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Overview

Prospects CRM is a customer relationship manager with many features that can help bring together different aspects of your business. Here are a few examples:

Contacts Management
To-Do Lists
Calendar Appointments
Reminders
Outgoing Emails & Letters (referred to as "Campaigns")

Prospects CRM is also the only customer relationship tool that is seamlessly integrated with Matrix meaning that data can flow between the two systems.

In this course, we will focus on two outstanding features of Prospects CRM: Text Templates and Action Plans.
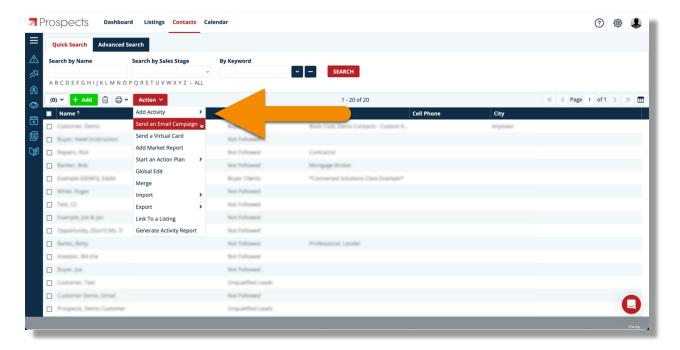
Text Templates

A text template allows you to create a particular message just once then use it again and again in your business. For example, perhaps you send an introduction email to
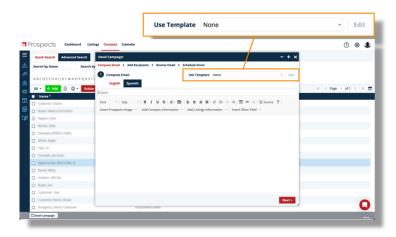
every prospect/customer on the first day you meet…Rather than having to rewrite that introduction each time, or search for the text of a previous message to copy/paste, you could simply open a pre-built template and send it out immediately!
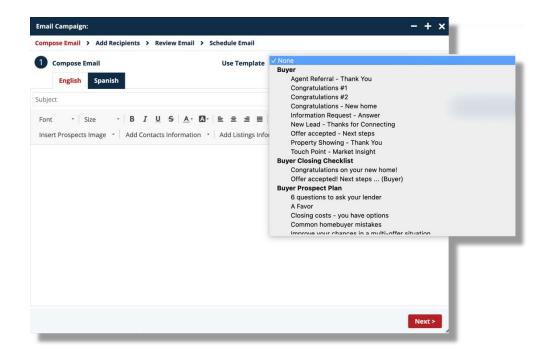
Accessing Existing Templates

Prospects CRM has a variety of templates already created and its library is available in two convenient locations. From the Contacts section, click the red **Action** button and select 'Send an Email Campaign' from the dropdown. This option is available from either the list view (as shown below) or from within an individual contact record.

When selected, the Email Campaign window opens and there will be a dropdown menu near the upper-right allowing you to choose a template.
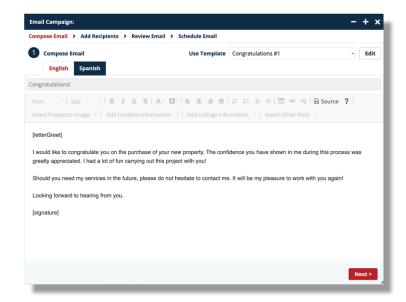
Templates are sorted alphabetically by category and the list can be scrolled to reveal the expansive selection of options. Default categories include templates designed for buyers, sellers, prospecting, holiday communications, etc.
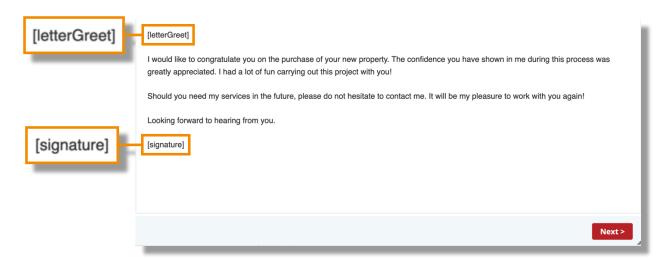
Once a selection is made, the template text populates the subject line and body of the email message instantly. All the templates are available in English while certain templates have both an English and Spanish version. When applicable, toggle between the versions using the tabs above the Subject field.
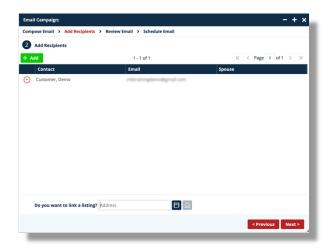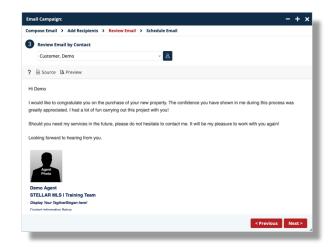
Dynamic Reference Fields

