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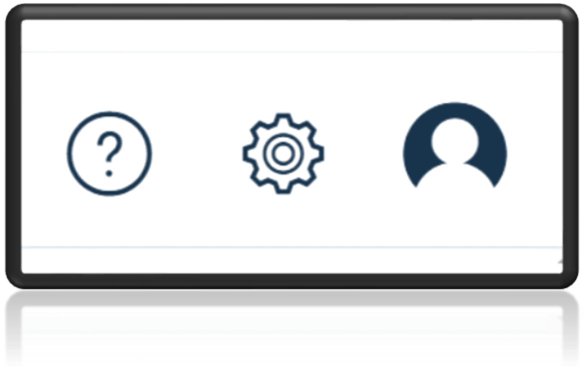
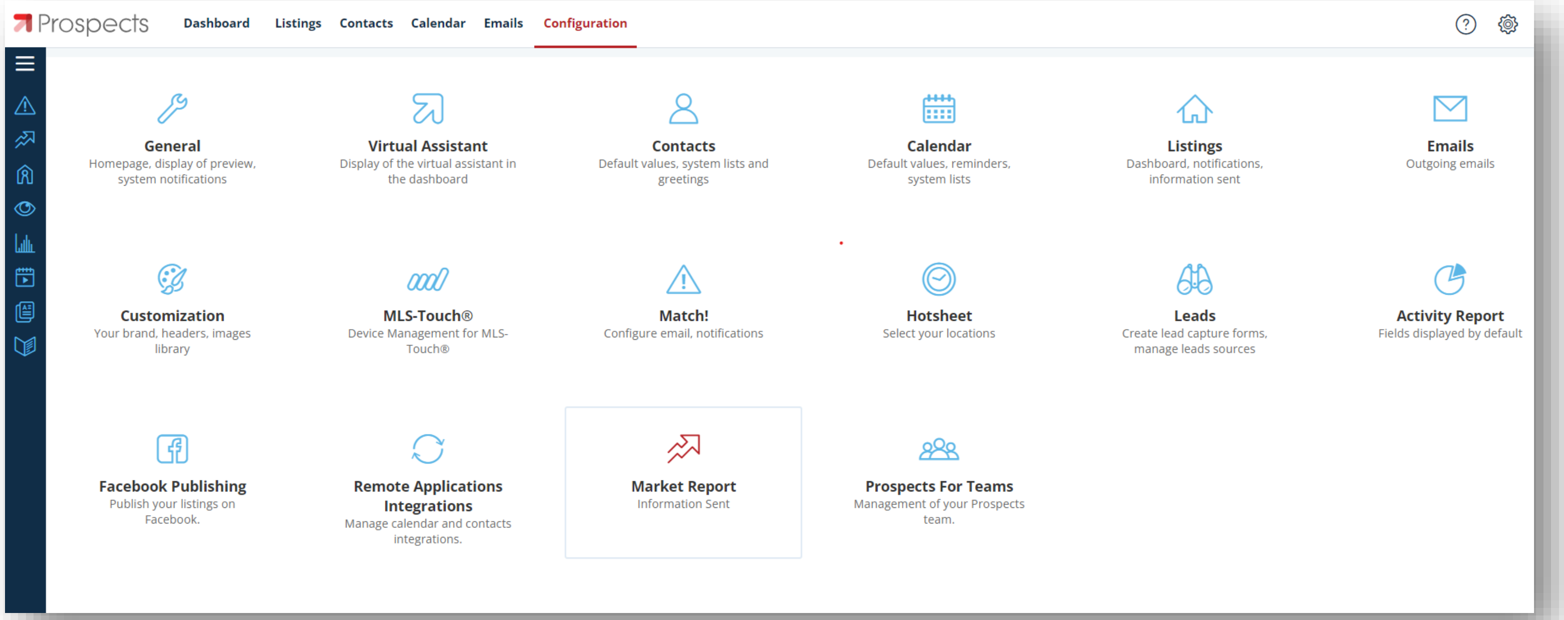
How to access the configuration of your software



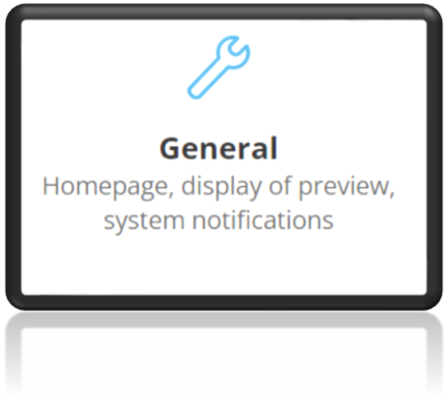
- From the  menu located in the upper right corner of your software, you can access the configuration of your software.

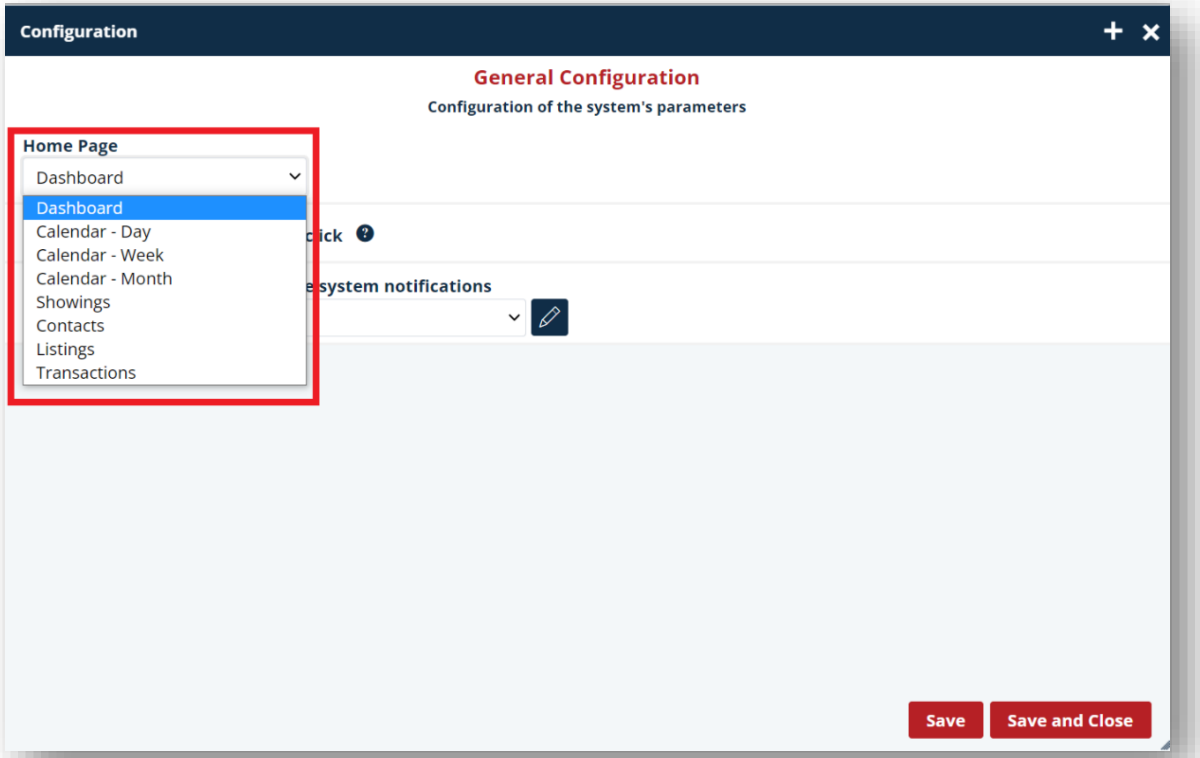


General

- 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.



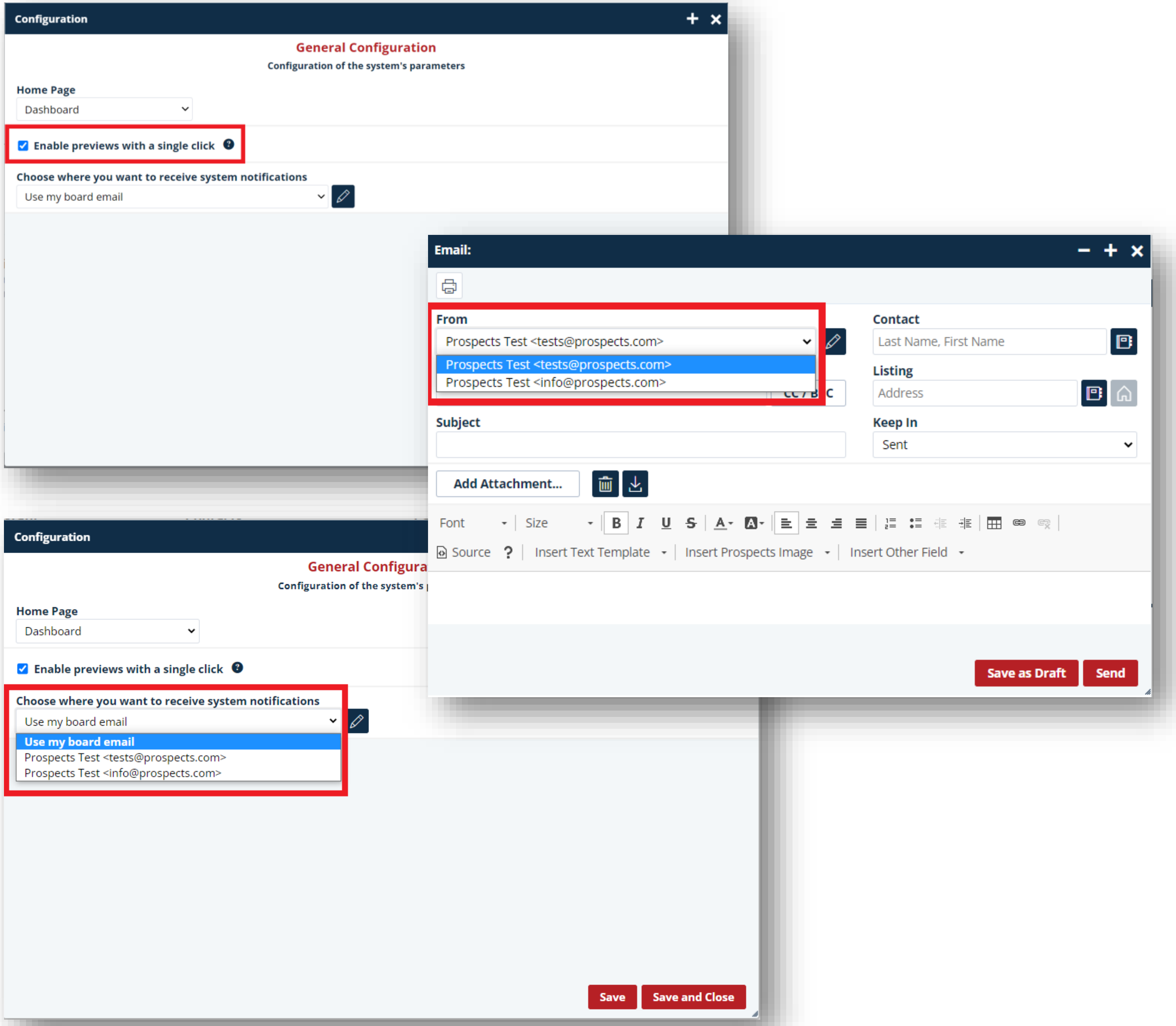


1. The next feature allows you to display a preview with a single click on items like the Contact Files, Listings Files, Transactions, Reports, Activities, etc.

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.

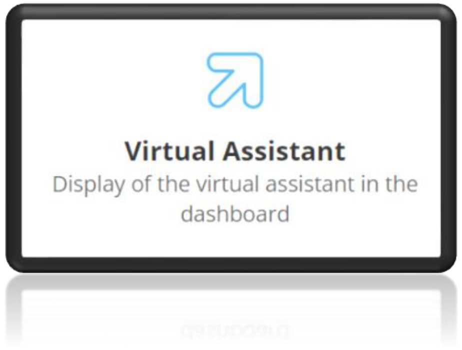
4. Save your changes by clicking the red ***Save*** or ***Save and Close*** button.

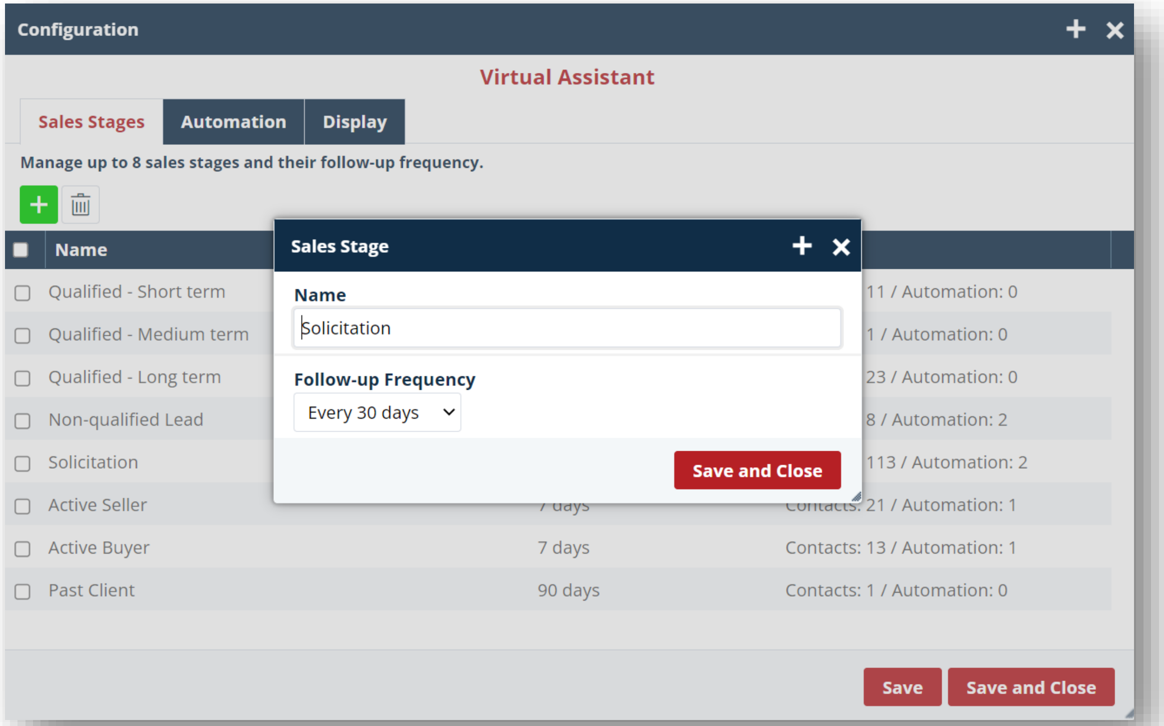


Virtual Assistant

- 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***.



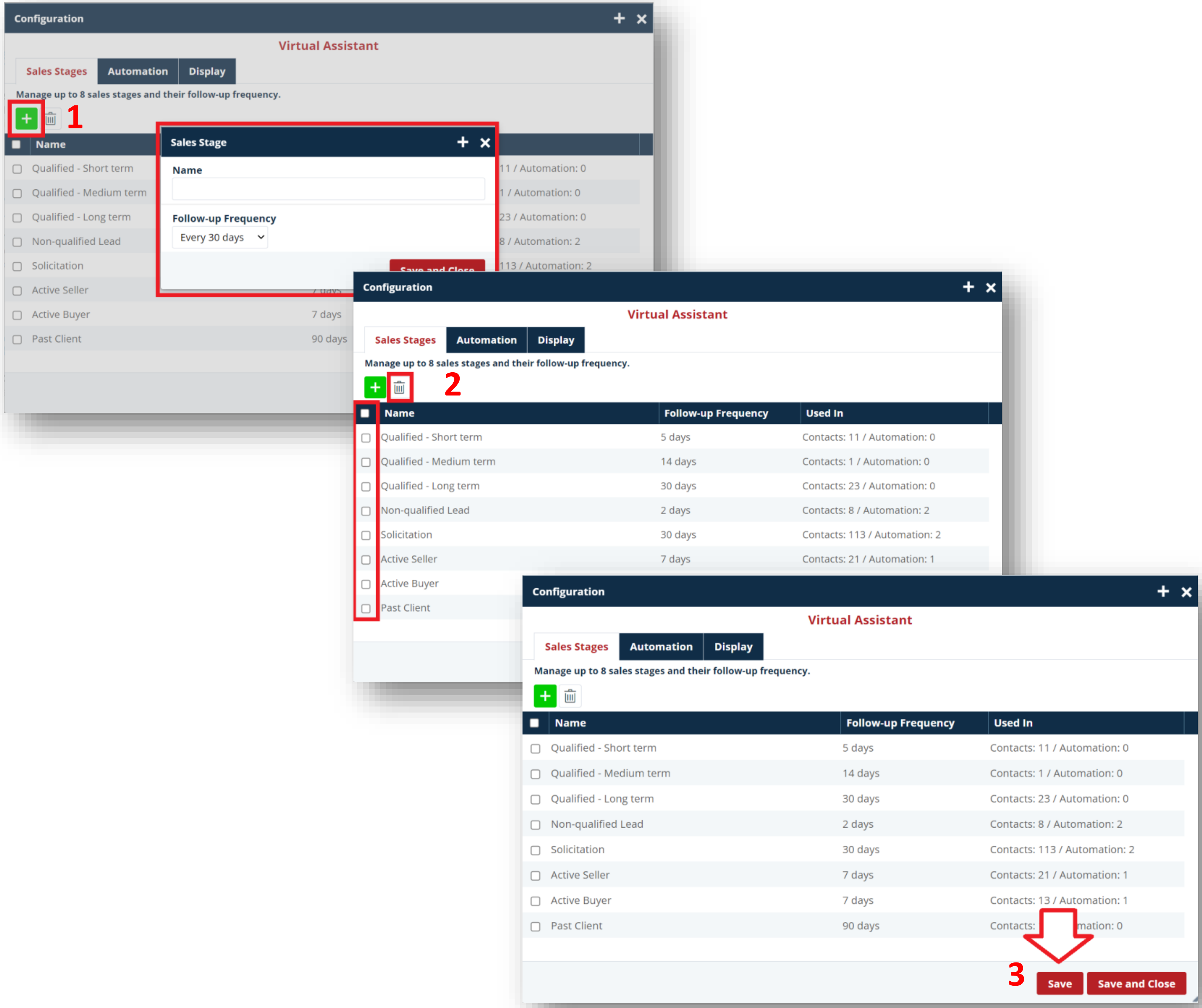


1. To add a new one, click on the “+” icon. The ***Name*** and ***Follow-up Frequency*** can then be added.

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*.



