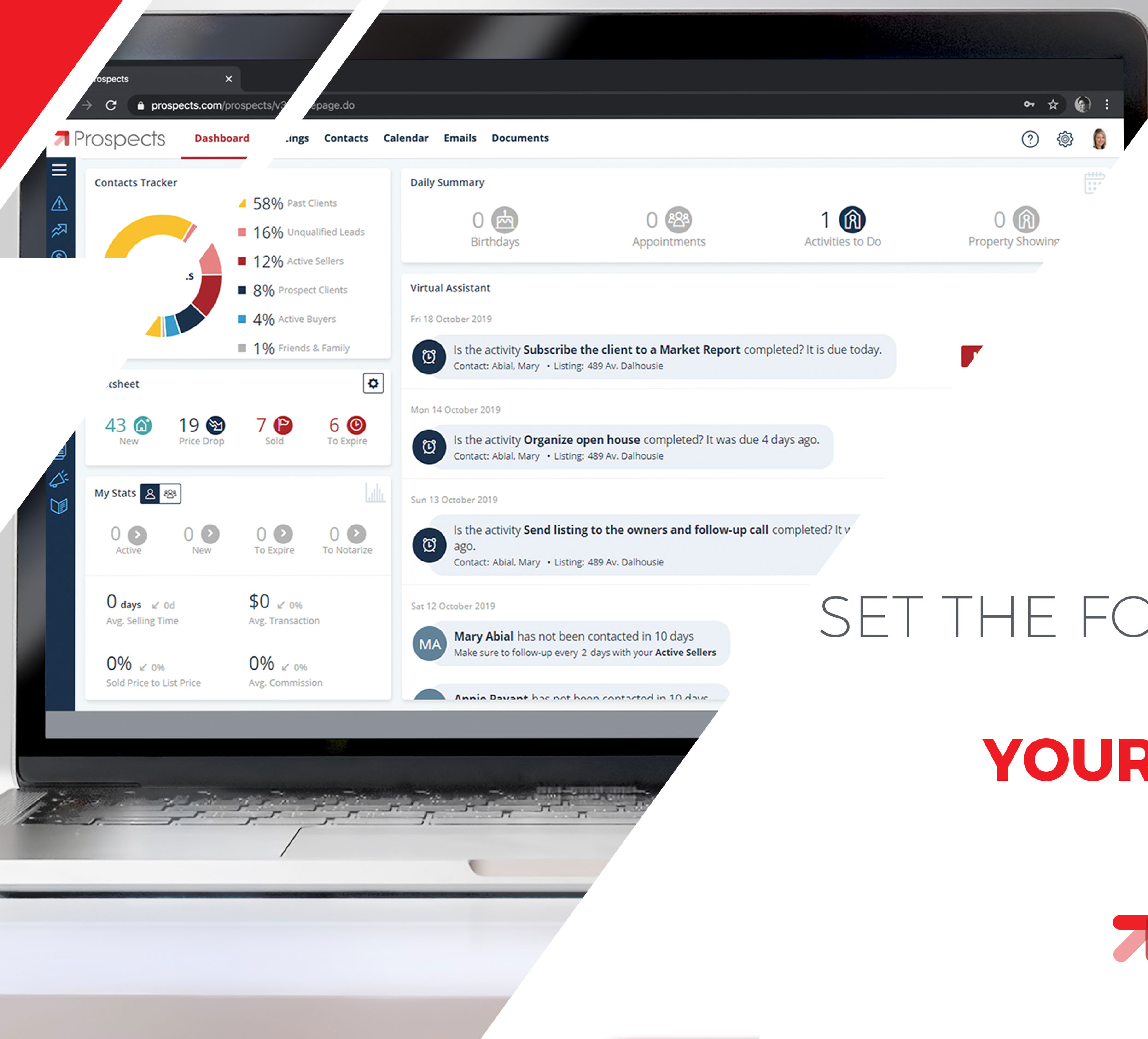
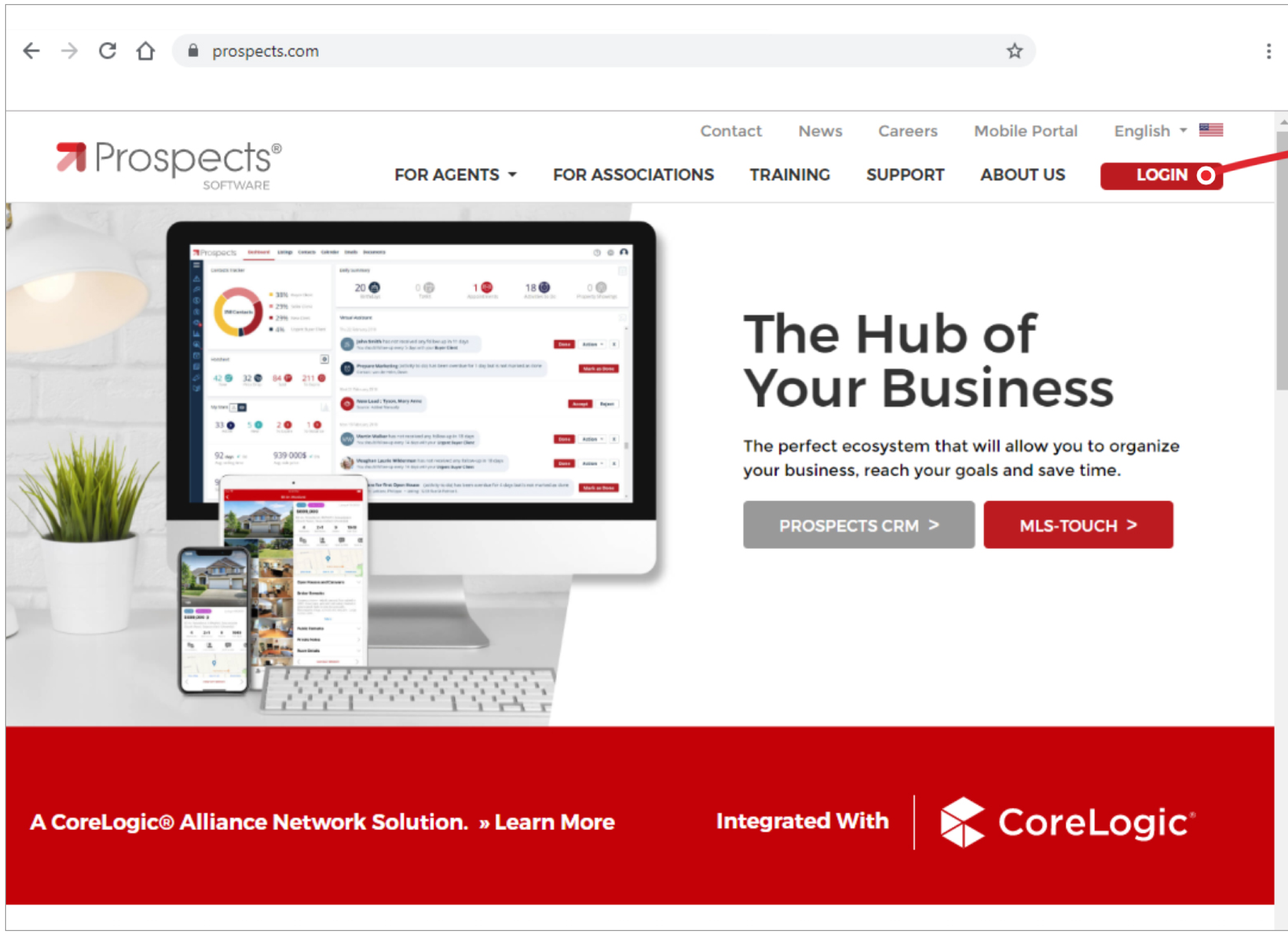


