

# 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](http://bit.ly/YourYlopoAccountGoesLive)

# 2026 CHARLESTON



SUCCESS SUMMIT  
**CHARLESTON**



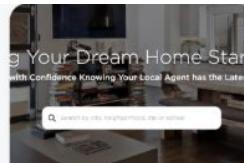
Tuesday and Wednesday  
May 19<sup>th</sup> & 20<sup>th</sup> 2026



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

# New Ylopo Client Training Guide (Admins)

## Self Paced Training



Welcome to Ylopo

Ylopo Stars

Mission Control

Ylopo Marketing For You

Home Search Site

Ylopo Branded Sites

## Live Training



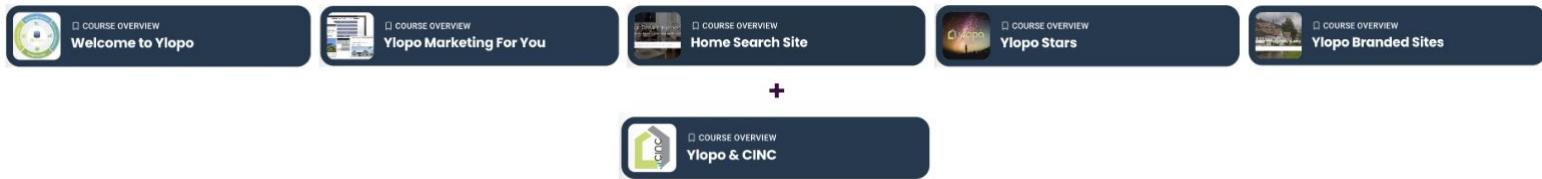
**Implementation:**  
License Launch, CRM + Ylopo  
Integration

**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
- ✓ CRM, Agent and Ylopo roles
- ✓ Ylopo + CRM Integration
- ✓ Prep for Mass Lead Import and Seller Import
- ✓ Next Steps and Client Recommendations

# Ylopo Go Live/Launch Overview



- ❑ Ylopo Onboarding
- ❑ Marketing Ads
- ❑ Home Search Site
- ❑ Stars
- ❑ AI Texting/AI Voice
- ❑ Mission Control
- ❑ Coaches Office Hours

# 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

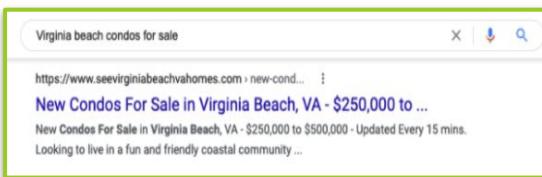
- Agent Power Tools
- AI Performance Review
- Support at Your Fingertips
- Optimization

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

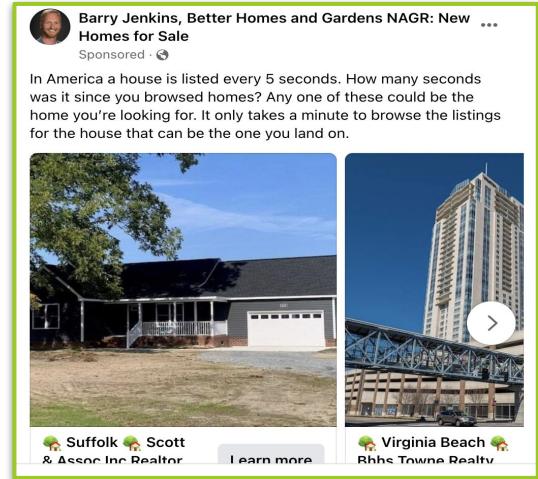
# Marketing: Your Ylopo ads are live!



Social Marketing



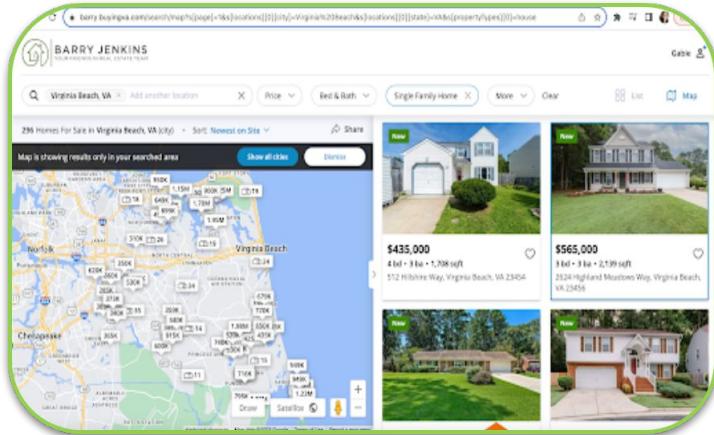
Google PPC



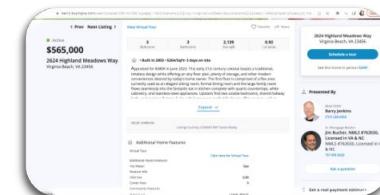
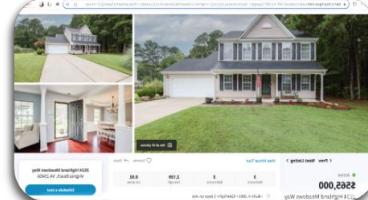
Remarketing

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



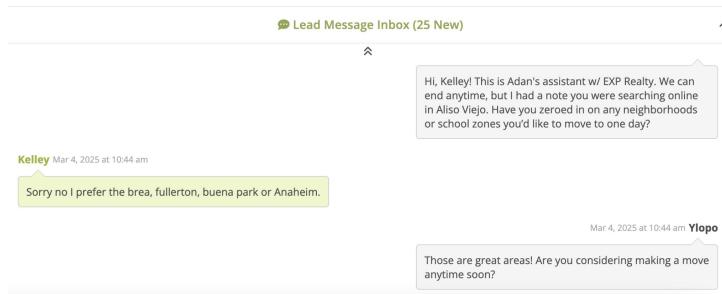
# Stars Integration: Use Stars tool to engage and nurture