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.

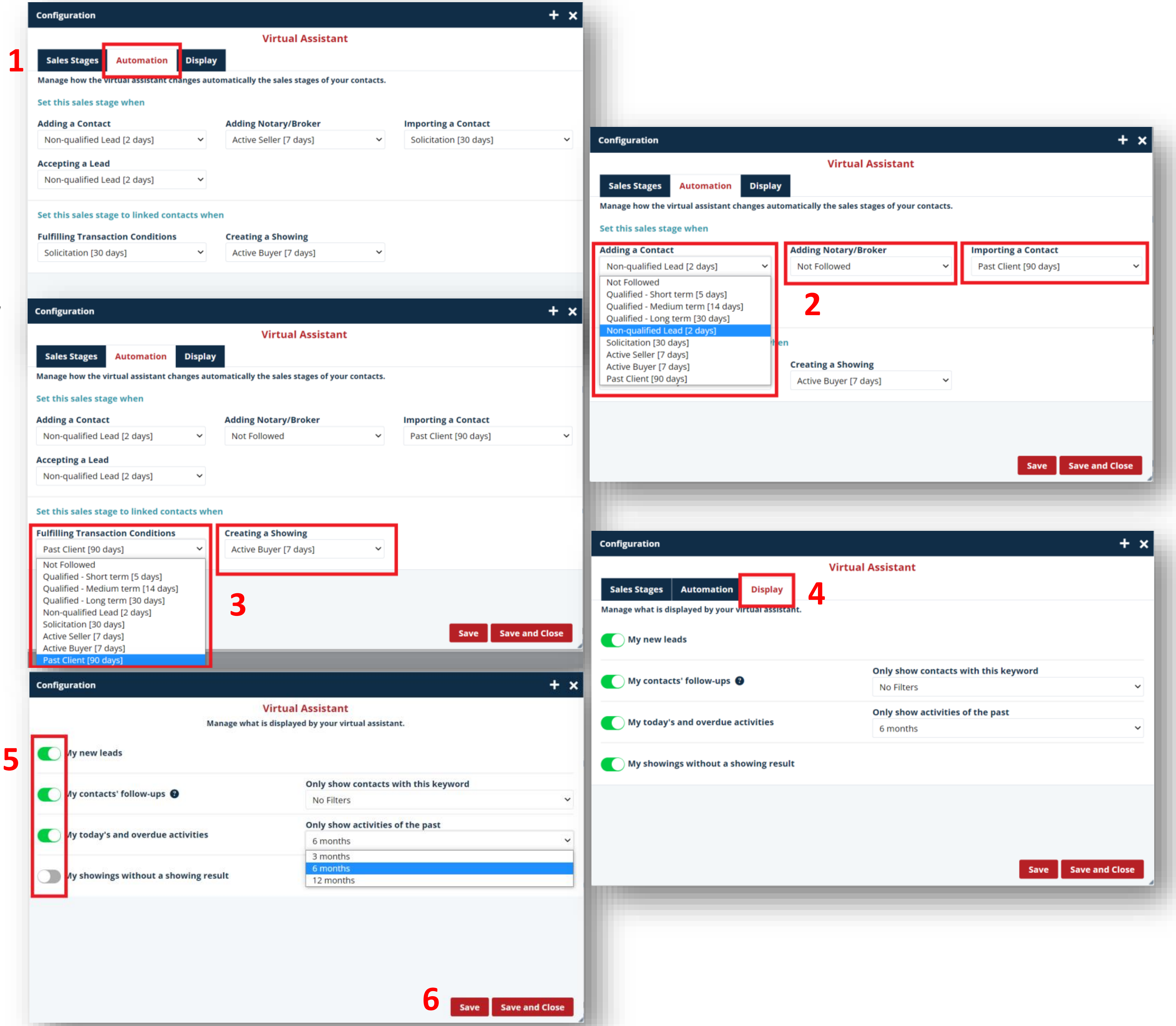
2. When ***Adding a Contact*** file, when ***Importing a Contact*** and when ***Accepting a Lead***.

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.

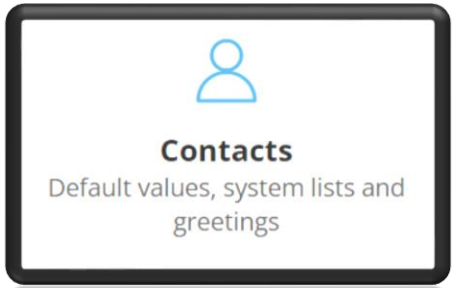
6. When you're done, click ***Save and Close***.

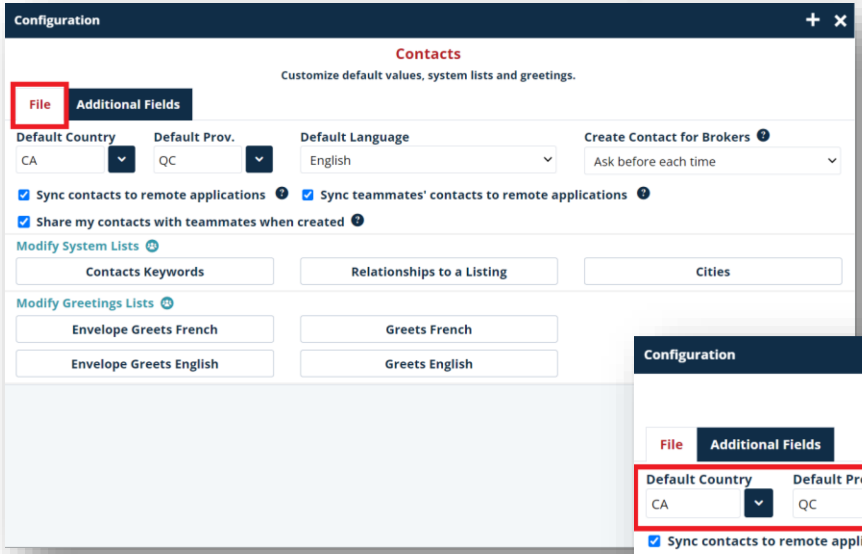


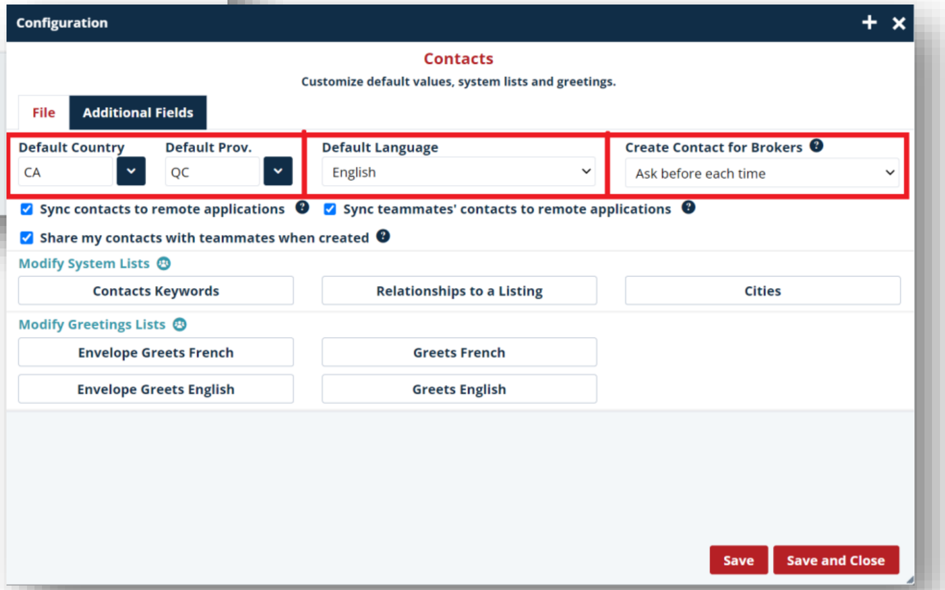
Contacts

- 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.







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

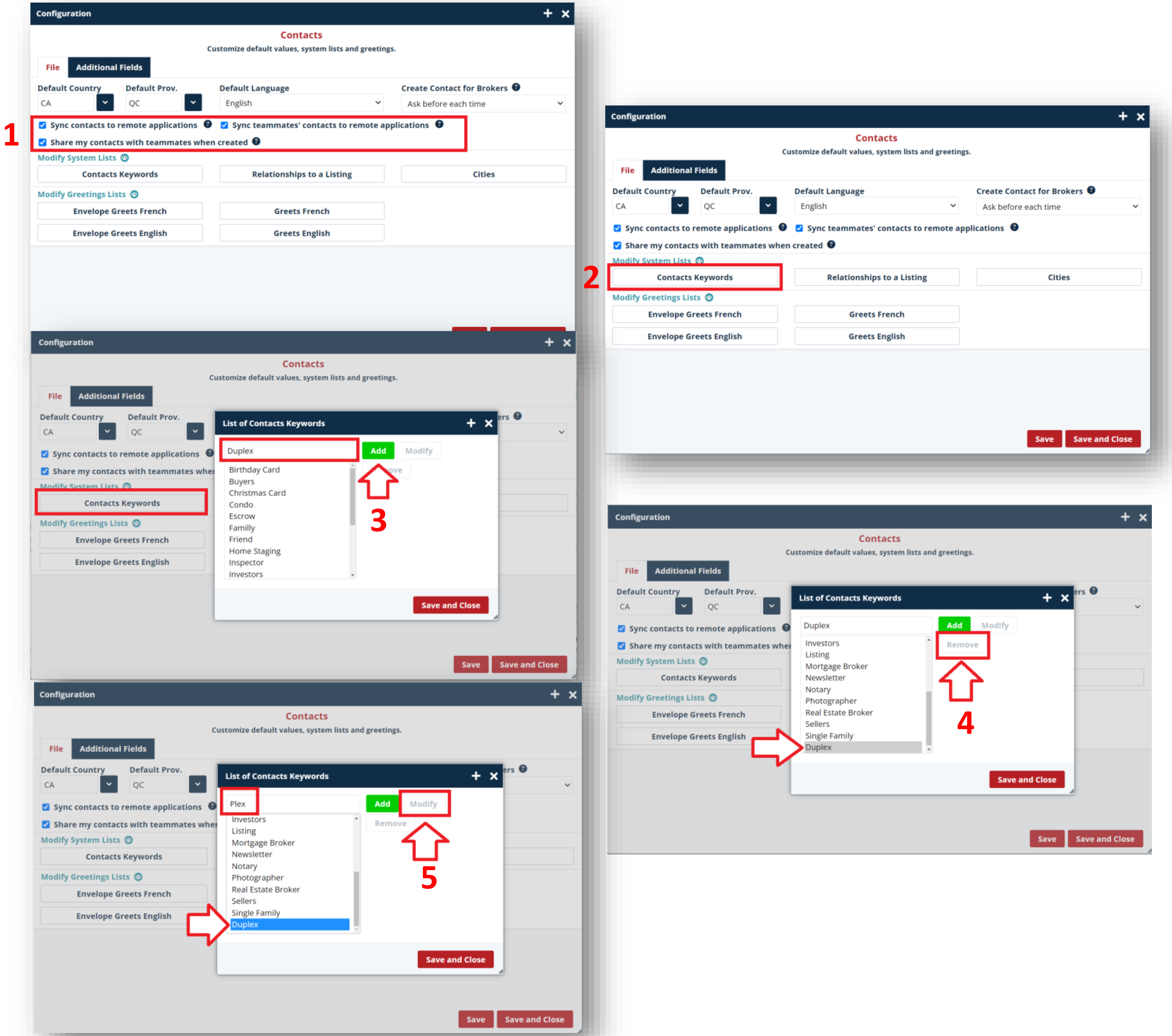
1. The following options allow you to share your contacts with other applications or with your teammates. Check the options you need to enable.

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

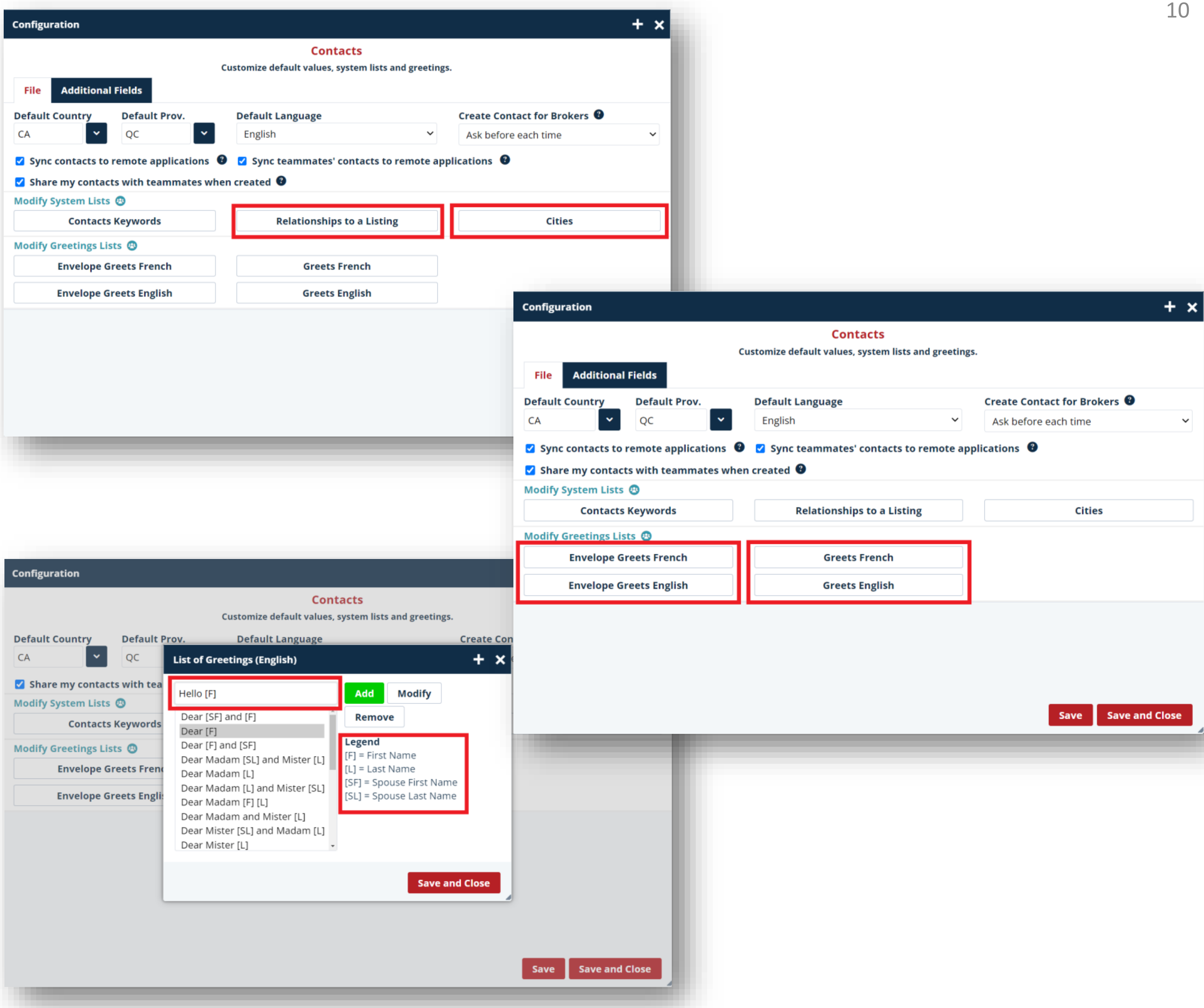
3. After clicking on the ***Contact Keywords*** button, enter a new *keyword*, then click on the ***Add*** button to add the new *keyword* to the list.

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.

