

# Agent Quick Start Training



Every Tuesday, 10AM PST



# Agenda

- What is Ylopo and what Ylopo does for You!
- New Ylopo Agent Onboarding Guide
- CRM, Agent, and Ylopo Roles in online lead generation and database nurturing
- CRM + Ylopo Integration (FUB Integration example)
- Stars tools to engage and nurture
- Branded site tools to convert
- Ylopo Training and Coaching Resources

# What is Ylopo?

Ylopo's mission is to revolutionize the real estate industry by providing cutting-edge technology solutions that empower agents to grow, connect and engage their databases, and effectively grow their businesses.



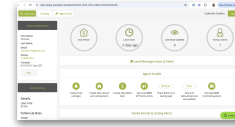
CRM  
Integration



Marketing &  
Lead Gen



AI Text & AI Voice



Stars - Nurture  
Tools



Branded  
Site -  
Conversion  
Tools



Home Search  
Site



Branded Site



Remarketing



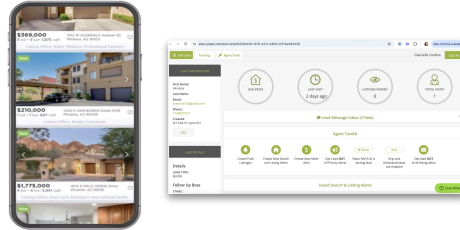
Priority  
Notifications

# What Ylopo does for you!

✓ Gets you more leads through Facebook and Google ads and retarget them with remarketing



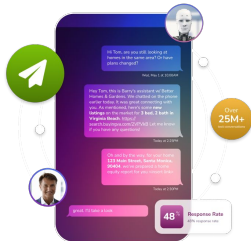
✓ Provides you with websites that track their activity and keep them engaged



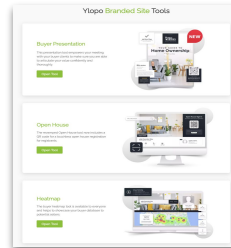
✓ Alerts you of important lead activity



✓ Improves your speed-to-lead and follow up strategy via AI Text and AI Voice



✓ Provides tools to help you make buying and selling conversations more productive and successful



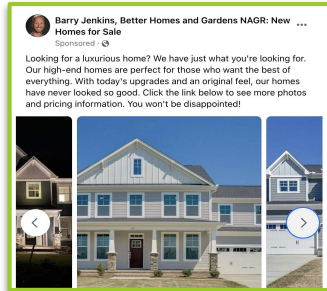
✓ Plugs right in to your CRM to keep you organized



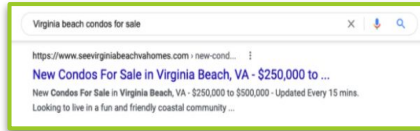


# What Ylopo does for our Clients

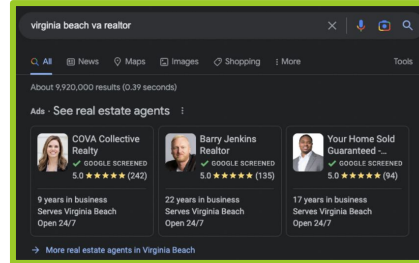
✓ Generate leads through Facebook and Google ads and retarget them with remarketing



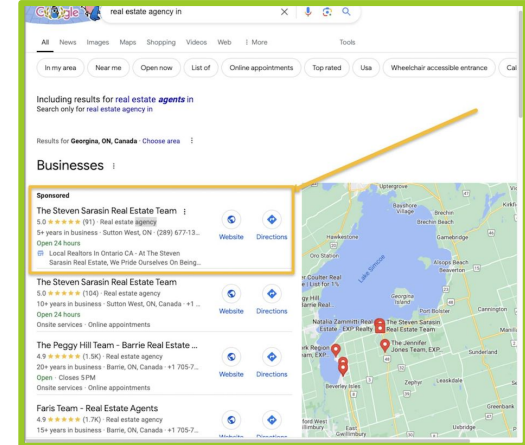
Social Ads (new and remarketing)



Google Pay Per Click



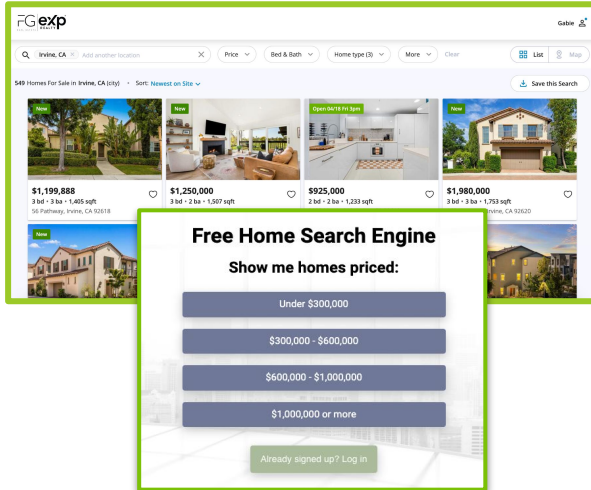
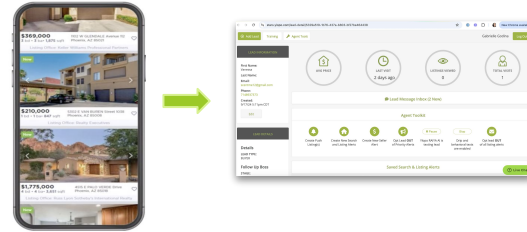
Google Local Service Ads



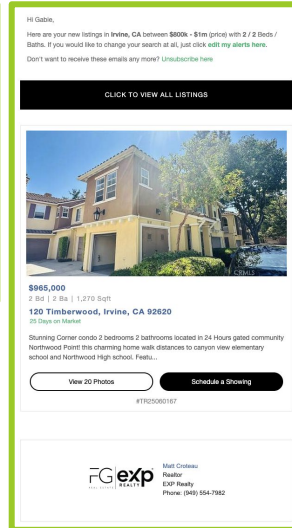
Google LSA, Google Business Profile Ads

# What Ylopo does for our Clients

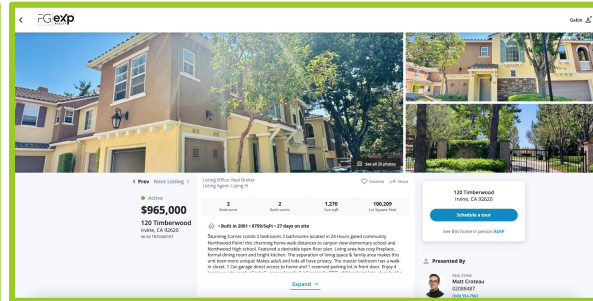
✓ Provide your database with a dedicated home search site that tracks users activity and keeps them engaged with your brand



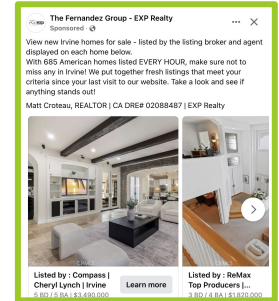
Profile on home search site created upon registration



