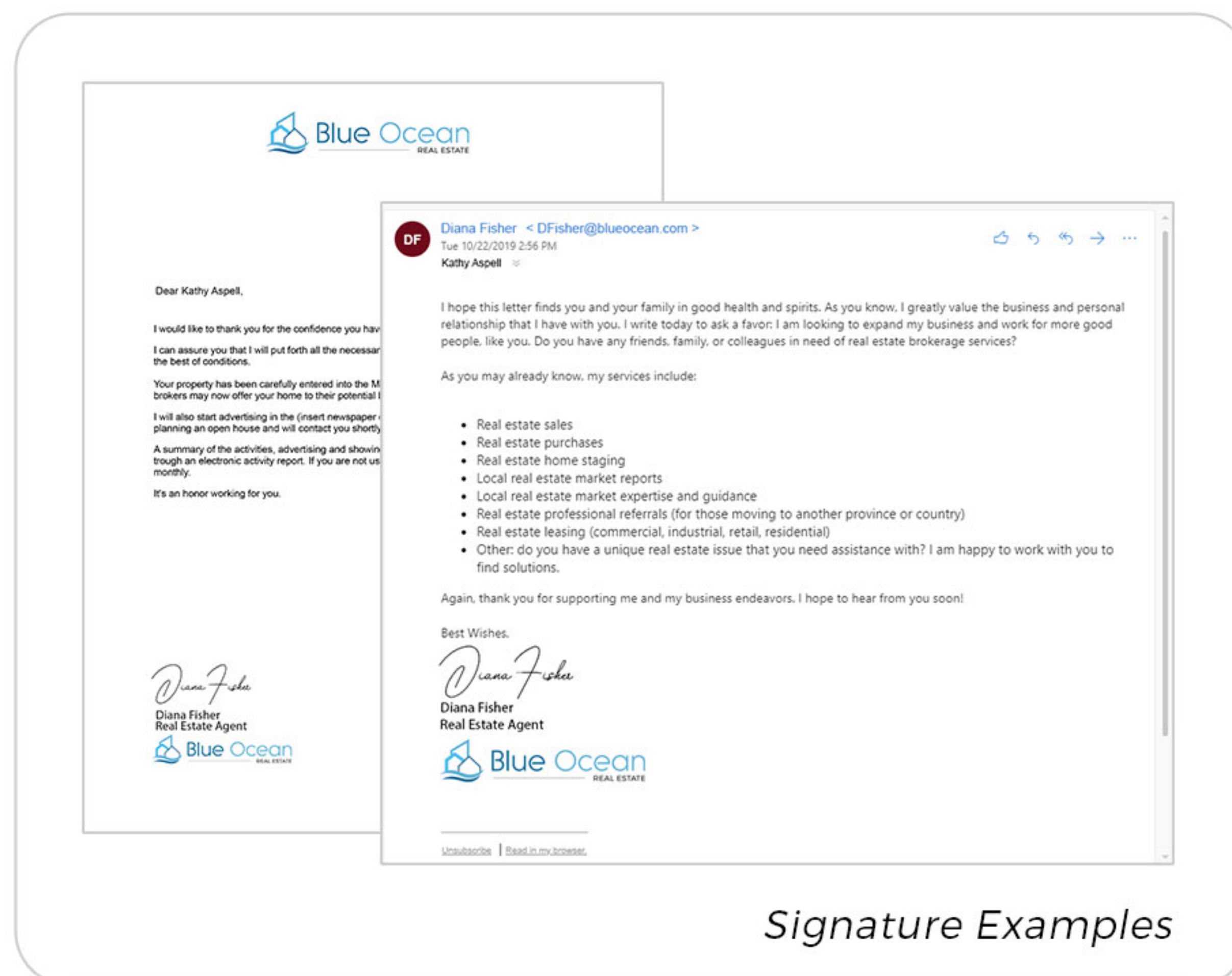
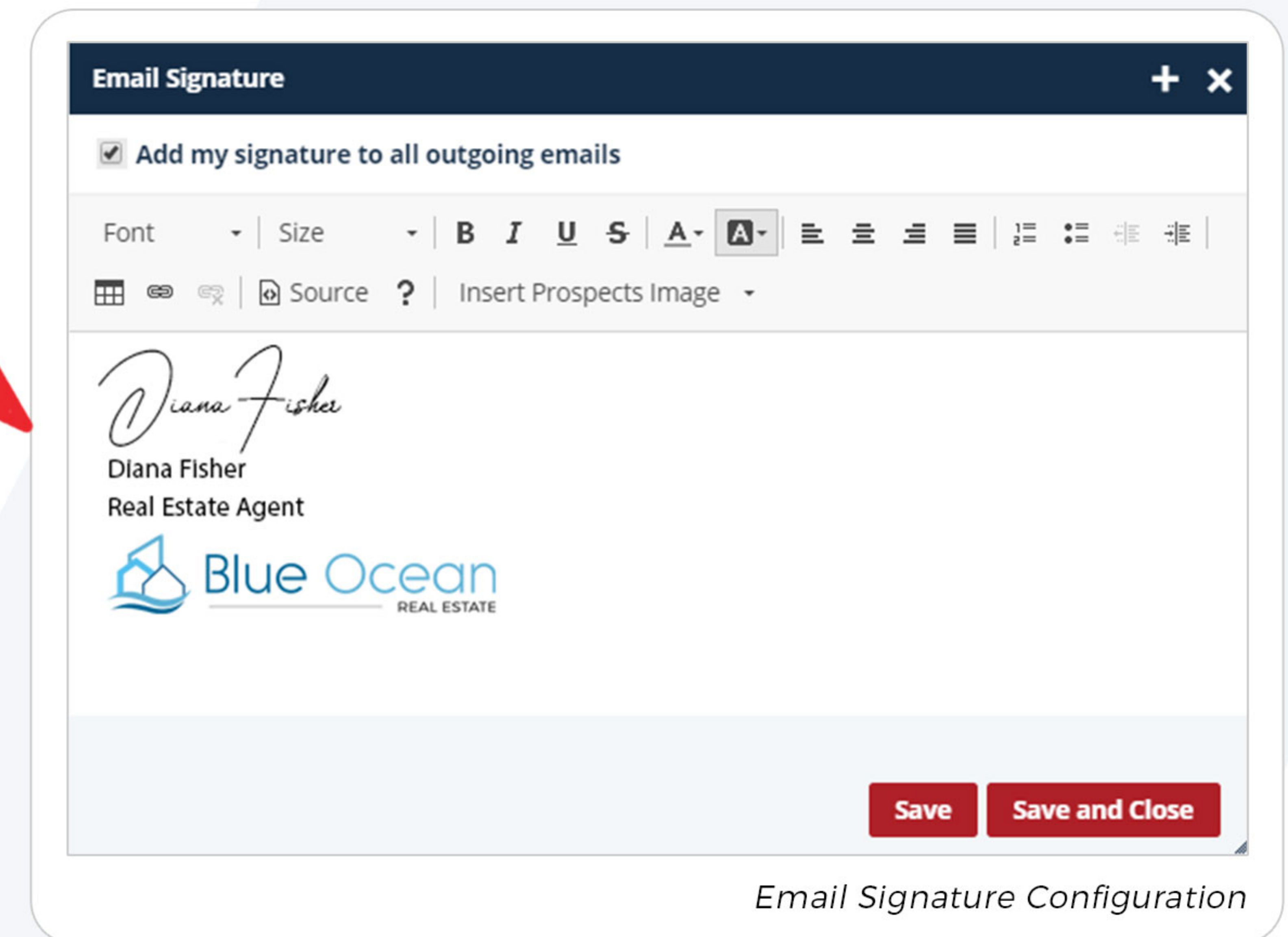