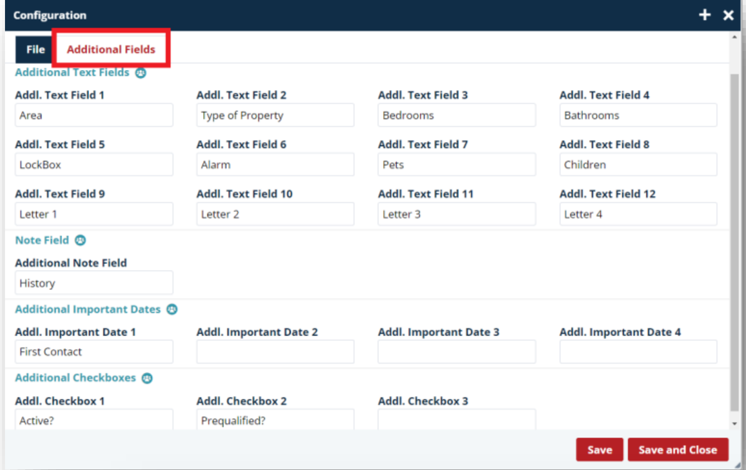


1. Use these same methods to customize the list of ***Relationships to a Listing*** and the list of ***Cities***...
2. ...as well as in the ***Envelope Greets*** and letter ***Greets*** lists.
3. When adding new *letter greeting*, it is important to use ***dynamic references*** as shown in the ***Legend***.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



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



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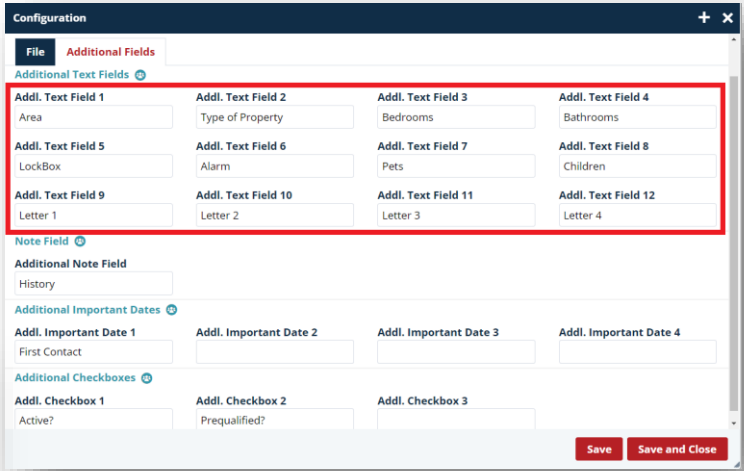

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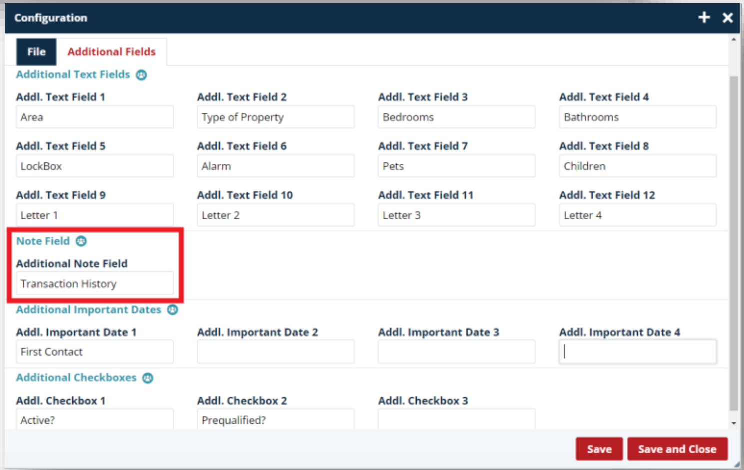

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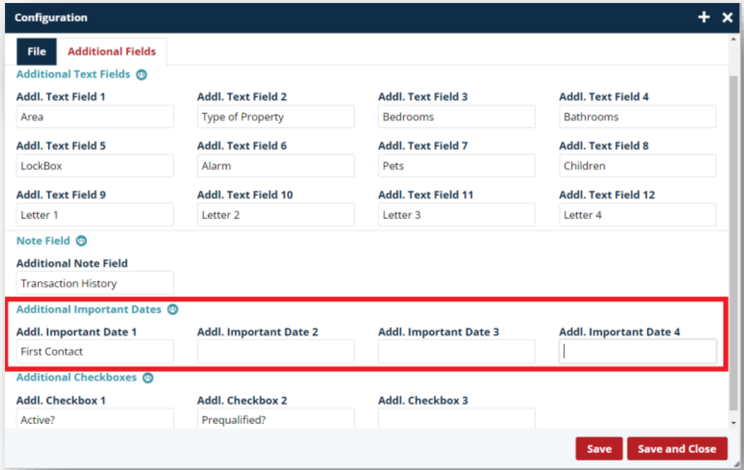

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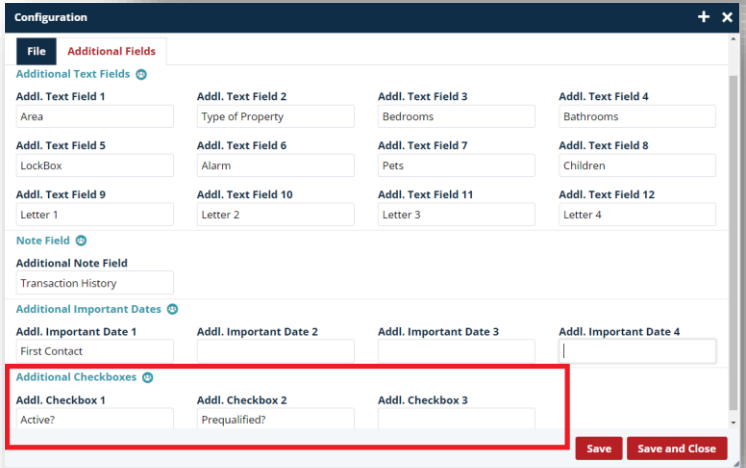
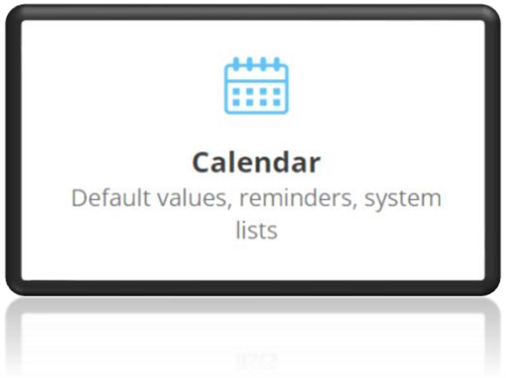
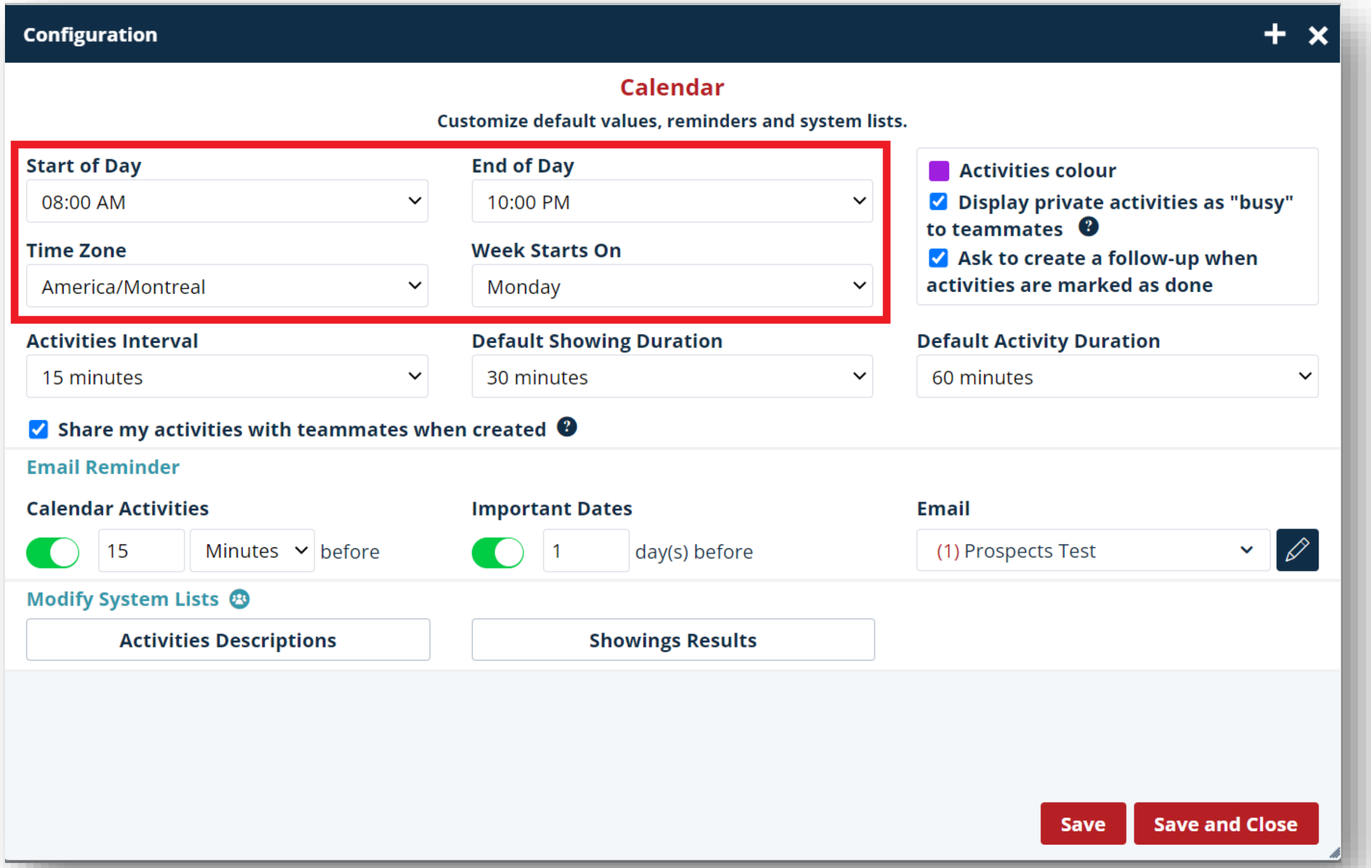


Calendar

- 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.



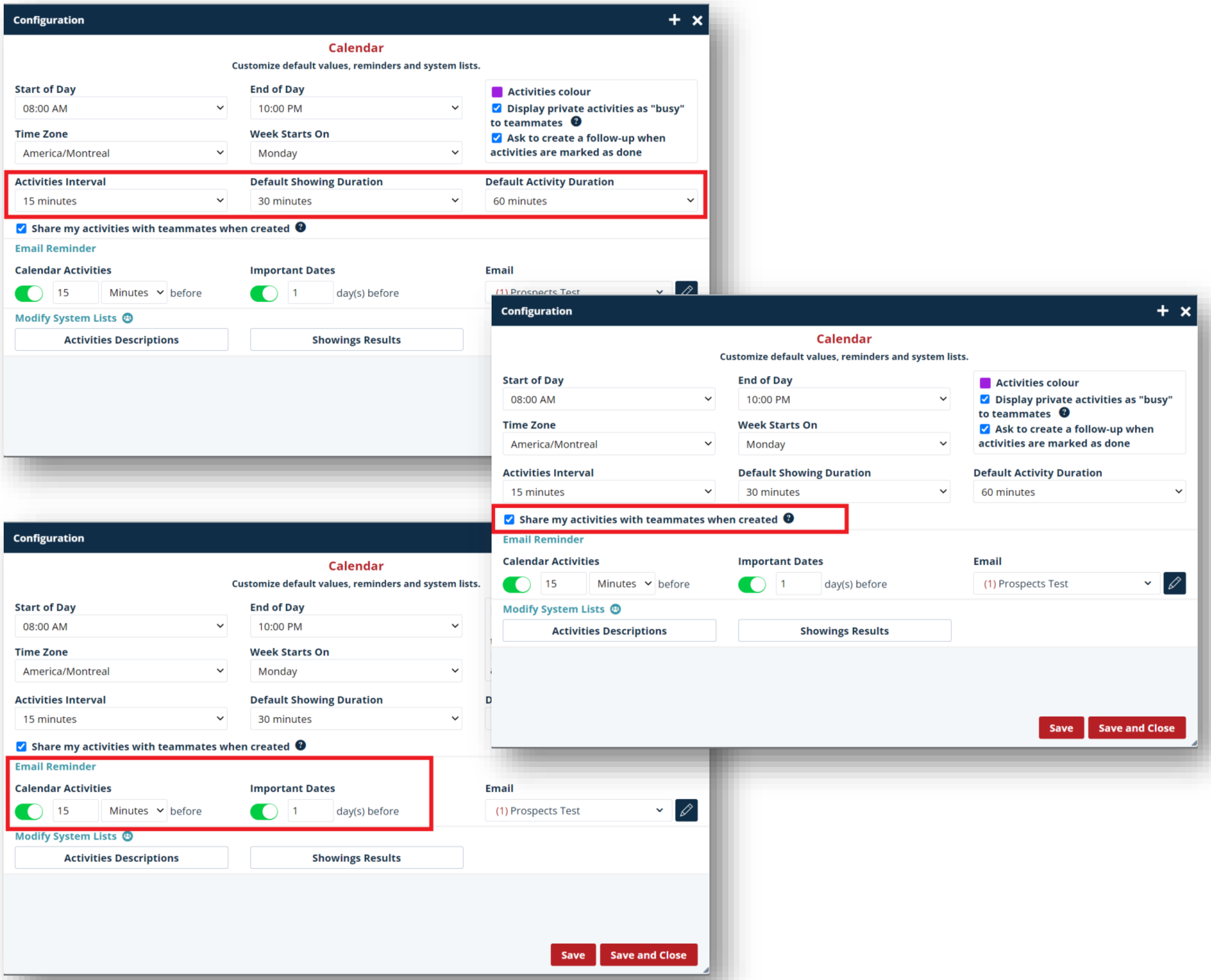


1. Next, set the default interval and duration for activities and showings.

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***.

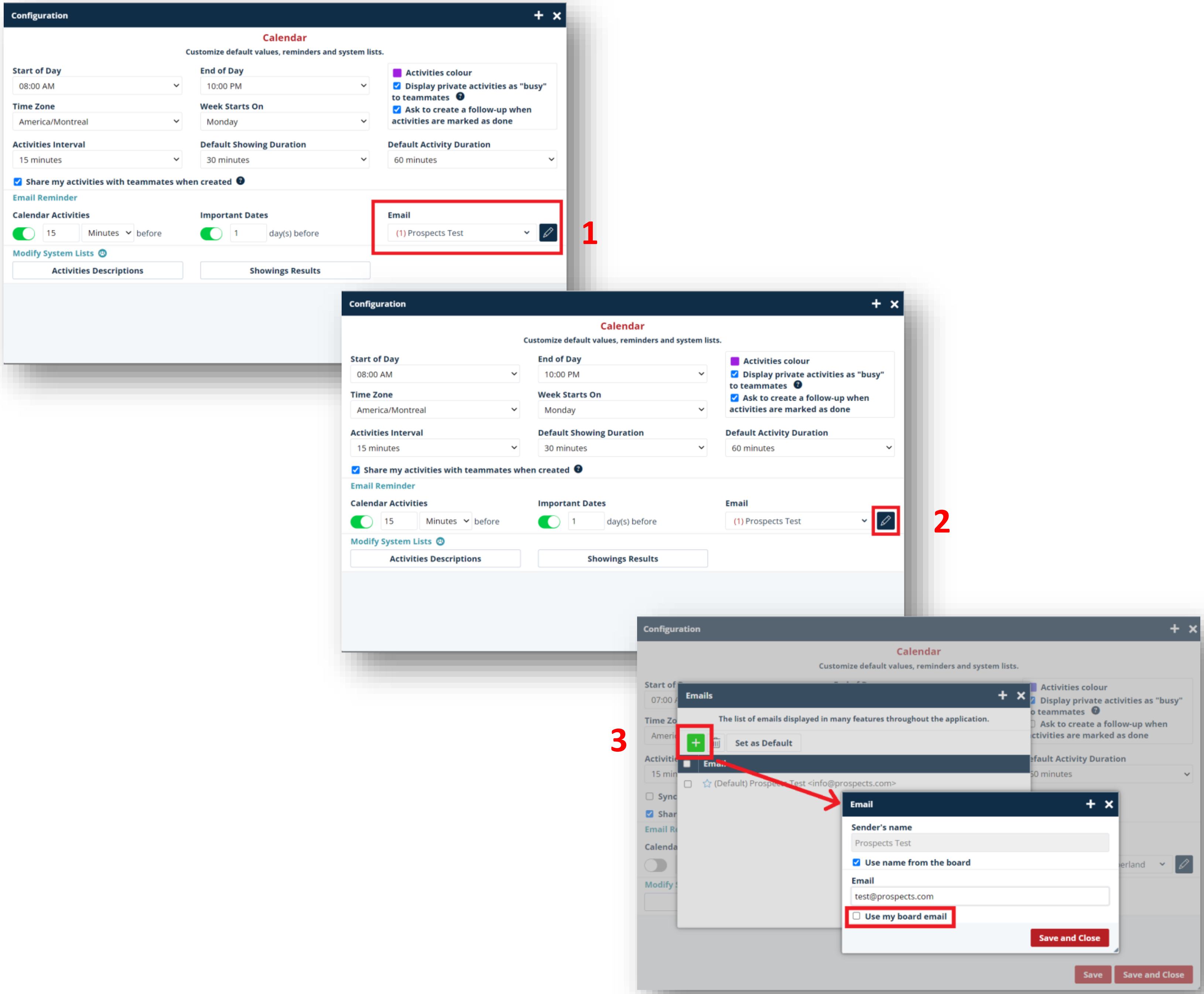
4. You can enable the default ***Email Reminders*** related to your calendar activities. Activate the function and select the desired delay.



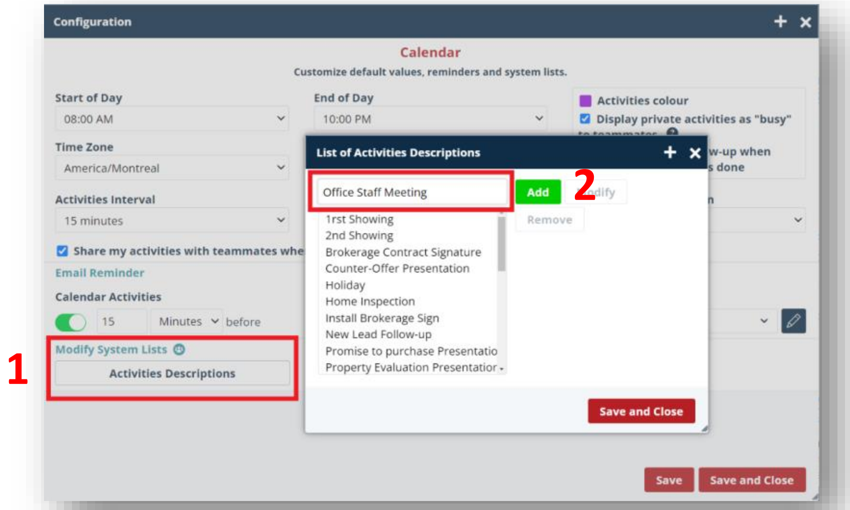
1. Click on the drop-down menu to select the ***Email*** where the reminders will be sent,

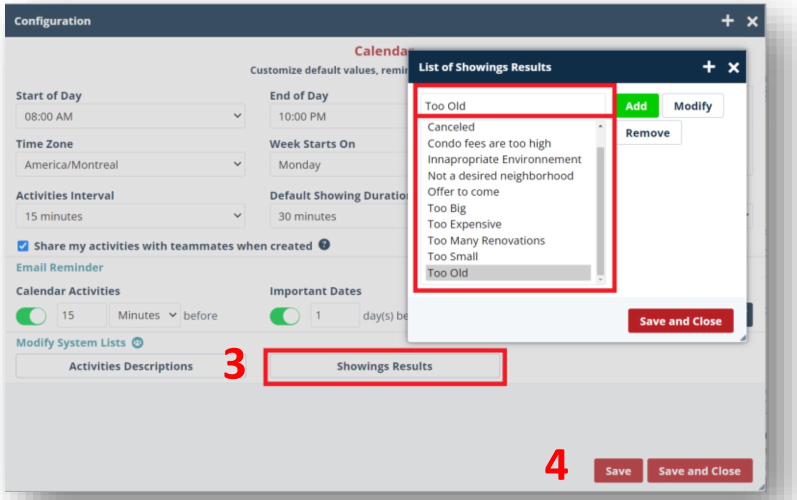
2. or click on the *pencil* icon to add or modify an email address.