The screenshot displays the Yolo Stars integration interface. On the left, a sidebar shows lead details for 'Vanessa' (First Name: Vanessa, Last Name: , Email: scsentme12@gmail.com, Phone: 7148937373). A green box highlights the 'Link to Stars Profile' button, with an arrow pointing to the 'Yolo Stars Link' in the custom fields section. The main content area shows 'LEAD INFORMATION' for Vanessa, including her contact info and a timeline entry from 'Matt Croteau' on Sep 18. Below this is the 'LEAD DETAILS' section with 'LEAD TYPE: BUYER' and 'Follow Up Boss' assigned to 'STAGE:'. To the right, four circular metrics are displayed: 'AVG PRICE' (">\$), 'LAST VISIT' (2 days ago), 'LISTINGS VIEWED' (0), and 'TOTAL VISITS' (1). The 'Agent Toolkit' section contains buttons for creating push listings, alerts, and seller alerts, as well as options for pausing or stopping lead tracking. A 'Saved Search & Listing Alerts' section is also present. The top navigation bar includes links for People, Inbox, Tasks, Calendar, Deals, Reporting, Admin, and a search bar. The URL in the browser is stars.yolo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438.

**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
- ❑ (Optional) AI voice begins calling eligible leads, manage voice through FUB
  - AI Voice training should be completed



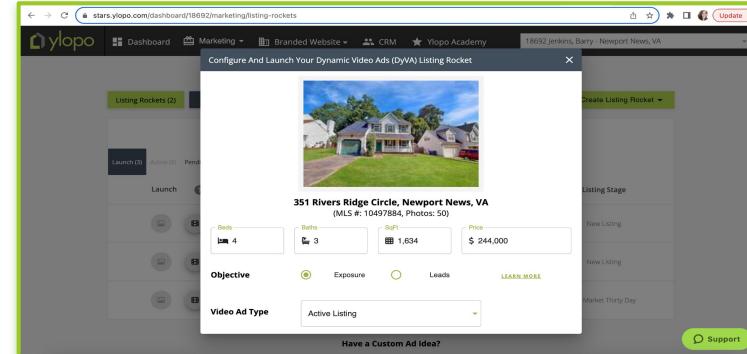
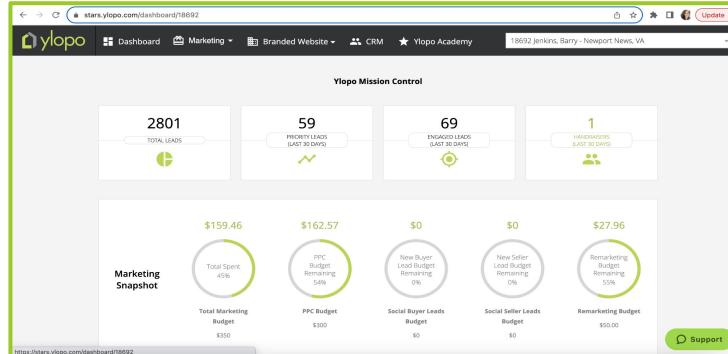
AI text outreach begins, manage in Stars



Call outcome from AI Voice  
Call Disposition: Voicemail  
Time of Call: 04/08/25 07:25 PM PDT  
Call Type: Outbound

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, manage AI stages, promote listings with listing rockets and more!**

- ❑ Marketing will check in 1 month post account launch - **IMPORTANT TO ATTEND**
- ❑ Expect lower lead volume and higher CPL in first 30 days
- ❑ Coassemble course on Mission Control assigned for admins



# COACHES OFFICE HOURS

Learn from the experts!

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**

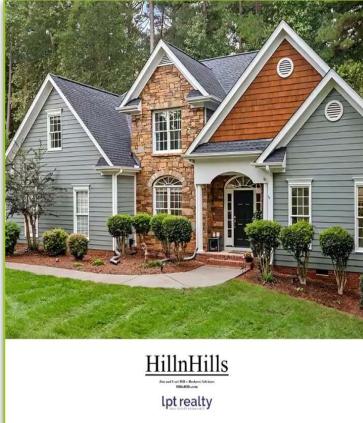
Ylopo Coach



HOST

**Marissa Canario**

Ylopo Coach



## ASSIGNED COLLECTIONS

### New and Active Leads

1 New

25

2 Ypriority/Handraisers

4

3 Seller Report Engaged

178

4 AI Text Replies

402

### Pipeline Follow-Up

5 Recently Active

59

6 Hot Needs Communication

238

7 Warm/Cold Needs Commu...

685

8 Past Clients / Sphere

826

Get Your Free Home Analysis!

Find out your home value, home equity, refinance and mortgage reduction and much more!

