

PREPARE TO LAUNCH WITH YLOPO

Get an overview & guide on what it means to "go live."



EVERY OTHER WEDNESDAY
AT 12PM PST



bit.ly/YourYlopoAccountGoesLive

New Ylopo Client Training Guide (Admins)

Self Paced Training



Welcome to Ylopo



Ylopo Stars



Mission Control



Ylopo Marketing For You



Home Search Site



Ylopo Branded Sites

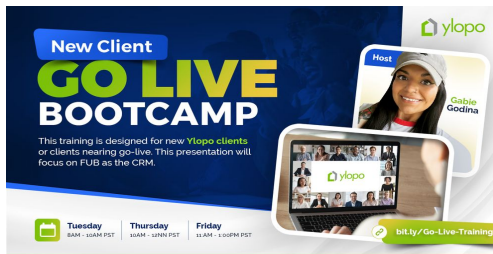


Ylopo & Lofty (formerly Chime)

Live Training



✓ **Implementation:**
License Launch, CRM + Ylopo
Integration



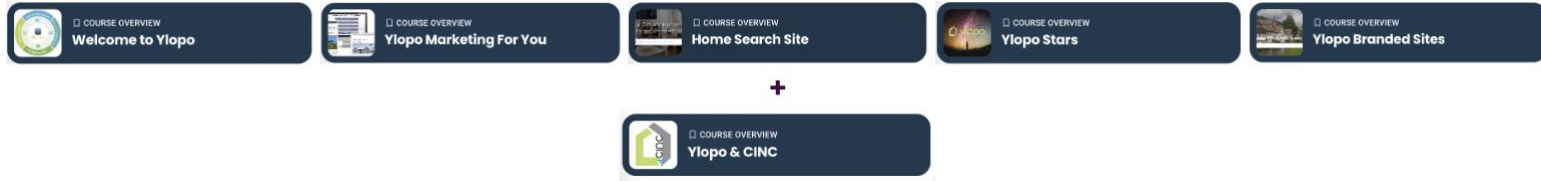
✓ **Post Launch:**
CRM + Ylopo, Ylopo Stars



✓ **Onboarding:**
Additional tools and systems
training for lead conversion

New Ylopo Agent Training Guide (Team Members)

Self Paced New User Training



Live Training



Intro to Ylopo



Engage and nurture database using Stars



Additional tools and systems training for lead conversion

Agenda

- ✓ High Level Overview of (Go Live) Launch with Ylopo
- ✓ Ylopo vs CRM
- ✓ Ylopo + CRM Integration
- ✓ Prep for Mass Lead Import and Seller Import
- ✓ Next Steps and Client Recommendations

Ylopo Go Live/Launch Overview

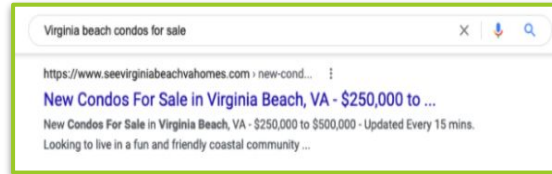


- ❑ Marketing Ads
- ❑ Home Search Site
- ❑ Stars
- ❑ AI Texting/AI Voice
- ❑ Mission Control
- ❑ Ylopo Support Center
- ❑ Meet your Support Team

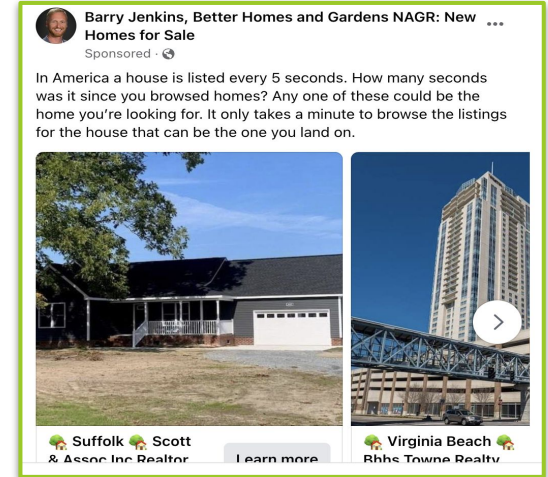
Marketing: Your Ylopo ads are live!



Social Marketing



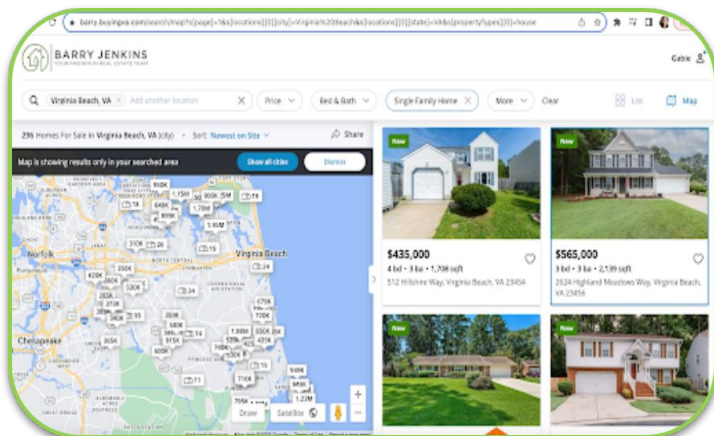
Google PPC



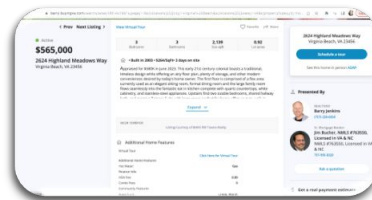
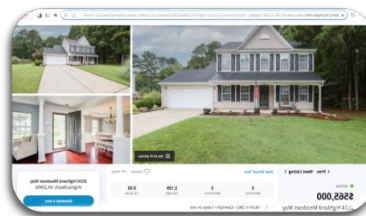
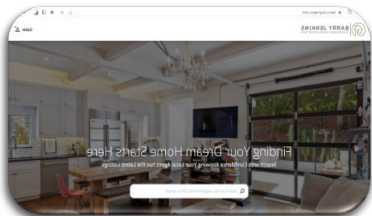
Remarketing