3. The "***+***" icon allows you to add an email address. Uncheck the box to unlock the field.



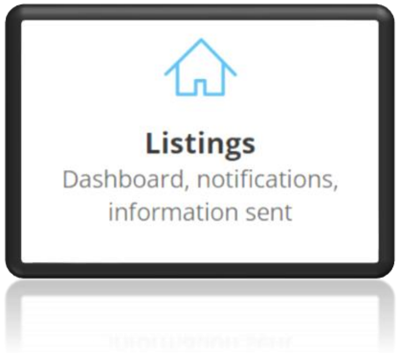
1. The ***Activities Descriptions*** list allows you to customize the titles of the activities you will use most frequently.
2. After clicking on the ***Activities Descriptions*** button, it will be possible to enter a new title, then press the ***Add*** button. Click ***Save and Close*** to save the 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.

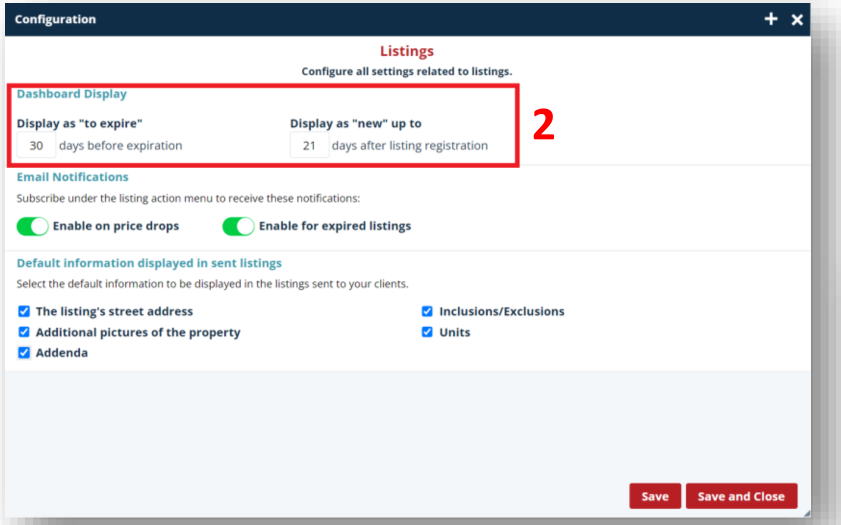


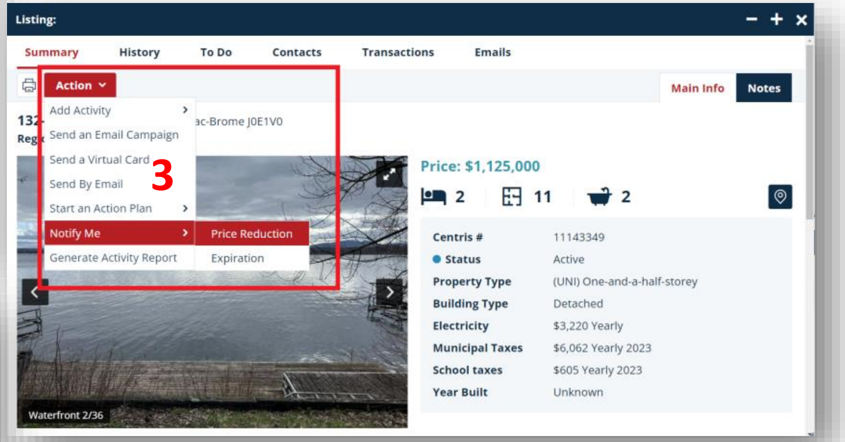


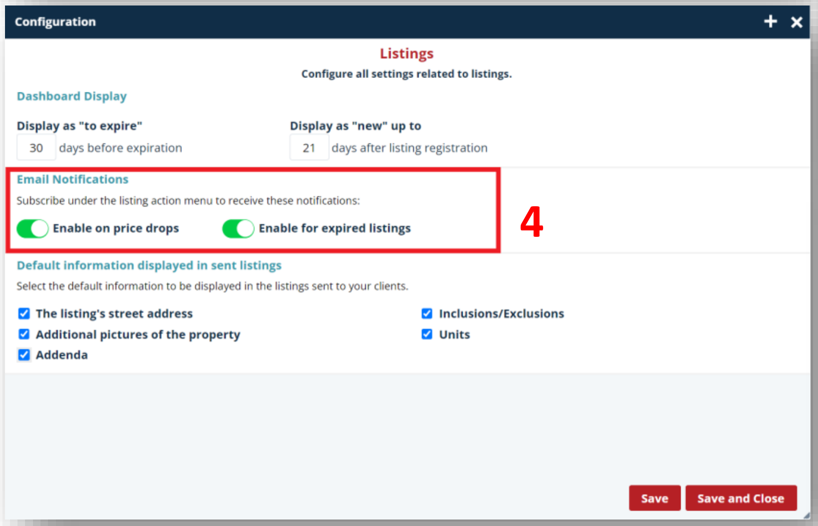
Listings

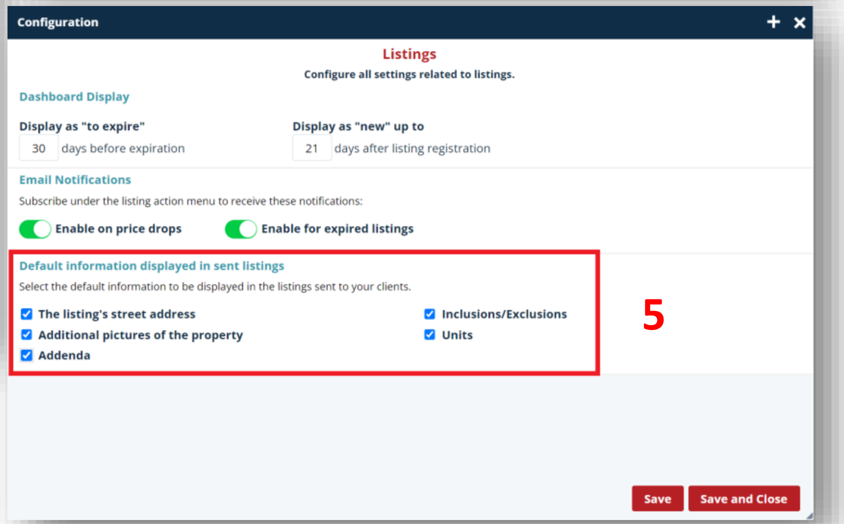
1. The ***Dashboard Display*** allows you to change the number of days your listings will appear as *"to expire"* and as *"new"* in your dashboard.
2. From a listing file, you can activate the ***Notify Me*** feature to ensure you don't miss a price drop and/or the expiration date for that property.
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.

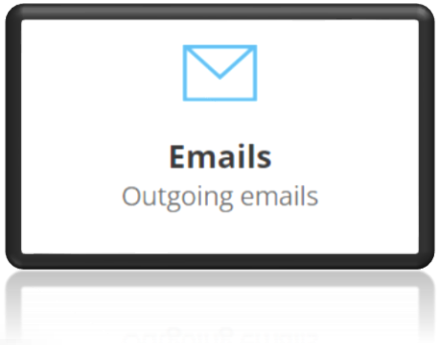






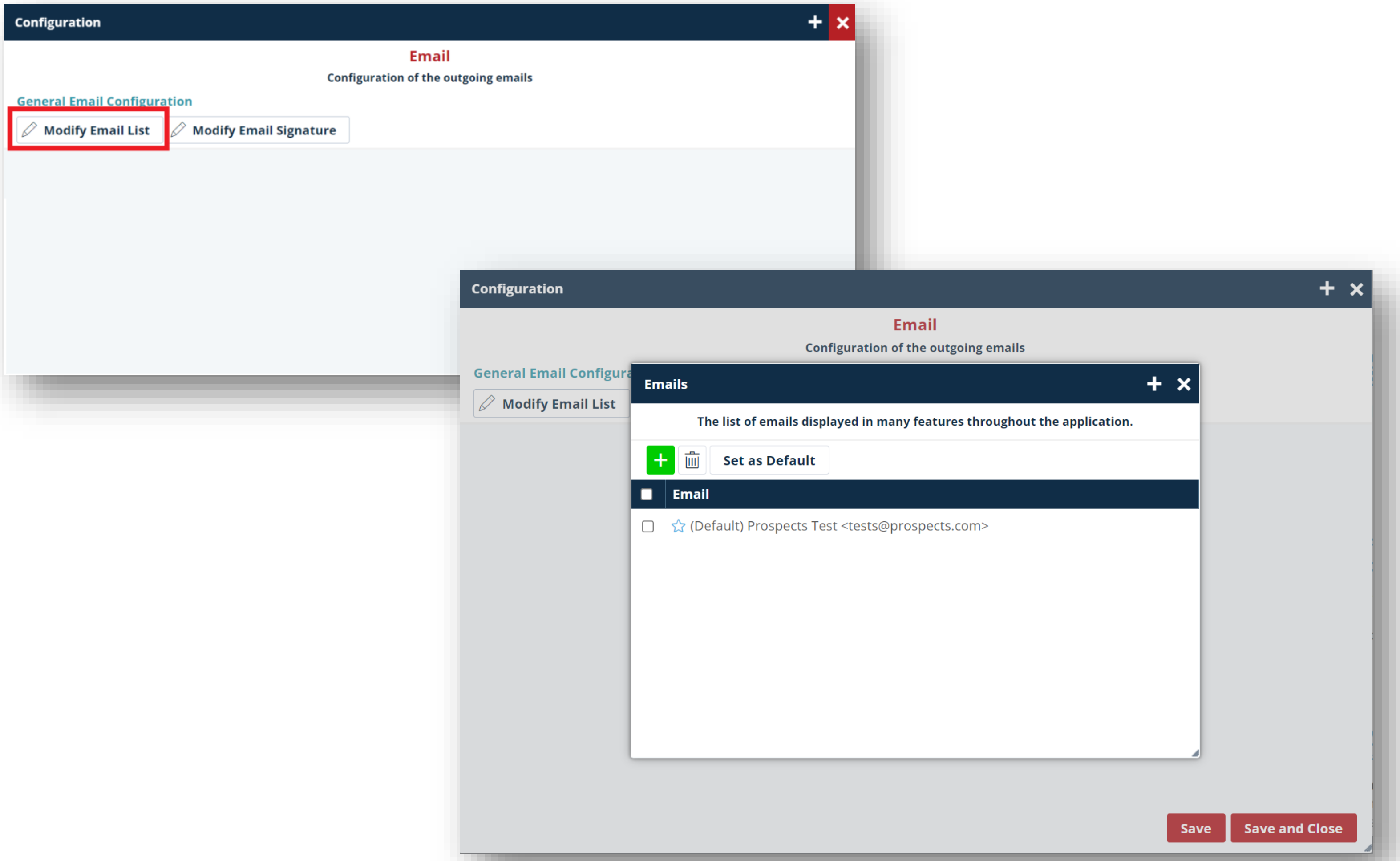






Emails

- 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.

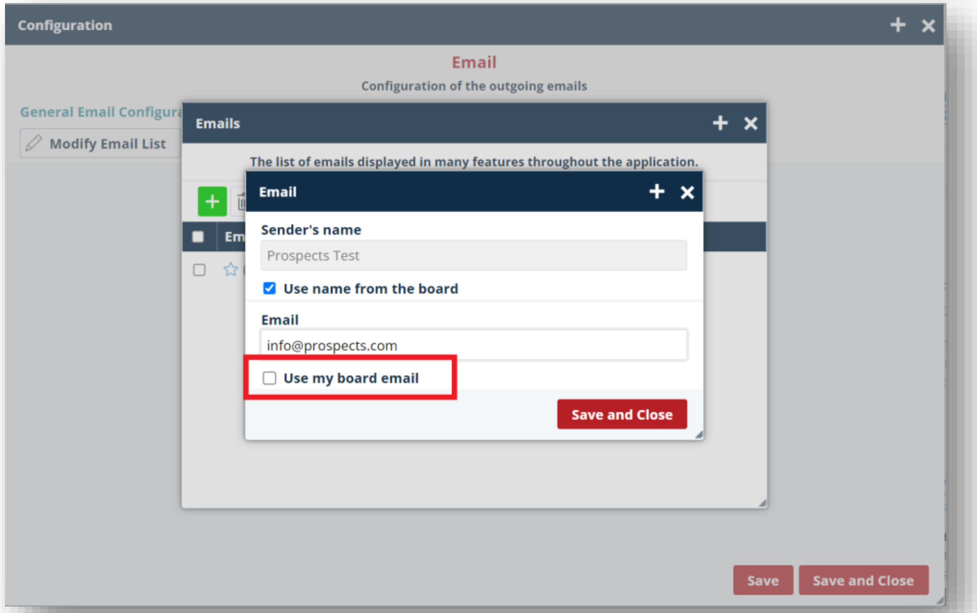


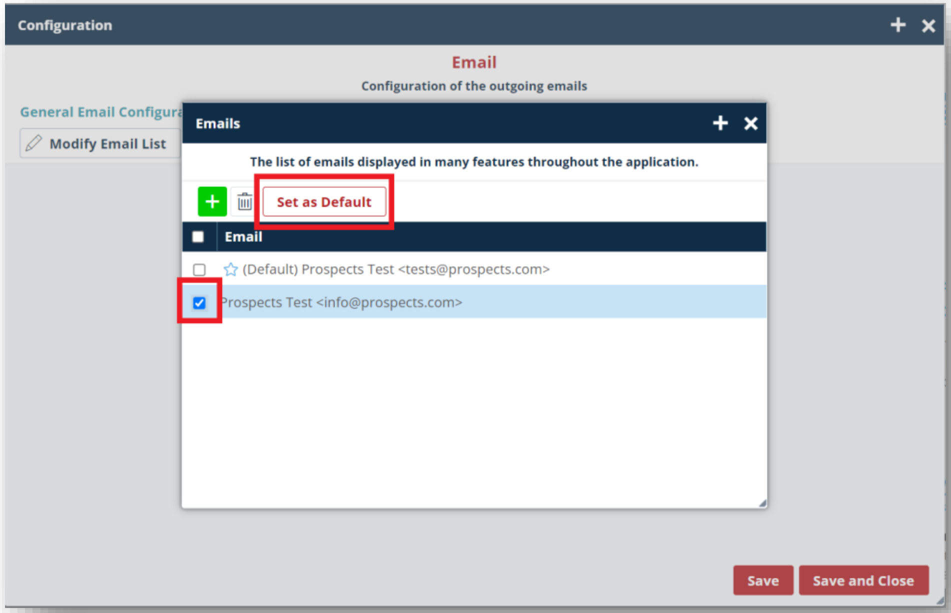
1. The system uses your default real estate board email.

2. If you wish to change this email, uncheck the ***Use my board email*** box.

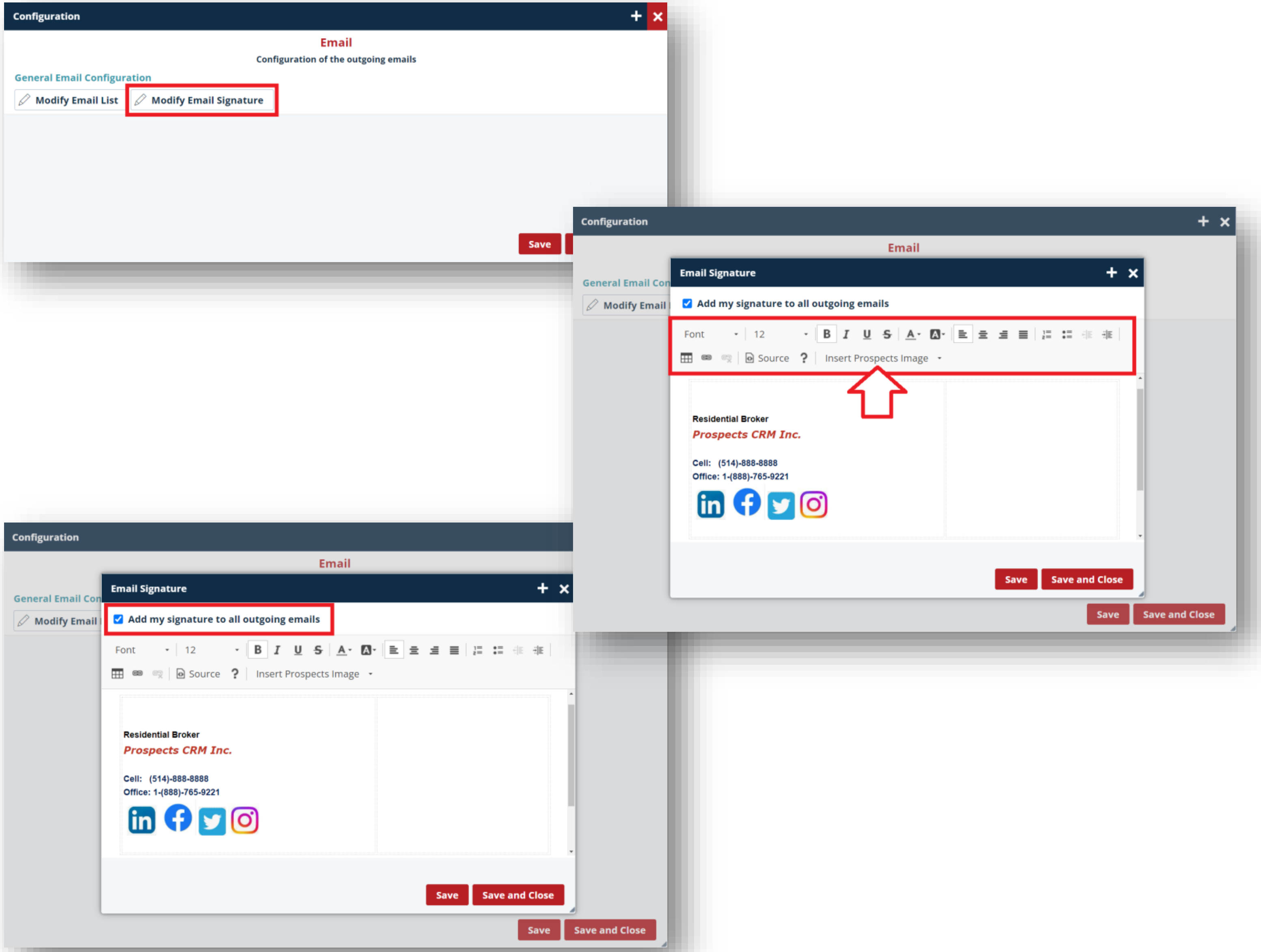
3. To identify the email that the system should use by default, check it and click on the ***Set as default*** button, then on the ***"X"*** to close the window.

