



 **Prospects**<sup>®</sup>

Start up Guide



Marketing and Contact Management

***Made Easy!***



Introduction.....	3
Minimum Requirements.....	4
How to Log In?.....	5
Configuring your Software.....	6
Importing Contacts.....	6
PDA Synchronization.....	7
Team Ready.....	8
Listings.....	9
Contacts.....	10
Calendar.....	12
Showings.....	14
Available Help.....	15

## Introduction

Welcome to *Prospects*! This guide will help you get started with your new software!

When using a contact manager to stay in touch with your leads, it's important to think about how you will use the system to implement your business plan.

First, be sure you make good use of the contact type and keyword features of *Prospects*. This will help you create marketing messages and follow up plans for specific groups of contacts like past clients, center of influence, buyers, sellers, etc...

Make a plan for each group you create.

4 questions will help you create a plan to connect with your contacts like never before.

1. What group are you marketing to? Use contact type and keywords to separate your groups and follow up plans.
2. What do you want to say to them? Make sure your follow-up strategy answers the questions that group would have.
3. How do you want to say it to them? Email, phone call, letter, Facebook... Choose a method that would work best for each lead.
4. How often (or how long) will you stay in touch with them? Every month? Every week? Pick a time frame that is appropriate for each lead.

Remember, you need to stay in touch with your contacts for a period of time before you start to see results. Not everyone needs a real estate agent's help today. In general, contacting someone a minimum of 8 times is required to see tangible results.

### ***The secret to success in the real estate business is to do the following every day!***

1. Add at least 2 to 3 contacts a day to your database;
2. Systematically request referrals to your clients, friends, family members as well as any individual within your sphere of influence;
3. Use *Prospects* as your main tool;
4. Synchronize your *Prospects* software with your PDA (*iPhone*®, *Blackberry*®, *Android*®, *Palm*®, etc.)

## Minimum Requirements

For a trouble-free experience, please ensure that the computer you are using meets the minimum requirements and that it is correctly configured.

The minimum requirements to run *Prospects* are listed below:

Operating System	.....:	<b>Windows XP®</b> , <b>Windows Vista®</b> or <b>Windows 7®</b>
Browser	.....:	<b>Internet Explorer® 8.0</b>
Internet	.....:	<b>High-Speed Internet</b>
Screen Resolution	.....:	<b>1024 X 768 pixels</b>
Additional Software	.....:	<b>Adobe Acrobat Reader®</b>

Please note that *Prospects* uses advanced *Internet Explorer®* functions and works exclusively with that browser. We are currently working on a new version that will work in other browsers like *Safari* and *Firefox*.

Also, some windows may be blocked by popup blocker software. Make sure to allow the website [www.prospectsweb.com](http://www.prospectsweb.com) to use popup windows.

## How to Log In?

You can access your new software through your Real Estate Board's Intranet.

### For *Centris* Users

*Prospects* will be available as a *Centris* product. You can also login *Prospects* directly from *Matrix*.

### For *CREB* Users

You can log into *Prospects* directly from *MLXChange*.

**OR**

You can log into your new software through the *Prospects* official website at [www.prospects.com](http://www.prospects.com), and click on the **Login** button.

**Then...**

### For *Centris* Users

Enter in the appropriate fields your *Username* and *Password*, as they were provided to you when you subscribed to *Prospects*.

**OR**

Click on the *Centris* logo, and enter the *Username* and *Password* that were provided by *Centris*.

### For *CREB* Users

Enter in the appropriate fields the information you are using for *MLXchange*, i.e. your *User ID*, your *Password* (which is your authenticator token) and your *PIN*.

**Please note that you will have to select your *Country* and your *Real Estate Board* the first time you access our login page.**

## Configuring your Software

Your software has been configured to meet the needs of most *Realtor*®. However, some options can be customized to better suit your personal taste.

Please take the time to review your software's configuration to better serve you and make for a more productive program.

To access the configuration options, you must click on the **Configuration** menu located in the upper-left corner of the interface.

## Importing Contacts

You can import your contacts from other software, like *Outlook 2000-2010*, *Outlook Express 6*, *Top Producer 6i to 8i* or any other software that allows you to export your contacts in a **CSV** or **vCard** file format.

