

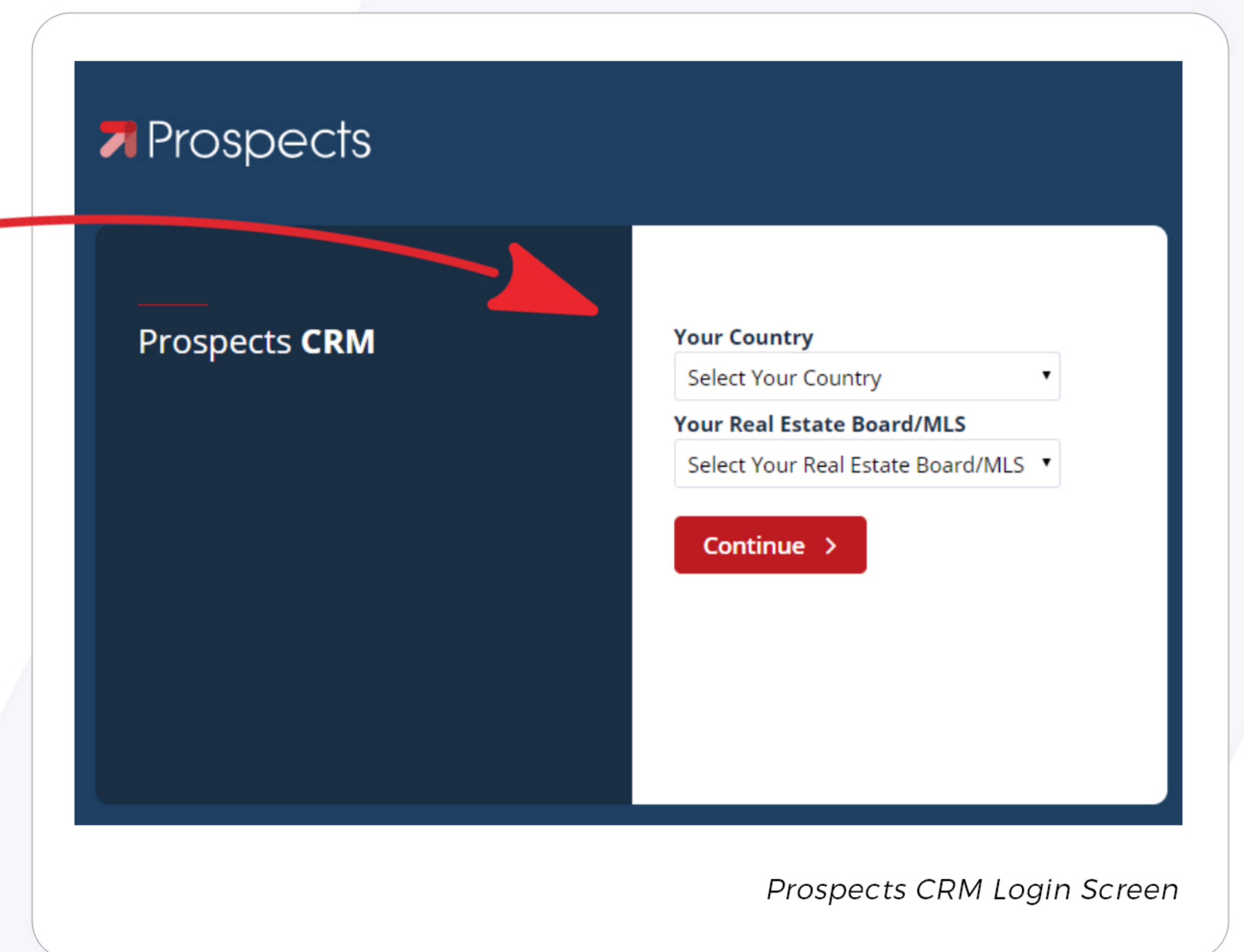