Enter the address you want to analyze

Unit #

Let's get your report

**Matt Croteau, REALTOR®** (949) 554-7982 | matt@mattsellsoc.com

**Your Estimated Home Values**  
172 Intrigue, Irvine, CA 92620

**\$1,892,000**  
Data powered by HouseCanary

**\$1,769,750**  
Data powered by ATTOM

**SELLER MARKETING REPORT**  
600 Juanita Street, La Habra, CA 90631

**Most Recent Ad Results**

5,706 People who view your ad	12,227 Clicked Ad
4,588 People who clicked your video	9,831 Clicked Your Video
670 People who expressed interest	1,436 Shared Express Interest

**Listing Rocket Ad Example**

**Your Local Market**

2,710,000 400 Juanita Street, La Habra, CA 90631 4 Bed + 2 Bath + 1607 sq ft	2,670,000 400 Juanita Street, La Habra, CA 90631 3 Bed + 2 Bath + 1688 sq ft	2,650,000 407 Buena Vista Avenue, La Habra, CA 90631 3 Bed + 2 Bath + 1927 sq ft
2,650,000 401 N Holgate Street, La Habra, CA 90631 3 Bed + 2 Bath + 1607 sq ft	2,600,000 160 Wade Street, La Habra, CA 90631 4 Bed + 2 Bath + 1607 sq ft	2,550,000 300 Gentry Street, La Habra, CA 90631 3 Bed + 2 Bath + 1607 sq ft

**Recently Sold**

Street Address	Bed + Bath	Sale
400 Juanita Street, La Habra, CA 90631	3 Bed + 2 Bath	\$1,850,000 (\$131/sqft)
350 Gentry Street, La Habra, CA 90631	3 Bed + 2 Bath	\$1,800,000 (\$148/sqft)
1851 Berry Street, La Habra, CA 90631	4 Bed + 2 Bath	\$1,750,000 (\$120/sqft)
411 N Holgate Street, La Habra, CA 90631	3 Bed + 2 Bath	\$1,700,000 (\$120/sqft)
160 Wade Street, La Habra, CA 90631	4 Bed + 2 Bath	\$1,650,000 (\$104/sqft)

**FG exp REALTY**

**YOUR GUIDE TO Home Ownership**  
Matt Croteau Presents To Jonathan Davis

**Knowledge. Experience. Professionalism**

# Ylopo Product Support



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

[support@ylopo.com](mailto: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](http://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](http://www.yloposupportcenter.com)

# 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](http://www.yloposupportcenter.com)

# Utilize YlopoSupportCenter.com

- **Get Support**
  - Ylopo Product Support Help
  - Book a Coaching Call
- **Self Service**
  - Add/remove Ylopo users
  - Update Ylopo services
  - Account Changes
  - Mass Lead imports
- **Training Guides and Resources**
  - Sign up for Ylopo Training
  - Access Recordings
  - Best Practices
- **& More!**

The screenshot displays the YlopoSupportCenter.com website, featuring a navigation bar with links to Home, Ylopo Services, Moneymaking Tools, Account Changes, Ylopo Training, Newsletter, Contact Us, and a 'CALL SUPPORT' button. Below the navigation is a grid of circular icons representing different service areas: Marketing, User Management, Branding, CRM, Imports, and Ylopo License Management. The main content area is titled 'Welcome to Ylopo Support' and includes a sub-section 'Need Support?' with three options: 'Email', 'Call (888) 561-6333', and 'Chat'. Each option has a brief description and a small icon. Below this is an 'On-Demand Training' section with three course thumbnails: 'Ylopo New User Training', 'Conversion Masterclass', and 'Buyer Agent Commission Mastery'. Each thumbnail includes a brief description and a 'CALL SUPPORT' button. The footer of the page includes social media links (Facebook, Twitter, LinkedIn) and a 'CALL SUPPORT' button.

# Not Live: LSA, GBP & Branded Site

realtor in santa monica

Google Screened | Real estate agents nearby

**Greenspan Realty**  
5.0 ★★★★★ (4)  
4 years in business  
Open now until 9:30 PM

**All Nation Homes**  
5.0 ★★★★★ (133)  
2 years in business  
Open 24/7

**Greg Lewis, Professional...**  
5.0 ★★★★★ (3)  
7 years in business  
Open now until 5:30 PM

More real estate agents

BOUNTIFUL  
REAL ESTATE

BUY SELL COMMUNITIES FINANCING TESTIMONIALS TEAM CONTACT US

Bountiful Real Estate  
THE LEADING REAL ESTATE TEAM IN LOS

Start your search by City, Neighborhood or Zip Code

Search by area  Search by address

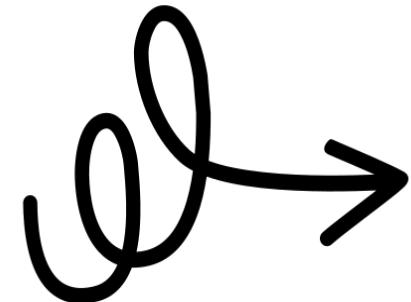
Property Type

Ylopo Branded Site Tools

Buyer Presentation

Open House

Heatmap



# 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

## 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

## 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

# Integration

## Ylopo



- 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

## CRM



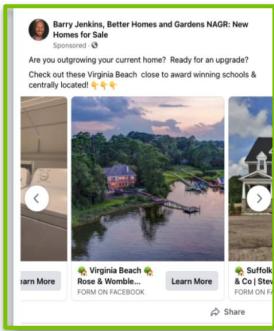
- Leads are delivered, routed
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- Leads and contacts worked by agents - calls, texts, emails logged
- Database nurtured by campaigns
- Reporting to track deals
- Automations for campaigns and repetitive activity
- CRM Training

