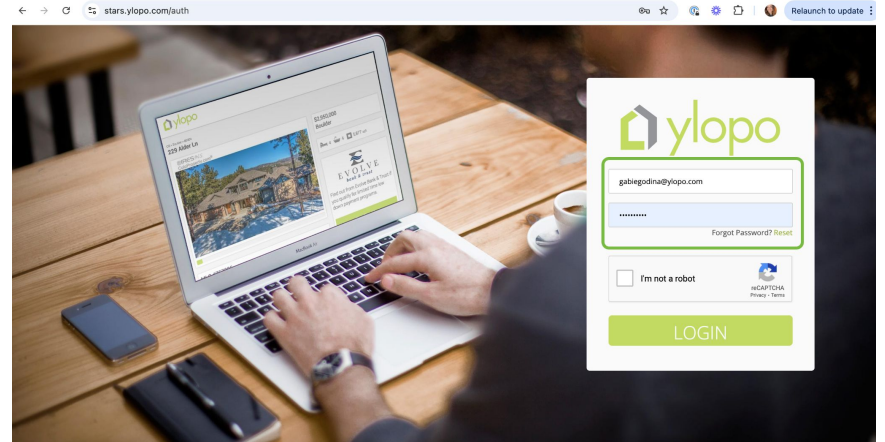
Username: [ggodina@ylopo.com](mailto:ggodina@ylopo.com)

Temporary Password: Ylopo\*12

Log in page: <https://stars.ylopo.com/>

Ylopo Stars must be accessed through an individual's lead file in your CRM system. You will be able to access Stars when you receive your first Ylopo lead.

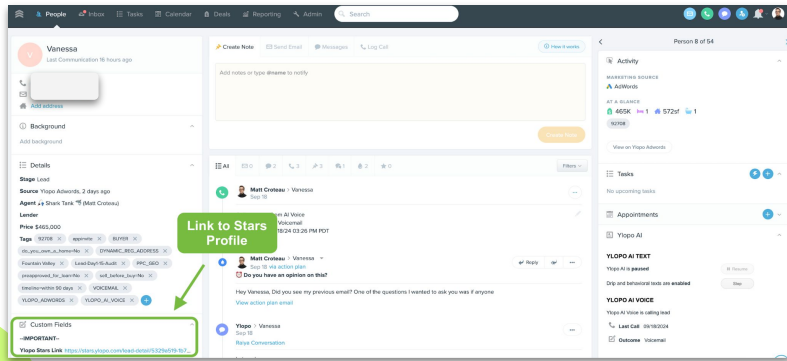
Your Stars login information will be sent to you from Ylopo via email



Access a lead profile in Stars to login or use the link provided. You will always access Stars from a leads Stars link in your CRM

# Stars: Manually Add a Lead to Stars

A contact must be in Stars to utilize Ylopo tools like AI texting, listing alerts and remarketing



[Learn More](#)

Add a lead via Add Lead button in Stars or visit <https://stars.ylopo.com/lead-detail/add>

The screenshot shows the 'Add Lead' form in Stars. The form includes fields for 'Enter first name', 'Enter last name', 'enter email', and 'enter phone number'. It also has a 'Send Welcome Email' checkbox and a 'Submit and Save' button. The form is titled 'New Lead Details' and includes a 'PASTE FUB PROFILE LINK/URL HERE' field at the top.