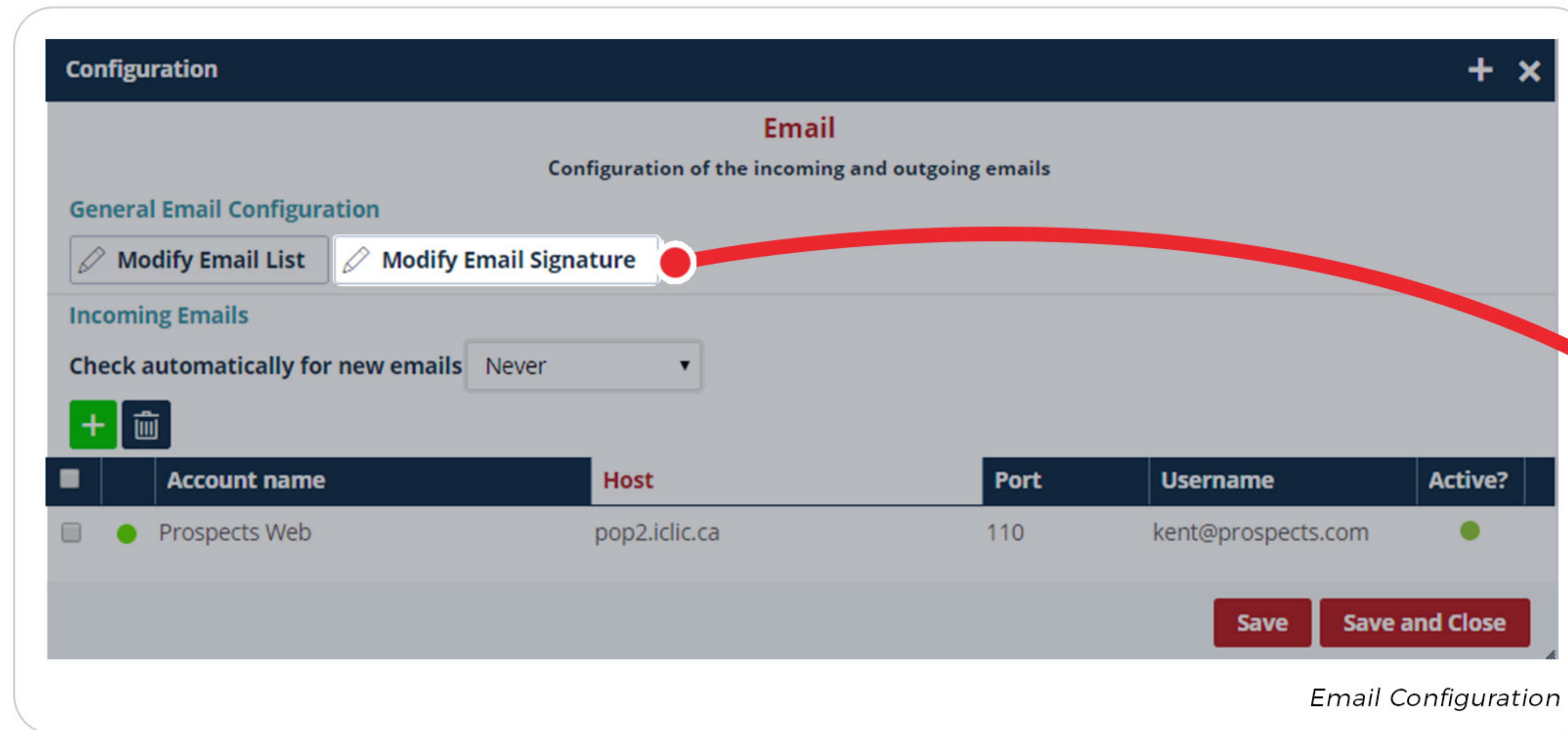
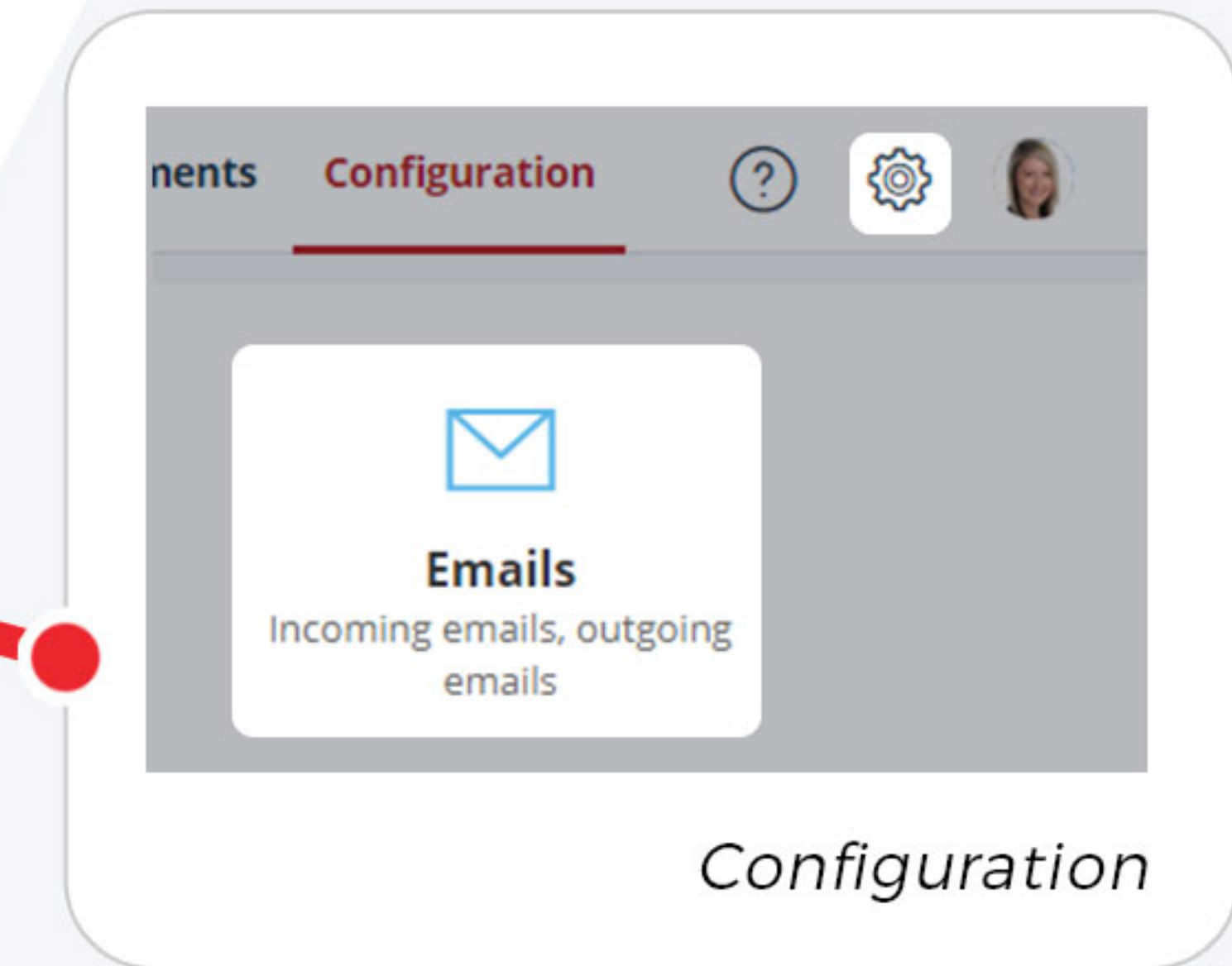