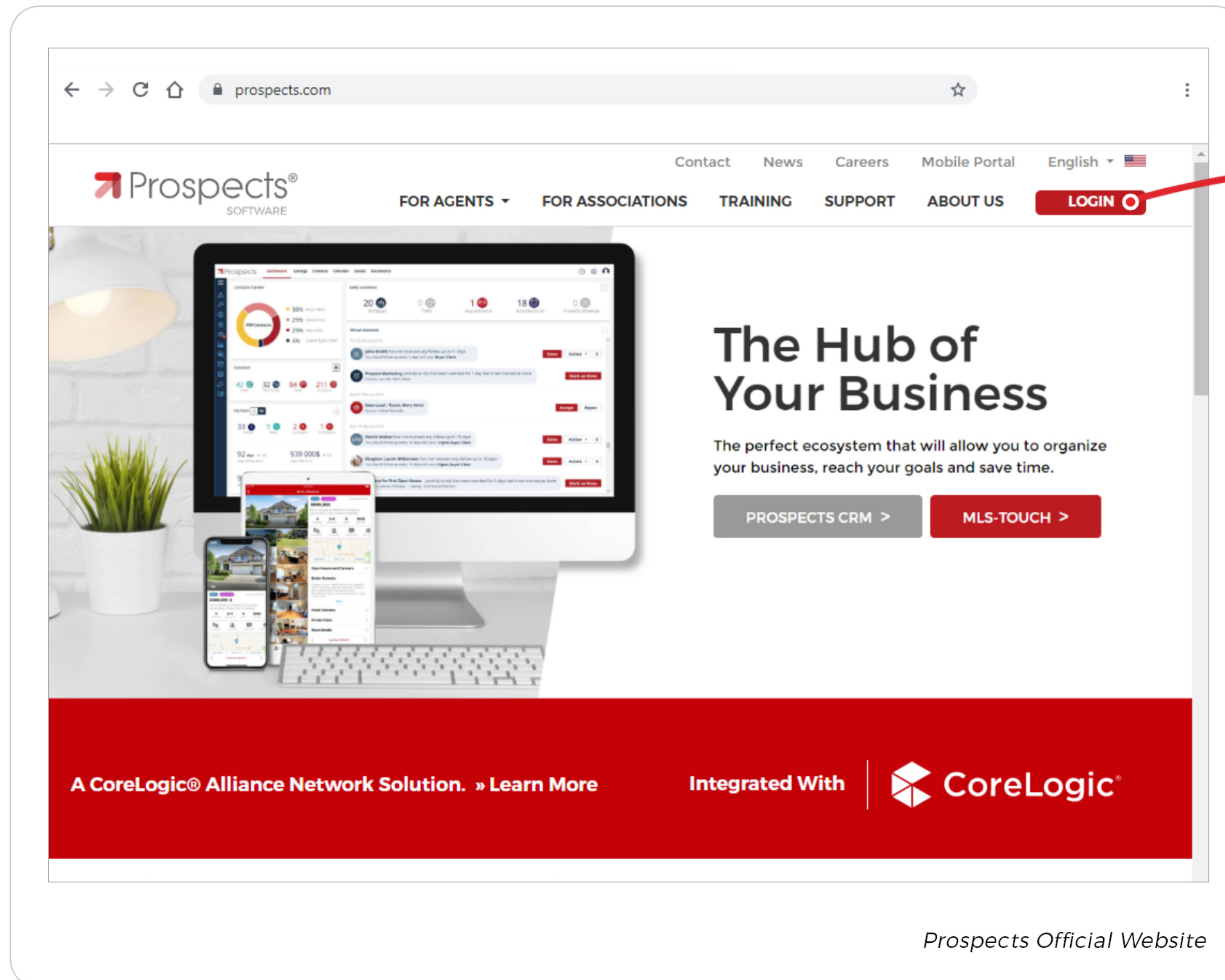


