

Prophet Version: 7.0.570

Release Date: April 22, 2014

New Features:

Prophet Analytics provides a dynamic data visualization of a sales pipeline and forecasts, trending performance, funnels and more, all of which are filterable by a wide range of selection criteria. It comes packaged with 14 interactive analytics charts that will help you report and analyze your business. The charts are available within the Analytics Manager folder, now located within your Prophet 7 CRM folder structure in Outlook.

Prophet Analytics is currently only available for customers hosting Prophet CRM data via Avidian. We expect to have a similar offering for our OnPremise customers hosting their own data in the near future.

Avidian offers the following products and services for customer with custom report needs beyond Prophet Analytics standard reports:

- Prophet Analytics Pro enables you to create your own custom reports based on your specific business reporting requirements.
- Avidian professional services will create custom reports per your specifications and add them to your standard report library (no upgrade to Prophet Analytics Pro required).
- If you are interested in either of these two options, contact accountmanagement@avidian.com for pricing.

Company Merge enables a Prophet CRM client to merge duplicate company records. To merge duplicate companies, enter Company Manager, highlight the duplicate companies, right click on one of the records and select Merge Companies from the context menu that appears. A dialog box will appear where you can configure the merge settings and confirm the merge.

Import and Export of Prophet Templates now enables simple distribution and installation of custom templates between Prophet Servers via the Prophet 7 client.

Enhancements:

The following enhancements are included within this release.

Offline Opportunity Notes that are created within a Prophet CRM client while “offline” will now synchronize to the Prophet Server when that client goes “online”.

Administrative Website Session Notification: An administrator will now see login dialog displayed when the session times out after 155 minutes.

Mobile views now display the proper user name.

Enhancements (cont'd):

Date fields in Opportunities: When the date fields from custom opportunity tabs are exported the format will be a date field (vs a text field).

Company data import behavior: The “Import Company, Contact and/or Opportunity Data” feature previously overwrote company information and “deleted” related Company data. If the Company name was included as part of the import, any data for that Company currently saved in Prophet would have been overwritten with blank data. Prophet CRM 7 will not inadvertently “overwrite” previously saved Company data, and the following rules will manage new imports:

- If a Company name does NOT exist in Prophet, then a new Company will be created through the import and populated with any other related Company related data that was included in the import.
- If the Company name ALREADY exists in Prophet, then the company name will only be used in reference to the imported Contact and/or Opportunity. This enables a client to manually configure the proper contact-company and opportunity-company relationships. Note: the Company name MUST be an exact match (case insensitive).

How to Upgrade:

Who can upgrade	Download Link
Existing customers with Prophet CRM 6 clients, who want to upgrade to Prophet CRM 7.	Existing Prophet CRM 6 Client Upgrade: http://www.avidian.com/install/clientUpdate
Existing customers with Prophet CRM 6 server, who wish to upgrade Prophet CRM 7. New customers who wish to install Prophet CRM 7 Server for the first time.	Existing Prophet CRM 6 Server Upgrade: http://www.avidian.com/install/server
Note: Prophet CRM 6 – OnPremise customers should upgrade both the client and server upgrades at the same time.	