Marketing is live for lead generation, remarketing live to retarget leads

Home Search Site: Used to generate leads, remarketing, keep buyers engaged on your home search site



- ❑ Utilized in all Ylopo marketing and remarketing
- ❑ New visitors are asked to register
- ❑ User activity is synched to Stars, the system integrated with your CRM
- ❑ (Free Optional) Agent Subdomains



Stars Integration: Use Stars tool to engage and nurture

The image displays a web interface for the Stars integration, showing a lead profile for Vanessa. The interface is divided into several sections:

- Lead Information:** Displays key metrics in circular icons: AVG PRICE, LAST VISIT (2 days ago), LISTINGS VIEWED (0), and TOTAL VISITS (1).
- Lead Details:** Includes fields for First Name (Vanessa), Last Name, Email (scentme12@gmail.com), Phone (7148937373), and Created date (9/17/24 5:11pm CDT).
- Agent Toolkit:** A row of buttons for various actions: Create Push Listings, Create New Search and Listing Alerts, Create New Seller Alert, Opt Lead OUT of Priority Alerts, Ylopo RAIYA AI is texting lead (with Pause and Stop buttons), Drip and behavioral texts are enabled, and Opt lead OUT of all listing alerts.
- Lead Message Inbox:** Shows 2 new messages.
- Custom Fields:** A section at the bottom left of the lead details, containing a field labeled "Ylopo Stars Link" with the URL <https://stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438>. A green box highlights this field, and a green arrow points to it with the text "Link to Stars Profile".

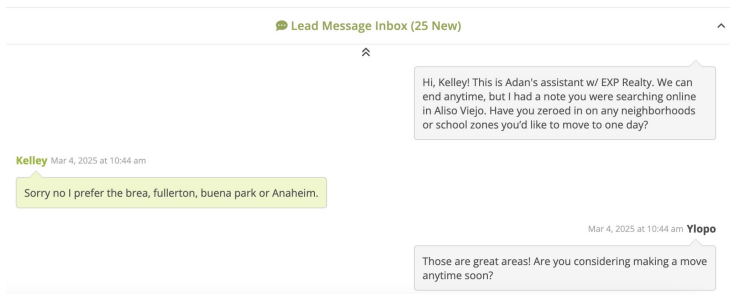
The interface also includes a sidebar with navigation options like People, Inbox, Tasks, Calendar, Deals, and Reporting. The top right shows the user's name (Gabrielle Godina) and a Log Out button.

All Users: Utilize Stars to keep leads engaged on your new home search site with listing alerts, manage your AI texting, send AVM report, use the bad number tool and MORE!

AI Text & AI Voice: Assistants begin outreach

❏ AI texting outreach to new leads, manage in Stars

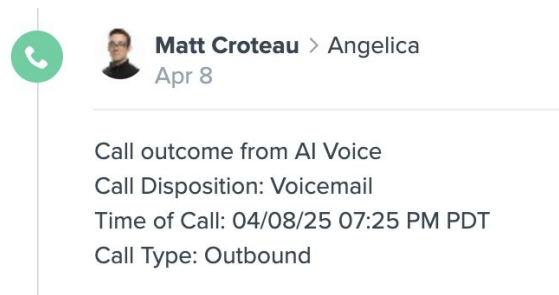
- Stars Online Course, Boot Camp will train on AI texting



AI text outreach begins, manage in Stars

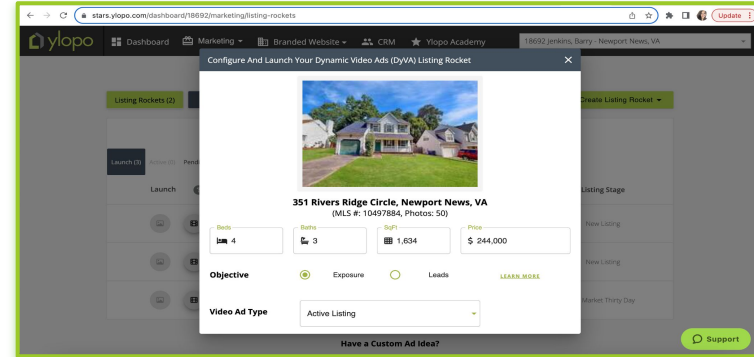
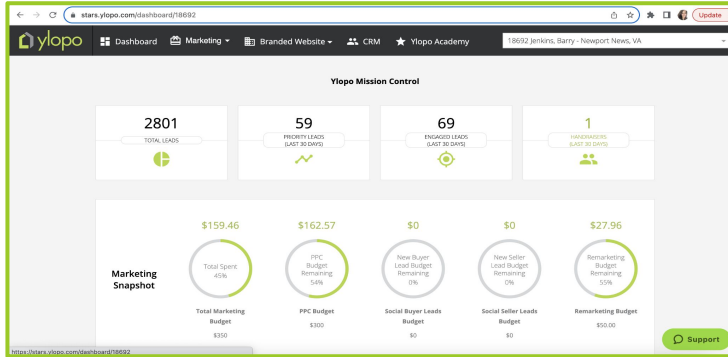
❏ (Optional) AI voice begins calling eligible leads, manage voice through FUB

- AI Voice training should be completed



AI Voice outreach begins, manage through FUB

Mission Control: Manage marketing, view Campaigns, promote listings



Ylopo Admins: View ad spend, adjust marketing areas and budgets, promote single properties on social media with listing rockets and more

- ❑ Marketing will check in 1 month post launch - IMPORTANT TO ATTEND
- ❑ Coassemble course is assigned for admins
- ❑ Live monthly training on Mission Control

Your Ylopo Success Teams

Ylopo Coaching

Join Ylopo Coaches every weekday at 9 AM PST! Our live coaching calls are your go-to space for open Q&A, expert guidance, and hands-on training to help you maximize your ROI.

