



Quick Start Guide

- **Inputting contacts in Outlook® and Prophet®**
- **Creating company accounts**
- **Creating a sales opportunity**
- **Sending a group personalized email**
- **Generating a report**



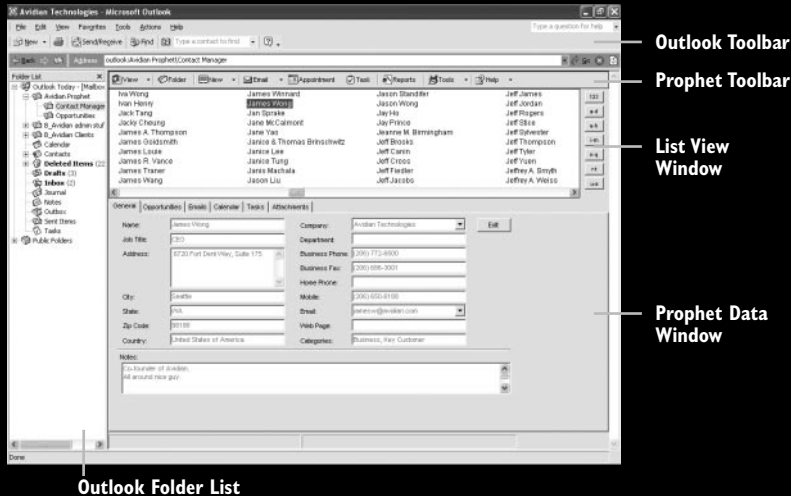
DEVELOPED BY:
Avidian Technologies™

The 5 minutes you spend reading this guide will save you hours on getting started successfully managing your contacts and sales opportunities.

1. Inputting Contacts in Outlook® and Prophet™

The Contact Manager

The Prophet Contact Manager is the central dashboard for managing contact and company accounts in Prophet. It also serves as the launching pad for personalized group emails, the sales opportunity window, tasks, appointments, reporting and customization. It is divided into three main sections:



Quick Tips:

1. Use the View drop-down on the Prophet Toolbar to see Contacts, Company Accounts, Contacts with Opportunities or Company Accounts with Opportunities in the List View Window.
2. “Right Click” power – Using your mouse to right click on contacts, company accounts, opportunities and most everything else is a great shortcut for getting things done in Prophet. Try it everywhere and let us know where we’ve missed an opportunity to make Prophet easier to us by sending an email to info@avidian.com.

Adding Contacts and Creating Company Accounts

The beauty of Prophet is its total integration with Outlook. With Prophet, you continue to work with Outlook the way you always have including the way you add contacts. Prophet gives you new ways to add contacts that works with Outlook and gives you the ability to create a company account relationship that is not possible in Outlook.

Adding a New Contact with Prophet

1. Click on the drop-down arrow next to the “New” button on the Prophet Toolbar
2. Select new contact
3. Add contact information
4. Click save and close

2. Creating Company Accounts

1. Click on the drop-down arrow next to New on the Prophet Toolbar
2. Select new company
3. Add the general company account information
4. Click on the “add” button in the Company Contacts section and add any contact regardless of which company they currently work for
5. Click the account reps tab and add the reps from your contact list that are assigned to this company account.
6. Click save and close button on the company account toolbar

Quick Tips:

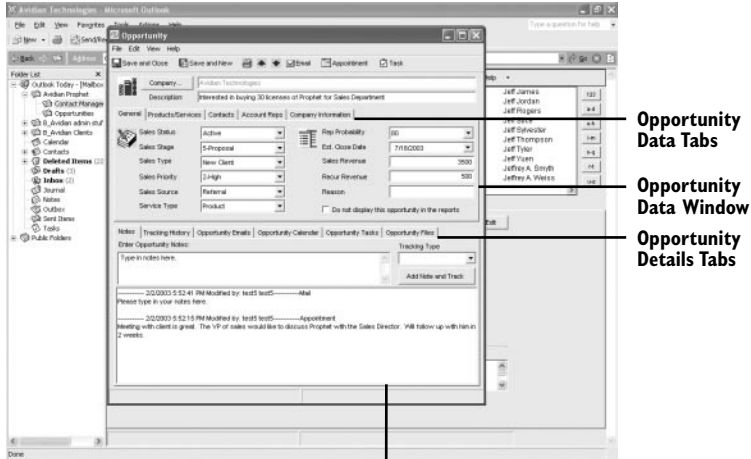
1. Once you have a contact or company account in your contact list – right click on that person/organization to add a new opportunity, task, email, group email or appointment. So easy!
2. Entering your account reps and any other employees that work with accounts into Prophet as contacts will make opportunity set-up much more efficient.
3. Company Accounts are useful when you want to assign an opportunity to a business unit instead of a company, i.e. John works for GE but GE Financial Services is more appropriate as an Account.

3. Creating a Sales Opportunity

The easiest way to create a sales opportunity is to right click on the contact or company account in the list view window and select New Opportunity. For more methods of adding sales opportunities, please see the “Prophet User Guide”.

The Sales Opportunity Window

All of the elements of a sales opportunity can be managed from here including the details and stage of the opportunity itself and the tracking of notes, meetings, emails and activities associated with the opportunity.



Opportunity Data Tabs

Opportunity Data Window

Opportunity Details Tabs

Opportunity Details Window

Quick Tip:

If you create an email, appointment or task from inside the sales opportunity window, it will automatically be connected to that opportunity and easily found using the Opportunity Details Tabs.

4. Sending a Group Personalized Email

Send a Personalized Group Email using Prophet

The personalized group email wizard creates a unique email with the same body text for each contact you select with a salutation and use of the person's first, last or both names without CC'ing or BCC'ing the rest of the people on the distribution list. Here's how:

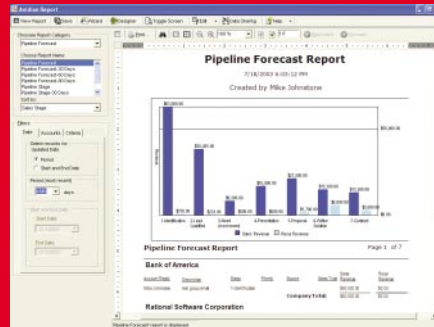
1. Select the contacts, distribution list, company accounts or category of contacts that you want to include on the email.
2. Highlight all of contacts while holding down the Shift or Control key.
3. Click on the drop-down button next to Email on the Prophet Toolbar then select Group Email.
4. If you want to add or edit list, click edit change the email recipients > click next
5. Insert the subject line and either the message or browse for a saved message. The saved message can be in one of the following formats: .txt, .rtf or .doc > click next
6. Select a salutation and personalization option, add any attachments > click next
7. Preview and send!

5. Generating a Report

Prophet 2004 comes with over 30 standard reports that can be saved in six formats (Excel, Word, PDF, HTML, TIFF and TXT). Once you have opportunity data captured, do the following steps to create your first report:

Standard reports are created by doing the following from the Contact Manager:

1. Click on the Reports button on the Prophet Toolbar
2. Select the standard report you are interested in seeing in the Choose Report Category drop-down box.
3. Select the report you want in the Choose Report Name box.
4. Select the column you wish to sort the report by in the sort column drop-down box.
5. Select the filters you wish to apply in the filters box including date range or last X days, which account reps, company accounts, contacts and/or revenue parameters.
6. Click on View Report in the Report Toolbar
7. When you are happy with the report, click on "Save" button and select the format you would like to save the report in: PDF, HTML, TXT, XLS, RTF or TIF.



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