

# 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](https://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

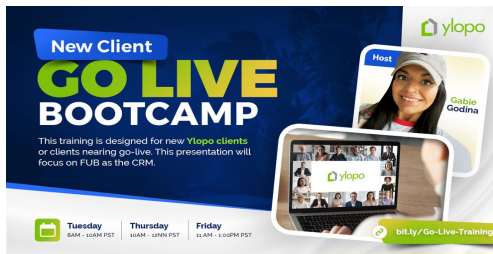


Ylopo & Lofty (formerly Chime)

## Live Training



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



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

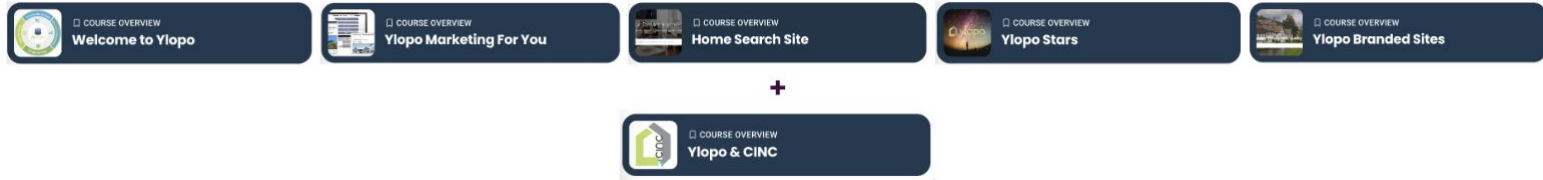


✓ **Onboarding:**  
Additional tools and systems  
training for lead conversion



# 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
- ✓ 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

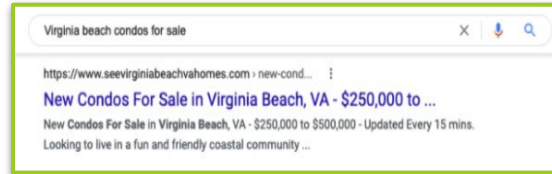
**Please attend these meeting for optimal account set up!**



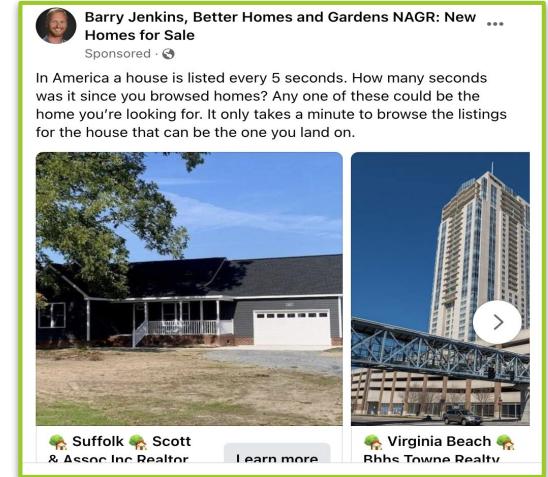
# Marketing: Your Ylopo ads are live!



**Social Marketing**



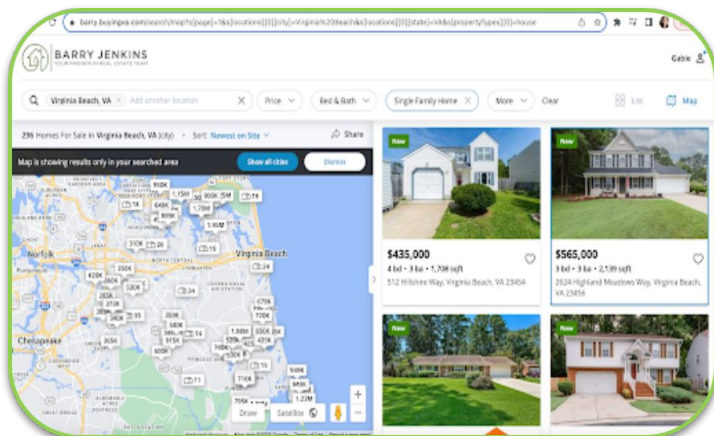
**Google PPC**



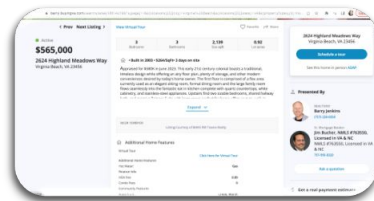
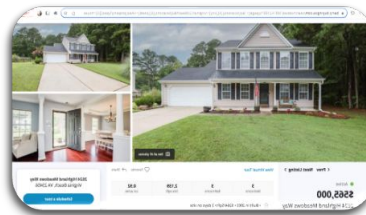
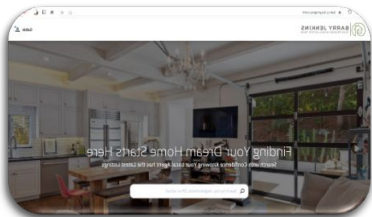
**Remarketing**

**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 image displays a web application interface for Ylopo Stars integration. On the left, a sidebar shows a contact profile for Vanessa, including her phone number (714) 893-7373, email scentme12@gmail.com, and a link to her Stars profile. A green callout box labeled "Link to Stars Profile" points to this link. The main content area shows the Stars lead detail page for Vanessa, with fields for First Name, Last Name, Email, Phone, and Created date. Below this, there are four circular metrics: AVG PRICE, LAST VISIT (2 days ago), LISTINGS VIEWED (0), and TOTAL VISITS (1). The page also features 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". A "Live Chat" button is visible in the bottom right corner.