YOUR BUSINESS **ON AUTOPILOT**

Personalize Your Email Signature

Be sure you are clearly identified in all your communications prepared through your CRM by adjusting your email signature through the Emails > Configuration.



Signature Examples

DID YOU KNOW?
You can add any image from your CRM's Images Library to your email signature. Upload additional images to this Library under the **Configuration > Customization > Images Management** section of your CRM.

Prepare & Schedule Email Campaigns (1/2)

Your CRM offers several text templates that are perfectly suited for all occasions.

Use the included templates or create new ones to send automated emails or print letters.

● Create a New Template

● Search by Category

● Manage Categories

Category	Template
ACM	First impression
ACM	Net sheet
ACM	Présentation
ACM	Présentation
ACM	Résultats
ACM	Texte plan d'actions
ACM	Why do business with a broker
ACM	3 strategies to attract higher offers
Email Layouts	A favor
Email Layouts	Closing costs: you've got options
Email Layouts	Common mistakes homebuyers make

● Delete Selected Template

● Specify a Description

● Create a Duplicate of this Template

● Choose a Subject Line (if used for email purposes)

● Assign a Category

Text Templates

Description: Congratulations #1

Category: Buyer

Language: English

Subject: Congratulations on your new purchase!

Font | Size | **B** | **I** | **U** | **S** | A | A | [Icons] | Source | ?

Insert Prospects Image | Add Contacts Information | Add Listings Information | Insert Other Field | Preview

[letterGreet]

I would like to congratulate you on the purchase of your new property. The confidence that you have placed in me during your search is much appreciated, and I had much pleasure pursuing this project with you. It is important for me to offer you quality service, and I hope to have met your standards. Please know that I am available to answer any questions you may have.

Should you further require my services, please do not hesitate to contact me- it will be my pleasure to work with you again.

Looking forward to hearing from you.

Your broker,

[signature]

Save Save and Close

● Insert Dynamic References

● Insert an Image (from your CRM Images Library)

DID YOU KNOW?

