

Prophet CRM

Campaign Manager

User Guide

Version 1.3

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1. Prophet Campaign Manager Features and Benefits

Features	Benefits
Embedded in Microsoft Outlook for Windows PCs and Prophet CRM	Built into an environment people use every day for managing their emails, contacts and Sales Pipeline.
Create Outlook Email Templates with Personal Salutations First Name, Last Name, Company Name, Title, Suffix	Emails are personalized so recipient feels it is like a personal email.
Send Email Campaigns through Prophet CRM to Contacts, Companies and Opportunities	An all-in-one solution for Email Marketing with Prophet CRM
Send Personalized Emails to Targeted Lists of Contacts in Prophet	Saves time compared to sending out high volumes of emails individually. Sent through Outlook, so it is treated like a one-to-one Outlook Email
Email recipients can Unsubscribe through a link in the Emails	Conforms to Industry Requirements. Does not pester people who do not wish to receive emails.
Customer List Management Add, store, and organize your contacts in one place, and segment lists to target the right people.	Prevents bouncing back and forth between programs and synching and updating lists.
Auto-Notates Activity in the Contact Company and/or Opportunity that the Email Campaign was sent from with the sent time date, subject line, and user.	Tracking Campaign Manager User Email Campaign Activity for better visibility of communications.
See who's Opening Emails and Clicking Links in Emails	Measure the responsiveness of Campaign email recipients.

2. Getting Started

First you must have an Active License for Prophet CRM. Your license must be enabled with the Campaign Manager feature.

Contact our Customer Success team to request to have this feature enabled.

customersuccess@avidian.com

Once you have the Campaign Manager enabled you will see a new folder in the Avidian Prophet folders called Campaign Manager. Click on this folder to begin using Campaign Manager.

The screenshot displays the Prophet Campaign Manager interface within Microsoft Outlook. The top ribbon includes tabs for File, Home, Send / Receive, Folder, View, Help, and PROPHET. The left sidebar shows the 'Campaign Manager' folder selected under 'Favorites'. The main pane displays a list of campaigns with the following data:

Campaign Name	Users	Sender Email	# of Audience	# of Occurrence	Updated Date	Created Date
Campaign May 3 - 1	Warren Stokes	warrens@avidian.com	12	13	5/9/2023 7:00:06 AM	5/9/2023 11:55:30 AM
Hollywood Promo 3 emails	Warren Stokes	warrens@avidian.com	40	7	5/11/2023 3:48:08 PM	11/22/2022 1:34:18 PM
Mailinator Promo 1	Warren Stokes	warrens@avidian.com	0	2	5/14/2023 6:15:23 PM	11/22/2022 1:23:22 PM
May Campaign 1	Warren Stokes	warrens@avidian.com	7	0	5/9/2023 3:45:48 PM	5/9/2023 3:45:48 PM
Test Campaign 2023-11-22 V1	Warren Stokes	warrens@avidian.com	0	2	11/23/2023 6:57:02 AM	11/23/2023 9:50:32 AM
Test Campaign 2023-11-22 V2	Warren Stokes	warrens@avidian.com	0	2	5/14/2023 3:21:19 PM	11/23/2023 9:56:07 AM