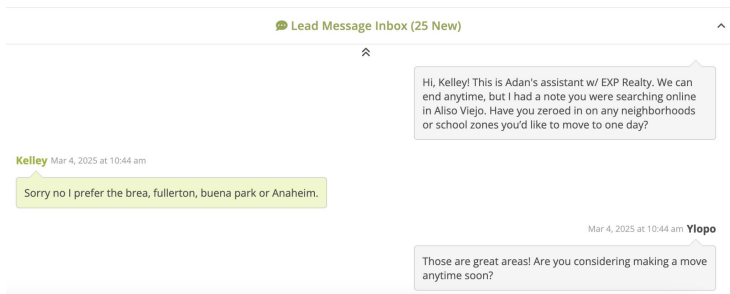
**All Users: Utilize Stars to keep leads engaged on your new home search site with listing alerts, manage your AI texting, send AVM report, use the bad number tool and MORE!**



# AI Text & AI Voice: Assistants begin outreach

## ❏ AI texting outreach to new leads, manage in Stars

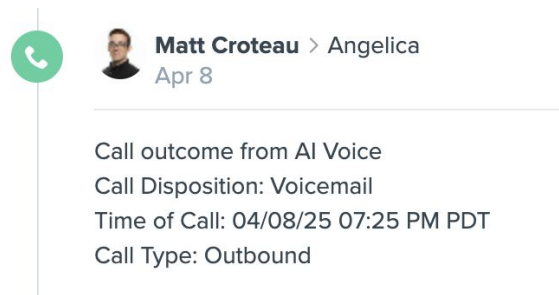
- Stars Online Course, Boot Camp will train on AI texting



AI text outreach begins, manage in Stars

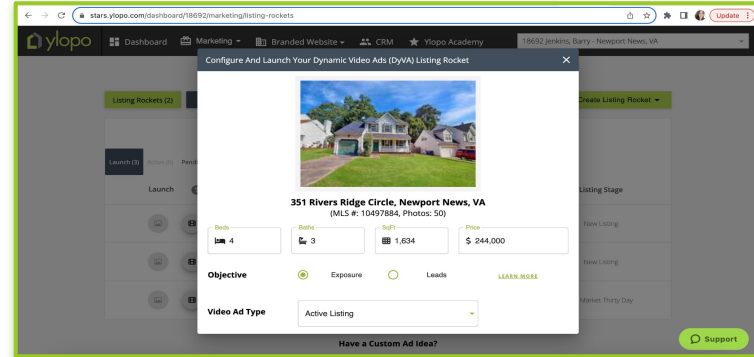
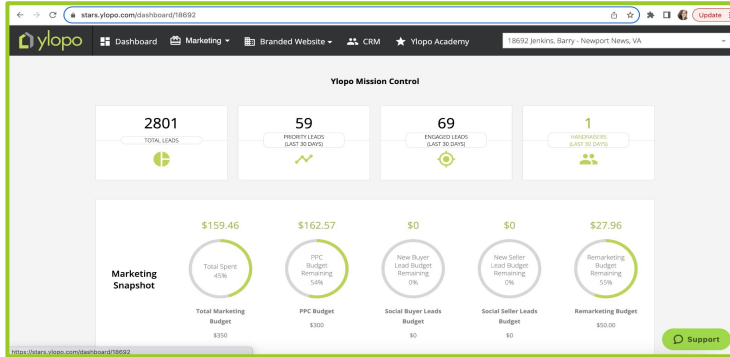
## ❏ (Optional) AI voice begins calling eligible leads, manage voice through FUB

- 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, 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