Listing Alerts sent after registration



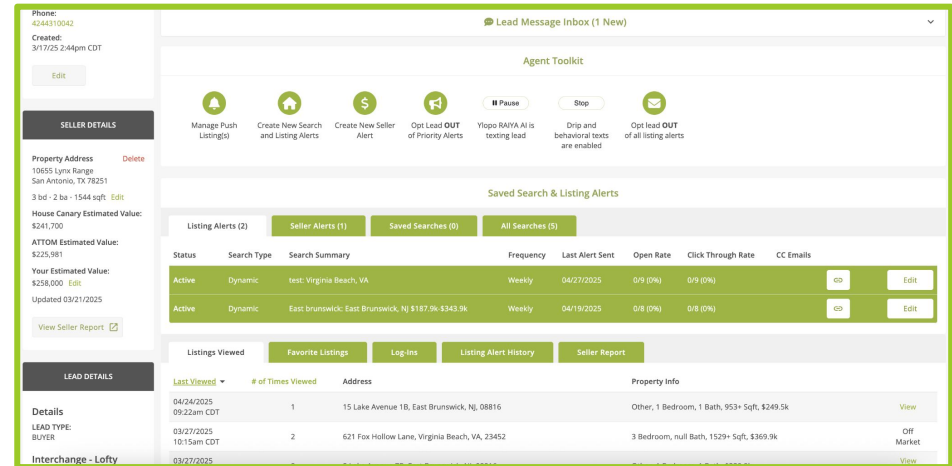
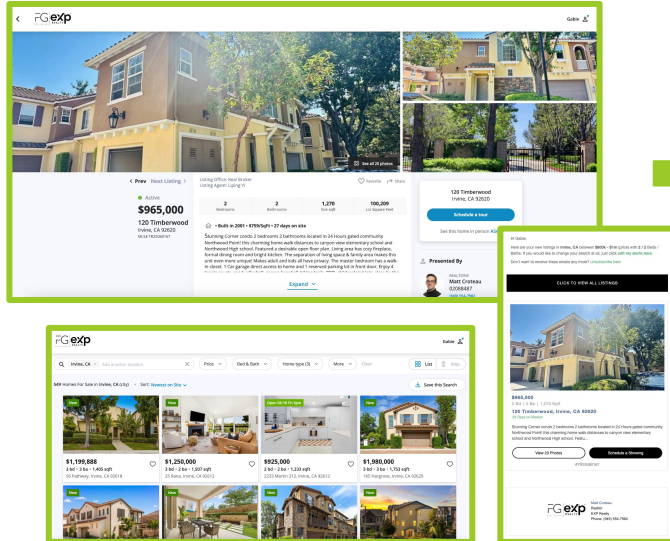
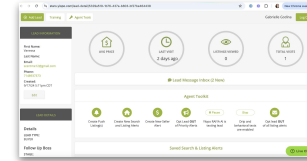
MLS IDX feed keeps listings up to date, Agent and team branding in front of buyers



Retargeting with remarketing

# What Ylopo does for our Clients

✔ Provide your database (new leads and existing) with a dedicated home search site that tracks users activity and keeps them engaged with your brand

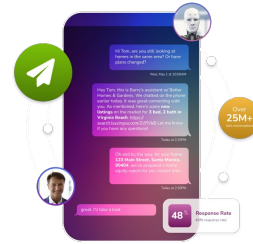


Opens, clicks, visits, time spent, properties viewed tracked as users engage with home search site

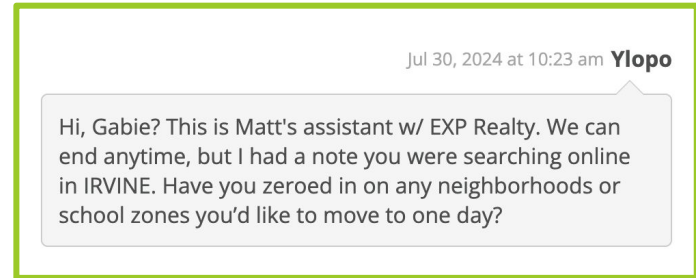
User Activity Tracked in Stars, Agent tool kit to manage listing alerts, seller alerts, AI texting, integrated into your CRM

# What Ylopo does for our Clients

✓ Improve speed-to-lead and follow up strategy via AI Text and AI Voice



AI Voice: Live lead transfers, 14 calls over 90 days to new Ylopo leads



AI Text Assistant: Engage new leads, revive old cold leads

# What Ylopo does for our Clients

✓ Alerts agents of important lead activity to help find opportunities from user engagement



(818) 918-9691

Your seller lead Theresa bell (901) 679-6804 has updated their home details in the ylopo seller report with a message: Inground Pool. View in CRM <https://app.followuboss.com/2/ser>

**Priority Text  
sent to agent**

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

notification@ylopo.com

To: me

PRIORITY LEAD ALERT: Theresa bell

Phone Number: (818) 679-6804

Your seller lead Theresa bell (818) 679-6804 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 CRM

• Mark this Priority Lead task as "done" by clicking [here](#).

• View lead in [FollowUpBoss](https://app.followuboss.com/2/ser) [here](#)

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**

Tags BUYER X

I\_NEED\_TO\_SELL\_BEFORE\_I\_CAN\_BUY X

Remarketing Visitor X

RETURNED X

sell\_before\_buy=Yes X

timeline=over 6 months X

Y\_SELLER\_NEW\_HOME\_UPGRADES X

Y\_SELLER\_REPORT\_ENGAGED X

Y\_SELLER\_REPORT\_VIEWED X

YLOPO\_FACEBOOK X

YPRIORITY X

**YPRIORITY tag  
added on lead profile**

Ylopo  
Priority

Ylopo PRIORITY LEAD ALERT: Theresa bell (901) 679-6804

Theresa bell (901) 679-6804 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.  
2 tags Y\_SELLER\_REPORT\_ENGAGED and Y\_SELLER\_NEW\_HOME\_UPGRADES have been added to the lead.

To view seller report, [click here](#).  
To mark this task as complete, [click here](#).  
To prevent this lead from triggering a Priority Lead status in the future, [click here](#).

Get some script ideas here: <http://bit.ly/Ylopo-Scripts>  
Contact us at [support@ylopo.com](mailto:support@ylopo.com) if you have any questions!

**Priority note in  
CRM**

Tasks (46)

High Priority Lead: This lead just shared 120 S Mentor Avenue 105, Pasadena, CA with someone else! Subty Engage

Them!

Jan 10th 2025

AJ Zarate

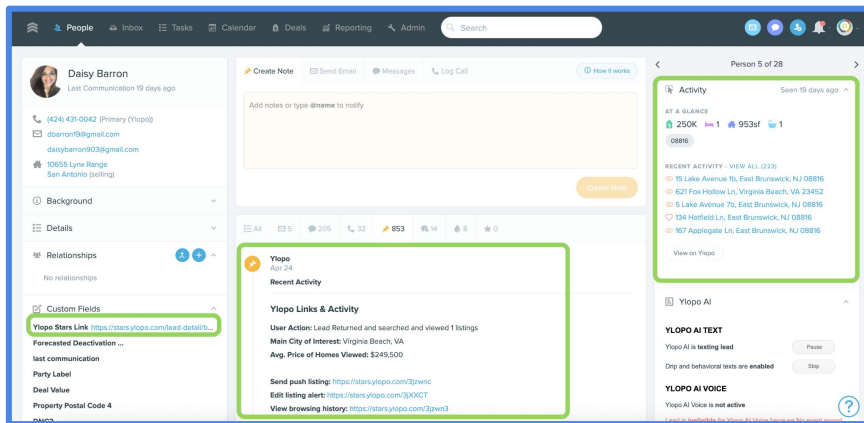
**(FUB, Sierra)  
Priority task  
created**

# What Ylopo does for our Clients

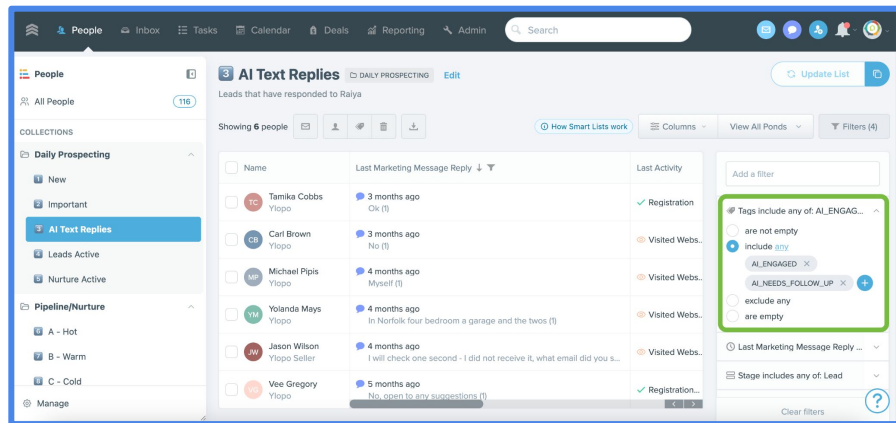
✓ Plugs in to clients CRMs to keep and improve clients workflows and automations



EX. Sync Ylopo activity and tools into CRM for easy access and visibility of important activity



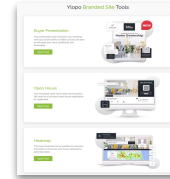
Ex. Find people in your database to call and connect with in CRM, like those responding to your AI assistant





# What Ylopo does for our Clients

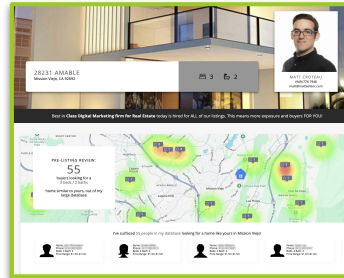
✓ Provides tools to help clients make buying and selling conversations more productive and successful