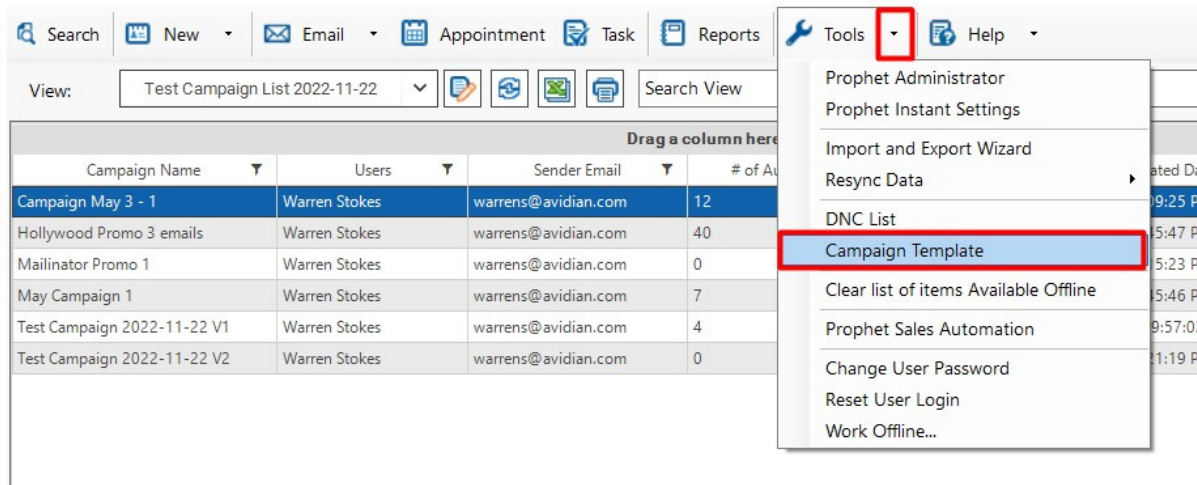
Below the list, the 'Occurrence' tab is selected, showing a detailed view of the campaign's execution. The table below represents the data shown in this view:

Occurrence Status	Scheduled Time	Executed Time	Canceled Time	# of Recipients
Executed	5/3/2023 1:55:00 PM	5/3/2023 11:56:05 AM		12
Executed	5/9/2023 7:00:00 AM	5/9/2023 7:00:06 AM		12
Executed	5/16/2023 7:00:00 AM	5/16/2023 7:00:04 AM		12
Scheduled	5/23/2023 7:00:00 AM			0
Scheduled	5/30/2023 7:00:00 AM			0
Scheduled	6/6/2023 7:00:00 AM			0

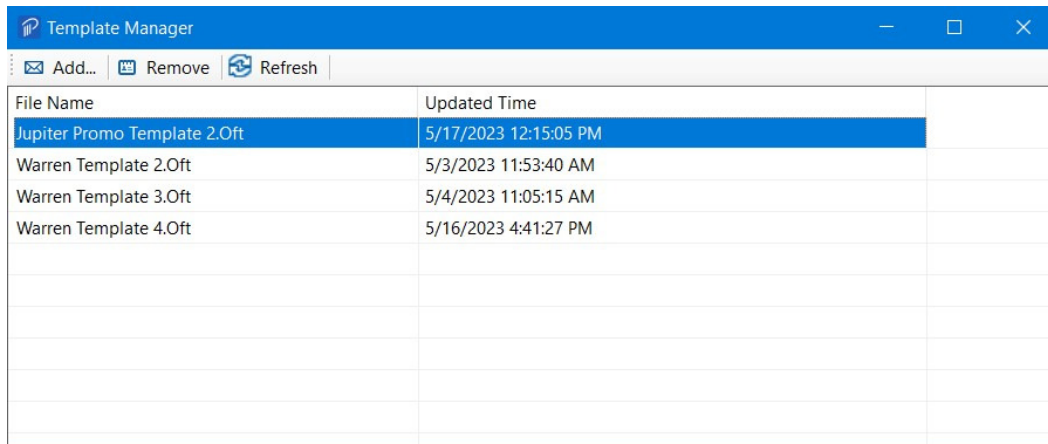
The interface also shows a status bar at the bottom indicating '6 Campaigns (1 Selected)', '13 Occurrences', and 'Connected to Prophet Server'.

3. Configuring Campaign Templates.

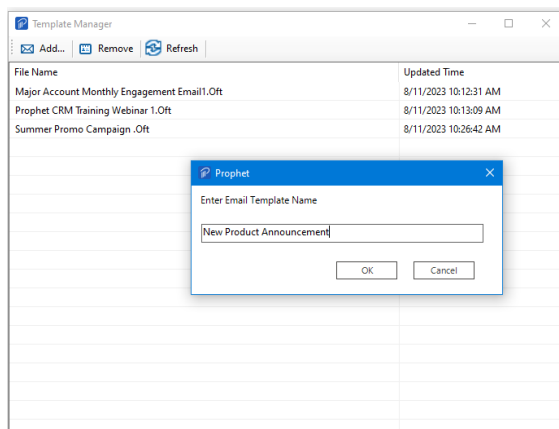
Before you can launch a Campaign, you will need to create one or more Email Templates. When in any of the Prophet manager folders click on Tools drop down arrow > Campaign Template.



