

CRM (Contact Relationship Management)

SmartSimple enables your foundation to easily track and manage relationships with the people who are most important to the success of your organization. These could include donors, grantees, foundation staff, subject matter experts and other stakeholders.

The screenshot displays two overlapping views from the SmartSimple CRM. The top view is 'View Contact - Debra McCleary', showing a profile for Ms. Debra McCleary, Grant/Contracts Specialist at Brooklyn Community Outreach. It includes contact information, a photo, and a table of activities. The bottom view is 'View Organization - Brooklyn Community Outreach', showing details for the organization, including its address, contact information, and a table of activities.

View Contact - Debra McCleary

Profile: Ms. Debra McCleary
Grant/Contracts Specialist
Brooklyn Community Outreach
1743 86th St. At Bay 17th St.
Brooklyn, New York, United States, 11214
Address Book
(718) 236-4086
applicant@smartsimple.org

Other Activities: Site Visit, Email

#	Type	Reviewer	Status	Date
1	Offline Site Visit	Gary Modlin	Submitted	08/22/2013
2	Offline Site Visit	Gary Modlin	Submitted	08/21/2013

View Organization - Brooklyn Community Outreach

Main | Coding | Organization Documents | Tax

Brooklyn Community Outreach
www.brooklyncommunityoutreach.com

1743 86th St. At Bay 17th St.
Brooklyn, New York, United States, 11214
Address Book
Tel: (718) 236-4086
Fax: (718) 236-4084
Primary Contact: Debra McCleary
Parent Organization: » Organizations - US Based

Subject	Type	Start date	End date
Discuss Reporting	WebEx	September 06 2013 9:00AM	September 06 2013 9:00AM
Grant	Conference Call	August 12 2013 9:00AM	August 12 2013 9:00AM
Grant	Conference Call	August 12 2013 9:00AM	August 12 2013 9:00AM
Discuss	Meeting	August 01 2013 9:00AM	August 01 2013 9:00AM
Report Due	Phone Call	July 31 2013 9:00AM	July 31 2013 9:00AM

Contacts

- Contacts are core to the system.
- Each contact is associated with one or more client-defined roles.
- Any information can be captured by creating custom fields specific to the role(s) of the contact.
- All contacts are users – provided you activate their access.
- Once a contact logs into the system, they are provided with an interface defined by their role(s).
- Each contact is associated with one or more organizational entity.

Organizations

- Any number of organizations exist in an infinite hierarchy.
- Any number of contacts can be attached to a single organization.
- Any information can be captured by creating custom fields specific to the category of the organization.

Activities

- Activities represent engagements of any type with contacts and organizations.
- Simple examples are phone calls, meetings, conference calls, etc.
- Activities can take place in the context of a specific engagement such as a grant application or directly with the contact or organization.
- Many types of activities are supported and each can have unique attributes, workflows and processes.
- Any number of contacts can be associated with a single activity.
- Activities are workflow-enabled but also support simple reminder and follow capability.