Get real-time answers, learn what's working for other top agents, and walk away with practical strategies to grow your business with Ylopo.

Ylopo Success

Connect with a Ylopo Success Manager for personalized guidance, strategic insights, and proven best practices.

These sessions are designed to help you fine-tune your approach, maximize your results, and achieve your business goals with confidence.

Ylopo Growth Advisors

Looking to take your business to the next level? Schedule time with a Ylopo Growth Advisor for a high-level strategy session focused on maximizing your results, identifying new opportunities, and making the most of your Ylopo investment.

These conversations are ideal for teams exploring what's next and ready to scale smarter.

www.yloposupportcenter.com

Ylopo Product Support



For the fastest response and resolution, please email our support team.

support@ylopo.com

If you're reporting a bug or issue, including lead examples or screenshots can significantly speed up troubleshooting and help us resolve your concern more efficiently.



Prefer to speak with someone directly?

Call (844) 359-5493

8 AM - 6 PM PST M - F, Connect with a member of our team, including Support, Billing, and Marketing for quick answers and personalized assistance.

Note: Voicemail is monitored over the weekend for urgent issues.



Take full control of your Ylopo experience with our self-service options.

[Yloposupportcenter.com](https://yloposupportcenter.com)

From customizing your branding and managing user access to handling licenses, CRM, marketing campaigns, and AI-powered tools, everything you need to optimize your platform is available at your fingertips.

www.yloposupportcenter.com

Utilize YlopoSupportCenter.com

- **Get Support**

- Ylopo Product Support Help
- Book a Coaching, Strategy or Growth Call

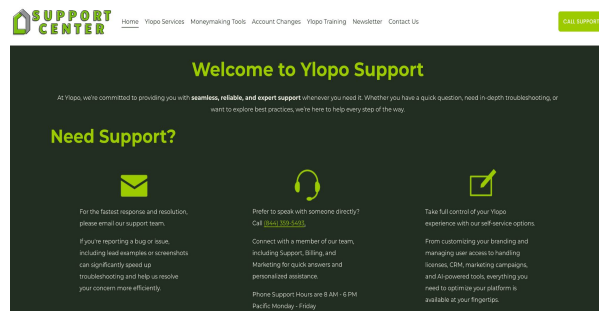
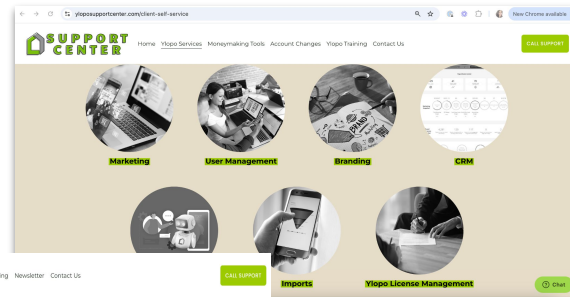
- **Self Service**

- Add/remove Ylopo users
- Update Ylopo services
- Account Changes
- Mass Lead imports

