

surefire

Database Uploads

Gather and Organize Your Data

Top of Mind Critical Database Fields

Required	Highly Important	Optional	Just Added
Loan Officer	Lien Number(1 or 2)	Co-Borrower First Name	Website
Borrower First Name	Loan Occupancy	Co-Borrower Last Name	Secondary Contact Type
Borrower Last Name	Loan Purpose(Purchase, Refi)	Borrower DOB	Contact Source
Mailing Address	Loan Type(Conventional, FHA)	Co-Borrower DOB	Contact Company Title
Mailing Address City	Loan Term(months)	Borrower Gender	Notes
Mailing Address State	Fixed Or Adjustable	Co-Borrower Gender	
Mailing Address Zip	Loan Amount	Borrower Email	
Email Address	Property Value	Borrower Home Phone	
	Loan Rate	Borrower Alternate Phone	
	Loan Program	Co-Borrower Email	
	Closing Date	Co-Borrower Home Phone	
	Subject Property Address	Co-Borrower Alternate Phone	
	Subject Property City		
	Subject Property State		
	Subject Property Zip Code		
	Purchase Only		
	Agent First Name		
	Agent Last Name		
	Agent Company		
	Agent Address		
	Agent City		
	Agent State		
	Agent Zip		
	Agent Phone		
	Agent Cell		
	Agent Email		

Legend

- Required
- Highly Important, we can send mail without these but cannot do much else
- Optional, only important if you want to get the most out of our system.
- Just added and really nice to have
- Optional, but Required for Co-Branding

So you can get the most out of Surefire, take your time preparing for your database upload.

The list is color coded for required, highly important, optional and just added (and really nice to have) fields. You can download the list http://wp.eeoo.co/Top_of_Mind_Critical_Database_Fields_2_2_.xlsx The green section is required for co-branding purposes.

You can load data for multiple LOs in one spreadsheet.

A	B	C	D	E	F	G	H
Loan Officer	First Name	Last Name	Co-First Name	Co-Last Name	Nickname	"Co-Nickname	Phone
	Johnathan	Thomas	Mary Ann	Thomas	John	Mary	828-989-6646

Load your contacts into an Excel or CSV file. You can download an Excel file with all fields included <http://wp.eeoo.co/Contacts.xlsx>

Top of Mind will upload up to 2000 contacts and up to 50 Referral Partner contacts for you. You may manually load as many as you'd like.

M	N	O	P	Q	R
Co-Email	Website	Co-Website	Birthday	Co-Birthday	Contact Type
mary15@hotmail.com			10/12/1979	4/15/1982	Prospect

Clients
 Prospects
 Referral Sources
 Business Contacts
 Personal/Family
 Do Not Contact

Contact Types are important for segmenting your database. Available contact types are Clients, Prospects, Referral Sources, Business Contacts, Personal/Family and Do Not Contact.

M	N	O	P	Q	R	S
Co-Email	Website	Co-Website	Birthday	Co-Birthday	Contact Type	Secondary Contact Type
il.com mary15@hotmail.com			10/12/1979	4/15/1982	Prospect	Refinance

Must Match
 Secondary
 Contact Type
 in Surefire to be
 uploaded properly

Secondary Contact Types are important for further segmenting your database. For example, you may want to divide Referral Sources into real estate agents, financial planners and CPAs.

Secondary Contact Types vary by company. Be sure to familiarize yourself with the secondary contact types available to you. **The type entered on your spreadsheet must match the type in Surefire exactly.** For example, *Realtor* will not load correctly if the Surefire name is *Real Estate Agent*.

T	U	V
Contact Source	Mailing Address1	Mailing Address2
Vanessa Flether	110 Eagle Ridge Dr	

In the **Contact Source** field, list where you got the lead—maybe an advertisement or a referral.

	T	U	V
pe	Contact Source	Mailing Address1	Mailing Address2
	Vanessa Fletcher	110 Eagle Ridge Dr	

Ensure that the **Mailing Address** is correct. Limit P.O. Boxes and try to use street addresses.

	AF	AG	AH	AI	AJ
e	Closing Date	Loan Type	Lien Number	Loan Purpose	Occupancy
	3/13/2010	FHA	1	purchase	primary

If the contact has a loan, enter all of the information, including **Closing Date, Loan Type, Lien Number, Loan Purpose** and **Occupancy**.

	AQ	AR	AS	AT	AU	AV
	Loan Status	Loan Product	Loan Rate	Loan Amount	Appraised Value	Loan Term
	closed	30 yr fixed	4.6	200,000	225,000	360

Continue with **Loan Status, Loan Product, Loan Rate, Loan Amount, Appraised Value** and **Loan Term**.