SET THE FOUNDATION  
TO GROW  
**YOUR BUSINESS**



# 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.



## 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: Rivera, Lance

Summary History To Do Mailing Listings Emails

Action Main Info Notes Important Dates Additional Fields

Last Name: Rivera First Name: Lance

Job Title: Language: Français Gender: M

Company: Referred By: Last Name, First Name

Spouse: Last Name, First Name Website:

Phones: Cell 123-456-7890 Email: tech@prospects.com

Addresses: Number Suite/Apt Street City Country: CA Province: QC Postal Code

Greetings Status

Save Save and Close

Contact Record

## DON'T FORGET

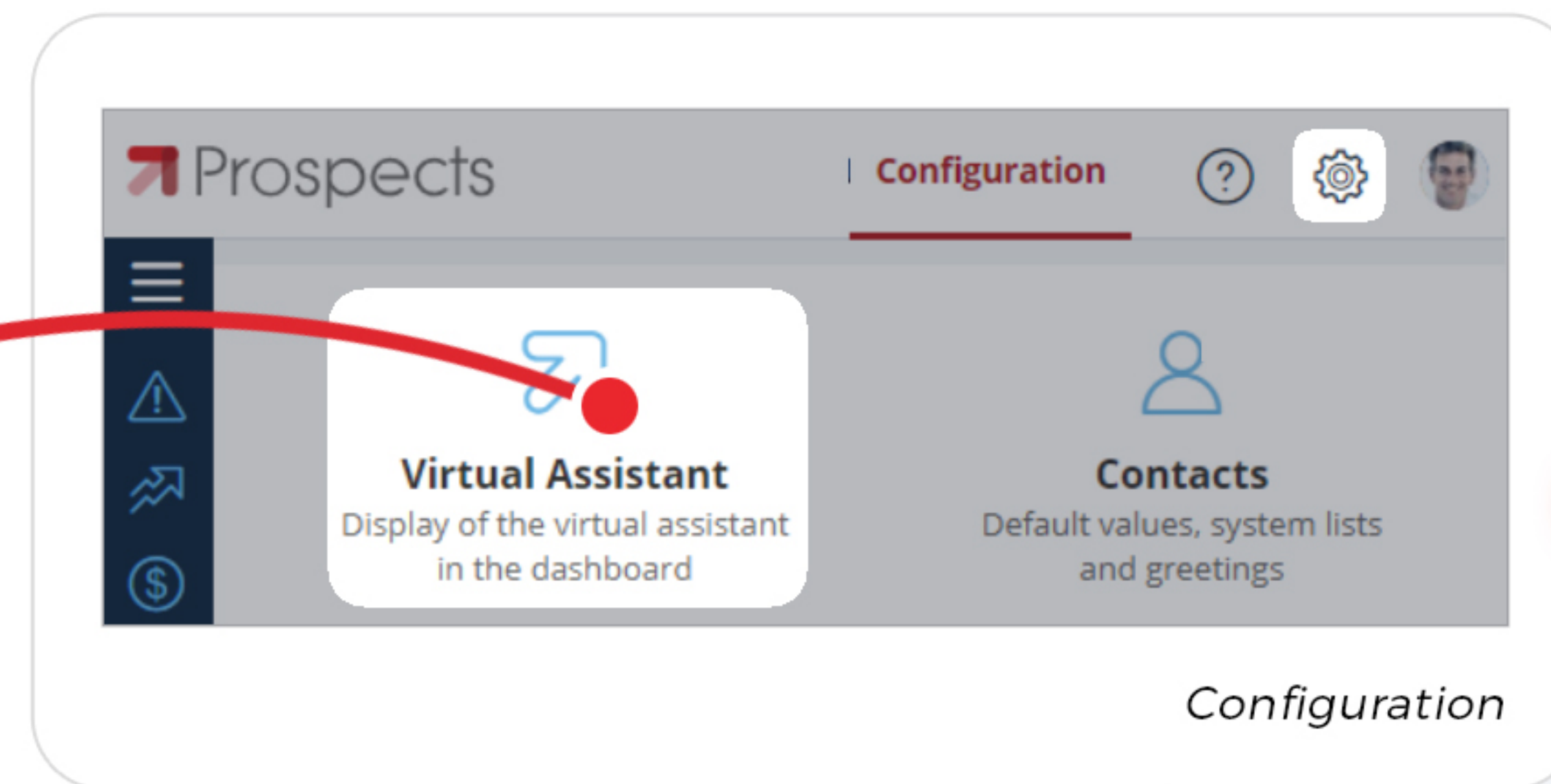
Assigning a **Sales Stage** to your contacts instantly puts your CRM to work for you. Your CRM is smart enough to know when you need to touch-base with your client by the Follow-up Type you assign.

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.



## DON'T FORGET

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

● Delete Selected Sales Stage

● Add Sales Stage

Configuration

Virtual Assistant

Sales Stages Automation Display

Manage up to 8 sales stages and their follow-up frequency.

