



 **Prospects[®]**

Start up Guide



Marketing and Contact Management

Made Easy!



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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.

The following 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 message do you want to communicate to them? Make sure your follow-up strategy answers the questions that group might have.
3. 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.
4. What method do you want to use to communicate with a particular group? Email, phone call, letter, Facebook... Choose a method that would work best 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:	Windows 7®, Windows 8®, or OSX
Browser:	Internet Explorer®, Firefox®, Google Chrome®, or Safari®
Internet:	High-Speed Internet
Screen Resolution:	1024 X 768 pixels
Additional Software:	Adobe Acrobat Reader®

Some windows may be blocked by a popup blocker software. Make sure to allow the website 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, 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 real estate agents. 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** button located on the left-side menu of the interface.

Importing Contacts

You can import your contacts from other softwares, like *Outlook®*, *Outlook Express®*, *Top Producer®* 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 **Import** in the menu located under the **Contacts** section.

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*.



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.

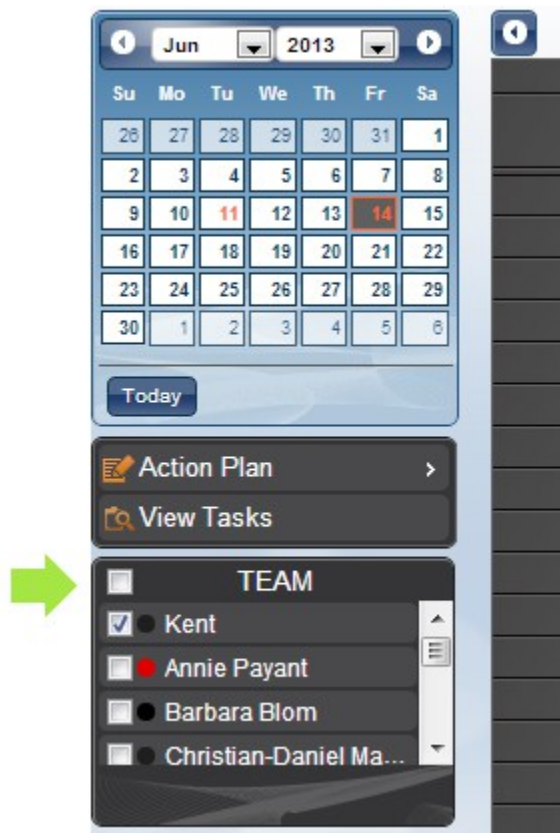
()This synchronization requires that you have a **data plan** with your carrier.*

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 your database 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.

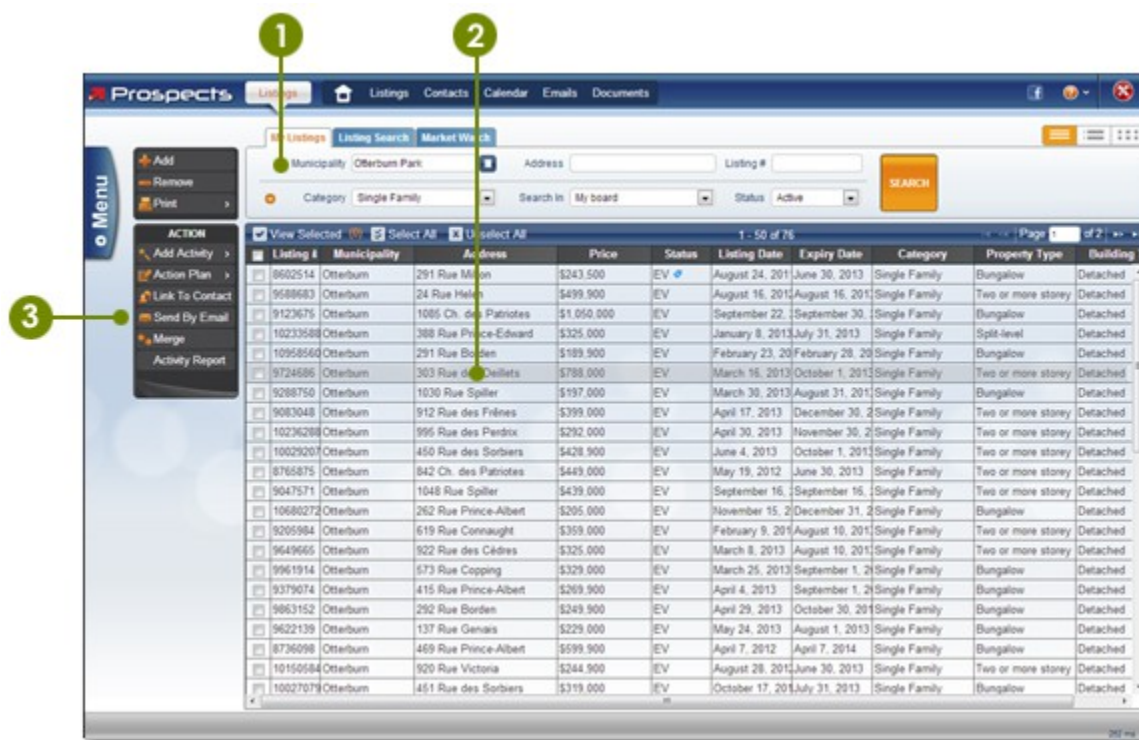
In addition, you will be able to assign an activity to any team member and vice-versa. You will also be able to view the calendar of other team members by simply selecting their names from the *Team* box.

