
Prophet Client Installation User Guide

Avidian
CRM IN OUTLOOK - RESULTS GUARANTEED

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Prophet CRM Client Installation User Guide

This guide provides information about how to use Prophet CRM Client Installer to install the Prophet CRM program.

To find information in this guide, you can:

- Select a topic from the **Bookmarks** pane of your PDF reader.
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- Use the **Table of Contents**, starting on the next page.

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1 Updated Experience

Analytics is the study, or analysis, of historical data which is used to view potential trends, evaluate performance, and make data driven decisions based on the findings of such analysis. In Prophet CRM, our Analytics Manager uses the data you have captured in the Opportunity Manager to help make sense of your pipeline, sales process, and user activity to improve your decision-making ability and give insights into process improvements.

Prophet CRM has always strived to provide the best possible experience for our clients. To achieve this in the expanding world of Data Analysis we have taken advantage of Microsoft's growing Power BI platform to bring a new and improved tool to our client base.

Power BI's use of API protocols or direct SQL connections gives fantastic flexibility for both our On Demand and On-Premise clients. At the same time, allowing for individual or company specific additions to be made to any report to fulfill all of your reporting needs.

2 Prophet OnDemand Client Install

Installing the Prophet Client

NOTE Prior to connecting a new Client to the Prophet Service, make sure that an account has been setup using the Prophet Administration website “User Management” page. A confirmation email is sent during that setup process that contains the new Client’s temporary password.

Download and Installation Instructions

Prophet Client Installation Pre-Check

To install or update your Prophet Client software you must:

1. Be using a supported operating system and Outlook version as described in Part II of this document.
2. Verify that the “C:\” drive is not compressed to check, right click the Start button, select ‘Explore’ and select the C: drive; right click and select ‘Properties’. Verify that the ‘Compress drive to save disk space’ is not checked. Prophet requires approximately 1 GB of disk space to install.
3. You must have Administrative user rights to your computer.
4. You must install Prophet while logged onto the machine with the Windows credentials of the intended Prophet user. Do not install Prophet while logged with the Administrator account unless that is the account you intend to always use Prophet with.
5. Microsoft Outlook must be pre-installed and configured with your e-mail account settings.
6. We recommend saving the Prophet Installation file to your local computer’s desktop. The installation file should not be launched from a network shared drive or a removable USB disk.

Download

1. Log on to the machine with the User Profile of the person that will be using Prophet.
2. Click on the download link sent by your Prophet CRM Admin or you can download from www.avidian.com/install/client or www.avidian.com/install/clientupdate
3. Download and save the installation file to the computer’s desktop.
4. Close all applications, including Outlook, and disable all Anti-virus software.

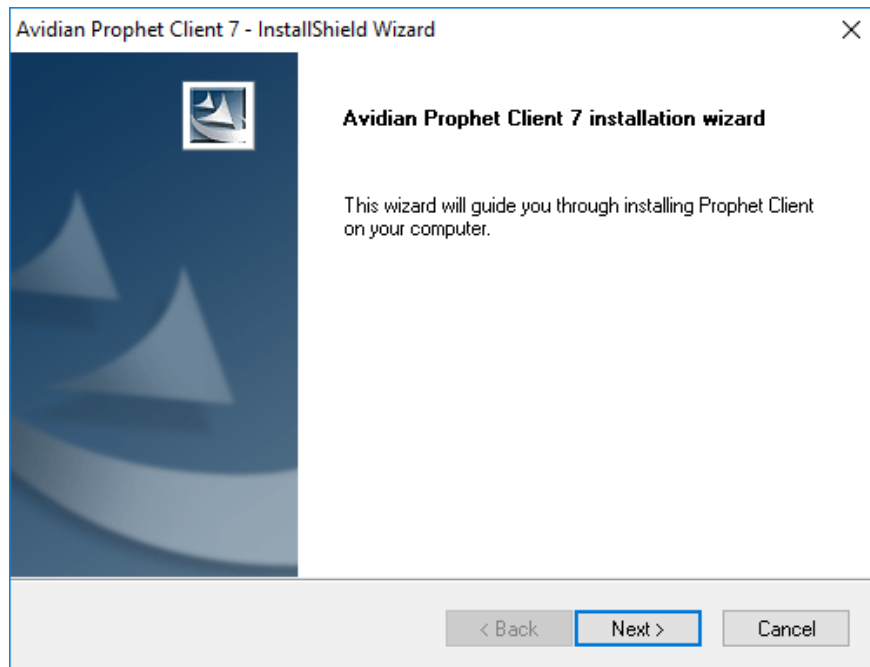
Installation

1. To begin Prophet Installation, double-click on the Prophet installation executable you just downloaded to your desktop to start the Installation Wizard.

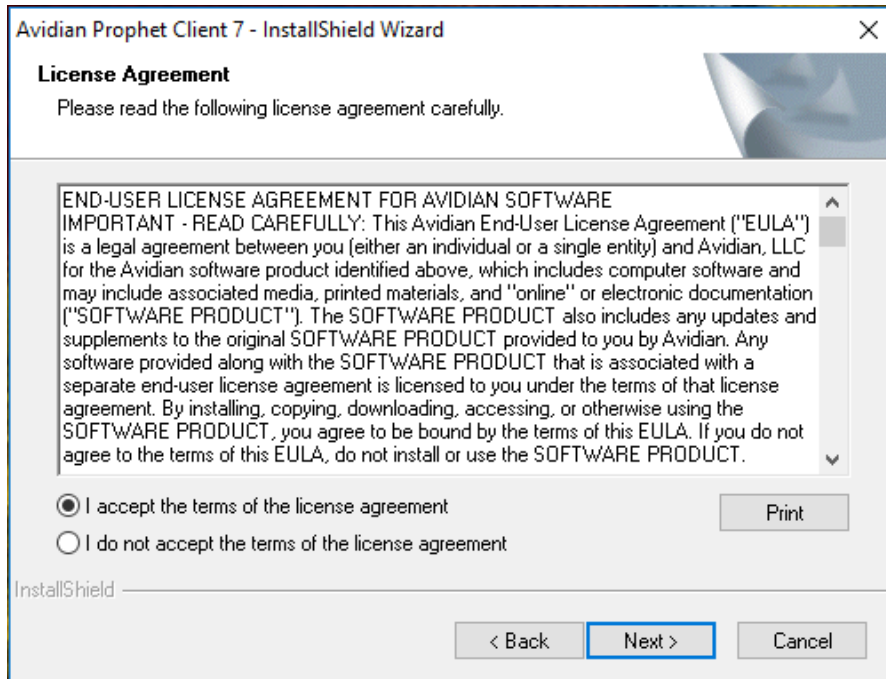
- Windows 10 Machines will display a splash screen asking for permission to run the executable. If this does not display check your menu bar for this icon:



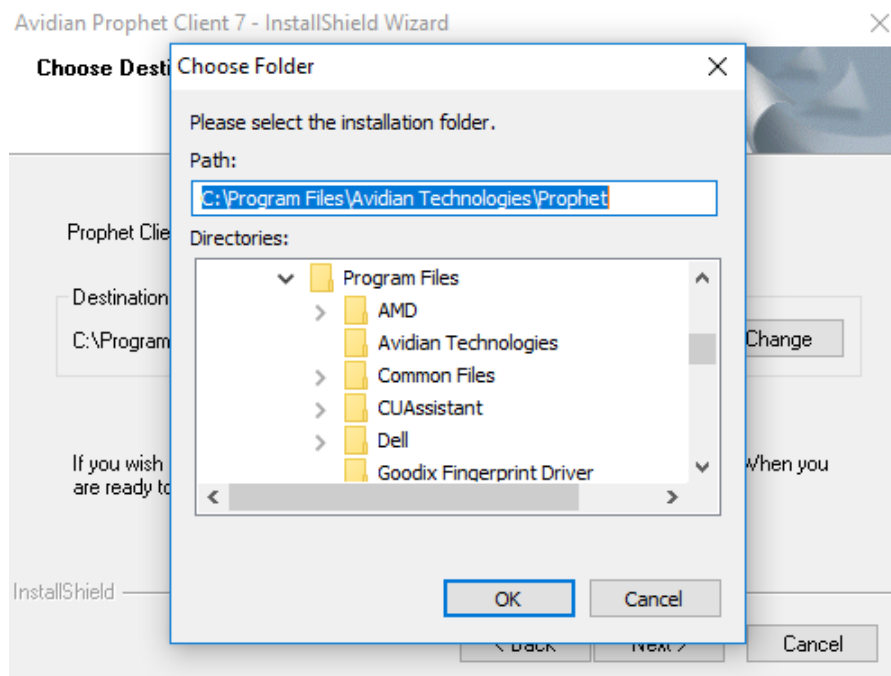
- Now the Prophet Client 7 Installation Wizard will display.



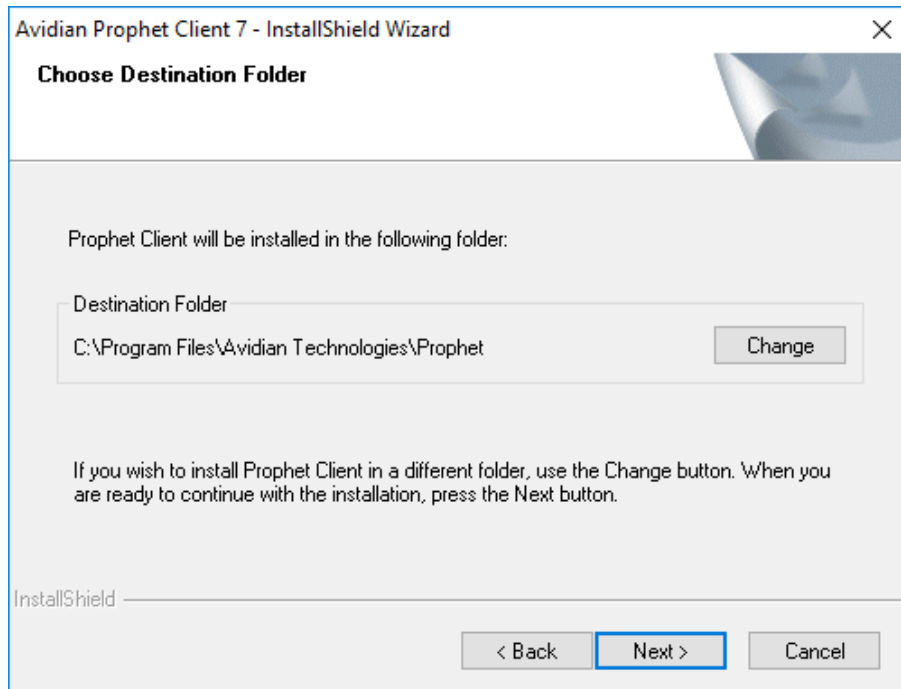
- Click **Next** to continue with installation.
- Read through the License Agreement to answer any questions about the rights and permissions of using Prophet CRM.
- When done reading select 'I accept the terms of the license agreement' and click **Next** to continue with the installation.
 - If you do not agree with the terms of the license agreement you may select **Cancel** and Prophet will not install.



