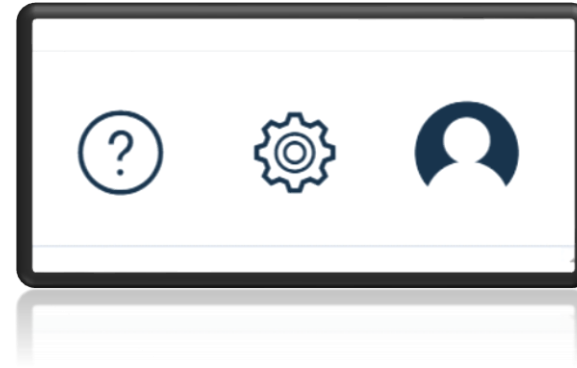



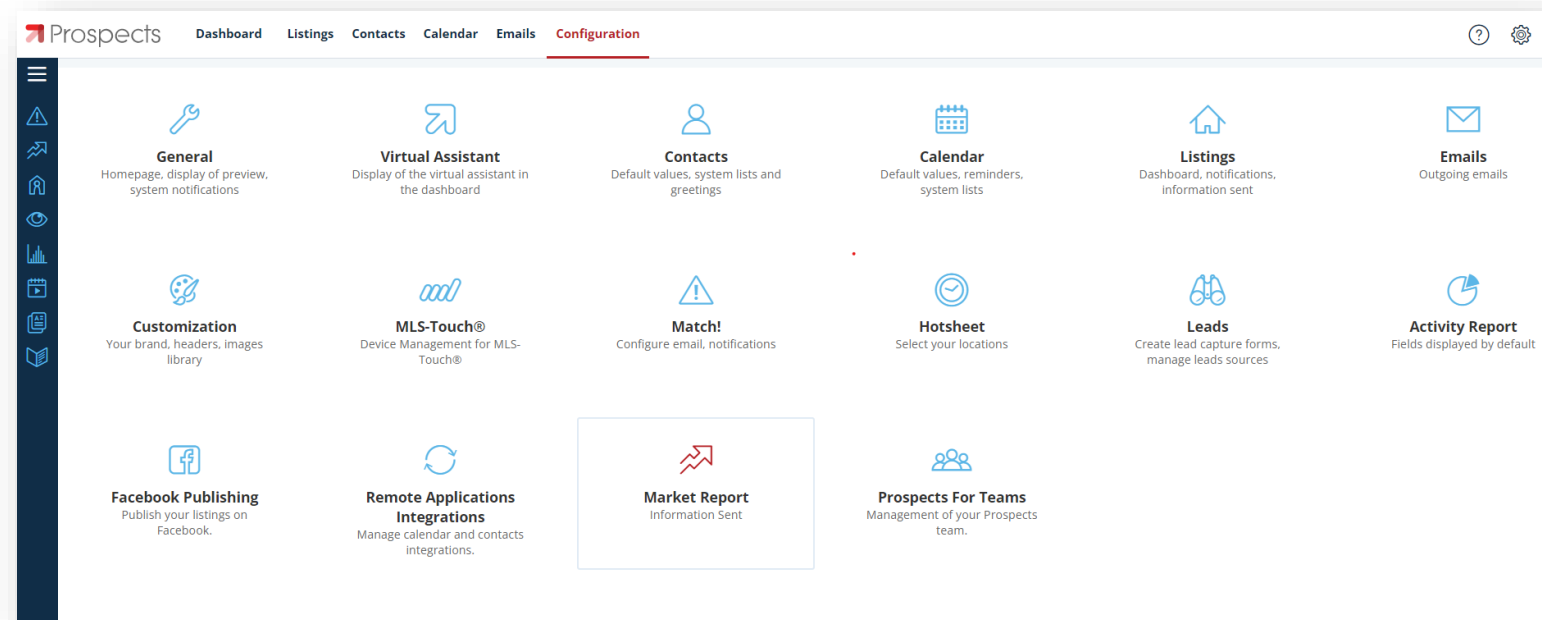
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How to access the configuration of your software

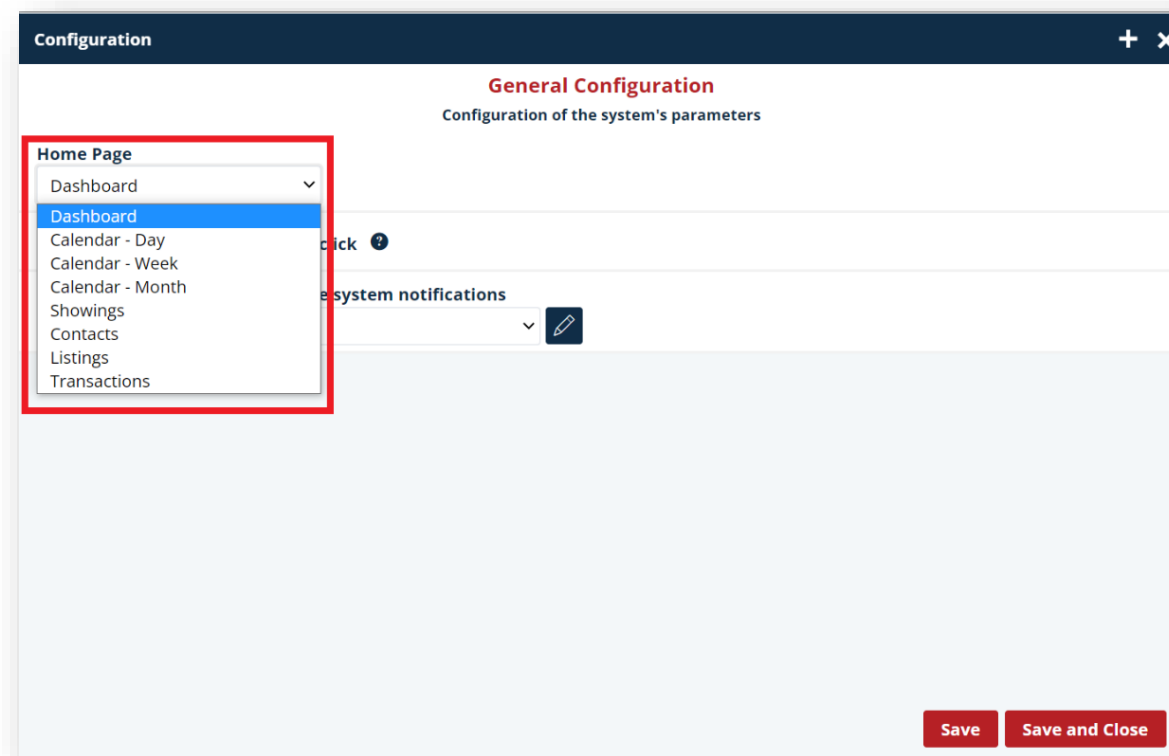
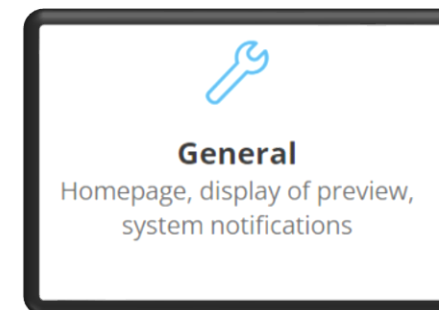


- From the  menu located in the upper right corner of your software, you can access the configuration of your software.



General

- You can select the default landing page that will display when you log in your *Prospects CRM* account.
- Click the **Home Page** drop-down menu and select the page of your choice.

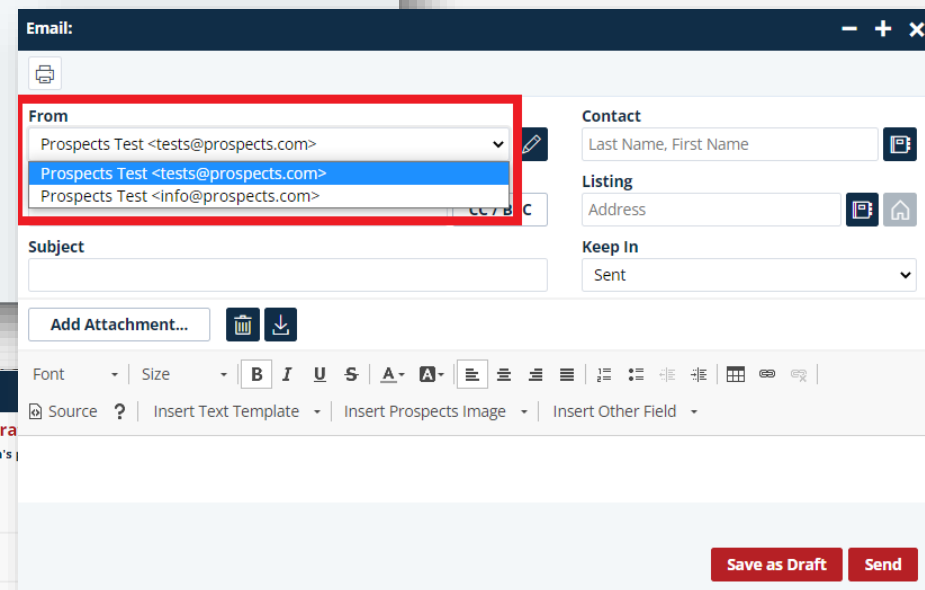
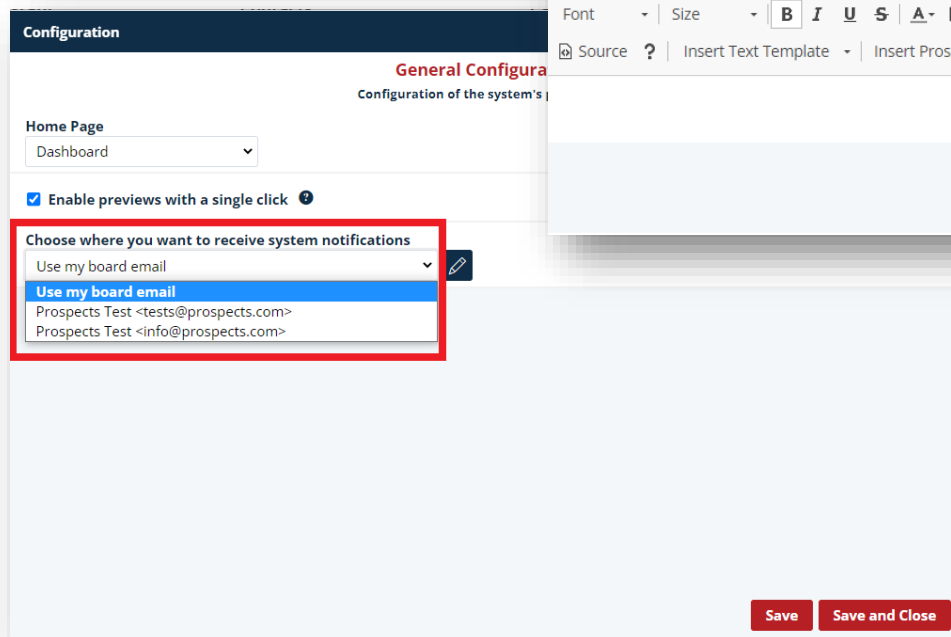
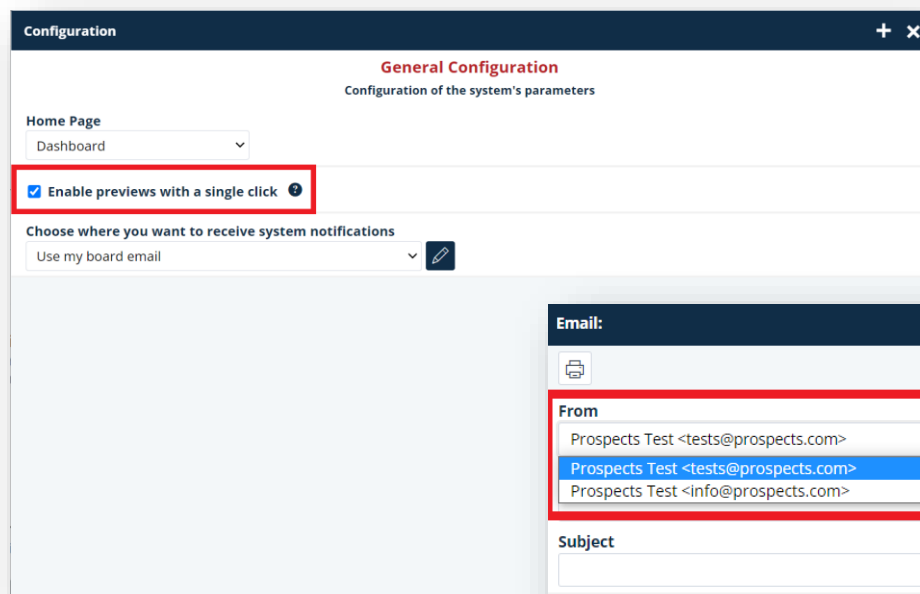


1. The next feature allows you to display a preview with a single click on items like the Contact Files, Listings Files, Transactions, Reports, Activities, etc.

2. Next, choose where you would like to receive *Prospects* notifications. Emails will also be used in the various functions of the application.

3. Click on the drop-down menu to select the desired email.

4. Save your changes by clicking the red **Save** or **Save and Close** button.



Virtual Assistant

- Your *Prospects CRM* comes with *Sales Stages* configured and ready to use. You can easily change them according to your preferences. A maximum of eight *Sales Stages* are permitted.
- Double click on the *Sales Stage* you want to modify. Customize the name or frequency, then click **Save and Close**.



Configuration

Virtual Assistant

Sales Stages Automation Display

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

Name	Follow-up Frequency	Contacts	Automation
<input type="checkbox"/> Qualified - Short term	11 / Automation: 0		
<input type="checkbox"/> Qualified - Medium term	1 / Automation: 0		
<input type="checkbox"/> Qualified - Long term	23 / Automation: 0		
<input type="checkbox"/> Non-qualified Lead	8 / Automation: 2		
<input type="checkbox"/> Solicitation	113 / Automation: 2		
<input type="checkbox"/> Active Seller	7 days	Contacts: 21 / Automation: 1	
<input type="checkbox"/> Active Buyer	7 days	Contacts: 13 / Automation: 1	
<input type="checkbox"/> Past Client	90 days	Contacts: 1 / Automation: 0	

Save Save and Close

1. To add a new one, click on the “+” icon. The **Name** and **Follow-up Frequency** can then be added.
 2. The trash can icon allows you to delete the **Sales Stage** you have previously selected.
 3. Save your changes by clicking on **Save** or **Save and Close**.
- Note that if you are part of a team, only the administrator can modify the **Sales Stages**.