Template Manager Opens



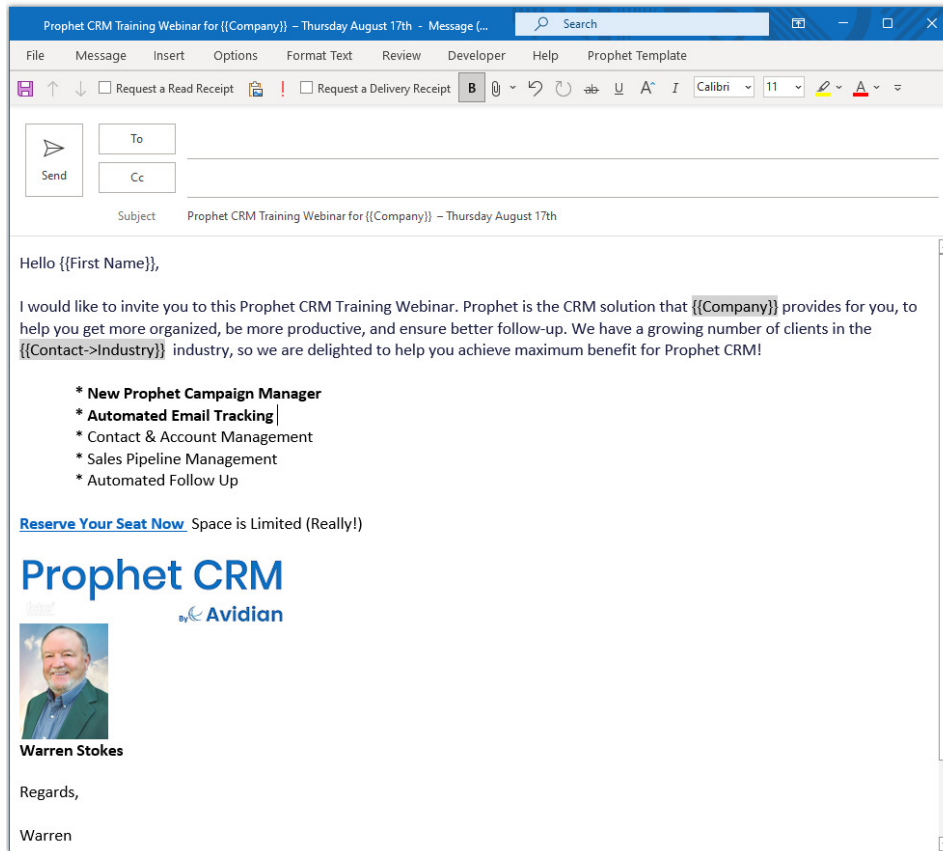
Click "Add" to create a new template or double click on a template to edit an existing template. If it is a new template, enter the Name of the new Template.



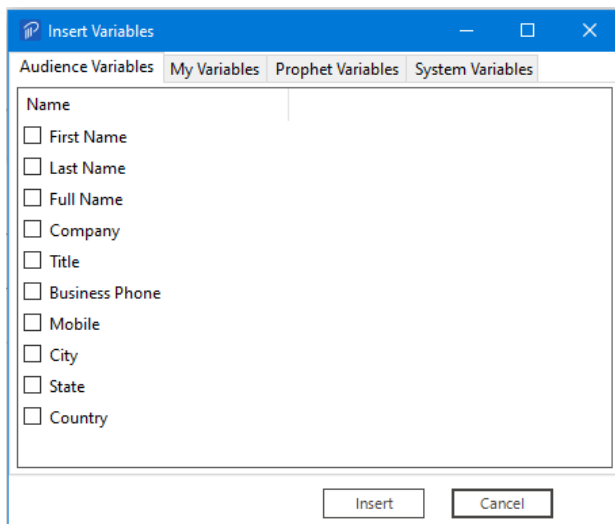
Then compose your template. When sending out the campaign, Prophet will insert the Variable Fields you inserted. Click “Save Template” under the Prophet tab to save.