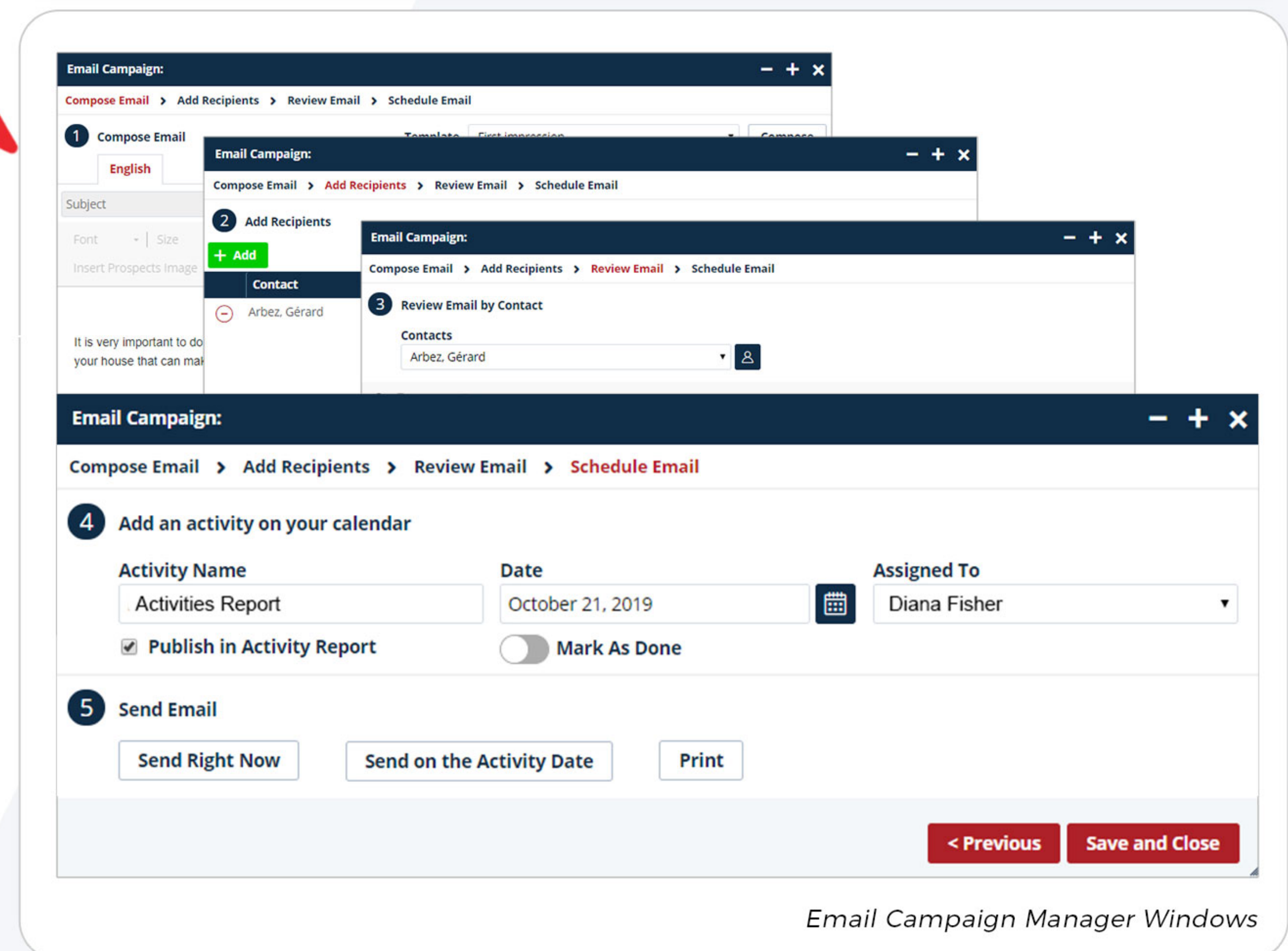
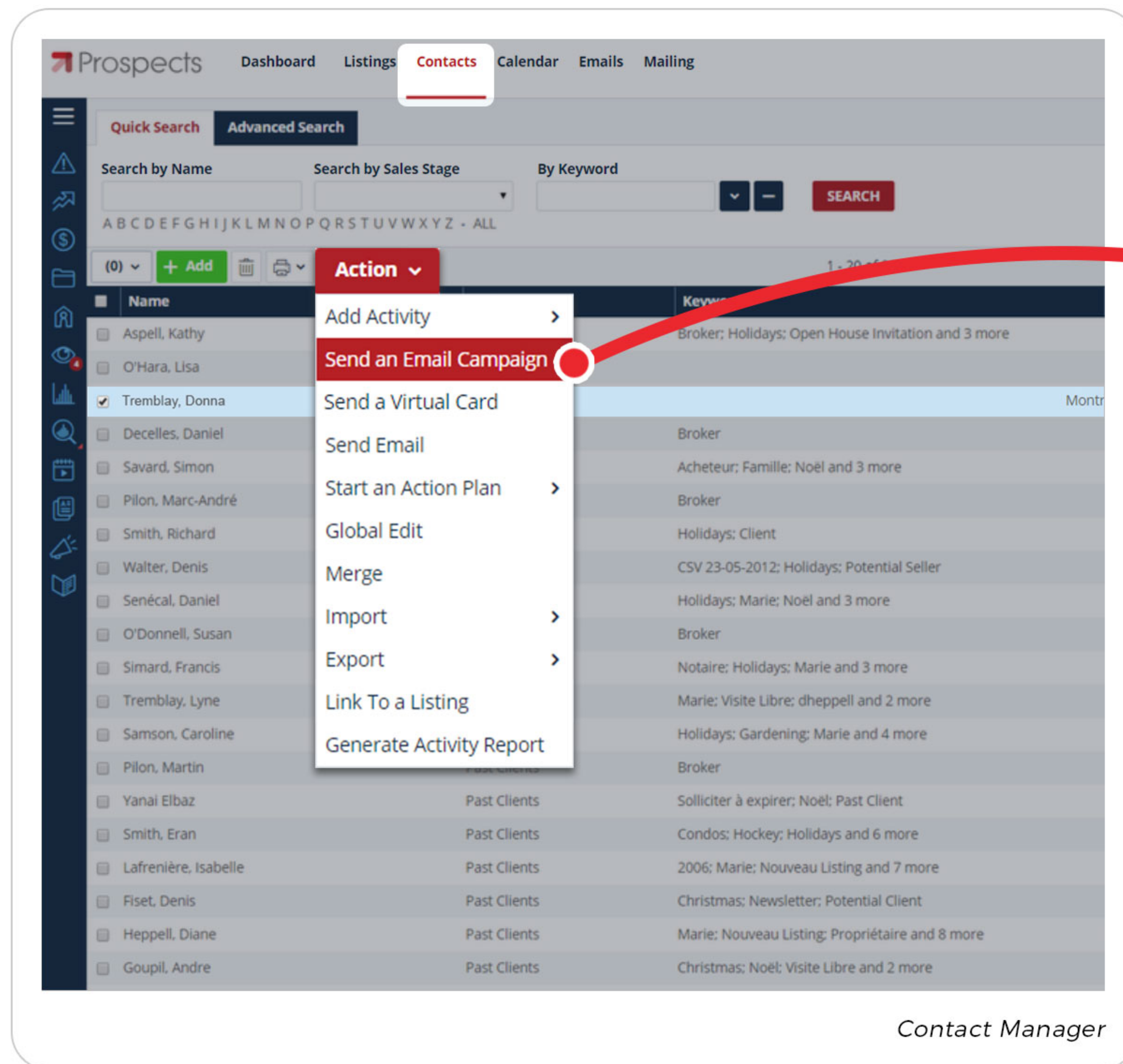
Dynamic references can be included in your templates, so your messages are personalized automatically every time you use them to communicate with someone new!

Prepare & Schedule Email Campaigns (2/2)

You can prepare and schedule email and mailing campaigns with the help of any of your templates to communicate easily with any of your contacts.

DON'T FORGET

You will always be required to select the recipients of your mailing campaign from your list of contacts before you can proceed.



DID YOU KNOW?

You can easily print labels or envelopes for your mailing with the option under the **Print** menu.

You can schedule your email campaign for a later date by adjusting the **Date** accordingly and clicking on the **Email On The Activity's Date** button

Prepare and Send Virtual Cards*

Communicate with your clients in a more fun and colorful way with the Virtual Card feature. Some of the models available can even include the details of a specific listing when sending open house invitations, new listing announcements, and more!