Start by exporting your contacts from your previous contact manager software. When your contacts are exported, import them in *Prospects* by choosing **Contacts Import** under the **Utilities** menu.

**Our support team will be glad to give you a hand if you need any assistance.**

## PDA Synchronization

You can synchronize your personal digital assistant (PDA) with *Prospects*.

This great feature will save you time as you won't have to retype contacts and appointments in your phone or *Prospects*.

The software ***CompanionLink for Prospects*** is used for ***Blackberry***® devices.

*Prospects* proprietary ***Push Synchronization*** service (\*) is compatible with all devices that supports the transfer of contacts and activities through ***Microsoft Exchange***® like ***Android***®, ***Windows Mobile***®, ***iPhone***®, ***iPad***®, and some ***Palm***® devices.

(\*)*This synchronization requires that you have a **data plan** with your carrier.*



**A minimal fee of \$49 per year (+ tx) is required to activate and maintain this service.**

Please contact Prospects technical support to learn more about this service.

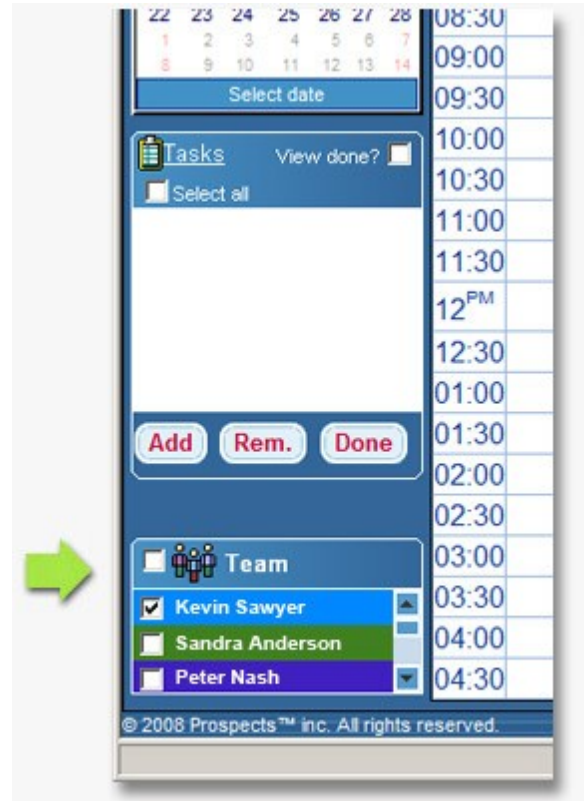
## Team Ready

**Working as a team in Prospects is effortless!**

You can share databases with your *Prospects* teammates.

This gives you and your teammates the ability to share contacts, activities, listings and view each other's calendars in order to work more efficiently and avoid scheduling conflicts.

In addition, you will be able to assign an activity to any team member and vice-versa. You will also be able to view the calendar of other team members by simply selecting their names from the **Team** box.