The image displays three sequential screenshots of the 'Virtual Assistant' configuration interface, illustrating the steps to manage sales stages.

Screenshot 1: Shows the 'Sales Stages' tab. A red box highlights the green '+' icon and the trash can icon, with a red '1' next to the '+' icon. A modal window titled 'Sales Stage' is open, showing a 'Name' input field and a 'Follow-up Frequency' dropdown menu set to 'Every 30 days'. A 'Save and Close' button is visible at the bottom of the modal.

Screenshot 2: Shows the 'Sales Stages' tab with a table of existing stages. A red box highlights the '+' and trash can icons, with a red '2' next to the trash can icon. The table lists stages with their follow-up frequencies and usage statistics.

Name	Follow-up Frequency	Used In
<input type="checkbox"/> Qualified - Short term	5 days	Contacts: 11 / Automation: 0
<input type="checkbox"/> Qualified - Medium term	14 days	Contacts: 1 / Automation: 0
<input type="checkbox"/> Qualified - Long term	30 days	Contacts: 23 / Automation: 0
<input type="checkbox"/> Non-qualified Lead	2 days	Contacts: 8 / Automation: 2
<input type="checkbox"/> Solicitation	30 days	Contacts: 113 / Automation: 2
<input type="checkbox"/> Active Seller	7 days	Contacts: 21 / Automation: 1
<input type="checkbox"/> Active Buyer	7 days	Contacts: 13 / Automation: 1
<input type="checkbox"/> Past Client	90 days	Contacts: 1 / Automation: 0

Screenshot 3: Shows the 'Sales Stages' tab with the same table as in Screenshot 2. A red box highlights the 'Save' and 'Save and Close' buttons at the bottom right, with a red '3' next to the 'Save' button. A red arrow points to the 'Save' button.

1. Automation options for the sales stage are available in the second tab. Assign the *Sales Stage* that will be automatically assigned to a contact depending on various situation.
2. When **Adding a Contact** file, when **Importing a Contact** and when **Accepting a Lead**.
3. When you are **Fulfilling Transaction Conditions** or **Creating a showing**.
4. Under the **Display** tab, you can customize the items you wish to see in your **Virtual Assistant**, on the **Dashboard**.
5. Simply activate/deactivate the options with the toggle buttons on the left. Use the drop-down menus on the right to choose your options.
6. When you're done, click **Save and Close**.

1

Configuration Virtual Assistant

Sales Stages Automation Display

Manage how the virtual assistant changes automatically the sales stages of your contacts.

Set this sales stage when

Adding a Contact Non-qualified Lead [2 days]

Adding Notary/Broker Active Seller [7 days]

Importing a Contact Solicitation [30 days]

Accepting a Lead Non-qualified Lead [2 days]

Set this sales stage to linked contacts when

Fulfilling Transaction Conditions Solicitation [30 days]

Creating a Showing Active Buyer [7 days]

Configuration Virtual Assistant

Sales Stages Automation Display

Manage how the virtual assistant changes automatically the sales stages of your contacts.

Set this sales stage when

Adding a Contact Non-qualified Lead [2 days]

Adding Notary/Broker Not Followed

Importing a Contact Past Client [90 days]

Accepting a Lead Non-qualified Lead [2 days]

Set this sales stage to linked contacts when

Fulfilling Transaction Conditions Past Client [90 days]

Creating a Showing Active Buyer [7 days]

Configuration Virtual Assistant

Sales Stages Automation Display

Manage what is displayed by your virtual assistant.

5

My new leads

My contacts' follow-ups

My today's and overdue activities

My showings without a showing result

Only show contacts with this keyword No Filters

Only show activities of the past 6 months

6

Save Save and Close

2

Configuration Virtual Assistant

Sales Stages Automation Display

Manage how the virtual assistant changes automatically the sales stages of your contacts.

Set this sales stage when

Adding a Contact Non-qualified Lead [2 days]

Adding Notary/Broker Not Followed

Importing a Contact Past Client [90 days]

Accepting a Lead Non-qualified Lead [2 days]

Set this sales stage to linked contacts when

Fulfilling Transaction Conditions Solicitation [30 days]

Creating a Showing Active Buyer [7 days]

Save Save and Close

4

Configuration Virtual Assistant

Sales Stages Automation Display

Manage what is displayed by your virtual assistant.

My new leads

My contacts' follow-ups

My today's and overdue activities

My showings without a showing result

Only show contacts with this keyword No Filters

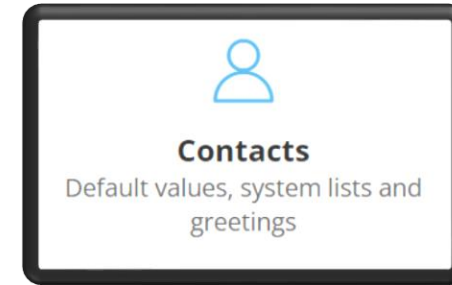
Only show activities of the past 6 months

Save Save and Close

Contacts

- The first tab, named **File**, offers the possibility to indicate the default values that will be displayed in the new contact files.

Choose your preferences from the selection available in the drop-down menus.



Configuration

Contacts
Customize default values, system lists and greetings.

File Additional Fields

Default Country: CA | Default Prov.: QC | Default Language: English | Create Contact for Brokers: Ask before each time

Sync contacts to remote applications | Sync teammates' contacts to remote applications

Share my contacts with teammates when created

Modify System Lists

Contacts Keywords | Relationships to a Listing | Cities

Modify Greetings Lists

Envelope Greets French | Greets French

Envelope Greets English | Greets English

Configuration

Contacts
Customize default values, system lists and greetings.

File Additional Fields

Default Country: CA | Default Prov.: QC | Default Language: English | Create Contact for Brokers: Ask before each time

Sync contacts to remote applications | Sync teammates' contacts to remote applications

Share my contacts with teammates when created

Modify System Lists

Contacts Keywords | Relationships to a Listing | Cities

Modify Greetings Lists

Envelope Greets French | Greets French

Envelope Greets English | Greets English

Save Save and Close

➤ Click on the *Question Mark* icons "?" for more information on the available options.

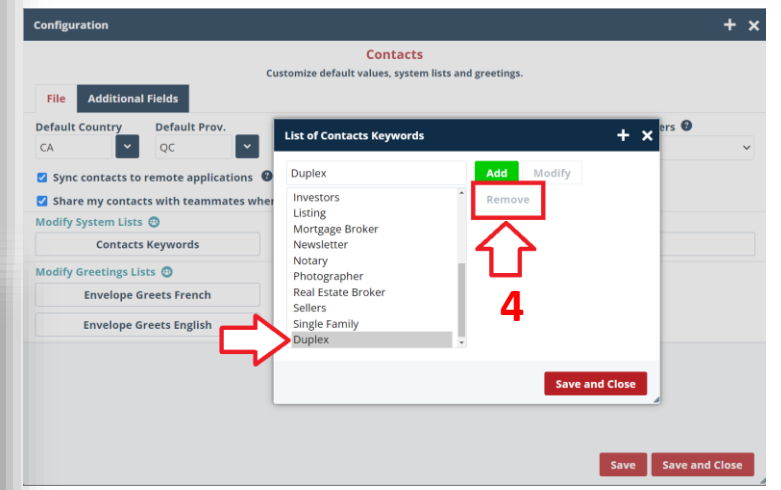
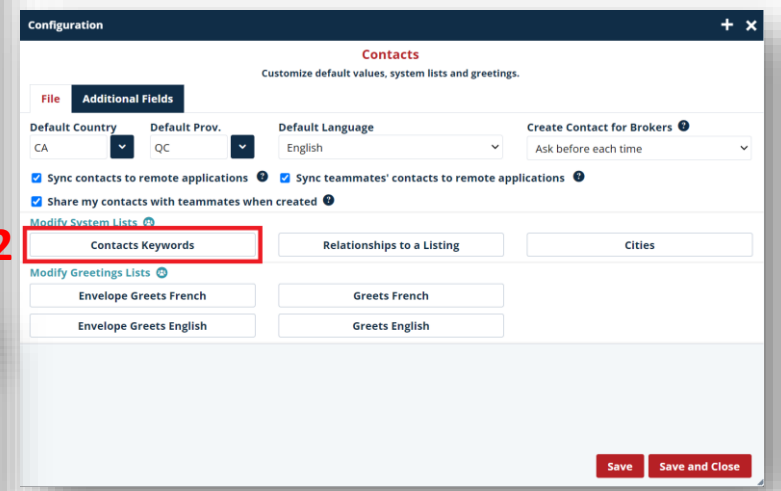
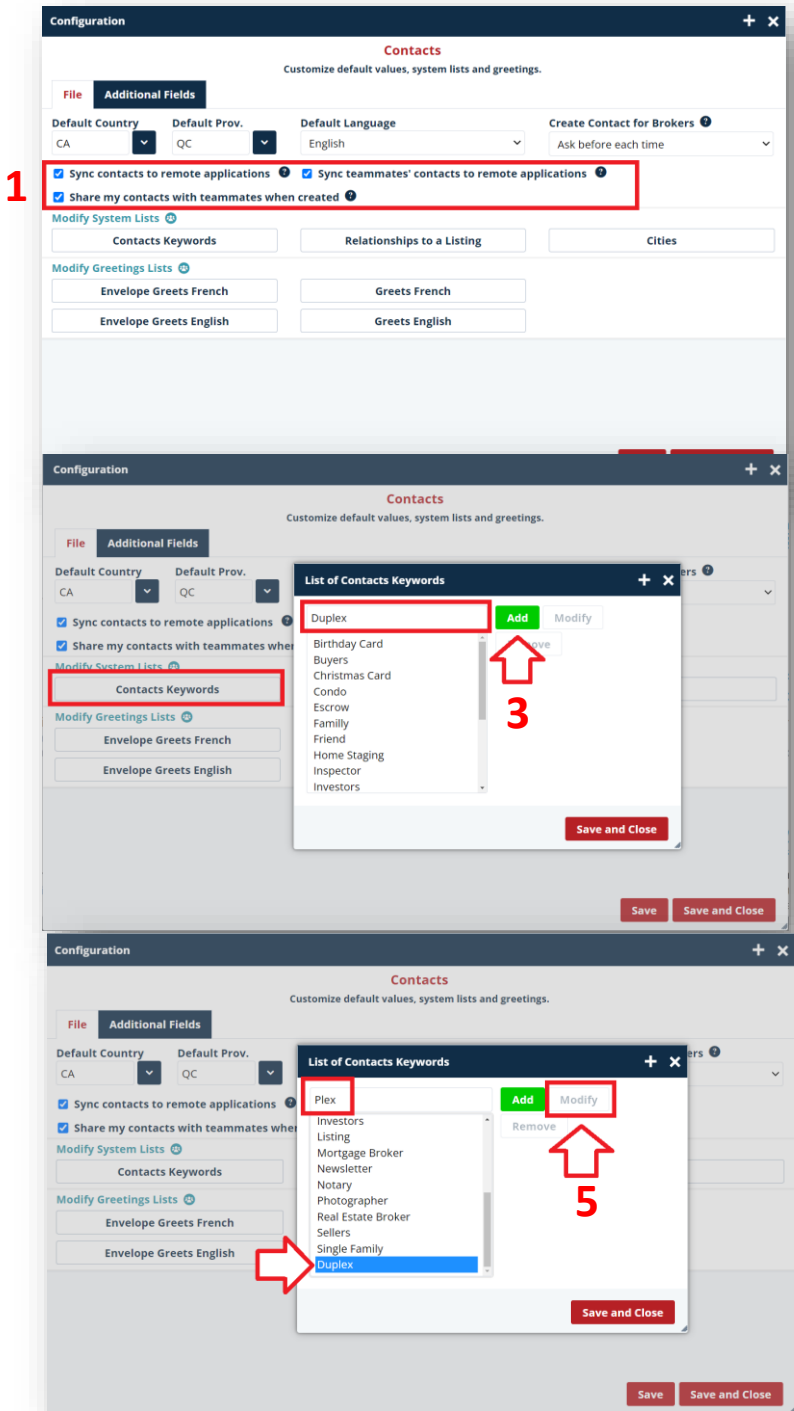
1. The following options allow you to share your contacts with other applications or with your teammates. Check the options you need to enable.

2. Create your own list of *keywords* to facilitate the search of precise and targeted contact lists.

3. After clicking on the **Contact Keywords** button, enter a new *keyword*, then click on the **Add** button to add the new *keyword* to the list.

4. Also, it is possible to delete a *keyword* that is not useful to you by selecting it and clicking on **Remove**.

5. Finally, if a *keyword* needs to be adjusted, select the *keyword*, make the necessary correction, and then use the **Modify** button.



1. Use these same methods to customize the list of ***Relationships to a Listing*** and the list of ***Cities***...
2. ...as well as in the ***Envelope Greets*** and letter ***Greets*** lists.
3. When adding new *letter greeting*, it is important to use ***dynamic references*** as shown in the ***Legend***.
4. Be sure to click ***Save and Close*** when you're done.

Configuration

Contacts

Customize default values, system lists and greetings.

File Additional Fields

Default Country: CA Default Prov.: QC Default Language: English Create Contact for Brokers: Ask before each time

Sync contacts to remote applications Sync teammates' contacts to remote applications Share my contacts with teammates when created

Modify System Lists

Contacts Keywords Relationships to a Listing Cities

Modify Greetings Lists

Envelope Greets French Greets French

Envelope Greets English Greets English

Configuration

Contacts

Customize default values, system lists and greetings.

File Additional Fields

Default Country: CA Default Prov.: QC Default Language: English Create Contact for Brokers: Ask before each time

Sync contacts to remote applications Sync teammates' contacts to remote applications Share my contacts with teammates when created

Modify System Lists

Contacts Keywords Relationships to a Listing Cities

Modify Greetings Lists

Envelope Greets French Greets French

Envelope Greets English Greets English

Save Save and Close

Configuration

Contacts

Customize default values, system lists and greetings.

