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.

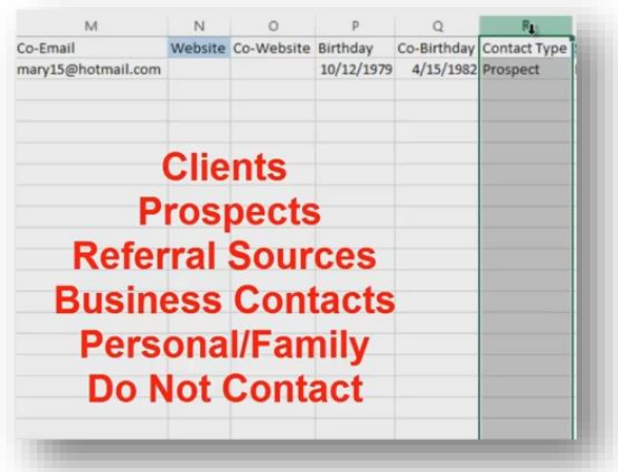
The list is color coded for required, highly important, optional and just added (and really nice to have) fields. You can download the list http://wp.eeoo.co/Top_of_Mind__Critical_Database_Fields_2__2_.xlsx The green section is required for co-branding purposes.

You can load data for multiple LOs in one spreadsheet.

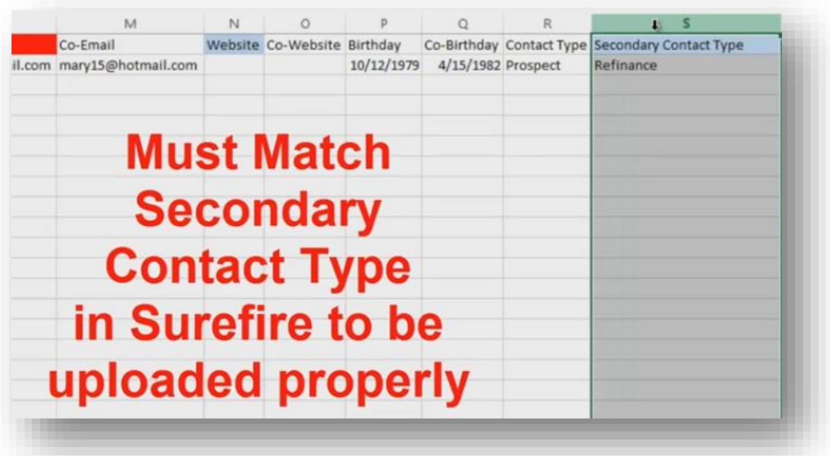
A	B	C	D	E	F	G	H
Loan Officer	First Name	Last Name	Co-First Name	Co-Last Name	Nickname	"Co-Nickname	Phone
	Johnathan	Thomas	Mary Ann	Thomas	John	Mary	828-989-6646

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.

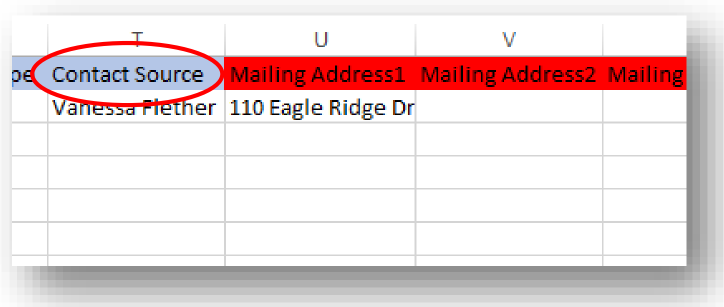


Contact Types are important for segmenting your database. Available contact types are Clients, Prospects, Referral Sources, Business Contacts, Personal/Family and Do Not Contact.



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*.



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

T	U	V	
Contact Source	Mailing Address1	Mailing Address2	Mailing
Vanessa Flether	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
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.**

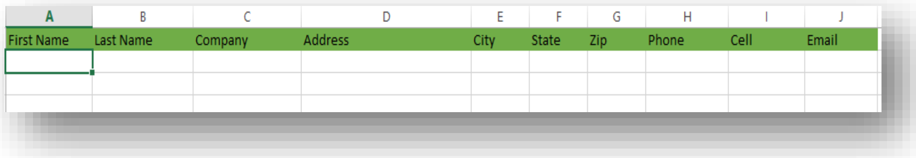
AW
Contact Notes
Likes to go on hikes. Looking to refinance in 6 mths.