**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](#)

# Ylopo + CRM: New Buyer Lead Journey

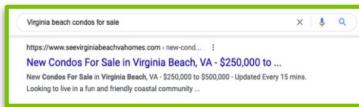
## Facebook Social Ads



Lead

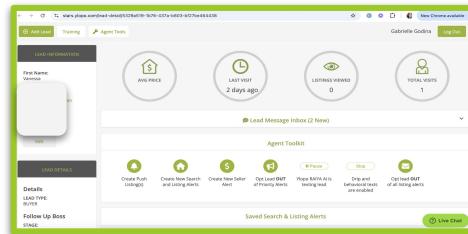
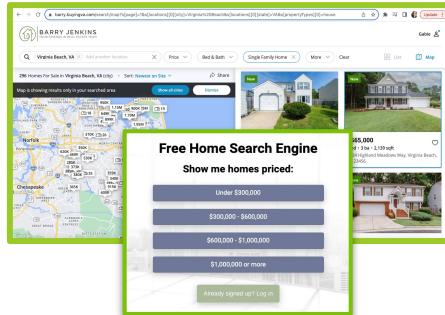


or



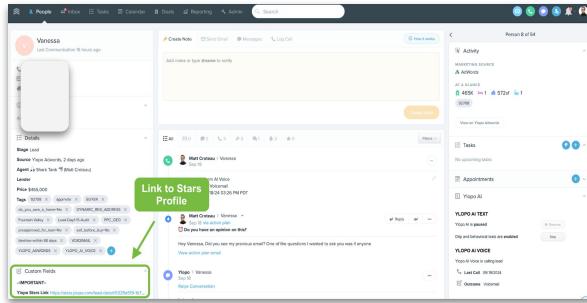
## Google PPC Ads

## Home Search Site Registration & Profile creation



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

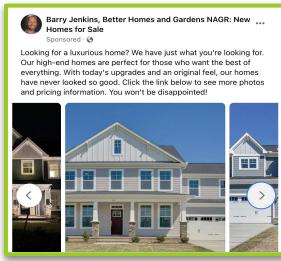
Lead delivered to CRM to begin outreach, Access Stars Profile through link in CRM



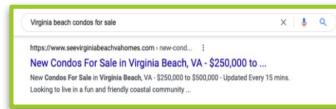
# CRM + Ylopo (Stars): Sources

## Ylopo Lead Source:

### Home Search Site: Facebook/Social



### Home Search Site: Google Ads/PPC



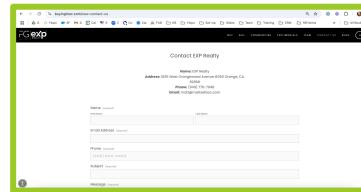
## Ylopo Source Name in FUB:

- Ylopo Buyers
- Ylopo Sellers
- Direct Connect FB
- Ylopo Adwords, Ylopo LSA
- Direct Connect PPC



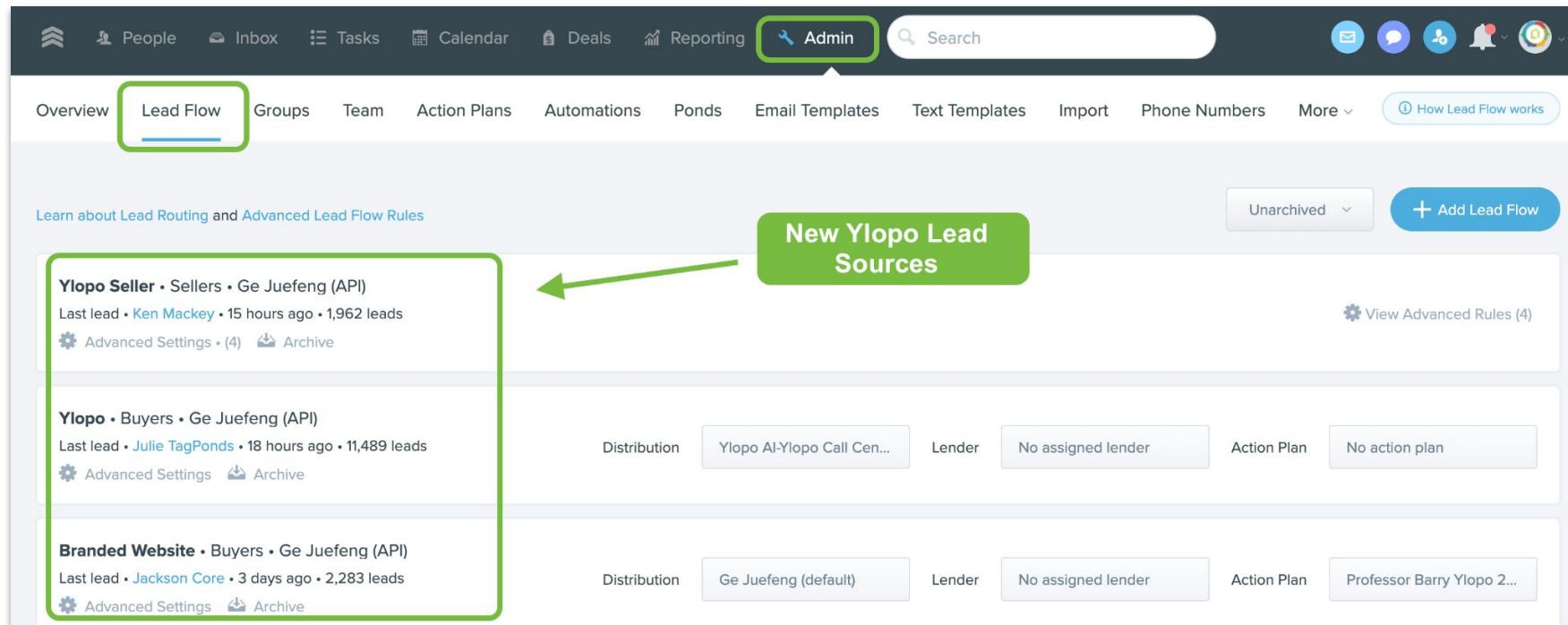
### Branded Site, Branded Sites Tools Page Tools

### Branded Site: Open House Tool



- Branded Website
- Open House (Ylopo)

# Ylopo + CRM: Lead Sources



Learn about Lead Routing and Advanced Lead Flow Rules

Unarchived  + Add Lead Flow

**New Ylopo Lead Sources**

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

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...