SET THE FOUNDATION TO GROW **YOUR BUSINESS**

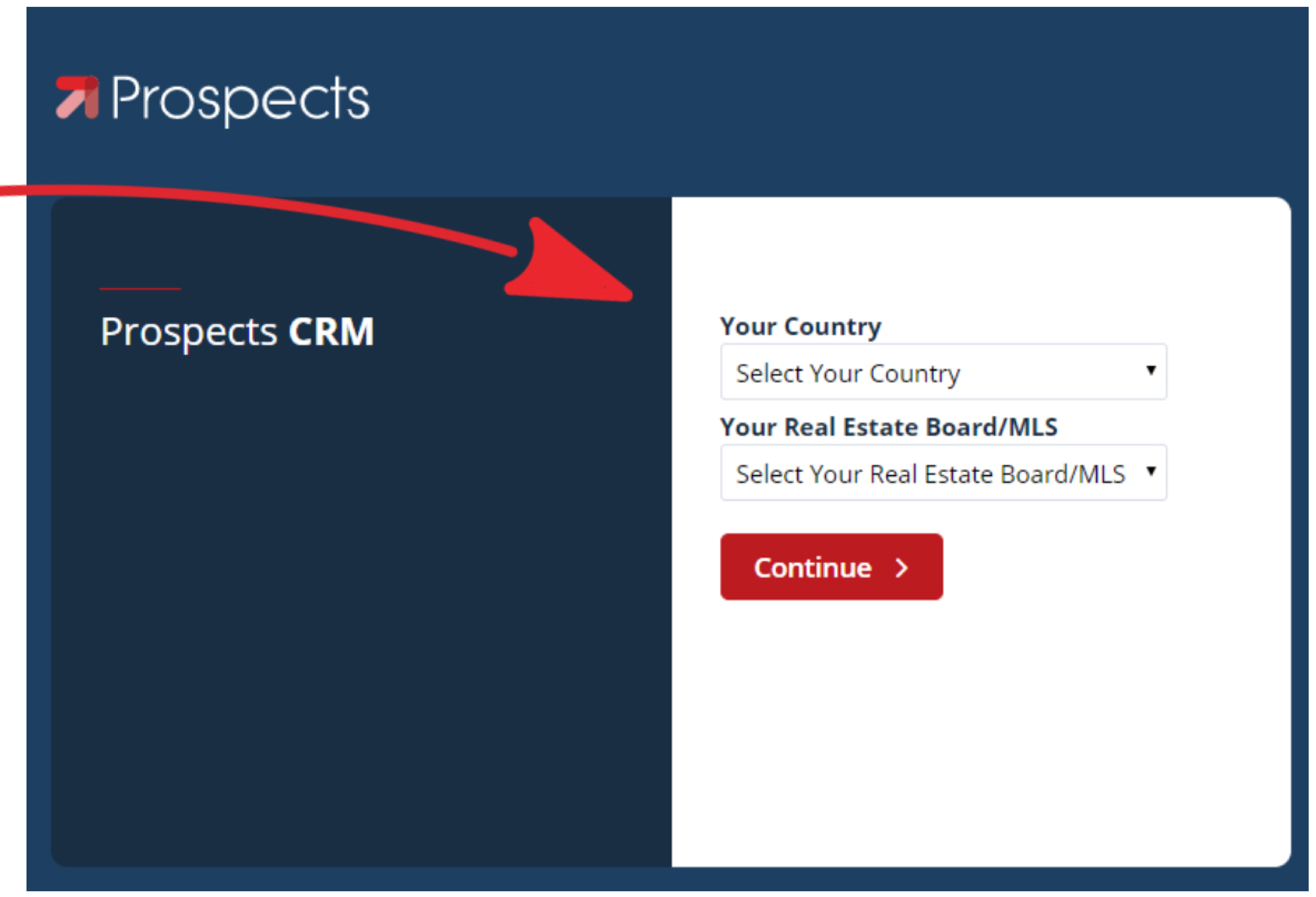
Prospects CRM

Fast and Simple Access to your CRM

You can easily access your CRM from any computer by visiting the prospects.com website and clicking on its Login button.



Prospects Official Website



Prospects CRM Login Screen

DON'T FORGET

You will be invited to choose your country and the name of your organization the first time you access Prospects CRM. Use your MLS **Username** and **Password** when asked to log in.

DID YOU KNOW?

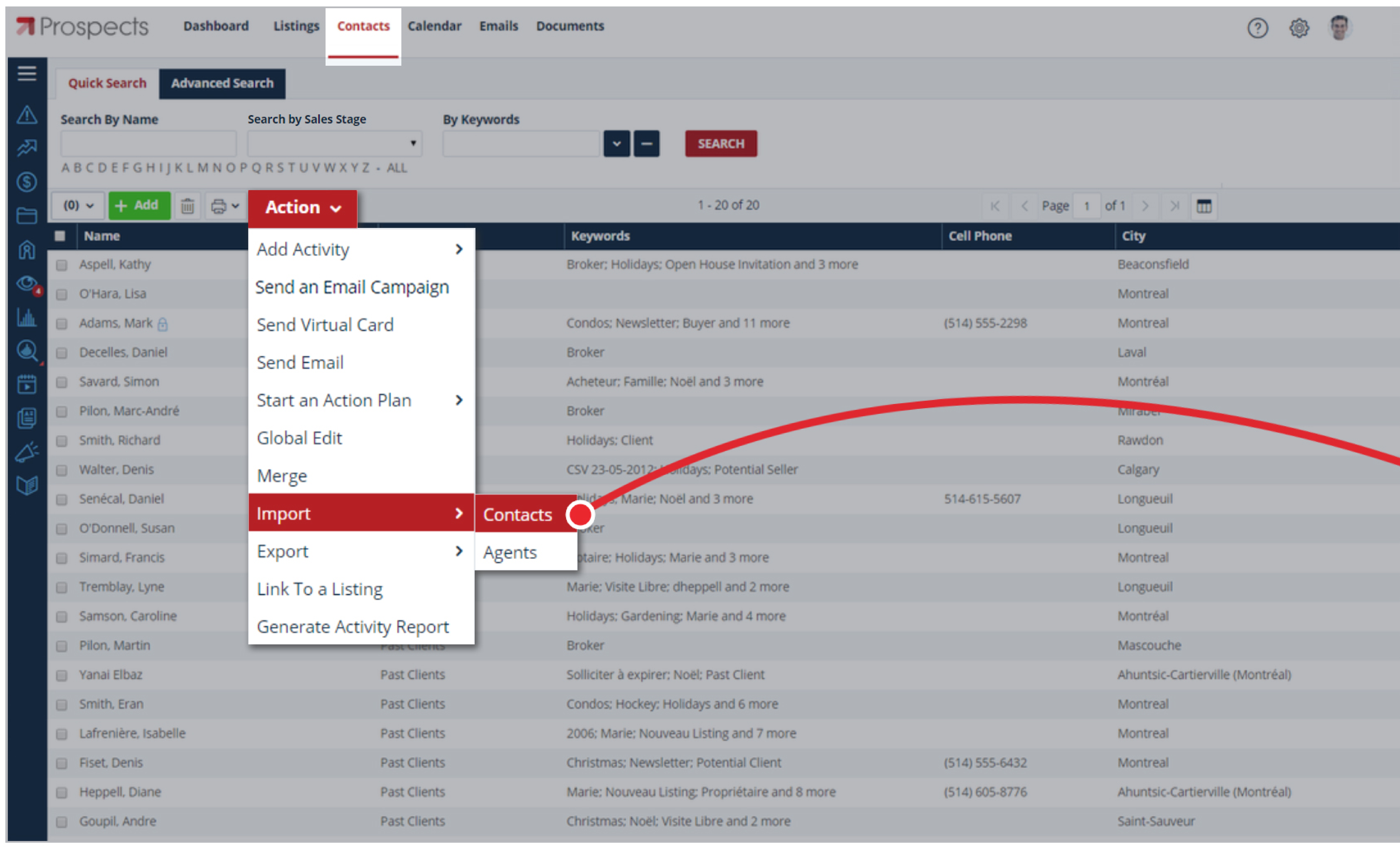
You can bookmark the **Login Page** for an even faster access to your CRM!