	AW
	Contact Notes
0	Likes to go on hikes. Looking to refinance in 6 mths.

Add **Contact Notes**.

	AJ	AK	AL
	Occupancy	Referring Agent	Subject A
	primary	Vanessa Fletcher	110 Eagle

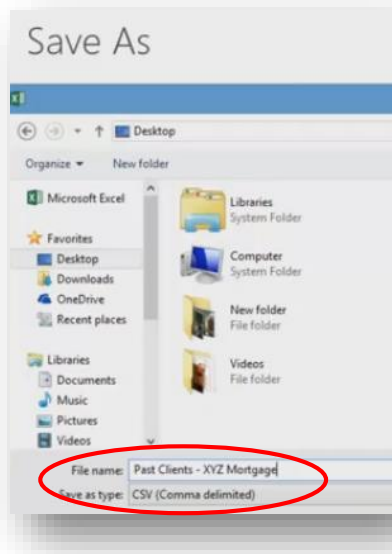
So post-close pieces will be co-branded, enter a **Referring Agent**.

For co-branding to work, you will also need to load each co-brand partner into your database as a contact.

At a minimum, you will need to provide: **First Name, Last Name, Company, Company Address, City, State, Zip, Phone, Cell and email.**

We will upload up to 50 real estate agents for you.

A	B	C	D	E	F	G	H	I	J
First Name	Last Name	Company	Address	City	State	Zip	Phone	Cell	Email



When complete, **save your worksheet as a CSV file** and assign it a name that will help the Top of Mind team members recognize it when they begin work.

Submit the spreadsheet to your account manager via email.

Uploading from Your LOS

Calyx Point Reporting

Click on the title of any tutorial below to open the dedicated page for that tutorial with more detailed information. Or you can watch the video on this page by clicking the play button. Videos are better viewed in full screen mode by clicking the full screen button (⌕).

Running the Calyx Point Report

Installing the Calyx Point Report

Point Data Server Reporting Error

How to run the Top of Mind Networks report in Point and submit closings for Surefire.

How to install the Top of Mind Networks report in Calyx Point.


Look familiar? *Errors were detected. Would you like to view the error report? Sometimes when running our report in Point, the Point Data Server can cause an error. Watch this video to learn how to fix the problem.

If you use Point, we have three videos at: <http://topofmind.tv/surefire/getting-started/calyx-point-reporting/>.


Watch the **Installing the Calyx Point Report** first. Be sure to click on the link to watch it.

This video demonstrates how to install the Top of Mind Networks report in Calyx Point. This video references a RPT file that was emailed to you. If you do not have this file, please click below to download the file. Or you can download the spreadsheet to view what fields we collect.

Related Files:



Point Report RPT File




Point Report Fields

After you click, you'll see the video and **Related Files** beneath. These will allow you to upload a template into Point to do the work for you and your LOs.

Watch **Running the Calyx Point Report** next. After you run the report, if there are any errors, watch the **Point Data Server Reporting Error** video.

Encompass Reporting

Creating the Encompass Report



00:00 / 03:17

This video demonstrates how to create the Top of Mind report within Encompass. Please click the title above to view full page video where you can download the referenced files.

Running the Encompass Report



00:00 / 02:15


How to run the Top of Mind Networks report in Encompass and submit closings for Surefire.

Encompass users have two videos at:
<http://topofmind.tv/surefire/getting-started/encompass-reporting/>.

Watch the **Creating the Encompass Report** video first. Be sure to click on the link to watch it.

This video demonstrates how to create the Top of Mind report within Encompass. The Excel and image files referenced in the video that have the appropriate Encompass fields are below.

Related Files:



Excel File - Encompass Report Fields




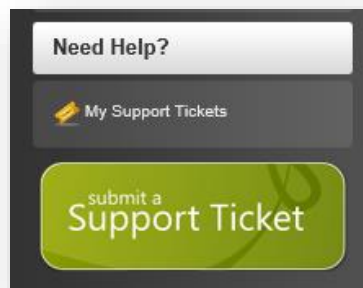
Image File - Encompass Report Fields

After you click, you'll see the video and **Related Files** beneath. These will give you a map of fields to download and review to build your custom report in your LOS.

Then watch **Running the Encompass Report**.

**Byte
PC Lender
Mortgage Flex
Avista
Proprietary**

If you have another LOS, such as the ones listed here, create a **Support Ticket** so a Top of Mind team member can schedule some time to help you.



It's that simple!

surefire
by top of mind