4. Remember to ***Save and Close*** once you have changed your email address.





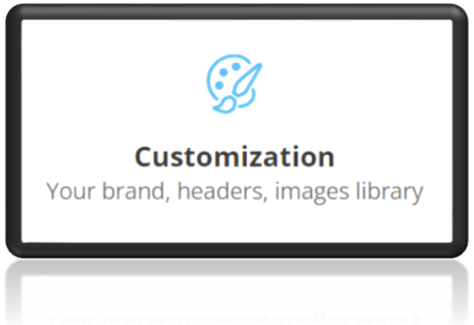
1. Select the ***Modify Email Signature*** option to customize your email signature.
2. Use the toolbar to add formatting to your text.
3. You can also import your own signature by inserting it as a *Prospects image*.
4. Make sure the ***Add my signature to all outgoing emails*** box is checked if you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

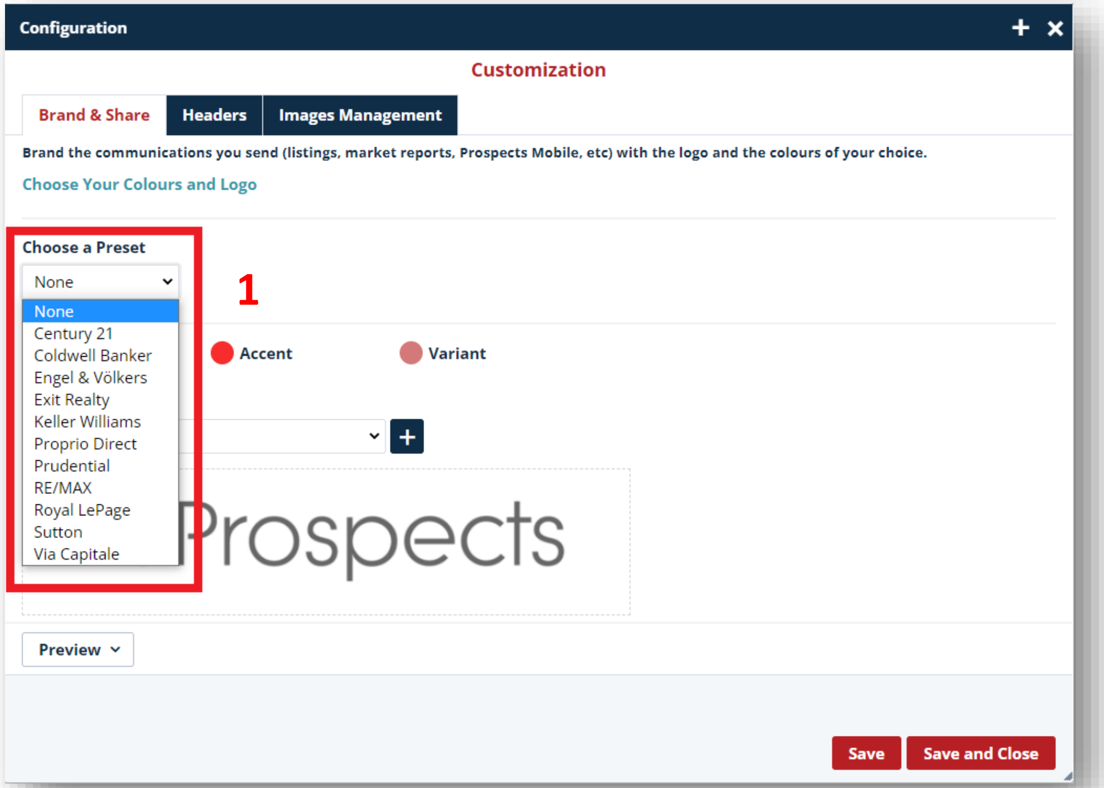


Customization

- Personalize your marketing content with your brand image, your colors and contact information.

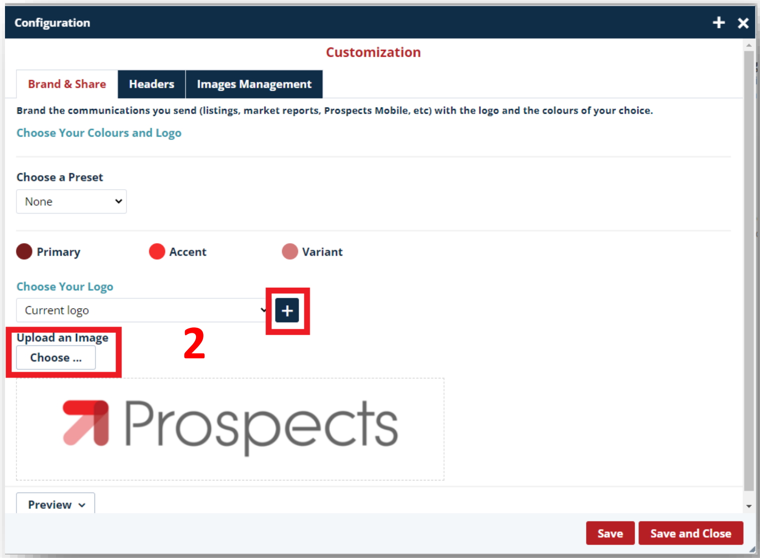
- ***Presets*** have been made available to you to quickly configure. Click on the drop-down menu to select your banner from the list.



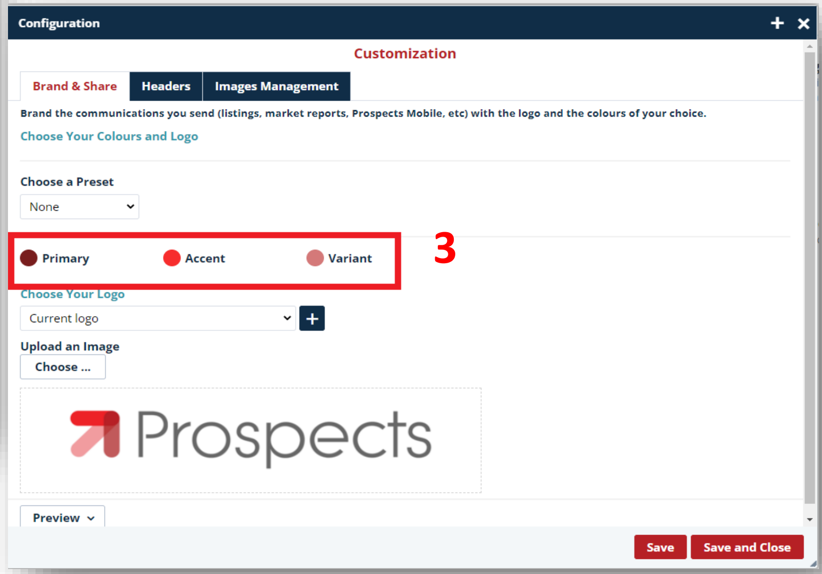


1. If your banner is not listed, or if you prefer to insert your personalized logo, select the ***None*** option.

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.

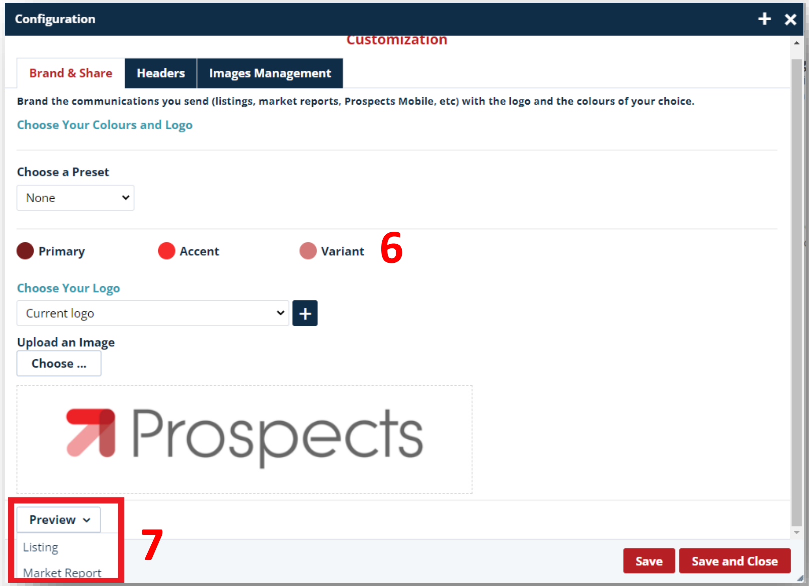


4. Click and drag the arrows on the center bar to choose your color, then click and drag the circle to choose the shade you prefer.

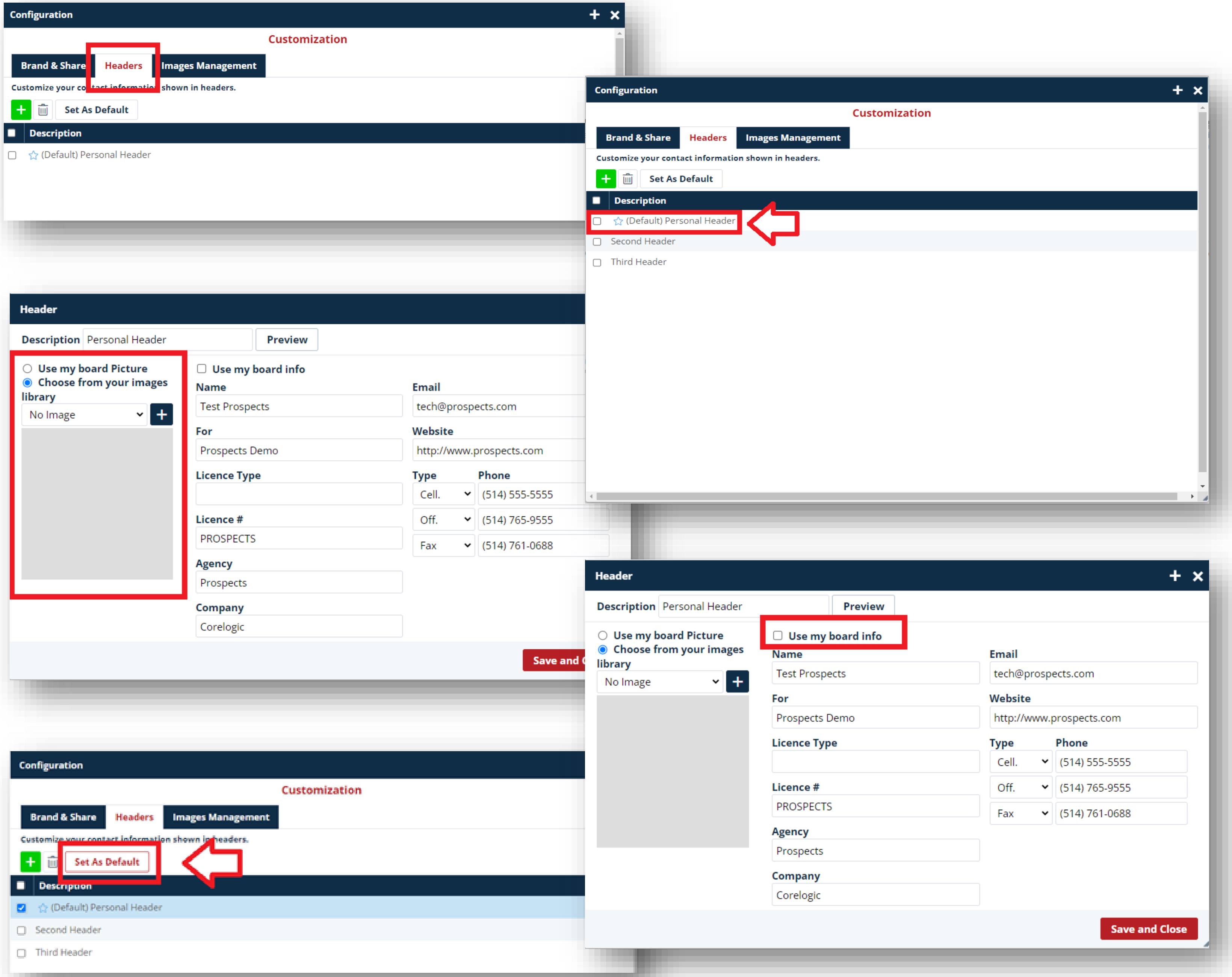
5. It is also possible to enter the color code in the "***#***" box.

6. When your color selection is complete, click outside the black box. Repeat these steps for the selection of the other 2 colors.

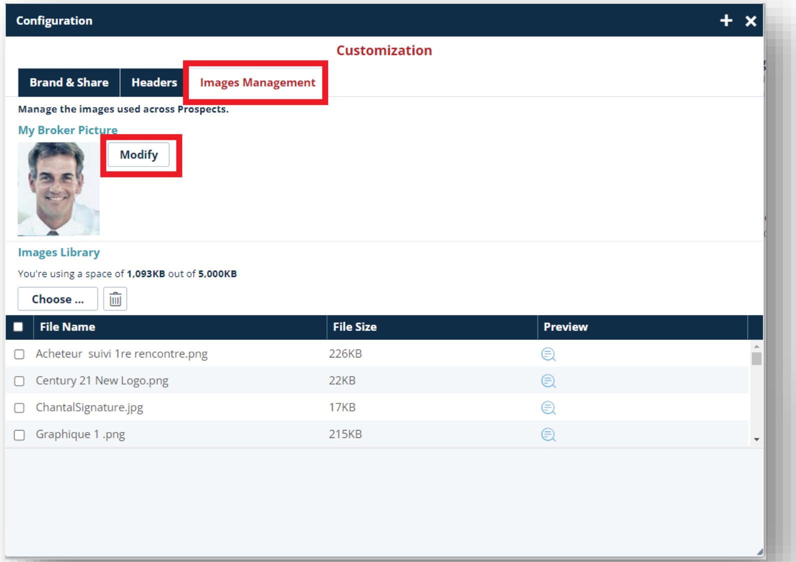
7. The ***Preview*** button lets you see a preview of a listing sheet or market report with your new setup.

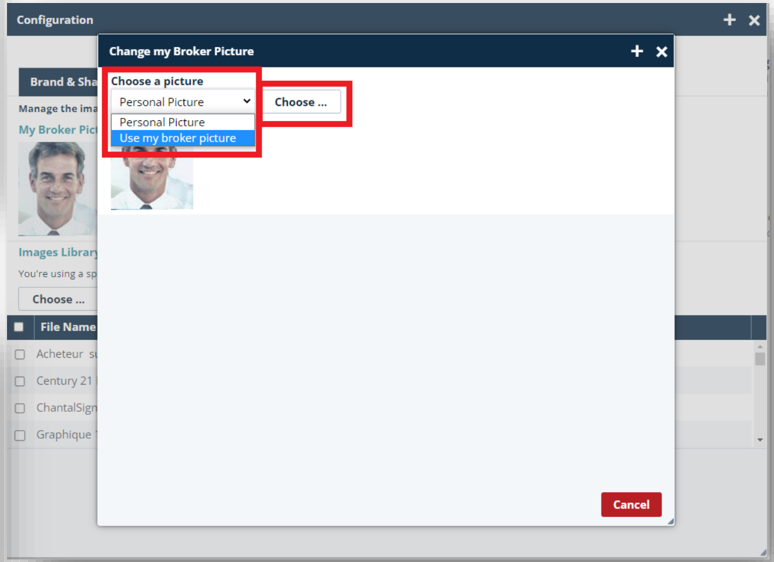


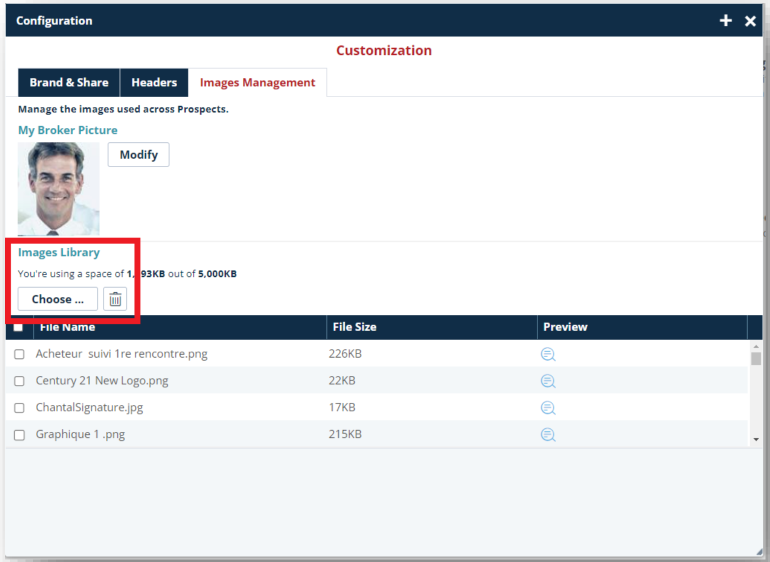
1. Select the ***Headers*** tab.
2. You can configure your headers that will be displayed on documents. To modify an existing header, double-click on the title.
3. Select the first option to use your broker photo from the real estate board.
4. Select the second option to choose another photo. Use the 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.