Import Your Contacts. All of Them. It's Quick and Easy!

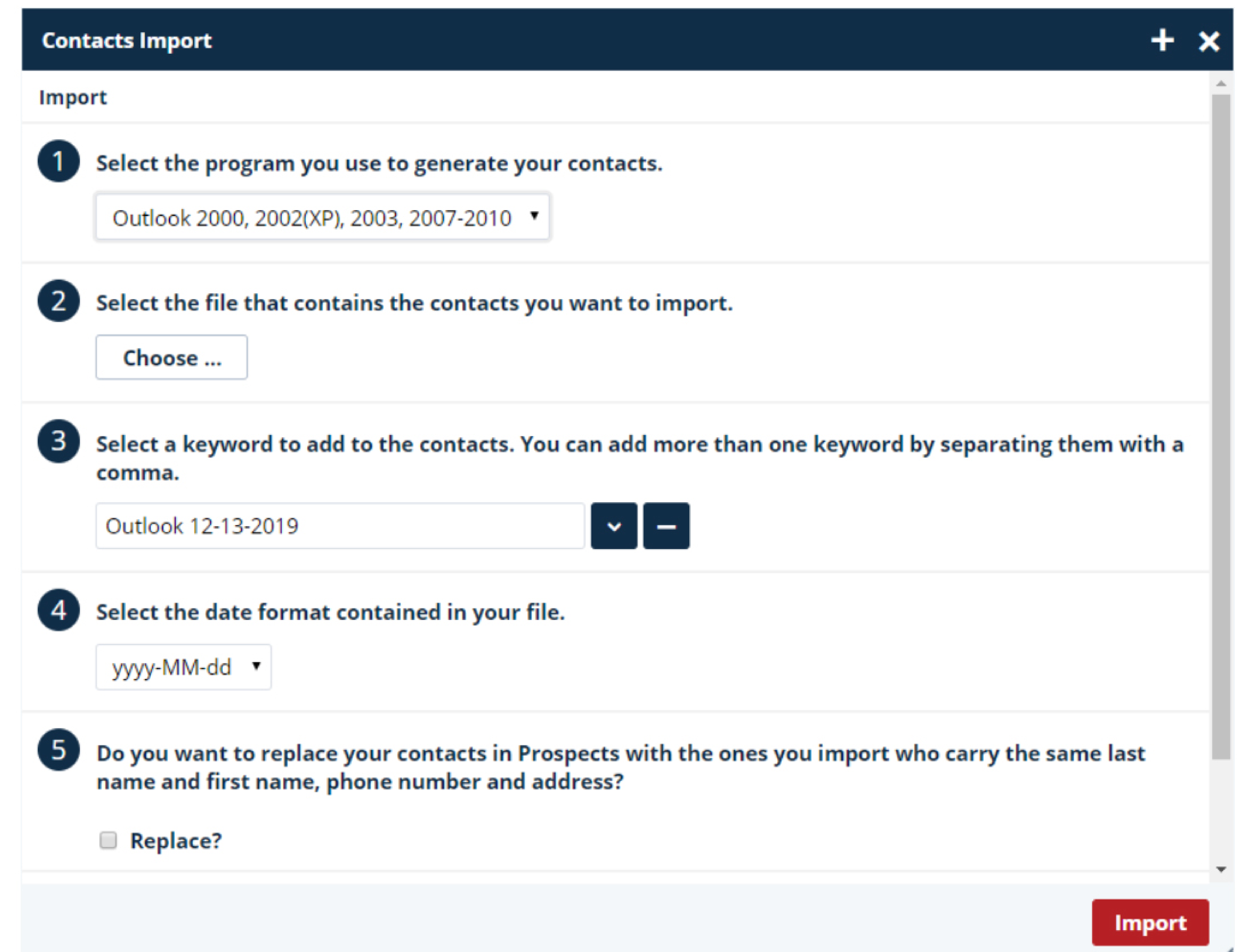
Taking advantage of all that Prospects CRM has to offer begins with contacts - that's why the most important step you can take is getting all your contacts imported and consolidated in one place.

DON'T FORGET

Always start by exporting or saving your contacts in a **CSV format** so you can import them in your CRM.



Contacts Manager



Contact Import

DID YOU KNOW?