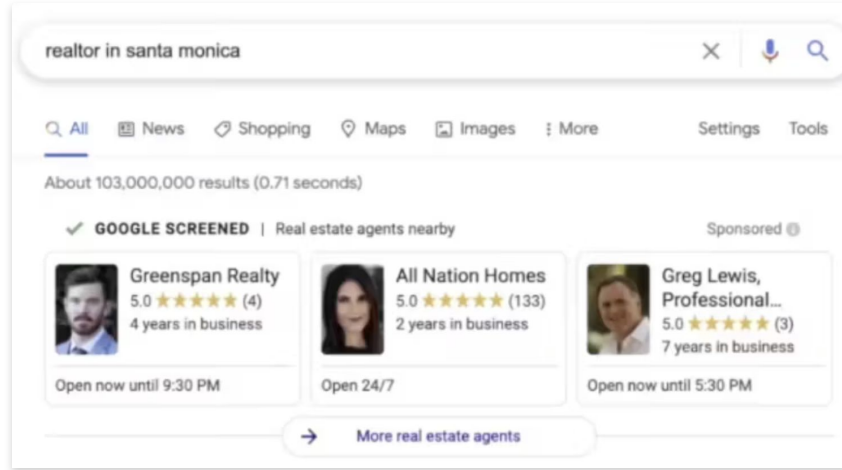
- **Training Guides and Resources**

- Access Ylopo Training
- Access Recordings
- Best Practices

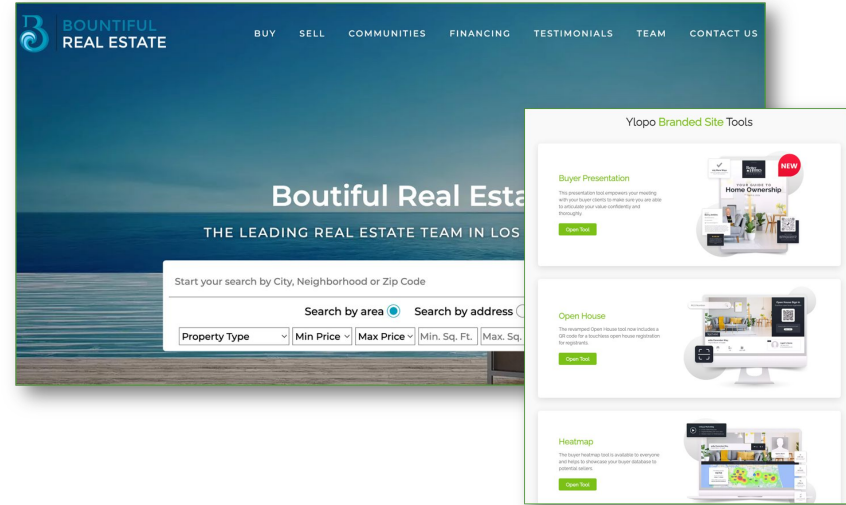
- **& More!**



Not Live: Google LSA & Branded Site

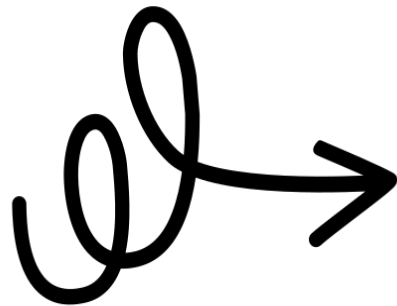


Reach out to LSA@ylopo.com with any questions you have or Schedule a call with our LSA Team.



It can take 3-4 weeks for your Branded Sites draft to be shared once you've completed your Client Information Form & Advertising Areas Form.

Meet with your Branded Site Project Manager to review draft. You must approve site before published.



CRM, Ylopo, and Agent Roles in Online Lead Generation

CRM

Lead Management



- ❑ 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

Ylopo

Marketing, Websites and Agent Tools



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

Agent

Relationship Management



- ❑ Prospect Leads
- ❑ Qualify leads
- ❑ Stage/segment Lead
- ❑ Create relationships
- ❑ Add Value
- ❑ Determine best follow up
- ❑ Stay connected to nurture leads, past clients and your Sphere
- ❑ Add notes/create tasks
- ❑ Work leads and deals

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

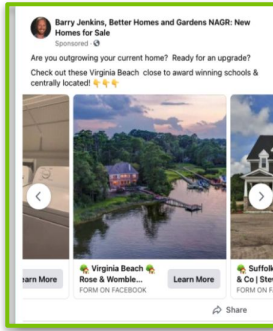
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- ❑ Reporting to track deals
- ❑ Automations for campaigns and repetitive activity
- ❑ CRM Training

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](#)

Ylopo + CRM: New Buyer Lead Journey

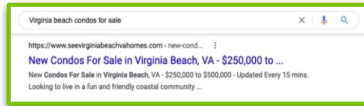
Facebook Social Ads



Lead

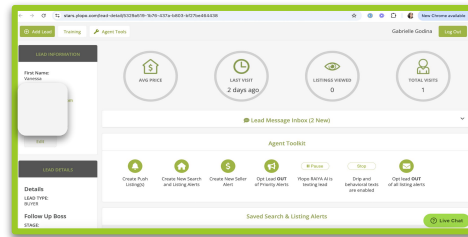
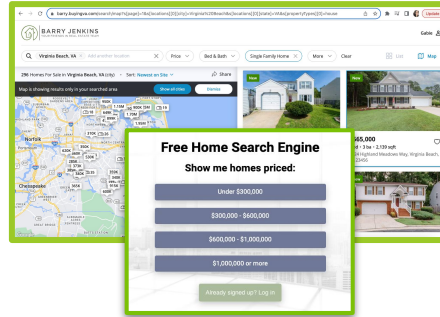


or

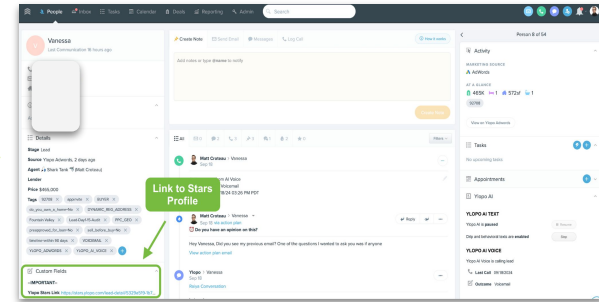


Google PPC Ads

Home Search Site Registration & Profile creation



Lead delivered to CRM to begin outreach, Access Stars Profile through link in CRM



- Stars Profile created
- Saved search created
- Listing alert sent
- Ylopo AI engagement begins
- Lead captured for remarketing

Ylopo + CRM: Lead Sources

The screenshot displays the Ylopo CRM interface. The top navigation bar includes 'People', 'Inbox', 'Tasks', 'Calendar', 'Deals', 'Reporting', and 'Admin' (highlighted with a green box). The 'Lead Flow' tab is selected and highlighted with a green box. A green callout box labeled 'New Ylopo Lead Sources' points to a list of lead sources. The list includes:

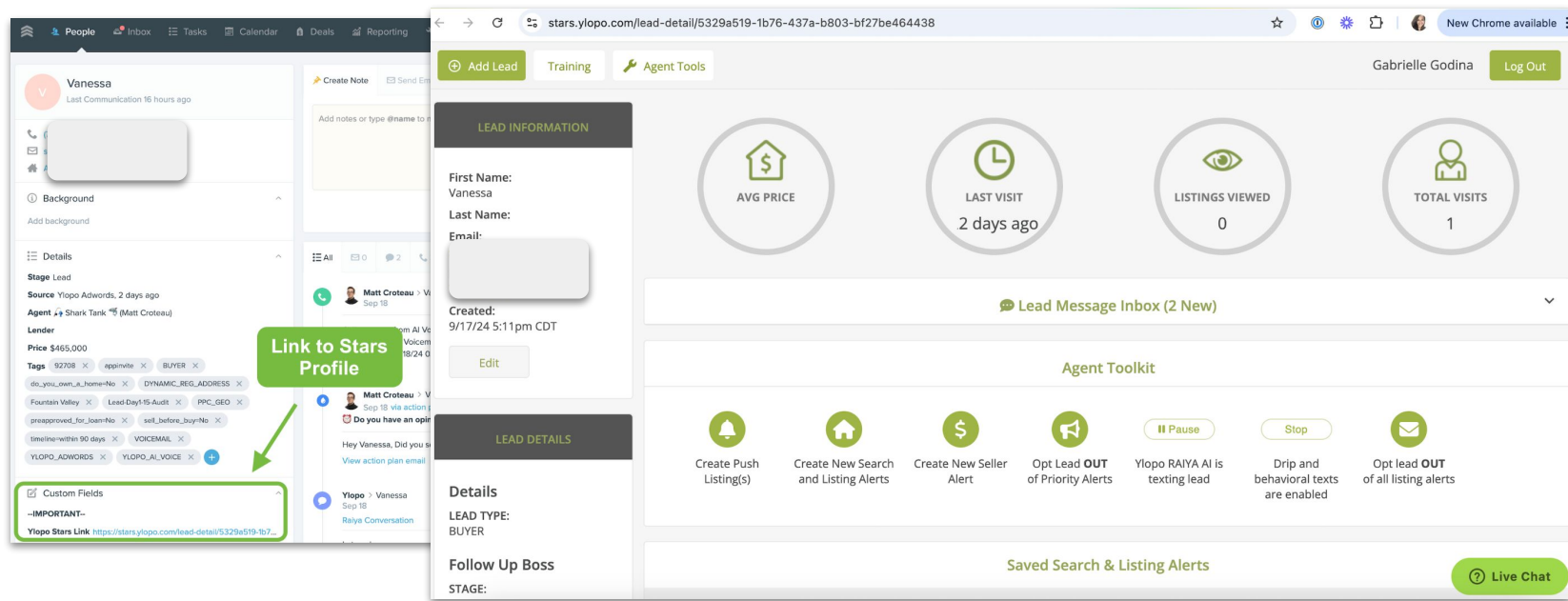
- Ylopo Seller • Sellers • Ge Juefeng (API)**
Last lead • [Ken Mackey](#) • 15 hours ago • 1,962 leads
Advanced Settings • (4) Archive
- Ylopo • Buyers • Ge Juefeng (API)**
Last lead • [Julie TagPonds](#) • 18 hours ago • 11,489 leads
Advanced Settings Archive
- Branded Website • Buyers • Ge Juefeng (API)**
Last lead • [Jackson Core](#) • 3 days ago • 2,283 leads
Advanced Settings Archive

On the right, there are configuration options for each lead source:

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

**Ylopo will only set up lead distribution for AI Voice eligible lead sources based on your AI Voice set up.
Advise which lead sources to Auto-import into Ylopo Stars (if CRM applicable)**

Ylopo + CRM: Link to Stars



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.

Ylopo + CRM: Stage

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 profile, including contact information, background, and details. The main panel shows a list of communications, including a call outcome from AI Voice and a message from Matt Croteau. The right sidebar shows activity, marketing source (AdWords), and tasks.

Stage Lead

Source Ylopo Adwords, 2 days ago

Agent Shark Tank (Matt Croteau)

Lender

Price \$465,000

Tags 92708, appinville, BUYER, do_you_own_a_home-No, DYNAMIC_REG_ADDRESS, Fountain Valley, Lead-Day1-15-Audit, PPC_GEO, preapproved_for_loan-No, sell_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/5329a519-1b7...>

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

Stage/Status/Pipeline: AI blocked or allowed

Ylopo + CRM: Stage

AI Text

✓ Recommended 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 Call Stages:

- Lead
- Attempted Contact

Let your Implementation Specialist know if you need to review or make changes

Ylopo + CRM: Assigned Agent

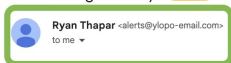
The screenshot displays the Ylopo CRM interface. The top navigation bar includes links for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin, along with a search bar and communication icons. The main view shows a lead profile for Vanessa, with a 'Last Communication 5 days ago' status. The 'Details' section on the left lists various attributes: Stage Lead, Source (Ylopo Adwords, 2 months ago), Agent Me (highlighted with a green box and arrow from a green 'Assigned Agent' label), Lender, Price (\$465,000), Timeframe, and Tags (92708, appinvite, BUYER, do_you_own_a_home=No). The central area shows a call log entry from Matt Croteau to Vanessa on Nov 2, with details about the call outcome and disposition. The right sidebar contains sections for Activity (Marketing Source: AdWords, AT A GLANCE: 459K, 1, 572sf, 1, 92708), Tasks (No upcoming tasks), Appointments (No upcoming appointments), and Ylopo AI (YLOPO AI TEXT).

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

Ylopo + CRM: Assigned Agent

Listing Alerts/Seller Alerts

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



[Unsubscribe](#)

Fri, Nov 1, 2024, 9:49 AM

Hi Gabie,

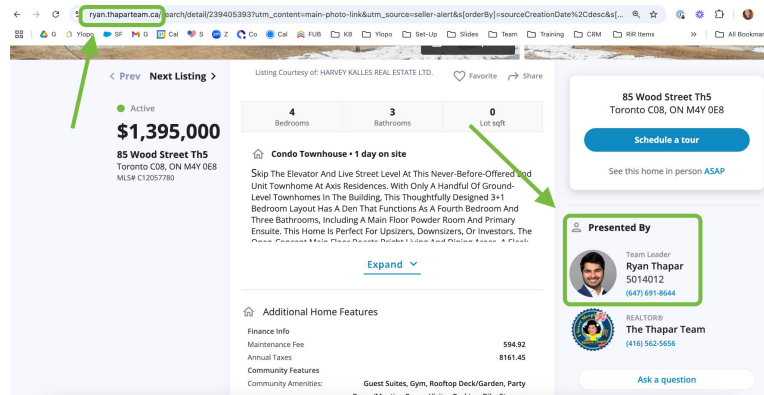
Here are the latest market trends in M8Y 4G8.