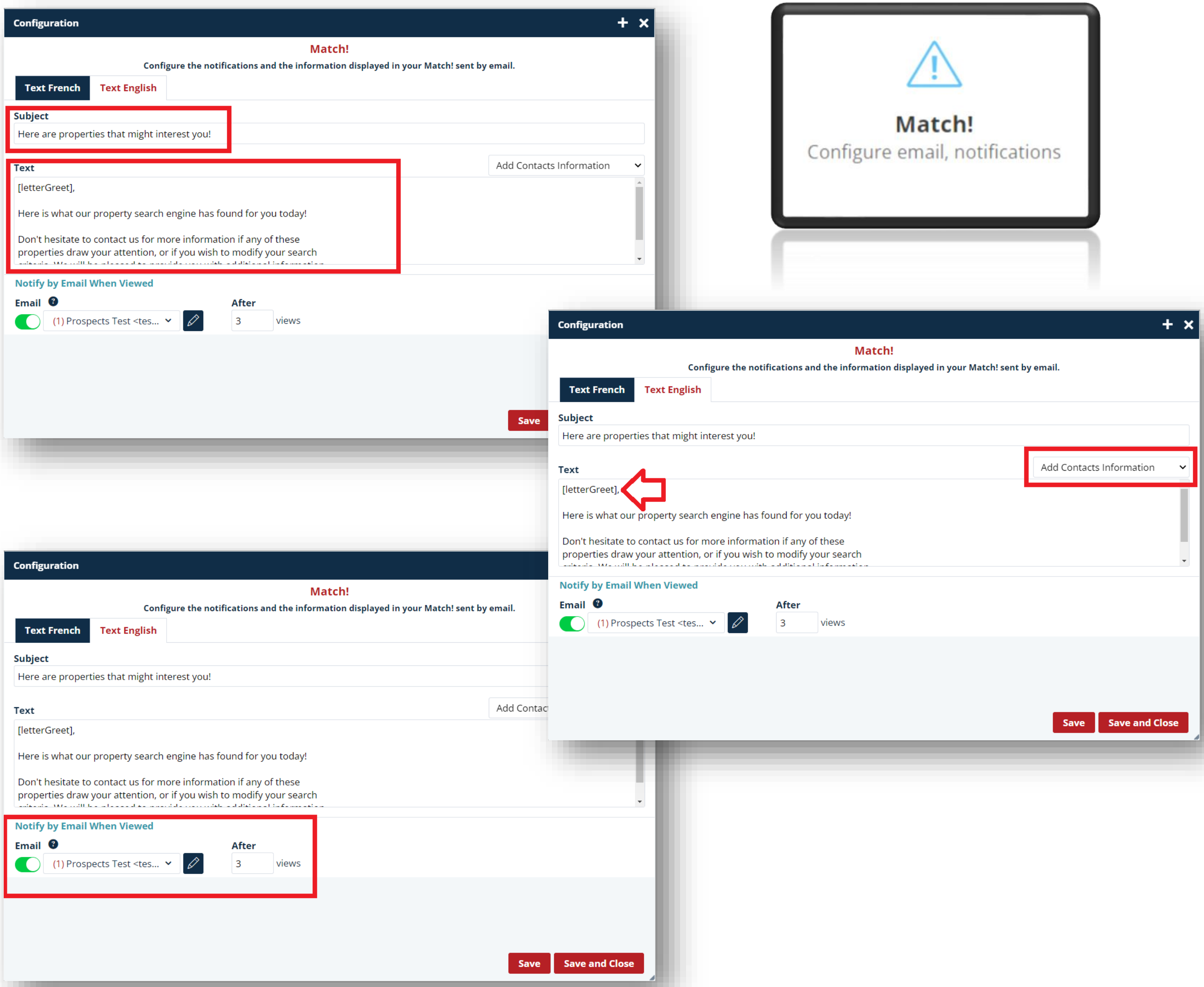






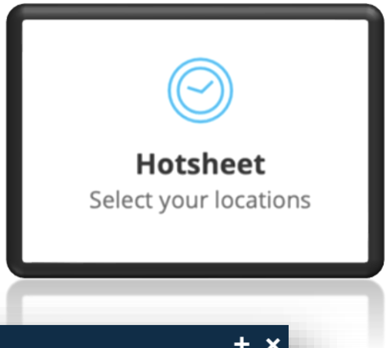
Match!

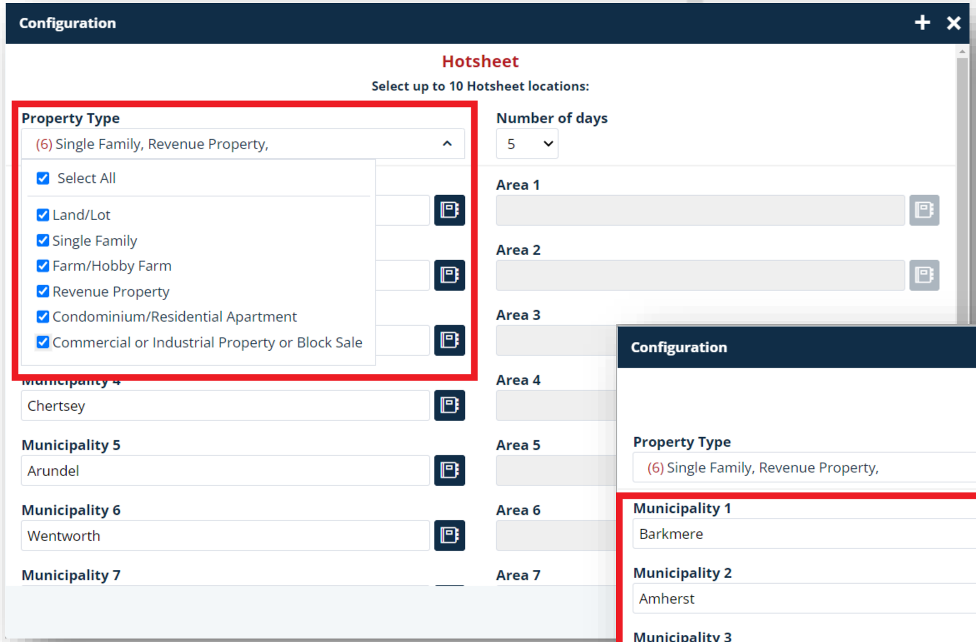
- You can modify the ***Subject*** of the email that will be sent, as well as the ***Text*** content of the email.
- If you wish to include information from your contact file, such as the greeting or the first and last name of your contact, you can do so using the drop-down menu on the right ***Add contact 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.

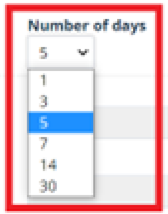


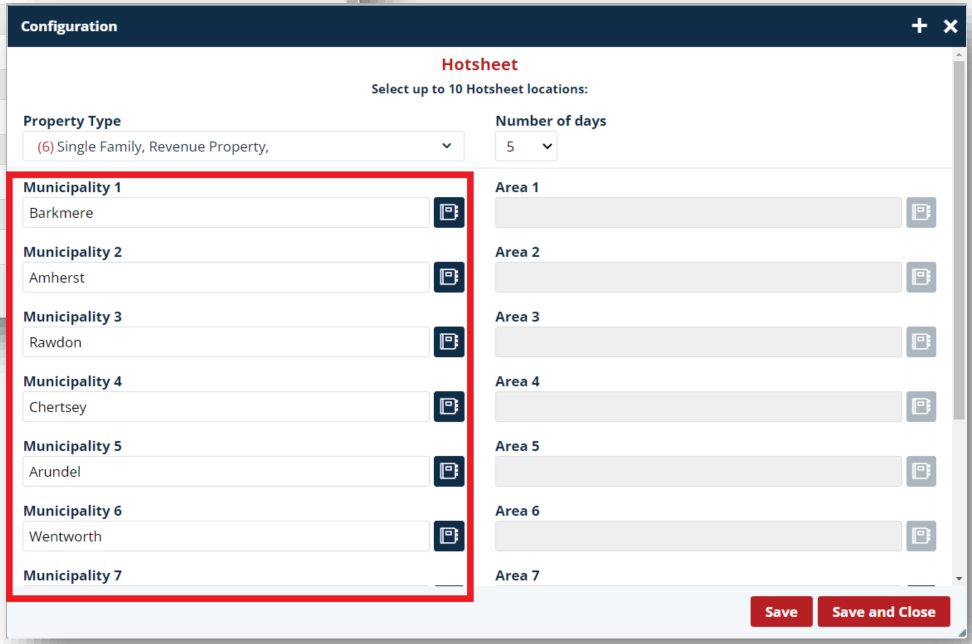
Hotsheet

- 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.



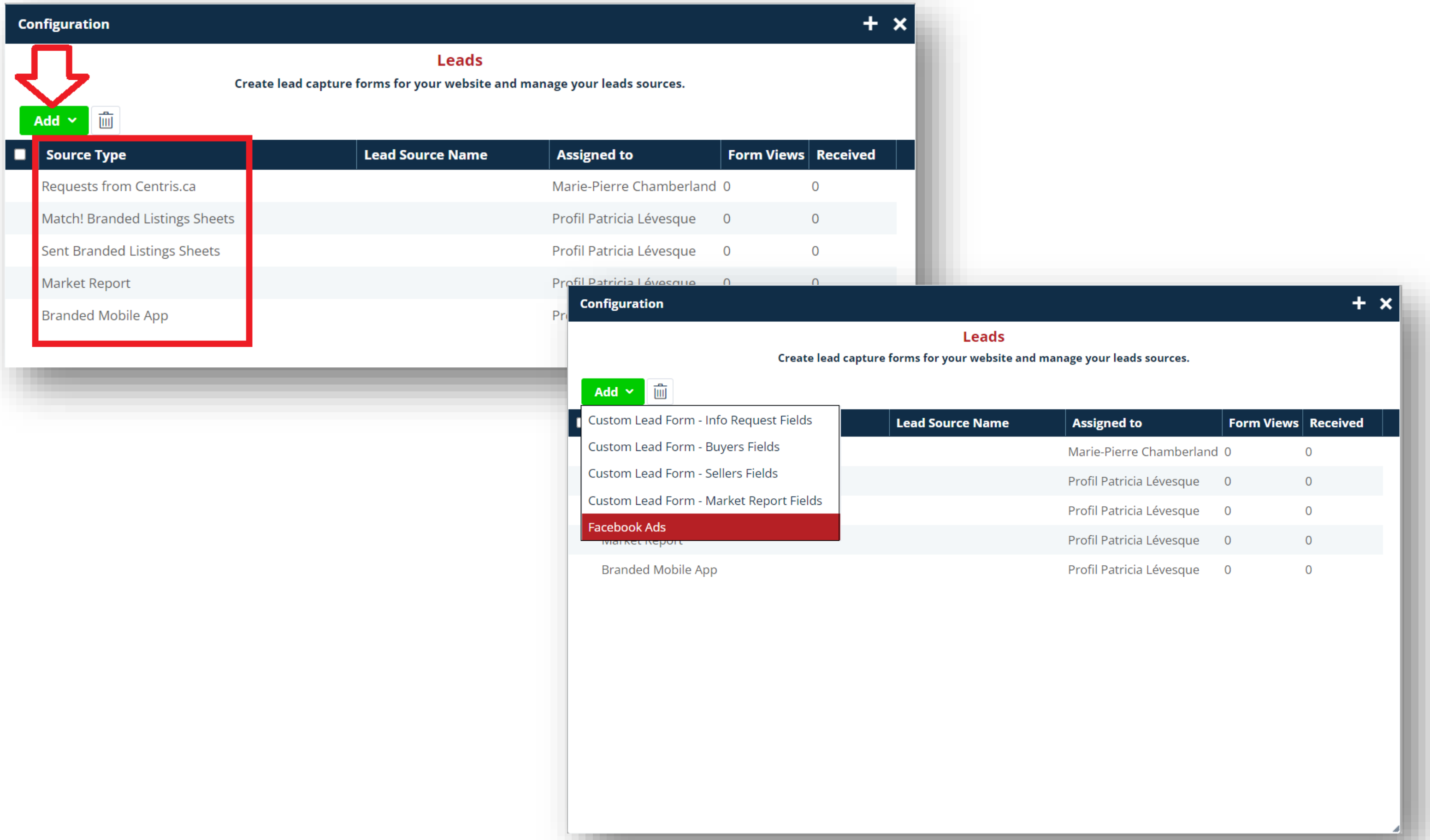






Leads

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

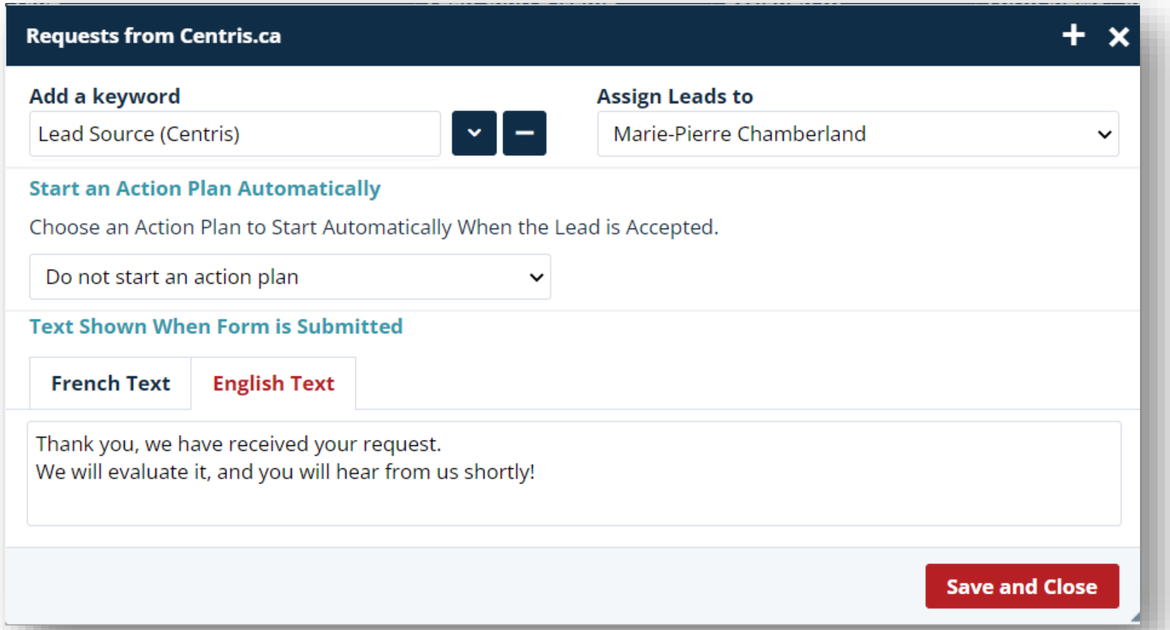


1. It is possible to associate a *Keyword** with the *Source*. This will be automatically added to the contact file once the *Lead* is accepted.

2. You can also associate an *Action Plan** with the *Source*. This will be automatically triggered when the *Lead* is accepted.

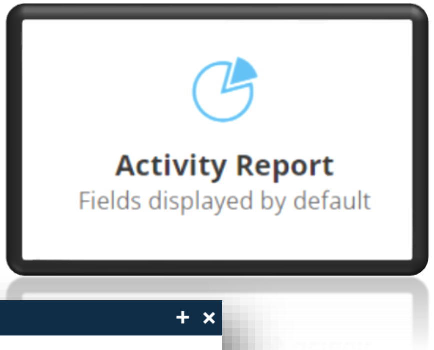
3. It is also possible to assign *Leads* to a colleague in your team. Please note that this configuration must be made in each of the *Sources* and in each of the team members' accounts.

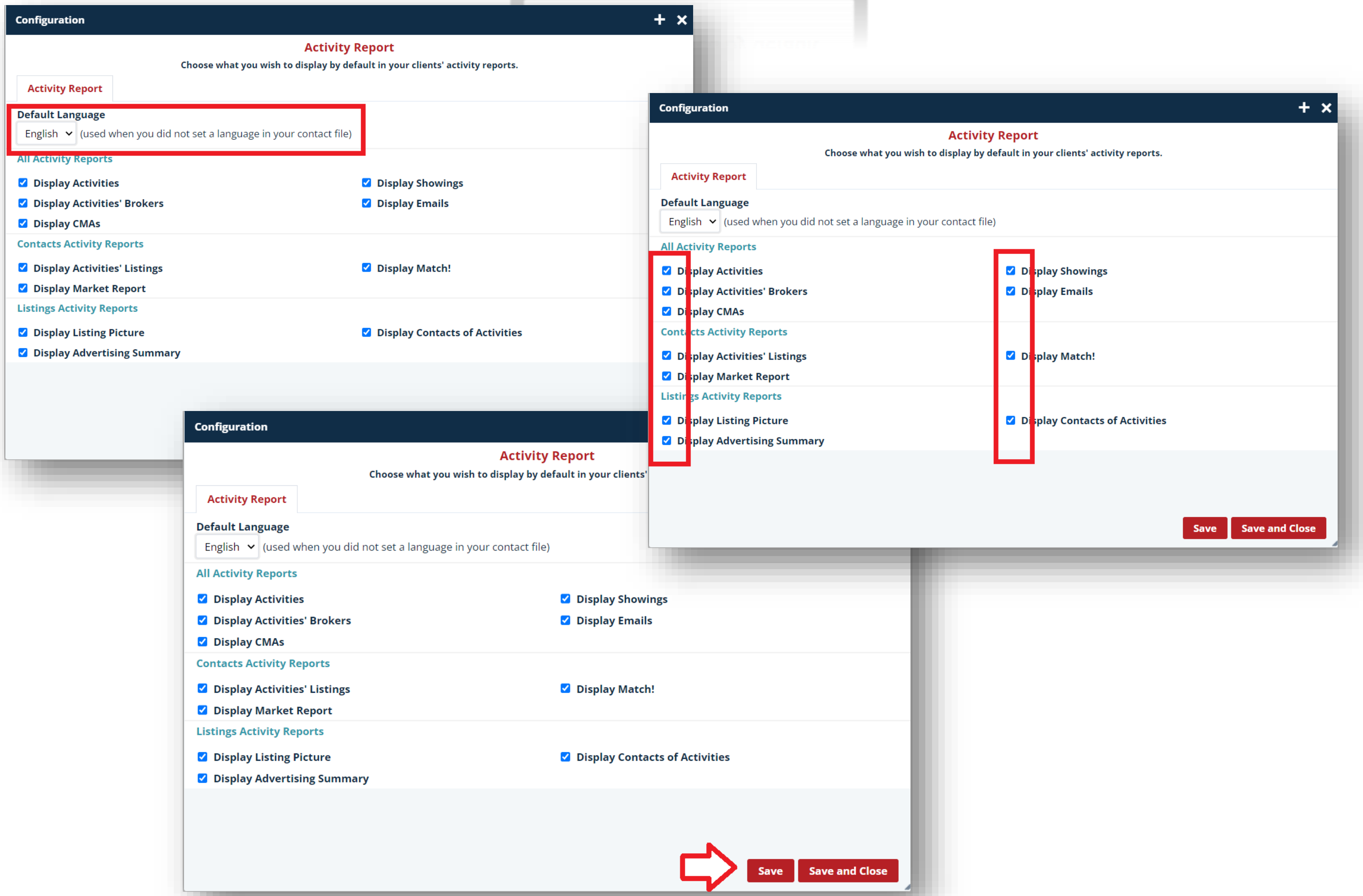
* The *Keyword* and/or *Action Plan* must already exist in order to be associated with a *Source*.