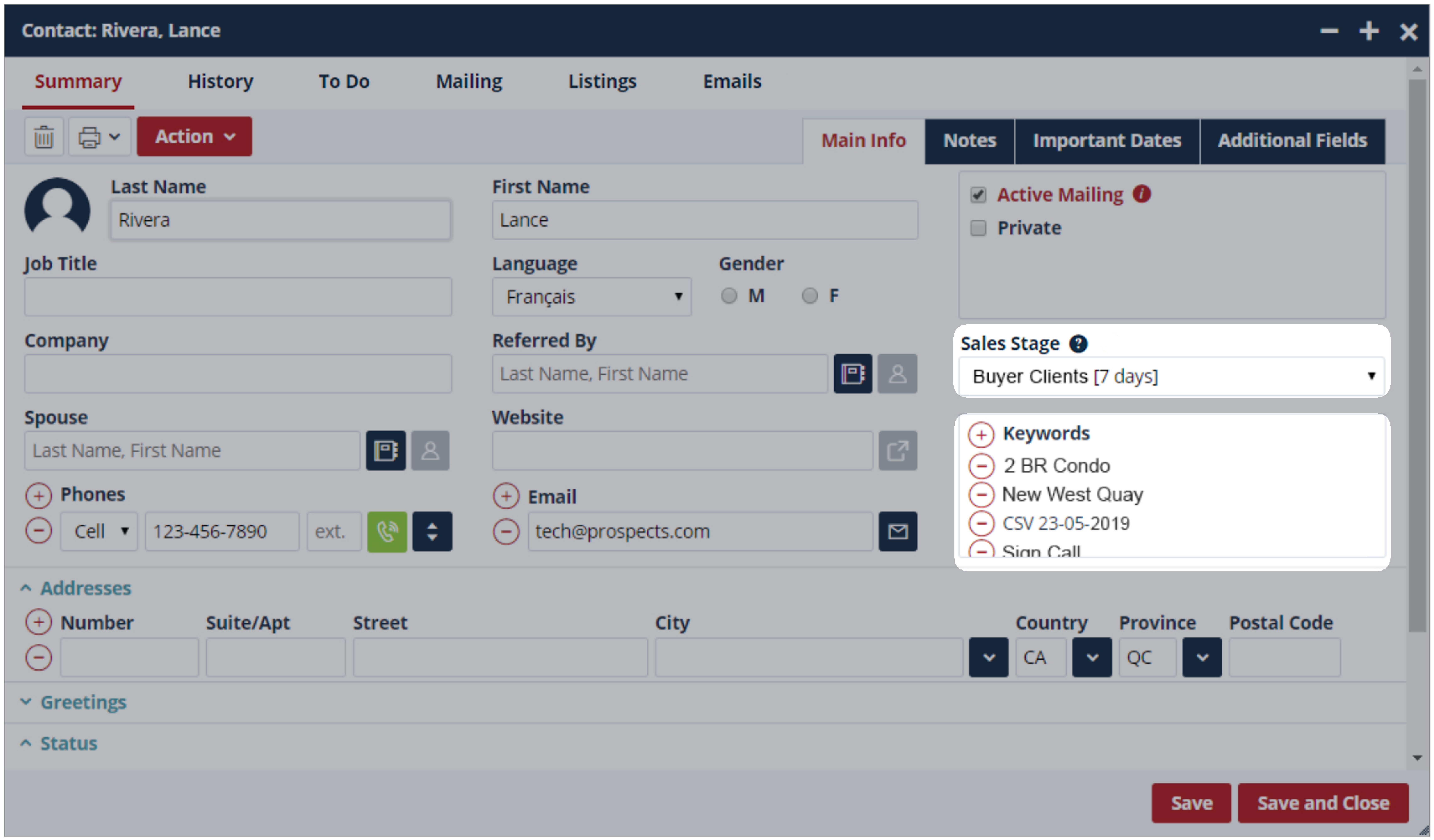
Have contacts in Matrix or MLS-Touch/Prospects Mobile?
The Matrix Integrations have them all sync instantly. Like magic!

Your contacts are on your phone and you're using MLS-Touch/Prospects Mobile?
You can simply import them from the application and they'll automatically sync to your CRM.

Organize and Segment Your Contacts (1/3)

Organizing your contacts is essential. Assigning a Sales Stage instantly puts Prospects CRM and your Virtual Assistant to work for you.

Adding Keywords allows you to further segment and target contacts so you can deliver the *right information* to the *right people* at the *right time*.



Contact Record

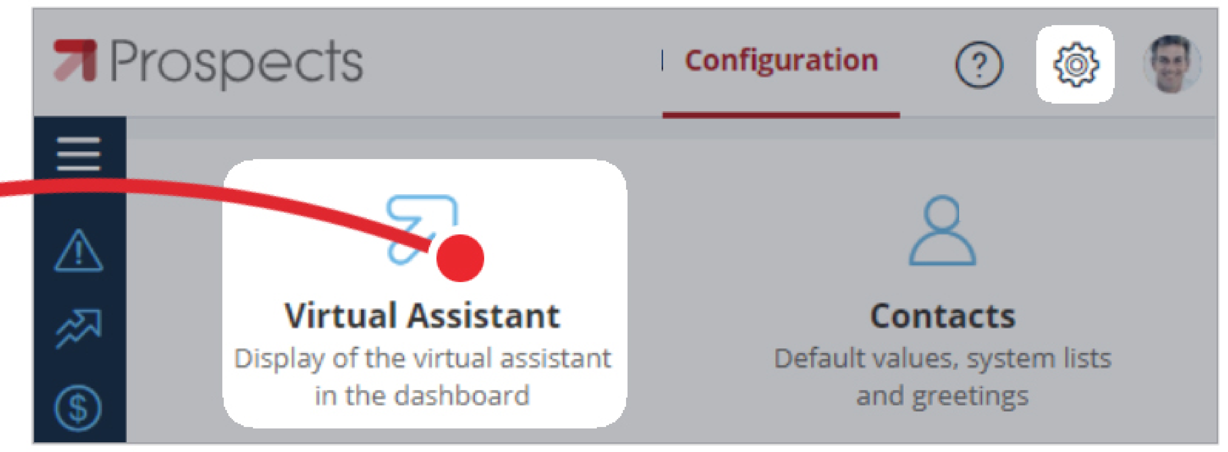
DON'T FORGET

Assigning a **Sales Stage** to your contacts instantly puts your CRM to work for you. Your CRM is smart enough to know when you need to touch-base with your client by the Follow-up Type you assign.

Increase the relevance and engagement of your marketing by adding **Keywords**. They are searchable and can be used to further segment and target contacts.

Organize and Segment Your Contacts (2/3)

You're in control of how you organize your contacts. Customize Sales Stages and Frequency to match the level of service you like to provide.