Watch Now

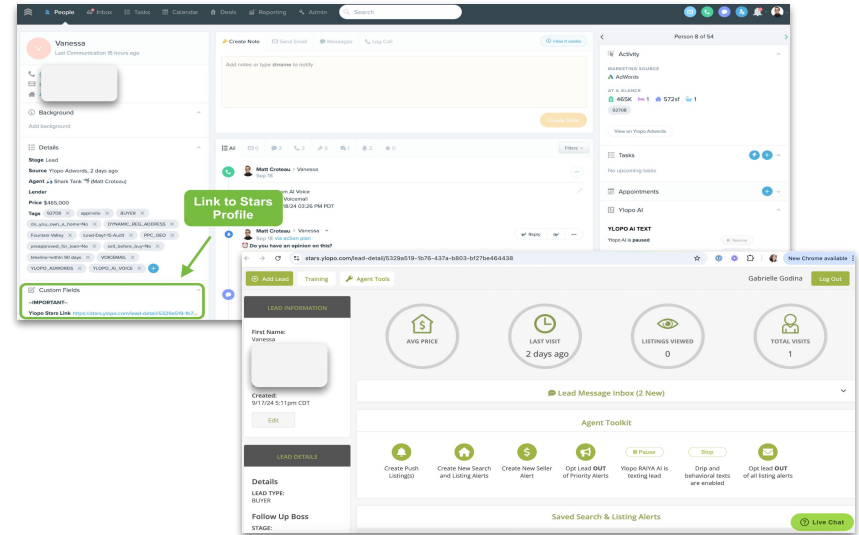
# Stars: Remarketing

Build brand awareness by retargeting leads in your database with similarly viewed properties



[Learn More](#)

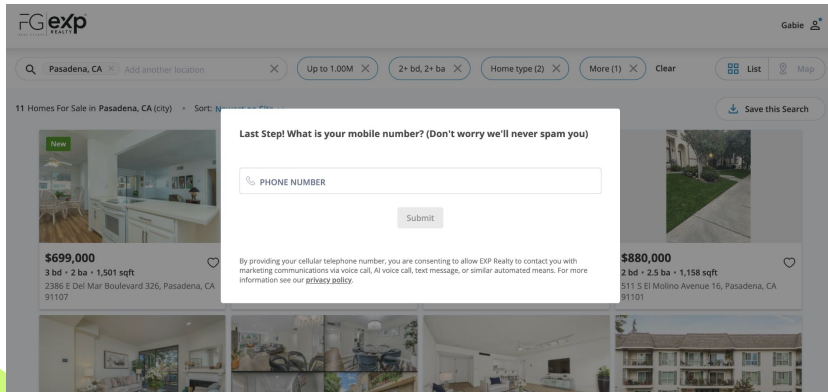
Leads with Stars Profiles/Links are eligible for remarketing.



Watch Now 

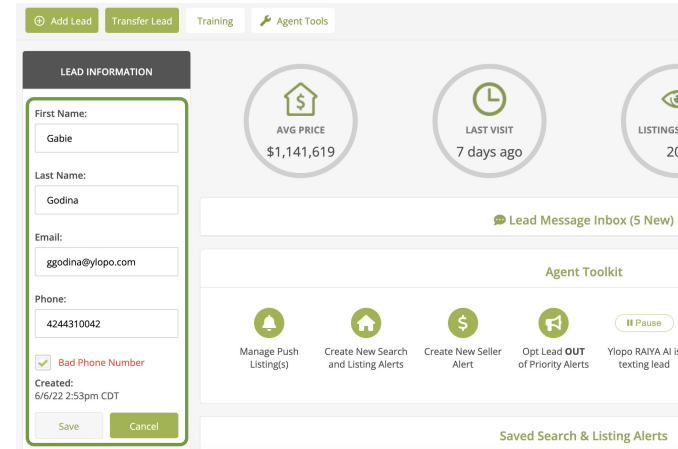
# Stars: Lead Information & Bad Number Tool

Manage lead contact info in Stars and utilize the bad number tool to get updated numbers



[Learn More](#)

Manage Lead Information in Stars



Watch Now



a search site activity is logged in

The collage features three primary digital assets:

- Laptop:** Displays a website titled "Pusat Sewa Rumah Sempadan" with a search bar and a "Cari" button.
- Smartphone:** Shows a mobile app interface with a "Home" button and a "Listings" section.
- Tablet:** Displays a real estate website with a large image of a property, a "View Details" button, and a "Contact Us" button.

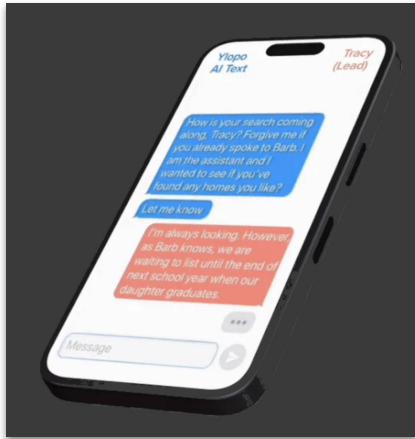
Green lines connect the assets, indicating a unified digital marketing strategy across multiple devices.