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

Listings

The *Prospects Listings* section gives you access to your MLS® listing database. You can manage all your listings in this section.

You can print, email or search listings in this tab. Every listing file includes folders with information such as past and future activities and linked contacts.



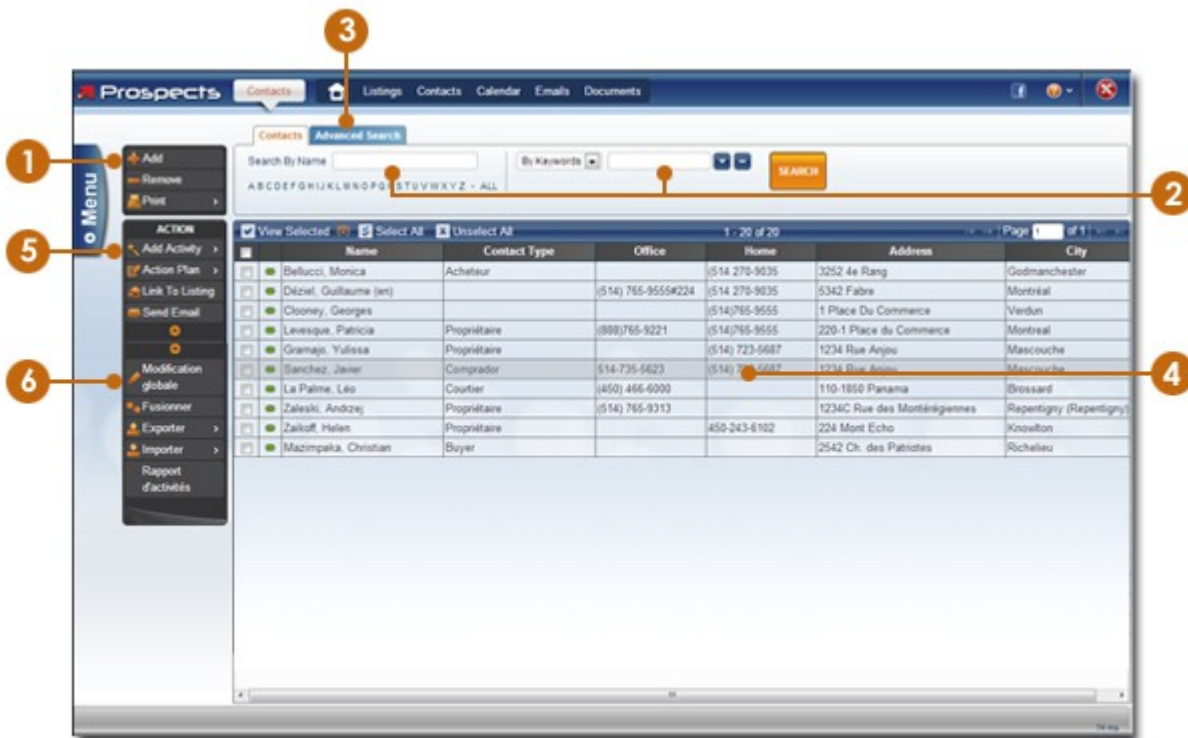
- 1. Search for a Listing**
You can search for a listing by **Address** or **MLS** number with the help of the search box.
- 2. View a listing**
You can display a preview of the listing with a single click or view the full listing file by double-clicking directly on it.
- 3. Send a Listing by Email**
You can send selected listings by email by clicking on the **Send By Email** button.

Contacts

The Contacts section 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 saving the standard contact information, you can enter the name of your client's spouse, their birthday, the name of the person who referred them to you, and keywords that will make it easy to organize your contacts so you can quickly find them again.



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

Take advantage of the **Advanced Search** by clicking on its tab.

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 it.