**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

The screenshot illustrates the integration between Ylopo's CRM and its database marketing tool, Stars. On the left, the Ylopo CRM interface shows a lead profile for 'Vanessa' with various details like stage (Lead), source (Yopo Adwords), and tags (e.g., BUYER, VOICEMAIL). A green callout box labeled 'Link to Stars Profile' points to the 'Link to Stars' button in the lead's details. On the right, the Stars interface displays lead information (First Name: Vanessa, Last Name: , Email: ), lead details (Created: 9/17/24 5:11pm CDT), and a summary of lead activity (Avg Price, Last Visit, Listings Viewed, Total Visits). The interface also includes an Agent Toolkit with various marketing and tracking tools, and a Saved Search & Listing Alerts section. A 'Live Chat' button is visible in the bottom right corner.

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

Vanessa  
Last Communication 16 hours ago

Stage

Background

Stage Lead

Source Ylopo Adwords, 2 days ago

Agent 🐠 Shark Tank (Matt Croteau)

Lender

Price \$465,000

Tags 92708, appinvite, BUYER, do\_you\_own\_a\_home=No, DYNAMIC\_REG\_ADDRESS, Fountain Valley, Lead-Day-15-Audit, PPC\_GEO, preapproved\_for\_loan=No, sell\_before\_buy=No, timeline:within 90 days, 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

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

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

Raya Conversation

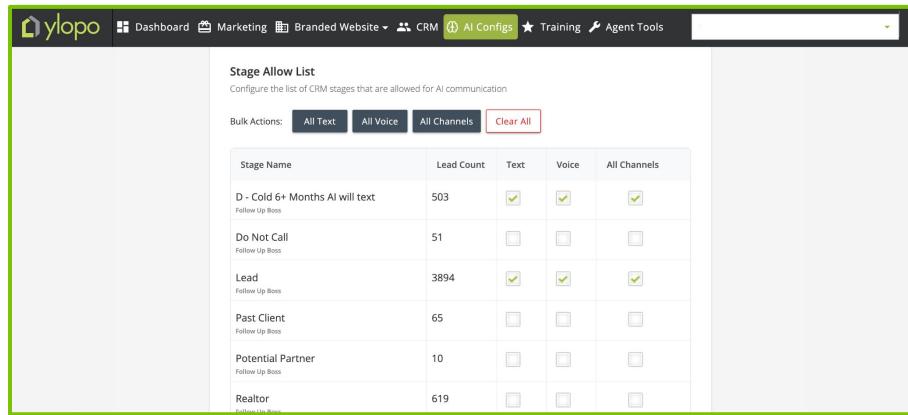
Stage/Status/Pipeline: AI blocked or allowed

# Ylopo + CRM: Stage

**AI**

**Recommended blocked stages**

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



Ylopo

Dashboard Marketing Branded Website CRM AI Configs Training Agent Tools

Stage Allow List

Configure the list of CRM stages that are allowed for AI communication

Bulk Actions: All Text All Voice All Channels Clear All

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

*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*

# Ylopo + CRM: Assigned Agent

The screenshot displays the Ylopo + CRM interface. At the top, a navigation bar includes links for People, Inbox, Tasks, Calendar, Deals, Reporting, Admin, and a search bar. Below the navigation is a header for a contact named 'Vanessa', showing a recent communication from 5 days ago. The main workspace features a 'Create Note' button and links for Send Email, Messages, and Log Call. A central text input field allows notes to be added or @names to be notified. A green callout box labeled 'Assigned Agent' points to the contact details for 'Matt Croteau' and 'Vanessa', which are listed under the 'Agent Me' section. The contact details show a call outcome from AI Voice, a voicemail disposition, and a specific time of 11/02/24 09:14 AM PDT. To the right, a sidebar titled 'Activity' provides marketing source information (AdWords) and an at-a-glance summary of 459K, 1, 572sf, 1, and 92708. Below this are sections for Tasks (no upcoming tasks) and Appointments (no upcoming appointments). The bottom right corner features a 'YLOPO AI TEXT' section with a question mark icon.

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

# Ylopo + CRM: Assigned Agent

## Listing Alerts/Seller Alerts

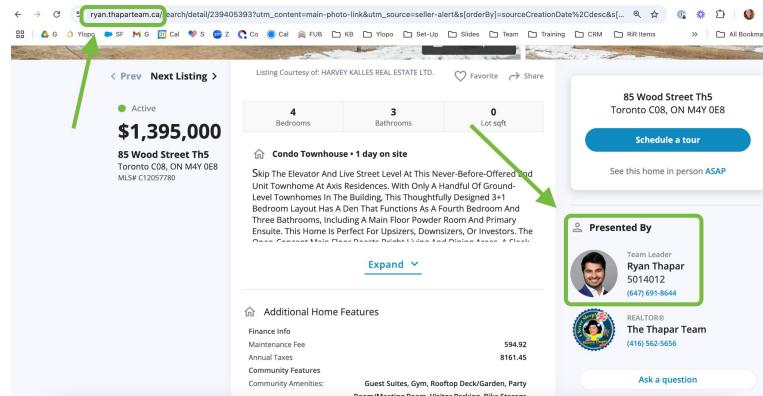
Your Home Value Report has been created, Gabie! Also, there are 5 active listings nearby! [External](#) [New Agent Training](#)



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



## (Optional) Agent Home Search Site



ryan.thaparteam.ca/search/detail/239405393?utm\_content=main-photo-link&utm\_source=seller-alert&[orderBy]=sourceCreationDate%20desc&[...]

