





Mastering Your Business Experience

cloud-based enterprise applications built to deepen its relationships with customers



Boosts productivity

Can you remember the names of all your customers and prospects?

As a general rule, you need a CRM+ if you can't remember the name of every customer and prospect you deal with. It means you are starting to let opportunities slip through the cracks and forgetting to follow up in time.

Progressive Reliability

TreeOne CRM+ is a contemporary business application build to transform the way you build, progress, and retain clients. With embedded social and mobile user experiences you can proactively process guidance and breakthrough insights.

Why TreeOne CRM+?

- TreeOne CRM+ is from the roots of TabTree, the experts in IT and infrastructure management for over 18 years.
- Our always-ON CRM+ platform allows you to access it anywhere, anytime with rich CRM+ functionality across multiple device platforms.
- With wider customizable options you can customize and scale any feature the way you wish it should be.
- Reduces the over all cost of your marketing leads, minimizes administration costs & Reduces your opportunity cost. Increases productivity while increasing customer satisfaction.
- Reduces the potential for customer churn

5 Ways TreeOne CRM+

Can Improve Your Business.



Expansion :

Your sales executives have many accounts to handle, often it becomes confusing and the data's are misplaced. So to counter that TreeOne CRM+ software which stores and protects the information and keeps it at a click away. TreeOne CRM+ has the features like Activity, Preplanned Activities appointment, customized reporting



Tracking :

Every lead is valuable whether it's a cold or a hot lead. The TreeOne CRM+ helps to track the incoming leads, if it is a hot lead it is assigned and followed up or converted. So by the end of the day you are managing the leads effectively and the effectiveness of your resources in at higher note.



Growth :

There are accounts which are quite active and rewarding, with the help of TreeOne CRM+ you can now pinpoint and segment them. So now you know your target and treat them according to their choice, of course from their past purchases, maybe the color of brand or fit etc. This is how TreeOne CRM+ helps in drawing the data and you to plan your marketing strategies.



Accuracy :

Your customers are eager to see the product which they bought, so feed the delivery dates accordingly. TreeOne CRM+ solution offers a forecasting tool, which will help your sales executives to address your customers about the delivery of the product.



Productivity :

TreeOne CRM+ installation in your business helps you to leverage your sales and resource efficiency. This application helps you to access data at anywhere and anytime. All your business activities start improving. In short you are actually training your sales team as well as developing the best practices. The TreeOne CRM+ installation in your environment helps you and your customer to build a fruitful business relationship.

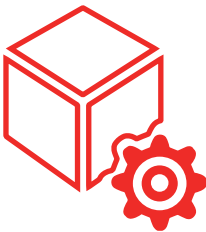
TOP features of TreeOne CRM+

Unique features of TreeOne CRM+



Report & Analytics

Track your leads, quotes, tasks and complete process with single dashboard



Mobile App

enables sales, marketing and customer service teams to access and manage key information in real time, wherever they are.



CTI Integration

Once leads enter your sales funnel, the next step usually involves your sales team reaching out to them personally via telephone calls



Automatic Notification

Internal and External Notification for Approvals and Scheduled activities



Campaign Analytics

Campaign Analysis are used to analyse Return on Investment (ROI) for every campaign which is being executed



API Integration

Integration with third party applications & easy access of data through lead capture.



Role Based Access

Choose the records you want to share, and control access to your records by giving read-only or read/write access.



Quotation Approval

Users can raise the quotation and request the Manager or Team Leader for the approvals