Description	Follow-up Frequency	Used In
<input checked="" type="checkbox"/> Unqualified Leads	2 days	Contacts: 12 / Automation: 0
<input checked="" type="checkbox"/> Active Sellers	2 days	Contacts: 5 / Automation: 0
<input type="checkbox"/> Active Buyers	2 days	Contacts: 3 / Automation: 1
<input type="checkbox"/> Prospects Clients	30 days	Contacts: 6 / Automation: 0
<input type="checkbox"/> Past Clients	90 days	Contacts: 47 / Automation: 2
<input type="checkbox"/> Friends & Family	90 days	Contacts: 2 / Automation: 0
<input type="checkbox"/> Qualified Leads	7 days	Contacts: 0 / Automation: 1

Save Save and Close

Virtual Assistant Configuration

Sales Stage

Name

Prospects Clients

Follow-up Frequency

Every 30 days

Every 2 days

Every 5 days

Every 7 days

Every 14 days

Every 30 days

Every 90 days

Every 180 days

Every 365 days

Save and Close

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.

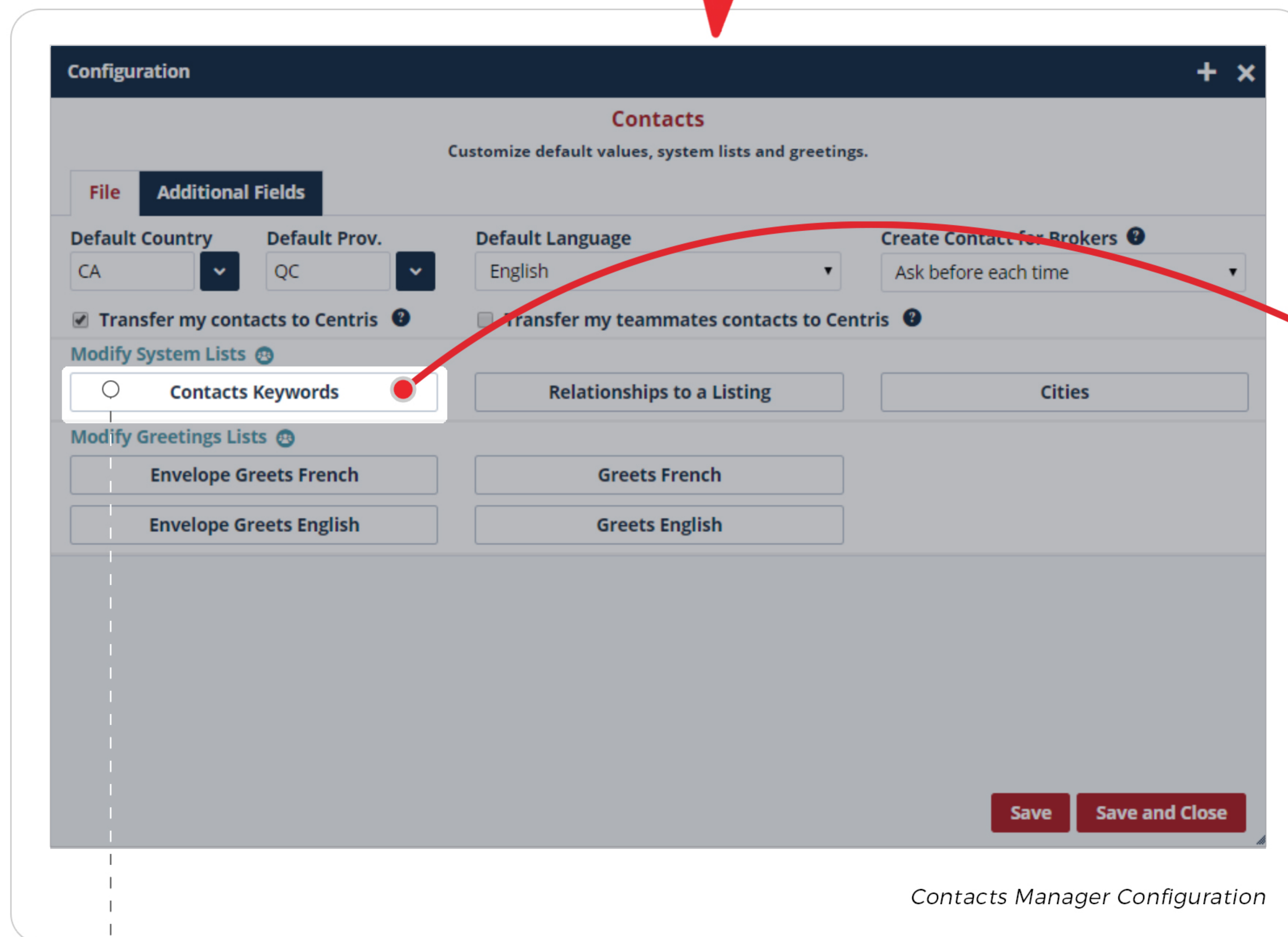
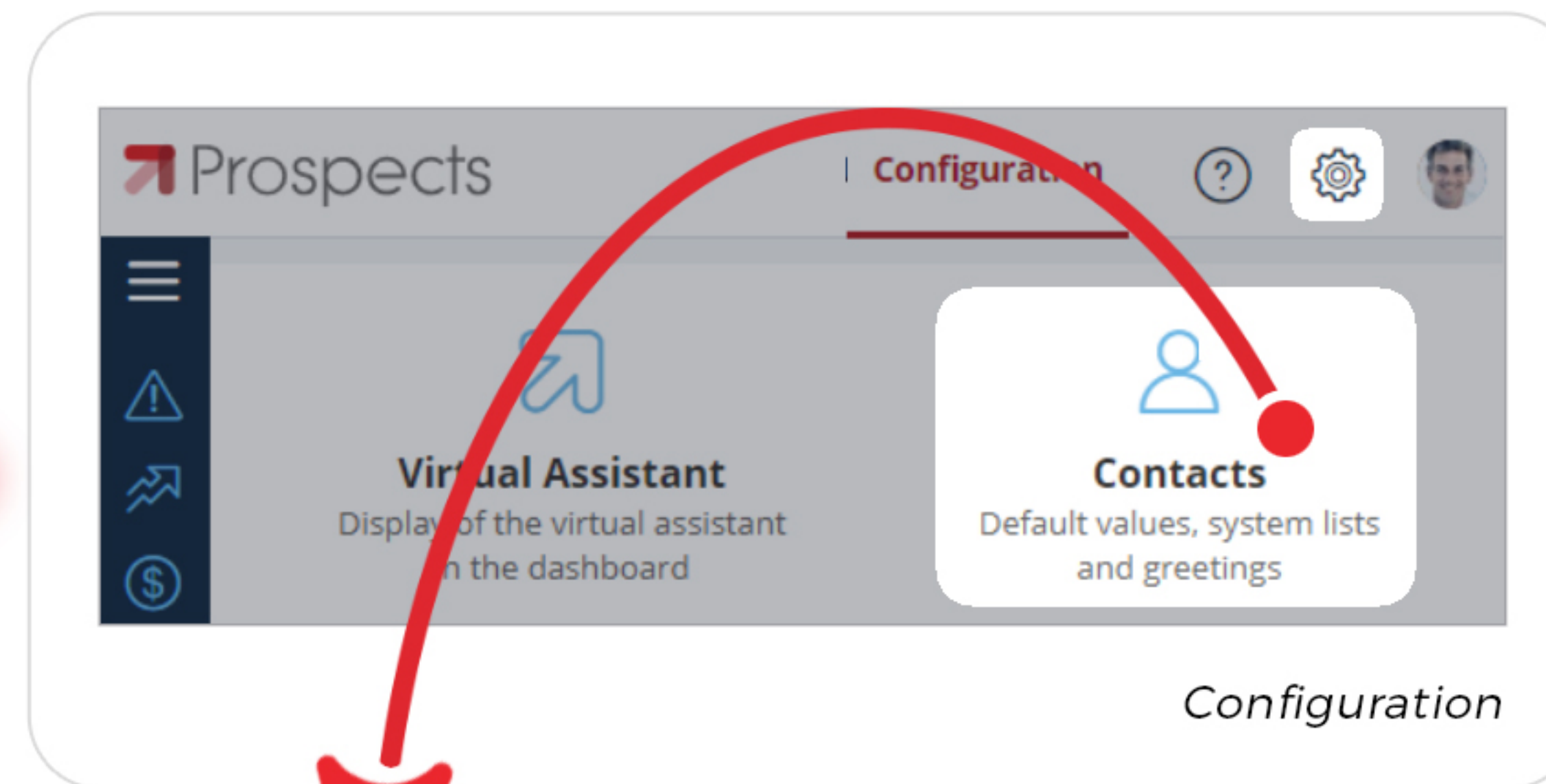
You can double-click on an existing **Sales Stage** to modify it.