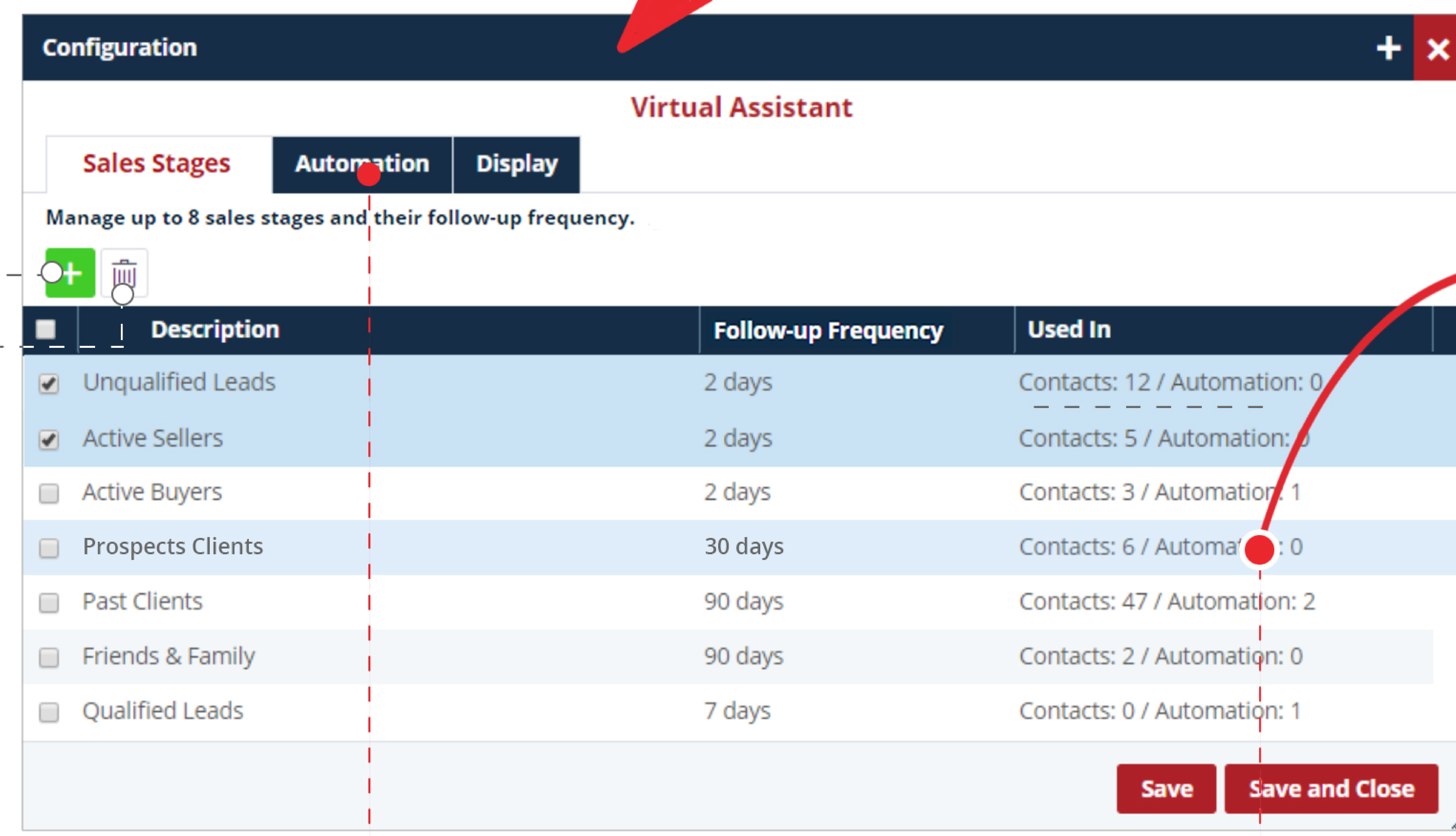


Configuration

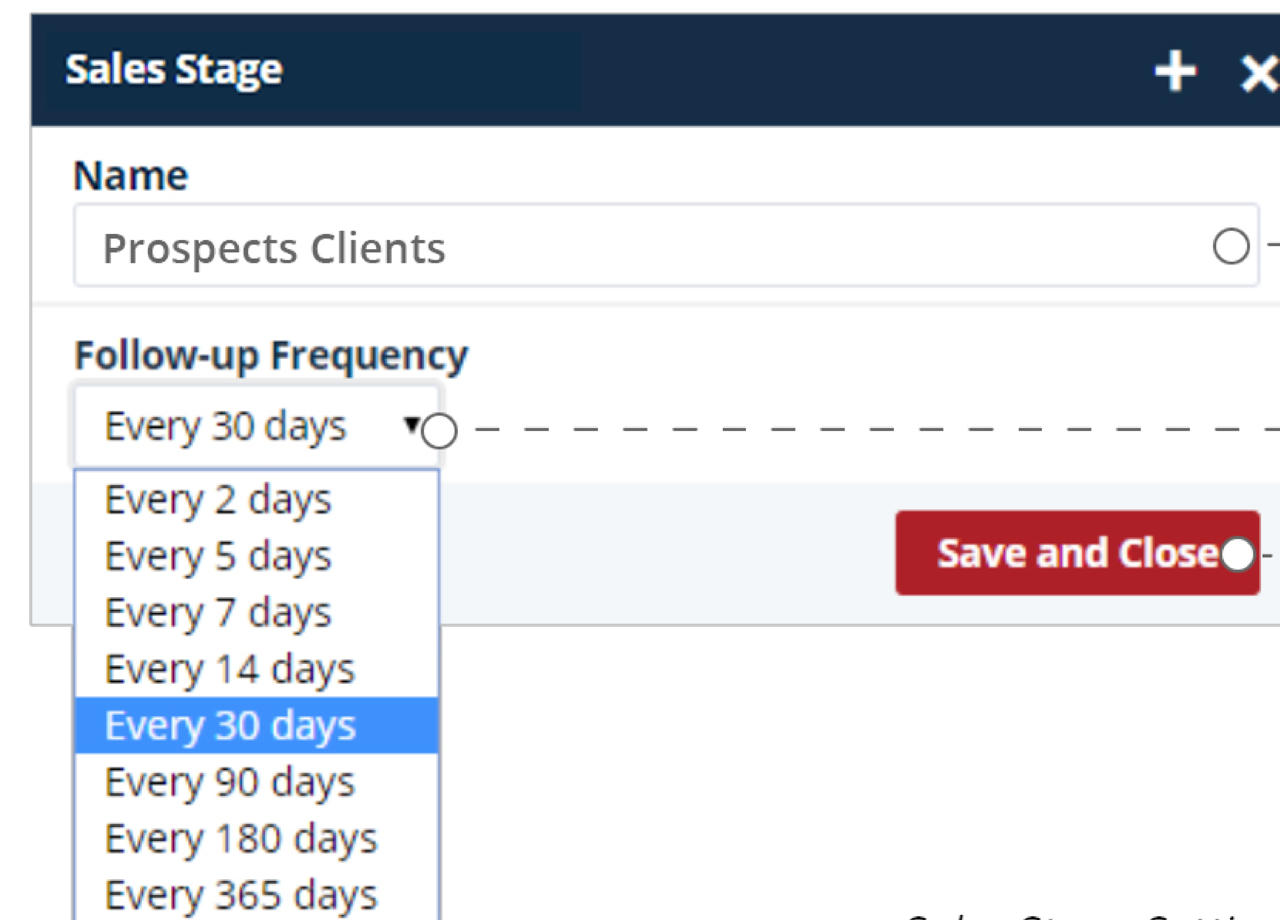
DON'T FORGET

You can customize your **Sales Stages** under the **Virtual Assistant** settings.

- Delete Selected Sales Stage
- Add Sales Stage



Virtual Assistant Configuration



Sales Stage Settings

- Save your Sales Stages
- Give a Name and Frequency to your New Sales Stage

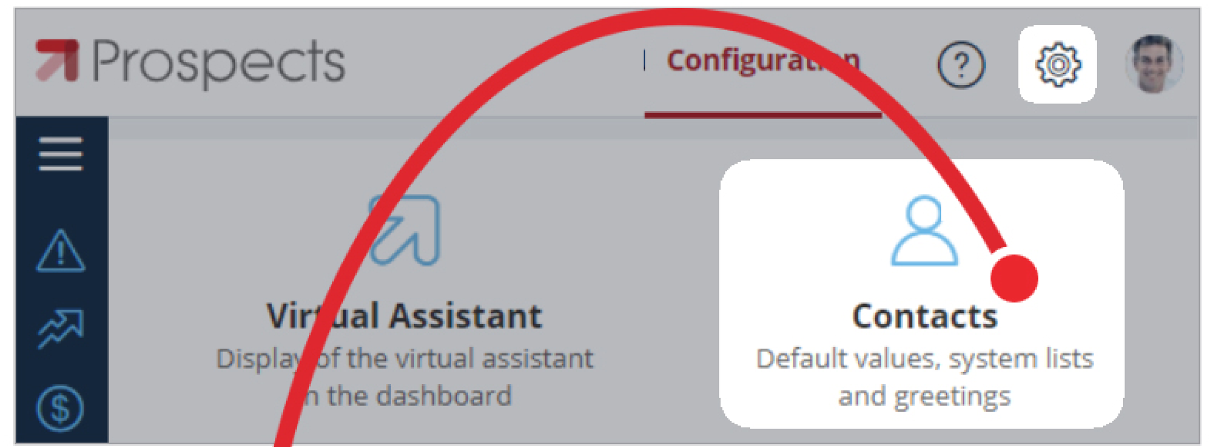
A new **Sales Stage** can be assigned to your contacts automatically in certain situations. You can determine which ones under the **Automation** tab.