Incentive Tracking

Incentivize your performing Employee and motivate the whole team

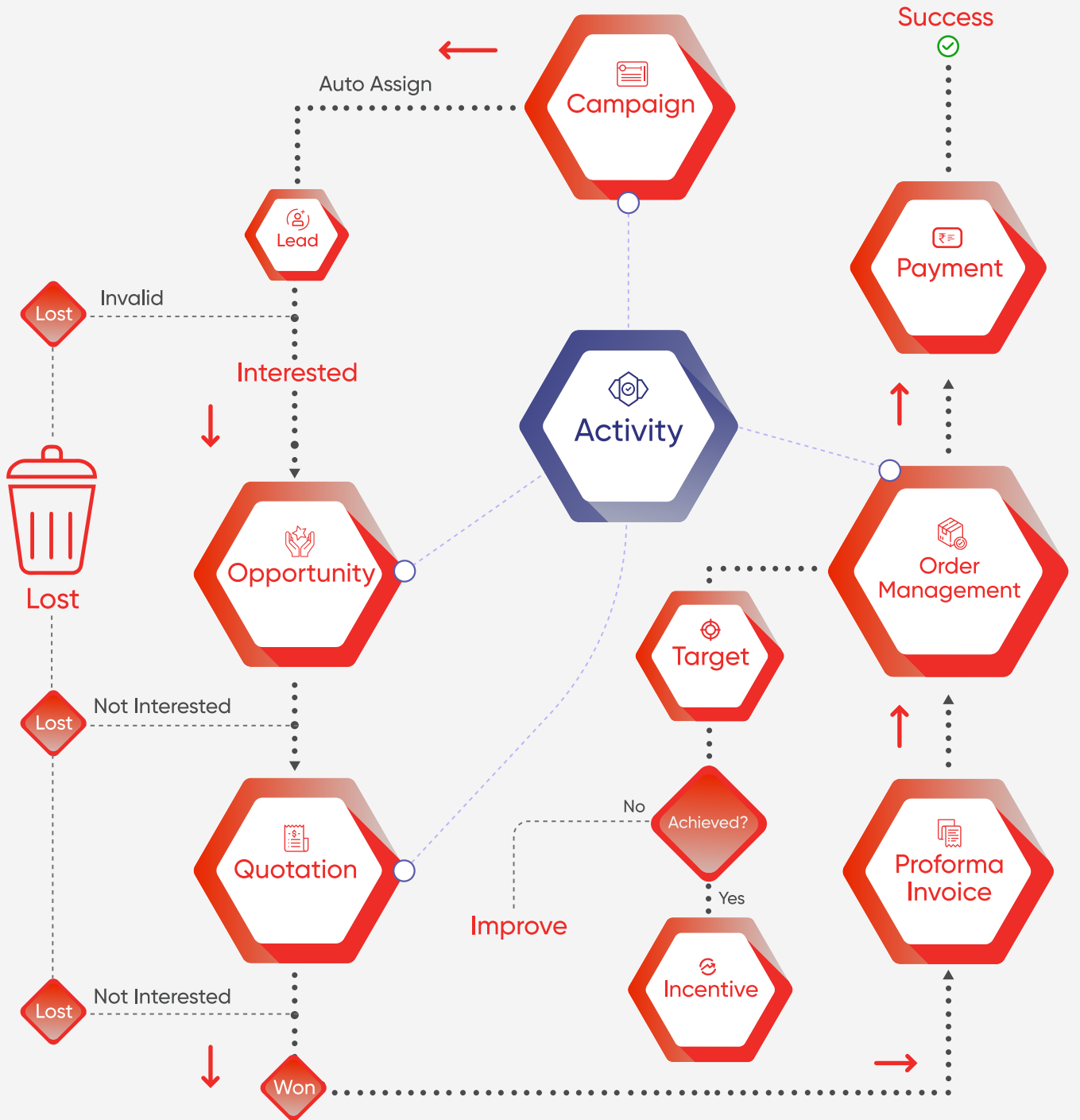


Opportunity Management

Track the total opportunity in hand and use the forecasting to project your sale

TreeOne CRM+

Lead Workflow



TreeOne CRM+

Key Terminologies

Campaign

Advertisement Campaigns or Promotional Activities are Termed as Campaign Campaigns

Lead

List of People with Name & Mobile Numbers are Terms as Leads

Lead Owner

The Name of the Employee who handles the Lead is termed as Lead Lead Owner.

Opportunity

Potential Customer who are interested in your service is called as Opportunity.

Opportunity Owner

The Name of Goodwill Employee who handles the Opportunity is termed Opportunity Owner.

Client

Customers who have signed up Account with you

Sales order

The sales order, sometimes abbreviated as SO, is an order issued by a business or sole trader to a customer.

Pro Forma Invoice

Pro forma invoice is a preliminary bill of sale sent to buyers in advance of a shipment or delivery of goods.

Queries

Queries from Your Existing Customers are in Enquiries

About Treeone softwares

Treeone is the collective suite of software to run your business comprehensively.

We have built independent software that can handle employee's tasks & tickets, manages cash flows, manages the relationship with customer & channel partners and generate reports and future analytics.

Our softwares



Taskz



CRM+



Tiketing



Kollector



Channel Partner



Analytiks

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