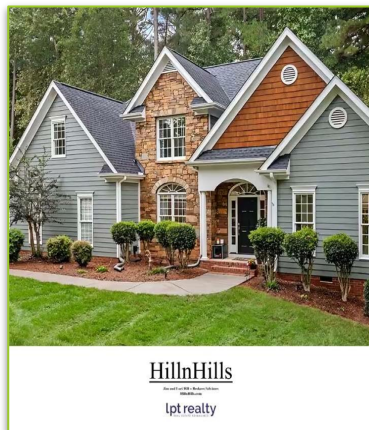
HOST

**Jim Hill**  
Ylopo Coach

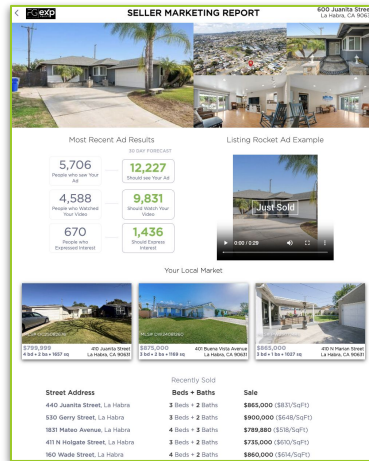


HOST

**Marissa Canario**  
Ylopo Coach



**HillnHills**  
Real Estate  
lpt realty



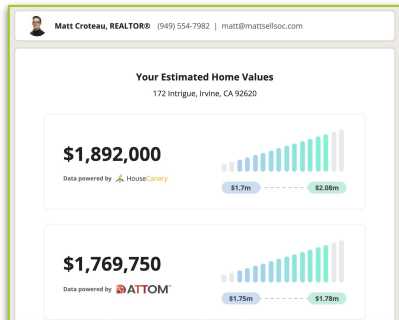
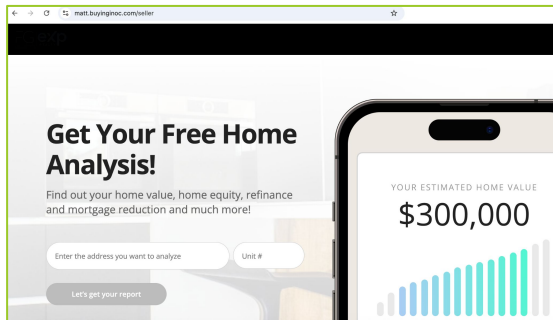
## ASSIGNED COLLECTIONS

### 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





# 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](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](https://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

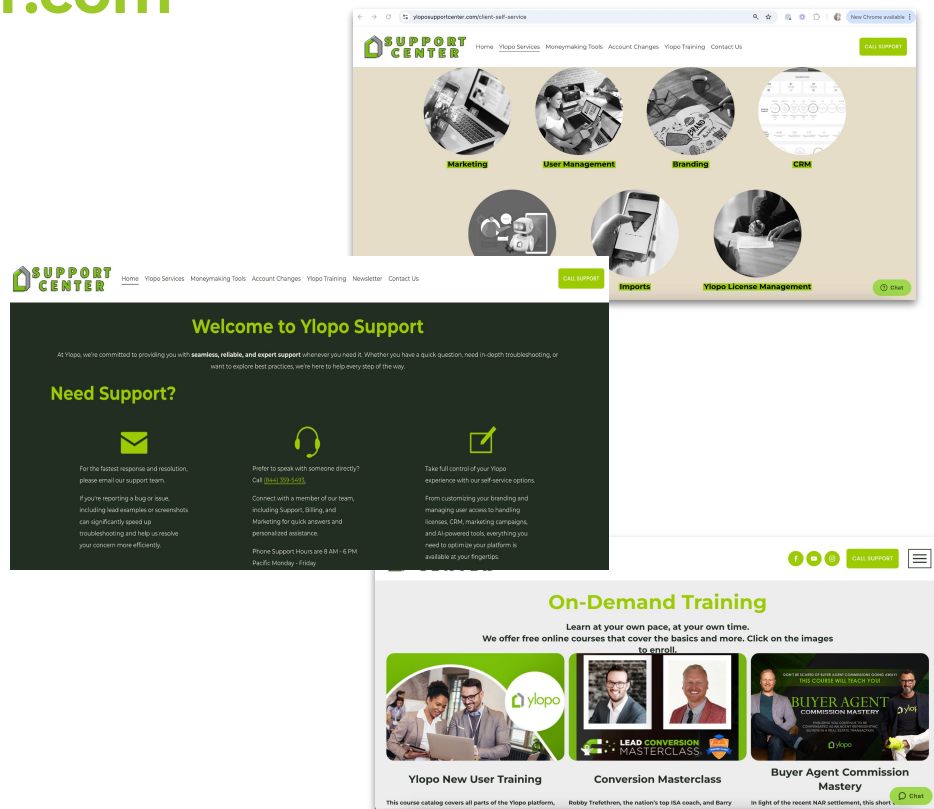
Looking to take your business to the next level? Schedule time with a Ylopo Growth Advisor for a high-level strategy session focused on maximizing your results, identifying new opportunities, and making the most of your Ylopo investment.

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

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

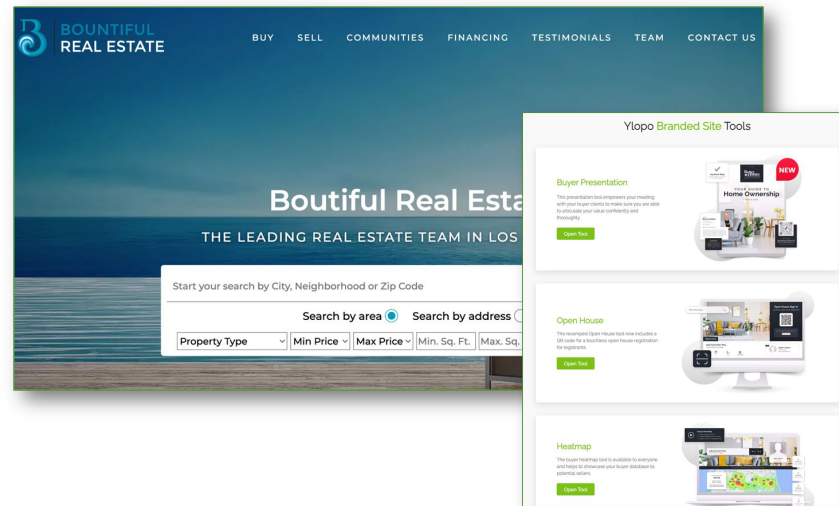
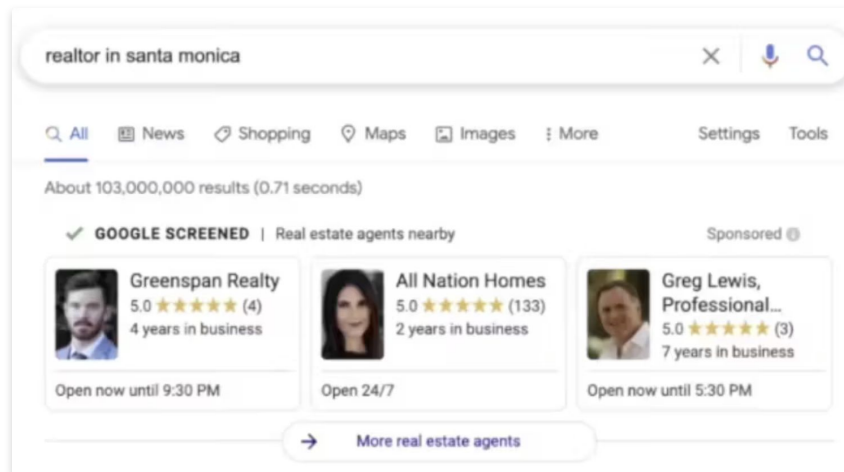
# Utilize YlopoSupportCenter.com