Already off to a great start, the real power of text templates however is through the inclusion of dynamic reference fields. In the Congratulations #1 template for example, notice the two lines that feature words enclosed in brackets:

When you are ready to send out this communication, dynamic reference fields will automatically bring in the applicable data from the contact record(s) you selected to personalize each message with the individual's name and then also display your email signature! (Setting up your email signature is covered in the next section of class)

Click the Next button in the lower-right corner to then review and/or add contacts to whom this message should be sent. Click Next again and a preview of the message will be shown along with the data brought into the dynamic fields.
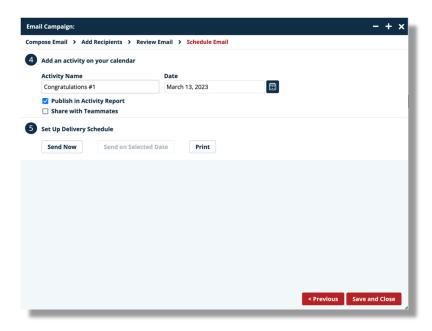

In this display, you may also use the dropdown to review the message for each contact if you have multiple recipients selected.

Note: If a text template includes a dynamic reference field, but that field is empty (for instance) in a contact record, that area of the template will appear blank.

In the final step, you can then choose to send the email on a specific date in the future or immediately. Another option however is to print the template. Although the window is titled "Email Campaign:", this entire process can also be used to customize printed correspondence as well! Click the Print button to not only send the template to a printer but you will also be prompted with an option to create labels and envelopes for the contact(s)!
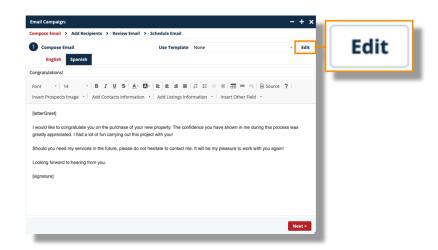

Edit & Manage Text Templates

Editing

As you review the wide assortment of templates available from the dropdown menu in the first step of an email campaign, you may decide that you would like to customize them to suit your individual business needs and communication style. Once the text of a particular template is displayed, click the Edit button to unlock it and make your desired changes. Note that once the Edit button is clicked, the name of the previously selected template is removed, and the dropdown menu then reads "None".

You may then modify any of the prewritten text as well as add or remove any dynamic reference field(s), your email signature (when applicable), etc.
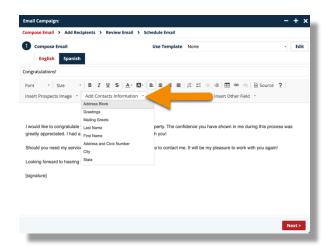
For instance, if you never set up the [letterGreet] for your contacts but wanted to immediately use the Congratulations #1 template, click the Edit button to unlock the text area, remove the bracketed reference, and then simply type in the greeting and name of the recipient.

Quick Tip: Prospects CRM allows bulk editing from the Actions button in the Contacts module if you wish to make global changes, such as assigning a Greets value to multiple contacts at once.

If you intend to send out the same communication to multiple contacts and want each to be personalized you could instead add in a different dynamic field, such as the first name of the contact.

