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

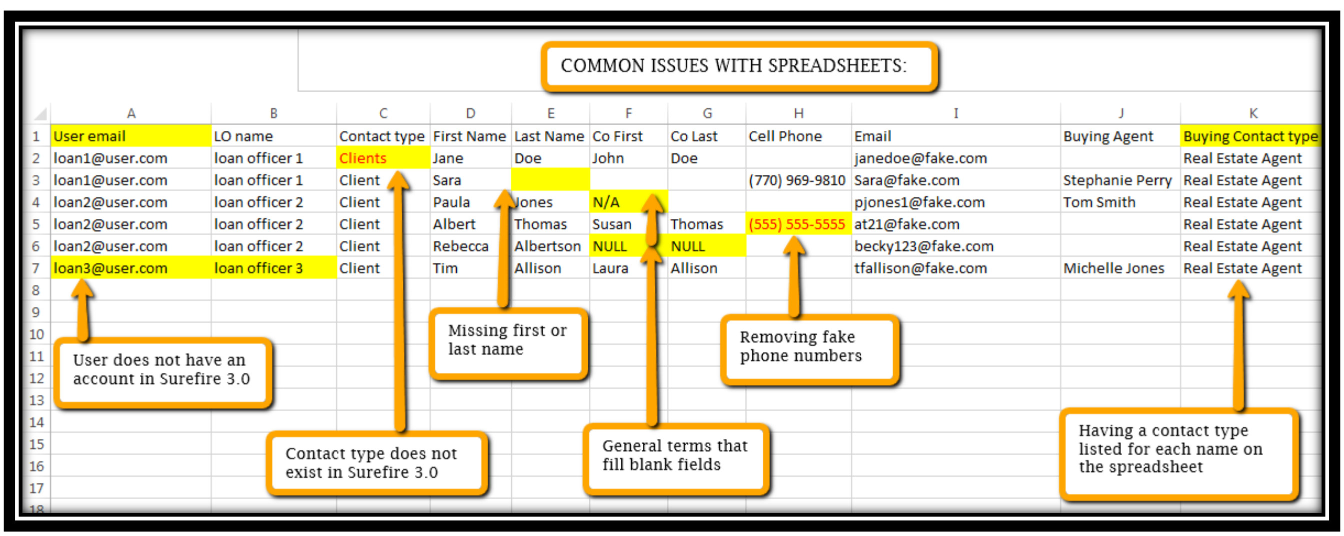
- ☐ Configure Notification Settings - Click for Help Article

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



- ☐ Submit data spreadsheet for upload to 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