

# PRISM ERP

## Sales & Marketing Module

10

Core Modules

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ISO Standards

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Best Practices

An end-to-end sales and marketing management platform covering customer relationships, quotation-to-cash workflows, pricing, delivery, and invoicing — built to ISO 9001 and IFRS 15 standards with GDPR-aligned data protection. This document provides a comprehensive specification of all modules, operational best practices, ISO compliance clauses, and technical architecture layers.

### LEAD-TO-CASH LIFECYCLE

Lead	Opportunity	Quotation	Sales Order	Delivery (GDN)	Invoice	Statement
Capture & track lead source	Qualify prospect	Generate SQ w/ pricing	Convert to SO w/ credit check	Post GDN to inventory	VAT-compliant tax invoice	AR aging & payment history

### CORE FUNCTIONALITY — 10 MODULES

#### Customer Master

Centralized repository for customer profiles, credit limits, and interaction history.

#### Lead & Opportunity Management

CRM pipeline tracking from initial contact to qualified prospect.

#### Sales Quotation (SQ)

Rapid generation of professional quotes with revision history and status tracking.

#### Sales Order (SO) Processing

Conversion of approved quotes into formal orders with automated approval gates.

#### Price List Management

Configurable pricing tiers, seasonal discounts, and customer-specific contract rates.

#### Goods Delivery Note (GDN)

Systematic recording of shipments with direct integration into Inventory and Logistics.

#### Sales Invoicing

Generation of VAT-compliant tax invoices linked to delivery records or service contracts.

#### Credit Note Tracking

Formal processing of sales returns and fiscal adjustments for financial accuracy.

#### Customer Statements

Real-time ledger visibility for outstanding balances, aging analysis, and payment history.

#### Marketing Analytics

Reporting on lead sources and conversion rates to measure marketing campaign ROI.

## OPERATIONAL BEST PRACTICES

### 01 Lead-to-Cash Automation

Eliminate manual re-entry by enforcing the conversion flow from Quotation -> Order -> Delivery -> Invoice.

### 02 Proactive Credit Management

Utilize the 'Credit Limit' field in the Customer Master to automatically flag high-risk orders at the 'SO Entry' stage.

### 03 Unified Price Lists

Discourage ad-hoc discounting; use system-managed Price Lists to maintain margin consistency across the sales team.

### 04 CRM Integrity

Require 'Lead Source' tracking for all new prospects to identify which marketing efforts are generating the highest quality revenue.

### 05 Real-time Delivery Sync

Post GDNs immediately upon shipment to ensure the Sales team has live visibility into order fulfillment status.

### 06 Professional Communication

Use system-generated templates for SQs and Invoices to maintain a consistent and professional brand identity.

### 07 Regular Aging Review

Utilize the Customer Statement reports for weekly accounts receivable reviews to maintain healthy cash flow.

## ISO STANDARDS COMPLIANCE

### ISO 9001:2015

#### Requirements for Products and Services

Requirements Review — SQ and SO approval workflows ensure customer requirements are defined and reviewed before commitment.

Customer Communication — Integrated contact management within the Customer Master facilitates Clause 8.2.1 compliance.

### IFRS 15

#### Revenue from Contracts with Customers

Revenue Recognition — Strict linkage between Performance Obligations (GDN) and Invoicing (AR) ensures compliant financial timing.

### GDPR / Data Protection

#### Customer Data Privacy

Secure Data Storage — Granular access controls on the Customer Master ensure sensitive client data is handled according to global privacy standards.

## TECHNICAL ARCHITECTURE LAYERS

### CRM

#### Lead & Opportunity Engine

Pipeline tracking from initial contact through qualification, with mandatory Lead Source attribution.

### QUOTING

#### SQ & Price List Engine

Revision-tracked quotations driven by configurable Price Lists, tiers, and contract rates.

### ORDERS

#### Customer & SO Processing

Centralized Customer Master with credit limits feeding automated SO approval gates.

### FULFILLMENT

#### Delivery & Inventory Sync

GDN issuance posts shipments directly into Inventory and Logistics in real time.

### FINANCE

#### Invoicing & AR

VAT-compliant invoicing, credit note adjustments, and customer statement aging analysis.

### ANALYTICS

#### Marketing & Compliance

Lead-source ROI reporting alongside ISO 9001, IFRS 15, and GDPR-aligned controls.