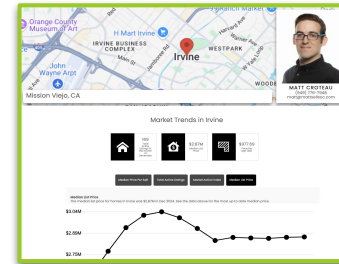
Buyer Presentation



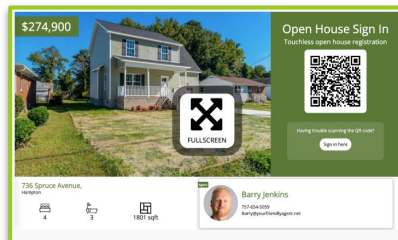
Heat Map



Branded Market Trends



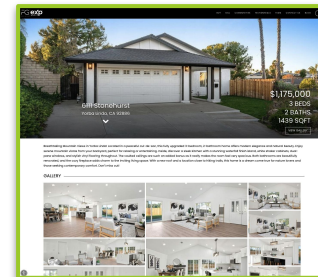
Open House Tool



Single Listing Flyer



Listing Detail Page



# Onboarding Guide - Getting Started



Step 1. Complete the Agent Profile Questionnaire ASAP

**Completing this form will:**

- Create a Ylopo Stars Account
- Set up an agent IDX site/agent subdomain
- Add you to the team Branded Website
- Enroll you into Online Ylopo Training

**Please allow 3-5 business days for your Stars account and websites to be created.** Websites should be live before you can utilize Ylopo Branded Site tools such as the Open House Tool.

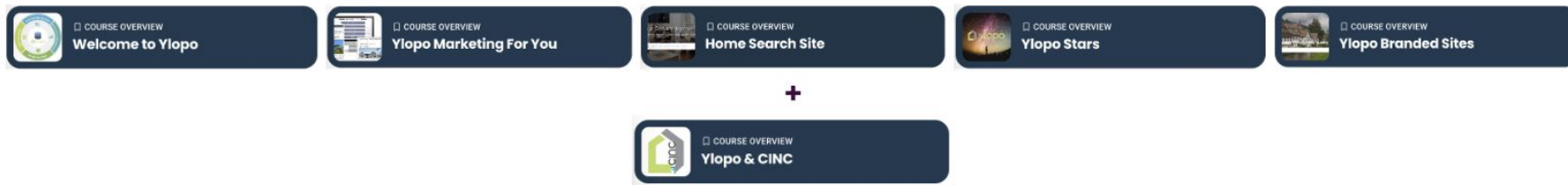


# Onboarding Guide - Getting Ready

## Step 2. Complete Online Ylopo Training

### Online Training:

- This online course catalog covers important parts of the Ylopo platform, their features, benefits and recommended practices.
- Also included are supplementary courses on the integration between Ylopo and your CRM.



# Onboarding Guide - Convert Leads

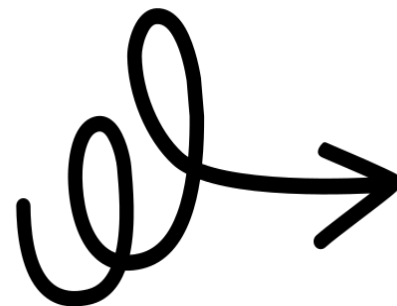


## Step 3. Attend Coaches Office Hours Sessions

- ★ **"Mastery Monday"**: Master your Smart Lists, Stages, Automations, Follow Up, and Scripting
- ★ **"Tools Tuesday"**: Get plugged in and leverage Ylopo's powerful tools, such as Heat Map, DyVA, Listing Rockets and Listing Presentations
- ★ **"Realtors-in-Residence Office Hours"**: Featuring our Realtors in Residence Barry Jenkins, Gabe Cordova and Livia Montforte, get the run down on the Ylopo system and tools!
- ★ **"All About Imports Thursday"** - Mass lead import and seller import
- ★ **"FUB Friday"**: A deep dive on Follow Up Boss



**Ylopo's role**  
in your  
business and  
**Integration**  
with your  
**CRM**



# CRM, Agent, and Ylopo Roles in Online Lead Generation

## 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

## Ylopo

Supercharge Your Business  
with Smart Lead Nurturing  
and Conversion Tools



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

## Agent

Manages the relationship to  
turn prospects into Clients



- Prospects
- Qualifies
- Advises
- Drives Conversion
- Builds & Nurtures Relationships
- Works leads in CRM
- Utilize tools to engage and nurture relationships



# CRM + Ylopo Integration: **Follow Up Boss** Example



Think of Ylopo as the fuel that drives leads and engagement into your business, while your CRM is the engine that keeps everything running smoothly.

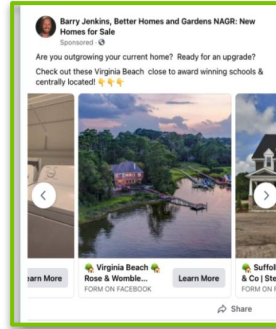
**Complete your online training to learn about your specific CRM's integration with Ylopo.**

# CRM + Ylopo Integration: New Buyer Lead

Buyer Lead

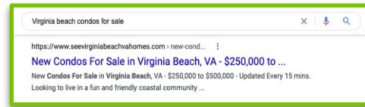


Facebook Social Ads

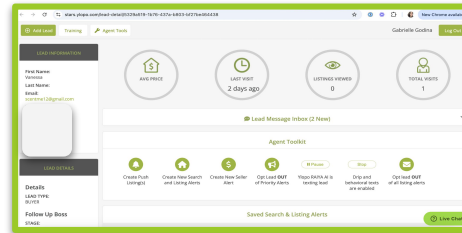
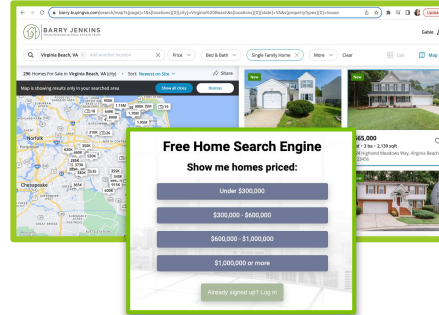


or

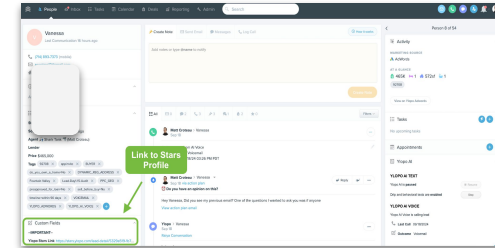
Google PPC Ads



Lead Home Search Site  
Registration & Profile creation



Lead delivered to CRM to  
begin outreach



Stars Profile is synced to  
CRM profile, access Stars link  
to access their Stars Profile

- Stars Profile created
- Saved search created
- Listing alert sent
- Ylopo AI engagement begins
- Captured for remarketing
- Captures user website activity

# CRM + Ylopo Integration: Stars Links

The image displays two overlapping web interfaces. The background interface is a CRM system showing a lead profile for 'Vanessa'. A green callout box with the text 'Link to Stars Profile' and a green arrow points to a 'Ylopo Stars Link' in the 'Custom Fields' section of the CRM. The foreground interface is the Stars application, showing a detailed lead profile for 'Vanessa'. The Stars interface includes a 'LEAD INFORMATION' section with fields for First Name, Last Name, Email, and Created date. It also features a 'LEAD DETAILS' section with fields for Lead Type and Follow Up Boss. The top of the Stars interface shows a navigation bar with 'Add Lead', 'Training', and 'Agent Tools' buttons. The right side of the Stars interface shows a user profile for 'Gabrielle Godina' and a 'Log Out' button. The main content area of the Stars interface includes a 'Lead Message Inbox (2 New)' section and an 'Agent Toolkit' section with various tools like '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', and 'Opt lead OUT of all listing alerts'. The bottom of the Stars interface shows a 'Saved Search & Listing Alerts' section and a 'Live Chat' button.

