

Terms & Conditions

Overview

The Customer and Prospect Management System (CPMS) is a SharePoint Framework (SPFx) solution designed to streamline and digitize sales and relationship management for small to mid-sized organizations. Built entirely within Microsoft 365, CPMS ensures secure handling of prospect and customer data while improving visibility and operational efficiency.

Data Collection

CPMS may collect and store the following data:

- Prospect details (name, company, contact information, notes, and deal stage)
- Customer information (organization details, ongoing projects, communication logs)
- Interaction records (emails, meetings, follow-up notes)
- Usage activity (record creation, updates, conversions)

All information is securely stored within your organization's Microsoft 365 tenant using SharePoint Online lists and libraries.

Data Usage

- The collected data is used exclusively to:
- Manage and track prospects and customers
- Enable seamless conversion from prospects to customers
- Generate reports and visual dashboards for business insights
- Maintain accurate records for relationship management
- We do not share, sell, or distribute user or customer data to third parties.

Data Security

CPMS leverages Microsoft 365's enterprise-grade security, compliance, and access control mechanisms. All data remains within your tenant environment, ensuring complete data ownership and adherence to your organization's privacy and compliance policies.

User Consent

By using CPMS, users consent to the collection and processing of data as outlined in this policy. Users should ensure that any data entered into the system complies with their organization's data governance standards.

Third-Party Services

CPMS operates entirely within Microsoft 365 and may use Microsoft Power Automate for workflow automation. No external third-party data services are used outside the Microsoft ecosystem.

Changes to This Policy

This Privacy Policy may be updated periodically to reflect product improvements or compliance updates. Changes will be communicated via the Microsoft Partner Center listing or through your organization's administrator.

Acceptance of Terms

By installing and using the Customer and Prospect Management System (CPMS), you agree to this Privacy Policy. If you do not agree with these terms, please discontinue use of the application.

License

CPMS is licensed for use within your Microsoft 365 tenant. Redistribution, resale, or modification outside your organization is prohibited without prior written permission.

Usage Guidelines

- CPMS must be used in accordance with your organization's internal data handling and privacy policies.
- Users are responsible for the accuracy and integrity of the data they enter.
- Access permissions should be managed according to organizational policy.

Availability

While CPMS is designed for high reliability, we do not guarantee uninterrupted service. We are not liable for downtime, data loss, or delays caused by network or Microsoft 365 infrastructure issues.

For questions, reach us at info@jmsadvisory.in.