# PlanetOne CRM

## Features

⇒ *Flexible and configurable structures*

⇒ *Share sales data across individuals and teams*

⇒ *Focus attention on the most profitable deals*

⇒ *Bring new sales representatives up to speed*

⇒ *Monitor business performance*

⇒ *Create and execute campaigns across marketing channels*

⇒ *Captures leads directly into CRM System*

⇒ *Measures return on investment of campaigns*

⇒ *Centrally manage and share all customer service issues*

⇒ *Understand frequency of incidents to improve product quality*

⇒ *Share information across individuals and teams*

⇒ *Measure the responsiveness of customer support*

⇒ *Create real-time reports and dashboards on any CRM metric*

⇒ *Monitor the effectiveness of marketing programs, sales opportunities, and support cases*

⇒ *Share/restrict access to reports and dashboards across teams*

⇒ *Manage schedules, calls, meetings and emails from a single location*

⇒ *Create, assign and manage key projects across teams*

### General Information

The system seamlessly blends all of the functionality required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks.

### Dashboard Function

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

### Calendar Function

We use the Calendar module to view and to create activities such as appointments, calls, meetings, and tasks. You may view your calendar by day, week, month, or year. In each format, any planned activities with associated dates are displayed – such as Calls, Meetings, Tasks, Notes and Emails.

### Activity Function

An activity can be any interaction with colleagues and customers such as phone call, a meeting, or an email. The Activities module can be used to schedule and manage calls, meetings, and tasks.

## Contact Management Function

You may associate a contact that is any individual who is a valid sales lead with any record such as an account, opportunity, or campaign. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.

## Campaigns Management Function

We use the Campaigns Module to track and manage mass marketing campaigns.  First, you will begin with identifying the targets. You may create a campaign using the Campaign Classic option or the Campaign Wizard option. When you use the Campaign Classic option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings. When you use the Campaign Wizard, it guides you through the process of creating the campaign as well as completing related tasks.
The Campaigns module provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaign.
You can create the many types of marketing campaigns such as Email, Newsletter, Mail, Web, Radio, Television, Print, and Telesales.
When you create a campaign such as Mail and Radio, you are creating a record in PlanetOne CRM for your reference. However, you cannot execute the campaign through PlanetOne CRM.
When you create an Email campaign or a Newsletter campaign, you can create it through PlanetOne CRM.

## Leads Management Function

Leads are early contacts in the sales process. After they have been evaluated and assessed, you can convert them into contacts, opportunities, and accounts. You may also associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

## Opportunity Management Function

Every opportunity must be associated with an account. An opportunity specifies the estimated sales amount for an account and is tied to a sales stage. A sales stage, such as Qualification, Closed Won, or Closed Lost identifies how close you are to making a sale. We, as the administrator, can define and set the sales stage depending upon the requirements in our organization.
Based on the sales stage, the system calculates the probability of a sale. For example, at the Proposal sales stage, the system calculates the probability as 80%, and at the Negotiation sales stage, probability increases to 95%.

## Project Management Function

You may add a project and assign to a responsible user. For example, if you are going to have a trade show setup, you can define multiple project tasks for each project.

## Cases Function

You may use the Cases module to track and manage problems with your services that are reported by your users and customers.

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