Default Country: CA Default Prov.: QC Default Language: English Create Contact for Brokers: Ask before each time

Share my contacts with teammates when created

Modify System Lists

Contacts Keywords Relationships to a Listing Cities

Modify Greetings Lists

Envelope Greets French Greets French

Envelope Greets English Greets English

Save Save and Close

List of Greetings (English)

Hello [F] Add Modify Remove

Dear [SF] and [F]
Dear [F]
Dear [F] and [SF]
Dear Madam [SL] and Mister [L]
Dear Madam [L]
Dear Madam [L] and Mister [SL]
Dear Madam [F] [L]
Dear Madam and Mister [L]
Dear Mister [SL] and Madam [L]
Dear Mister [L]

Legend

[F] = First Name
[L] = Last Name
[SF] = Spouse First Name
[SL] = Spouse Last Name

Save and Close

1. The **Additional fields** tab offers you the possibility to create your own fields, according to your professional processes.
2. Prospects provides you with 12 **Text fields**,
3. a paragraph for **Additional Notes**,
4. fields for **Important Dates**,
5. and 3 **Checkboxes**.
6. Save your changes by clicking the red **Save** or **Save and Close** button.

1

Configuration

File Additional Fields

Additional Text Fields

Adtl. Text Field 1 Area	Adtl. Text Field 2 Type of Property	Adtl. Text Field 3 Bedrooms	Adtl. Text Field 4 Bathrooms
Adtl. Text Field 5 LockBox	Adtl. Text Field 6 Alarm	Adtl. Text Field 7 Pets	Adtl. Text Field 8 Children
Adtl. Text Field 9 Letter 1	Adtl. Text Field 10 Letter 2	Adtl. Text Field 11 Letter 3	Adtl. Text Field 12 Letter 4

Note Field

Additional Note Field
History

Additional Important Dates

Adtl. Important Date 1 First Contact	Adtl. Important Date 2	Adtl. Important Date 3	Adtl. Important Date 4
---	------------------------	------------------------	------------------------

Additional Checkboxes

Adtl. Checkbox 1 Active?	Adtl. Checkbox 2 Prequalified?	Adtl. Checkbox 3
-----------------------------	-----------------------------------	------------------

Save Save and Close

2

Configuration

File Additional Fields

Additional Text Fields

Adtl. Text Field 1 Area	Adtl. Text Field 2 Type of Property	Adtl. Text Field 3 Bedrooms	Adtl. Text Field 4 Bathrooms
Adtl. Text Field 5 LockBox	Adtl. Text Field 6 Alarm	Adtl. Text Field 7 Pets	Adtl. Text Field 8 Children
Adtl. Text Field 9 Letter 1	Adtl. Text Field 10 Letter 2	Adtl. Text Field 11 Letter 3	Adtl. Text Field 12 Letter 4

Note Field

Additional Note Field
History

Additional Important Dates

Adtl. Important Date 1 First Contact	Adtl. Important Date 2	Adtl. Important Date 3	Adtl. Important Date 4
---	------------------------	------------------------	------------------------

Additional Checkboxes

Adtl. Checkbox 1 Active?	Adtl. Checkbox 2 Prequalified?	Adtl. Checkbox 3
-----------------------------	-----------------------------------	------------------

Save Save and Close

3

Configuration

File Additional Fields

Additional Text Fields

Adtl. Text Field 1 Area	Adtl. Text Field 2 Type of Property	Adtl. Text Field 3 Bedrooms	Adtl. Text Field 4 Bathrooms
Adtl. Text Field 5 LockBox	Adtl. Text Field 6 Alarm	Adtl. Text Field 7 Pets	Adtl. Text Field 8 Children
Adtl. Text Field 9 Letter 1	Adtl. Text Field 10 Letter 2	Adtl. Text Field 11 Letter 3	Adtl. Text Field 12 Letter 4

Note Field

Additional Note Field
Transaction History

Additional Important Dates

Adtl. Important Date 1 First Contact	Adtl. Important Date 2	Adtl. Important Date 3	Adtl. Important Date 4
---	------------------------	------------------------	------------------------

Additional Checkboxes

Adtl. Checkbox 1 Active?	Adtl. Checkbox 2 Prequalified?	Adtl. Checkbox 3
-----------------------------	-----------------------------------	------------------

Save Save and Close

4

Configuration

File Additional Fields

Additional Text Fields

Adtl. Text Field 1 Area	Adtl. Text Field 2 Type of Property	Adtl. Text Field 3 Bedrooms	Adtl. Text Field 4 Bathrooms
Adtl. Text Field 5 LockBox	Adtl. Text Field 6 Alarm	Adtl. Text Field 7 Pets	Adtl. Text Field 8 Children
Adtl. Text Field 9 Letter 1	Adtl. Text Field 10 Letter 2	Adtl. Text Field 11 Letter 3	Adtl. Text Field 12 Letter 4

Note Field

Additional Note Field
Transaction History

Additional Important Dates

Adtl. Important Date 1 First Contact	Adtl. Important Date 2	Adtl. Important Date 3	Adtl. Important Date 4
---	------------------------	------------------------	------------------------

Additional Checkboxes

Adtl. Checkbox 1 Active?	Adtl. Checkbox 2 Prequalified?	Adtl. Checkbox 3
-----------------------------	-----------------------------------	------------------

Save Save and Close

5

Configuration

File Additional Fields

Additional Text Fields

Adtl. Text Field 1 Area	Adtl. Text Field 2 Type of Property	Adtl. Text Field 3 Bedrooms	Adtl. Text Field 4 Bathrooms
Adtl. Text Field 5 LockBox	Adtl. Text Field 6 Alarm	Adtl. Text Field 7 Pets	Adtl. Text Field 8 Children
Adtl. Text Field 9 Letter 1	Adtl. Text Field 10 Letter 2	Adtl. Text Field 11 Letter 3	Adtl. Text Field 12 Letter 4

Note Field

Additional Note Field
Transaction History

Additional Important Dates

Adtl. Important Date 1 First Contact	Adtl. Important Date 2	Adtl. Important Date 3	Adtl. Important Date 4
---	------------------------	------------------------	------------------------

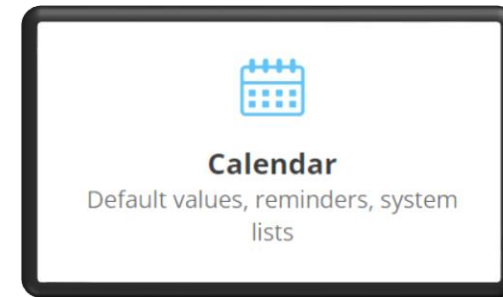
Additional Checkboxes

Adtl. Checkbox 1 Active?	Adtl. Checkbox 2 Prequalified?	Adtl. Checkbox 3
-----------------------------	-----------------------------------	------------------

Save Save and Close

Calendar

- It is possible to configure the default values of your calendar.
- Select your preference by clicking on the drop-down menus to choose; the **Start of Day** time and **End of Day** time in your calendar, your **Time Zone** and the first day of the week that will be displayed.



Configuration
+
×

Calendar

Customize default values, reminders and system lists.

Start of Day
08:00 AM

End of Day
10:00 PM

Time Zone
America/Montreal

Week Starts On
Monday

Activities colour

Display private activities as "busy" to teammates

Ask to create a follow-up when activities are marked as done

Activities Interval
15 minutes

Default Showing Duration
30 minutes

Default Activity Duration
60 minutes

Share my activities with teammates when created

Email Reminder

Calendar Activities
 15 Minutes before

Important Dates
 1 day(s) before

Email
(1) Prospects Test

Modify System Lists

Activities Descriptions

Showings Results

Save
Save and Close

1. Next, set the default interval and duration for activities and showings.
2. By checking the ***Synchronize activities with remote applications*** box, your activities will be visible in the external applications that you have configured, for example *Outlook* or *Google*.
3. In the case that the ***Share my activities with my teammates when created*** box is checked, your teammates will be able to see all your activities, so these can no longer be identified as ***Private***.
4. You can enable the default ***Email Reminders*** related to your calendar activities. Activate the function and select the desired delay.

Configuration + x

Calendar
Customize default values, reminders and system lists.

Start of Day: 08:00 AM
End of Day: 10:00 PM

Time Zone: America/Montreal
Week Starts On: Monday

Activities Interval: 15 minutes
Default Showing Duration: 30 minutes
Default Activity Duration: 60 minutes

Share my activities with teammates when created

Email Reminder

Calendar Activities: 15 Minutes before
Important Dates: 1 day(s) before

Modify System Lists

Activities Descriptions Showings Results

Activities colour
 Display private activities as "busy" to teammates
 Ask to create a follow-up when activities are marked as done

Configuration + x

Calendar
Customize default values, reminders and system lists.

Start of Day: 08:00 AM
End of Day: 10:00 PM

Time Zone: America/Montreal
Week Starts On: Monday

Activities Interval: 15 minutes
Default Showing Duration: 30 minutes
Default Activity Duration: 60 minutes

Share my activities with teammates when created

Email Reminder

Calendar Activities: 15 Minutes before
Important Dates: 1 day(s) before

Modify System Lists

Activities Descriptions Showings Results

Activities colour
 Display private activities as "busy" to teammates
 Ask to create a follow-up when activities are marked as done

Email: (1) Prospects Test

Save Save and Close

Configuration

Calendar
Customize default values, reminders and system lists.

Start of Day: 08:00 AM
End of Day: 10:00 PM

Time Zone: America/Montreal
Week Starts On: Monday

Activities Interval: 15 minutes
Default Showing Duration: 30 minutes

Share my activities with teammates when created

Email Reminder

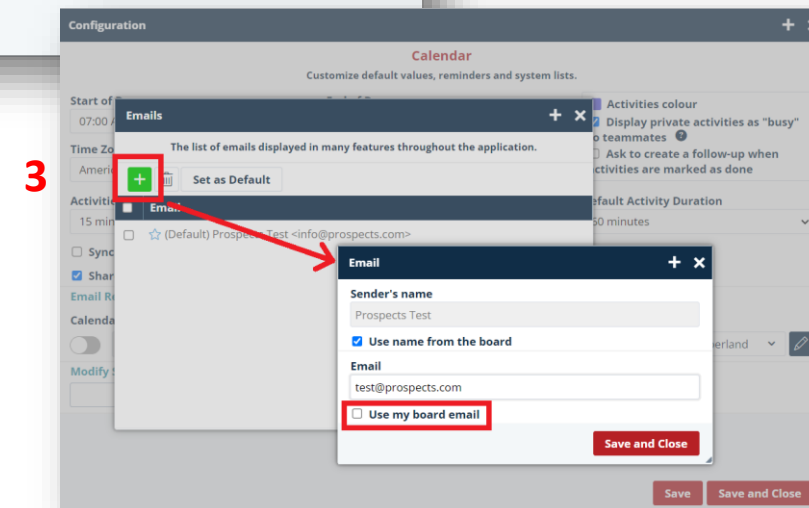
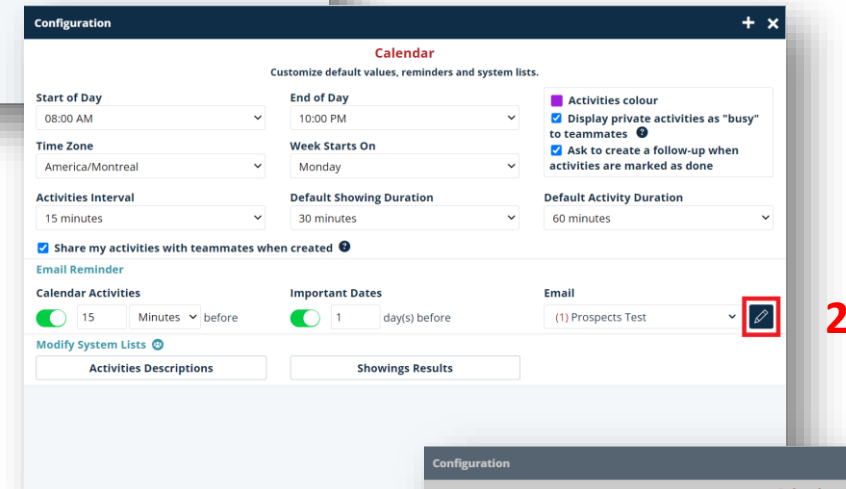
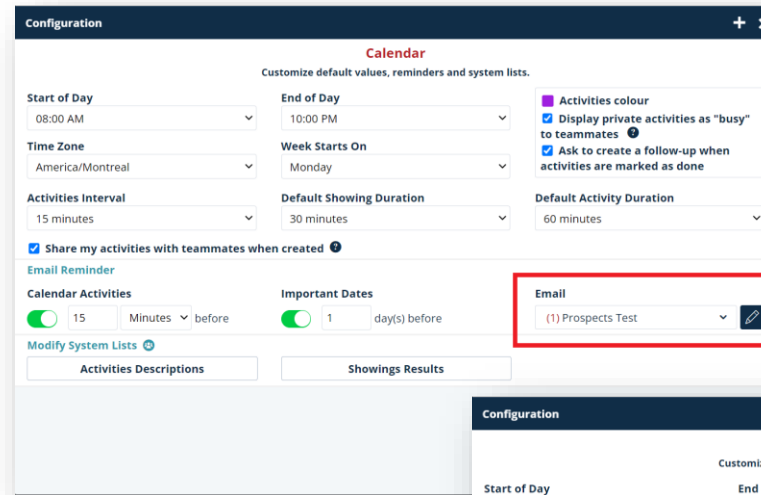
Calendar Activities: 15 Minutes before
Important Dates: 1 day(s) before