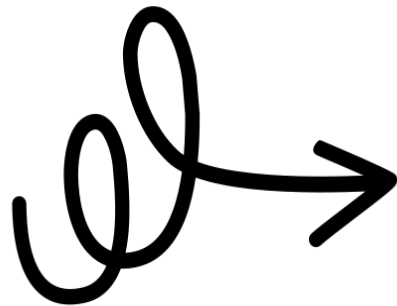
- **Get Support**
  - Ylopo Product Support Help
  - Book a Coaching Call
- **Self Service**
  - Add/remove Ylopo users
  - Update Ylopo services
  - Account Changes
  - Mass Lead imports
- **Training Guides and Resources**
  - Sign up for Ylopo Training
  - Access Recordings
  - Best Practices
- **&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





# Not Live: LSA, GBP & Branded Site





# 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



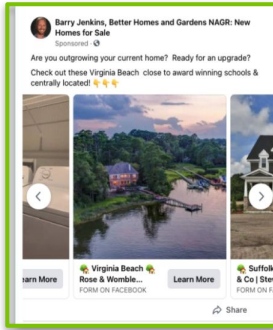
- ❑ Leads are delivered, routed
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- ❑ Database nurtured by campaigns
- ❑ Reporting to track deals
- ❑ Automations for campaigns and repetitive activity
- ❑ CRM Training

**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

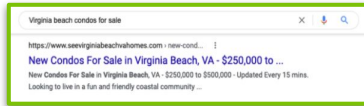
## Facebook Social Ads



Lead

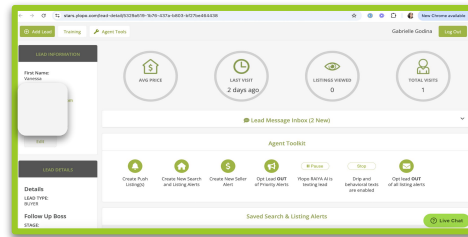
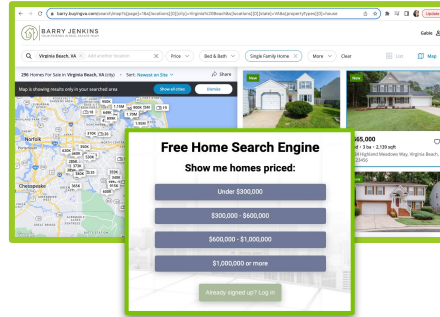


or

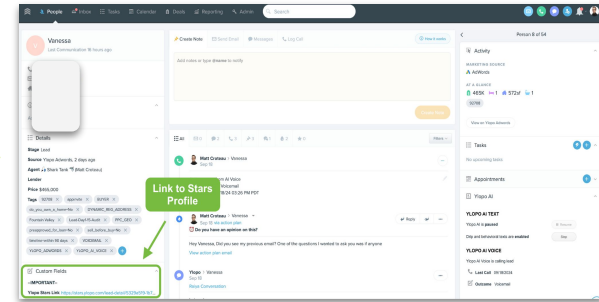


## Google PPC Ads

## Home Search Site Registration & Profile creation



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



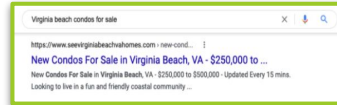
# CRM + Ylopo (Stars): Sources

**Ylopo  
Lead  
Source:**

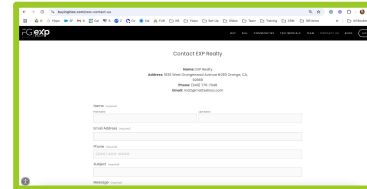
**Home Search Site:  
Facebook/Social**



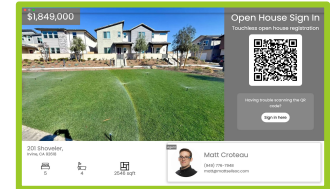
**Home Search  
Site:  
Google Ads/PPC**