Prospects Dashboard Listings **Contacts** Calendar Emails Mailing

Quick Search Advanced Search

Search by Name Search by Sales Stage By Keyword

ABCDEF GHIJ KLMNOPQRSTUVWXYZ - ALL

(0) + Add

Action

- Add Activity
- Send an Email Campaign
- Send a Virtual Card**
- Send Email
- Start an Action Plan
- Global Edit
- Merge
- Import
- Export
- Link To a Listing
- Generate Activity Report

Name Keywords

Aspell, Kathy	Brok
O'Hara, Lisa	
Tremblay, Donna	Brok
Decelles, Daniel	Broker
Savard, Simon	Acheteur; Famille; Noël and 3 more
Pilon, Marc-André	Broker
Smith, Richard	Holidays; Client
Walter, Denis	CSV 23-05-2012; Holidays; Potential Seller
Senécal, Daniel	Holidays; Marie; Noël and 3 more
O'Donnell, Susan	Broker
Simard, Francis	Notaire; Holidays; Marie and 3 more
Tremblay, Lyne	Marie; Visite Libre; dheppell and 2 more
Samson, Caroline	Holidays; Gardening; Marie and 4 more
Pilon, Martin	Broker
Yanal Elbaz	Solliciter à expirer; Noël; Past Client
Smith, Eran	Condos; Hockey; Holidays and 6 more
Lafrenière, Isabelle	2006; Marie; Nouveau Listing and 7 more
Fiset, Denis	Christmas; Newsletter; Potential Client
Heppell, Diane	Marie; Nouveau Listing; Propriétaire and 8 more
Goupil, Andre	Christmas; Noël; Visite Libre and 2 more

Contact Manager

Virtual Card: Choose Template > Compose Card > Add Recipients > Review Card > Send Card

- Choose a Template
- Compose Card
- Add Recipient
- Review your cards
- Add an activity on your calendar
- Send Card

Activity Name: Showing - Fence Date: January 31, 2020 Assigned To: Diana Fisher

Publish in Activity Report

Send Right Now Send on the Activity Date Print

< Previous Save and Close

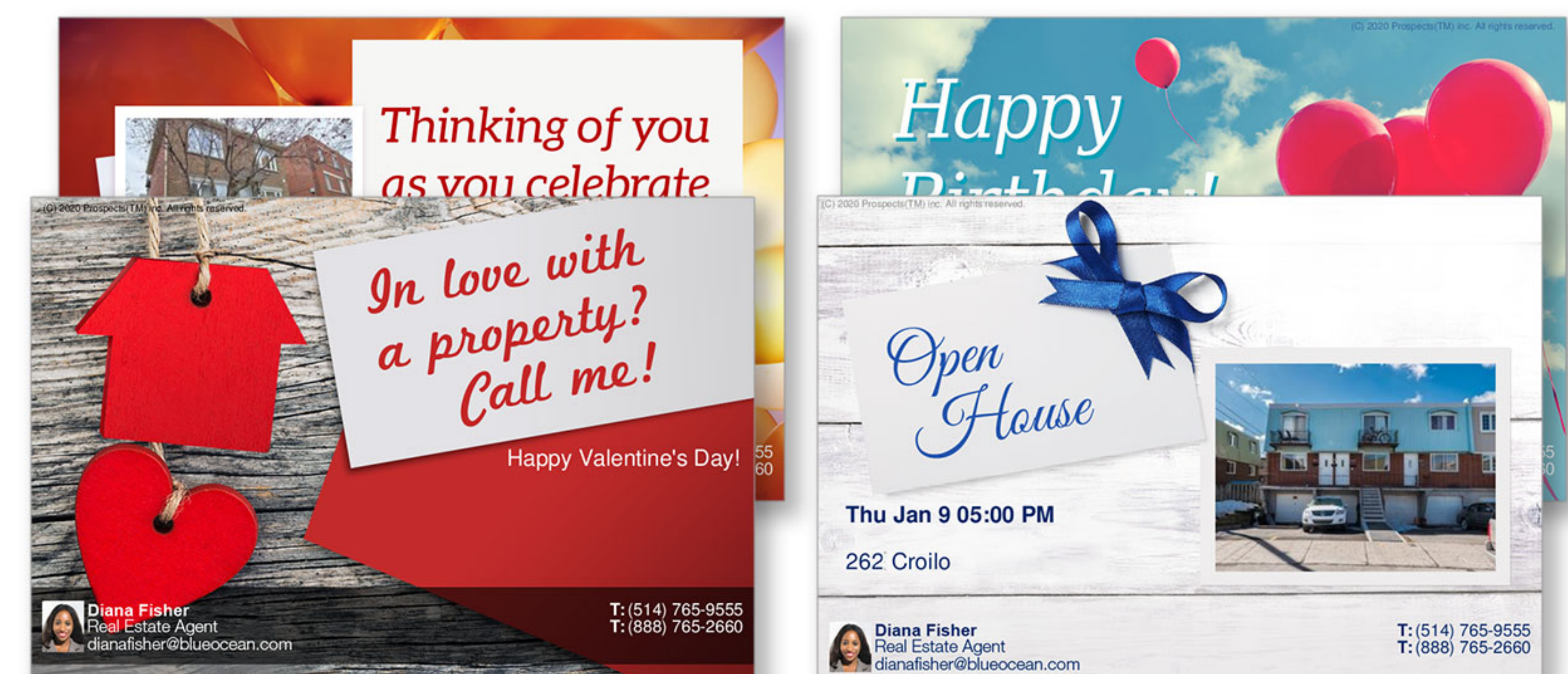
Virtual Card Manager Windows

DID YOU KNOW?

You can schedule a virtual card to be emailed at a later date by adjusting the **Date** accordingly and clicking on the **Email On The Activity's Date** button.

5

*Available in participating markets.