You can double-click on an existing **Sales Stage** to modify it.

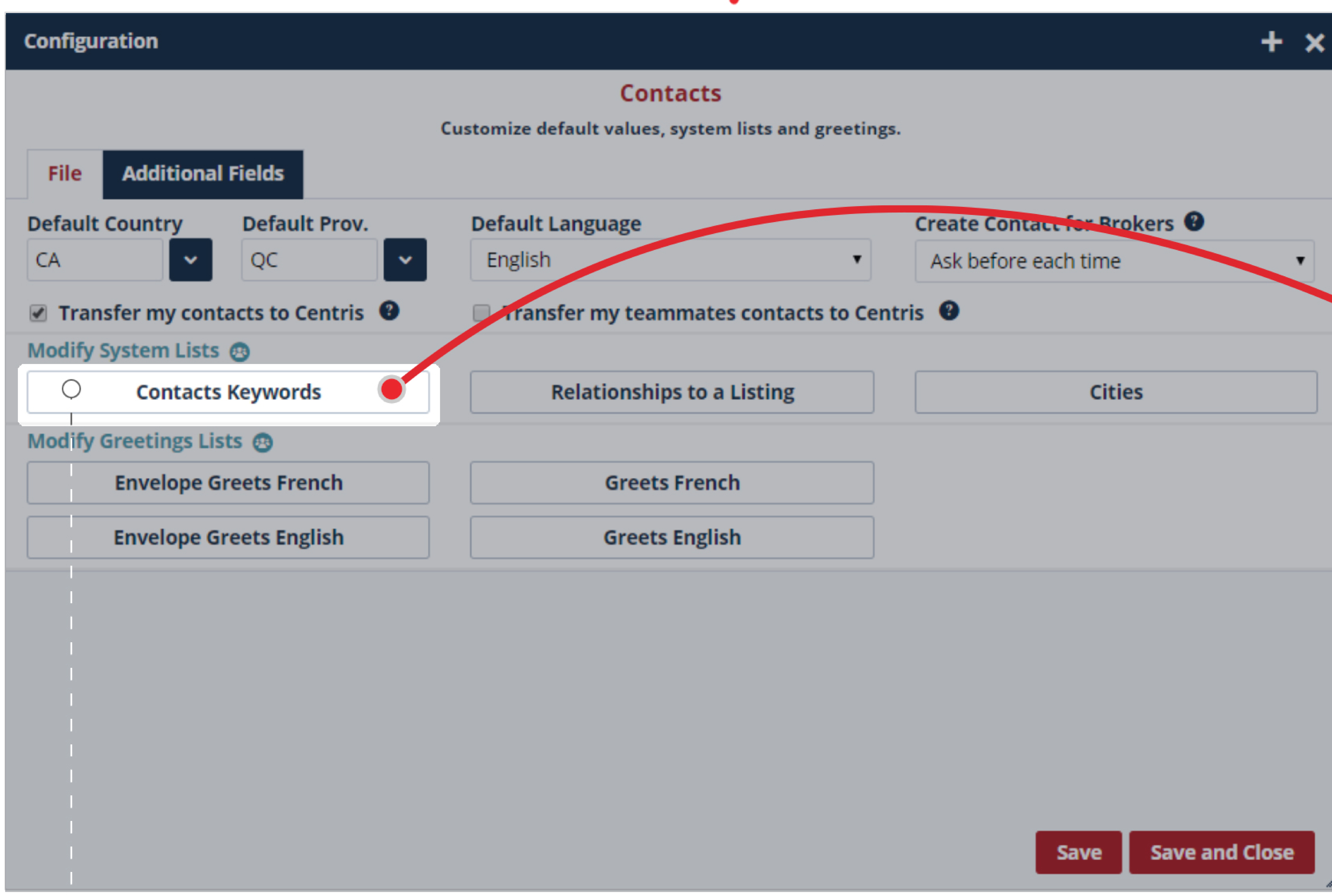
Organize and Segment Your Contacts (3/3)

DON'T FORGET

You can customize your **Keywords** under the **Contacts Manager** settings.



