



New Account Set Up Checklist

Once you receive your Surefire credentials in the next 1-2 business days, follow the checklist of items below to ensure your Surefire account set up is complete.

Email Delivery Set Up

- Request email server set up required to authorize Surefire to send emails on your behalf. Please read the overview below and [submit this form](#) to receive setup instructions.

Surefire CRM is a third-party email delivery service. To effectively use our service, you must edit the DNS server of your email domain to authorize Surefire to send emails on your behalf. Your IT Department or IT Consultant will usually make these edits. If you do not have an IT department, we will assist you. If you do not make these changes, you may not receive the emails we send to you, and the emails you send to your contacts may go to Spam folders. It is important that you make these changes as soon as possible to ensure trouble-free email delivery.

My Company / Company Info

- Add Company Logo - [Click for Help Article](#)
- Add Company Disclaimer and/or Company License in Licensing tab - be sure to add a comma in the State License Delimiter field before saving
- State Level Licenses - add if appropriate

My Account Profile

- Add Personal Profile Information - [Click for Help Article](#)
- Add Personal NMLS # into Licensing Section - [Click for Help Article](#)
- Establish Integrations - [Facebook](#), [LinkedIn](#), [Zapier](#)

Sales Settings/Contact Types

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

Organize and Submit Data for Users

We'll perform a one-time upload of your contact data. Following are upload requirements and data formatting best practices. Refer to this [data uploader video series](#) for additional support.

Data Requirements and Best Practices

- Save in Excel .xlsx or .csv format
- List column headers to identify the content for every column
- Each contact must have a first and 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 email, birthday, or mobile number to match duplicate contacts – at least one of these fields should be listed for each contact.
- Please be aware that the following items will not upload to Surefire
 - o Extensions or notes listed after the 10-digit phone number
 - o Fake phone numbers. Examples: (555) 555-5555 or (999) 999-9999
 - o General terms that fill in blank fields. Examples: N/A, null, unknown and TBD
 - o Copyright symbols ®
 - o Irregular characters. Examples: [] < > ÿ å€€ â™™ ® ÿ½ Ê

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:

- Row 2: User does not have an account in Surefire 3.0 (points to User email)
- Row 3: Contact type does not exist in Surefire 3.0 (points to Clients)
- Row 4: Missing first or last name (points to Jones)
- Row 5: General terms that fill blank fields (points to N/A)
- Row 6: Removing fake phone numbers (points to (555) 555-5555)
- Row 7: Having a contact type listed for each name on the spreadsheet (points to Clients)

Data Submission

Submit a Zendesk ticket using the following instructions to send the data to Surefire's data team for upload.

1. Log into Surefire, click on the drop down in the upper right-hand corner next to your name
2. Click Help Center, select Submit a Request, then Support Request
3. Subject Line: Seed Data – "Company Name" and attach the spreadsheet
4. Attach the Spreadsheet(s)