Add **Contact Notes**.

AJ	AK	
upancy	Referring Agent	Subject A
ary	Vanessa Fletcher	110 Eagle

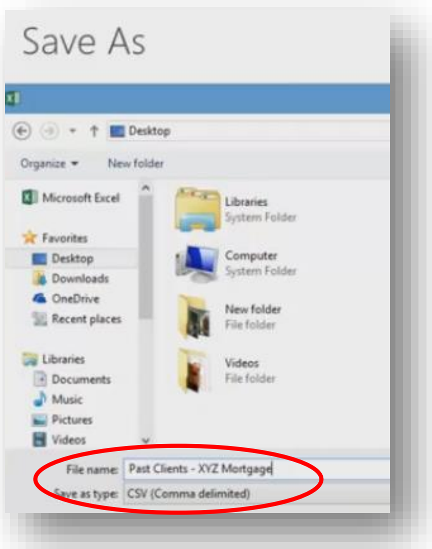
So post-close pieces will be co-branded, enter a **Referring Agent**.

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.**

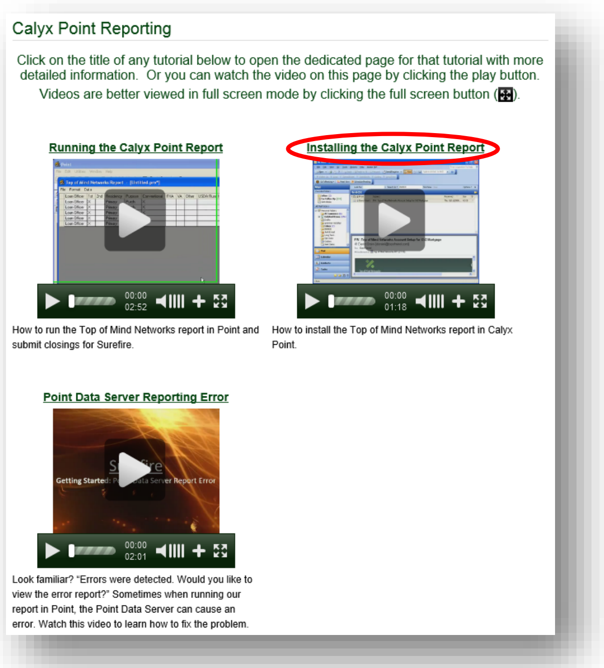
We will upload up to 50 real estate agents for you.



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



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

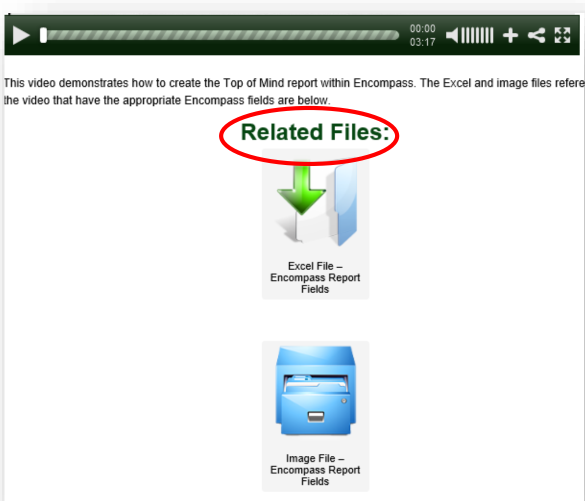
Watch the **Installing the Calyx Point Report** first. Be sure to click on the link to watch it.

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

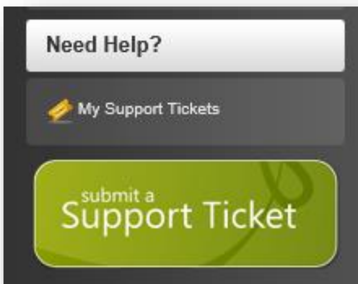
Watch the **Creating the Encompass Report** video first. Be sure to click on the link to watch it.



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.**

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!