Configuration



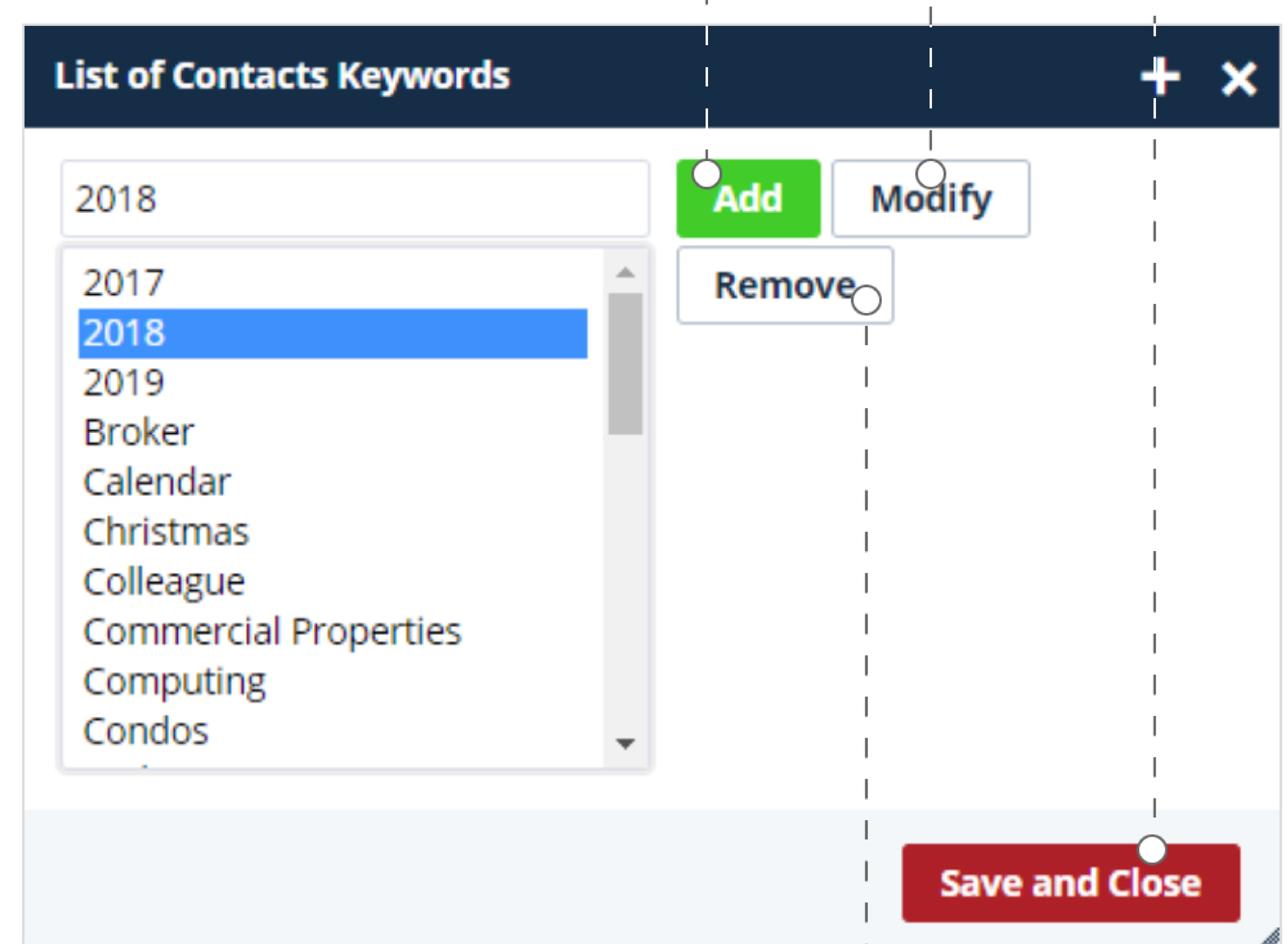
Contacts Manager Configuration

Manage Keywords

Save your Keywords

Rename Selected Keyword

Add a New Keyword



Keyword Manager

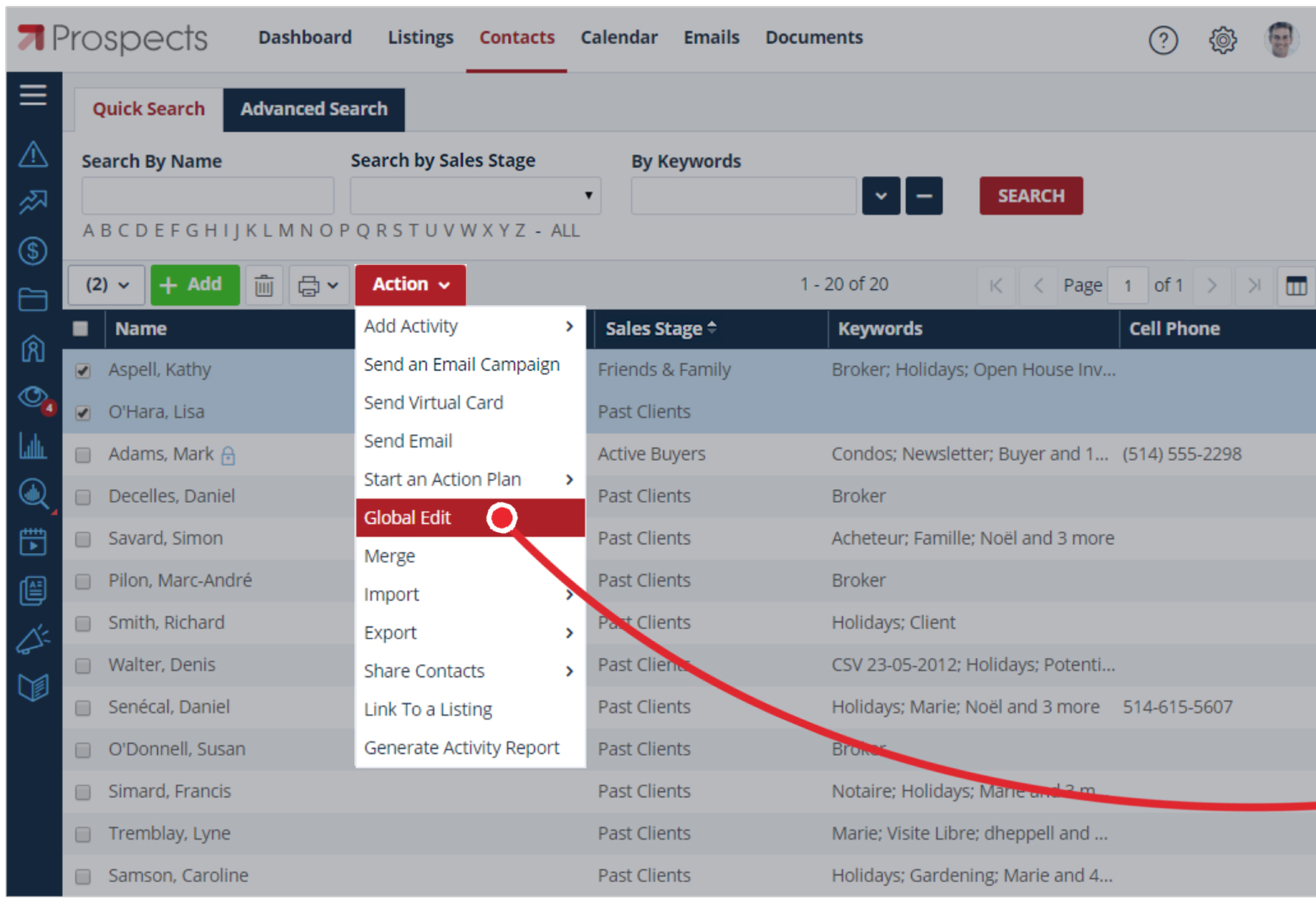
Remove Selected Keyword

DID YOU KNOW?

It's through the **Contacts Manager** settings that you can also customize your default contact record details, the content of additional drop-down menus as well as name your additional free fields and date fields.