**Branded Site,  
Branded Sites  
Tools Page Tools**



**Branded Site:  
Open House Tool**



**Ylopo  
Source  
Name  
in FUB:**

- Ylopo Buyers
- Ylopo Sellers
- Direct Connect FB

- Ylopo Adwords, Ylopo LSA
- Direct Connect PPC

- 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**

<b>Ylopo Seller</b> • Sellers • Ge Juefeng (API) Last lead • <a href="#">Ken Mackey</a> • 15 hours ago • 1,962 leads <a href="#">Advanced Settings</a> • (4) <a href="#">Archive</a>				<a href="#">View Advanced Rules (4)</a>
<b>Ylopo</b> • Buyers • Ge Juefeng (API) Last lead • <a href="#">Julie TagPonds</a> • 18 hours ago • 11,489 leads <a href="#">Advanced Settings</a> <a href="#">Archive</a>	Distribution Ylopo AI-Ylopo Call Cen...	Lender No assigned lender	Action Plan No action plan	
<b>Branded Website</b> • Buyers • Ge Juefeng (API) Last lead • <a href="#">Jackson Core</a> • 3 days ago • 2,283 leads <a href="#">Advanced Settings</a> <a href="#">Archive</a>	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 image displays two overlapping screenshots. The background screenshot shows the Ylopo CRM interface with a lead profile for 'Vanessa'. The profile details include: Stage Lead, Source Ylopo Adwords, 2 days ago, Agent Sharik Tank (Matt Croteau), Lender, Price \$465,000, and various tags like '92708', 'approximate', 'BUYER', 'Fountain Valley', 'Lead Day15-Audit', 'PPC\_GEO', 'preapproved\_for\_loan-No', 'set\_before\_buy-No', 'lifetime-within 90 days', 'VOICEMAIL', 'YLOPO\_ADWORDS', and 'YLOPO\_AL\_VOICE'. A green box highlights the 'Custom Fields' section, which includes an 'IMPORTANT-' field and a 'Ylopo Stars Link' with the URL 'https://stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438'. A green arrow points from this link to the foreground screenshot.

The foreground screenshot shows the 'stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438' page. It features a 'LEAD INFORMATION' sidebar with fields for First Name (Vanessa), Last Name, Email, and Created (9/17/24 5:11pm CDT). The main content area includes four circular metrics: AVG PRICE, LAST VISIT (2 days ago), LISTINGS VIEWED (0), and TOTAL VISITS (1). Below these are sections for 'Lead Message Inbox (2 New)', 'Agent Toolkit' (with options 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'), and 'Saved Search & Listing Alerts'. 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

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.

**Lead Profile: Vanessa**

- Last Communication 16 hours ago
- Background: Add background
- Details:
  - 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...>

**Communications:**

- Call outcome from AI Voice**  
Call Disposition: Voicemail  
Time of Call: 09/18/24 03:26 PM PDT
- Matt Croteau > Vanessa**  
Sep 18  
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
- Ylopo > Vanessa**  
Sep 18  
Ralya Conversation

**Right Sidebar:**

- Activity: MARKETING SOURCE AdWords, AT A GLANCE 465K, 1, 572sf, 1, 92708
- Tasks: No upcoming tasks
- Appointments
- Ylopo AI: YLOPO AI TEXT (Ylopo AI is paused), YLOPO AI VOICE (Ylopo AI Voice is calling lead)

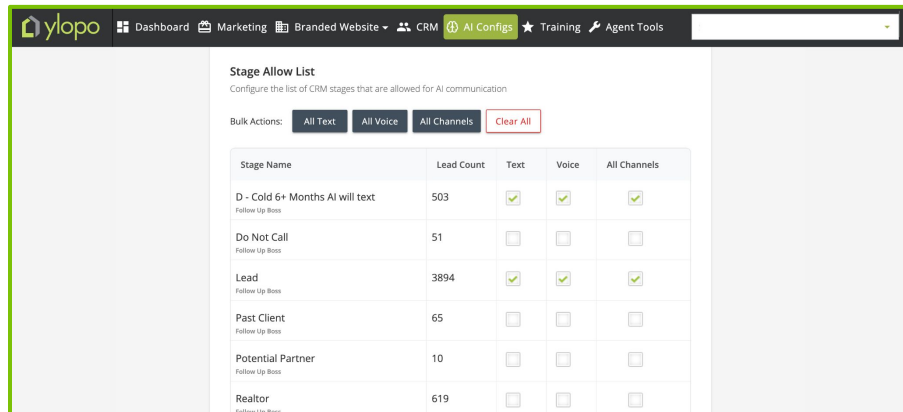
*Stage/Status/Pipeline: AI blocked or allowed*

# Ylopo + CRM: Stage

AI

## Recommended blocked stages

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



**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 <small>Follow Up Box</small>	503	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Do Not Call <small>Follow Up Box</small>	51	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead <small>Follow Up Box</small>	3894	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Past Client <small>Follow Up Box</small>	65	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Potential Partner <small>Follow Up Box</small>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Realtor <small>Follow Up Box</small>	619	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

# 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 content area is divided into three columns. The left column shows the contact profile for Vanessa, including a profile picture, name, last communication date, and various details like Source (Ylopo Adwords), Agent (Me), Lender, Price (\$465,000), and Timeframe. The middle column shows a call log entry for Matt Croteau, dated Nov 2, with details about the call outcome and disposition. The right column shows a sidebar with sections for Activity, Tasks, Appointments, and Ylopo AI. A green box highlights the 'Agent Me' field in the details section, and a green arrow points to it from a label 'Assigned Agent'.