In the toolbar just above the message body, locate the option labeled **Add Contacts Information** and click it to reveal different dynamic reference fields that you may place into the message.
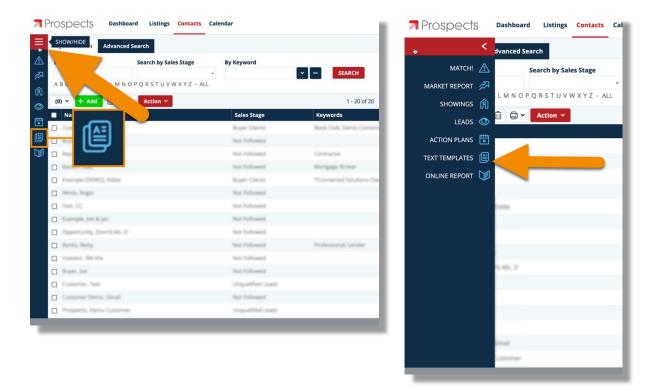
Once you have customized the campaign, follow the steps discussed previously to either email or print out your edited text.

Note: When editing a template direct from the Email Campaign window, your changes are going to be applied only to that single instance and does not permanently change the original template. This is why the Use Template dropdown menu displays "None".

As a reminder, the library of text templates within Prospects CRM is available in two convenient locations. Now that the foundation of using a template has been set, we can move on to not only modify the existing templates, but also create customized text templates (and Categories) that will appear throughout the system!
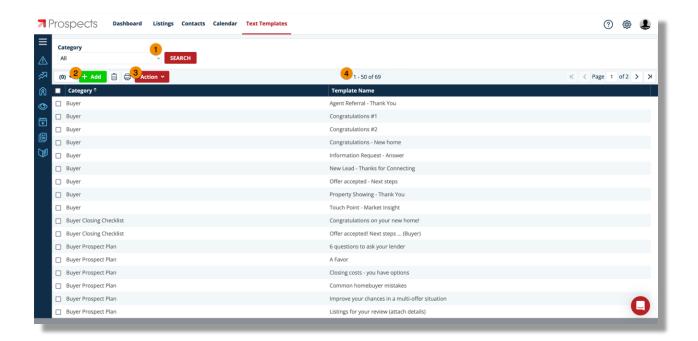
Create Custom Templates

Access the library of Text Templates from the menu along the left side of Prospects CRM. To show or hide the menu, click the three-line icon near the upper-left of the screen.

The Text Templates section opens, and a list of all templates is displayed. Scroll through the list, or you can quickly display a particular category by using the dropdown menu (1) and clicking Search.
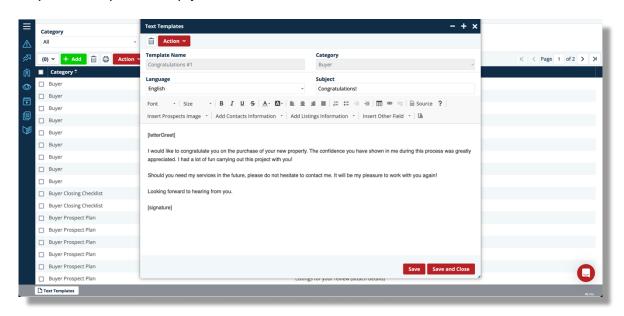
To create a template from scratch, click the Add button (2). If you would like to create your own category that can be used to organize groups of templates or would like to modify the name of an existing category, click the Action button (3).

The number of text templates currently displayed will appear above the list (4). When you first open the Text Templates section, this number will show the total number of text templates and will update depending on any search conducted.

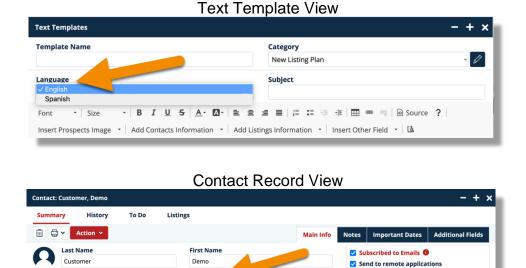To open a template, simply double-click it from the list.

