

Step-by-Step Guide: Setting Up a Space in Perplexity for Prospect Research Projects

Below is a detailed, easy-to-follow instruction guide you can adapt for users to set up a Perplexity Space specifically tailored for Prospect Research projects. These steps will enable users to organize, share, and maximize their research processes effectively.

1. Create a New Space

- Log In: Go to [Perplexity AI](#) and sign in to your account.
 - Access 'Spaces': On the main dashboard or sidebar, select the “Spaces” section.
 - Start a New Space: Click the “+ New Space” or similar button (the location may vary but it’s usually at the top right or left).
 - Name Your Space: Give your Space a clear, descriptive name (e.g., “Prospect Research Project – [Your Organization]”).
-

2. Customize Your Space

- Add a Description: Write a brief summary explaining the Space’s purpose (e.g., “Central hub for major gift prospect research and file sharing”).
 - Choose Privacy Settings: Decide if your Space will be public or private. For sensitive donor research, private is usually preferable.
-

3. Upload and Organize Files

- Locate 'Add Files' Button: In your new Space, find the “Add files,” “Upload,” or “Attach” option (often labeled with a paperclip or plus icon).
- Select Files to Upload: Click the button and browse your computer or cloud storage for relevant documents (e.g., prospect lists, research reports, giving histories, or sample prospect profiles).
- Upload your Prompts & Templates: If you have specific prospecting prompts or checklists, upload those so others can use and reference them directly in the Space.

- Organize Files: Use folders or organize files by naming conventions (e.g., “Profiles_2025,” “Screening_Reports”) to keep your workspace clear and efficient.

Benefits of Adding Files:

- Centralizes All Research Materials: No more searching through emails or cloud drives for needed documents; everything is together.
 - Facilitates Collaboration: Team members can access the latest materials, templates, and findings in one shared location.
 - Supports Version Control: Upload updated documents as you work; Perplexity keeps track of changes.
 - Improves Efficiency: Faster access to forms, templates, and research tools.
-

4. Add Prompts and Instructions

- Create Posts or Notes: Use the Space’s posting capability to add helpful instructions, links, or tips for your team.
 - Insert Step-by-Step Prompts: Post your pre-written prospect research prompts or scripts for team usage. Label clearly for context.
-

5. Invite Team Members

- Invite Collaborators: Click the “Invite” or “Share” option in your Space.
 - Set Permissions: Assign appropriate roles (viewer, editor, admin) to control what collaborators can do within the Space.
 - Send Invites: Email or share the invite link directly with your team.
-

6. Collaborate and Maintain

- Share Insights: Team members can post findings, comment on documents, and contribute updates in real-time.
 - Update Regularly: Refresh files and instructions as necessary to ensure your Space remains relevant and helpful.
 - Monitor Activity: Use notifications or activity logs to track engagement and changes in the Space.
-

7. Download and Share as Needed

- **Export Files:** Individual files can usually be downloaded directly from the Space if you want to archive offline copies or share with others.
 - **Share Read-Only Links:** For select resources, you can generate links for broader distribution while keeping sensitive data protected.
-

Quick Tips & Best Practices

- **Consistency Is Key:** Use standardized file naming for easy tracking.
- **Leverage Search Features:** Spaces offer built-in search to quickly find keywords across posts and files.
- **Back Up Critical Files:** Always retain local or cloud backups of sensitive or irreproducible work.