



**COMMENCE CRM**

**EXTENDED PROFILE**



## OVERVIEW

Commence CRM is a sales, marketing and project management CRM designed for small to mid-sized organizations.

The Commence CRM sales management features allow professionals to monitor sales activity, manage leads and improve sales forecast accuracy, whilst marketing features include campaign management, budget optimization, and web-based lead forms. Customer service functionality is also offered, through ticket management and RMAs, as well as a knowledge base and an FAQ feature.

Away from sales and marketing, there is also a project management tool within Commence CRM. This allows for the management of tasks, files, resources, and expenses. There is also the option for real-time collaboration through the platform, where there is access to all your data for the efficiency of discussion about projects. There is also the option of a customer portal, email integration, QuickBooks integration, as well account and contact management.

Commence CRM is available on-premise or in the cloud, with pricing for both options based on an annual SaaS model. There are three levels of support available: self-service; email and telephone support and professional services support. This final level of support is customized to the needs of each business. This could include data migration; instructional training; third party integration or implementation of best practice.



## SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Commence CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✓

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✓
<b>SUPPLEMENTARY FEATURES</b>	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
<b>CUSTOMER SIZE</b>	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✗
ENTERPRISE (201+ USERS)	✗
<b>OTHER FEATURES</b>	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
<b>MOBILE FEATURES</b>	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✗
<b>HOSTING METHOD</b>	

CLOUD	✓
ON-PREMISE	✓
<b>FURTHER INFORMATION</b>	
PRICING	\$29 - \$65 per user/month
IMPLEMENTATION TIMEFRAME	1-2 days

## SOFTWARE SCREENSHOTS

### Today's Calendar

**Activities** [Add New](#)

No scheduled activities today.

[More...](#)

**Lead Activities** [Add New](#)

No scheduled lead activities today.

[More...](#)

### Pending Opportunities

[Add New](#)

No outstanding opportunities due today or prior to today.

[More...](#)

### My Sales Performance

Year to Date ▾



Segment	Color	Value Range
Red	Red	\$0 - \$50K
Orange	Orange	\$50K - \$150K
Green	Green	\$150K - \$200K

Needle position: \$35K

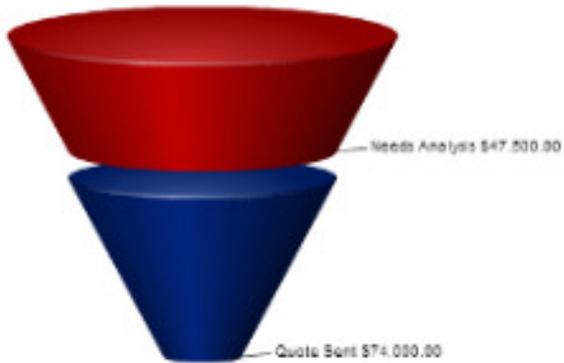
### New Leads

[Add New](#)

You have 17 new leads

[More...](#)

### Pipeline by Stage



Stage	Value
Needs Analysis	\$47,000.00
Quote Sent	\$74,000.00

### My Favorite Reports

[Add New](#)

30 Day Forecast

Weekly Activity Report

[More...](#)

Commenge CRM Welcome back, Bill

Home Accounts Calendar Activities Sales Leads Documents Analytics

Accounts

Contacts

Teams

Marketing Program

Accounts

Quick Links

All	Company	Primary Contact	Phone	Email	Street	City	State	Account Manager	Rating	Source	Industry
	Alabama Machinery & Supply Co.	Alexander, Nancy	661-349-5855 EXT 2246	office@alabamamachinery.com	2200 Jericho Turnpike	Huntington	New York	Strobe, Bill	★★★★★	Email Marketing	Manufacturing
	Cardine Corporation	Arelio, Chris	732-380-9100	webapp@commence.com	2 Industrial Way West	Edison	New Jersey	Commence, CRM Admin	★★★★★	Referral	Technology
	Broder Supply Company	Broder, Eric	732-380-9100	info@broder.com	200 Tomlin Way	Tristram Falls	New Jersey	Strobe, Bill	★★★★★	Referral	Manufacturing
	Broder Supply Company	Broder, Eric	732-380-9100	info@broder.com	115 Walnut St	Brookhaven	Mississippi	Strobe, Bill	★★★★★	Trade Show	Construction
	Webster Truck Co.	Heet, Ward	498-1200	vwheel@car.com	168 Dartmouth Ct.	Virginia Beach	Virginia	Reed, Nicole	★★★★★	Cold Call	Transportation
	Webster Truck Co.	Dovidi, Mark	281-932-1933	markd@websteertrucks.com	P.O. Box 96262	Houston	Texas	Reed, Nicole	★★★★★	Email Marketing	Manufacturing
	Mobile Tool Supply Inc.	Lund, Wayne	405-409-7245	wlund@mtool.com	100 Concord Place #204	Copper River	West Virginia	Reed, Nicole	★★★★★	Cold Call	Business Services
	CSI	O'Toole, P. William	205-533-3305	wil@csi.com	2925 old rocky ridge	Birmingham	Alabama	Strobe, Bill	★★★★★	Email Marketing	Consulting
	Midwest Finance Inc	Bremer, Wayne	813-240-2555	wayne@midwest.com	6817 Compass Point Way	Tampa	Florida	Coburn, Tom	★★★★★	Web Site	Financial Services

Alabama Machinery & Supply Co., Inc. - Google Chrome

nextgen.commerceonline.com/commence/contacts/view\_entity.do?rowid=14

Accounts: Alabama Machinery & Supply Co. Inc.

