

# New Account Set Up Checklist

## Access Profile & Accept Impersonation

- Receive email with username & password for profile access
- Accept “Impersonation request” so Top of Mind can help provide support

## My Company / Company Info

- Add Company Logo & Secondary Logo (EHL) – [Click for Help Article](#)
- Establish Company Signature Block – [Click for Help Article](#)
- Add Company Disclaimer – [Click for Help Article](#)
- State Level Licenses – add if appropriate
- Add Additional User Seats by clicking “New User” – [Click for Help Article](#)

## My Account / My Profile

- Add Personal Profile Information – [Click for Help Article](#)
- Establish Integrations – Zapier, Outlook & FB – [Click for Help Article](#)
- Edit Picture, Logo and Signature – [Click for Help Article](#)
- Add Personal NMLS # into Licensing Section: [Click for Help Article](#)

## My Account / My Settings

- Set-Up Power Messaging Number – [Click for Help Article](#)

## My Account / Notification Center

- Configure Notification Settings – [Click for Help Article](#)

## Sales Settings/Contact Types

- Review Default Contact Types, and Create Custom Contact Types (optional, if desired) – [Click for Help Article](#)

## Organize & Submit Data for Upload

- Review data upload requirements & video before submitting for upload
- Data Upload Requirements & Video
  - Watch the [Video Here](#)
  - List column headers to identify the content for every column
  - Each contact must have a first and a last name to be uploaded
  - List a contact type for each contact. If there is a name on the spreadsheet, a contact type must be assigned for upload.
  - Contact types must exactly match those in Surefire [Click for Help Article](#)
  - List the User/Loan Officer that should own the contacts within Surefire for each contact
  - Surefire uses fields like email, birthday or mobile number to de-duplicate contacts, and at least one of these fields should be included for each contact
  - Please review and remove any of the following from your spreadsheet:
    - Extensions or notes listed after the 10 digit phone number
    - Fake phone numbers. Examples: (555) 555-5555 or (999) 999-9999
    - Terms that fill in blank fields. Examples: N/A, null, unknown and TBD
    - Copyright symbols
    - Irregular characters. Examples: [ ] < > Â ï ã€€ â™™ Â® ï¿½ Ê
  - Save in Excel .xlsx or .csv format

**COMMON ISSUES WITH SPREADSHEETS:**

	A	B	C	D	E	F	G	H	I	J	K
1	User email	LO name	Contact type	First Name	Last Name	Co First	Co Last	Cell Phone	Email	Buying Agent	Buying Contact type
2	loan1@user.com	loan officer 1	Clients	Jane	Doe	John	Doe		janedoe@fake.com		Real Estate Agent
3	loan1@user.com	loan officer 1	Client	Sara				(770) 969-9810	Sara@fake.com	Stephanie Perry	Real Estate Agent
4	loan2@user.com	loan officer 2	Client	Paula	Jones	N/A			pjones1@fake.com	Tom Smith	Real Estate Agent
5	loan2@user.com	loan officer 2	Client	Albert	Thomas	Susan	Thomas	(555) 555-5555	at21@fake.com		Real Estate Agent
6	loan2@user.com	loan officer 2	Client	Rebecca	Albertson	NULL	NULL		becky123@fake.com		Real Estate Agent
7	loan3@user.com	loan officer 3	Client	Tim	Allison	Laura	Allison		tfallison@fake.com	Michelle Jones	Real Estate Agent

Annotations in the image:

- Arrow from row 1, column A to a box: "User does not have an account in Surefire 3.0"
- Arrow from row 3, column C to a box: "Contact type does not exist in Surefire 3.0"
- Arrow from row 4, column E to a box: "Missing first or last name"
- Arrow from row 5, column F to a box: "General terms that fill blank fields"
- Arrow from row 5, column H to a box: "Removing fake phone numbers"
- Arrow from row 7, column K to a box: "Having a contact type listed for each name on the spreadsheet"

- Submit data spreadsheet for upload to [help@topofmind.com](mailto:help@topofmind.com). This will create a ticket for you to communicate with the Top of Mind team.
- Await reply on the completion of your data upload and next steps