Modify System Lists

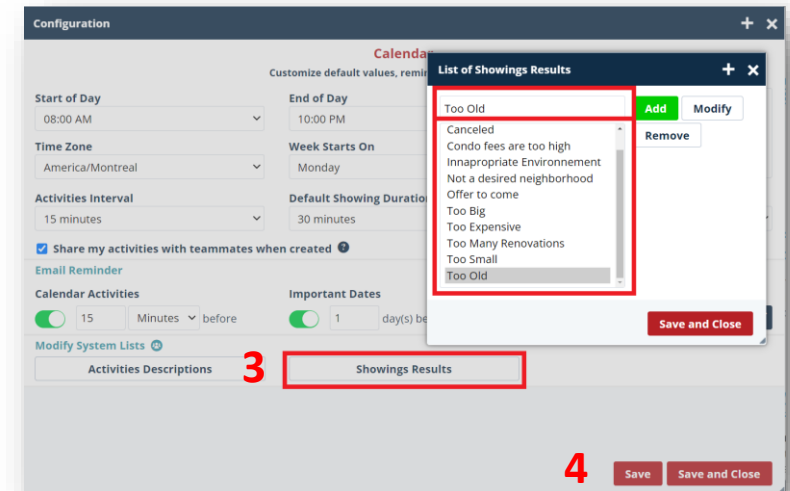
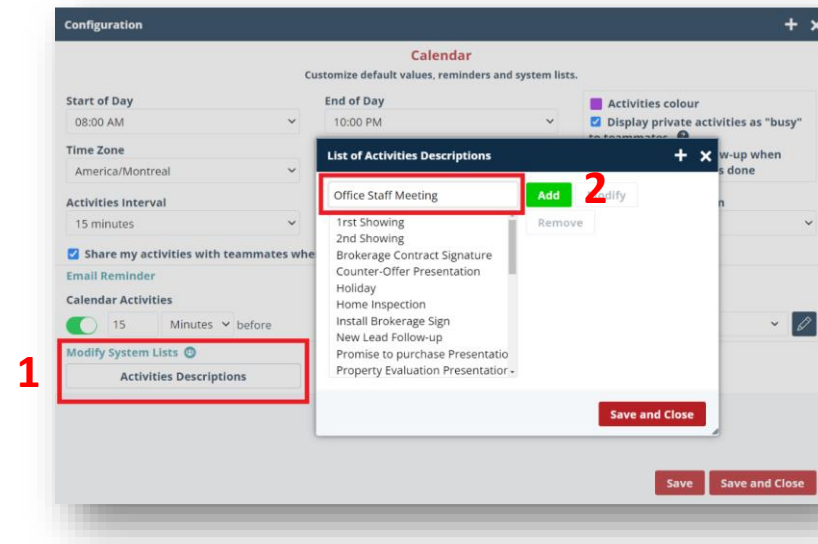
Activities Descriptions Showings Results

Save Save and Close

1. Click on the drop-down menu to select the **Email** where the reminders will be sent,
2. or click on the *pencil* icon to add or modify an email address.
3. The “+” icon allows you to add an email address. Uncheck the box to unlock the field.



1. The **Activities Descriptions** list allows you to customize the titles of the activities you will use most frequently.
2. After clicking on the **Activities Descriptions** button, it will be possible to enter a new title, then press the **Add** button. Click **Save and Close** to save the new list of descriptions.
3. Repeat the previous steps to create the list of the most common **Showings Results**.
4. Save your changes by clicking the red **Save** or **Save and Close** button.



Listings

1. The **Dashboard Display** allows you to change the number of days your listings will appear as “to expire” and as “new” in your dashboard.
2. From a listing file, you can activate the **Notify Me** feature to ensure you don't miss a price drop and/or the expiration date for that property.
3. To activate this feature, make sure that the two toggle buttons are activated (in green).
4. Choose the information that will appear by default on the listing sheets that you send to your contacts by checking the desired options.

Configuration Listings

Configure all settings related to listings.

Dashboard Display

Display as "to expire" 30 days before expiration

Display as "new" up to 21 days after listing registration

Email Notifications

Subscribe under the listing action menu to receive these notifications:

Enable on price drops Enable for expired listings

Default information displayed in sent listings

Select the default information to be displayed in the listings sent to your clients.

The listing's street address Inclusions/Exclusions

Additional pictures of the property Units

Addenda

Save Save and Close

Configuration Listings

Configure all settings related to listings.

Dashboard Display

Display as "to expire" 30 days before expiration

Display as "new" up to 21 days after listing registration

Email Notifications

Subscribe under the listing action menu to receive these notifications:

Enable on price drops Enable for expired listings

Default information displayed in sent listings

Select the default information to be displayed in the listings sent to your clients.

The listing's street address Inclusions/Exclusions

Additional pictures of the property Units

Addenda

Save Save and Close

Listings
Dashboard, notifications, information sent

Listing: Summary History To Do Contacts Transactions Emails

Action

- Add Activity
- Send an Email Campaign
- Send a Virtual Card
- Send By Email
- Start an Action Plan
- Notify Me
- Generate Activity Report

Price: \$1,125,000

Centris # 11143349

Status Active

Property Type (UNI) One-and-a-half-storey

Building Type Detached

Electricity \$3,220 Yearly

Municipal Taxes \$6,062 Yearly 2023

School taxes \$605 Yearly 2023

Year Built Unknown

Configuration Listings

Configure all settings related to listings.

Dashboard Display

Display as "to expire" 30 days before expiration

Display as "new" up to 21 days after listing registration

Email Notifications

Subscribe under the listing action menu to receive these notifications:

Enable on price drops Enable for expired listings

Default information displayed in sent listings

Select the default information to be displayed in the listings sent to your clients.

The listing's street address Inclusions/Exclusions

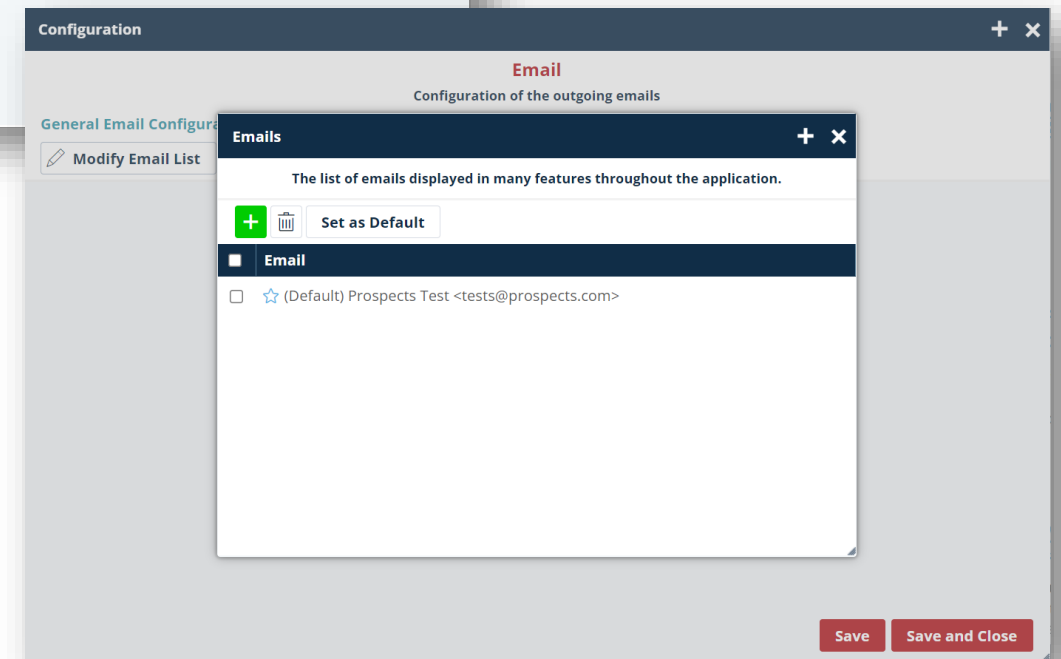
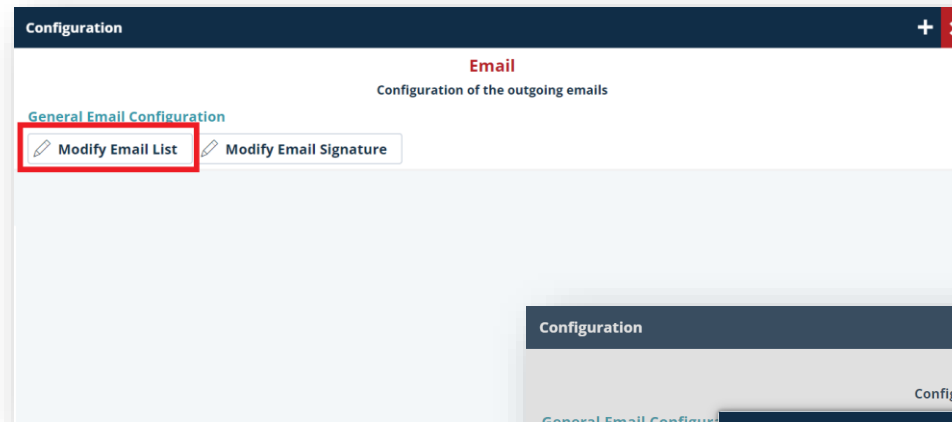
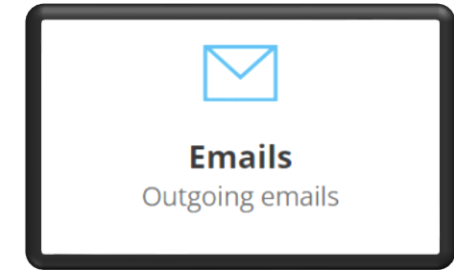
Additional pictures of the property Units

Addenda

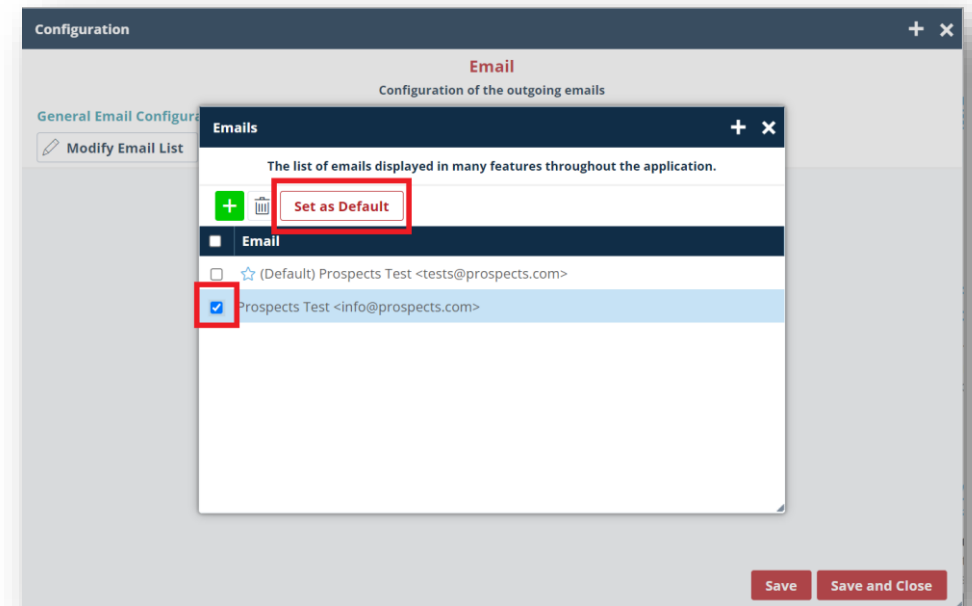
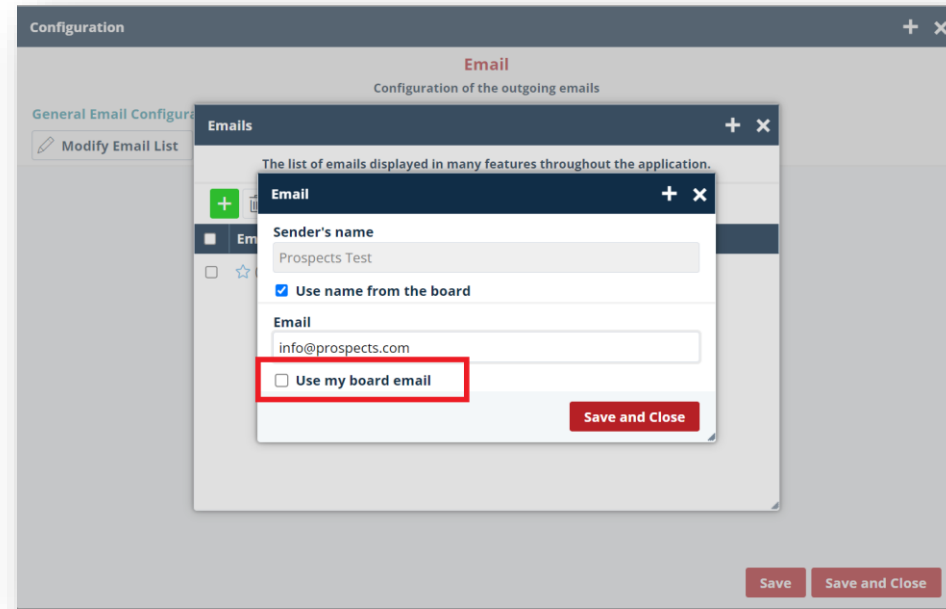
Save Save and Close