Notice that the interface is very similar to the Email Campaign window highlighted earlier...

If modifying an **existing** template, you may adjust it then save your changes by clicking the buttons in the lower-right corner or choose to copy the template (using the Actions button) which will allow you to then modify the Template Name and Category as well.

With these foundations in mind, be sure to check out the other options within the toolbar when crafting your template in terms of the Font and its Size, perhaps adding a hyperlink, and leveraging dynamic reference fields.

You can create both English and Spanish options for a single template and Prospects CRM will then use the correct version based the Language field selection within an individual contact record.

Text Template View

Contact Record View

As you create more and more templates, remember that you may also categorize them into groups for quick reference. Add a template to an existing category by selecting one from the dropdown menu near the upper-right corner of the Text Templates window (1) or click the pencil icon (2) to go directly to the Category pop-up to Add, Delete, or Modify a category name (3).
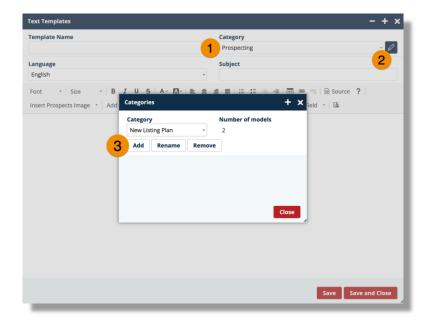
Tip: You may also open the Categories pop-up window from the main Text Templates list display by clicking the Actions button, then selecting **Manage Categories**.

Creating your own Text Templates is a great way to send out personalized communications to groups of contacts, reduce the chance of spelling errors, and really help save you time!
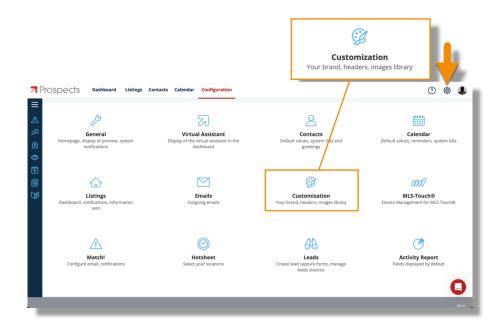
Branding

Before sending out communications, reports, and information to your contacts from Prospects CRM, you will want to upload your agent photo and company logo, select your brand colors, and customize your email signature so that everything will be branded to you.

Agent Branding
To begin branding the system, click the the gear icon in the upper-right corner of the main display and then select **Customization** from the Configuration screen.

A new pop-up window will appear containing three tabs: Brand & Share, Headers, and Images Management.
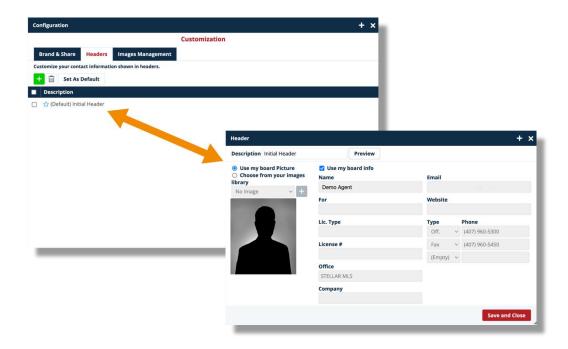

Begin with the Images Management tab and upload your agent photo and company logo from your computer by clicking the **Choose** button and navigating to the location on your computer where the images are stored.

Images added to the Prospects CRM Images Library will then be available throughout the system. Before moving on, be sure to choose your main agent photo in the My Agent Picture section.
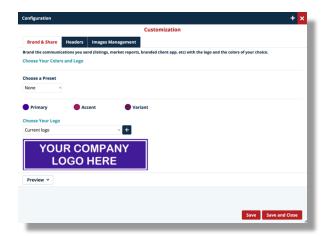
Next, click the Headers tab and double-click the default entry in the list to verify your contact information.