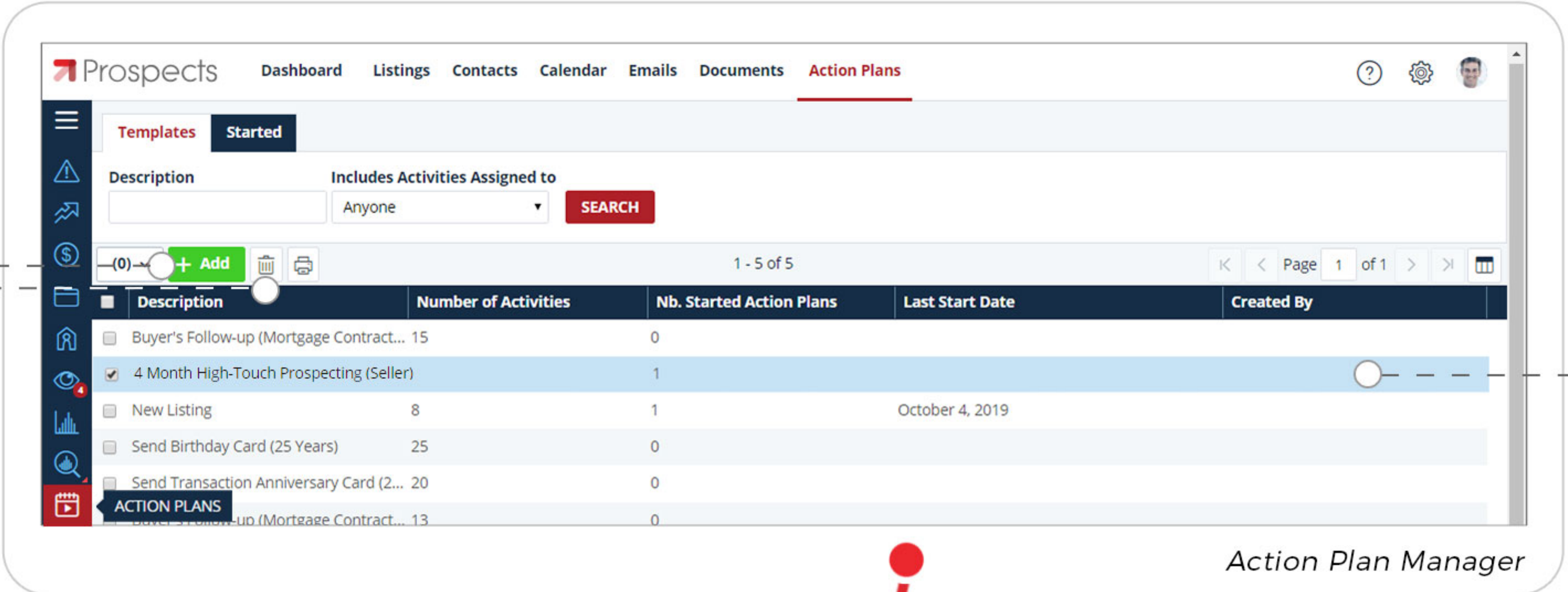


Virtual Card Examples

Use Action Plans to Automate Communications & Reminders (1/2)

The ultimate tool to save time and get organized are Action Plans. Create simple or complex email-drip campaigns, action or reminder sets in seconds!

● Create a New Action Plan

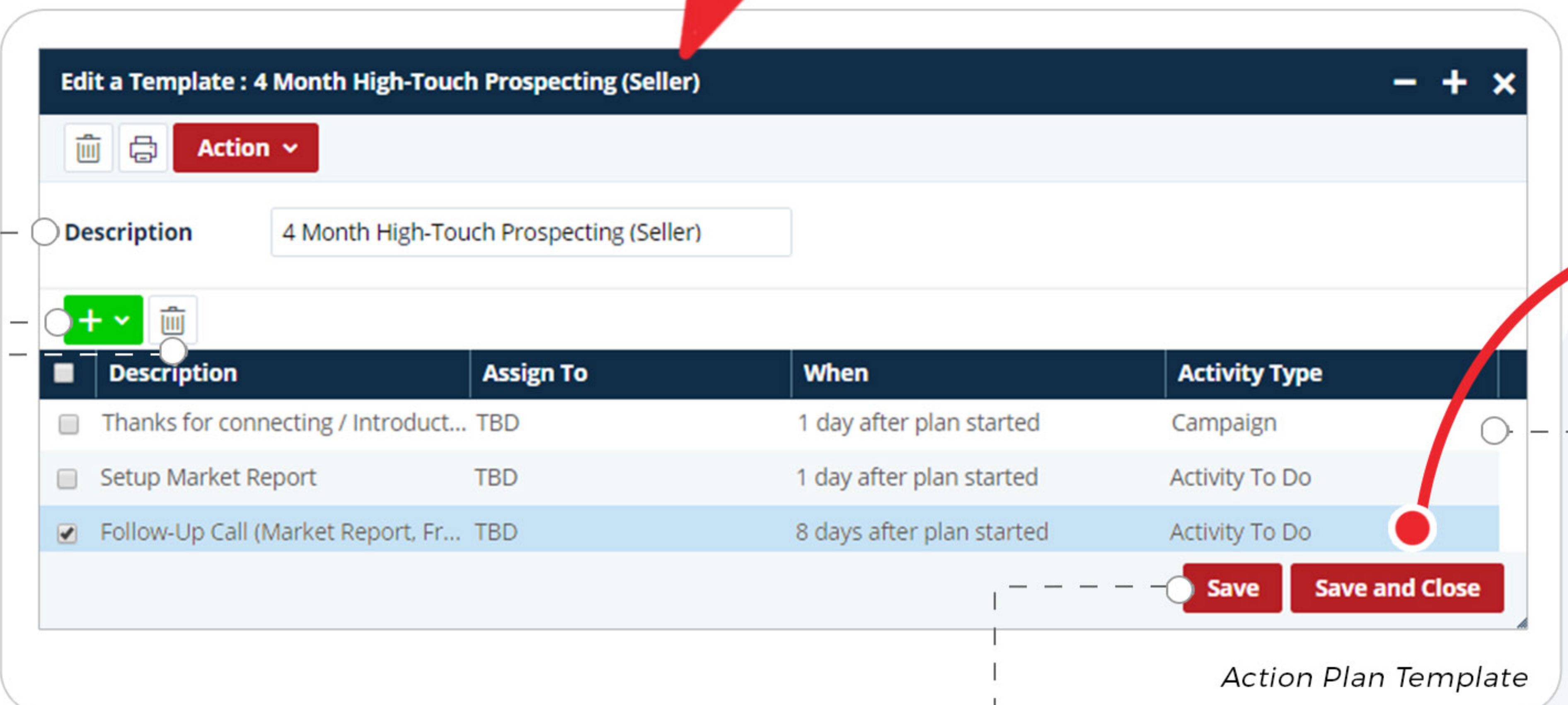


Action Plan Manager

● Delete Selected Action Plan

● Specify a Description

● Modify Existing Action Plan (double-click on the desired one)



