

Prophet Quick Start Guide

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

1. Looking up Contacts in Contact Manager.
2. Creating Contacts in Contact Manager.
3. Creating Opportunities for your prospects.
4. Looking up existing Opportunities.

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'.

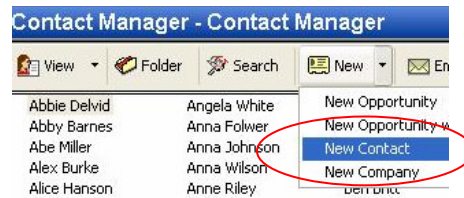
Look up Contacts

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.

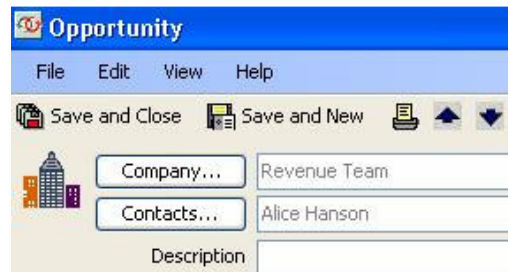


Opportunities

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 Contact"**
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.