Simply, uncheck the "Use my board info" box should you need to make adjustments to the contact information displayed. Please note that changing the information in Prospects CRM **does not** update your membership record with your local board/association – you would need to contact them directly.

Lastly, click the Brand & Share tab, select your brand colors, and choose your company logo from the drop down menu of those images uploaded earlier on the Images Management tab. Once finished, click the Save and Close button to lock in your changes.
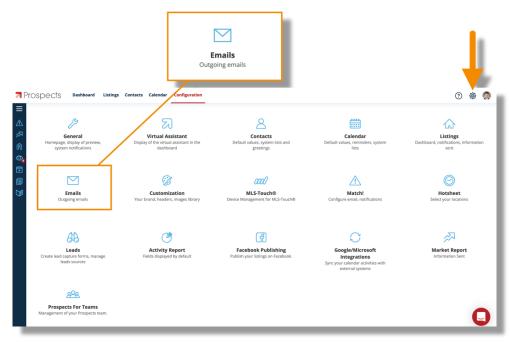

IMPORTANT NOTE: You are responsible for ensuring that you have permission to use any trademarked logos and branding.
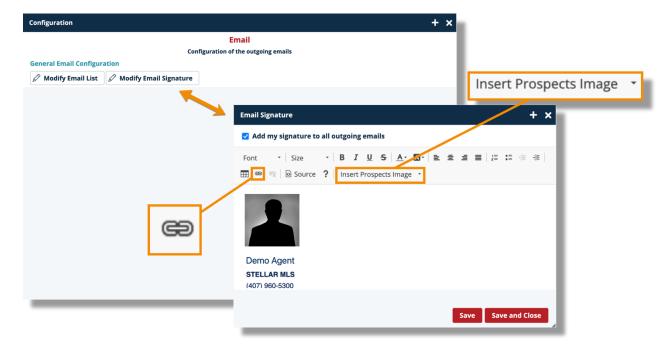
Email Signature

With your branding complete, return to the Configuration screen and select the Emails section to set up your outgoing email signature. Reminder, to access the Configuration options, click the gear icon in the upper-right corner of the main display window.

Once the pop-up window opens, click Modify Email Signature to begin the process.

Use the formatting tools located in the first row of the tool bar to change the text entered for your signature. To include an image in your signature, simply choose the Insert Prospects Image option and a drop-down menu will display all images that were uploaded into the Images Library earlier in the Branding section. To add a hyperlink, click the link icon in the second row of the tool bar and fill in the desired fields. When ready, complete the process by clicking the red Save and Close button in the lower-right corner.

With your branding complete, and a solid understanding of the benefits of accessing and creating Text Templates, it is time to highlight another great feature of Prospects CRM: Action Plans.
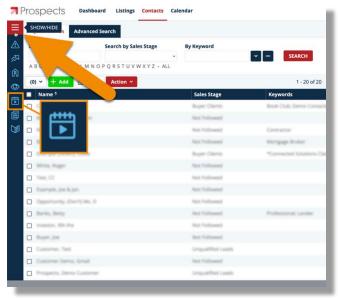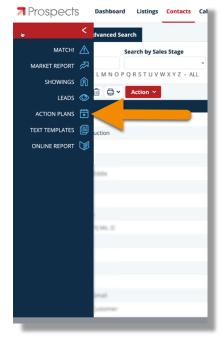
Action Plans

Action Plans are combinations of different activities such as email campaigns, to-do's, follow-up calls, reminders, appointments, and more. You may take advantage of ready-to-use plans or create your own.