Emails

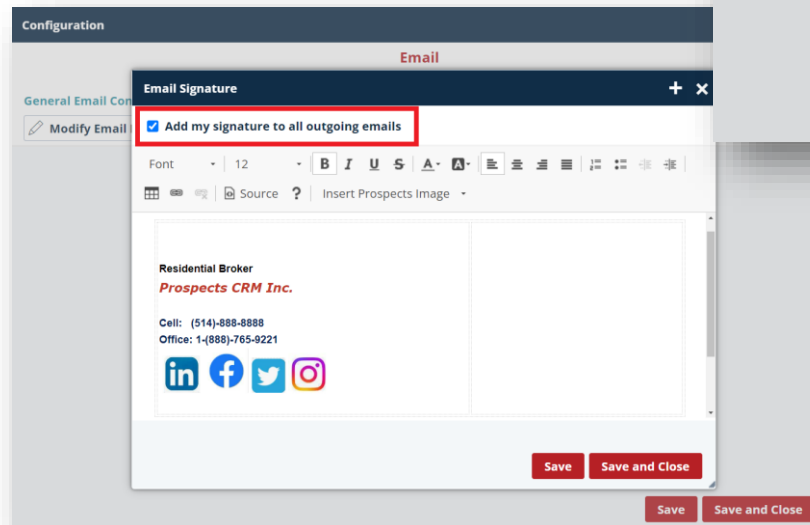
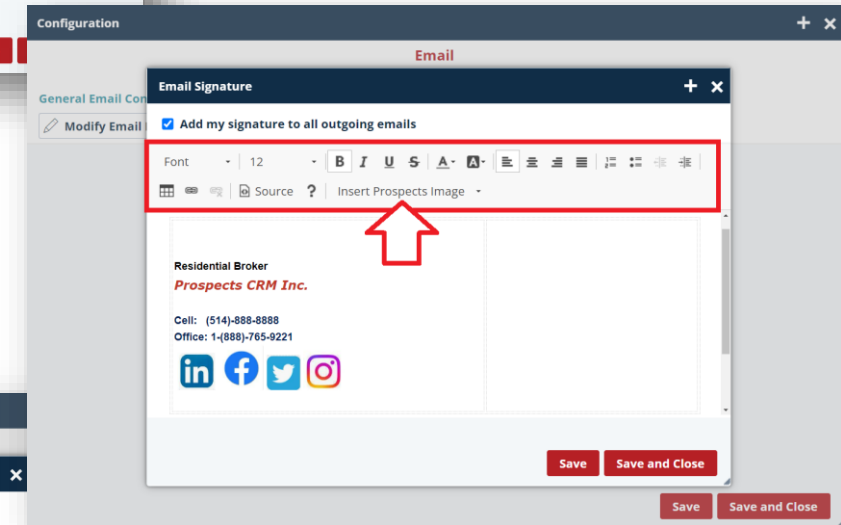
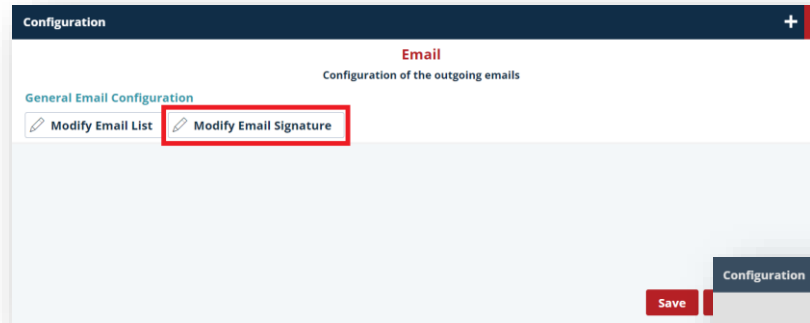
- You can use several email addresses in the different functions of your software.
- Click on ***Modify Email list.***
- The “+” allows you to add an email address.
- Double-clicking on an existing address allows you to modify it.



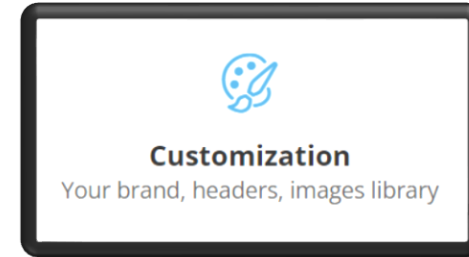
1. The system uses your default real estate board email.
2. If you wish to change this email, uncheck the ***Use my board email*** box.
3. To identify the email that the system should use by default, check it and click on the ***Set as default*** button, then on the "X" to close the window.
4. Remember to ***Save and Close*** once you have changed your email address.



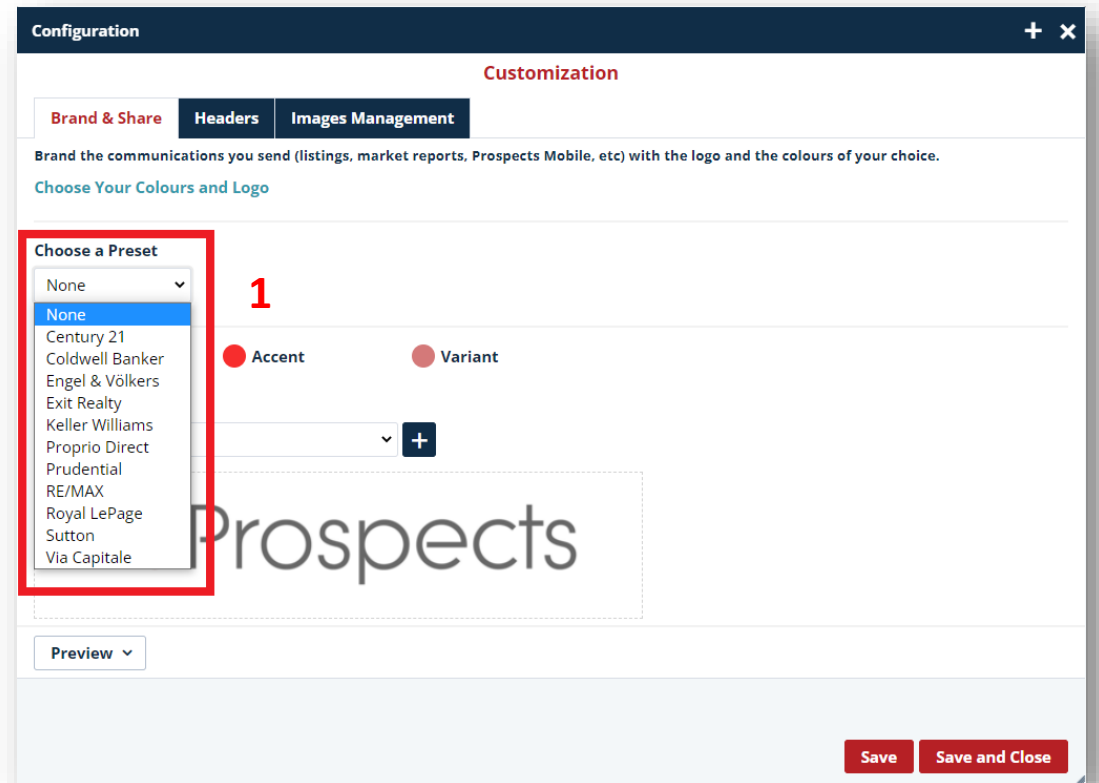
1. Select the **Modify Email Signature** option to customize your email signature.
2. Use the toolbar to add formatting to your text.
3. You can also import your own signature by inserting it as a *Prospects image*.
4. Make sure the **Add my signature to all outgoing emails** box is checked if you want your signature to be added automatically.
5. Save your changes by clicking the red **Save** or **Save and Close** button.



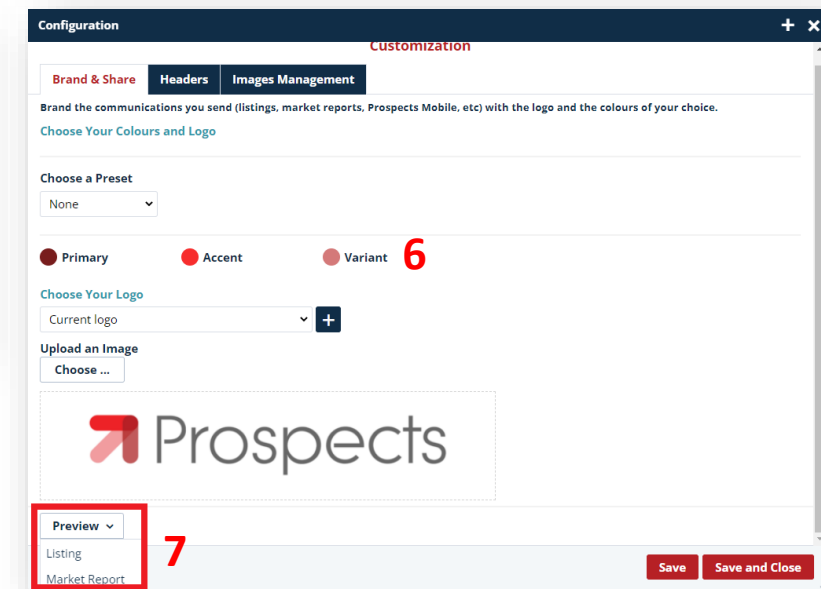
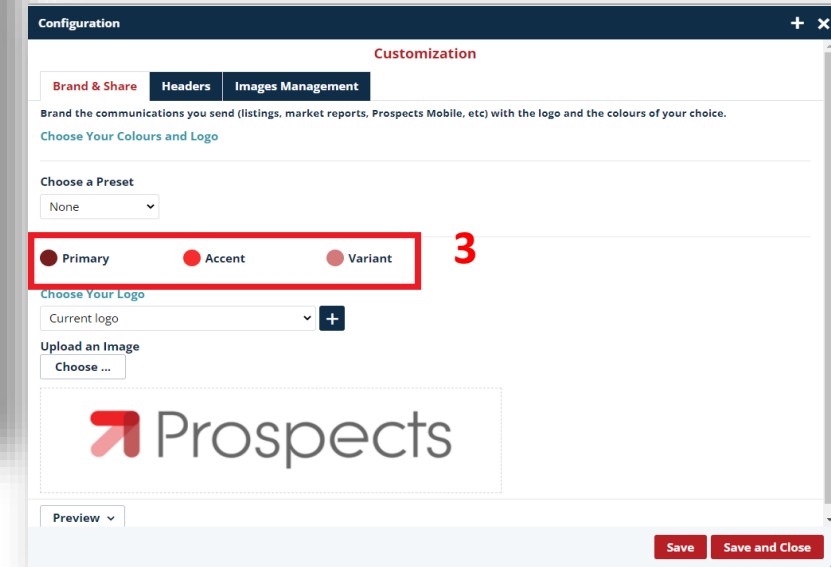
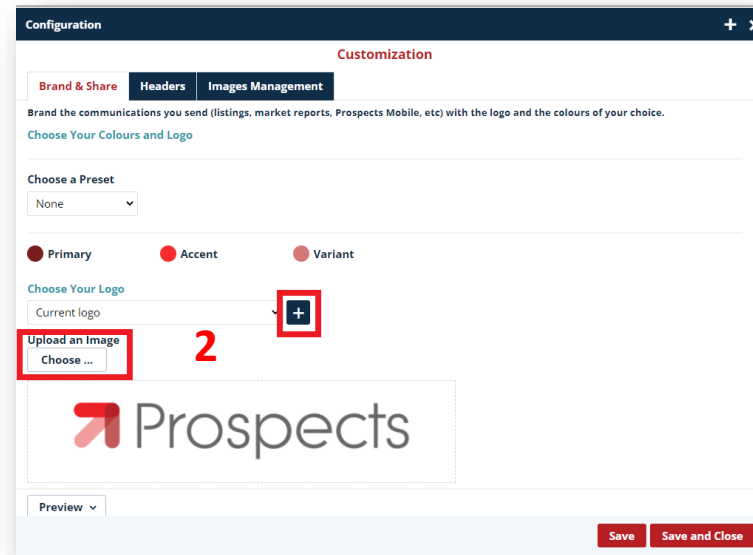
Customization



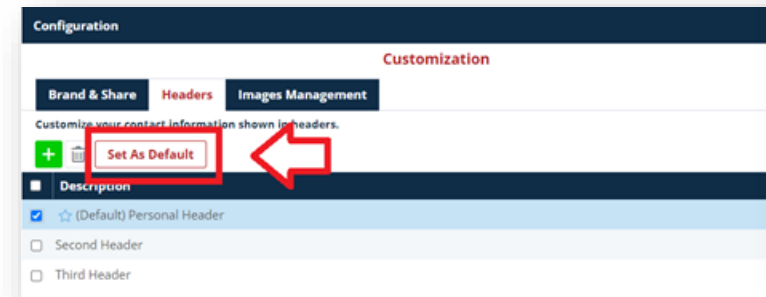
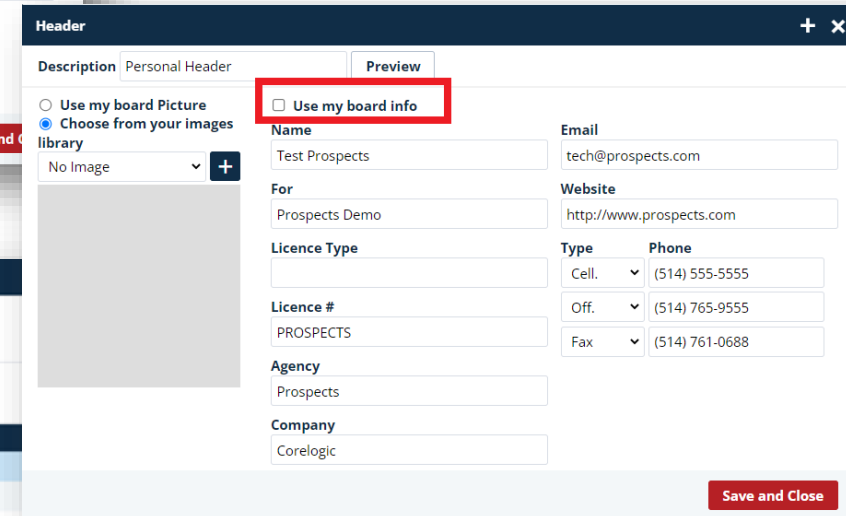
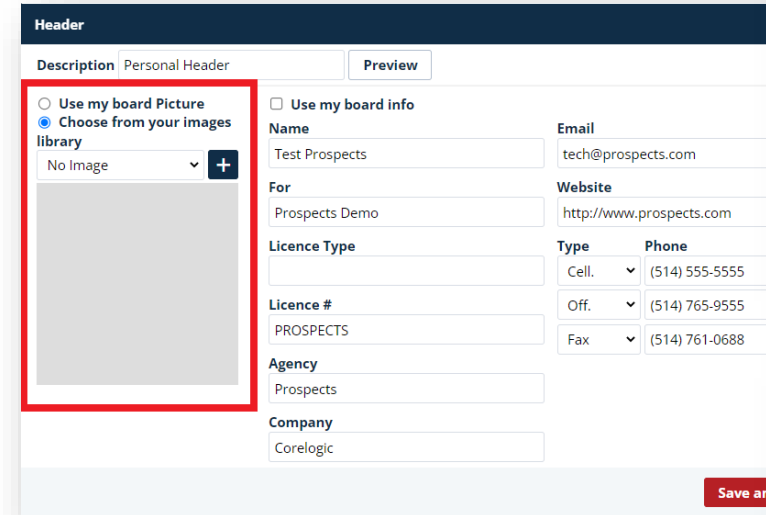
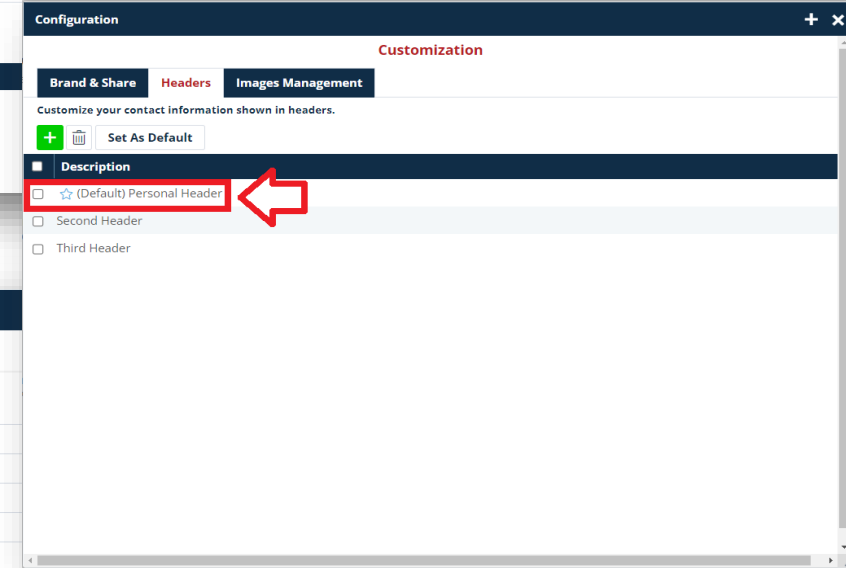
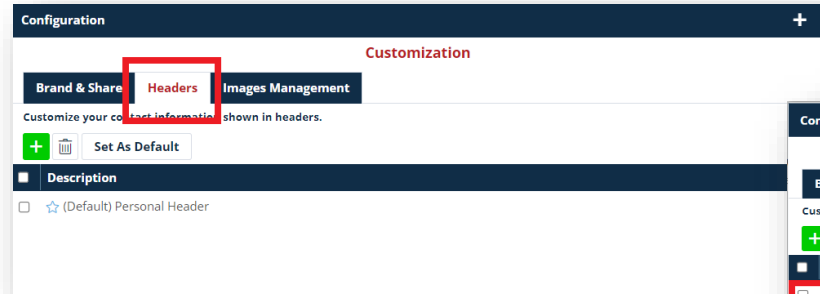
- Personalize your marketing content with your brand image, your colors and contact information.
- **Presets** have been made available to you to quickly configure. Click on the drop-down menu to select your banner from the list.