Below are some Fields that can be auto populated in the email body or subject line:

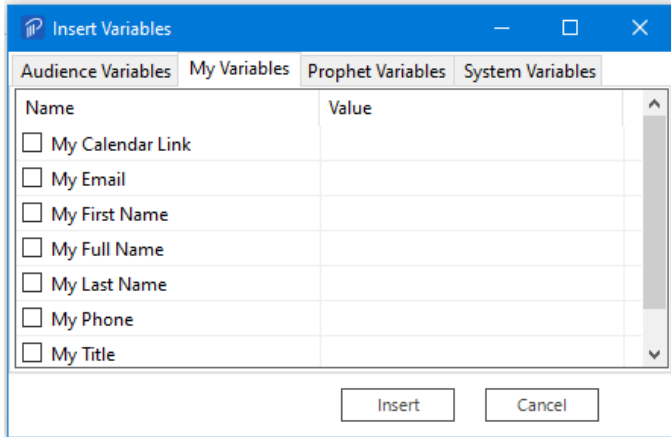
Note: An Unsubscribe Link will automatically be inserted into your template.



Audience Variable Fields



My Variable Fields

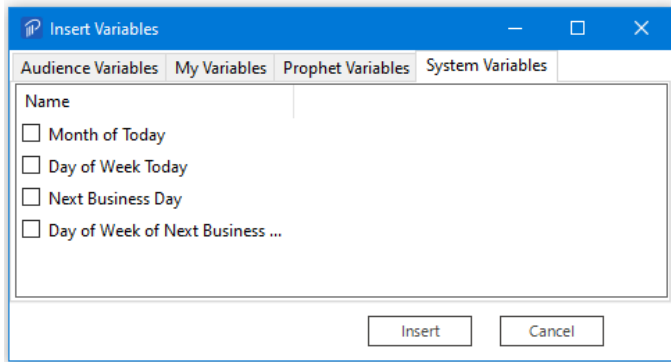


The "Insert Variables" dialog box is shown with the "My Variables" tab selected. It contains a table with two columns: "Name" and "Value". The table lists several variables with checkboxes next to them:

Name	Value
☐ My Calendar Link	
☐ My Email	
☐ My First Name	
☐ My Full Name	
☐ My Last Name	
☐ My Phone	
☐ My Title	

At the bottom of the dialog are "Insert" and "Cancel" buttons.

System Variable Fields



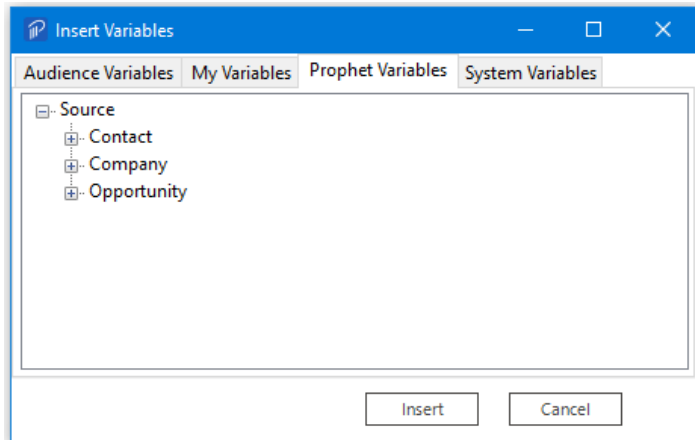
The "Insert Variables" dialog box is shown with the "System Variables" tab selected. It contains a table with two columns: "Name" and "Value". The table lists several system variables with checkboxes next to them:

Name	Value
☐ Month of Today	
☐ Day of Week Today	
☐ Next Business Day	
☐ Day of Week of Next Business ...	

At the bottom of the dialog are "Insert" and "Cancel" buttons.