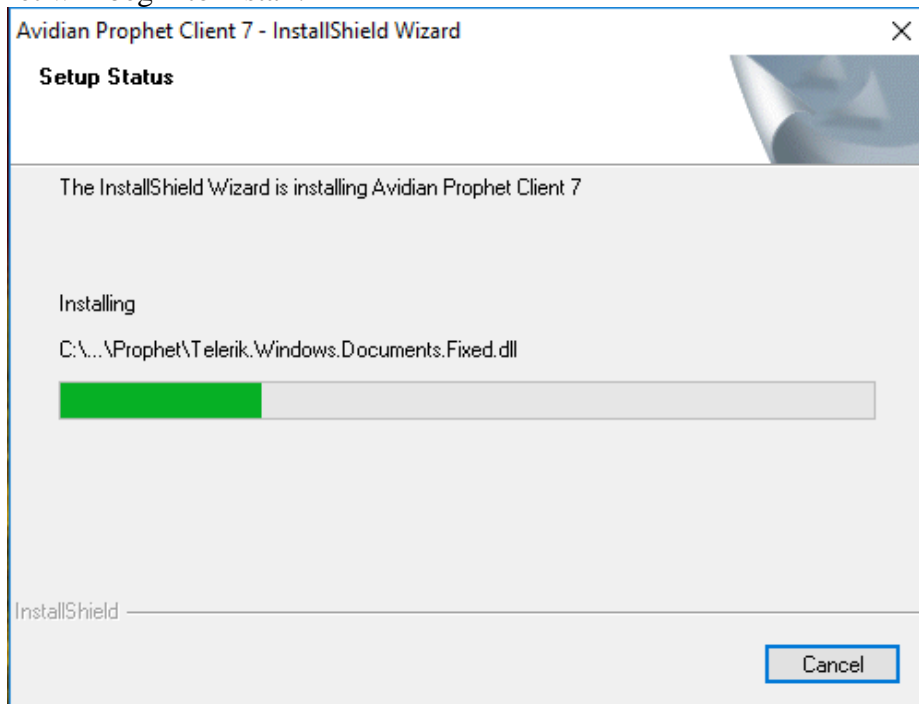
7. By default, Prophet will select the C: drive to install the Prophet application. If you will not be using the C: drive to install Prophet under select **Change**



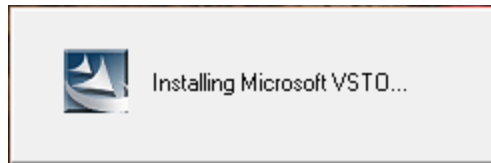
8. Select **Next** once the correct Destination Folder is displayed in the center of the window.



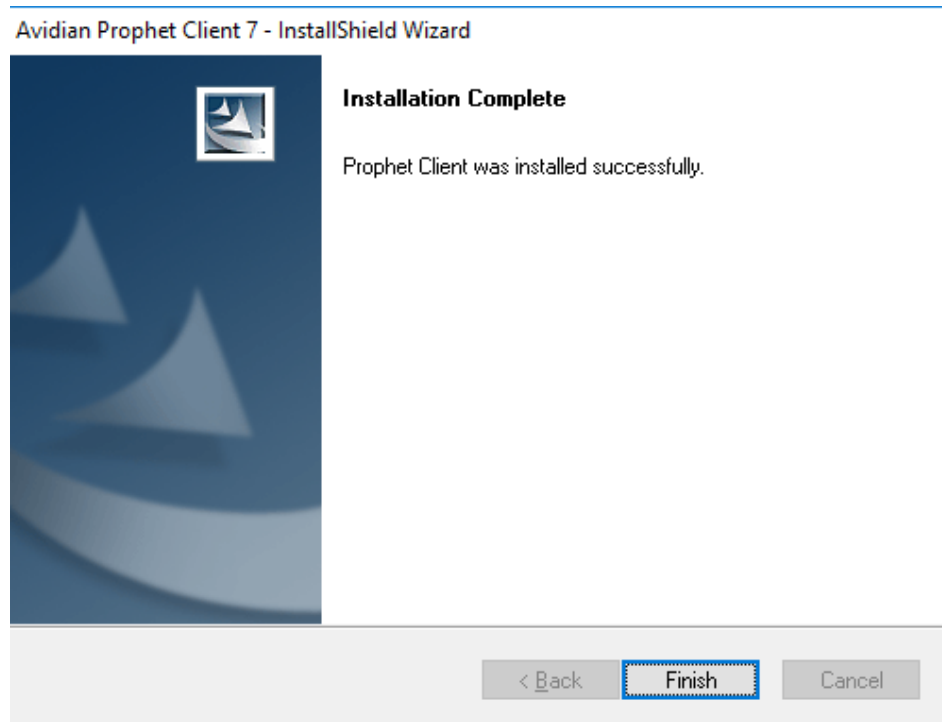
9. Prophet will begin to install.



10. Though the main window may disappear Prophet will continue to install additional items. You will see a small installation window like this.



11. Once completed with the installation, click **Finish** to continue to the Configuration of Prophet.



Configuration

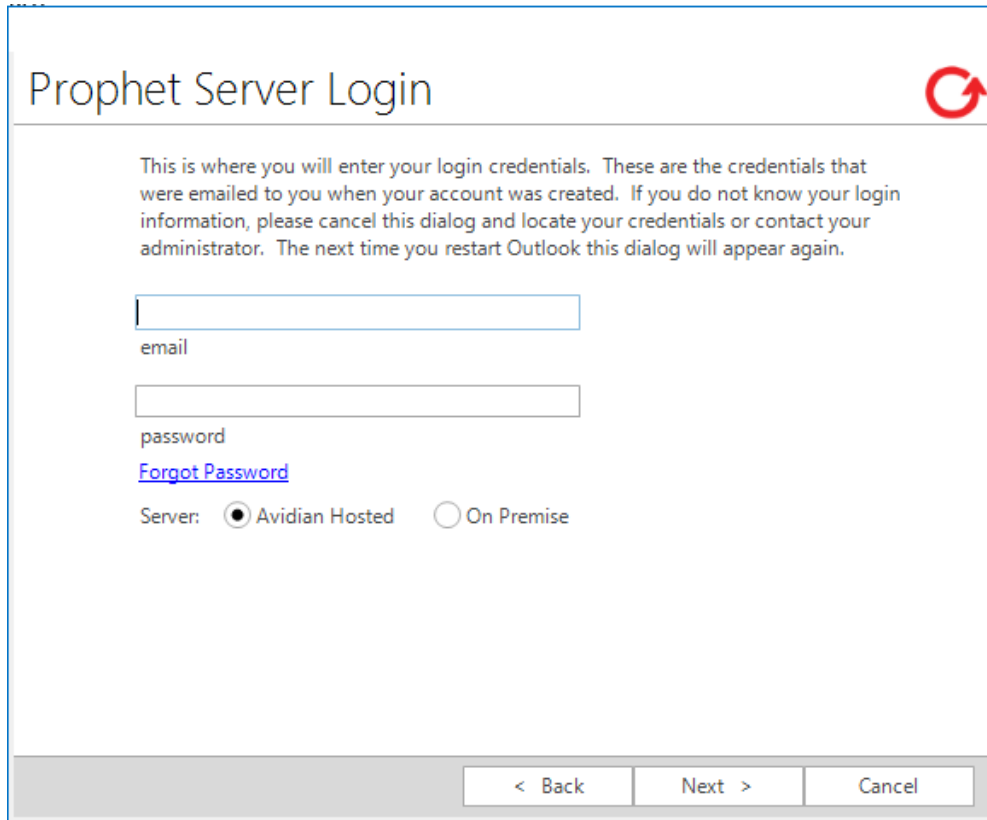
12. Upon selecting **Finish** the Installation window will close and Outlook will automatically open.