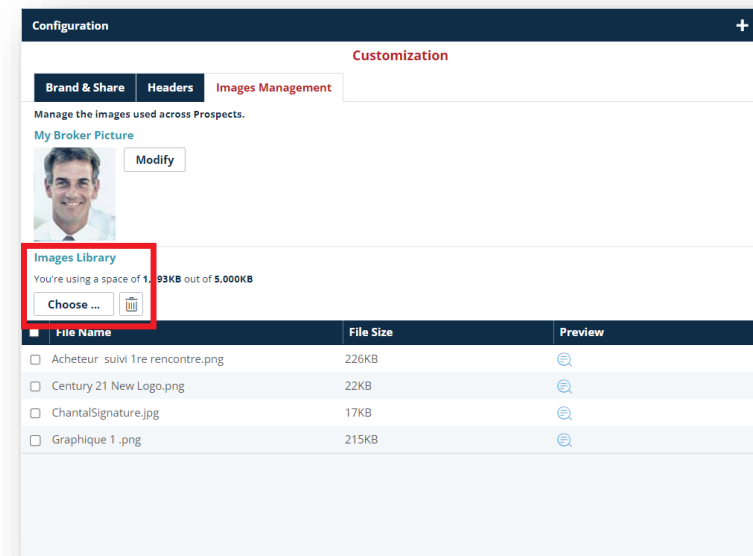
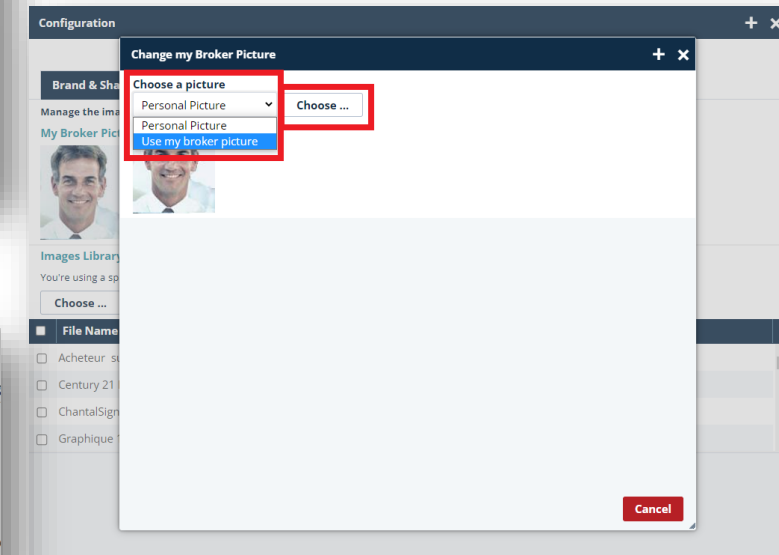
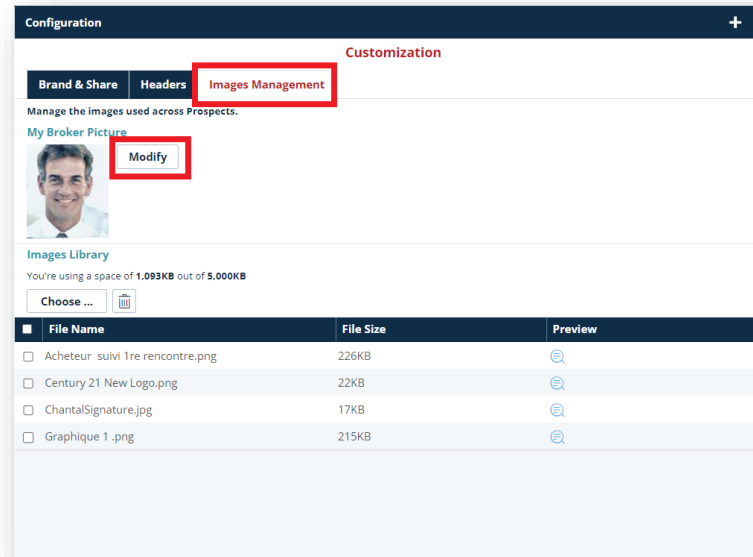
1. If your banner is not listed, or if you prefer to insert your personalized logo, select the **None** option.
2. To add your logo, use the drop-down menu to select an image from your *Prospects image library* or click on the “+”, then on **Choose** to search for the logo on your computer.
3. The selection of colors is done by clicking on the colored circles.
4. Click and drag the arrows on the center bar to choose your color, then click and drag the circle to choose the shade you prefer.
5. It is also possible to enter the color code in the “#” box.
6. When your color selection is complete, click outside the black box. Repeat these steps for the selection of the other 2 colors.
7. The **Preview** button lets you see a preview of a listing sheet or market report with your new setup.



1. Select the **Headers** tab.
2. You can configure your headers that will be displayed on documents. To modify an existing header, double-click on the title.
3. Select the first option to use your broker photo from the real estate board.
4. Select the second option to choose another photo. Use the drop-down menu to choose a photo from your *Image Library* or click on the “+” to select a photo from your computer.
5. If you need to modify the information displayed, uncheck the box **Use my board info**.
6. If you are configuring more than one header, check the desired header, then click on **Set as default**.



1. In the next tab, the **Images management** tab, you will find your default real estate board profile photo as well as the **Images Library**.
2. The broker/agent picture will be displayed by default. It is possible to modify it by clicking on the **Modify** button.
3. Select an image from the drop-down menu or click the **Choose** button to select an image from your computer.
4. The images you want to add in your text templates or in your signature must be deposited in the **Image Library**.
5. To upload photos, click the **Choose** button to select an image from your computer.



Match!

- You can modify the **Subject** of the email that will be sent, as well as the **Text** content of the email.
- If you wish to include information from your contact file, such as the greeting or the first and last name of your contact, you can do so using the drop-down menu on the right **Add contact information**.
- You can receive an email notification after your contact views a listing multiple times.
- Make sure to select the email where you would like to receive the *Match* notifications using the drop-down list. Choose the number of **views** required before for you receive the email notification.
- You can make changes to the French equivalent under the first tab, **Text French**.
- Save your changes by clicking the red **Save and Close** button.

Configuration Match!
Configure the notifications and the information displayed in your Match! sent by email.

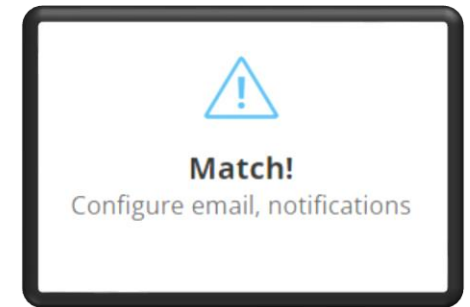
Text French **Text English**

Subject
Here are properties that might interest you!

Text
[letterGreet].
Here is what our property search engine has found for you today!
Don't hesitate to contact us for more information if any of these properties draw your attention, or if you wish to modify your search criteria. We will be pleased to provide you with additional information.

Notify by Email When Viewed
Email (1) Prospects Test <tes... **After** 3 views

Save



Configuration Match!
Configure the notifications and the information displayed in your Match! sent by email.

Text French **Text English**

Subject
Here are properties that might interest you!

Text
[letterGreet].
Here is what our property search engine has found for you today!
Don't hesitate to contact us for more information if any of these properties draw your attention, or if you wish to modify your search criteria. We will be pleased to provide you with additional information.

Notify by Email When Viewed
Email (1) Prospects Test <tes... **After** 3 views

Save **Save and Close**

Configuration Match!
Configure the notifications and the information displayed in your Match! sent by email.

Text French **Text English**

Subject
Here are properties that might interest you!

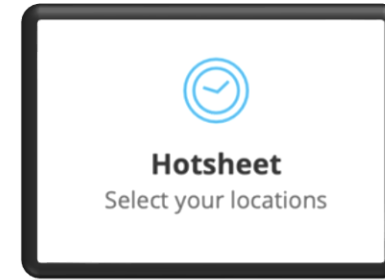
Text
[letterGreet].
Here is what our property search engine has found for you today!
Don't hesitate to contact us for more information if any of these properties draw your attention, or if you wish to modify your search criteria. We will be pleased to provide you with additional information.

Notify by Email When Viewed
Email (1) Prospects Test <tes... **After** 3 views

Save **Save and Close**

Hotsheet

- The **Hotsheet** feature allows you to get an overview of recent real estate activity in your firm sector.
- First, define the search criteria by choosing the **Property Types** you want to keep track of.
- After, choose up to **10 locations**. Type the municipality name or use the *book* icon to search the list for municipalities that will define your sector.
- Lastly, using the drop-down menu, adjust the frequency of your market updates by choosing the **Number of days** you prefer.



Configuration + x

Hotsheet
Select up to 10 Hotsheet locations:

Property Type

(6) Single Family, Revenue Property, ^

Select All

Land/Lot

Single Family

Farm/Hobby Farm

Revenue Property

Condominium/Residential Apartment

Commercial or Industrial Property or Block Sale

Number of days
5 v

Area 1

Area 2

Area 3

Area 4

Area 5

Area 6

Area 7

Municipality 4
Chertsey

Municipality 5
Arundel

Municipality 6
Wentworth

Municipality 7
—

Number of days

5 v

1

3

5

7

14

30

Configuration + x

Hotsheet
Select up to 10 Hotsheet locations:

Property Type
(6) Single Family, Revenue Property, v

Number of days
5 v

Area 1

Area 2

Area 3

Area 4

Area 5

Area 6

Area 7

Municipality 1
Barkmere

Municipality 2
Amherst

Municipality 3
Rawdon

Municipality 4
Chertsey

Municipality 5
Arundel

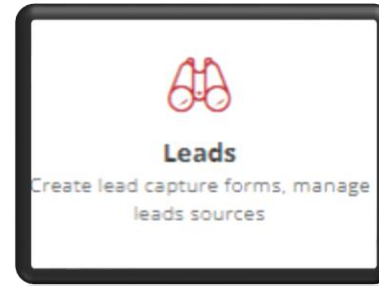
Municipality 6
Wentworth

Municipality 7
—

Save **Save and Close**

Leads

- Click on the **Add** menu to add other **Source Types** to your software.



Configuration + x

Leads
Create lead capture forms for your website and manage your leads sources.

Add ▼ 🗑️

Source Type	Lead Source Name	Assigned to	Form Views	Received
Requests from Centris.ca		Marie-Pierre Chamberland	0	0
Match! Branded Listings Sheets		Profil Patricia Lévesque	0	0
Sent Branded Listings Sheets		Profil Patricia Lévesque	0	0
Market Report		Profil Patricia Lévesque	0	0
Branded Mobile App		Pr		

Configuration + x

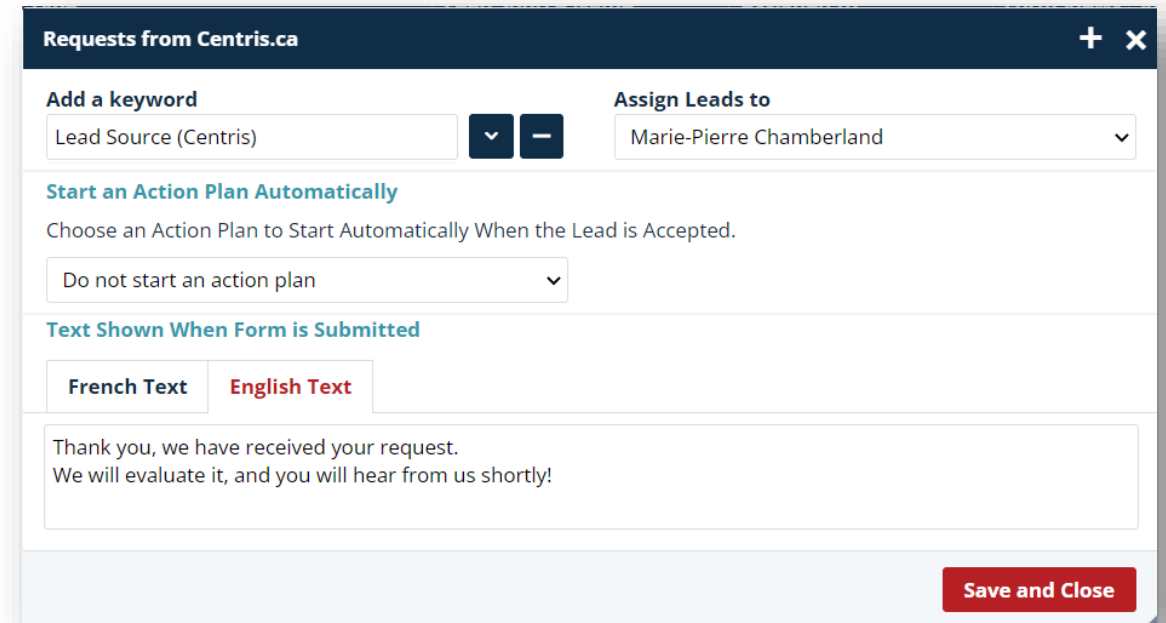
Leads
Create lead capture forms for your website and manage your leads sources.