**85 Wood Street Th5**  
Toronto C08, ON M4Y 0E8

**\$1,395,000**  
4 Bedrooms, 3 Bathrooms, 0 Lot/soft

Condo Townhouse • 1 day on site

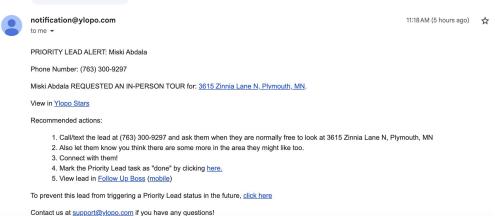
Skip The Elevator And Live Street Level At This Never-Before-Offered 10th Floor Townhouse At Axis Residences. With Only A Handful Of Ground-Level Apartments In The Building, This Thoughtfully Designed 3+1 Bedroom Layout Has A Den That Functions As A Fifth Bedroom, And Three Bathrooms, Including A Main Floor Powder Room. And Primary Ensuite. This Home Is Perfect For Upstagers, Downziners, Or Investors. The

**Presented By**  
Team Leader  
Ryan Thapar  
5014012  
(647) 691-8644  
REALTOR®  
The Thapar Team  
(416) 562-5656

[Ask a question](#)

## Ylopo Notifications to Agent

YLOPO URGENT PRIORITY LEAD: Miski Abdala requested an in-person tour of 3615 Zinnia Lane N, Plymouth, MN



notification@ylopo.com  
to me

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 Store](#)

Recommended Actions:

1. Call the lead at (763) 300-9297 and ask them when they are normally free to look at 3615 Zinnia Lane N, Plymouth, MN
2. Ask them if they know where 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](#) if you have any questions!

# Ylopo + CRM: Activity

The screenshot displays the Ylopo + CRM interface, highlighting the integration of lead activity tracking and AI-powered text generation.

**Left Panel (Lead Profile):** Shows a lead named "Vanessa" with a recent communication timestamp of "Last Communication 18 hours ago". Below the profile are contact icons for phone, email, and home. A "Background" section is present, with a "Add background" button.

**Middle Panel (Activity Log):** A "Lead Activity" section is highlighted with a green arrow pointing to the "Create Note" button. Below this, a list of activity items is shown, with one item highlighted and a green arrow pointing to its "via: Ylopo Adwords" tag. The activity log includes a timestamp of "Sep 17" and a location "17200 Newhope Street 123, Fountain Valley, CA 92708 - view map".

**Right Panel (Summary and AI):** A summary box on the right shows "465K" leads, "572sf" in square feet, and "92708" as the zip code. It includes a "View on Ylopo Adwords" button. Below this are sections for "Tasks" (No upcoming tasks) and "Appointments" (No upcoming appointments). The "Ylopo AI" section indicates "YLOPO AI TEXT" is paused, with a "Resume" button and a note that "Drip and behavioral texts are enabled".

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

# Ylopo + CRM: Activity

## Ad Engagement

The screenshot shows a lead profile for "The Fenderer Group - EXP Realty" with a lead score of 85. The lead is interested in buying a home in Orange County, CA, with a budget of \$300,000-\$400,000. The lead has viewed 10 properties and has a 90% chance of closing. The lead's activity history is shown, including a recent registration from the Ylopo page on April 13, 2025, and a lead ID of 18798849.

## AI Text

The screenshot shows a Ralya Conversation between Lauren Chifo and Matt Croteau. Lauren initiates the conversation with "Let me know". Matt responds with "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 bath/bath requirement? Also, we can end these messages anytime." The lead ID is 18798849.

## AI Voice

The screenshot shows a call log entry for Matt Croteau from Lauren Chifo on April 10, 2025. The call was an outbound call with a disposition of "No Answer". The lead ID is 18798849.

## Home Search Site Activity

The screenshot shows a lead profile for "Ylopo" on a real estate search site. The lead has viewed 1 listing and has a recent activity of "Recent Activity" on April 10, 2025. The lead's AVM report shows estimated home values for 2019 Hillside Drive, Orange, CA 92869, with a current value of \$2,700,000 and a recent change of \$2.3M.

## Seller Report & Listing Alerts

The screenshot shows a seller report for "Ylopo" on April 10, 2025. It includes AVM reports for 2019 Hillside Drive, Orange, CA 92869, with a current value of \$2,656,800 and a recent change of \$2.3M. The report also shows a recent activity of "Recent Activity" on April 10, 2025, and a "Ylopo Links & Activity" section with a user action of "Lead Registered and viewed 1 listings".

Ylopo

# Ylopo + CRM: Tags

The screenshot displays the Ylopo CRM interface. On the left, a lead profile for 'Vanessa' is shown with a 'Tags' section highlighted by a green box and a green arrow pointing to it. The 'Tags' section lists various tags such as 'Tags 92708', 'appinvite', 'BUYER', 'do\_you\_own\_a\_home>No', 'DYNAMIC\_REG\_ADDRESS', 'Fountain Valley', 'GHOST\_CALL', 'Lead-Day15-Audit', 'PPC\_GEO', 'preapproved\_for\_loan>No', 'sell\_before\_buy>No', 'timeline=within 90 days', 'VOICEMAIL', 'YLOPO\_ADWORDS', and 'YLOPO\_AI\_VOICE'. The main dashboard shows communication history with Matt Croteau, including an email from 9:09 am via action plan and a call from Sep 22. The right side of the interface includes sections for 'Activity', 'Tasks', 'Appointments', and 'Ylopo AI'.