[illegible]

**Watch Now** 

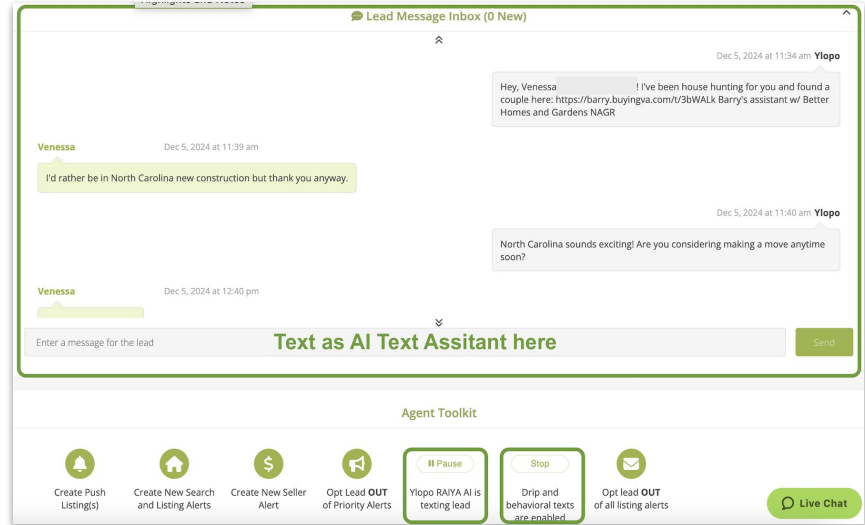
# Stars: AI Texting

Leverage your AI text assistant to engage and nurture leads



[Learn more](#)

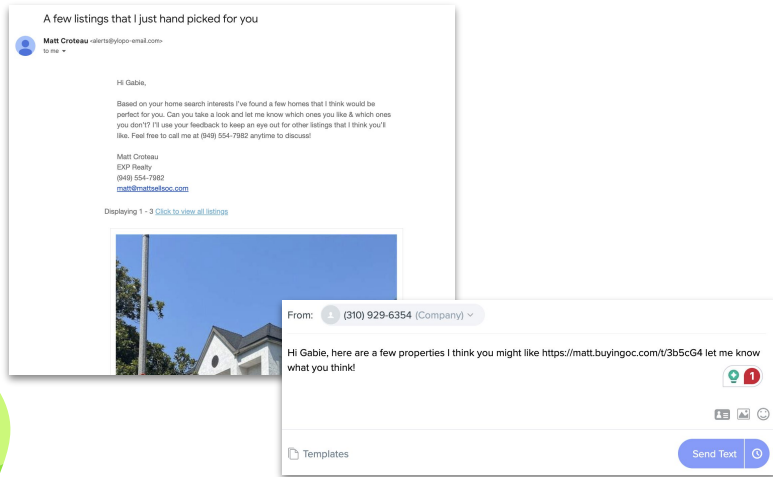
Manage your AI Text Assistant in Stars



Watch Now

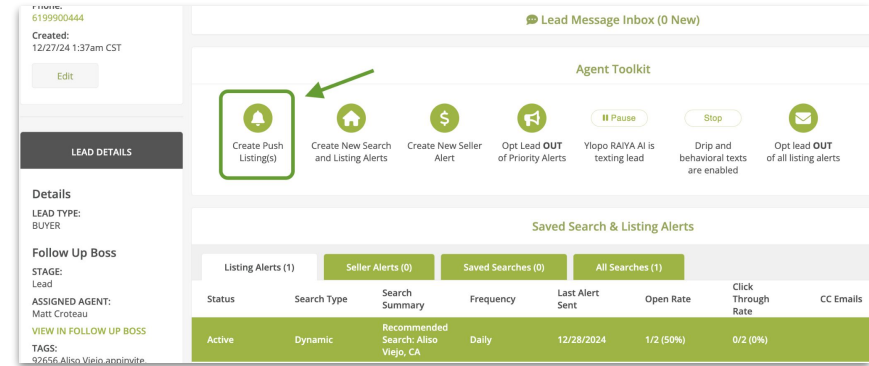
# Stars: Push Listings and Push Listing Link