Add ▼ 🗑️

Lead Source Name	Assigned to	Form Views	Received
Custom Lead Form - Info Request Fields			
Custom Lead Form - Buyers Fields	Marie-Pierre Chamberland	0	0
Custom Lead Form - Sellers Fields	Profil Patricia Lévesque	0	0
Custom Lead Form - Market Report Fields	Profil Patricia Lévesque	0	0
Facebook Ads	Profil Patricia Lévesque	0	0
market report			
Branded Mobile App	Profil Patricia Lévesque	0	0

1. It is possible to associate a *Keyword** with the *Source*. This will be automatically added to the contact file once the *Lead* is accepted.
2. You can also associate an *Action Plan** with the *Source*. This will be automatically triggered when the *Lead* is accepted.
3. It is also possible to assign *Leads* to a colleague in your team. Please note that this configuration must be made in each of the *Sources* and in each of the team members' accounts.

* The *Keyword* and/or *Action Plan* must already exist in order to be associated with a *Source*.



The screenshot shows a configuration window titled "Requests from Centris.ca" with a dark blue header and a white body. The window contains the following sections:

- Add a keyword:** A text input field containing "Lead Source (Centris)", a dropdown arrow, and a minus sign button.
- Assign Leads to:** A dropdown menu showing "Marie-Pierre Chamberland" with a dropdown arrow.
- Start an Action Plan Automatically:** A section with the instruction "Choose an Action Plan to Start Automatically When the Lead is Accepted." and a dropdown menu set to "Do not start an action plan".
- Text Shown When Form is Submitted:** Two tabs, "French Text" and "English Text", with "English Text" selected. Below the tabs is a text area containing the message: "Thank you, we have received your request. We will evaluate it, and you will hear from us shortly!".
- Save and Close:** A red button in the bottom right corner.

Activity Report

- In the **Activity Report** tab, you can select the default language for activity reports. The default language will automatically be applied to contacts who do not have a primary language defined in their contact file.
- Check all the options you want to display on your clients' **Activity report**.
- Once finished, save your selection by clicking on the red **Save** or **Save and Close** button.

The image illustrates the configuration process for the Activity Report. It shows three overlapping screenshots of the 'Configuration' window for the 'Activity Report' tab. The window title is 'Configuration' and the subtitle is 'Activity Report'. The main instruction is 'Choose what you wish to display by default in your clients' activity reports.'

The first screenshot (top-left) shows the 'Default Language' dropdown menu set to 'English' (used when you did not set a language in your contact file), which is highlighted with a red box.

The second screenshot (top-right) shows the 'All Activity Reports' section with several options checked, including 'Display Activities', 'Display Activities' Brokers', 'Display CMA's', 'Display Showings', and 'Display Emails', all highlighted with a red box.

The third screenshot (bottom) shows the 'Save' and 'Save and Close' buttons at the bottom right, with a red arrow pointing to them.

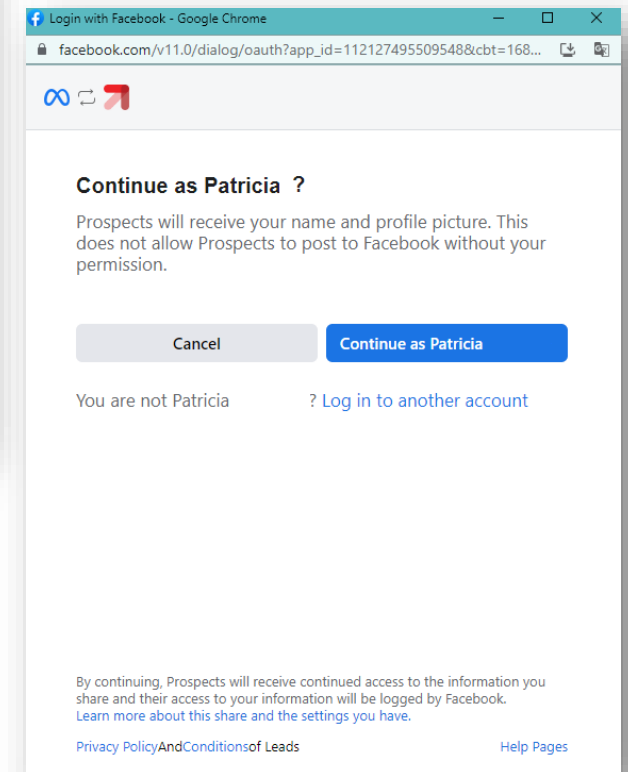
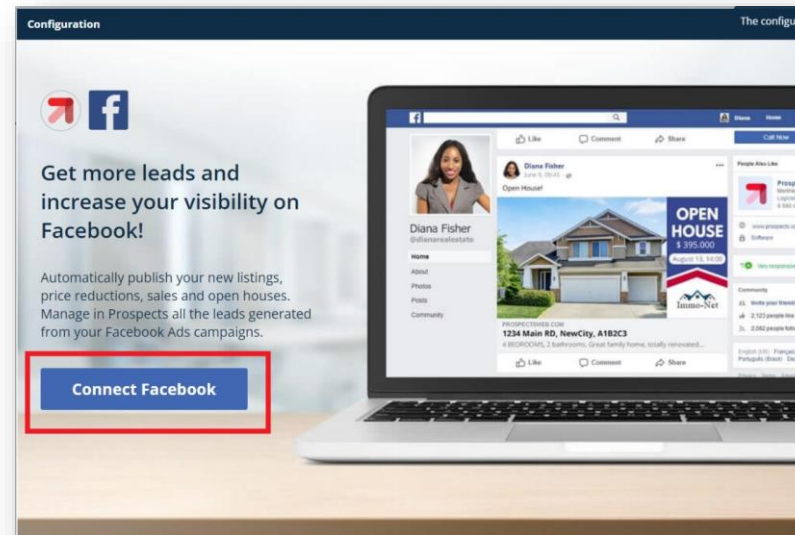
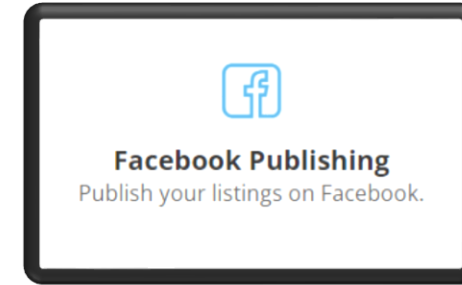
1. If you would like to offer your clients the possibility of viewing their *Activity report* from your website, select the second **Online Activity Report** tab.
2. Click the **Send the instructions to my webmaster** button and follow the on-screen steps to send them the installation guide.
3. Then, all you have to do is select the **Default Language** and your preferences as you did in the previous **Activity Report** tab.
4. Don't forget to **Save** your selection.

The screenshot shows the 'Configuration' window for 'Activity Report'. The 'Online Activity Report' tab is selected and highlighted with a red box. Below the tabs, there is a text box with the instruction: 'Let your clients log in to see their reports directly from your website! Simply send the instructions to your webmaster to activate this feature.' Below this text is a button labeled 'Send these instructions to my webmaster'. The 'Default Language' is set to 'English'. There are three sections of checkboxes: 'All Activity Reports', 'Contacts Activity Reports', and 'Listings Activity Reports'. The 'All Activity Reports' section includes 'Display Activities', 'Display Activities' Brokers', 'Display CMA's', 'Display Showings', 'Display Emails', and 'Display Market Report'. The 'Contacts Activity Reports' section includes 'Display Activities' Listings' and 'Display Match!'. The 'Listings Activity Reports' section includes 'Display Listing Picture' and 'Display Advertising Summary'. At the bottom right, there are 'Save' and 'Save and Close' buttons.

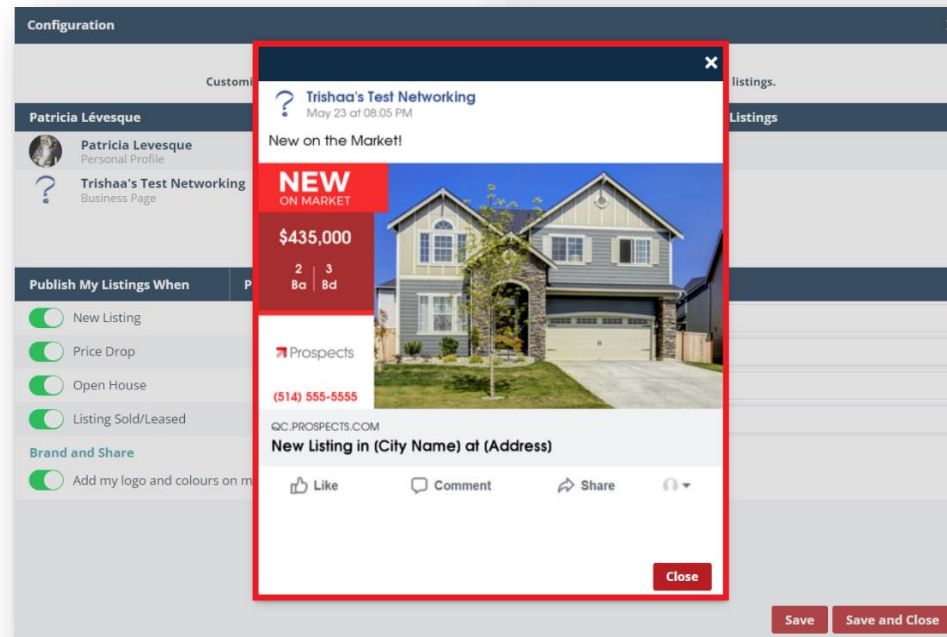
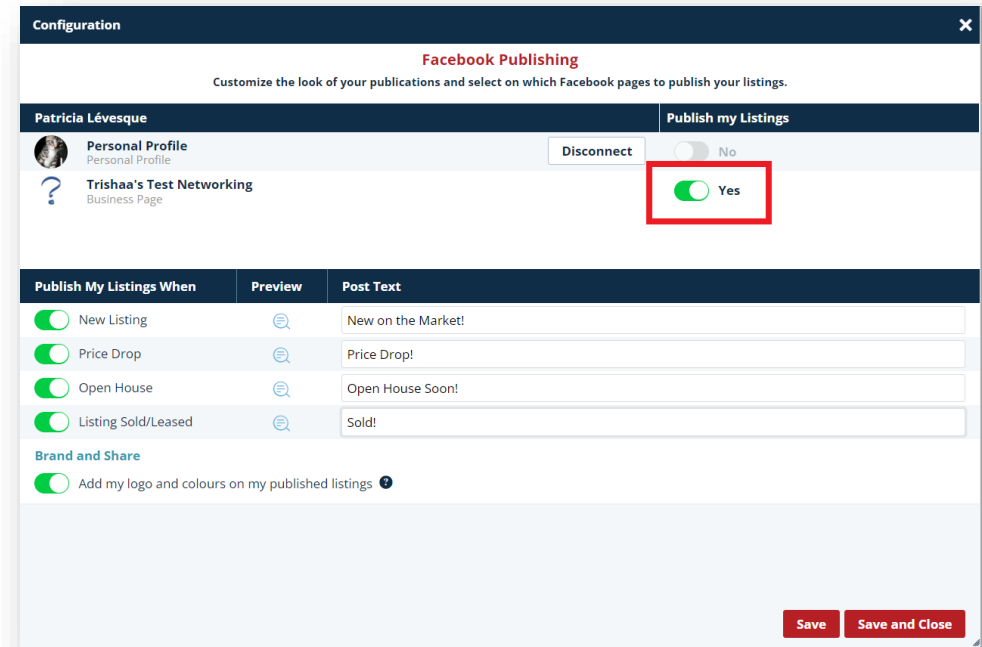
This screenshot is similar to the one above, but with a red box highlighting the 'Send these instructions to my webmaster' button and a red arrow pointing to it from the right. The 'Online Activity Report' tab is also highlighted with a red box. The rest of the interface, including the 'Default Language' and the various sections of checkboxes, remains the same as in the previous screenshot.

Facebook Publishing

- Click on the **Connect Facebook** button and follow the instructions on screen to log onto your **Facebook** account.
- Select your profile and business pages.