**Ylopo 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



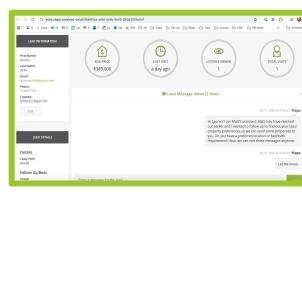
The Fernandez Group - EXP Realty  
This La Habra property just sold in your area! Contact me if you hope to sell in the next 6-12 months as I have people actively looking for a home in your area. Below is a short description of this property we sold for \$349,000.

Welcome to 600 Juarita St a beautifully maintained 3-bedroom, 2-bathroom home in a peaceful neighborhood. This property offers a comfortable layout with a large living room, perfect for anyone looking to enjoy a serene living environment. The home... See more

1262 SqFt

Tags: 6\_TO\_12\_MONTHS, 73\_BELL\_CANYON\_DRIVE, BUYER, FINANCING\_REQUIRED, leadverify\_email\_valid\_yes, LISTING\_ROCKET, LUXURY\_BUYER, NEW\_LISTING, RANCHO\_SANTA\_MARGARITA\_CA, VOICEMAIL, YLOPO\_AL\_VOICE, YLOPO\_FACEBOOK

## AI Text



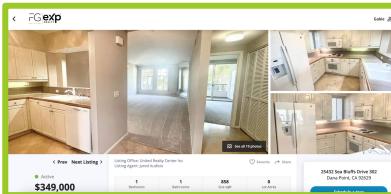
Tags: 92646, 92701, 92703, 92704, 92705, 92706, 92707, AI\_ENGAGED, Huntington Beach, LM\_CASUALLY\_BROWSING\_RIGHT\_NOW, NEXT\_YEAR\_OR\_MORE, North Tustin, open\_house, PriorityAlert, RETURNED, Santa Ana, Y\_HOME\_3\_VIEW, YPRIORITY

## AI Voice



Tags: 92708, BUYER, CALLBACK\_SCHEDULED, do\_you\_own\_a\_home=No, DYNAMIC\_REG\_ADDRESS, Fountain Valley, GHOST\_CALL, leadverify\_email\_valid\_yes, PPC\_GEO, preapproved\_for\_loan=No, RETURNED, sell\_before\_buy=No, timeline=within 90 days, YLOPO\_ADWORD, YLOPO\_AL\_VOICE, YLOPO\_AL\_VOICE\_COMPLETED

## Home Search Site Activity



Tags: #Send-to-Priority-Pond, #Seller\_CMA, 90805, 91321, 92503, 92507, 92509, 92805, carealive, dayonecampaign, GetCashOffer, Jurupa Valley, leadverify\_email\_valid\_yes, Long Beach, Newhall, NOTEXT, PriorityAlert, RETURNED, Riverside, SELLER, SellerLeadCheck, Y\_HOME\_3\_VIEW, YLOPO\_ADWORD, YPRIORITY

## Seller Report & Listing Alerts



Your Estimated Home Values  
20169 Heidle Drive, Orange, CA 92869

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

Tags: 92563, 92584, 92585, 92586, HANDRAISER, LM\_CASUALLY\_BROWSING\_RIGHT\_NOW, Menifee, Murrieta, open\_house, PriorityAlert, PriorityHandraiser, RETURNED, Y\_ADDRESS\_FOUND, Y\_HOME\_3\_VIEW, Y\_SELLER\_REPORT\_ENGAGED, Y\_SELLER\_REPORT\_VIEWED, Y\_SELLER\_TUNED\_HOME\_VALUE, YPRIORITY

# Ylopo + CRM: Integration Review



AI blocked or allowed

Ylopo + CRM Integration Review

Stage

Background

Details

Stage Lead

Source: Ylopo Adwords, 2 days ago

Agent: Matt Croteau

Lender: Price \$465,000

Tags: 92708, do\_you\_own\_a\_homeNo, DYNAMIC\_BIG\_ADDRESS, prepossess\_for\_leaseNo, do\_beef\_beef, do\_beef\_beef

YLOPO AI TEXT: Ylopo AI is paused

YLOPO AI VOICE: Ylopo AI voice is calling lead

YLOPO AI IMAGE: Last Call 09/12/2024

Outcomes: Visual

Custom Fields

IMPORTANT: Ylopo Starts Live: https://tradingylopo.com/lead/start/329v9h...

Ylopo + CRM Integration Review

Lead Activity

Vanessa

Last Communication 18 hours ago

Source: Ylopo Adwords, 2 days ago

Agent: Matt Croteau

Lender: Price \$465,000

Tags: 92708, do\_beef\_beef, DYNAMIC\_BIG\_ADDRESS, do\_beef\_beef, do\_beef\_beef

YLOPO AI TEXT: Ylopo AI is paused

YLOPO AI VOICE: Ylopo AI voice is calling lead

YLOPO AI IMAGE: Last Call 09/12/2024

Outcomes: Visual

Custom Fields

IMPORTANT: Ylopo Starts Live: https://tradingylopo.com/lead/start/329v9h...



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

Ylopo + CRM Integration Review

Assigned Agent

Vanessa

Last Communication 5 days ago

Source: Ylopo Adwords, 6 days ago

Agent: Matt Croteau

Lender: Price \$465,000

Tags: 92708, do\_beef\_beef, DYNAMIC\_BIG\_ADDRESS, do\_beef\_beef, do\_beef\_beef

YLOPO AI TEXT: Ylopo AI is paused

YLOPO AI VOICE: Ylopo AI voice is calling lead

YLOPO AI IMAGE: Last Call 09/12/2024

Outcomes: Visual

Custom Fields

IMPORTANT: Ylopo Starts Live: https://tradingylopo.com/lead/start/329v9h...