Once an Action Plan is started, Prospects CRM then helps automate the sequence of activities so that you can help stay organized and on track with your business.
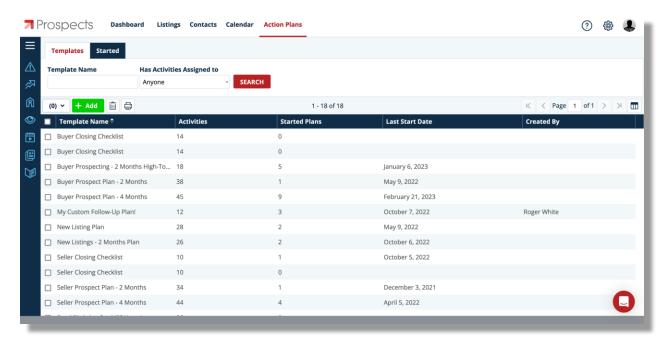
Access Existing Action Plans

Access the entire library of Action Plans from the menu along the left of Prospects CRM. Remember, to show or hide the menu, click the three-line icon near the upper-left of the screen.
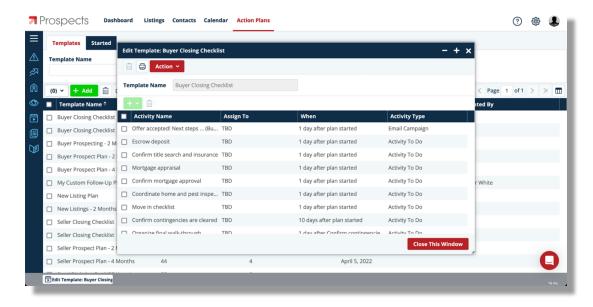
The Action Plans page opens, and a list of all templates is displayed. Scroll through the list, search by template name, or sort by clicking any column header.

In the list view, you can quickly identify the number of activities associated with a particular Action Plan as well how many times that plan has been started, its last start date, etc.

Open any existing Action Plan by double-clicking its name in the list display. A pop-up window opens where you can review the individual activity names, their availability, as well as the activity type, etc.
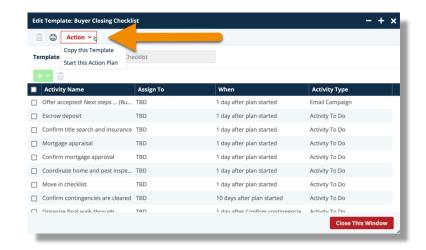
Did you notice that this particular plan cannot be edited? This is because it is one of the pre-built templates in Prospects CRM.
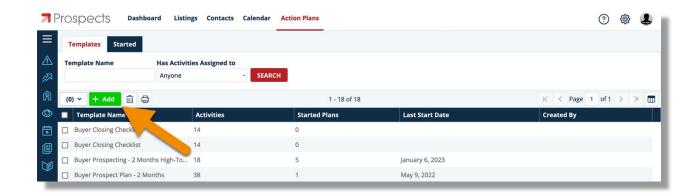
Tip: If you find an Action Plan template that aligns with your business, but want to make a few changes, click the Action button and select **Copy this Template.**
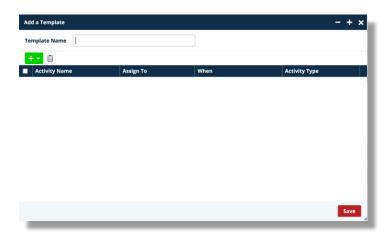
The copy can then be edited.
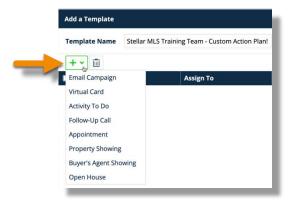

Create a New Action Plan

To create an Action Plan from scratch, simply click the green **+ Add** button above the main list display.

A pop-up windows opens, and you can enter a name for your template then add individual items using the green button below the Template Name field.
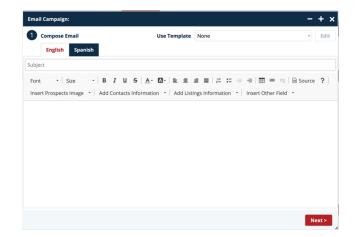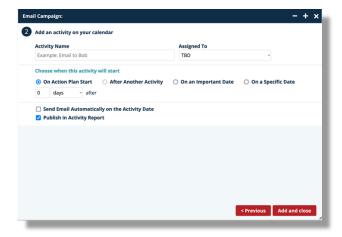
There are a variety of settings available for each type of activity. For example, selecting Email Campaign opens an interface like the one reviewed earlier.