Prophet Variable Fields

All the Contact, Company and Opportunity fields are available for use in templates. This includes the customizable fields throughout Prophet.



The "Insert Variables" dialog box is shown with the "Prophet Variables" tab selected. It contains a tree view under the "Source" category:

- Source
 - Contact
 - Company
 - Opportunity

At the bottom of the dialog are "Insert" and "Cancel" buttons.

4. Creating Campaigns

Once you have your templates configured, you can make a campaign by clicking “New”(drop down)->”New Campaign”.

The screenshot shows the Prophet CRM interface. On the left is a sidebar with a 'Favorites' section and a 'warrens@avidian.com' section. The main area has a top navigation bar with icons for Search, New, Email, Appointment, Task, Reports, Tools, and Help. The 'New' dropdown menu is open, showing options: New Opportunity, New Campaign (highlighted with a red box), New Contact, and New Company. Below the menu is a table of campaigns with columns: Campaign, Sender Email, # of Audience, # of Occurrence, Updated Date, and Created Date. The table contains four rows of campaign data. Below the table is a pagination bar showing '100' items per page and '1/1 Pages 5 Records'. At the bottom, there is a table of audience members with columns: Name, Email, Source, DNC, and DNC Reason. The audience table contains six rows of contact information.

Campaign	Sender Email	# of Audience	# of Occurrence	Updated Date	Created Date
Campaign May 3	warrens@avidian.com	12	13	5/4/2023 5:09:25 PM	5/3/2023 11:55:30 AM
Hollywood Promo 3 emails	warrens@avidian.com	40	7	5/4/2023 3:31:05 PM	11/22/2022 1:34:18 PM
Mallinator Promo 1	warrens@avidian.com	85	2	11/23/2022 3:28:11 PM	11/22/2022 1:23:22 PM
Test Campaign 2022-11-22 V1	warrens@avidian.com	4	2	11/22/2022 9:57:02 AM	11/22/2022 9:50:32 AM
Test Campaign 2022-11-22 V2	warrens@avidian.com	0	2	5/4/2023 3:21:19 PM	11/22/2022 9:56:07 AM

Name	Email	Source	DNC	DNC Reason
Angelina Jolie	AJ@pittintl.com	Contact	False	
Anthony Hopkins	ahopkinssecretemail@gmail.com	Contact	False	
Benji Madden	bmadd@diafam.com	Contact	False	
Billy Goodman	bg@thedude.com	Contact	False	
Billy Joel	Billy@Joellindus.com	Contact	False	
Brad Pitt	brad@pittinternational.com	Contact	False	