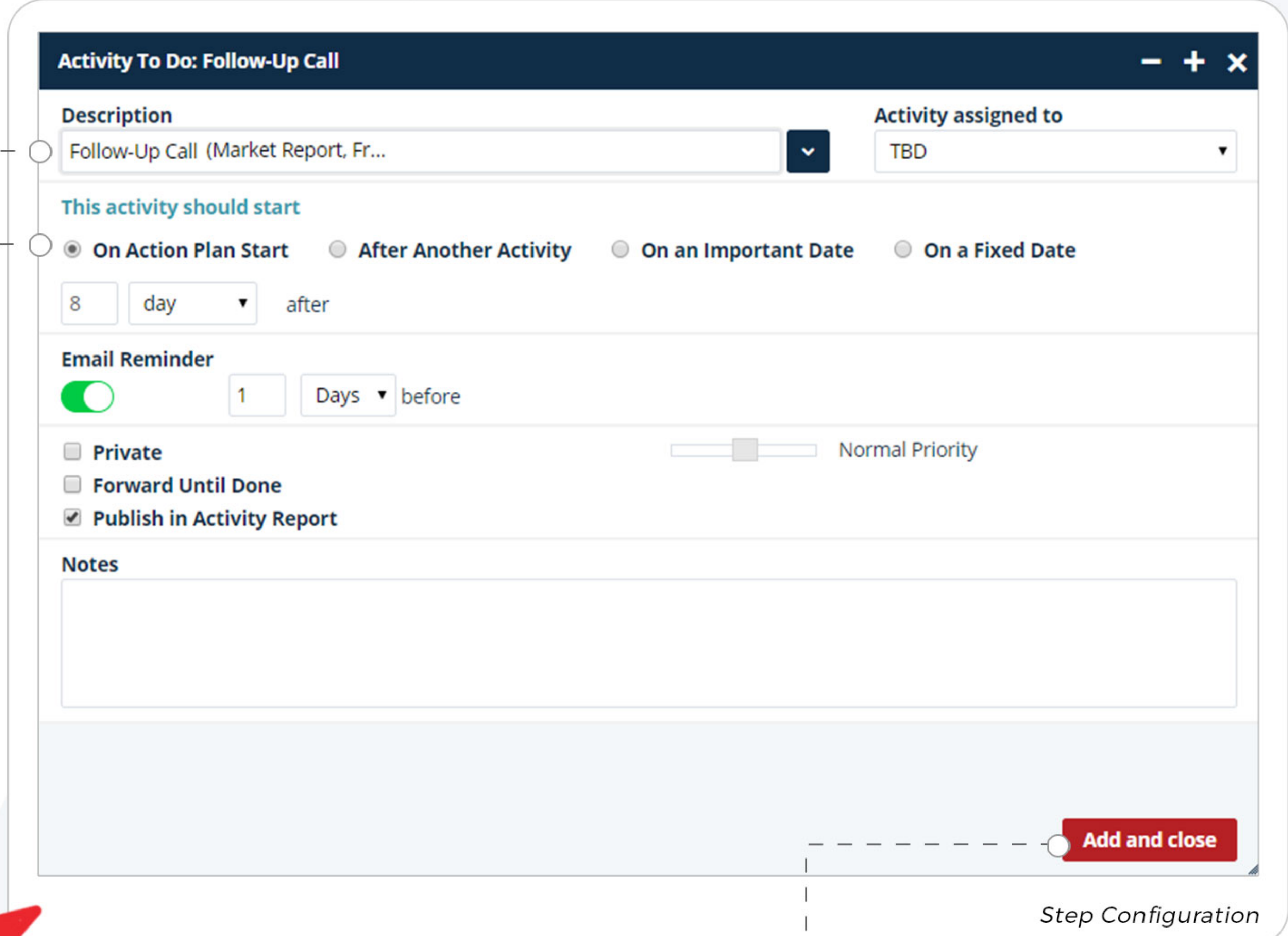
Action Plan Template

● Add a Step

● Remove Selected Step

● Save Action Plan

● Specify a Description



Step Configuration

● Determine a Timeframe
(based on the Start Date, another step in the Action Plan, an Important Date saved in client's Contact Record, or a Fixed Date.)