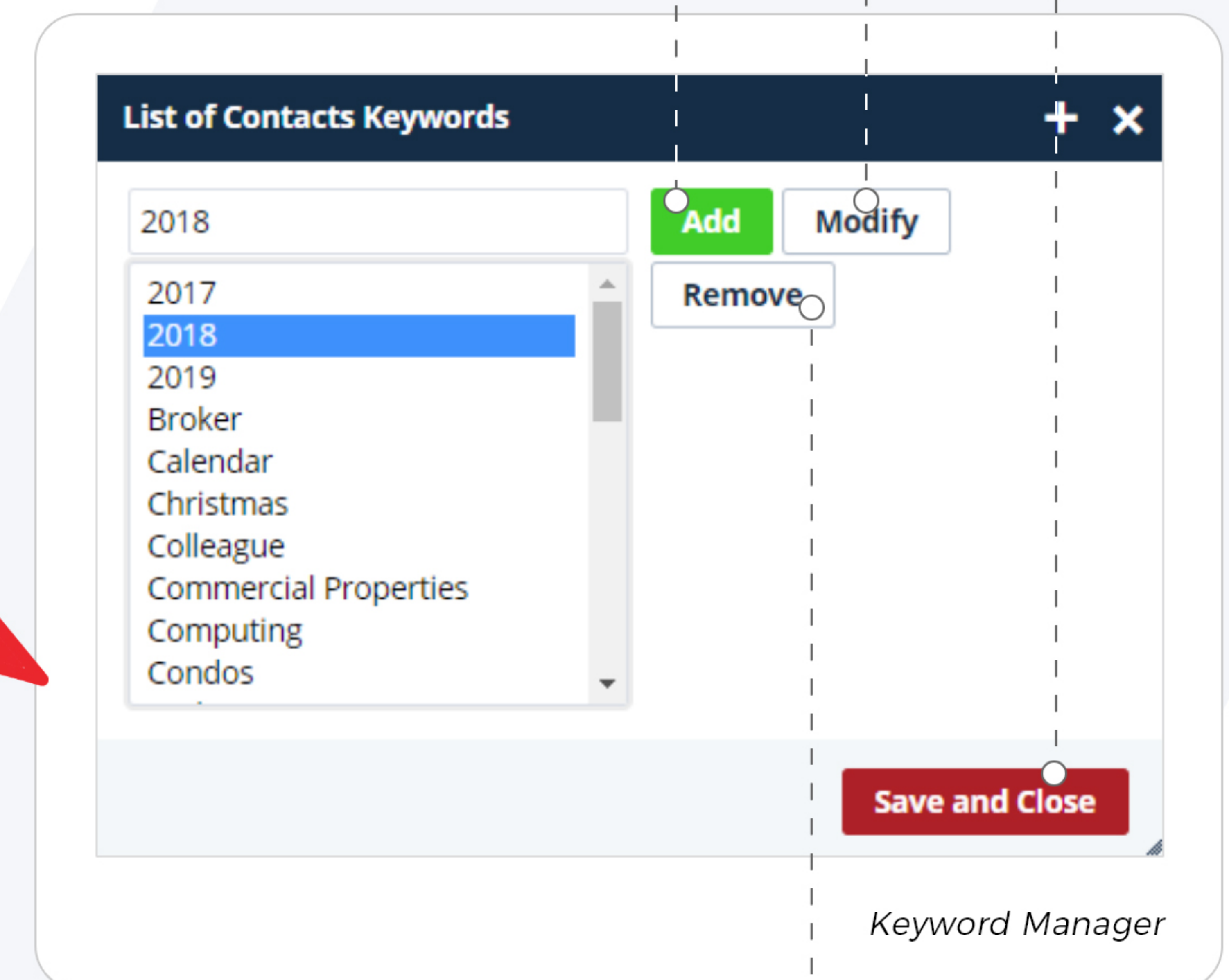
# Organize and Segment Your Contacts (3/3)