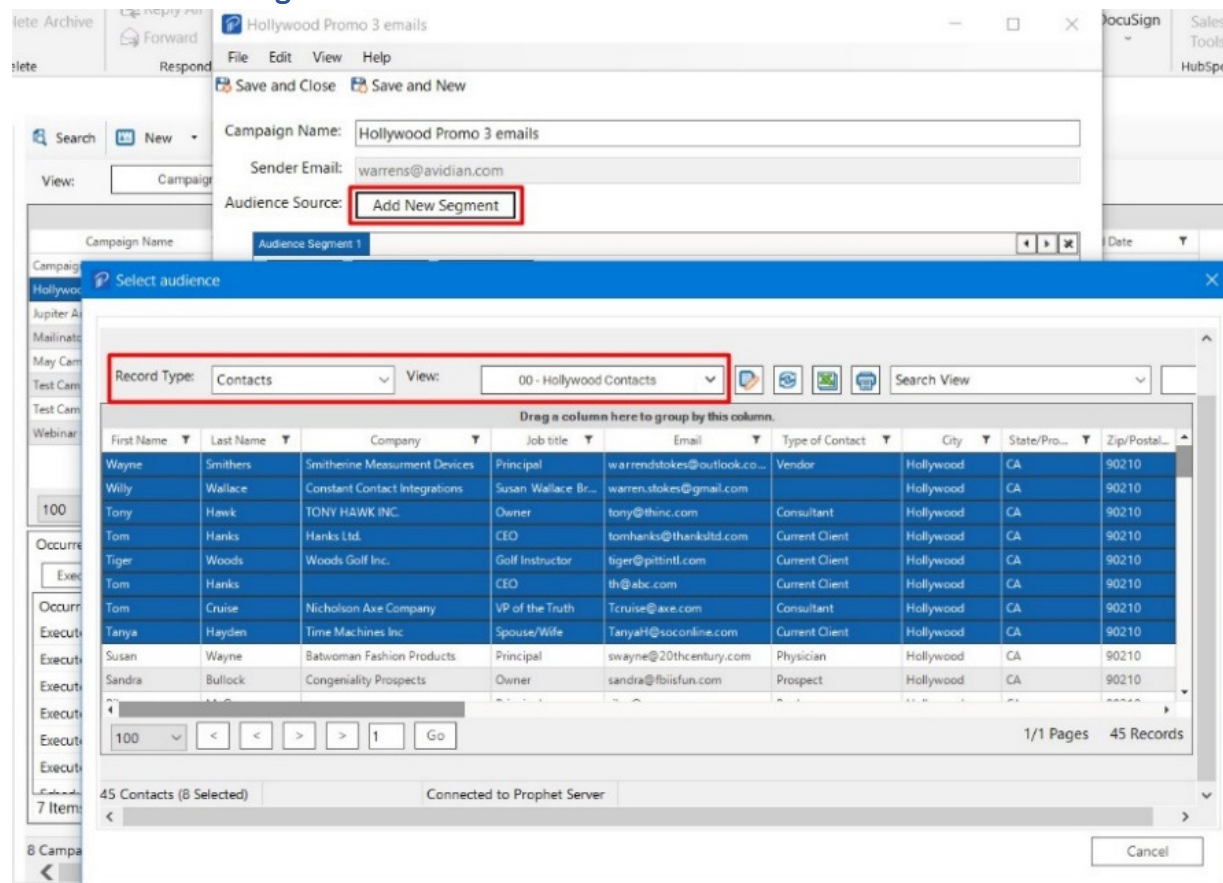
Name your Campaign.

If the “Sender Email” field is blank, Prophet will ask you to authenticate your email when you save and close the campaign.

You can now add email addresses to your campaign. These will be the recipients of your email campaign. You also have the option of adding email addresses from your companies, contacts, and/or opportunities.

For companies and opportunities, you have the option of including all contacts or just primary contacts for the companies and opportunities that you select. For contacts, Prophet will automatically select the business email address of each selected contact.

Select Audience Segment.



You have the option of adding more audience segments if you'd like.

You can also add and remove recipients to your list. All duplicate email addresses will be highlighted for easy removal.

5. Setting the Cadence of When and How Often

In Campaign edit/creation window, you need to set a cadence. The cadence determines when and how often your campaign will be sent out to your recipient list.

Click "Add" under the "Cadence" tab as indicated below.

The following cadence below will be sent once at 10:37 am on May 7, 2023, although you can customize it to include specific dates and frequencies. You will also need to select one of your templates.

Set the Cadence

The screenshot shows the Prophet CRM interface for setting up a campaign. The main window is titled "Hollywood Promo 3 emails" and has a menu bar with "File", "Edit", "View", and "Help". Below the menu bar are buttons for "Save and Close" and "Save and New".

The campaign details are as follows:

- Campaign Name: Hollywood Promo 3 emails
- Sender Email: warrens@avidian.com
- Audience Source: Add New Segment

The "Audience Segment 1" section shows a list of names (Angelina Jolie, Anthony Hopkins, Benji Madden, Billy Goodman, Billy Joel, Brad Pitt, Bradley Cooper) and a "40 Items" indicator. Below this is a "Cadence" tab with an "Add..." button and a "Modify" button. The "Add..." button is highlighted with a red box.

The "Make Recurring" dialog box is open, showing the "Recurrence pattern" set to "Daily" and the "Range of recurrence" from "5/18/2023" to "5/21/2023". The "Email Template" dropdown is also highlighted with a red box, showing options like "Jupiter Promo Template 2.Oft", "Warren Template 2.Oft", "Warren Template 3.Oft", and "Warren Template 4.Oft".