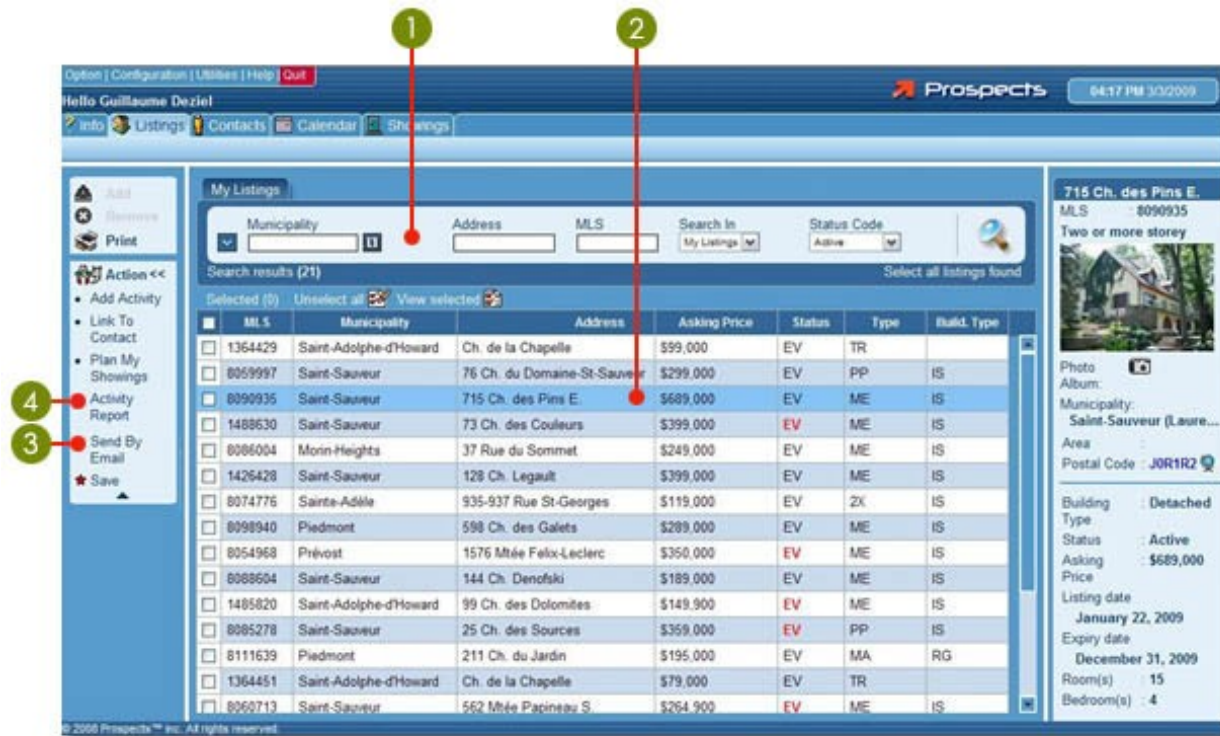


**If you wish to set-up your team, simply contact *Prospects'* technical support.**

## Listings

The *Prospects Listings* tab gives you access to your MLS® listing database. You can easily manage all the listings you are working on through this section.

You can also perform searches and print or email listings through this tab. Every listing file includes folders with information such as past and future activities and linked contacts.



### 1. Search for a Listing

You can search for a listing by **Address** or **MLS** number with the help of the search box.

### 2. View a listing

You can display a preview of the listing with a single click or view the full listing file by double-clicking directly on the listing file.

### 3. Send a Listing by E-mail

You can send selected listings by email by clicking on the **Send By Email** button.

### 4. Print or Email an Activity Report

You can print or email an activity report for the selected listings by clicking on the **Activity Report** button.

## Contacts

The **Contacts** tab allows you to search, add, remove, edit and manage your contacts.

The contact file lets you enter all the information you need about your clients.

In addition to recording the standard contact information, you can save the name of your client's spouse, their birthday, the name of the person who referred you to the client, and keywords that will make it easier to organize your contacts so you can quickly find them again.

The screenshot shows the Prospects software interface with the following components and callouts:

- 1:** Action menu containing Add, Remove, and Print.
- 2:** Search filters: Search By Name (shatilla), Search By Keywords, and Search By Type.
- 3:** Search results table with columns: Last Name, Contact Type, Office, Home, Address, and City.
- 4:** Contact details for Erik Shatilla, including Contact Type (Agent), Office, Home, Cellular, Fax, E-mail, Spouse, Address, Keywords, and Notes.
- 5:** Action menu containing Add Activity, Labels/Env., and Link To Listing.
- 6:** Global Edit menu containing Merge and Export.

Selected	Last Name	Contact Type	Office	Home	Address	City
<input type="checkbox"/>	Shatilla, Erik	Agent	(514) 694-6900		101 AMHERST	BEACONSFIELD
<input type="checkbox"/>	Lévesque, Patricia		(514)765-9555		1 Place Du Commerce	Ile-des-Soeurs
<input type="checkbox"/>	Déziel, Guillaume		514-765-9555		220 - 1 Place Du Commerce	Montréal
<input type="checkbox"/>	Leduc, Marie		514-765-9555		1 Place Du Commerce	Ile-des-Soeurs
<input type="checkbox"/>	Drouin, Charles		(514)765-9555x228			Montreal
<input type="checkbox"/>	Pilon, Marc-André	Agent	(450) 227-8411		286 PRINCIPALE	ST-SAUVEUR

**1. Add a Contact**

The **Add** button allows you to add a contact to your database.