5. Print Labels or Envelopes

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

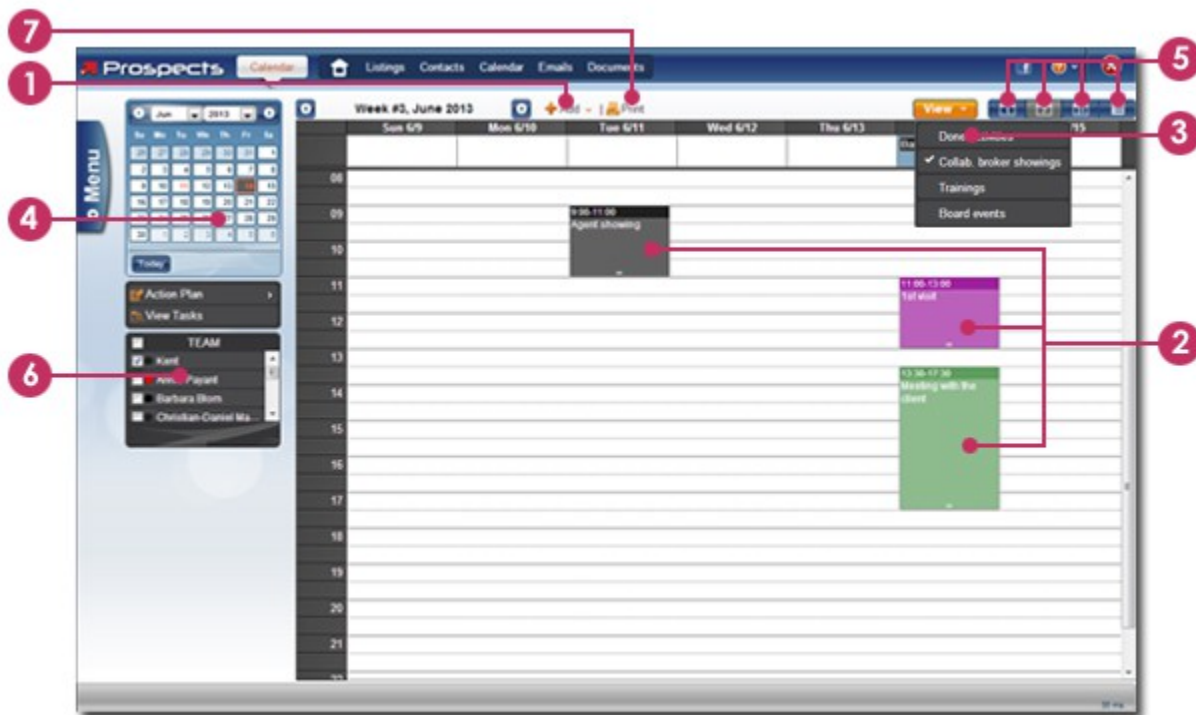
6. Modify Selected Contacts

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 buttons: Day, Week, Month, and List**

The different buttons allow you to switch between the daily, weekly, monthly and list 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**

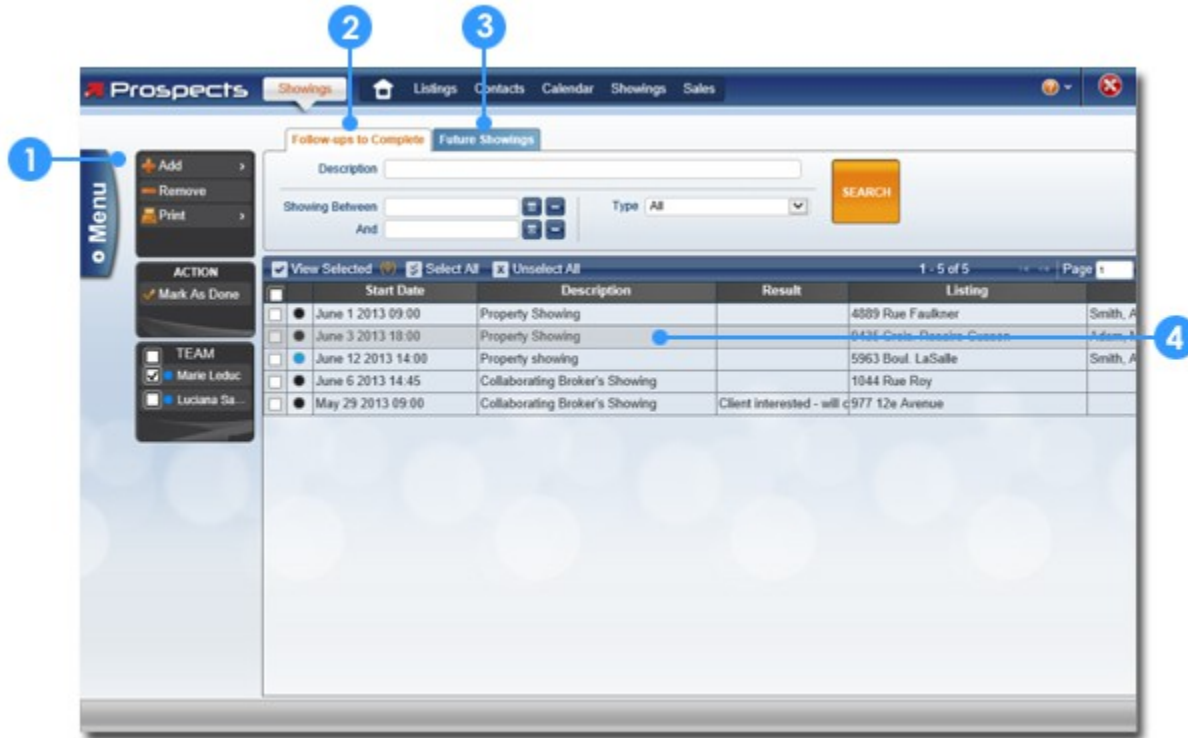
You can view/manage your team's schedule with the **Team** box.