You are free to enter another cadence or save and close the campaign.

New Campaign

File Edit View Help

Save and Close Save and New

Campaign Name: Jupiter Announcement 1

Sender Email: warrens@avidian.com

Audience Source: Add New Segment

Audience Segment 1

Name	Email	Source	DNC
Ms. Sandra Bullock	sandra@fbisfun.com	Contact	False
Susan Wayne	swayne@20thcentury.com	Contact	False
Tanya Hayden	TanyaH@soconline.com	Contact	False
Tiger Woods	tiger@pittintl.com	Contact	False
Tom Cruise	Tcruise@axe.com	Contact	False
Tom Hanks	tomhanks@thankstld.com	Contact	False
Tom Hanks	th@abc.com	Contact	False

10 Items

Cadence User

Add... Modify Remove

Recurring	Start Time	End Time
Daily	5/17/2023 12:18:00 PM	5/19/2023 12:18:00 PM

1 Items

The campaign emails will be sent at the scheduled time. You can execute it sooner if you'd like by clicking the "Execute" button highlighted below.

Prophet Campaign Manager - Outlook

File Home Send / Receive Folder View Help PROPHET Tell me what you want to do Try the new Outlook Off

Search New Email Appointment Task Reports Tools Help

View: Campaign List 2023-1 Search View

Campaign Name	Users	Sender Email	# of Audience	# of Occurrence	Updated Date	Created Date
Campaign May 3 - 1	Warren Stokes	warrens@avidian.com	12	13	5/9/2023 7:00:06 AM	5/3/2023 11:55:30 AM
Hollywood Promo 3 emails	Warren Stokes	warrens@avidian.com	40	7	5/11/2023 3:48:08 PM	11/22/2022 1:34:18 PM
Mallinator Promo 1	Warren Stokes	warrens@avidian.com	0	2	5/4/2023 6:15:23 PM	11/22/2022 1:23:22 PM
May Campaign 1	Warren Stokes	warrens@avidian.com	7	0	5/5/2023 3:45:46 PM	5/5/2023 3:45:46 PM
Test Campaign 2022-11-22 V1	Warren Stokes	warrens@avidian.com	0	2	11/22/2022 9:57:02 AM	11/22/2022 9:50:32 AM
Test Campaign 2022-11-22 V2	Warren Stokes	warrens@avidian.com	0	2	5/4/2023 3:21:19 PM	11/22/2022 9:56:07 AM
Jupiter Announcement 1	Warren Stokes	warrens@avidian.com	10	3	5/17/2023 10:16:59 AM	5/17/2023 10:16:59 AM

100 < > 1 Go 1/1 Pages 6 Records

Execute Cancel Result

Occurrence Status	Scheduled Time	Executed Time	Canceled Time	# of Recipients
Scheduled	5/17/2023 12:18:00 PM			0
Scheduled	5/18/2023 12:18:00 PM			0
Scheduled	5/19/2023 12:18:00 PM			0

3 Items

7 Campaigns (1 Selected) 3 Occurrences Connected to Prophet Server

6. Campaign Results Reporting

Once the occurrence has been executed, you can view the result by selecting the occurrence and clicking on the “Result” button highlighted below. The result window will show you how many emails have been delivered to their recipients, and how many of them have clicked on and opened an email.

Search New Email Appointment Task Reports Tools Help

View: Webinar Campaigns Search View

Drag a column here to group by this column.

Campaign Name	Users	Sender Email	# of Audience	# of Occ
New Product Announcement Summer 2023	Warren Stokes	warrens@avidian.com	33	2
Prophet CRM Training Webinar 2 July-Dec 1601 -...	Warren Stokes	warrens@avidian.com	796	1
Prophet CRM Training Webinar 2 July-Dec 801 -16...	Warren Stokes	warrens@avidian.com	796	1
Prophet CRM Training Webinar 2 July-Dec 1- 800...	Warren Stokes	warrens@avidian.com	798	1
Prophet CRM Training Webinar 2 July-Dec 2401- 3...	Warren Stokes	warrens@avidian.com	803	1
Prophet CRM Training Webinar 2 July-Dec First	Warren Stokes	warrens@avidian.com	1176	5
Prophet CRM Training Webinar 2 July-Dec NEW 1-...	Warren Stokes	warrens@avidian.com	1554	1