## DON'T FORGET

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



- Save your Keywords ●
- Rename Selected Keyword ●
- Add a New Keyword ●



- Remove Selected Keyword ●

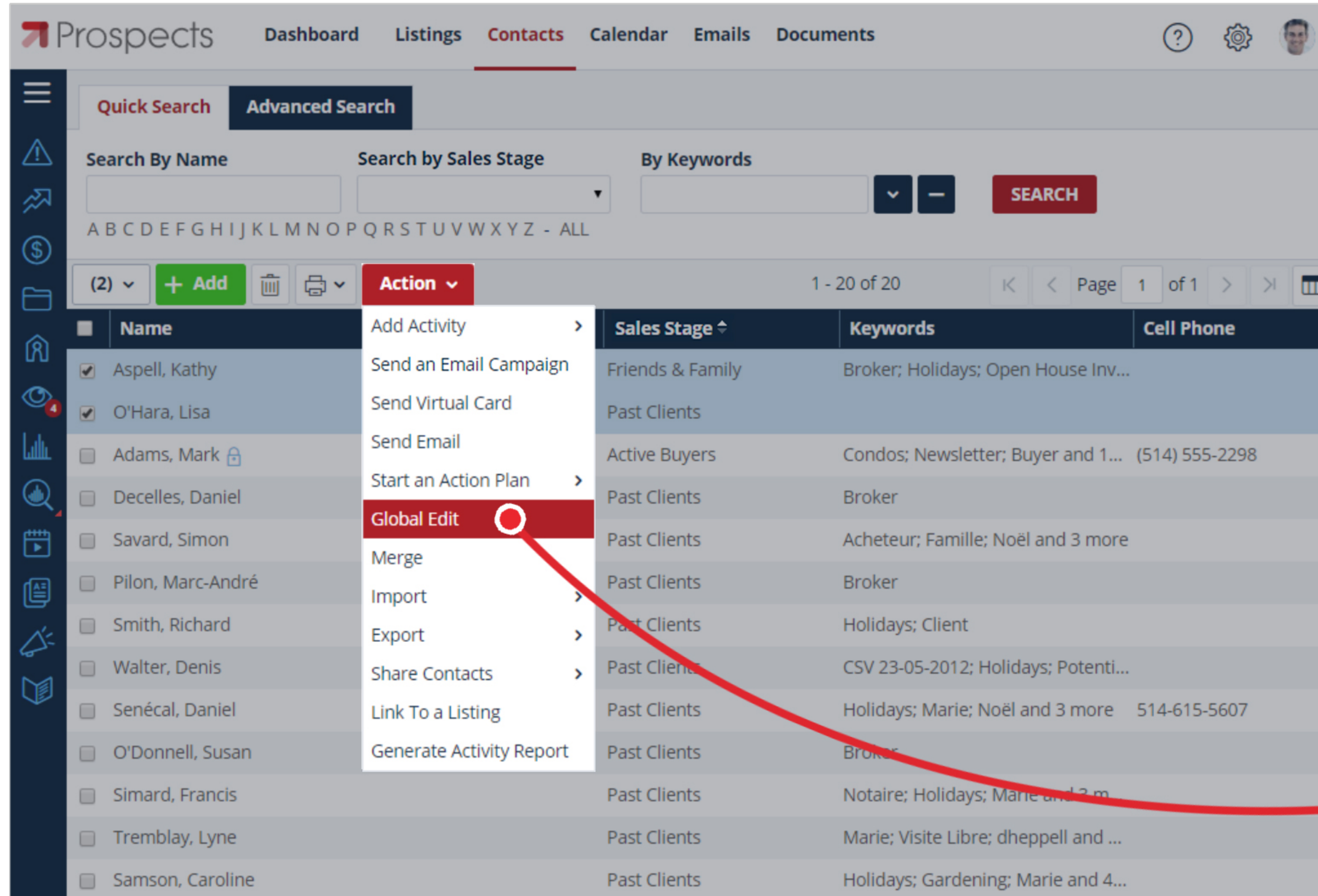
## DID YOU KNOW?