**2. Search for a Contact**

You can search for a contact by **Name**, **Keyword** or **Type** with the help of the search box.

**3. Access the Advanced Search**

The square-shaped button allows you to switch to the **Advanced Search**.

**4. View a Contact**

You can display a preview of the contact information with a single click or view the full contact file by double-clicking directly on the contact.

**5. Print Labels or Envelopes**

The **Labels/Env.** button allows you to print labels or envelopes for the selected contacts.

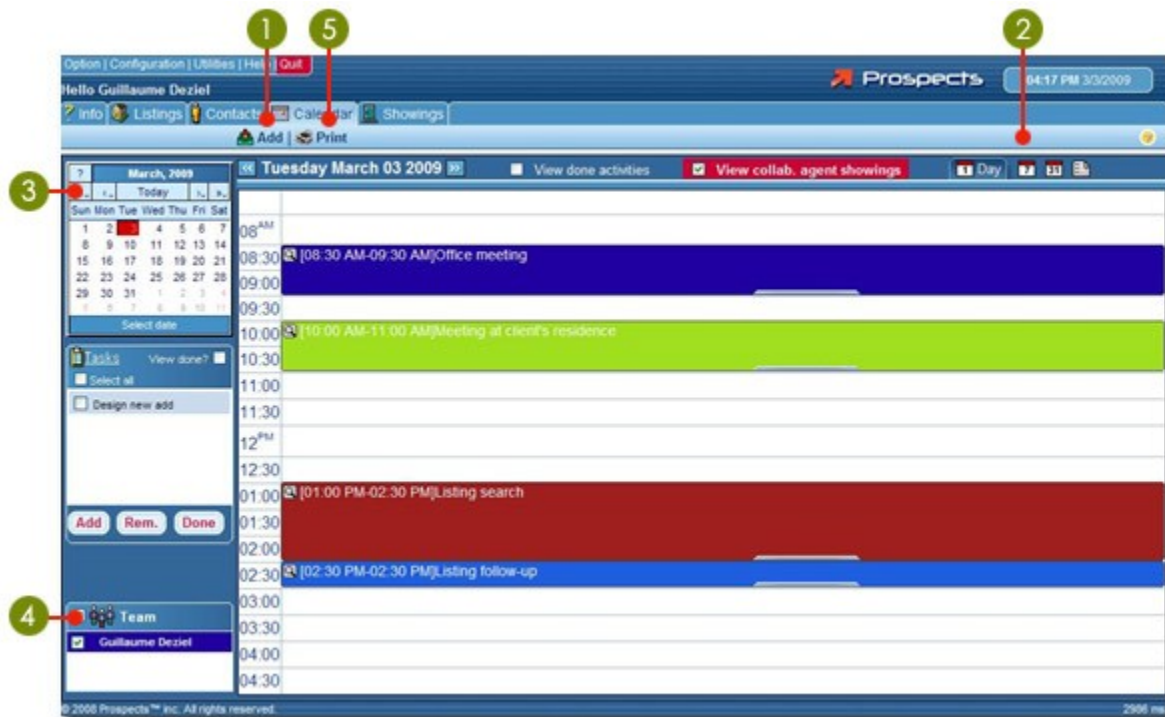
**6. Modify Selected Contacts**

The **Global Edit** function allows you to modify several contacts at a time.

## Calendar

The *Prospects Calendar* is linked to your MLS®. It is simple and intuitive and allows you to easily manage your schedule and carry out most of your daily tasks.

Never again will you have to type information on a property or a collaborating agent; one click of the mouse and it is done! In addition, every past or future activity is automatically saved into your contacts and listings files, ensuring a flawless follow-up.



1. **Add an Activity**

The **Add** button allows you to schedule activities in your calendar.

2. **Calendar Tabs: Day, Week, Month and Year**

The different tabs allow you to switch between the daily, weekly, monthly and yearly views of your calendar.

3. **Navigate Through Your Calendar**

The miniature calendar, on the upper left corner of your screen, allows you to navigate through your calendar grid.