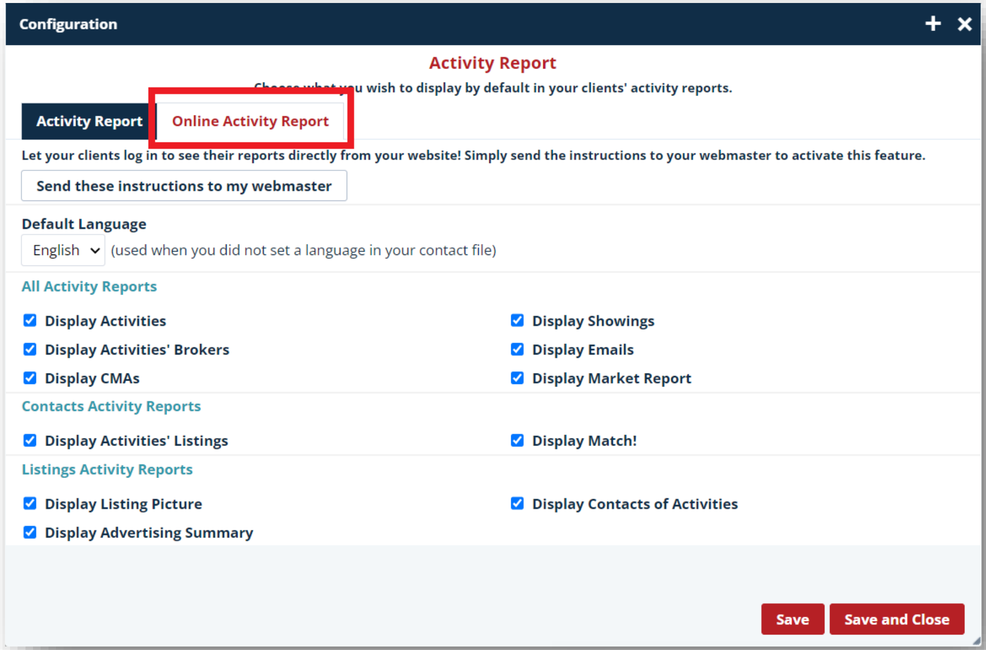
Activity Report

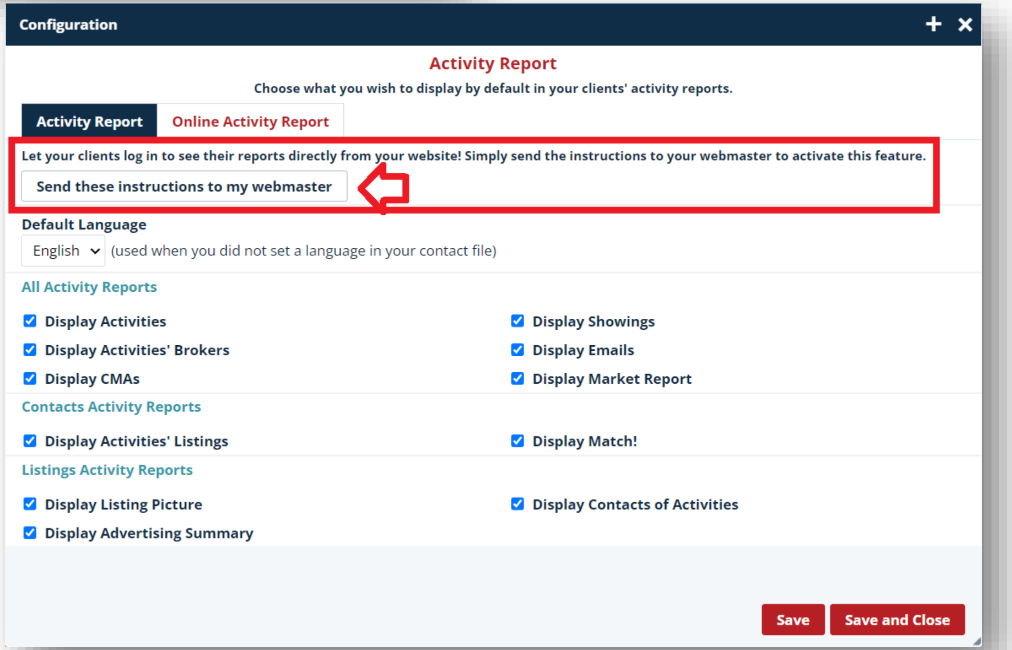
- In the ***Activity Report*** tab, you can select the default language for activity reports. The default language will automatically be applied to contacts who do not have a primary language defined in their contact file.
- Check all the options you want to display on your clients' ***Activity report***.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





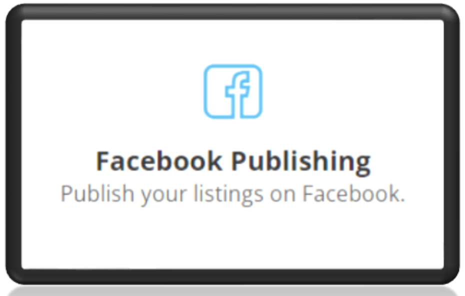
1. If you would like to offer your clients the possibility of viewing their *Activity report* from your website, select the second ***Online Activity Report*** *tab.*
2. Click the ***Send the instructions to my webmaster*** button and follow the on-screen steps to send them the installation guide.
3. 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.

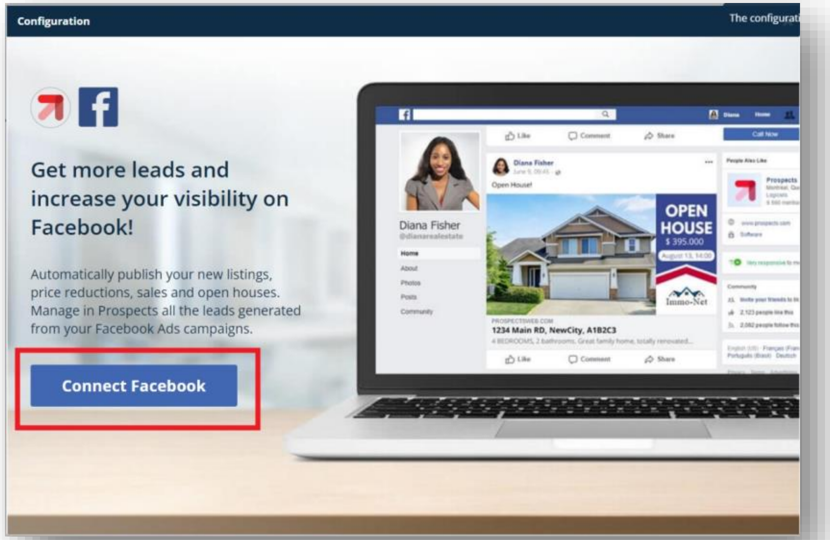


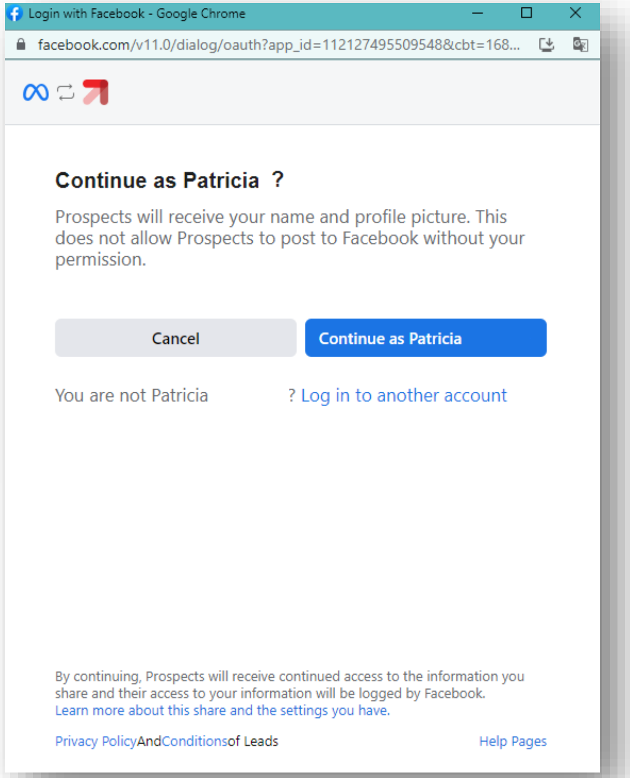


Facebook Publishing

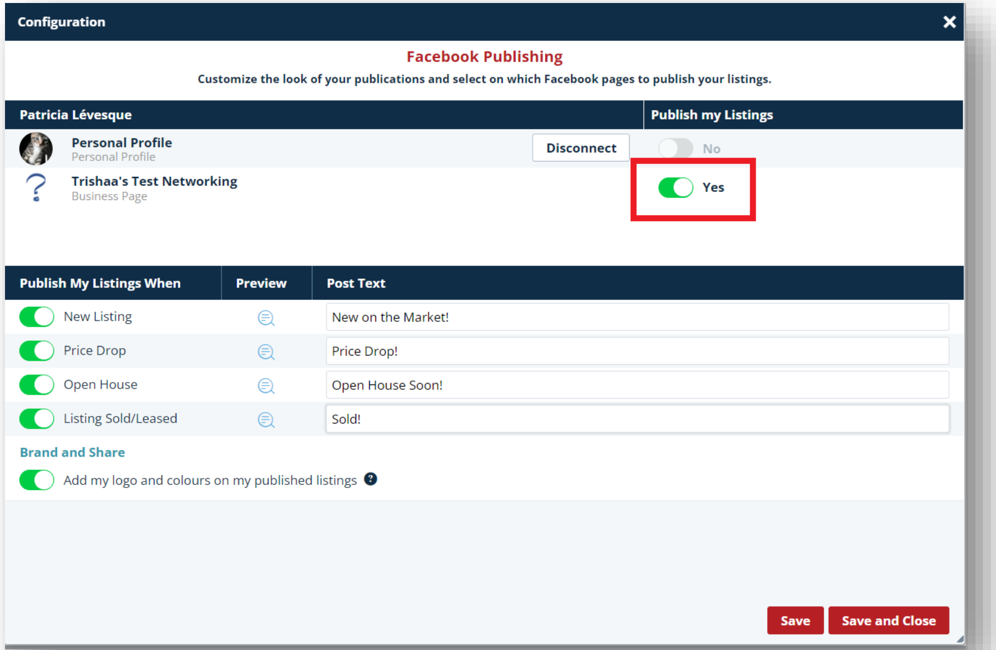
- Click on the ***Connect Facebook*** button and follow the instructions on screen to log onto your ***Facebook*** account.
- Select your profile and business pages.

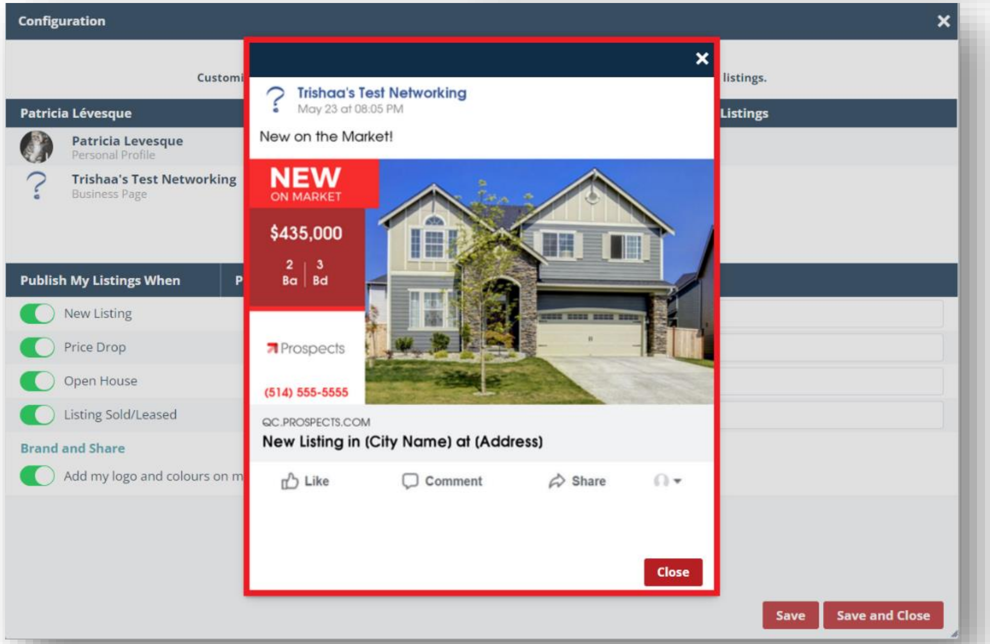






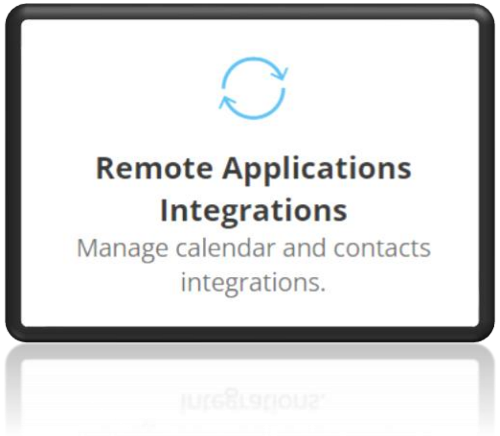
1. Once your account is connected, you will see the following screen. Use the toggle button to select the professional page(s) on which you want to publish your listings. The toggle button should appear in green and display ***Yes*** for activated pages**.**
2. Next, define the status updates of your 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.

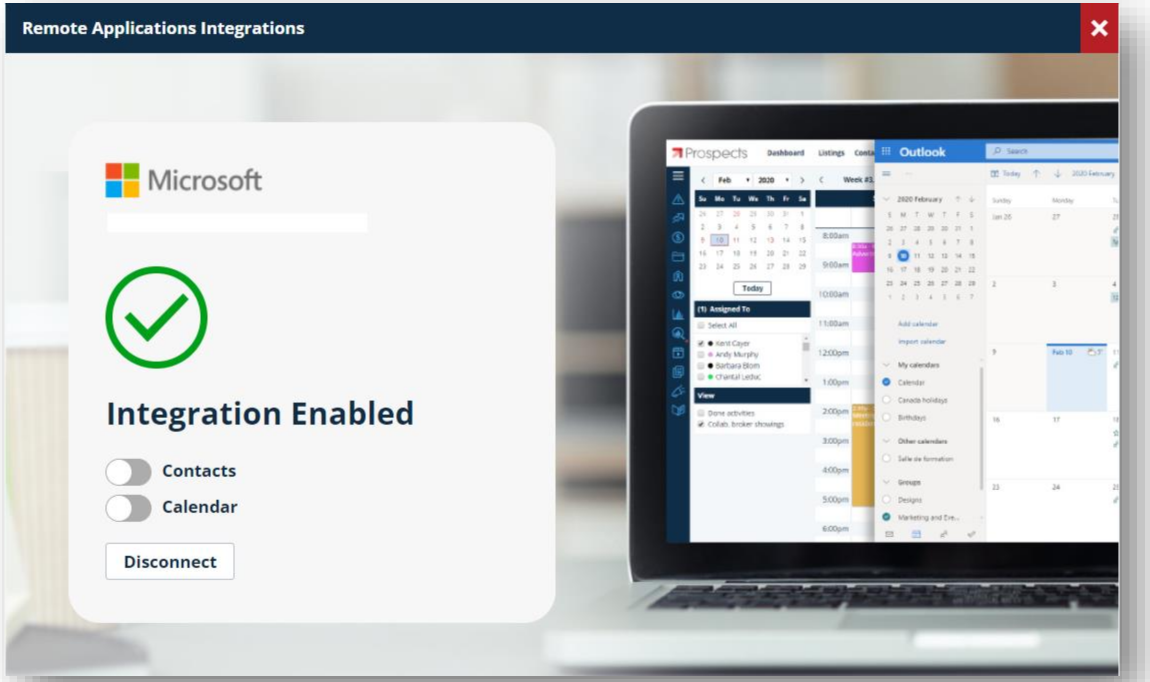




Remote Applications Integrations

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





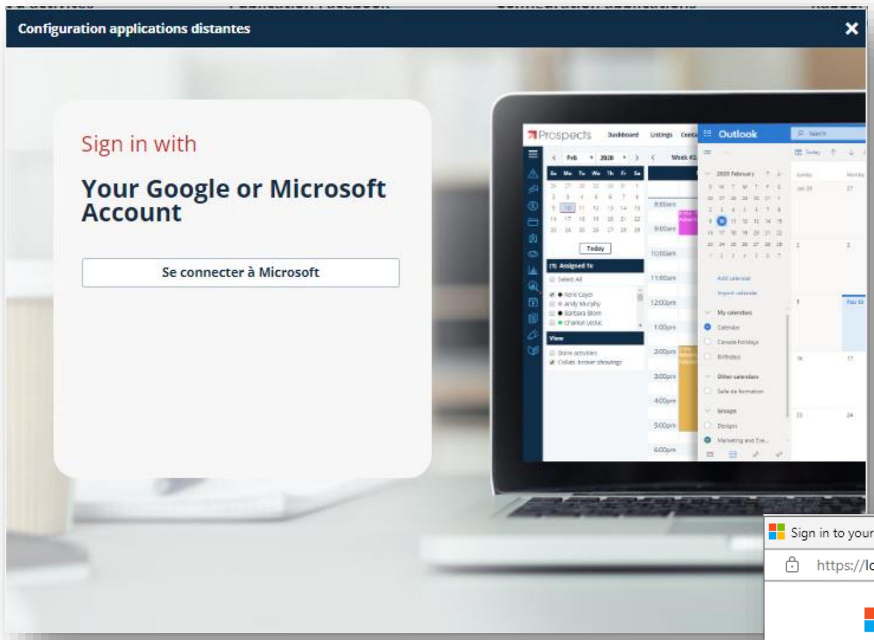
1. Click ***Sign in to Microsoft*** or ***Sign in to Google***.