13. Click **Next** to proceed with the Prophet Configuration.
 - a. This will setup your local Prophet environment and connect it with your Prophet database.



1. You will need to specify your e-mail address, Prophet password, and if you are Prophet OnDemand or Prophet OnPremise.
 - a. You do not know your Prophet password you can select the Forgot Password link found below the Password box.



The screenshot shows a dialog box titled "Prophet Server Login" with a red refresh icon in the top right corner. The main text reads: "This is where you will enter your login credentials. These are the credentials that were emailed to you when your account was created. If you do not know your login information, please cancel this dialog and locate your credentials or contact your administrator. The next time you restart Outlook this dialog will appear again." Below this text are two input fields: the first is labeled "email" and the second is labeled "password". Under the password field is a blue hyperlink labeled "Forgot Password". At the bottom, there is a "Server:" label followed by two radio buttons: "Avidian Hosted" (which is selected) and "On Premise". At the very bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

5. Select the contact folder that you would like Prophet to retrieve contact data from by **Clicking** on Outlook Contacts and Other Folders.

Outlook Contact Folder Connection

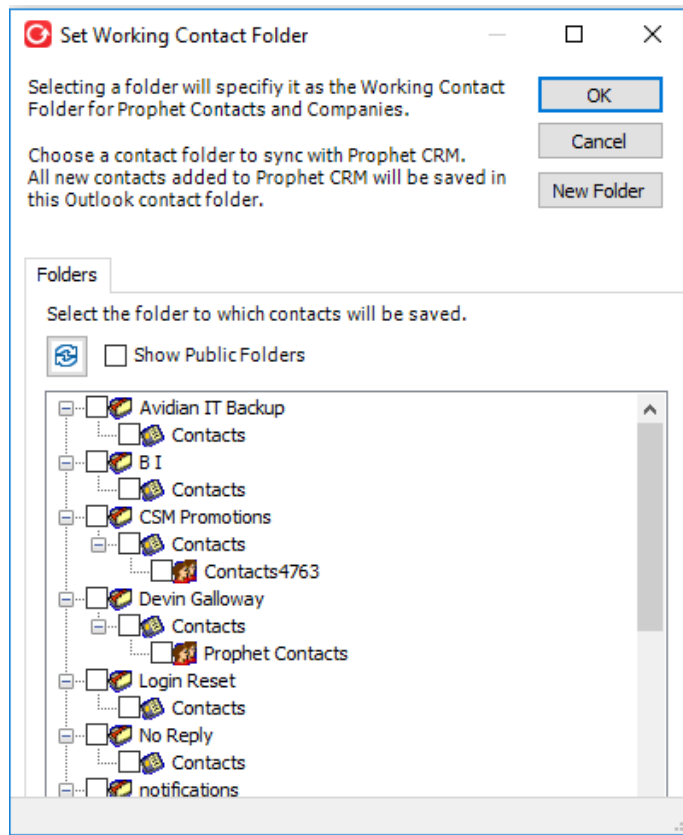
Select the Outlook contact folder you would like to connect Prophet to. This will link the contacts into Prophet. The contacts will become visible to other users in Prophet based on their permissions. All new contacts will be created by default into this folder. Also, any changes to the contacts in this folder will be reflected in Prophet.

Connect Prophet to:

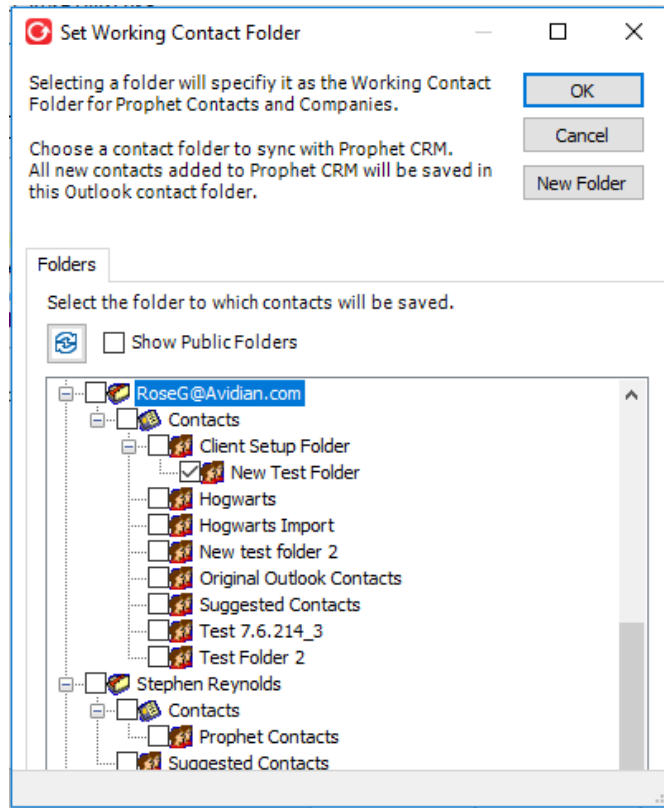
Outlook Contacts
 Other Folders

< Back Next > Cancel

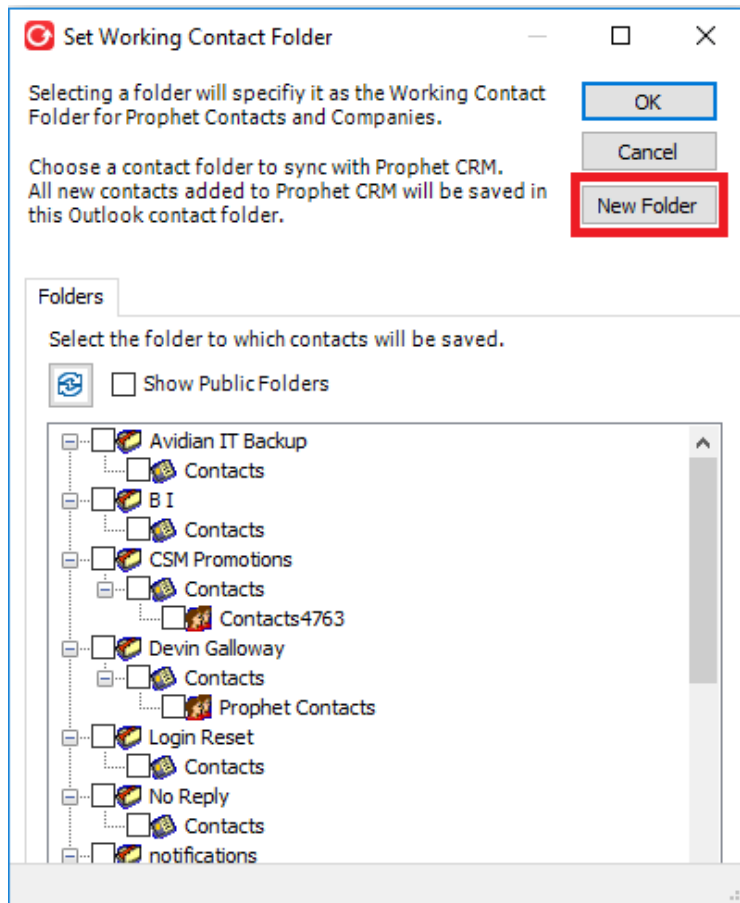
- a. If Other Folders are Selected a new window will open.



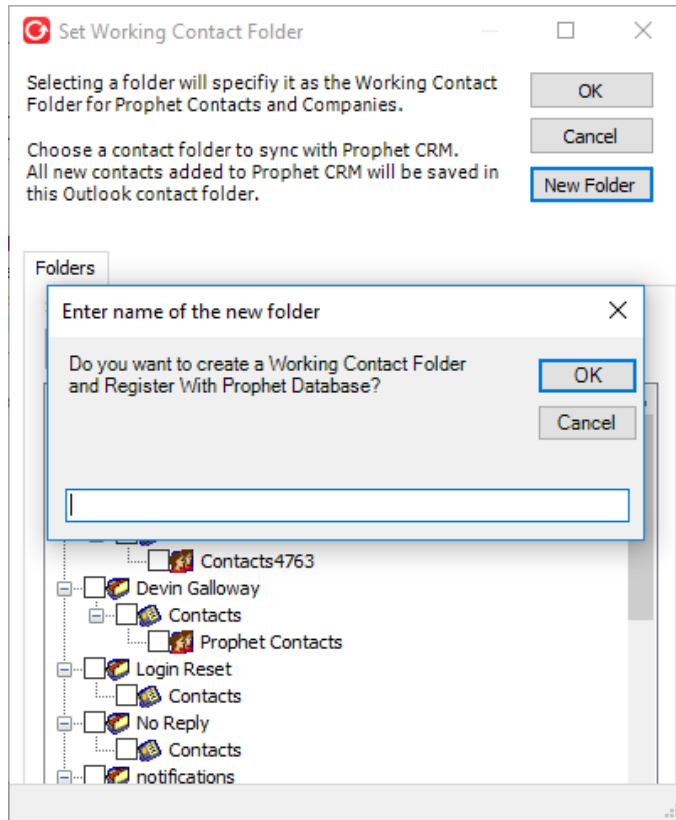
1. To Select an existing Contact Folder, scroll to the correct folder in the window, **Check** the box, and **Select** Ok.



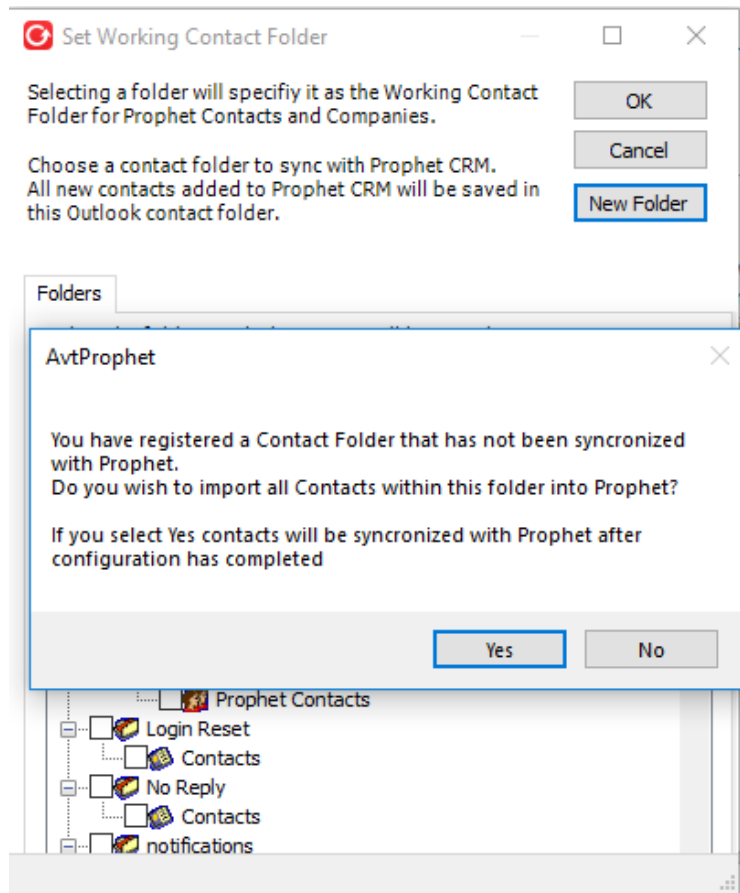
- b. To **Create** a new Contact Folder, **Click** the New Folder button at the top right of the window.