**Assigned Agent**

**Vanessa**  
Last Communication 5 days ago

**Details**

**Stage** Lead

**Source** Ylopo Adwords, 2 months ago

**Agent** Me

**Lender**

**Price** \$465,000

**Timeframe**

**Tags** 92708 x appinvite x BUYER x

**Call Log**

**Matt Croteau** > Vanessa  
Nov 2

Call outcome from AI Voice  
Call Disposition: Voicemail  
Time of Call: 11/02/24 09:14 AM PDT

**Activity**

**MARKETING SOURCE**  
AdWords

**AT A GLANCE**  
459K 1 572sf 1  
92708

**Tasks**  
No upcoming tasks

**Appointments**  
No upcoming appointments

**Ylopo AI**  
YLOPO AI TEXT

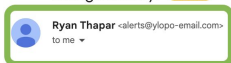
Ylopo Listing and Seller Alerts, Presented by section on Home Search Site



# 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

A screenshot of the Ylopo Agent Home Search Site. The page displays a listing for 85 Wood Street Th5, Toronto C08, ON M4Y 0E8, priced at \$1,395,000. The listing includes details about the property, such as 4 bedrooms, 3 bathrooms, and a lot size of 0. It also features a 'Schedule a tour' button and a section for the presenting agent, Ryan Thapar, with his contact information and a 'Presented By' badge. The page is titled 'Listing Courtesy of HARVEY KALLES REAL ESTATE LTD.' and includes a 'Next Listing' button.

## 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  
to me

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](mailto: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 activity feed and a summary card on the right.

**Lead Activity**

**Activity**

**MARKETING SOURCE**

AdWords

**AT A GLANCE**

465K 1 572sf 1

92708

[View on Ylopo Adwords](#)

**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

**YLOPO AI TEXT**

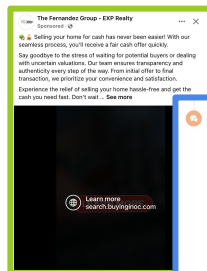
Ylopo AI is **paused**

Drip and behavioral texts are **enabled**

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

# Ylopo + CRM: Activity

## Ad Engagement



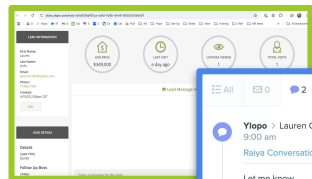
The Fernandez Group - EXP Realty  
Sponsored

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  
...HJNBdyMymNVYIEBqU5Sw57zSU91\_Kse8GTTnwIOBxCiQ0  
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

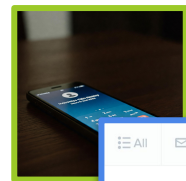
## AI Text



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

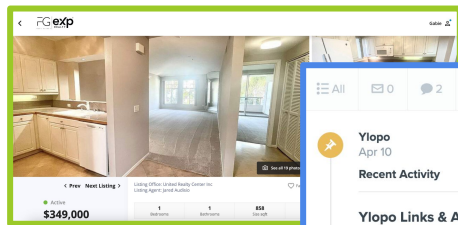
Ylopo > Lauren Chifo  
8:25 am  
Raiya Conversation  
Hi Lauren! I am Matt's assistant. Matt may have reached out earlier and I wanted to follow up to find out your ideal property preferences so we can send some properties to you. Do you have a preferred location or bed/bath requirement? Also, we can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

## AI Voice



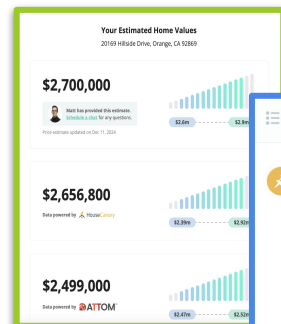
Matt Croteau > Lauren Chifo  
Apr 10  
Call Outcome from AI Voice  
Call Disposition: No Answer  
Time of Call: 04/10/25 12:34 PM PDT  
Call Type: Outbound

## 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  
Data powered by Zillow, Zillow, Zillow

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>

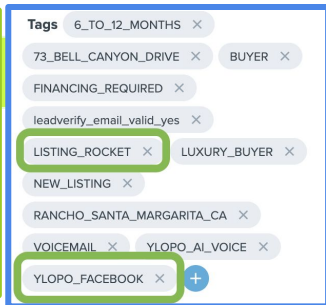
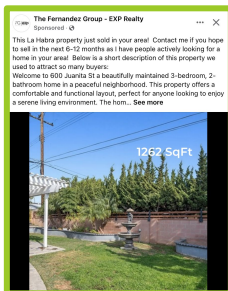
# Ylopo + CRM: Tags

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 with details such as Stage (Lead), Source (Ylopo Adwords), Agent (Shark Tank), and Lender. A green box highlights the 'Tags' section, which lists various lead attributes: 92708, appinville, 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. A green arrow points from the 'Tags' label to this section. The main area shows a conversation history with Matt Croteau, including a message about a dropped ball and a follow-up about email responses. The right sidebar contains sections for Activity (Marketing Source: AdWords), Tasks (No upcoming tasks), Appointments, and Ylopo AI (Ylopo AI TEXT and Ylopo AI VOICE).