100 << < > >> 1 Go

Occurrence Audience

Execute Cancel Result

Occurrence Status	Scheduled Time	Executed Time	Canceled Time	# of Recipients
Executed	8/10/2023 4:45:00 AM	8/10/2023 5:30:12 AM		840

Occurrence Result

Export

Overview

Delivered	Opened	Clicked	DNC
99.87% (797)	29.20% (233)	15.29% (122)	0.75% (6)

Details

Receipt Name	Receipt Email	Status	Execution Time
798 Items			

Campaign Results can also easily be exported to Excel.

Occurrence Result

Export

Quick Report to Excel

Options

☒ Export all rows on this page ☐ Export all rows

Select the location for your Excel file

C:\Users\warrens\Documents\Avidian Technologies\Prophet\ProphetView1.xlsx

Start Cancel

Overview

Delivered	Opened
60.00% (6)	20.00% (2)

Details

Receipt Name	Receipt Email	Status	Execution Time
Susan Wayne	swayne@...	Delivered	5/17/2023 10:22:03...
Tanya Hayden	TanyaH@...	Delivered	5/17/2023 10:22:02...
Tiger Woods	tiger@...	Delivered	5/17/2023 10:22:03...
Tom Cruise	Tcruise@axe.com	Delivered	5/17/2023 10:22:03...
Tom Hanks	tomhanks@thanksttd.com	Delivered	5/17/2023 10:22:02...
Tom Hanks	th@abc.com	Delivered	5/17/2023 10:22:03...
Tony Hawk	tony@thinc.com	Delivered	5/17/2023 10:22:02...
Wayne Smithers	warrendtokens@outlook.co...	Clicked	5/17/2023 10:22:03...
Willy Wallace	warrenstokes@gmail.com	Clicked	5/17/2023 10:22:01...

10 Items

Occurrence Status	Scheduled Time	Executed Time	Canceled Time	# of Recipients
Executed	5/17/2023 12:18:00 PM	5/17/2023 10:22:04 AM		10
Scheduled	5/18/2023 12:18:00 PM			0
Scheduled	5/19/2023 12:18:00 PM			0

3 Items

7 Campaigns (1 Selected) 3 Occurrences Connected to Prophet Server

All folders are up to date. Connected to: Microsoft Exchange

Receipt Name	Receipt Email	Status	Execution Time
Susan Wayne	swayne@20thcentury.com	Delivered	5/17/2023 10:22:00 AM
Ms. Sandra Bullock	sandra@fbisfun.com	Delivered	5/17/2023 10:22:01 AM
Willy Wallace	warren.stokes@gmail.com	Clicked	5/17/2023 10:22:01 AM
Tom Hanks	tomhanks@thanksid.com	Delivered	5/17/2023 10:22:02 AM
Tony Hawk	tony@thinc.com	Delivered	5/17/2023 10:22:02 AM
Tom Cruise	Tcruise@axe.com	Delivered	5/17/2023 10:22:03 AM
Wayne Smithers	warrendstokes@outlook.com	Clicked	5/17/2023 10:22:03 AM
Tom Hanks	th@abc.com	Delivered	5/17/2023 10:22:03 AM
Tanya Hayden	TanyaH@soconline.com	Delivered	5/17/2023 10:22:04 AM
Tiger Woods	tiger@pittintl.com	Delivered	5/17/2023 10:22:04 AM

Each email has an Unsubscribe link that the recipient can click on. If they click on it, it will show a DNC status for that recipient in the Results section, and they will not receive any further emails sent through Prophet Campaign.

Prophet CRM

Campaign Manager

For Customer Service Contact:

Avidian Technologies
Customer Success
Phone: 1-855-AVIDIAN
(1-855-284-3426)
Email: customersuccess@avidian.com
Website: www.avidian.com