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

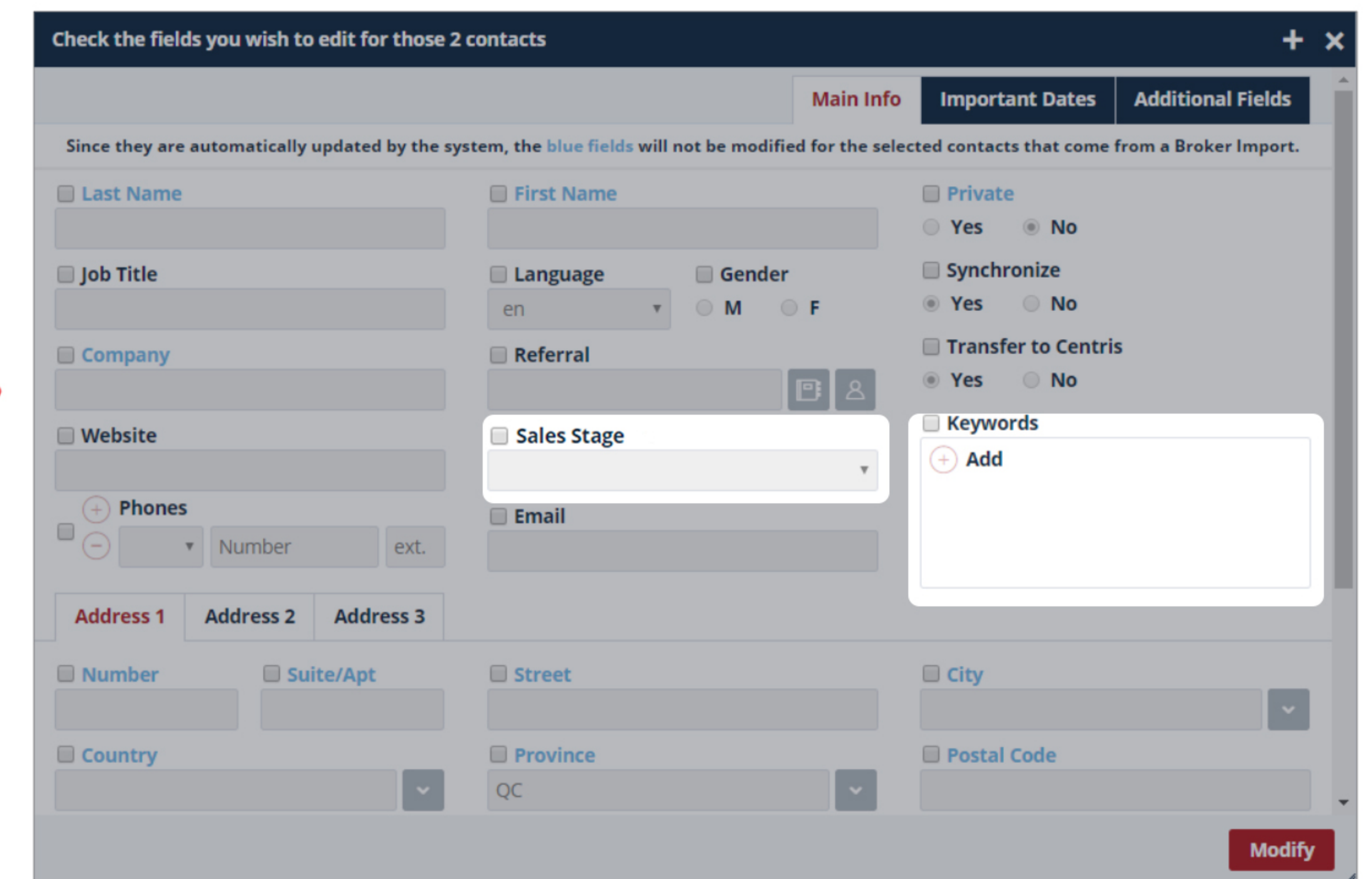
Use the **Global Edit** feature to assign a new Sales Stage or Keyword to multiple contacts simultaneously. It will save you a lot of time and effort!



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.

The screenshot shows the Prospects CRM Dashboard with the following components and callouts:

- Contacts Breakdown:** A donut chart showing 386 contacts categorized by client type: 5% Seller Client, 28% Qualified Lead, 35% Unqualified Lead, 20% Buyer Client, and 12% Past Client.
- Instant Market Activity:** A section showing 4 New, 2 Price Drop, and 4 Sold properties.
- Individual and Team Sales Stats:** Metrics including 92 days Avg. selling time, 939 000\$ Avg. sale price, 95% Sale to list price, and 3,85% Avg. commission.
- Daily Summary:** Overview of 2 Birthdays, 2 Tasks, 1 Appointment, 18 Activities to Do, and 2 Property Showings.
- Virtual Assistant:** A list of reminders and tasks, such as "John Smith has not received any follow-up in 11 days" and "Prepare Marketing (activity to do) has been overdue for 1 day".

Callouts on the left side of the dashboard:

- Contacts Breakdown (green dot)
- Instant Market Activity (yellow dot)
- Individual and Team Sales Stats (blue dot)

Callouts on the right side of the dashboard:

- Daily reminders (purple dot)
- Your Virtual Assistant (red dot)

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](mailto: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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