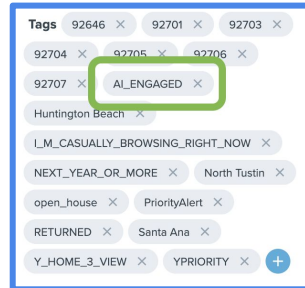
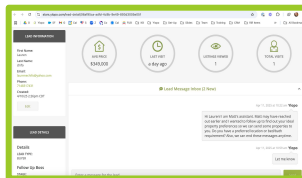
**Ylopo Tags** will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database, route leads, create automations - IMPROVE YOUR CRM WORKFLOW

# Ylopo + CRM: Tags examples

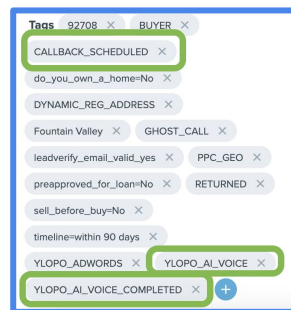
## Ad Engagement



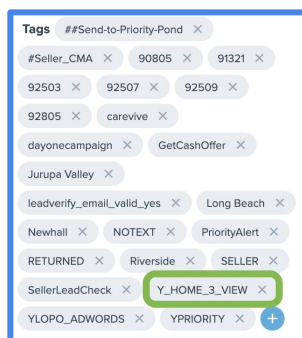
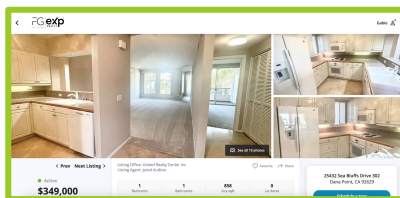
## AI Text



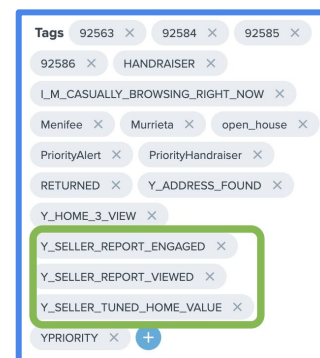
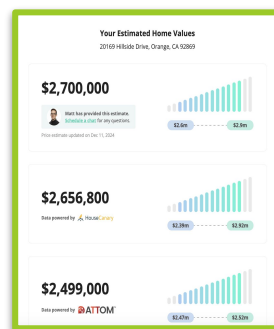
## AI Voice



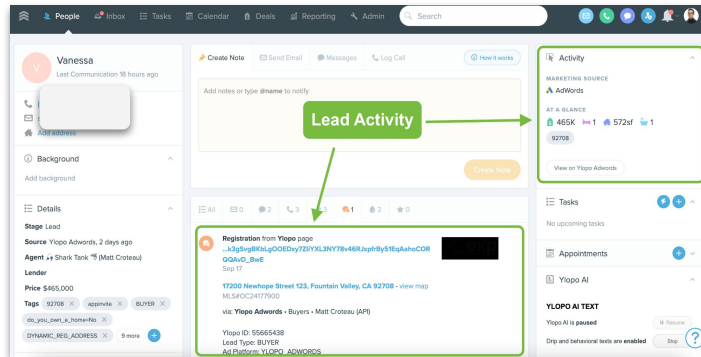
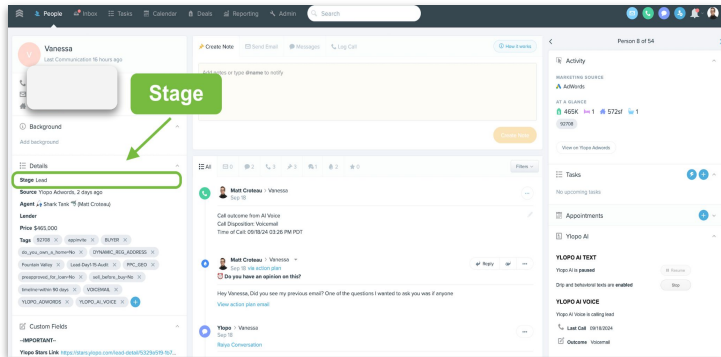
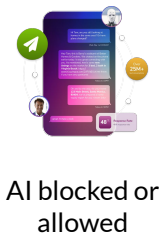
## Home Search Site Activity



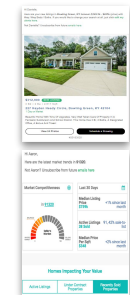
## Seller Report & Listing Alerts



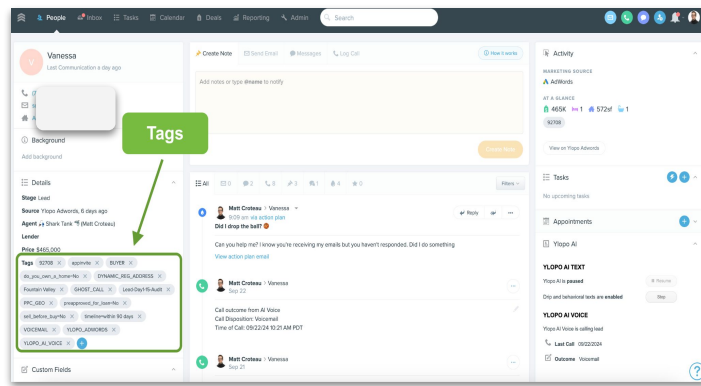
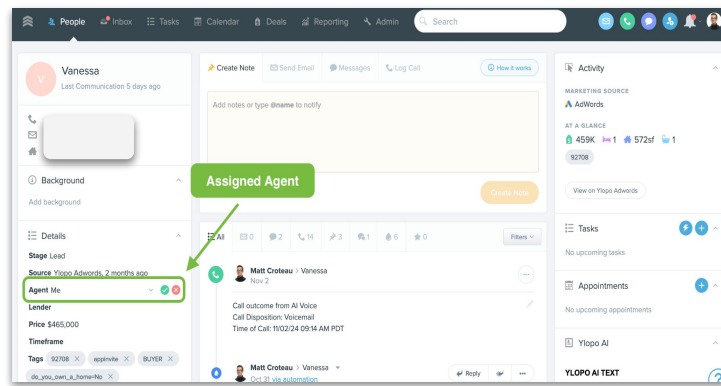
# Ylopo + CRM: Integration Review