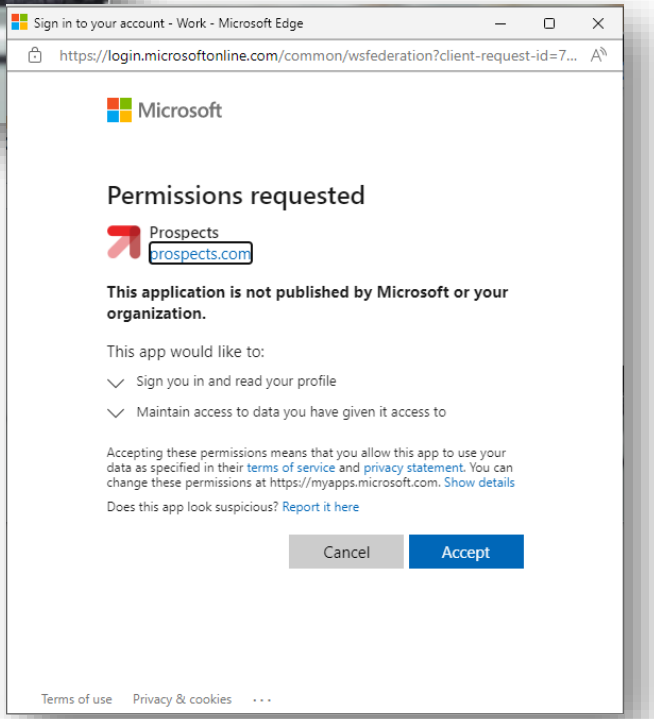
2. In the authorization window, click on ***Accept***.

3. In the *Integration Enabled* window, you can enable contact synch as well as calendar synch.

4. You can close the window.

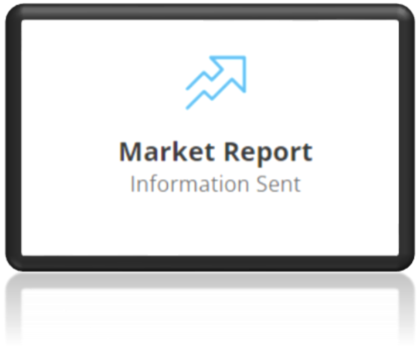
5. Make sure you have set up the chosen account in your mobile device in order to receive the data transfers.

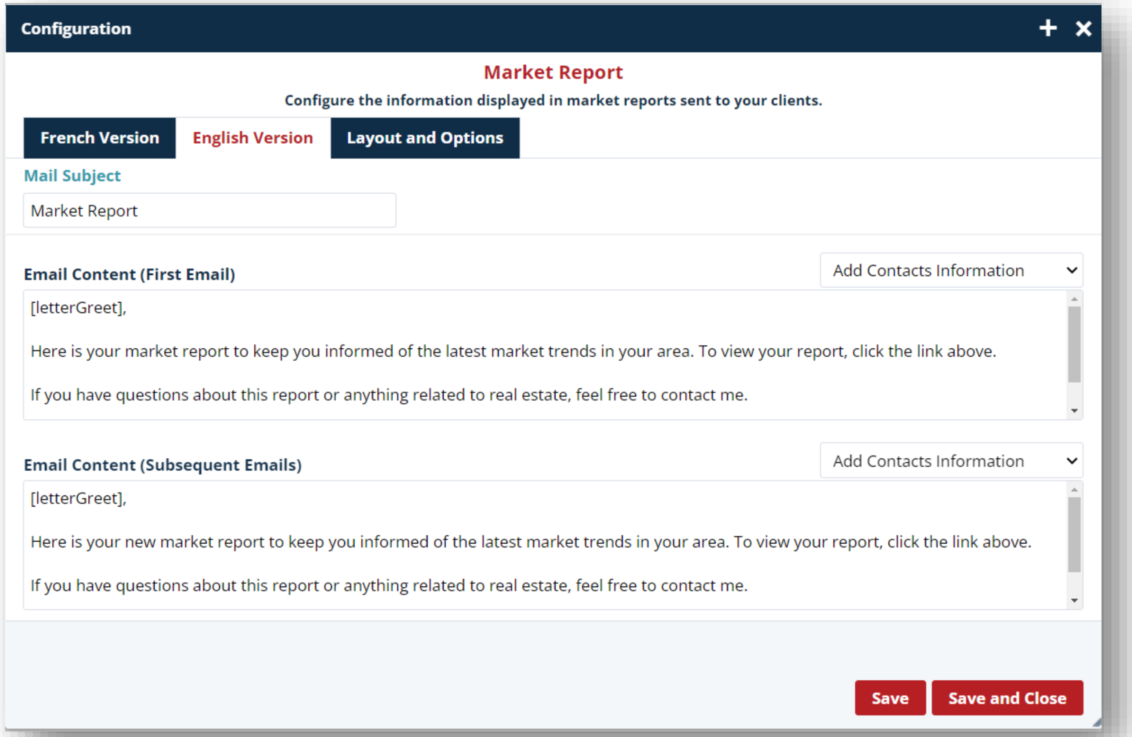




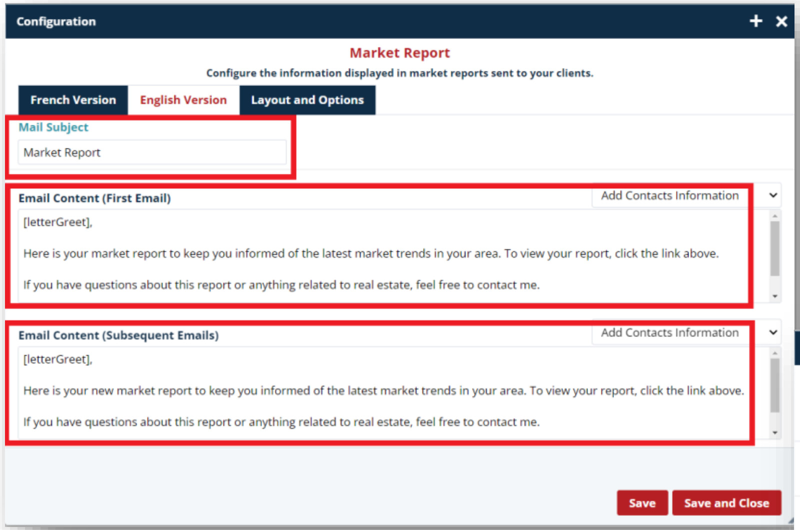
Market Report

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

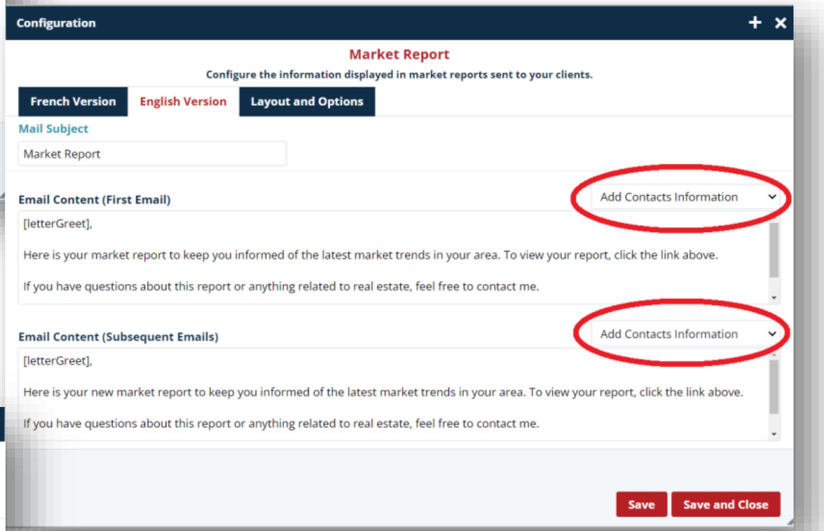




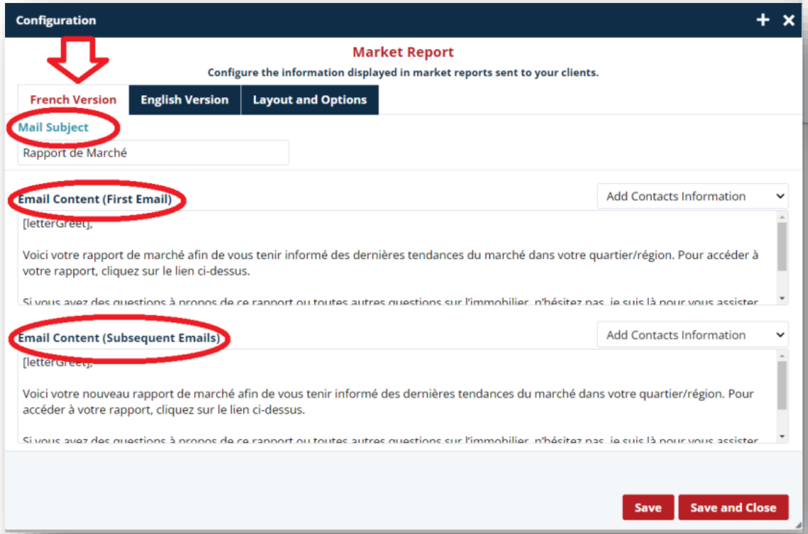
1. On the ***English Version***tab, you can modify the subject of the ***Mail Subject*** that will be sent, as well as the ***Email Content*** of the ***First Email*** and all ***Subsequent Emails***.



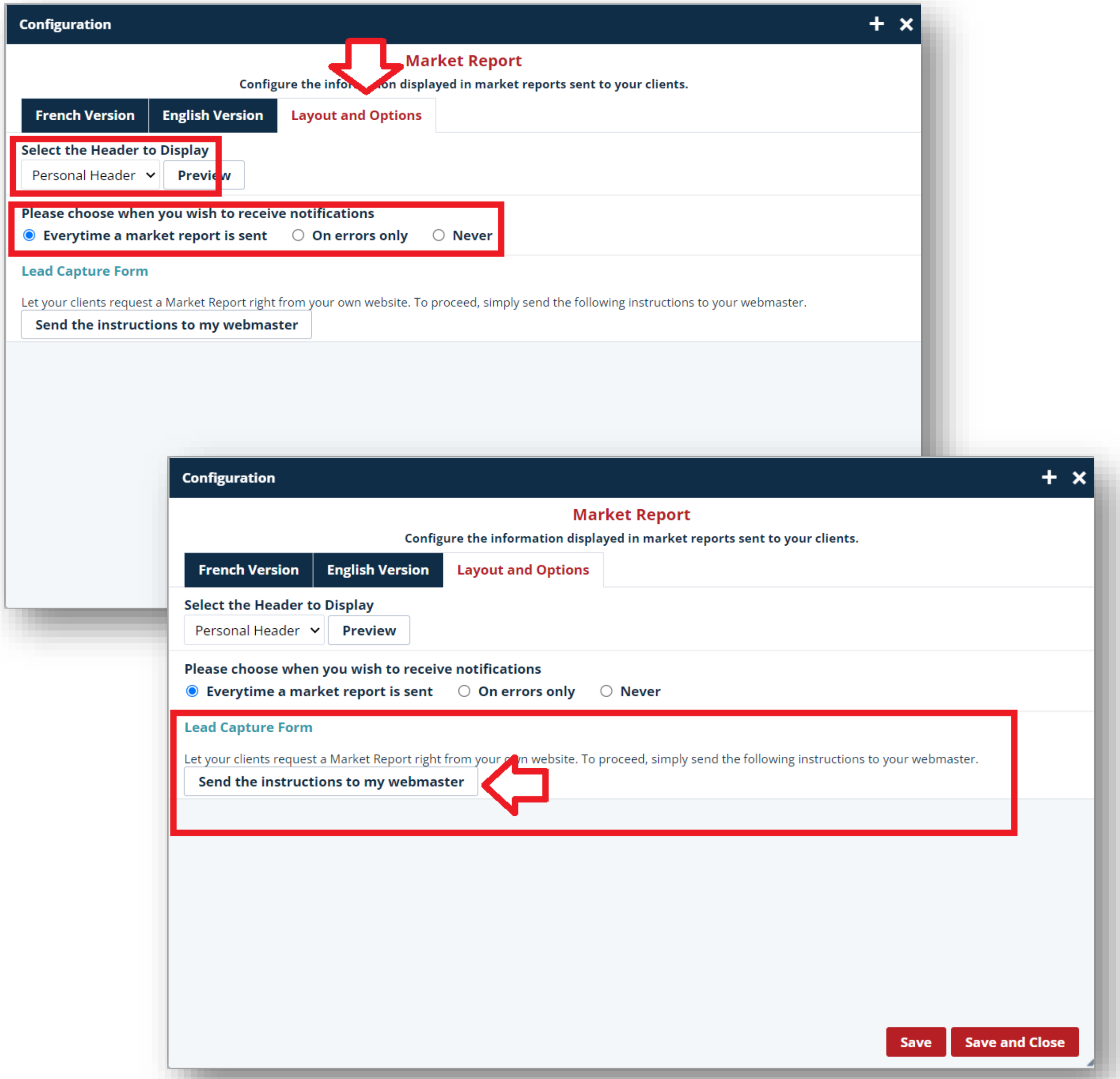
2. If you wish to include information from your contact files, such as the greeting or the first and last name of your contacts, you can do so by placing the cursor at the desired location in the body of the email and then clicking on the drop-down menu on the right ***Add contacts information***.



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.

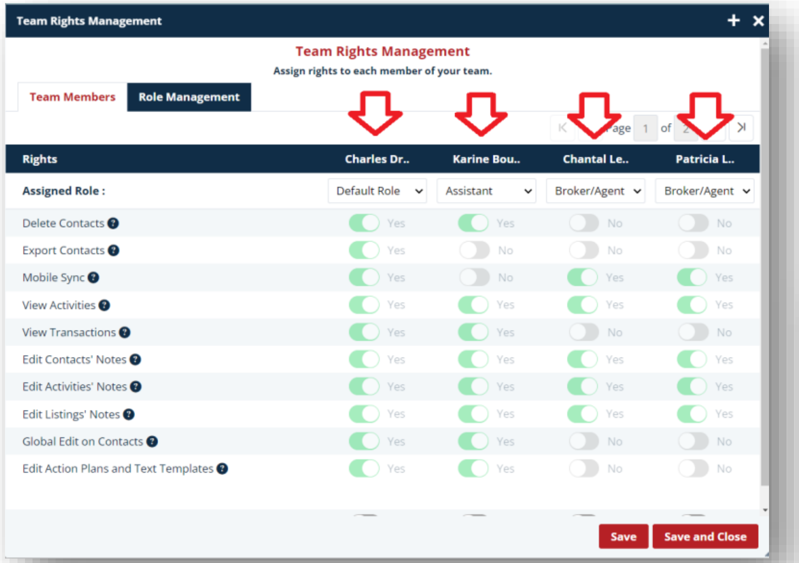


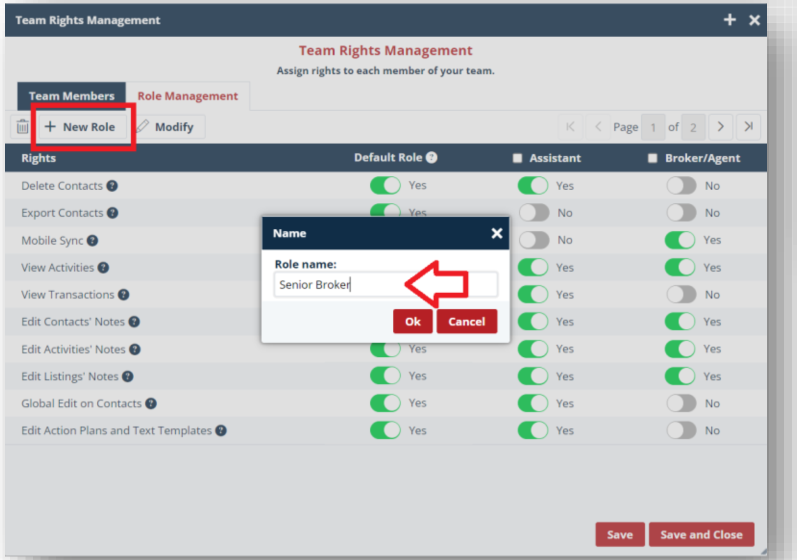
1. Under the third tab, ***Layout and options***, you will have the possibility to select the ***Header to Display*** (see ***Personalization Guide*** for more information).
2. You may also choose in which situation you would like to receive notifications.
3. If you would like to offer your clients the 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.

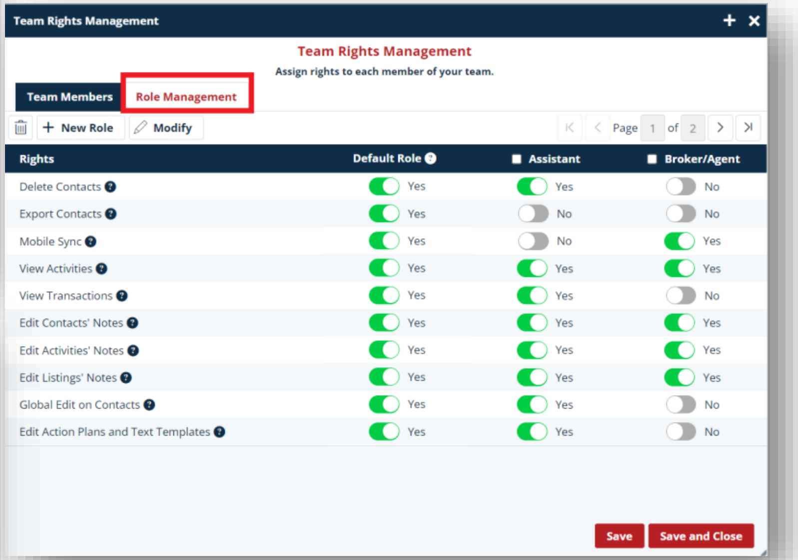


Prospects for Teams

- 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.







- 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.