4. **Work As a Team**

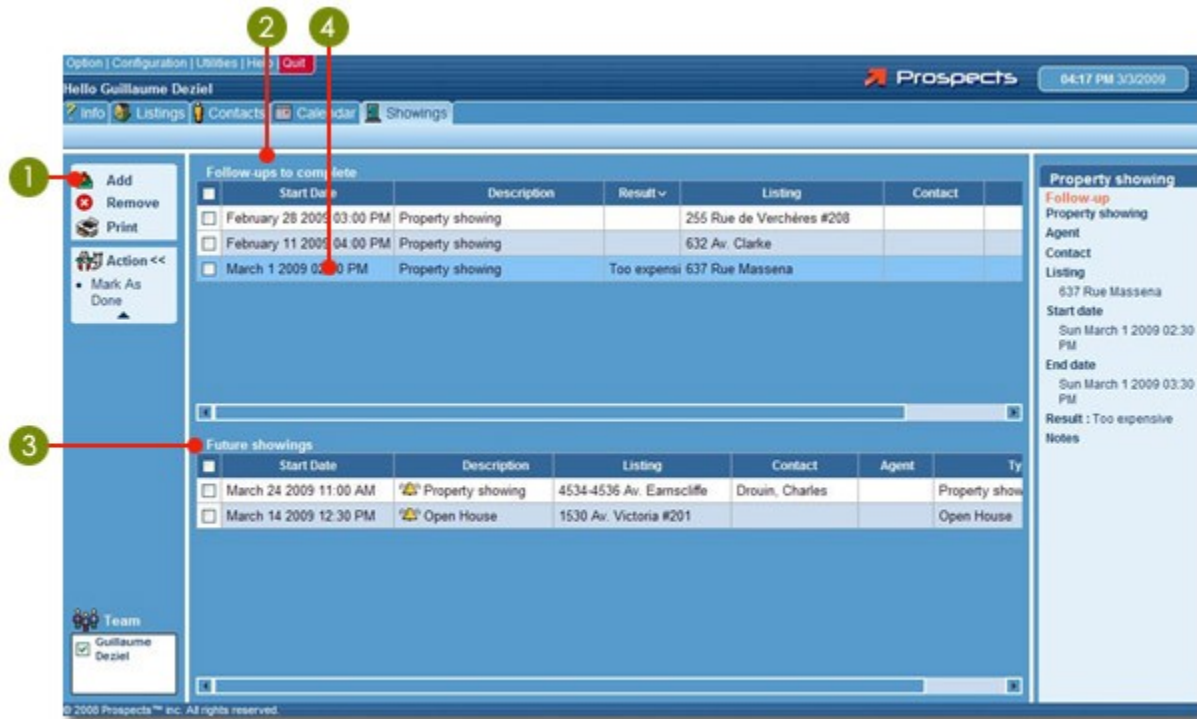
You can view/manage your team's schedule with the **Team** box.

5. **Print Your Schedule**

The **Print** button allows you to print the content of your calendar.

## Showings

The *Showings* tab helps you schedule showings and perform follow-ups with efficiency and ease.



### 1. Schedule a Showing

The **Add** button allows you to schedule a new showing in your calendar.

### 2. Follow-up on Completed Showings

All your completed showings will be listed here. You can note feedback on each showing and save it in the history folder of the linked listing and contact files.

### 3. Manage Future Showings

You will find all your scheduled future showings in a list to manage them more efficiently.

### 4. View a Showing

You can display a preview of the showing's information with a single click or view the full showing file by double-clicking directly on the file.

## Available Help

### ***In Your Software:***

The *Prospects* user guide is available under the **Help** menu of your software's interface.

**OR**

Use the help icons located throughout your software. They open the *Prospects* manual to the chapter pertaining to the section you are in or the function you are attempting to use.

### ***Online:***

You can find the list of *Frequently Asked Questions* (FAQs) on the *Prospects* official website at [www.prospects.com/english/support](http://www.prospects.com/english/support).

Free online training sessions are available at the following address  
<http://www.prospects.com/english/training>.

### ***By email:***

You can send all your questions, comments and suggestions at this address:  
[support@prospects.com](mailto:support@prospects.com).

### ***By Phone:***

You can talk to one of our support team specialists from Monday through Friday, 9am to 5pm (your time zone) at the following numbers:

**Greater Montreal Area:** ..... 514-765-9555  
**Toll Free Number:** ..... 1-888-765-9221