Keep Your Database Up-To-Date Effortlessly

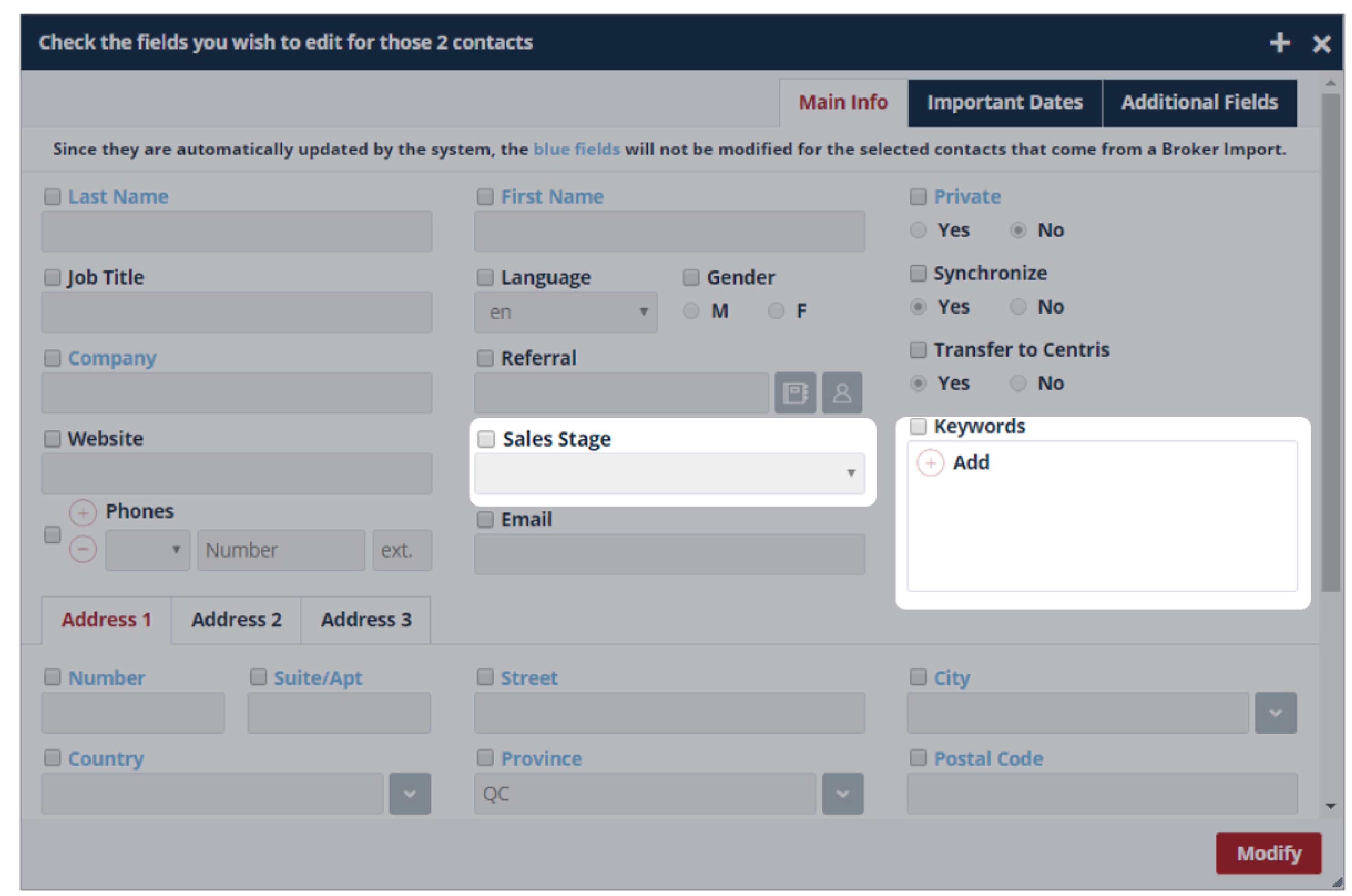
Use the **Global Edit** feature to assign a new Sales Stage or Keyword to multiple contacts simultaneously. It will save you a lot of time and effort!



Contacts Manager

DID YOU KNOW?

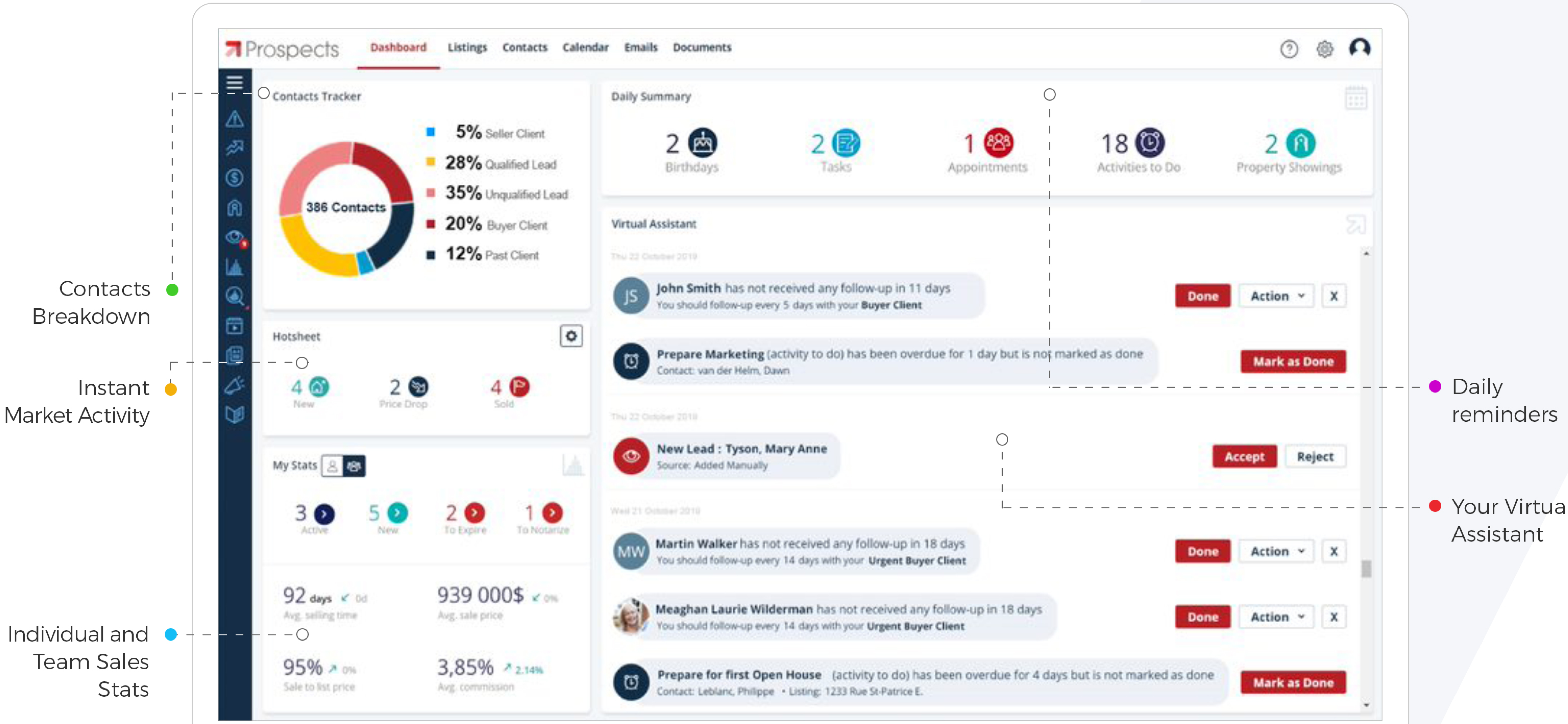
Global Edit allows you to update any information found in your records for multiple contacts at a time. Use it to maintain and clean up your database quickly!



Global Edit

Leverage Your Dashboard and Virtual Assistant to Focus on What Matters Most

The Dashboard enables you to take instant action on your highest priority opportunities. Review your new leads and manage your tasks, follow-ups, showings and more.



Dashboard

DID YOU KNOW?

Land on your **Dashboard** every time you log in by setting it as your **Homepage** from the **General** Configuration of your CRM. Type you assign.

Your **Virtual Assistant** will remind you when it's time to touch base with any of your contacts based on the **Sales Stage** you've assigned them!

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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