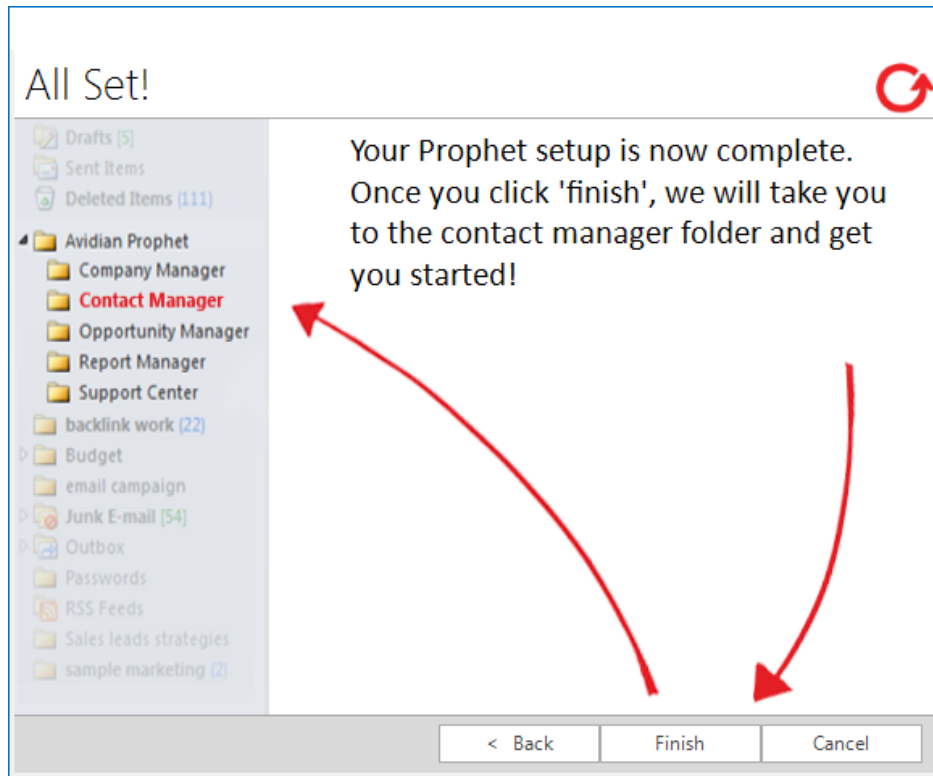
1. Enter the name of the new folder and **Click Ok**.



6. Once the Contact Folder is setup, a prompt to display to synchronize Contacts from within the Selected Contact Folder.
 1. If **Yes** is Selected all contacts will be pulled from Outlook into Prophet after Prophet's Configuration is completed and run as a background process.
 2. If **No** is Selected no contacts will be pulled from Outlook into Prophet unless they are new contacts created after Prophet is running.



7. Click the **Finish** button to complete the setup wizard.

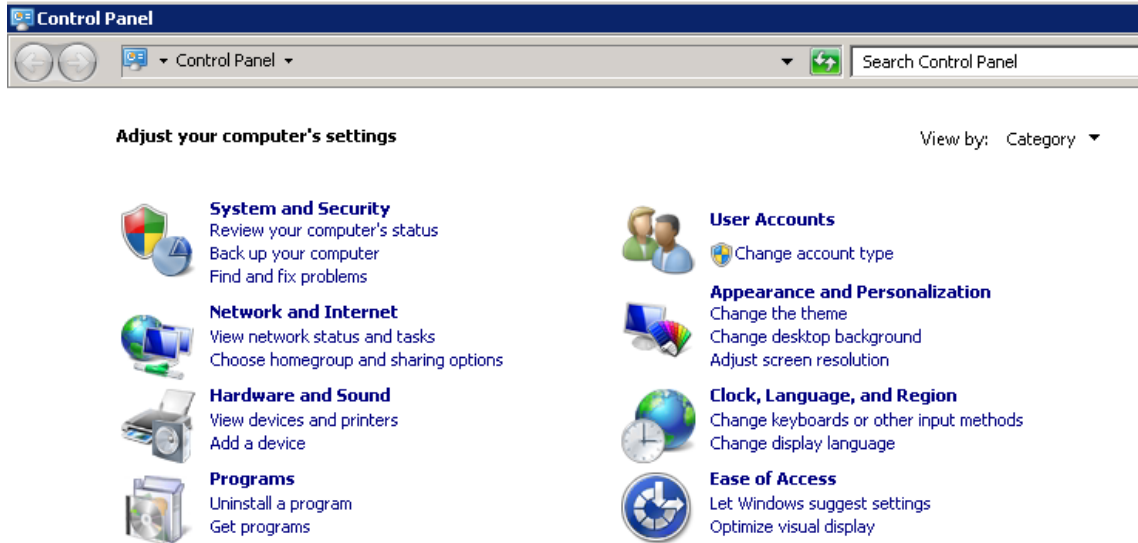


8. Prophet will automatically create Prophet Folders in your e-mail mailbox and will install a new Prophet ribbon found at the top of your Outlook after View.

