

Release Date: 2-June-2015

Prophet Version: 7.2

Components Updated in this Release: Prophet Client, Prophet Server

Upgrade Process:

Existing Prophet OnDemand (POD) clients will automatically be prompted to upgrade when Outlook is opened after the 1st of each month when a new update is available. To update these clients immediately, launch the updater manually from the Prophet Help Menu. Prophet OnPremise (POP) customers with an active service contract can download the Server and Client updaters from avidian.com in order to upgrade to version 7.2.

Major additions in this release:

Prophet API. This feature opens up Prophet CRM data fields to RESTful based web services that are built on the open data (OData www.odata.org) standard for communicating to and from cloud-based data stores. This enables developers to access this data for a myriad of use cases, such as data export via Microsoft Power Query for Excel, or passing data from a website to Prophet CRM. The Prophet API can be enabled for both OnDemand and OnPremise installations.

Documentation is available [here](#).

Prophet Import. Prophet Import has greatly improved the scope of data fields that can be imported, and provides excellent control over how that data is merged with existing Prophet CRM data. It can be used to regularly update existing Prophet CRM data on demand using External IDs. This addition replaces the legacy Prophet CRM Import Engine.

Documentation is available [here](#).

Prophet External ID. External IDs are now definable values during a Prophet Import process, to ensure the migration and integration of external data is traceable. This is key in maintaining relationships with external systems over time. External ID's are preserved in Prophet CRM and the values can be used as lookup keys for later data imports.

Prophet User Interface (UI) Refresh. The Prophet UI now matches Microsoft Outlook UI, to simplify the user interaction with Prophet CRM in Outlook.

Prophet Created and Modified Dates. All Primary Item Types (e.g. contacts, companies, and opportunities) can be displayed with created and modified dates in columns within the respective grid view.

Enhancements:

The following enhancements and bug fixes are included within this release.

Connection Session Management.

- Improvements were made to the robustness of how a Prophet CRM client connects to the Prophet CRM server.
- Error messages were improved to explain what a user should do when login fails due to configuration issues vs an actual failed login.

Contact Folder Sync Experience Redesign.

- When a contact folder synchronizes with Prophet CRM, there is now a progress dialog box, with a progress bar, to show status with the synchronization.
- A synchronization is now capable of being cancelled while still in process.
- The synchronization can now occur in the background during the use of other Outlook features.

Specific Bug Fixes

| BUG# | DESCRIPTION |
|------|--|
| 1873 | The page numbers in the mobile web pages no longer show erroneous pagination (e.g. "1-25 of (blank)"). |
| 2072 | Clicking export to Excel from view managers now uses the new .xlsx format. |
| 2567 | The Auto-link email subject is no longer visible in mobile web page notes. |
| 2633 | Resolved a problem where an Outlook <i>public folder</i> that is set as a <i>working-contact folder</i> becomes temporarily considered a local folder. The problem only existed until the first time Outlook is restarted. This caused problems in which the contact a user creates inadvertently gets assigned to another user. |
| 2638 | Auto-link notes no longer display within the edit/delete notes dialog box of the Opportunity form. |
| 2663 | Fixed the company report, within the report wizard, that includes both a Tracking/Note date and a Company Note to not generate duplicate rows for the same note. |
| 2697 | Export to Excel no longer breaks when UNICODE characters are included in the data set to be exported. |
| 2735 | The opportunity tracking type is no longer recorded as "activity" (default value) when the selected tracking type of the Opportunity form has less than 3 characters. |
| 2749 | Different formats of the same phone number resulted in different numbers in the de-duplication logic for managing an import (fix logic was applied to new import functionality). |
| 2784 | The opportunity form now enables user defined text fields to include a multi-line text field configuration. |
| 2832 | Entry of more than 500 characters into the mobile web page note field is now enabled. |
| 2850 | The Sales Automation Workflow template now processes even when no subject line is included in the template creation. |
| 3005 | The opportunity form revenue field now supports up to four (4) decimals (e.g. 1.001). |
| 3897 | When filtering by user in the report manager the filtered user boxes are now checked accurately. |
| 3950 | All customized product fields are editable on mobile web pages. |
| 3965 | Editing an opportunity now does not set blank estimated closed dates to the current date, within mobile web pages. |
| 4055 | When inline filtering of records, the Opportunity Modified Date Time now returns through the end of the day when specifying a range. Formerly, date ranges set to less than or equal to a date would not include the specified date, only up to that date. |