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

Click to unlock your estimated home value



(Optional) Agent Home Search Site



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](#) [Starts](#)

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 Box](#) (mobile)

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

Contact us at support@ylopo.com if you have any questions!

Ylopo + CRM: Activity

The screenshot displays the Ylopo CRM interface for a lead named Vanessa. The top navigation bar includes links for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin, along with a search bar and communication icons. The left sidebar shows the lead's profile, background, and details. The main area features a 'Create Note' section and an activity feed. A green box labeled 'Lead Activity' points to a registration event in the feed. The right sidebar shows a summary of the lead's activity, including marketing sources and AI text status.

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 TEXT

Ylopo AI is **paused**

Drip and behavioral texts are **enabled**

Registration from Ylopo page

...k3gSvGBKbLgOOEDxy7ZIIYXL3NY78v46RJxprBy51EqAahoCOR
QQAvD_BwE
Sep 17

17200 Newhope Street 123, Fountain Valley, CA 92708 - view map
MLS#OC24177900

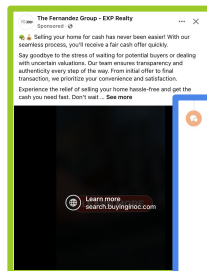
via: **Ylopo Adwords** • Buyers • Matt Croteau (API)

Ylopo ID: 55665438
Lead Type: BUYER
Ad Platform: YLOPO ADWORDS

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

Ylopo + CRM: Activity

Ad Engagement



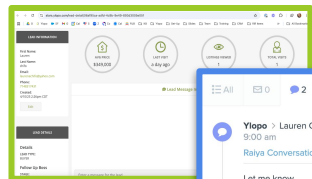
The Fernandez Group - EXP Realty
Sponsored

Setting your home for sale 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 situations. 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

Learn more
search.buying@ERC.com

Registration from Ylopo page
...HJN8DyMymNVYIEBQJ5Sew57z5U91_Kse8GTTnwIOBxCi0
QAVD_BwE
Apr 13
\$95 S Avenida Pico, Anaheim Hills, CA 92867 - view map
MLS#FW29073696
via: Ylopo Adwords - Buyers - Matt Croteau [API]
Ylopo ID: 6975849
Lead Type: BUYER
Ad Platform: YLOPO_ADWORDS
Timeline_tag: 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_bedrooms_next_home: 2+
What_size_home_searching_for: 1500 - 2500 sq ft
How Often send_listing_alerts: Daily

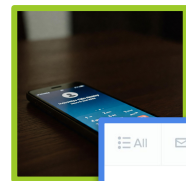
AI Text



Ylopo > Lauren Chifo
9:00 am
Raiya Conversation
Let me know

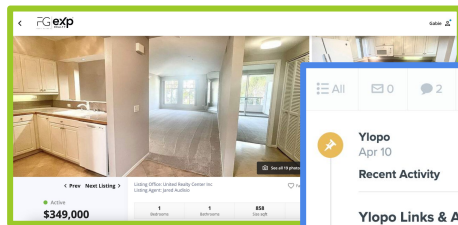
Ylopo > Lauren Chifo
8:25 am
Raiya Conversation
Hi Lauren! I am Matt's assistant. Matt may have reached out earlier and I wanted to follow up to find out your ideal property preferences so we can send some properties to you. Do you have a preferred location or bed/bath requirement? Also, we can end these 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



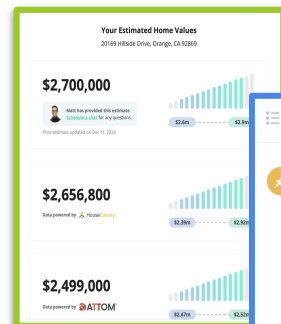
Ylopo
Apr 10
Recent Activity

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



Your Estimated Home Values
2018 Hillside Drive, Orange, CA 92669

\$2,700,000
\$2,656,800
\$2,499,000

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>

Ylopo + CRM: 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 profile, including contact information, background, and details. The 'Details' section is expanded, showing the lead's stage (Lead), source (Ylopo Adwords), agent (Matt Croteau), lender, and price (\$465,000). A green box highlights the 'Tags' section, which contains various lead activity and AI-related tags. A green arrow points from the 'Tags' label to this section. The main content area shows a list of messages and calls from Matt Croteau to Vanessa. The right sidebar shows the 'Activity' section, including marketing source (AdWords), at a glance statistics, tasks, appointments, and Ylopo AI settings.

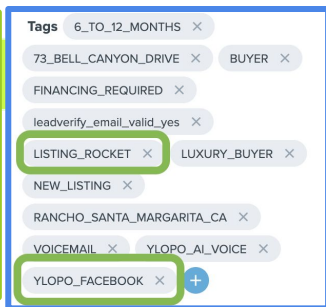
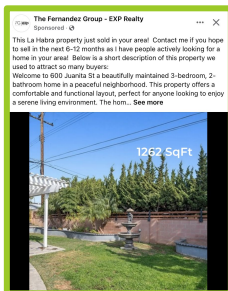
Tags

Tags: 92708 X, appinville X, BUYER X, do_you_own_a_home-No X, DYNAMIC_REG_ADDRESS X, Fountain Valley X, GHOST_CALL 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

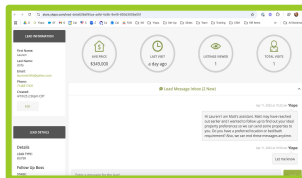
Tags will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database, route leads, create automations - IMPROVE YOUR CRM WORKFLOW