Ylopo + CRM Integration Review

Tags

Vanessa

Last Communication a day ago

Source: Ylopo Adwords, 6 days ago

Agent: Matt Croteau

Lender: Price \$465,000

Tags: 92708, do\_beef\_beef, DYNAMIC\_BIG\_ADDRESS, do\_beef\_beef, do\_beef\_beef

YLOPO AI TEXT: Ylopo AI is paused

YLOPO AI VOICE: Ylopo AI voice is calling lead

YLOPO AI IMAGE: Last Call 09/12/2024

Outcomes: Visual

Custom Fields

IMPORTANT: Ylopo Starts Live: https://tradingylopo.com/lead/start/329v9h...



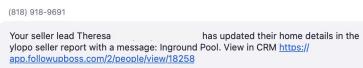
Lead sources, registration responses, engagement with Ylopo sites, AI and tools

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

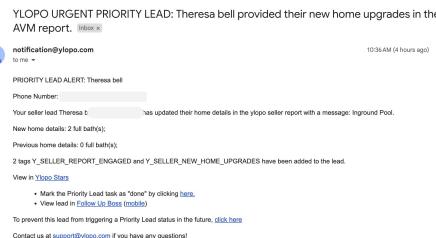
# Ylopo Notifications: Priority Notifications

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!

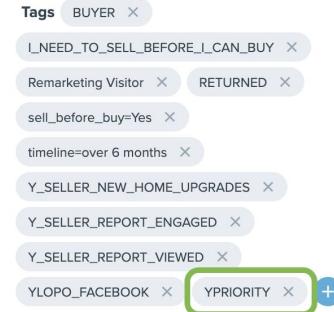
## Priority Text sent to agent



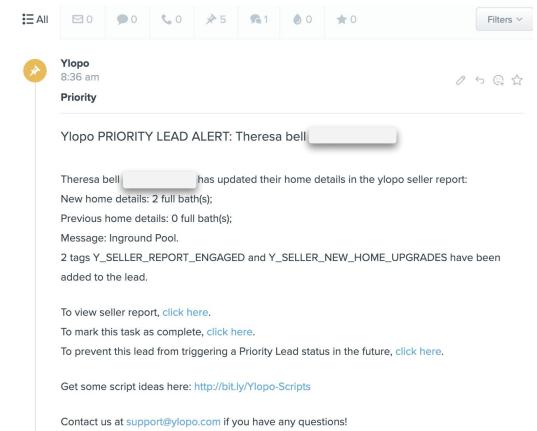
## Priority Email sent to agent



## Y\_PRIORITY tag added on lead profile



## Priority notes added to lead profile in CRM



# 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  
[agentleads@ylopo.com](mailto:agentleads@ylopo.com)  
Brenda Wheaton  
We sent Brenda Wheaton "Hi, Brenda! This is Local Home Team's assistant an Ylopo. If you prefer I do not text you just reply back. I had a note you were searching online in your search area. Have you done in or any neighborhoods or school zones you'll like to move to one day?" on 8/10/24.  
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. - 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>

## AI Text Tag added to CRM profile

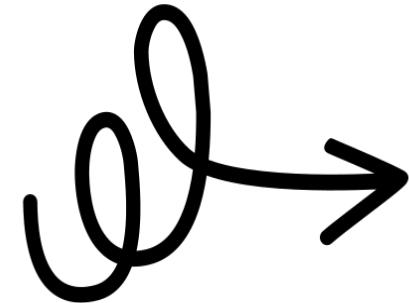
Tags AI\_ENGAGED BUYER  
cash\_offer=no  
do\_you\_own\_a\_home=Yes  
I\_NEED\_TO\_SELL\_BEFORE\_I\_CAN\_BUY

## 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**

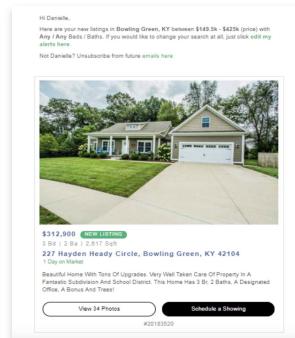
## Prep:

- ❑ 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



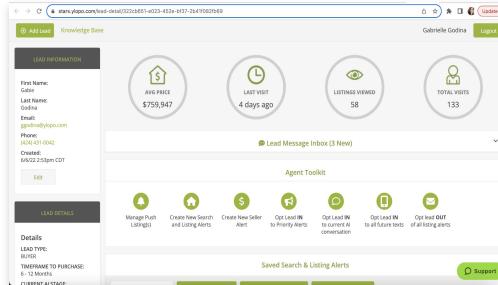
Optional Listing Alert

# Seller Leads Import

**Best for targeting sellers/home owners**

## Prep:

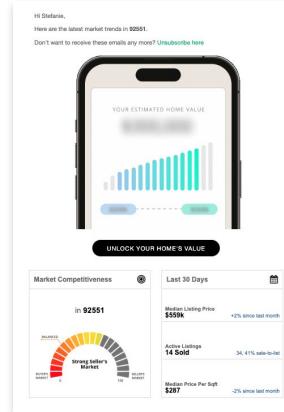
- ❑ Import leads into CRM, email must be present
- ❑ Ensure lead/client addresses are present
- ❑ Only import seller leads that are either past clients or generated seller leads
- ❑ Your Implementation Specialist will provide you further instructions



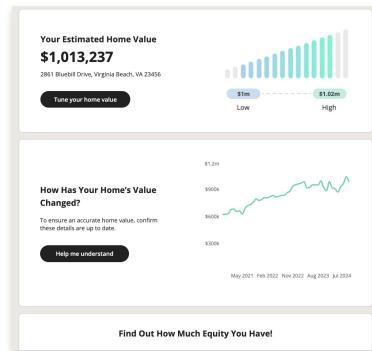
Import into Stars



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 Stars Import
- ❑ Register and 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