- Stars is Ylopo's database marketing tool that plugs into your CRM, this allows for activity synching and to give you additional tools to engage with your leads.
- Ylopo generated leads and leads who register on your Ylopo websites are automatically added to Stars.
- Ylopo license holders determine which lead sources to automatically add to Stars
- Work with your License holder to bring your existing database into Stars
- You can manually add a leads to Stars

# CRM + Ylopo Integration: **Stage**

The screenshot displays a CRM interface for a contact named Vanessa. A green box labeled "Stage" with an arrow points to the "Stage Lead" field in the "Details" section of the contact card. The contact card also shows the source as "Ylopo Adwords", the agent as "Shark Tank", and the lender as "Price \$465,000". The message history shows a conversation between Matt Croteau and Vanessa, with a message from Ylopo stating "Ylopo AI Voice is calling lead". The right sidebar shows the "Activity" panel with "MARKETING SOURCE" as "AdWords" and "AT A GLANCE" statistics. The "Tasks" panel shows "No upcoming tasks". The "Ylopo AI" panel shows "YLOPO AI TEXT" as "Ylopo AI is paused" and "YLOPO AI VOICE" as "Ylopo AI Voice is calling lead".

- Your Ylopo AI Text Assistant engages only with stages like Lead and Cold
- Ylopo AI Voice calls leads in the Lead Stage
- **Check with your license holder on which stages your AI can work**

# CRM + Ylopo Integration: **Stage Examples**

## AI Text

### ✓ Recommended AI Text Stages:

- Lead
- Attempted Contact

If you have a large database of nurture and cold leads you need help engaging, also utilize:

- Nurture
- Cold

## AI Voice

### ✓ Recommended AI Voice Stages:

- Lead
- Attempted Contact

- Your Ylopo AI Text Assistant engages only with stages like Lead and Cold
- Ylopo AI Voice calls leads in the Lead Stage
- **Check with your license holder on which stages your AI can work**

# CRM + Ylopo Integration: **Assigned Agent**

The screenshot displays a CRM interface with a top navigation bar including links 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 the lead profile for Vanessa, with a 'Details' section containing a 'Source' field (Ylopo Adwords, 2 months ago) and an 'Agent Me' field (highlighted with a green box and a green arrow pointing to it with a green label 'Assigned Agent'). The middle column shows a 'Create Note' form and a list of messages, including one from Matt Croteau to Vanessa dated Nov 2. The right column shows an 'Activity' section with a 'MARKETING SOURCE' (AdWords) and 'AT A GLANCE' statistics (459K, 1, 572sf, 1, 92708), a 'Tasks' section (No upcoming tasks), an 'Appointments' section (No upcoming appointments), and a 'Ylopo AI' section (YLOPO AI TEXT).

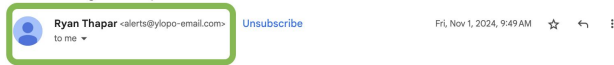
The assigned agent is used to send listing alerts and seller alerts from Ylopo to lead, the home search site presented by, and Priority notification alerts from Ylopo to agent.



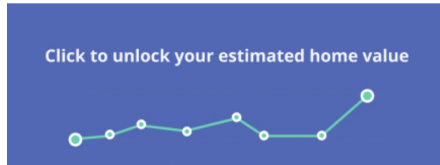
# CRM + Ylopo Integration: Assigned Agent Examples

## Listing Alerts/Seller Alerts

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



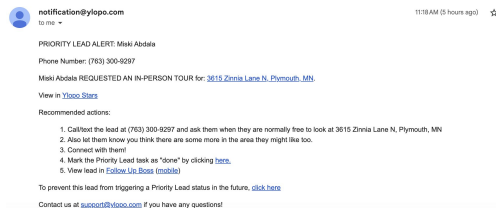
Hi Gabie,  
Here are the latest market trends in M8Y 4G9.  
Don't want to receive these emails any more? [Unsubscribe here](#)



## Important 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](#)

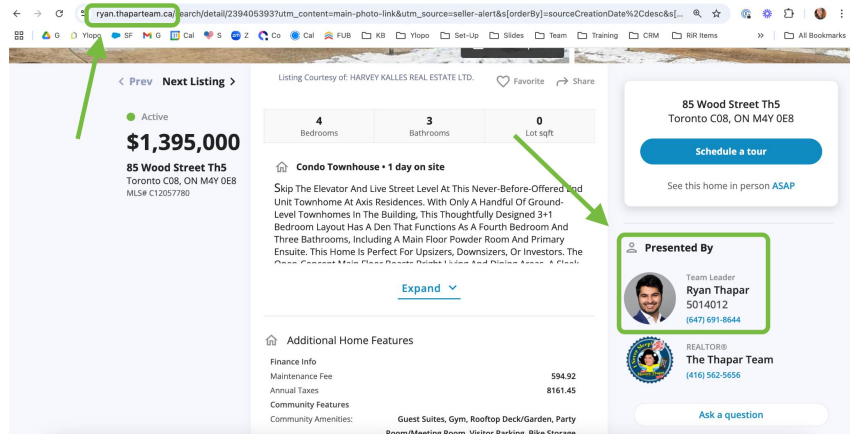


## (Optional) AI Text Assistant

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



# CRM + Ylopo Integration: Activity

The screenshot displays a CRM interface with a lead profile for Vanessa. The top navigation bar includes tabs for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin, along with a search bar and communication icons. The lead profile on the left shows contact information and details. The central area features a 'Create Note' section with a green box labeled 'Lead Activity' and a 'Create Note' button. Below this is a list of activities, with one highlighted in a green box: 'Registration from Ylopo page' with details like address, price, and agent. The right sidebar shows 'Activity' from Ylopo, 'Tasks', 'Appointments', and 'Ylopo AI' settings.

**Lead Activity**

**Registration from Ylopo page**  
...k3gSv9BKbLgOOEDxy7ZliYXL3NY78v46RjxprBy51EqAahoCOR  
QQAvD\_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**  
MARKETING SOURCE  
AdWords  
AT A GLANCE  
465K 1 572sf 1  
92708  
View on Ylopo Adwords

**Tasks**  
No upcoming tasks

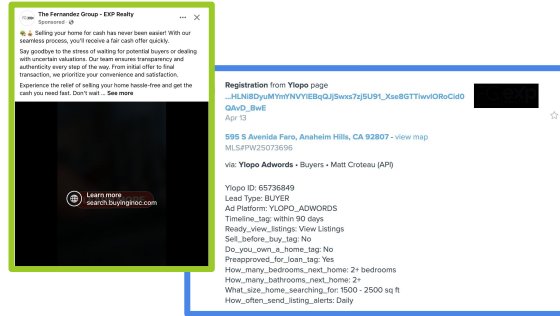
**Appointments**

**Ylopo AI**  
YLOPO AI TEXT  
Ylopo AI is paused  
Drip and behavioral texts are enabled

Activity from Ylopo Stars is added to your leads profile including engagement with ads, AI, home search site, listing alerts and seller reports.

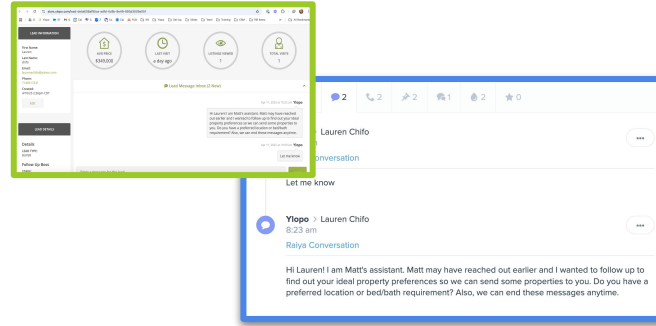
# CRM + Ylopo Integration: Activity Examples

## Ad Engagement



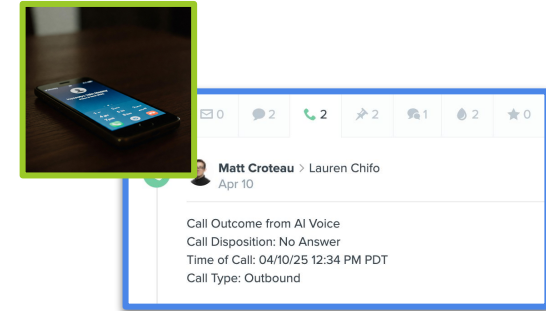
**The Fernandez Group - EXP Realty**  
Registration from Ylopo page  
GMLD\_BwE  
595 S Avenida Faro, Anaheim Hills, CA 92807 - view map  
MLS#PW25073696  
via: **Ylopo Adwords** • Buyers • Matt Croteau (AP)  
Ylopo ID: 65736949  
Lead Type: BUYER  
Ad Platform: YLOPO\_ADWORDS  
Timeline\_tag within 90 days  
Ready\_view\_listings: View Listings  
Set\_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 send\_listing\_alerts: Daily

## AI Text



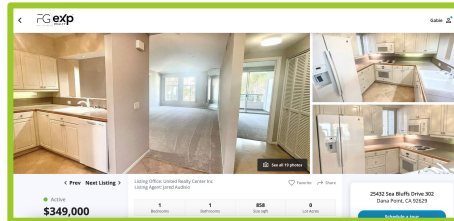
Lauren Chifo  
Conversation  
Let me know  
Ylopo > Lauren Chifo  
8:23 am  
Rays Conversation  
Hi Lauren! I am Matt's assistant. Matt may have reached out earlier and I wanted to follow up to find out your ideal property preferences so we can send some properties to you. Do you have a preferred location or bed/bath requirement? Also, we can end these messages anytime.

