

### **Prophet Quick Start Guide**

Get started using Prophet right away by spending a few minutes reviewing these tips.

This guide will walk you through the following:

1. Looking up Contacts in Contact Manager.
2. Creating Contacts in Contact Manager.
3. Creating Opportunities for your prospects.
4. Looking up existing Opportunities.
5. Prophet Ultimate
6. How to get support

### **Contacts**

The Contact Manager is the central dashboard for managing contact and company information in Prophet. During the installation of Prophet, you were asked which Outlook Contact folder you wanted to work with in Prophet. The contacts in the folder you select will automatically populate the Prophet Contact Manager. The Outlook Contact folder you selected to work with is called the 'Working Contact Folder'.

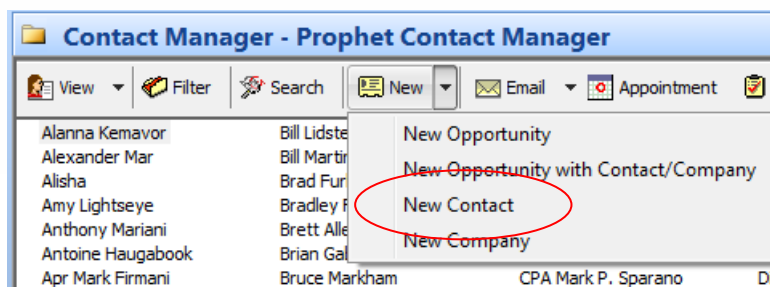
#### **Look up Contacts**

1. Highlight one name in Contact Manager
2. On your keyboard, start typing the name you want to look up. Your cursor will move as you type.

#### **Add Contacts**

To add additional contacts to your listing

- a. Click on the arrow to the right of the **New** button in Contact Manager.
- b. Select **New Contact**.
- c. A blank Contact Item will display. Fill out the information you have.
- d. Click **Save and Close** in the Contact Item.
- e. This new contact will appear in your list of contacts in Contact Manager and it is also saved to your Working Contact Folder in Outlook.

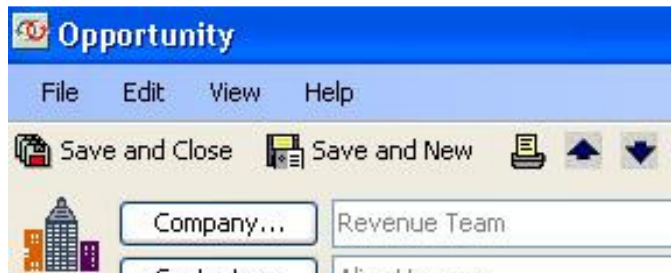
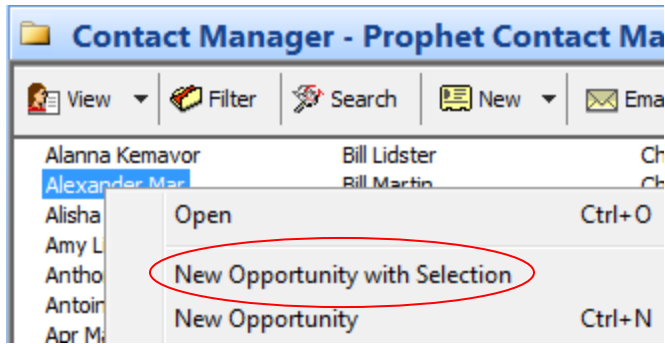


### **Opportunities**

You should create an Opportunity for all of your prospects. Every time you work on that particular deal, you will want to access the Opportunity you created. In the Opportunity, you are going to track your notes and the details for that particular lead.

#### **Create an Opportunity in Contact Manager**

1. Go to Contact Manager.
2. Right Click on the Contact Name you wish to create a new opportunity for.
3. From the list, select "**New Opportunity with Selection**"
4. A new opportunity screen will display.



### Looking up existing Opportunities

Every time you are working with your prospects, you will want to pull up their Opportunity so you can reference your notes, add new notes, send emails and start tracking detailed information.

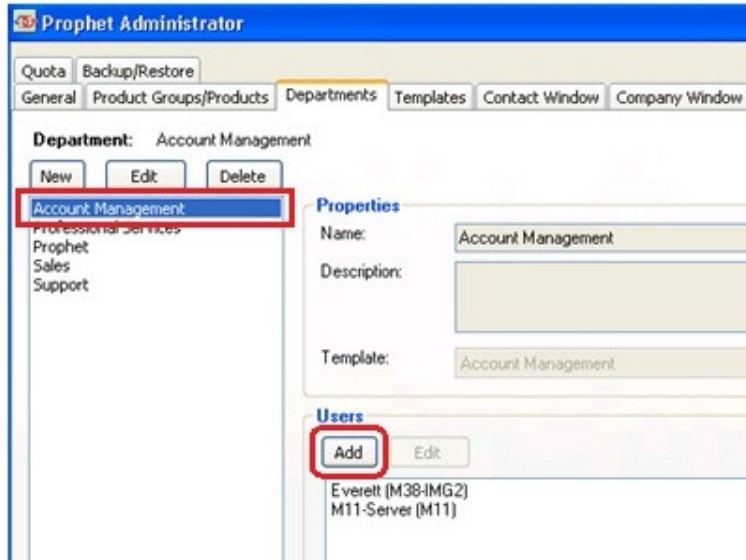
1. Click On Opportunity Manager.
2. The Opportunity Manager lists out all the opportunities you have created.
3. Double click on any opportunity you have listed there and the Opportunity window will be displayed.

### Prophet Ultimate

Prophet Ultimate Edition is a World Class CRM built for Microsoft Outlook. It provides extensive collaboration for sharing data and communications with employees within your organization all within the interface of Microsoft Outlook.

### Assigning Users to a Department

1. On the Prophet Ultimate Server, open the Prophet Administrator (Contact Manager -> Tools)
2. Click to the **Departments** tab
3. Select a Department. The Department Properties will be displayed
4. To add a User to the selected Department click the **Add** button
5. Select the User that you would like to assign to the Department and click **OK**



### User Management: Prophet Ultimate Server

1. On the Prophet Server, open the Prophet Administrator (Contact Manager -> Tools)
2. Click to the User Management Tab

### User Management: Cross Department Access

Cross Department Access gives the selected user(s) ability to see Record data of other Departments that they do not belong to. This applies only to Record/opportunity data, not contact or company data. The current settings are displayed in <>.

Each Department that is configured on the Prophet Ultimate Server will be displayed in the list.

The Three permission choices are:

- No Access: Users do not have access to seeing or changing Department Record data
- Read-Only: Users have access to viewing Department Data. The opportunity window will be displayed in Read-Only mode
- Read-Write: Users have access to view and edit Department opportunity data

### User Management: Data Settings

The Data Settings will determine how much freedom a client is granted when working with Data. Editing and deleting Notes, Attachments and managing the visibility of data are the functions that can be managed here.



### How to get Support

Submit a support ticket [online](#)  
 Send us an email: [support@avidian.com](mailto:support@avidian.com)  
 Give us a call: 1 800 898 8615

2053 152<sup>nd</sup> Ave NE  
 Redmond, WA 98052