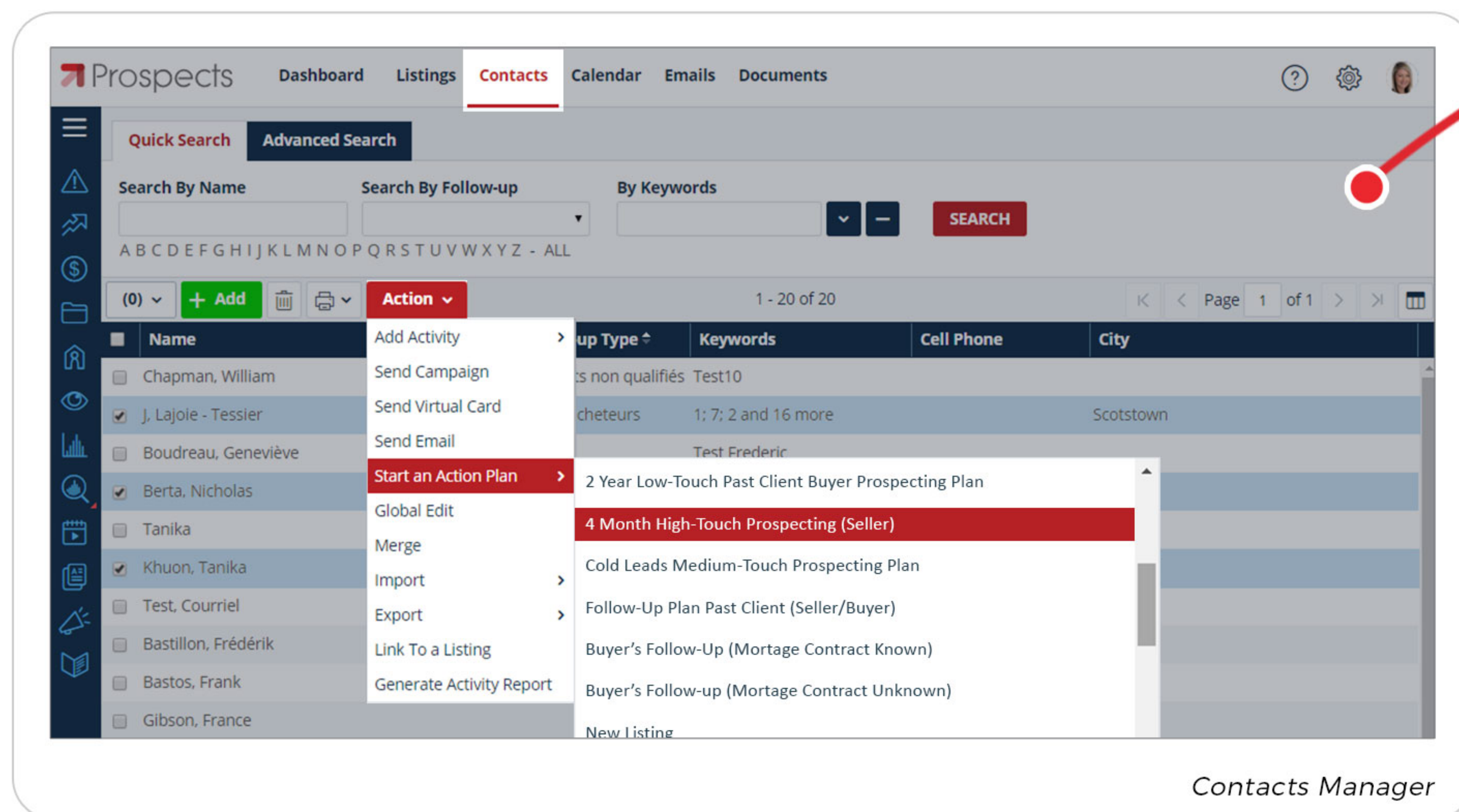
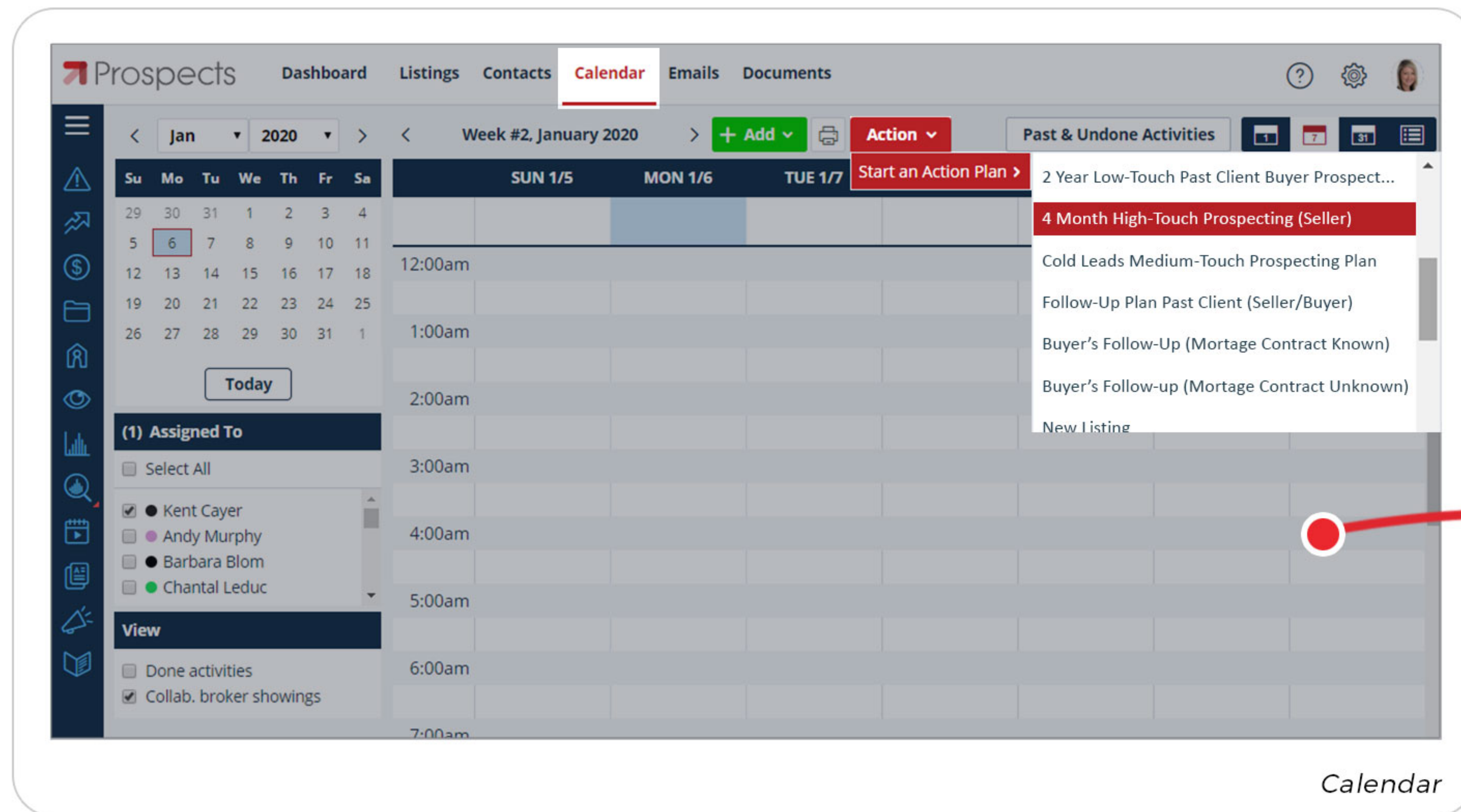
● Add Step and Save

6

DID YOU KNOW?
An action plan can contain as many steps as you wish and you have full control of its time frame

Use Action Plans to Automate Communications & Reminders (2/2)

Launch an Action Plan for one or multiple clients through your Calendar or Contacts Manager and let your CRM help you manage your business!



Specify the Contact, Listing and/or Agent Involved

Determine a Start Date

Start an Action Plan : 4 Month High-Touch Prospecting (Seller)

Assign To: Kent Cayer

Start Date: January 6, 2020

Contact: Last Name, First Name

Listing: Address

Broker: Last Name, First Name

Edit activities

Description	Activity assigned to	When	Activity Type
<input checked="" type="checkbox"/> Thanks for connecting / Introduct...	TBD	1 day after plan started	Campaign
<input type="checkbox"/> Setup Market Report	TBD	1 day after plan started	Activity To Do
<input type="checkbox"/> Follow-Up Call (Market Report, Fr...	TBD	8 days after plan started	Activity To Do
<input type="checkbox"/> Create Hot Sheet and Send Rece...	TBD	16 days after plan started	Activity To Do
<input type="checkbox"/> Just wanted to share some recen...	TBD	16 days after plan started	Campaign
<input type="checkbox"/> Recent Sales Follow-Up, Was It H...	TBD	16 days after plan started	Activity To Do
<input type="checkbox"/> My clients are amazed by hoe we...	TBD	23 days after plan started	Campaign
<input type="checkbox"/> Review Hot Sheet and Send Rece...	TBD	1 month after plan started	Activity To Do

Start an Action Plan

Action Plan

Modify the List of Steps

Launch the Action Plan

DON'T FORGET

To start an **Action Plan** for multiple contacts, do not forget to select them first. You can launch one for up to 5 contacts simultaneously!

We Have the Answers to All Your Questions!

Technical Support

support@prospects.com

Visit Our Help Center

Getting answers to your questions is easier than ever. The Help Center is a hub of learning resources including articles, short video tutorials, on demand webinars and guides.

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