Release Date: 1-Feb-2017
Prophet CRM Version: 7.5
Components Updated in this Release: Prophet Client, Prophet Server

Upgrade Process:

Existing Prophet OnDemand clients will automatically be prompted to update when Outlook is opened after the 1st of each month following the availability of a new update. If you wish to update immediately, launch "Check for Updates" from the Prophet "Help" menu.

Prophet OnPremise customers with an active service contract should contact support to schedule a time to update their server and clients.

Release Overview

This release presents what is new in Avidian Prophet CRM Application 7.5. Included in this release are specific improvements and bug fixes.

What's new in this version?
- Constant Contact integration
- Prophet Dashboard
- Enhancements

Overview

Constant Contact

Constant Contact integration allows Prophet to communicate bi-directionally with Constant Contact online marketing software.

Users can export Prophet contacts to Constant Contact by selecting a list of contacts which they wish to communicate with, as well as configuring types of feedback which will update information within Prophet corresponding to specific fields (ex. Clicks a link, Unsubscribes etc.). The data will be updated in Prophet based on what actions the contacts take in Constant Contact's campaigns' emails.

Dashboard

The dashboard displays insights related to contact and opportunity data; including opportunity revenue, sales stage, and top accounts, as well as number of contacts created or updated and contact activity.

You can access the new dashboard going to Prophet Today folder (Avidian Prophet folder).

Enhancements

In Prophet 7.5 the following enhancements were added:

- **Change revenue format -** Change to the revenue and reoccurring revenue field in opportunities and grid view to display fields as monetary numbers with appropriate notations including commas and dollar signs.
- **Change email search within opportunity -** Change email sort within Opportunity under Email Tab to show most recent (descending) emails and remember last number entered for emails to retrieve.
- **Ability to save expanded view within Companies and Opportunities –** In prior versions of Prophet the ability to expand the company and opportunity records to show more or less of the fields located at the top of the screen would reset each time a company or opportunity record was opened.

  In Prophet 7.5, once the company or opportunity record is expanded to the desired height and the record is saved it will open to that height each time going forward.
- **Ability to change file name for quote files –** While generating quotes you are able to change the name and location of the generated file.
- **Import tool, remove case sensitivity for dropdowns and eliminate trailing spaces** - In import tool, remove case sensitivity for dropdowns and any other fields, automatically eliminate trailing spaces.
- **Spellcheck in Prophet -** Desktop only. The option to turn on or off spell check will be available. This will impact Opportunity description and all note fields.
- **Custom Reports Headings –** Added report headers for custom reports.
- **Additional quote file formats -** Quote files can now be saved in the following additional formats: xlsx, xslm, doc, docx