## AI Voice



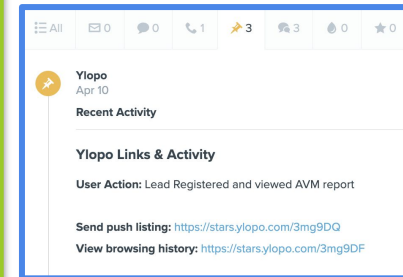
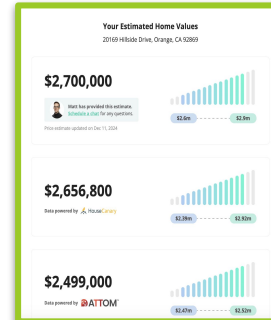
Matt Croteau > Lauren Chifo  
Apr 10  
Call Outcome from AI Voice  
Call Disposition: No Answer  
Time of Call: 04/10/25 12:34 PM PDT  
Call Type: Outbound

## 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>

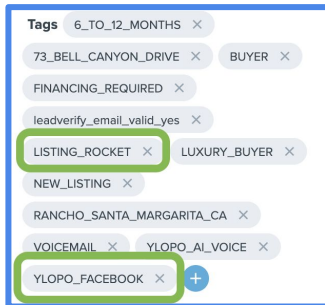
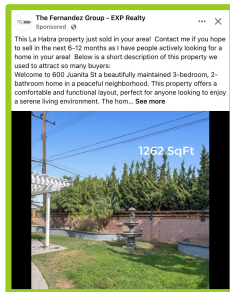
# CRM + Ylopo Integration: Tags

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 left sidebar shows the lead's details, including their stage (Lead), source (Ylopo Adwords), agent (Matt Croteau), and price (\$465,000). A green box highlights the 'Tags' section, which lists various tags such as '92708', 'appinvtte', '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 an action plan and a call outcome from AI Voice. The right sidebar shows the 'Activity' section with a marketing source (AdWords) and a 'Tasks' section with no upcoming tasks. The 'Ylopo AI' section shows that Ylopo AI is paused and that drip and behavioral texts are enabled.

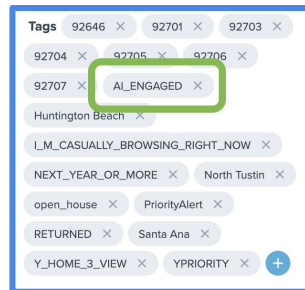
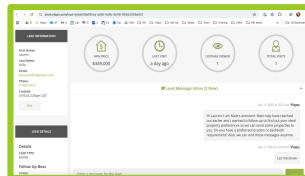
Tags will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database.

# CRM + Ylopo Integration: Ylopo Tags Examples

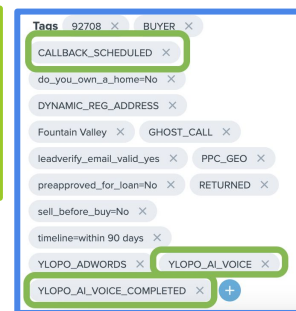
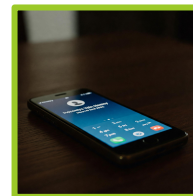
## Ad Engagement



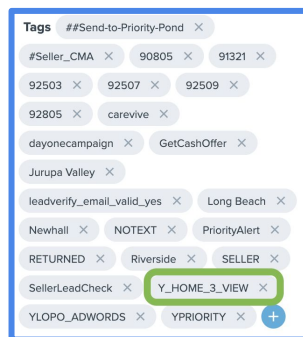
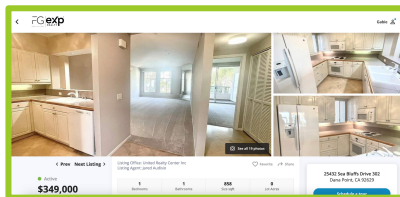
## AI Text



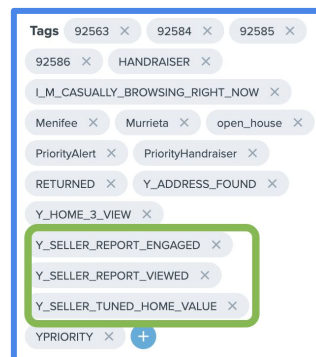
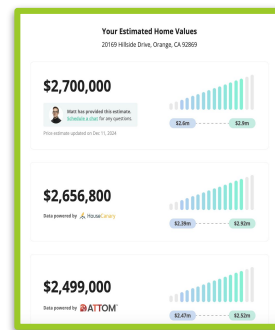
## AI Voice



## Home Search Site Activity



## Seller Report & Listing Alerts



# Ylopo Notifications: Priority Notifications

When someone's home search activity really heats up, or they reach out to you for help or more information, we will flag them as a "Priority Lead." These serve as a nudge to follow up and connect with them!

## Priority Text sent to agent

(818) 918-9991

Your seller lead Theresa has updated their home details in the ylopo seller report with a message: Inground Pool. View in CRM <https://app.followusboss.com/2/people/view/18258>

## Priority Email sent to agent

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

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

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: Stars](#)

- Mark the Priority Lead task as "done" by clicking [here](#).
- View lead in [Follow Us 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!

## YPRIORITY tag added on lead profile

Tags BUYER X

I\_NEED\_TO\_SELL\_BEFORE\_I\_CAN\_BUY X

Remarkinging Visitor X RETURNED X

sell\_before\_buy=Yes X

timeline=over 6 months X

Y\_SELLER\_NEW\_HOME\_UPGRADES X

Y\_SELLER\_REPORT\_ENGAGED X

Y\_SELLER\_REPORT\_VIEWED X

YLOPO\_FACEBOOK X YPRIORITY X +

## Priority notes added to lead profile in CRM

All 0 0 0 5 1 0 0 0 Filters

Ylopo 8:36 am

Priority

Ylopo PRIORITY LEAD ALERT: Theresa bell [REDACTED]

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.

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

To view seller report, [click here](#).

To mark this task as complete, [click here](#).

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

Get some script ideas here: <http://bit.ly/Ylopo-Scripts>

Contact us at [support@ylopo.com](mailto: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/t/8N7aY>

## Email notification sent to agent

Ylopo Behavioral Text First Response from Brenda Wheaton

notifications@ylopo.com  
10:50

We sent Brenda Wheaton "Hi, Brenda? This is local home team's assistant at Ylopo. If you prefer I do not text you just reply stop, but I had a note you were searching for in your search area. Have you opened an any neighborhoods or about areas and I like to move to the city?" on 5/20/24.

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."

