

CRM (Customer Relationship Management) should not just be for your sales team, it should encompass your entire organization. The Centerprism CRM module offers contact management tools beyond sales & marketing management by extending this functionality to other business areas such as: Field Service, Shipping, Warehouse, Customer Service, A/R Collection and Purchasing & Vendor management. More importantly, Centerprism's CRM is the only full-featured CRM that is fully integrated to the ERP system. This is accomplished WITHOUT any data migration or configuration. Finally, PrismView technology is leveraged so that managers can see a 360 degree view of customer, employee, or vendor activity which shows every touch from each team member of every department. As a result, you have a complete picture of all types of activity in one place. Communication will be more unified and decision-making more collaborative leading to the better management of your organization.



## Beyond Sales

Centerprism's CRM goes beyond most other CRM applications by providing the ability to create notes and activities for contacts associated with other modules, such as Shipping, Field Service, or A/R Collections. All client communication is stored in one database giving management the ability to see how different departments, such as Order Fulfillment, Customer Service, or Collections. This collaboration allows teams to work together towards customer satisfaction rather than participate in counter-productive activities such as continuing to selling to clients with past due payment issues.

- **Modules tied to CRM:** Sales, Order Entry, CRM, Field Service, A/R Collections, Purchasing, and Administration and PrismView™.
- **Contact Record Groups:** Customers, Prospects, Vendors, Employees, and Collectors.
- **Team Member Roles connected:** Salespeople, Sales Managers, Customer Service Reps, Technicians, Collectors, Buyers, Project Managers, and HR Managers.
- **Vendor & Purchasing Management:** Use CRM to archive vendor contact conversations, create reminders tied to POs and track shipments, or create evaluation activities.
- **Contact Classes:** Organize Record Groups to create specific classes within the group.
- **Field Service Management** includes equipment, service plans, Work Orders, Maintenance schedules, and Service Call Ticketing.



## Built-In ERP Integration

**Same Day Plug n' Play:** Centerprism provides the only out-of-the box CRM application that is fully integrated to the ERP. This means CRM functionality provides access to quotes, orders, invoices, customer, vendor, and inventory records as well as financials. NO data migration and NO complex configuration is necessary. **CRM is fully functional as soon as it's turned on!**

**Single Database.** Centerprism's CRM stores all records in one database. No more separate databases for Order Entry, Sales, Field Service, and A/R Collection notes and/or activities. Data silos create bottlenecks which cause customer service and productivity issues.

- **Same Day Implementation.**
- **Customers are assigned contacts** which can be re-assigned.
- **Note & Activity Creation ability from different sources:** Order Entry, Work Orders, Services calls, or other modules.
- **Combine Tasks by Team Member.**
- **Vendors are assigned contacts:** notes and activities then become date and time stamped just like customer contacts.
- **ERP back up includes CRM:** includes all notes, activities, reminders, attachments, images, etc. are backed up.



## Full Pipeline Management

Centerprism's CRM provides the ability to track an opportunity from acquisition to sales order. This is accomplished using a variety of status tracking tools including Sales Stage, Value, Percentage to Close, and Projected Date. Multiple notes and activities can be tied to an Opportunity and assigned to a salesperson and customer. Team sales efforts are better supported because activities and notes can be created from other modules and assigned to an opportunity. A set of configuration tools is provided to customize opportunity creation, the follow-up process, and success management.

- **Notes, Activities, and Opportunities** are tracked by contact record.
- **Multiple Contacts can be assigned to a single Prospect, Customer or Vendor record.**
- **Prospect to Customer Conversion Tool** - will retain contact history and automatically joins to other customer records in Sales and A/R batches.
- **Note/Activity Types:** Phone, Meeting, Email, Service Call, Task, Reminder, and Contact Profile.
- **Notes created from Activities:** The note 'Type' is auto aligned with the activity 'Type' and each integrated note is tagged with an ICON.
- **Sales 'Stage' Audit history with reason code.**
- **Unlimited Attachments/Images to Activities.**
- **Integration to Microsoft Outlook** - Email log to track emails **SENT** from OE, CRM, or Field Service.



## 360 Degree View

Managers now have a complete view of all notes, activities, service calls, meetings, and opportunities from one screen. PrismView™ provides a superior Excel-like views where columns on a grid can quickly and easily be grouped or filtered. Additionally, a calculation tool provides analytical values by group. Performance indicators will help you improve productivity and profits.

- **Global View or Activities & Opportunities.**
- **Group or Filter Activities/Notes by Module and Activity Type** (phone, meeting, email, etc).
- **Roles-based security** can limit visibility at the module and/or functional level.
- **Sales, Technician, and Executive Dashboards** with dispatch.
- **Employee Activity Log** tracks and organizes TASKS and REMINDERS by team member and by module source.

*According to Forbes Magazine, a CRM system is one of the most valuable tools that any small business can implement. Having a salesforce is not enough. To succeed, CRM must be an integral part of a sales operation.*

## About Centerprism

Centerprism delivers a low cost, fully integrated software application dedicated to reducing Enterprise Resource Planning (ERP) complexities for small to mid-sized businesses. This all-in-one product replaces multiple software solutions often cobbled together to accomplish the same business objectives.

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