Ylopo + CRM: Tags examples

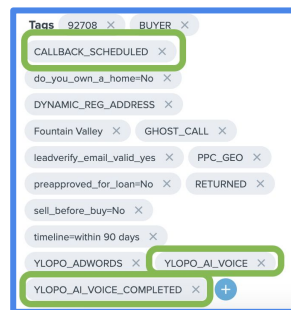
Ad Engagement



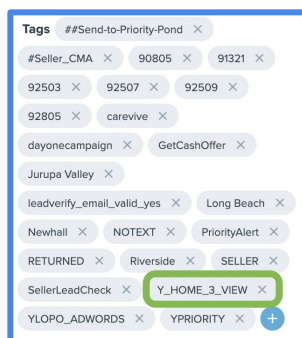
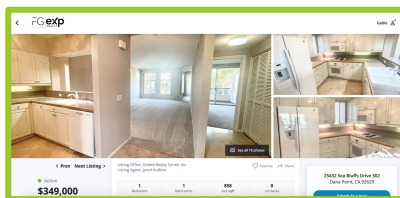
AI Text



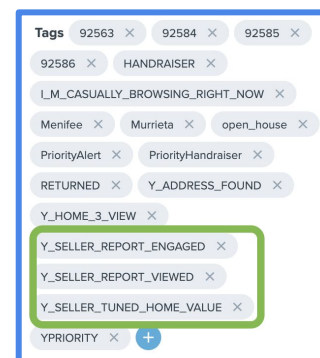
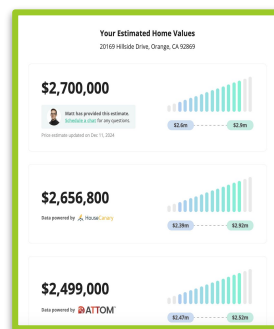
AI Voice



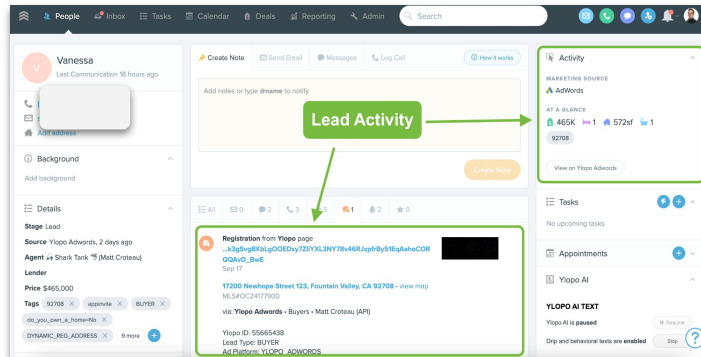
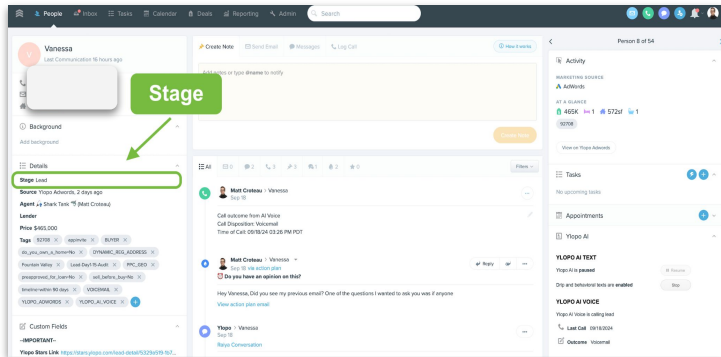
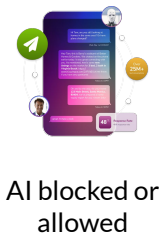
Home Search Site Activity



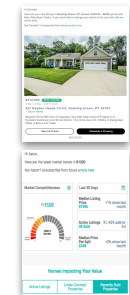
Seller Report & Listing Alerts



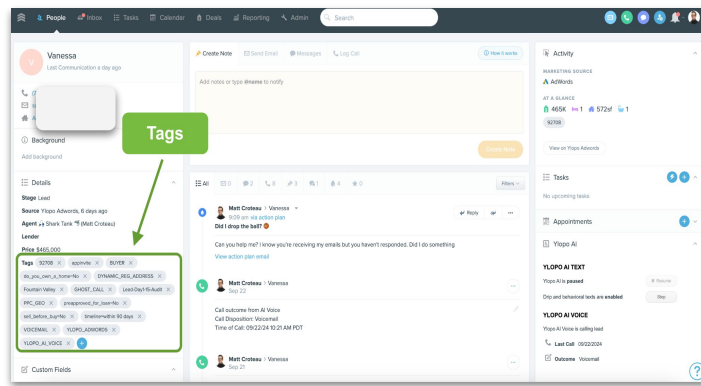
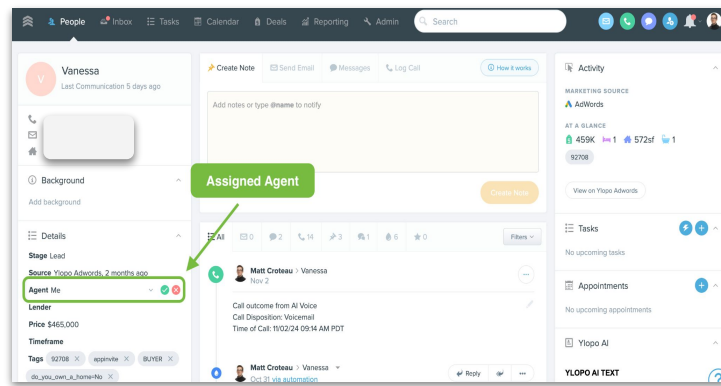
Ylopo + CRM: Integration Review