The first window allows you to compose a new message or choose a Text Template.

Once finished, click Next in the lower-right corner.

The following window allows you to name the activity and choose from a variety of options on how it will fit into the Action Plan sequence.
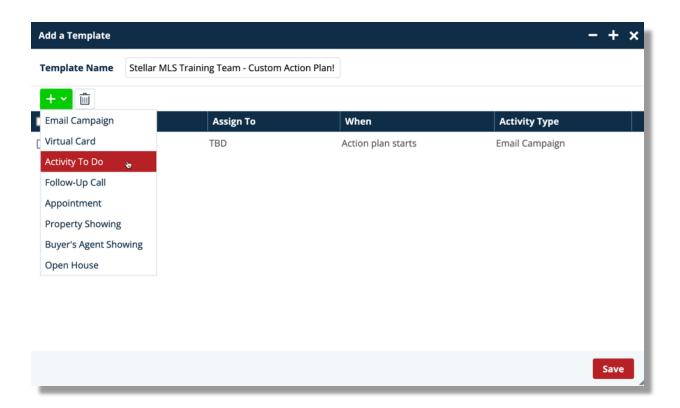
These settings can become very powerful to help keep you on track with your business! For instance, maybe you want to send an email a specific number of days after the plan begins, after another activity (once you add more, of course!), on an important date (as defined in a contact's record), or even on a specific date.

If you wish, check the box to have Prospects CRM automatically send the message on the activity date rather than only having it appear on your calendar as a reminder.

Once you have the appropriate options selected, click the **Add and close** button.

Back in the Add a Template window, continue adding items using the green button. For this example, an **Activity to Do** will be added from the menu as well.
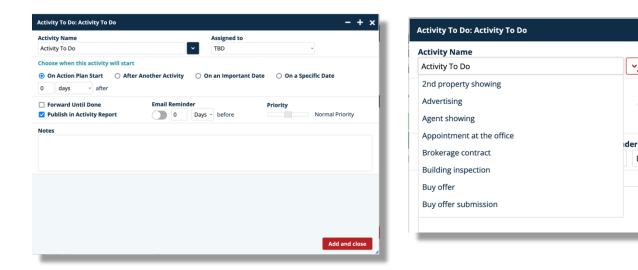

When naming an **Activity To Do**, select a preset by clicking the arrow to the right of the field and scrolling through the list or, alternatively, begin typing and the list will filter.

You may also enter a custom name to be used only for this particular Action Plan item.
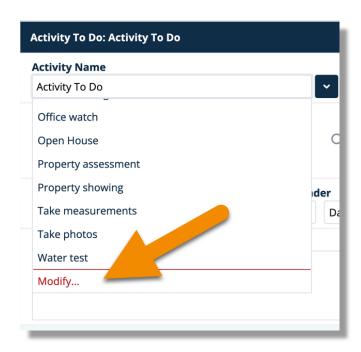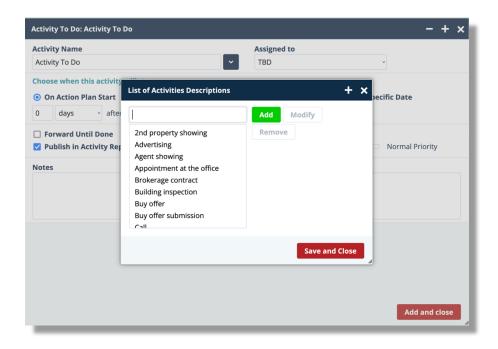
If you would like to change the text of the presets shown in the Activity Name list, or add a custom name to select in the future, use the **Modify…** option.
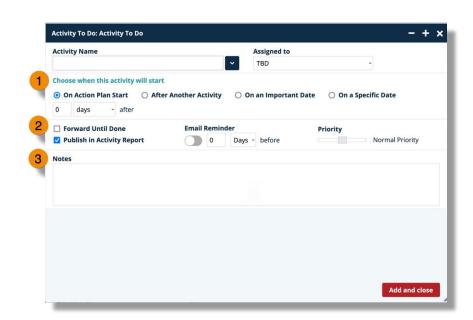
Once you select **Modify…**, the **List of Activities Descriptions** display window opens with options to Add, Modify, and Remove items. Make your desired changes (if any), then click the **Save and Close** button.

