Customer Relationship Management Software

powered by

Sun Online Solutions Pvt.Ltd.

Head Office: Happy Apartments, Opposite to Happy House, Shastri Road, Pune, India - 411 030
+91 20 6500 0975 info@SunOnlineSolutions.com | www.SunOnlineSolutions.com

Feature List

Feature	Description
	Sales Management
Lead management	Lead are contacts in initial stage which further may be converted into opportunities, contacts, or accounts. This includes creation of new leads and managing them by editing or deleting them
Contact management	Contacts are any individuals who are valid sales leads. This Contact can be associated with any opportunity or account.
Opportunity management	An opportunity specifies the estimated sales amount for an account. Every opportunity must be associated with an account.
Account management	An account contains your customer information such as name and address. Each account can be associated with other records such as opportunities and contacts.
Activity management	Use the Activities module to schedule and manage calls, meetings, and tasks. An activity is related to a record such as an account or a contact.
Document library	Documents module is used to create a library of documents and graphics that you can share with other users and contacts.
Notes and attachments	You can create or import notes related to a specific call, meeting, or task. Notes enable you to add comments on a call, meeting,or task. You can also attach supporting documents to a note.
Real-time reminders and alerts	Using this you can set the remainders for your meetings or tasks. The system can send out a reminder to all participants o meeting at the specified time.
	Marketing Management
Multi-channel campaign wizard	Using this you can create different campaigns using either E-mail or Newsletters,Web etc.
Campaign ROI calculation	For all executed campaigns, ROI(Return on Investments) report based on the “Closed/Won” opportunities can be generated from the campaign.
Web campaign click-through tracker	You can use one or more tracker URLs in your campaign emails to track the response to your campaign.
Lead capture web form auto designer	You can create a Web-to-Lead form to capture leads from Web-based campaigns or other Web-based sources such as your Website.
HTML email templates	You can use email templates to create form letters as automated email responses to inbound emails and for email campaigns.
Target management	A target is an individual that you have some information on but does not qualify as a lead or contact. Here You can generate new targets and add

	them to different target lists.
Email campaign management	Here you can create new email campaign. In an email campaign, you send out a one-time email with the information that is of interest to your targets.
Campaign management	In this we can create new campaigns like email campaigns or newsletter or web campaigns etc. Campaign diagnostics can be also generated and reports are generated based on this diagnostics.
Newsletter campaign management	In a newsletter campaign, you email a newsletter to your targets on a regular basis like daily,monthly or yearly basis.
Microsoft Word mail-merge integration	You can create a form letter template for campaigns using a Plug-in for Microsoft Word and merge it with your target list to create personalized letters for each target.
Subscription lists	A list of people you want excluded from the campaign email recipient. Suppression lists can be by ID, email address, or domain.
	Customer Support
Case management	this is used to track and manage problems with your services that are reported by your users and customers. After you create a case, you can associate it with related bugs.
Bug tracking	This section provides the Releases option that enables you to maintain a list of releases for your product which is useful in reporting new bug.
Unlimited data import and exports	We can import or export different records like leads or contact. There is no limit for importing and exporting data.
	Security
Record Level Security	Only Administrator can edit or delete particular record other users can only view them but cant edit or delete.
Multi Departmental Administration	Administrator can administrate multiple departments like sales, management.
Profile Based Departmental Security	Administrator may give access rights of only his concerned departments to the users.
Portal Only User	Only the users can add Website links as portals.
Access Control By User Role	User can access only those features that are allowed by the administrator.
	Reporting
Sales pipeline dashboard	A horizontal bar chart that displays the total amount for all your opportunities grouped by sales stage.

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Lead source dashboard	A horizontal stacked bar chart that displays total opportunities for each lead source.
Monthly pipeline by outcome dashboard	A vertical stacked bar chart where each bar displays the total sales pipeline for each month.
Opportunities by lead source dashboard	A pie chart that groups total sales opportunities by each lead source.
	Collaboration
Project management	This is used to create and manage projects for your organization. Every project is assigned to a user.
Shared Calender	This is the calender which shows the appointments of all other employees so that one can schedule his own appointment.
Employee Directory	Including search functions by first or last names, roles, departments and basic contact information.
Web Portals	This will contain the list of the related websites added by different users.
	Customization
Full source code access	Since it is open source software whole source code is available.
Unlimited number of custom fields	We can add any no of custom fields according to our requirement.
Custom formula fields	We can set some formula for any custom field.
Drag-and-drop custom layouts	Drag and drop facility is available to create custom layouts as per our requirements.
Rename tabs	We can rename the existing tabs as needed.
Custom tabs and web tabs by user	Also we can add new tabs as required.
Assignment notification	When some user is assigned to ant record he will receive notification about that.
User based time and date formatting	We can choose different date and time formats.
Multi-currency conversion	Multiple currencies are available with their conversions.
Work flow automation rules	We can create work flows so as to take some action when certain condition is satisfied.