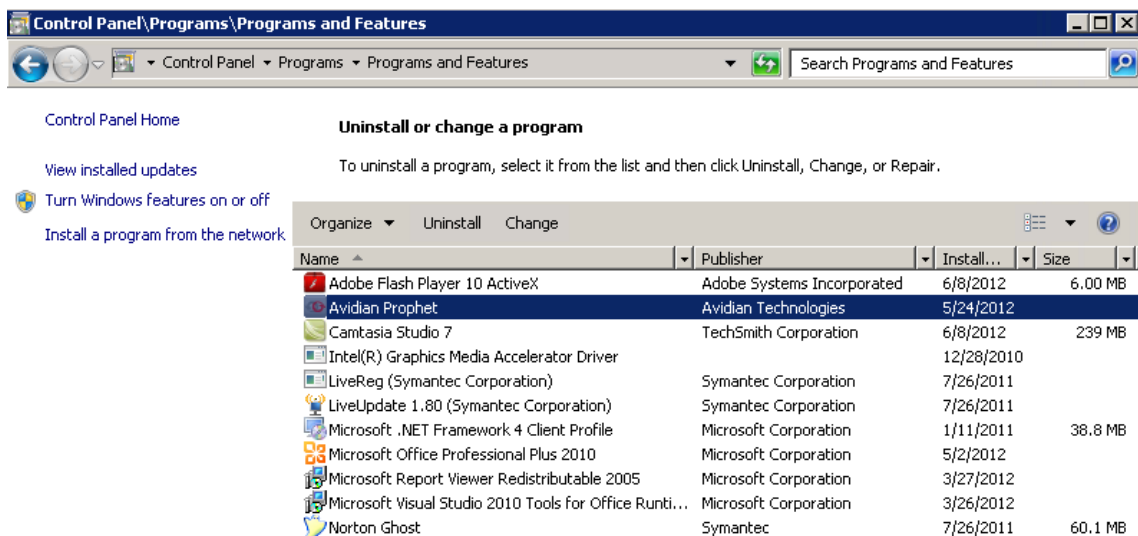
You are now ready to use Prophet! Click on a Prophet folder to begin using Prophet.

Uninstalling the Prophet CRM

1. Make sure you are logged in as the original user profile that installed it.
2. Click on the **Uninstall a Program** link in the programs section of Control Panel.



3. Select Avidian Prophet in the list of installed Programs and click the **Uninstall** button.



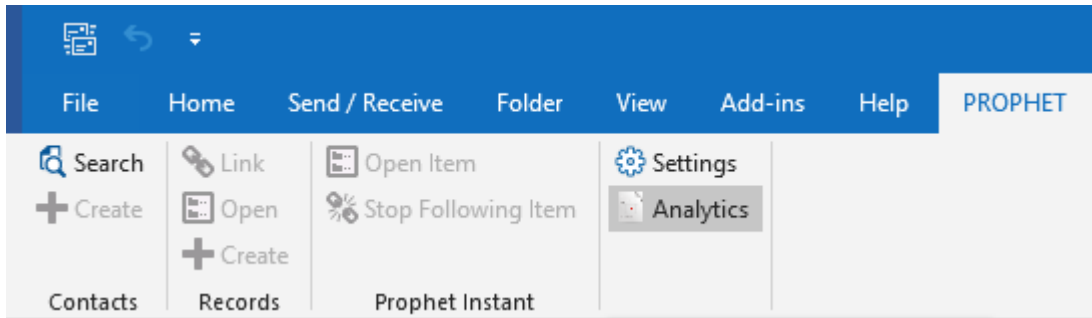
3 Prophet OnDemand Client Update

In previous versions of Prophet CRM, versions prior to 7.6.140, Analytics Manager was a separate folder found under the Avidian Prophet folder structure. In current versions of Prophet CRM Analytics can be found within the Prophet Ribbon and runs as an independent application outside of Outlook. This allows for simultaneous processing of Outlook functions, Prophet

Managers, and Analytics. Additionally, the Analytics Pane can continue to operate even once Outlook has been closed.

Open Analytics Pane

To access the Analytics Manager, select the Prophet ribbon found at the top of your Outlook. Click on Analytics to launch the Analytics Pane.



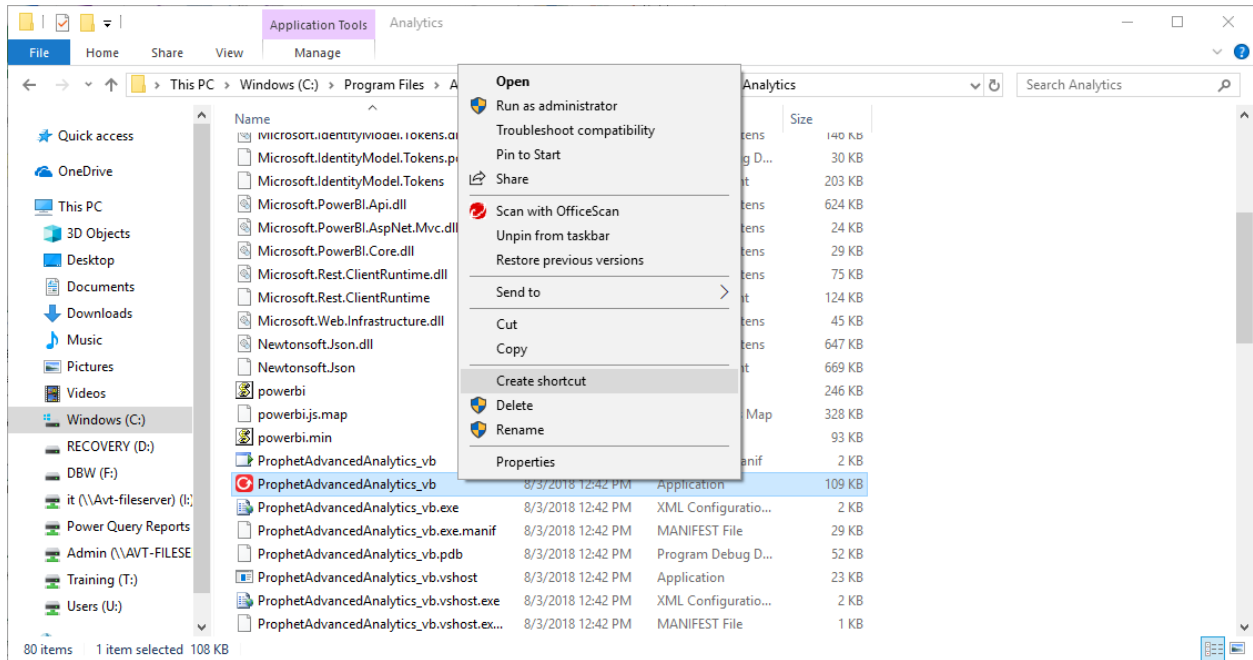
You may also create and save a shortcut key to the application and launch the application from the shortcut key without Outlook being opened.