Use Push listings to hand pick properties to send to your leads via email or with a textable link



[Learn More](#)

Create and manage Push Listings with the Push Listing Tool in Stars



Watch Now


# Stars: Listing Alerts and Listing Alert Link

Keep your leads engaged on your website with relevant property updates via listing alert and the listing alert link

Hi Danielle,

Here are your new listings in Bowling Green, KY between \$149.5k - \$425k (price) with Any / Any Beds / Baths. If you would like to change your search at all, just click [edit my alerts here](#).

Not Danielle? [Unsubscribe from future emails here](#)



**\$312,900** NEW LISTING

3 Bd | 2 Ba | 2,617 Sqft

**227 Hayden Heady Circle, Bowling Green, KY 42104**

1 Day on Market

Beautiful Home With Tons Of Upgrades. Very Well Taken Care Of Property In A Fantastic Subdivision And School District. This Home Has 3 Br, 2 Baths, A Designated Office, A Bonus And Trees!

[View 34 Photos](#) [Schedule a Showing](#)

#20103620

[Learn more](#)

Manage Listing Alerts in Stars

Agent Toolkit

- Create Push Listing(s)
- Create New Search and Listing Alerts
- Create New Seller Alert
- Opt Lead OUT of Priority Alerts
- Ylopo RAIYA AI is texting lead
- Pause
- Stop
- Drip and behavioral texts are enabled
- Opt lead OUT of all listing alerts

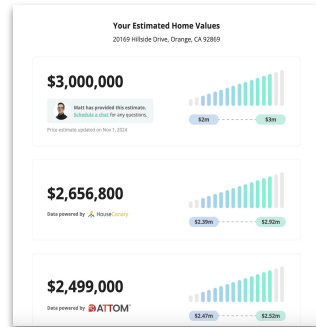
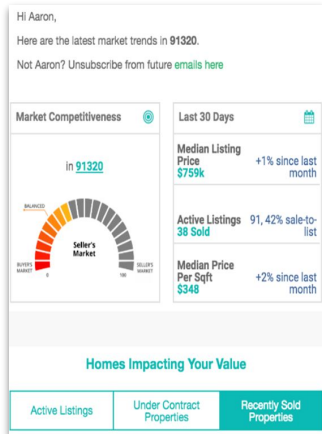
Saved Search & Listing Alerts

Listing Alerts (1)		Seller Alerts (0)		Saved Searches (0)		All Searches (2)	
Status	Search Type	Search Summary	Frequency	Last Alert Sent	Open Rate	Click Through Rate	CC Emails
Active	Dynamic	Recommended Search: Gloucester Point, VA \$674.3k-\$1.1m	Daily	12/09/2024	1/1 (100%)	0/1 (0%)	<a href="#">View</a> <a href="#">Edit</a>

Watch Now

# Stars: Seller Alert and Seller Report

Engage and nurture sellers in your database with local market updates (seller alert) and home equity reports (seller report)



Manage Seller Alerts/Seller Reports in Stars

**Agent Toolkit**

- Create Push Listing(s)
- Create New Search and Listing Alerts
- Create New Seller Alert
- Opt Lead OUT of Priority Alerts
- Ylopo RAIYA AI is texting lead
- Stop
- Drip and behavioral texts are enabled
- Opt lead OUT of all listing alerts