Back on the Activity To Do window:

1. Choose when your activity is to start
2. Review its additional options
3. Add notes if desired

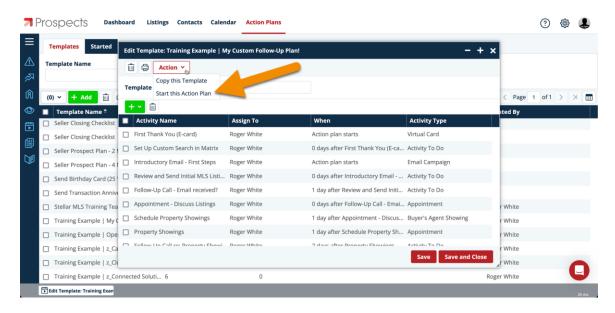When ready, click the **Add and close** button.

Lastly, click the **Save** button in the Add a Template window to store your template!

Once you have selected a template, modified an existing one, or created your own, it is very easy to then start an Action Plan.
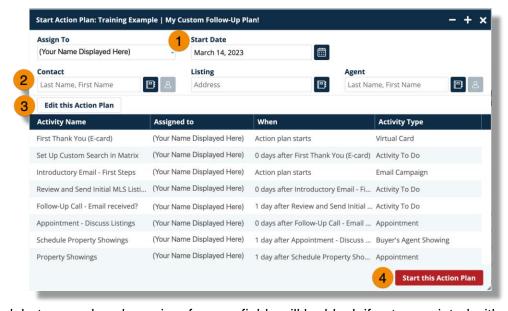
Starting an Action Plan

From the main list, double-click to open an Action Plan, click its **Action** button, then choose **Start this Action Plan**.

There are numerous locations throughout Prospects CRM where you may opt to start an Action Plan. Before the plan begins however, you will have an opportunity to confirm several options such as the Start Date (1), if you would like to associate it with a Contact, Listing, or Agent (2)*, and there is even an option to edit the plan if desired (3), before clicking the button to confirm (4).
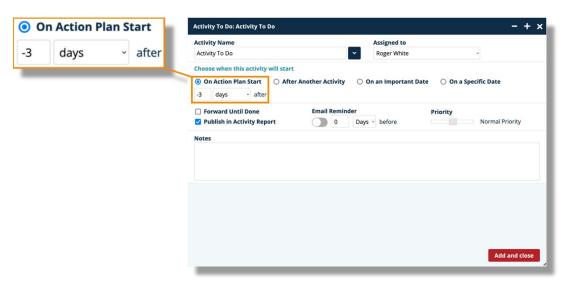

*(optional, but remember dynamic reference fields will be blank if not associated with a record)
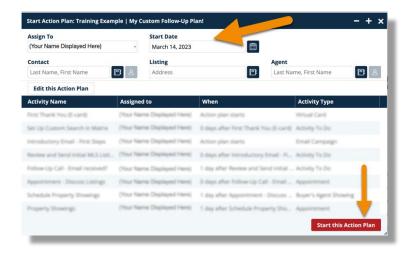
BONUS TIP:

It is also possible to create an Action Plan that has items that start before a certain date so that you may work backwards. For instance, an Action Plan could be created to prepare for an upcoming Open House.

When adding items to the plan, such as an Activity To Do, just enter a negative number for the activity start date.

Once an action plan is started, everything is set into motion based on the Start Date!

From there (and depending on your settings), you may be notified by email of certain activities, review items on the Prospects CRM calendar, sort through all active plans, and start leveraging the Prospects CRM Virtual Assistant located on the Dashboard.

Incorporating Text Templates and Action Plans into your business can help make Prospects CRM one of the keys to maintaining consistency, improving efficiency, and ultimately saving you time!