To create and save a shortcut key to your Taskbar:

- 1) With the Analytics Pane open right click on the icon in the Taskbar and select Pin to Taskbar.



- 2) Open a File Explorer and navigate to C:\Program Files\Avidian Technologies\Prophet\Reports\Analytics and select ProphetAdvancedAnalytics_vb.exe. Right click on this item and select Create Shortcut.



Select Reports

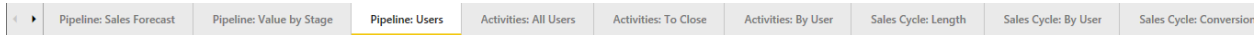
From the bottom of the Analytics Pane you can select any of the twelve analytics reports. Each report is titled with the area of information covered within the report followed by the title of the report itself (example: Pipeline: Sales Pipeline).

4 Prophet OnPremise Client Install

All twelve Analytics Reports have the similar layouts with few deviations. This standardized layout allows for easy navigation.

Viewing Reports

All twelve standard reports can be found at the bottom of the Analytics Pane. Each report's name has the following format: Area of Reporting: Name of Report. There are two arrows found on the far-left side of the Pane to shift accordingly to the left or right to see all twelve reports.



Filters

Filters for each report can be found on the left side of the Analytics Pane. The top four filters are found on each report. However, additional filters are specific to the type of report being viewed.

All filters are page level filters and will alter the data for that page. Filters cannot be selected to hold their value across all reports.

Date Range

Department

Sales

Users

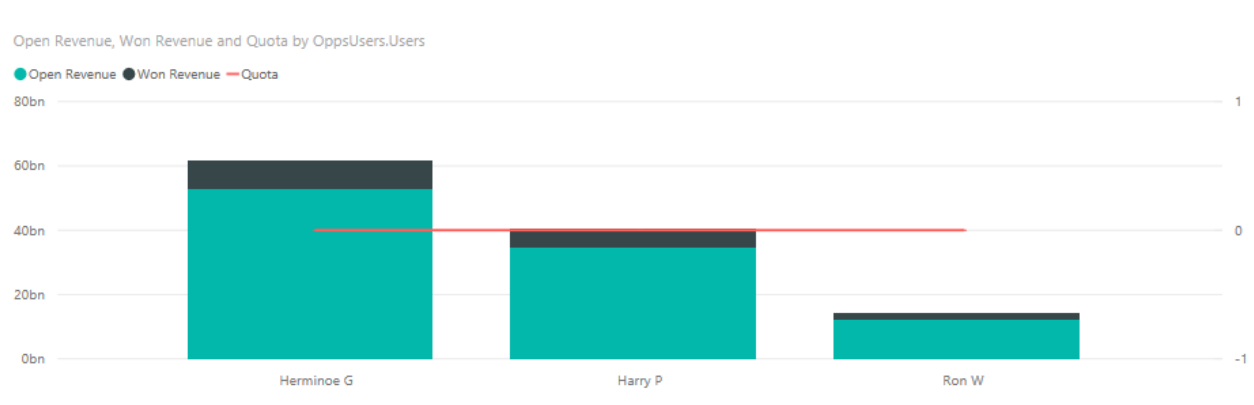
Harry P
 Herminoe G
 Ron W

Company Name

(Blank)
 &Barr
 1 Exam Prep
 10-8 Evs
 111 Web Studio
 12: Eleven Production Equipment
 123
 123Rf
 18 Week Support
 1958
 1977

Visual

Each report contains one or more visuals that render the data in a graphical way to provide easy to see trends or patterns. These visuals will be in the form of a line graph or bar graph.



Table

Table data can be found directly under the Visual and is used to support and explain the information being seen in the visual. Formatted in a similar way as the grid layout of Prophet's Opportunity Manager data can be sorted alpha-numerically in ascending or descending order. Column weight can be changed to show more details. However, column width cannot be saved in this fashion.

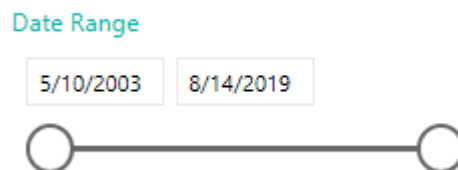
Users	Revenue	Won Revenue	Open Revenue
Harry P	11,242,328.40	6,000,491,714.35	34,537,417,436.90
Hermoine G	17,698,933.79	9,141,762,952.83	52,617,835,044.42
Ron W	4,222,495.23	2,101,554,701.80	12,096,054,033.20
Total	33,163,757.42	17,243,809,368.98	99,251,306,514.52

5 Prophet OnPremise Client Update

Filters can be selected on the far-left side of the report. Each filter will manipulate only the data found on that report page and will not carry over into other reports.

Date Range

Starting with the Date Range at the top left side this filter has both custom start and end dates as well as a slicer that can be dragged across the horizontal line to select data from the first record recorded in Prophet to the most recently updated record.



Department

Department is used by Enterprise level clients to separate data and templates across multiple sections of business. When not selected all data, from all departments, is viewed together to give

a full view of business development. To see a specific department's information, click on the box to the left of the department's name.

- Department
- Sales

Users

User filters information at an individual level within each report. A single person or multiple persons can be selected at any time.

- Users
- Harry P
 - Herminoe G
 - Ron W

Company Name

Company Name refines data on the report to display all information about a specific company wither they have a single Opportunity record or multiple records.

- Company Name
- (Blank)
 - 10-8 Evs
 - 18 Week Support
 - 1St Capital Bank
 - 1St Financial Bank Usa

Status

Status can be found on Pipeline reports and allows you to filter on active, won, and lost opportunities to determine incoming revenue, gained revenue, and lost revenue.

- Status
- 00 - Not Qualified
 - 01 - Active
 - 02 - Long Sales Cycle
 - 03 - Won
 - 04 - Lost

Tracking Type

Tracking type can be found on Activity reports and filters activity counts by type providing insights into productivity.

- Tracking Type
- Activity

Stage

Stage can be found on Stage reports allowing users to filter reports based on specific stages in the sales process.

- Stage
- 01 Lead
 - 02 Qualifying
 - 03 Evaluation
 - 04 Product Demo