**Saved Search & Listing Alerts**

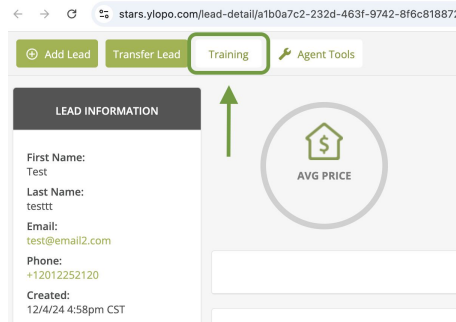
Listing Alerts (1)		Seller Alerts (2)		Saved Searches (0)		All Searches (3)		
Status	Search Type	Search Summary	Email Campaign	Frequency	Last Alert Sent	Open Rate	Click Through Rate	CC Emails
Active	Seller Alert	Seller Alert 21 Nov 2024 (23456): 2432 Sandfiddler Road, Virginia Beach, VA 23456	Ylopo AVM Report	Monthly	11/22/2024	1/1 (100%)	0/1 (0%)	<a href="#">Edit</a>

[Live Chat](#)

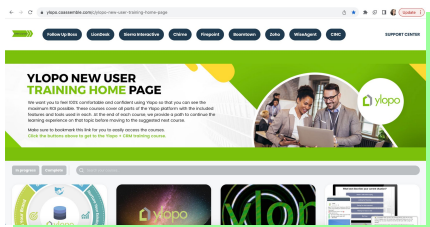
Watch Now 

Learn more about [seller alerts](#), [seller report \(US\)](#), [Seller Experience \(Canada\)](#), [Understanding the seller report \(CAN\)](#)

# Ylopo Training and Coaching Resources



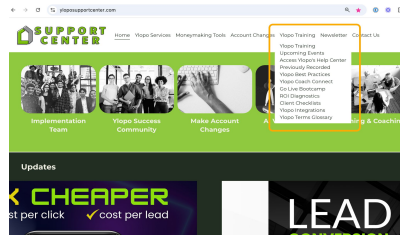
# Ylopo Training and Coaching Resources



Online Training Courses



Live Weekly Training



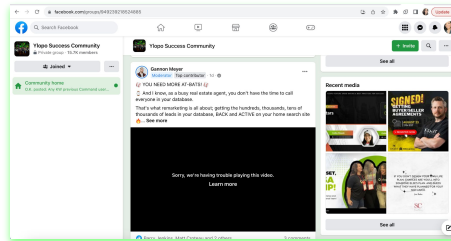
Ylopo Support Center



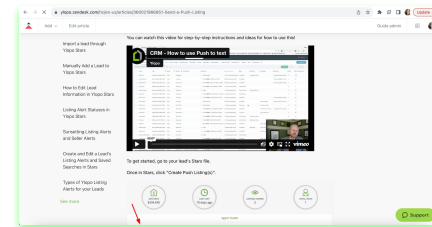
Realtor in Residence Office Hours



Ylopo Media Center



Ylopo Success Community



Ylopo Knowledgebase

# Ylopo Best Practices

← → ↺ yloposupportcenter.com/ylopo-best-practices



[Home](#) [Ylopo Services](#) [Moneymaking Tools](#) [Account Changes](#) [Ylopo Training](#) [Newsletter](#) [Contact Us](#)

CALL SUPPORT

## Ylopo Best Practices

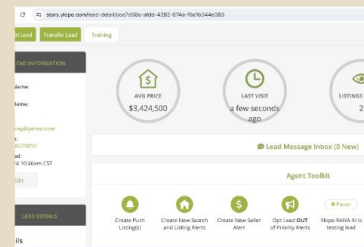
From working new leads to re-engaging old leads: Scroll down to learn more about Ylopo best practices!



Getting Started



Working New Leads



Stars

# Ylopo Prospecting Scripts

- Ylopo Scripts for Success by Barry Jenkins
- Best Practices for Seller Report Activities
- Best Practices for taking AI Voice Calls
- Direct Connect Outbound Script Suggestions
- Keys to continuing the conversation

# Advice From Seasoned and Successful Ylopo Clients

- ❑ Learn in steps
- ❑ Time block your calendars for working on your business
- ❑ Time block your calendars for working your database
- ❑ Be consistent
- ❑ Import Your leads for remarketing
- ❑ Attend Coaches Office Hours to understand your Ylopo tools and products
- ❑ Attend yearly Ylopo Summits
- ❑ Meet with Ylopo's Marketing team quarterly
- ❑ Take advantage of all the tools, people, and resources provided by Ylopo

**THANK  
YOU!**