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](mailto: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](#) ([track](#))

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

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](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

notification@ylopo.com  
to: you

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 moved or are you neighborhood in about same and then 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."  
View lead in [LeadStack](#)  
View in [Ylopo Sites](#)

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

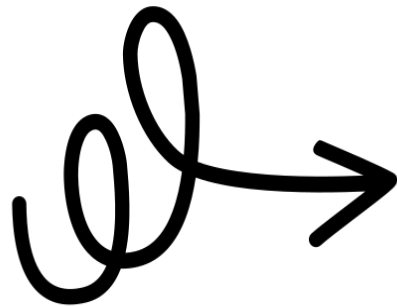
I\_NEED\_TO\_SELL\_BEFORE\_I\_CAN\_BUY X

## 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 .



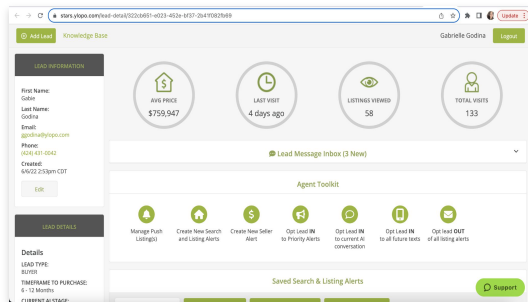
# Mass Lead Import



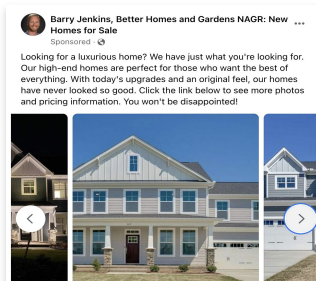
**Best for importing large buyer and remarketing only contacts into Stars**

## Prep:

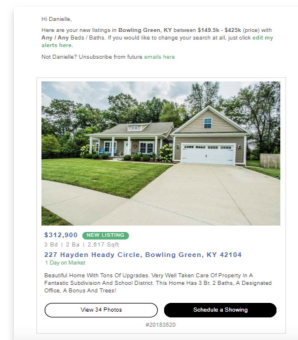
- ❑ Import leads into CRM, email must be present
- ❑ Export saved searches to be used for existing e-alerts
- ❑ Your Implementation Specialist will provide you further instructions



Import into Stars



Remarketing



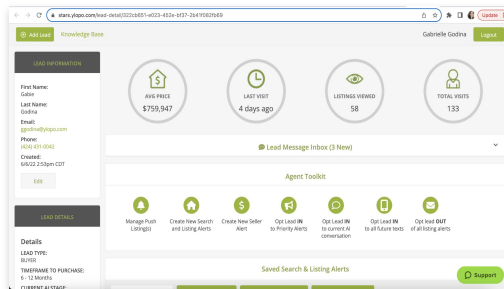
Optional Listing Alert

# Seller Leads Import

**Best for targeting sellers/home owners**

## Prep:

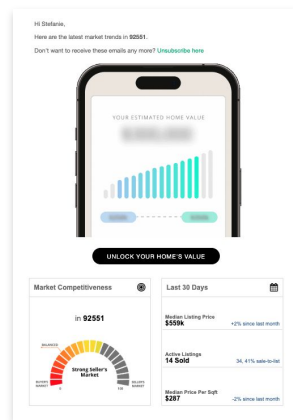
- ❑ Import leads into CRM, email must be present
- ❑ Ensure lead/client addresses are present
- ❑ Only import seller leads that are either past clients or generated seller leads
- ❑ Your Implementation Specialist will provide you further instructions



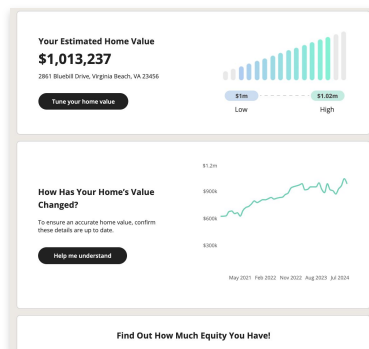
Import into Stars

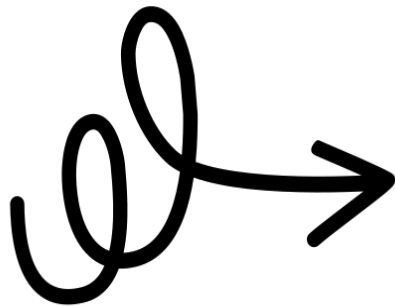


Remarketing



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 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