View in [Email Client](#)

View in [Email Client](#)

To get the best out of future texts, [click here](#)

To get a text back on a behavioral reply, [click here](#)

## AI Text Tag added to CRM profile

Tags **AI\_ENGAGED** X BUYER X

cash\_offer=no X

do\_you\_own\_a\_home=Yes X

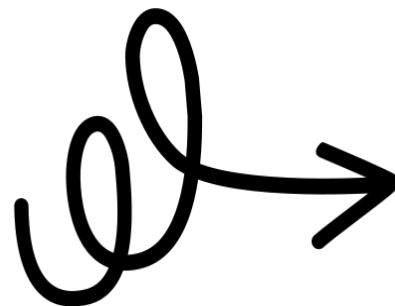
I\_NEED\_TO\_SELL\_BEFORE\_I\_CAN\_BUY X

## Conversation added to lead profile in CRM

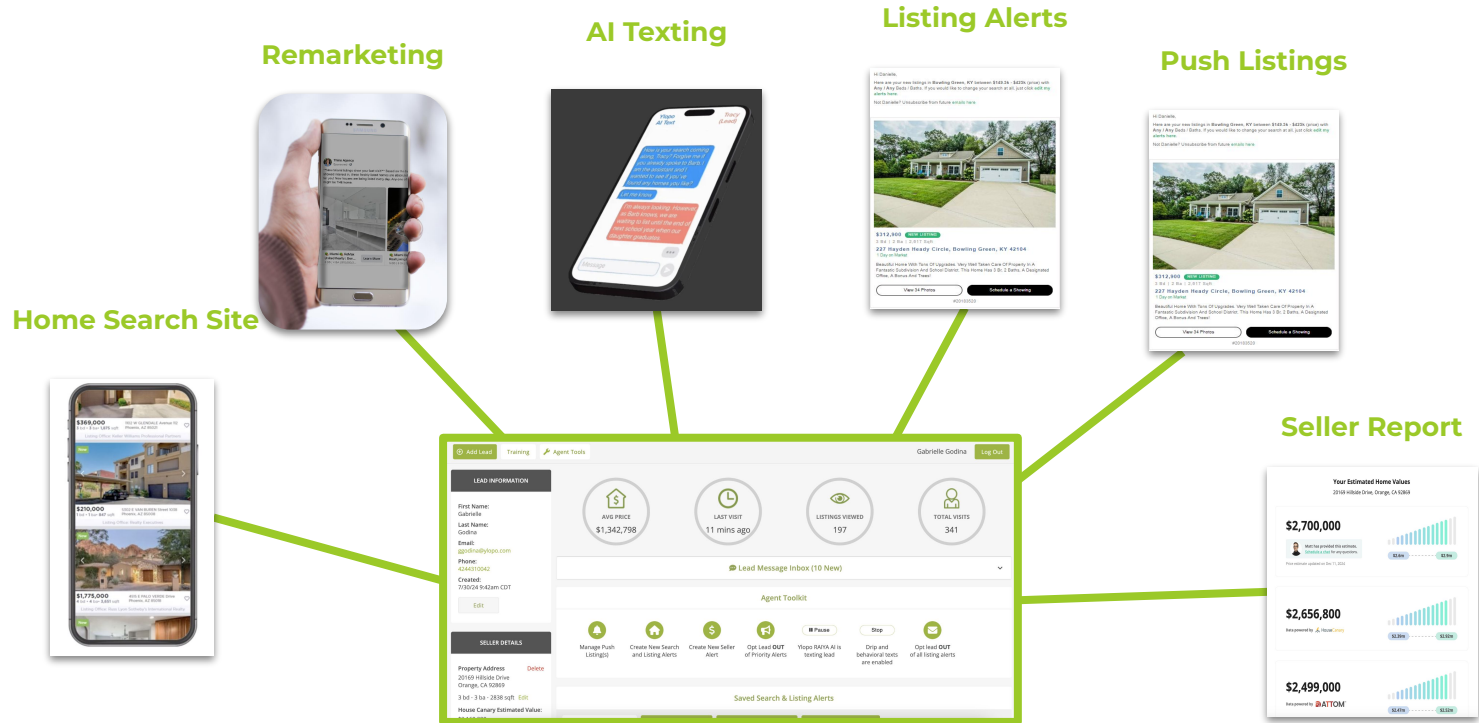
Brenda Wheaton > Ylopo

Raiya Conversation

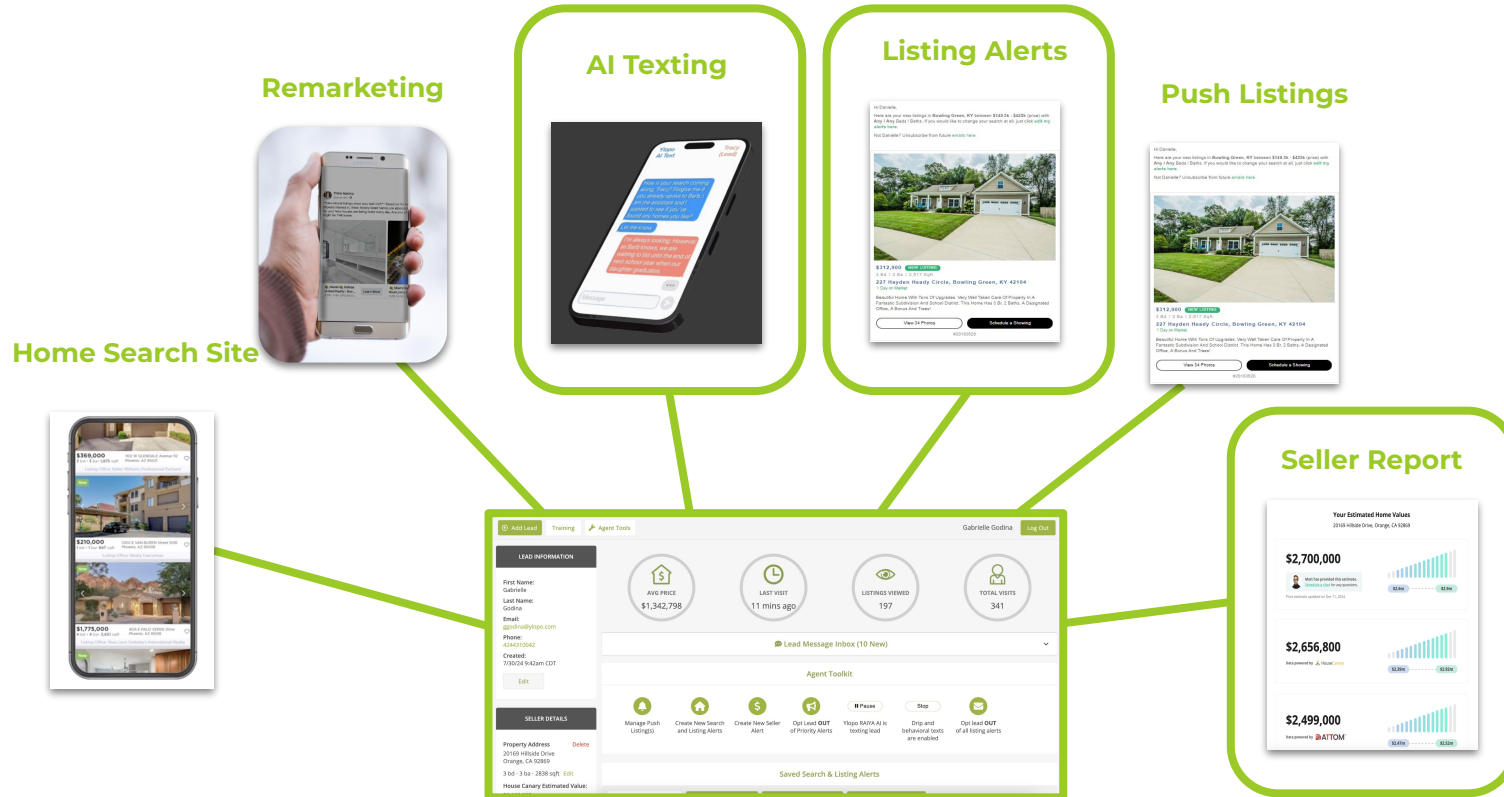
Hope to really get into searching in about 4 months are so if all works out ...don't want to waste your time...until I know what I can and can't do. I will get in touch. - Am looking at Boones Mill , Roanoke south side not in town, also Rocky Mount .. with 10 to 20 acres and a nice home.. but will get into that more when I know I can really search .