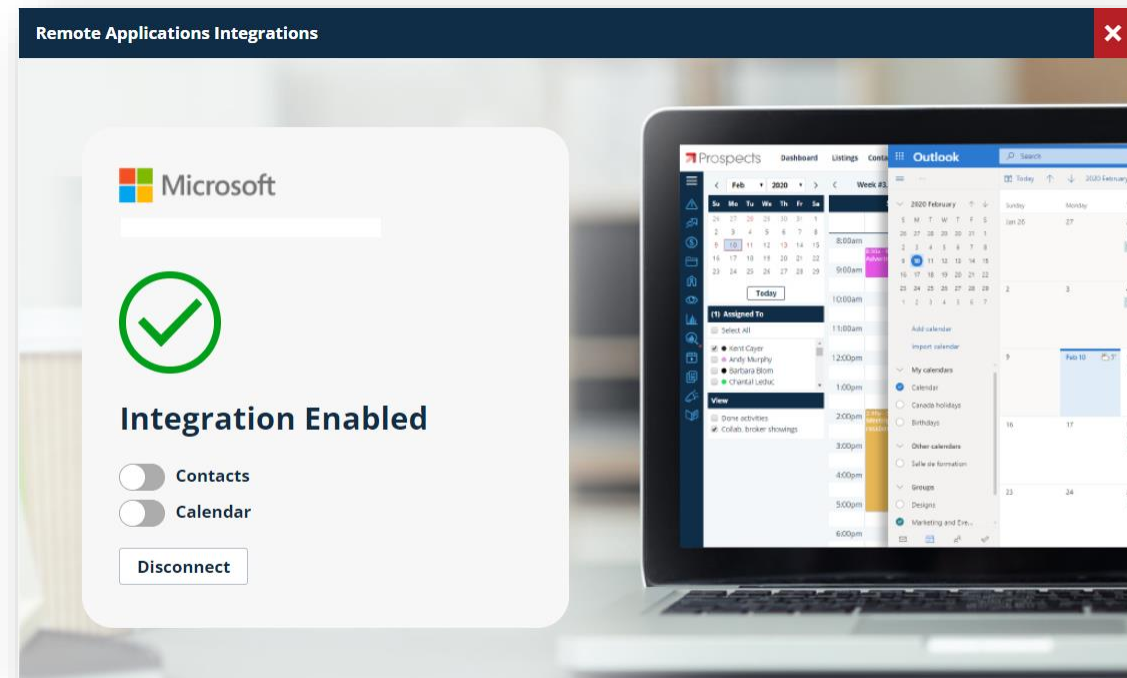


1. Once your account is connected, you will see the following screen. Use the toggle button to select the professional page(s) on which you want to publish your listings. The toggle button should appear in green and display **Yes** for activated pages.
2. Next, define the status updates of your listings that you wish to automatically publish on your **Facebook business page**.
3. If you want to customize the title of each post that will be published, you can do so directly under the **Post text** tab.
4. Activate the **Brand and Share** function to have your posts personalized with your logo and colors.
5. Click the *magnifying glass* icon to preview an example of the automated **Facebook** post.

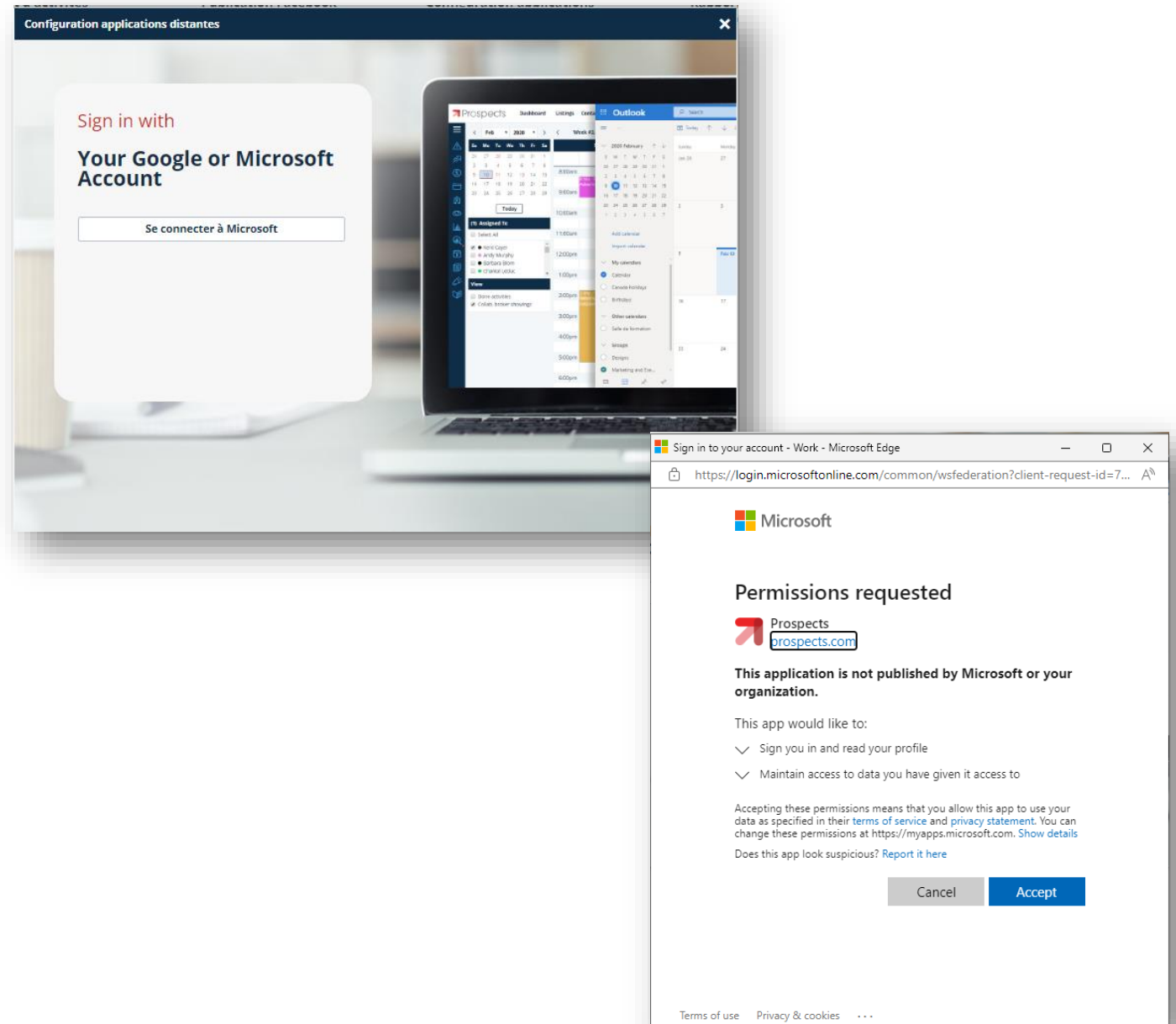


Remote Applications Integrations

- Be sure to contact technical support to have the feature enabled.
- Then click on ***Connect your account.***

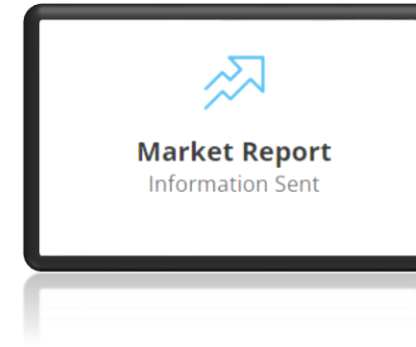


1. Click **Sign in to Microsoft** or **Sign in to Google**.
2. In the authorization window, click on **Accept**.
3. In the **Integration Enabled** window, you can enable contact synch as well as calendar synch.
4. You can close the window.
5. Make sure you have set up the chosen account in your mobile device in order to receive the data transfers.



Market Report

- Here, you will find the content of the email that your clients will receive with their *Market Report*.



Configuration + ×

Market Report
Configure the information displayed in market reports sent to your clients.

French Version **English Version** **Layout and Options**

Mail Subject
Market Report

Email Content (First Email) Add Contacts Information

[letterGreet],
Here is your market report to keep you informed of the latest market trends in your area. To view your report, click the link above.
If you have questions about this report or anything related to real estate, feel free to contact me.

Email Content (Subsequent Emails) Add Contacts Information

[letterGreet],
Here is your new market report to keep you informed of the latest market trends in your area. To view your report, click the link above.
If you have questions about this report or anything related to real estate, feel free to contact me.

Save **Save and Close**

1. On the **English Version** tab, you can modify the subject of the **Mail Subject** that will be sent, as well as the **Email Content** of the **First Email** and all **Subsequent Emails**.
2. If you wish to include information from your contact files, such as the greeting or the first and last name of your contacts, you can do so by placing the cursor at the desired location in the body of the email and then clicking on the drop-down menu on the right **Add contacts information**.
3. You can make changes to the French equivalent under the **French Version** tab. Your CRM will automatically send the email to your client in the language specified in their contact file.

Configuration

Market Report

Configure the information displayed in market reports sent to your clients.

French Version **English Version** **Layout and Options**

Mail Subject
Market Report

Email Content (First Email) Add Contacts Information
[letterGreet].
Here is your market report to keep you informed of the latest market trends in your area. To view your report, click the link above.
If you have questions about this report or anything related to real estate, feel free to contact me.

Email Content (Subsequent Emails) Add Contacts Information
[letterGreet].
Here is your new market report to keep you informed of the latest market trends in your area. To view your report, click the link above.
If you have questions about this report or anything related to real estate, feel free to contact me.

Save Save and Close

Configuration

Market Report

Configure the information displayed in market reports sent to your clients.

French Version **English Version** **Layout and Options**

Mail Subject
Market Report

Email Content (First Email) Add Contacts Information
[letterGreet].
Here is your market report to keep you informed of the latest market trends in your area. To view your report, click the link above.
If you have questions about this report or anything related to real estate, feel free to contact me.

Email Content (Subsequent Emails) Add Contacts Information
[letterGreet].
Here is your new market report to keep you informed of the latest market trends in your area. To view your report, click the link above.
If you have questions about this report or anything related to real estate, feel free to contact me.

Save Save and Close

Configuration

Market Report

Configure the information displayed in market reports sent to your clients.

French Version **English Version** **Layout and Options**

Mail Subject
Rapport de Marché

Email Content (First Email) Add Contacts Information
[letterGreet].
Voici votre rapport de marché afin de vous tenir informé des dernières tendances du marché dans votre quartier/région. Pour accéder à votre rapport, cliquez sur le lien ci-dessus.
Si vous avez des questions à propos de ce rapport ou toutes autres questions sur l'immobilier, n'hésitez pas à écrire à nous pour accéder.

Email Content (Subsequent Emails) Add Contacts Information
[letterGreet].
Voici votre nouveau rapport de marché afin de vous tenir informé des dernières tendances du marché dans votre quartier/région. Pour accéder à votre rapport, cliquez sur le lien ci-dessus.
Si vous avez des questions à propos de ce rapport ou toutes autres questions sur l'immobilier, n'hésitez pas à écrire à nous pour accéder.

Save Save and Close

1. Under the third tab, **Layout and options**, you will have the possibility to select the **Header to Display** (see **Personalization Guide** for more information).
2. You may also choose in which situation you would like to receive notifications.
3. If you would like to offer your clients the possibility of requesting a **Market Report** directly from your website, click the **Send the instructions to my webmaster** button and follow the on-screen steps to send him/her the installation guide.
4. Save your changes by clicking the red **Save** or **Save and Close** button.

Configuration

Market Report

Configure the information displayed in market reports sent to your clients.

French Version English Version **Layout and Options**

Select the Header to Display

Personal Header Preview

Please choose when you wish to receive notifications

Everytime a market report is sent On errors only Never

Lead Capture Form

Let your clients request a Market Report right from your own website. To proceed, simply send the following instructions to your webmaster.

Send the instructions to my webmaster

Configuration

Market Report

Configure the information displayed in market reports sent to your clients.

French Version English Version **Layout and Options**

Select the Header to Display

Personal Header Preview

Please choose when you wish to receive notifications

Everytime a market report is sent On errors only Never

Lead Capture Form

Let your clients request a Market Report right from your own website. To proceed, simply send the following instructions to your webmaster.

Send the instructions to my webmaster

Save Save and Close

Prospects for Teams

- The team administrator manages all of the rights for each team member.
- In the **Team Members** tab, you have an overview of the roles assigned to your team members as well as the rights granted to each of them.
- To change the role settings within your team, navigate to the second tab called **Role Management**.
- Add a role simply by clicking on **New Role**, then provide the **Role name**. Click the **Ok** button to save your addition.

Team Rights Management

Team Rights Management
Assign rights to each member of your team.

Team Members Role Management

Rights Charles Dr.. Karine Bou.. Chantal Le.. Patricia L..

Assigned Role: Default Role Assistant Broker/Agent Broker/Agent

Right	Charles Dr..	Karine Bou..	Chantal Le..	Patricia L..
Delete Contacts	Yes	Yes	No	No
Export Contacts	Yes	No	No	No
Mobile Sync	Yes	No	Yes	Yes
View Activities	Yes	Yes	Yes	Yes
View Transactions	Yes	Yes	No	No
Edit Contacts' Notes	Yes	Yes	Yes	Yes
Edit Activities' Notes	Yes	Yes	Yes	Yes
Edit Listings' Notes	Yes	Yes	Yes	Yes
Global Edit on Contacts	Yes	Yes	No	No
Edit Action Plans and Text Templates	Yes	Yes	No	No

Save Save and Close

Team Rights Management

Team Rights Management
Assign rights to each member of your team.

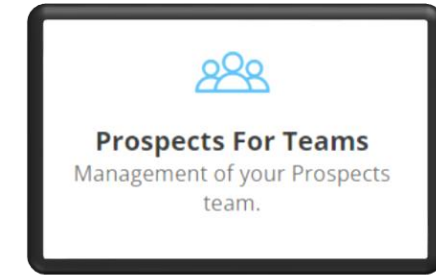
Team Members Role Management

+ New Role Modify

Rights Default Role Assistant Broker/Agent

Right	Default Role	Assistant	Broker/Agent
Delete Contacts	Yes	Yes	No
Export Contacts	Yes	No	No
Mobile Sync	Yes	No	Yes
View Activities	Yes	Yes	Yes
View Transactions	Yes	Yes	No
Edit Contacts' Notes	Yes	Yes	Yes
Edit Activities' Notes	Yes	Yes	Yes
Edit Listings' Notes	Yes	Yes	Yes
Global Edit on Contacts	Yes	Yes	No
Edit Action Plans and Text Templates	Yes	Yes	No

Save Save and Close



Team Rights Management

Team Rights Management
Assign rights to each member of your team.

Team Members Role Management

+ New Role Modify

Rights Default Role Assistant Broker/Agent

Right	Default Role	Assistant	Broker/Agent
Delete Contacts	Yes	Yes	No
Export Contacts	Yes	No	No
Mobile Sync	Yes	No	Yes
View Activities	Yes	Yes	Yes
View Transactions	Yes	Yes	No
Edit Contacts' Notes	Yes	Yes	Yes
Edit Activities' Notes	Yes	Yes	Yes
Edit Listings' Notes	Yes	Yes	Yes
Global Edit on Contacts	Yes	Yes	No
Edit Action Plans and Text Templates	Yes	Yes	No

Save Save and Close

- Once a new role is created, customize the rights granted to that role using the list below it. Slide the toggle switches to **Yes**. Activated rights will be displayed in green.
- Save your changes by clicking the red **Save** button.
- Now you must assign the roles you created to each of your team members. Select the **Team Members** tab.
- Using the drop-down menu, select the role you wish to grant your teammate.