Account: Alabama Machinery & Supply Co. Inc.

Address: 2200 Jericho Turnpike, Huntington, New York

Revenue: \$6 Million

Employees: 200

Account Qualification: Cold 1 2 3 4 5

Related Info: Alabama Machinery & Supply Co. Inc.

All	Name	Job Title	Accounts	Phone	Work Phone	Email	Date Modified
	Alexander, Nancy	Vice President	Alabama Machinery & Supply Co. Inc.	661-349-5855 EXT 2246		office@alabamamachinery.com	Jan 26, 2016 07:59:53 PM
	Brady, Tom	Sales Rep	Alabama Machinery & Supply Co. Inc.	661-349-5855		tbrady@alabamamachinery.com	Jan 06, 2016 05:15:15 PM
	Carethy, Larry	Sr Sales Rep	Alabama Machinery & Supply Co. Inc.	661-349-5855		lcarethy@alabamamachinery.com	Jan 25, 2016 11:20:37 AM
	Strobe, Bill	Owner	Alabama Machinery & Supply Co. Inc.	661-349-5855		bill@alabamamachinery.com	Jan 25, 2016 11:20:37 AM

New Contact - Google Chrome

nextgen.commerceonline.com/commence/contacts/new\_individual.do?entityName=Newco&entityName=Newco

First Name: New

Last Name: New

Job Title: Sales Rep

Account: New

Reports To: New

Address: New

State: New

Postal Code: New

Country: New

Source: New

Contact Methods: New

Decision Maker: New

Hobbies: New

Related Info: Newco

All	Name	Job Title	Accounts	Phone	Work Phone	Email	Date Modified
	Smith, Mike	VP Sales	Newco	732-380-1000		mike@newco.com	Feb 03, 2016 04:05:07 PM
	Reed, Nicole	VP Sales	Newco	732-380-1000		nreed@newco.com	Feb 03, 2016 04:05:07 PM
	Reed, Nicole	VP Sales	Newco	732-380-1000		nreed@newco.com	Feb 03, 2016 04:05:07 PM
	O'Toole, P. William	VP Sales	Newco	205-533-3305		wil@newco.com	Feb 03, 2016 04:05:07 PM

Commenge CRM Welcome back, Bill

Home Accounts Calendar Activities Sales Leads Documents Analytics

Accounts

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Teams

Marketing Program

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Quick Links

All	Name	Accounts	Phone	Email	Fax	Source
	Alexander, Nancy	Alabama Machinery & Supply Co. Inc.	661-349-5855 EXT 2246	office@alabamamachinery.com	661-456-7895	
	Allard, Christian	Sika Safety Inc.	440-779-3300	call@csika.com		
	Arelio, Chris	Cardine Corporation	732-380-9100	cardine@commence.com	732-380-9170	
	Baker, Bob	Dunell Corporation	718-329-2995	bbaker@dunell.com		
	Brady, Tom	Alabama Machinery & Supply Co. Inc.	661-349-5855	tbrady@alabamamachinery.com	661-456-7895	
	Bremer, Wayne	Midwest Finance Inc.	813-240-2555	wayne@midwest.com		
	Broder, Eric	Broder Supply Company	340-613-2200	erobroder@broder.com		
	Carethy, Larry	NextGen		marketing@commence.com		
	Carethy, Larry	Alabama Machinery & Supply Co. Inc.	661-349-5855	lcarethy@alabamamachinery.com	661-456-7895	
	Catch, Diana	DCV Capital	908-277-3900	dianac@dcv.com		
	Chapman, Dean	Alin Grups, Strauss, Heuer	214-969-2800	dchapman@algrump.com		
	Commence, CRM Admin	NextGen		webapp@commence.com		
	Dovidi, Mark	Webster Truck Co.	661-439-1010	markd@websteertrucks.com		
	Edberg, Jeff	Webster Truck Co.	732-380-9100	edberg@websteertrucks.com	732-380-9170	
	Edberg, Jeff	Webster Truck Co.	732-330-7100	jeff@websteertrucks.com	732-330-7170	
	Gibson, Colleen	Alin Grups, Strauss, Heuer	214-969-2800	cgibson@algrump.com		
	Gibson, Tom	NextGen	609-442-8309	marketing@commence.com		
	Granham, John	Alin Grups, Strauss, Heuer	214-969-2800	jgranham@algrump.com		
	Johnson, Tom	Alabama Machinery & Supply Co. Inc.	661-349-5855	tjohnson@alabamamachinery.com		
	Jones, Bob	Alabama Machinery & Supply Co. Inc.	661-349-5855 EXT 2246		661-456-7895	