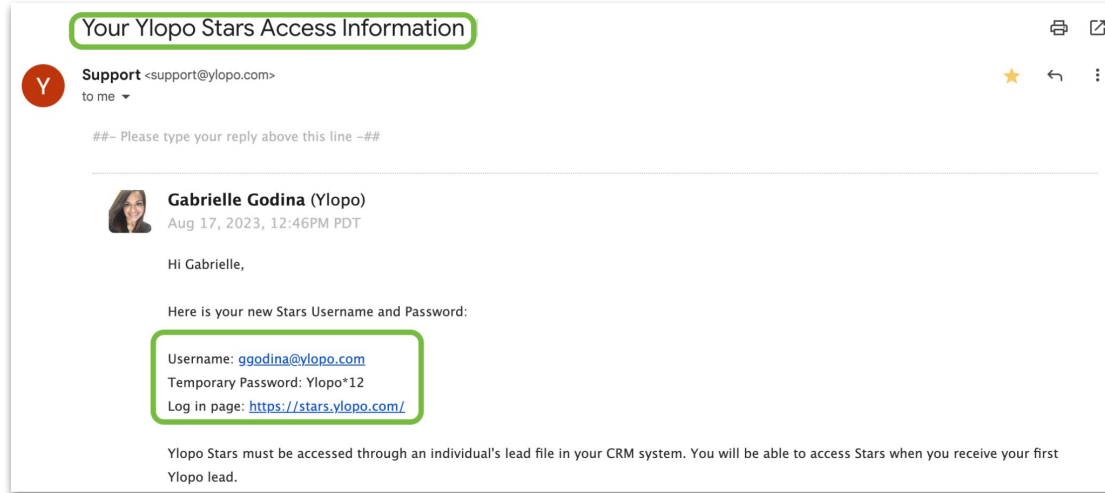
# Utilize Ylopo Stars for Lead Engagement and Nurturing



# Utilize Ylopo Stars for Lead Engagement and Nurturing



# Logging into Stars



Your Stars login information along with your (optional) agent subdomain URL will be sent to you from Ylopo via **support@ylopo.com** and a link to log into Stars for the first time. You will ALWAYS access Stars from a lead profile in your CRM.

This email is typically sent to you 3-5 business days after submitting your Agent Profile Questionnaire.

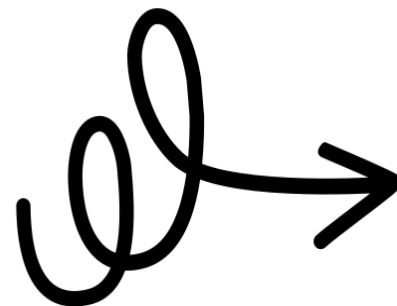
# Accessing Stars

The screenshot displays the Ylopo CRM interface. On the left, a lead profile for 'Vanessa' is shown. A green box highlights the 'Custom Fields' section, which contains a link to the Stars profile: 'Ylopo Stars Link: https://stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438'. A green arrow points from this link to the main Stars interface on the right.

The main Stars interface shows the following information:

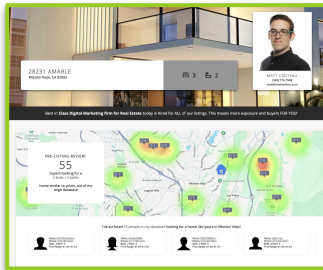
- LEAD INFORMATION:** First Name: Vanessa, Last Name: [Redacted], Created: 9/17/24 5:11pm CDT, Edit button.
- LEAD DETAILS:** Details, LEAD TYPE: BUYER, Follow Up Boss, STAGE: [Redacted].
- Key Metrics:** AVG PRICE, LAST VISIT (2 days ago), LISTINGS VIEWED (0), TOTAL VISITS (1).
- Lead Message Inbox:** (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 (Pause/Stop buttons), Drip and behavioral texts are enabled, Opt lead OUT of all listing alerts.
- Saved Search & Listing Alerts:** [Redacted].
- Live Chat:** [Redacted].

You will always access Stars from a lead profile in the CRM. If they don't have a link, they are not in Stars.