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



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



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

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) 918-9591

Your seller lead Theresa ylopo seller report with a message: Inground Pool. View in CRM <https://app.followupboss.com/2/people/view/18258>

Priority Email sent to agent

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

notification@ylopo.com
to me + 10:26 AM (4 hours ago) ☆

PRIORITY LEAD ALERT: Theresa bell

Phone Number: [redacted]

Your seller lead Theresa [redacted] 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](#) [View](#)

- Mark the Priority Lead task as "Done" by clicking [here](#).
- View lead in [Sales 360](#) [\(read\)](#)

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

Contact us at 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

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 +

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 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

notification@ylopo.com
to: you

We sent Brenda Wheaton "Hi, Brenda? This is local home search assistant 'Hi Ylopo'. If you prefer I do not text you just reply stop, but I had a note you were something into your search area. Have you searched in or are neighborhood in about areas you'd like to move to in the next 6-12 months? 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 lead in [LeadStack](#)
View in [Ylopo Sites](#)

To get the lead out of Ylopo leads, [click here!](#)
To get a lead back in to behavioral leads, [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

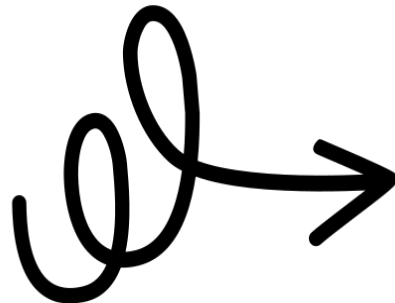
I_NEED_TO_SELL_BEFORE_I_CAN_BUY X

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 .



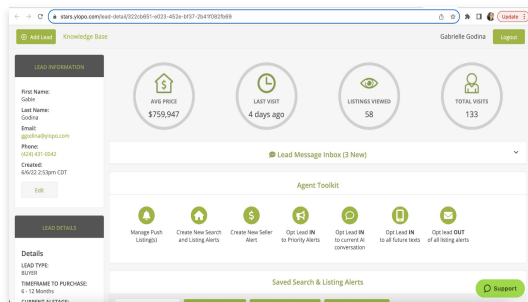
Mass Lead Import



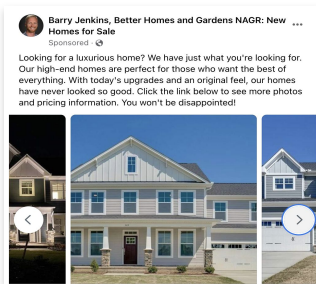
Best for importing large buyer and remarketing only contacts into Stars

Prep:

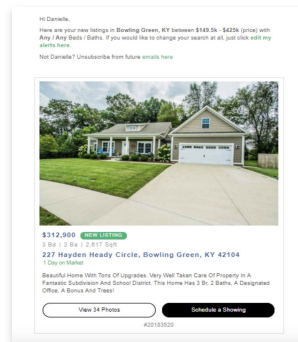
- ❑ Import leads into CRM, email must be present
- ❑ Export saved searches to be used for existing e-alerts
- ❑ Your Implementation Specialist will provide you further instructions



Import into Stars



Remarketing



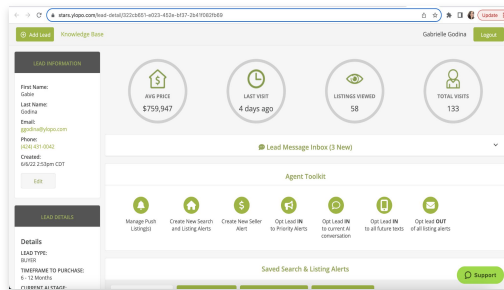
Optional Listing Alert

Seller Leads Import

Best for targeting sellers/home owners

Prep:

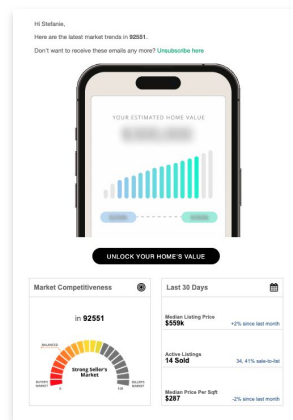
- ❑ Import leads into CRM, email must be present
- ❑ Ensure lead/client addresses are present
- ❑ Only import seller leads that are either past clients or generated seller leads
- ❑ Your Implementation Specialist will provide you further instructions



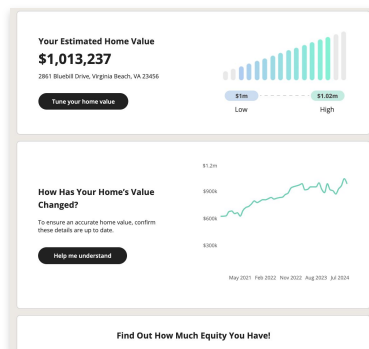
Import into Stars

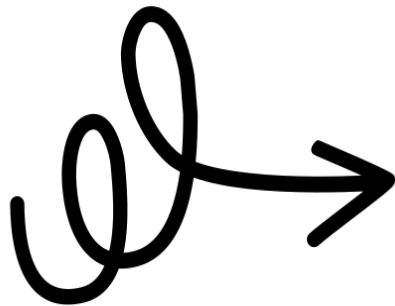


Remarketing



Seller Alert/Seller Report





Next Steps before Go Live!

- ❑ Continue to work with your Implementation Specialist in Base Camp
- ❑ Understand your CRM features and functionality
- ❑ Complete Ylopo New User online training
- ❑ Approve your Home Search Site
- ❑ Prep your CRM/database for import
- ❑ Attend Ylopo New Client Bootcamp

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