5. **Print Your Schedule**

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

Showings

The Showings section 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

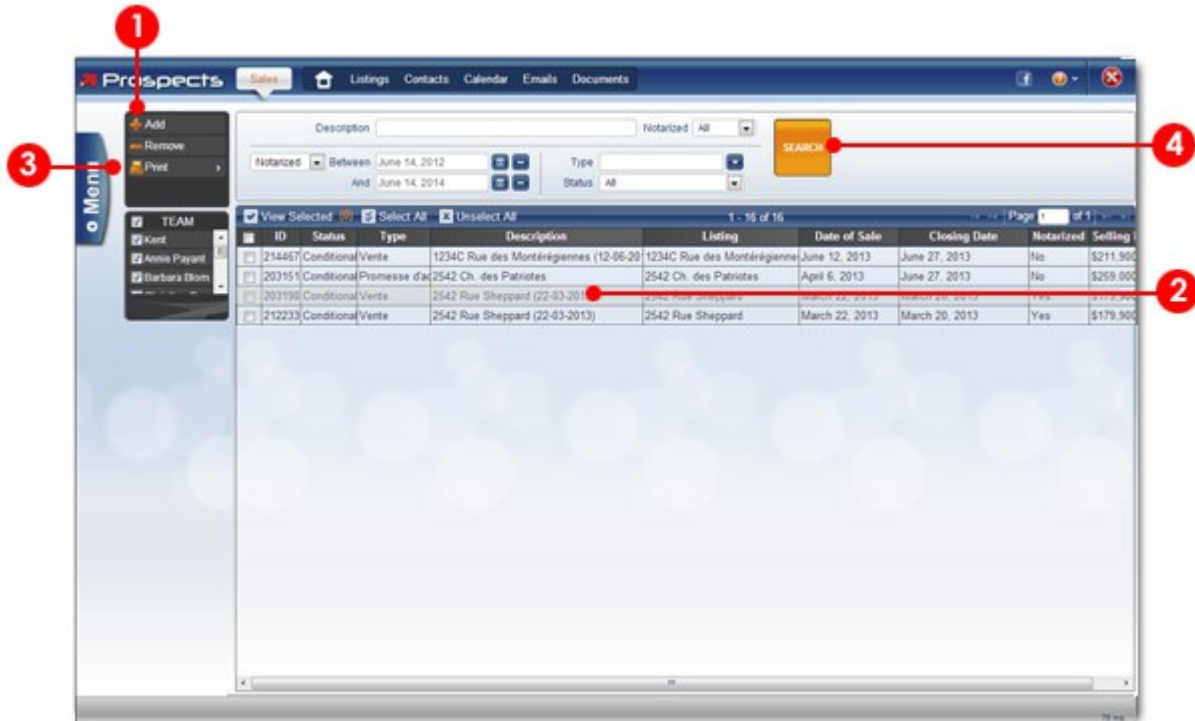
You will find all your scheduled future showings in a list to manage them more efficiently.

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 it.

Sales

The Sales section allows you to manage your transactions as well as follow up on any of your conditional sales.



1. Create A Sale's Report

The **Add** button allows you to create a sale in your software.

2. View A Sale

To display a preview of a sale you have to click on it once. If you wish to view its full file, double-click on it.

3. Print A Transaction Report

The option to print a transaction report for any selected sale is located under the **Print** menu.

4. Search For A Sale

The search engine located above the sales list allows you to find any existing sale with the displayed search parameters.

Dashboard

The Dashboard gives you a quick view of the work you need to accomplish within the next few days as well as the details of any involved contact and/or listing.



Available Help

Online:

You can find the list of *Frequently Asked Questions* (FAQs) on the *Prospects* official website at 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:
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

By Social Media:

You can also follow us on Facebook and Twitter!



www.facebook.com/prospects



www.twitter.com/prspcts