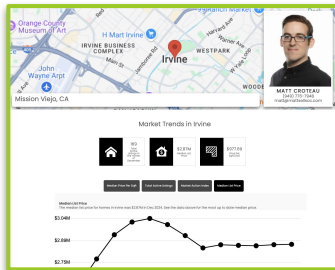


# Utilize Branded Site Tools for Conversion

Heat Map



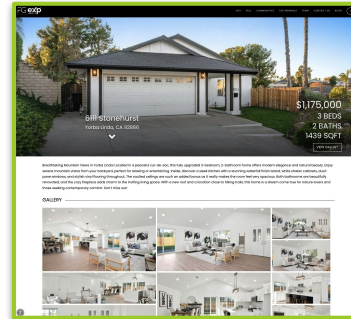
Branded Market Trends



Buyer Presentation



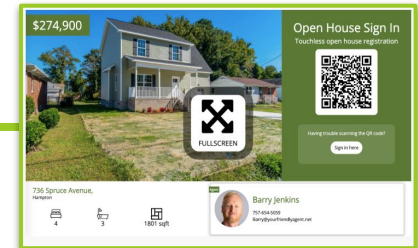
Listing Detail Page



Single Listing Flyer



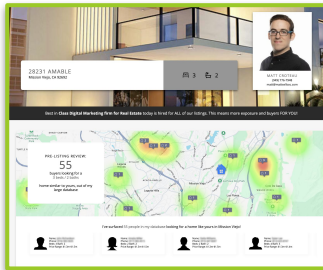
Open House Tool





# Utilize Branded Site Tools for Conversion

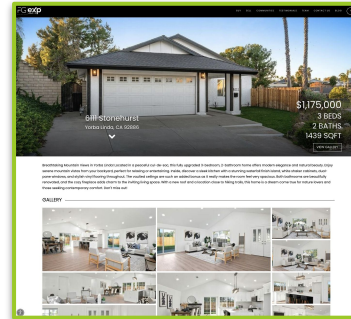
## Heat Map



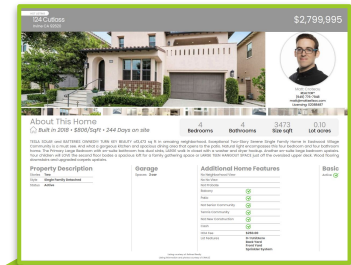
## Buyer Presentation



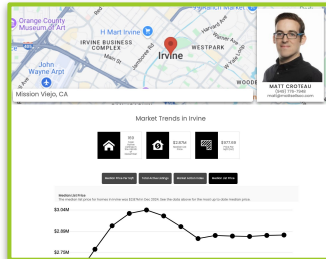
## Listing Detail Page



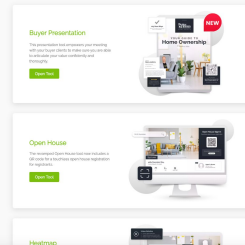
## Single Listing Flyer



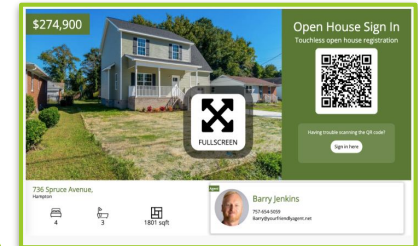
## Branded Market Trends



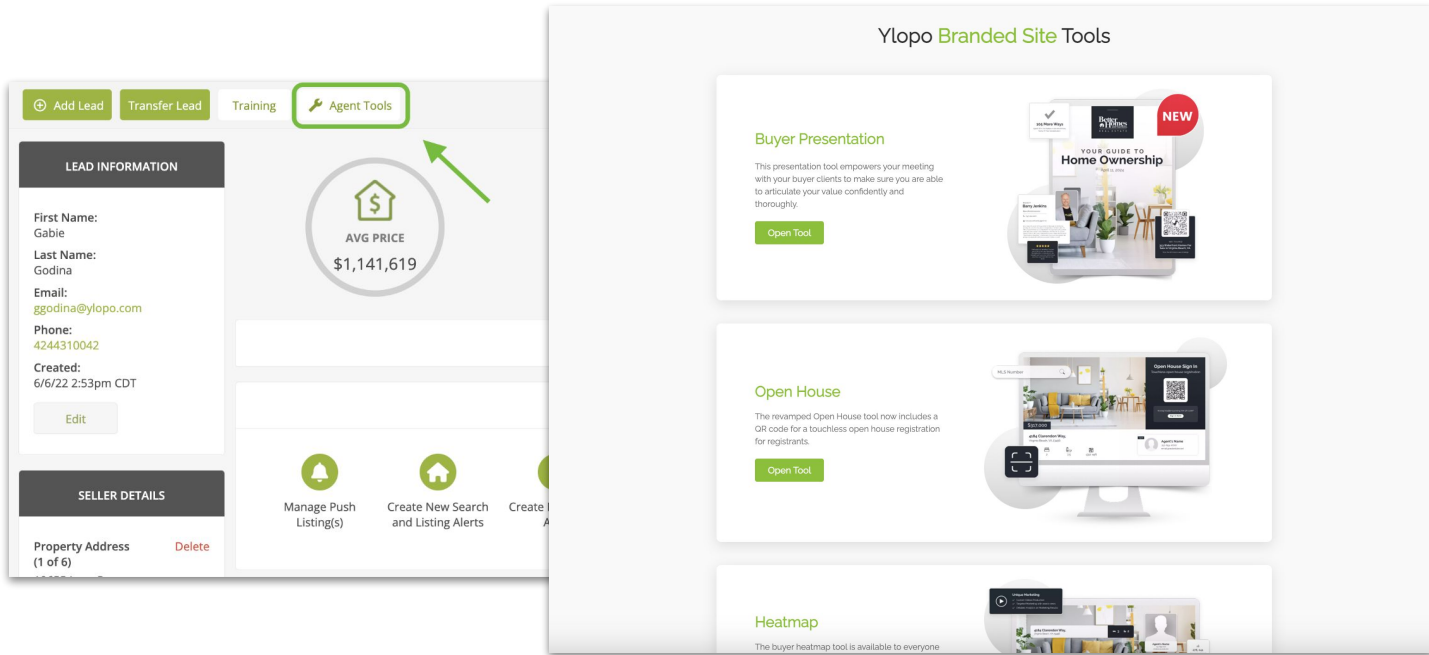
## Yippo Branded Site Tools



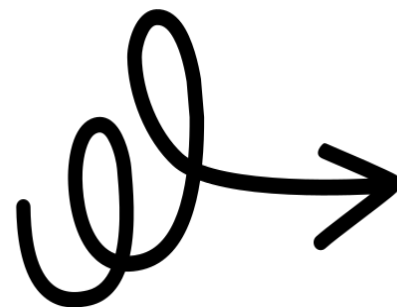
## Open House Tool



# Accessing **Branded Site Tools**



(Note: Agents must always have access to Stars, have a seat in the CRM, and have an agent subdomain made to use the branded site tools) Once your Ylopo Branded Website is live, you can access the Agent Tools page via Stars. You can also get to your Agent Tools page by visiting your Ylopo branded site and adding /tools. Only FUB, LionDesk, Sierra, Lofty, WiseAgent, RealGeeks, Total Brokerage CRMs support direct assignment from tools to agent. Other CRMs must manually assign leads generated from these tools to agents.



# Accessing Ylopo Training & Coaching Resources

The screenshot displays the Ylopo Support Center website. The top navigation bar includes links for Home, Ylopo Services, Money-making Tools, Account Changes, Ylopo Training, Newsletter, and Contact Us. A 'Call Us Now' button is located in the top right corner. The main content area features a large banner with the text 'Start your training journey here!' and a list of resources available to Ylopo users, including Ylopo Training, Ylopo Training Upcoming Events, Access Ylopo's Help Center, Previously Recorded Ylopo Best Practices, Ylopo Coach Connect, Go Live Bootcamp, ROI Diagnostics, Client Checklists, Ylopo Integrations, and Ylopo Terms Glossary. Below the banner, there are four main sections: 'Go Live Bootcamp', 'Coaches Office Hours', 'Realtors-in-Residence Office Hours', and 'Lead Import Mastery'. Each section includes a brief description, a schedule, and a 'Register Now' button. The 'Go Live Bootcamp' section mentions that participants will learn how to use Ylopo's AI technology to help convert their leads. The 'Coaches Office Hours' section states that participants will share their success stories and advice. The 'Realtors-in-Residence Office Hours' section notes that participants will learn how to use Ylopo's AI technology to help convert their leads. The 'Lead Import Mastery' section mentions that participants will learn how to use Ylopo's AI technology to help convert their leads. On the left side of the screenshot, there is a sidebar with a 'LEAD INFORMATION' section containing fields for First Name, Last Name, Email, Phone, and Created. A green arrow points from the 'Training' button in the top navigation bar to the 'LEAD INFORMATION' section. Below the sidebar, there is a circular icon with a house and a dollar sign, labeled 'AVG PRICE'.

**Support Center**

Home Ylopo Services Money-making Tools Account Changes Ylopo Training Newsletter Contact Us

**Start your training journey here!**

As a Ylopo user, you have essential skills and knowledge available to you. We offer five webinars designed to empower you with the insider before to get valuable insights and hands-on guidance from our expert trainers and coaches!

**Go Live Bootcamp**

Compartment your success with this session that covers everything you need to know...then understanding how Ylopo works with your CRM to maximize your smart leads, utilizing Ylopo Stars and leveraging Ylopo AI technology to help you convert your leads!

When: Tuesdays, Thursdays and Fridays 10am-12pm EST

Best for: Ylopo Users in Setup, Newly-Live Users, Newly-Onboarded Account Admins

[Learn More](#)

**Coaches Office Hours**

Come hang out and get all your Ylopo-related questions answered by our resident Coaches, who will share their best practices, strategies, and hacks. Participants also share their success stories and advice, and build community with each other.

When: Every day @ 8am PT/7pm ET

Best for: All Ylopo users

[Register Now](#)

**Realtors-in-Residence Office Hours**

Every Wednesday, our amazing Ylopo Realtors-in-Residence joins Office Hours to do what they do best: inspire and educate the Ylopo community. This is a great opportunity to get face-time with these icons of the industry and pick their brains on everything real estate.

When: Wednesdays @ 8am PT/7pm ET

Best for: All Ylopo users

[Register Now](#)

**Lead Import Mastery**

You know all your leads need to be in Ylopo but you're unsure where to begin? Register for this session to learn the step-by-step of getting your database imported to Ylopo, and see what your leads receive when they're being nurtured by Ylopo.

When: Every other Wednesday @ 1pm PT/4pm ET

Best for: Ylopo users who have not completed a mass lead import

[Register Now](#)

**On-Demand Training**

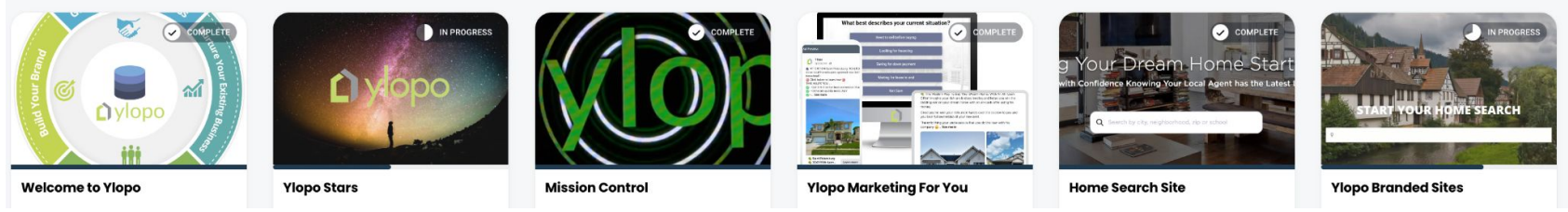
Learn at your own pace, at your own time. We offer free online courses that cover the basics and more. Click on the images to enroll.

**Ylopo New User Training**

**AI Voice 100: Get to Know AI Voice**

**Buyer Agent Commission Mastery**

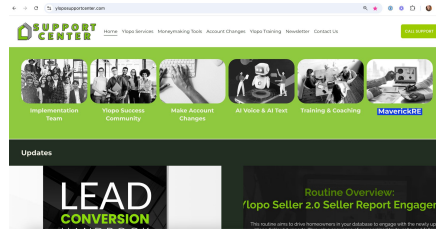
## Online Training



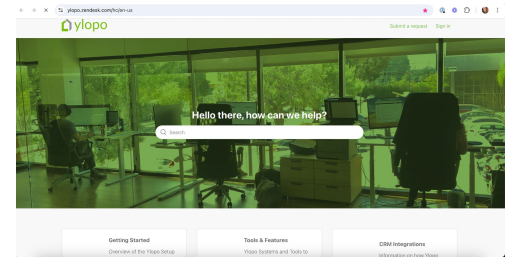
## Live Training



## Ylopo Support Center



## Knowledge Base



# Questions to ask your License Holder

- Do I need to complete the Agent Profile Questionnaire or has this been completed for me?
- Are we using AI text or AI Voice?
- What stages/pipeline/status are on for AI engagement?
- What smartlists are we using to find important Ylopo activity and AI engagement?
- How will I import my contacts into Stars?
- What is our website name?

Q&A