



Service & Support Package Features



Key Highlights

- All features of the Starter Package
- Service/support contracts
- Supported equipment lists
- Regular invoicing
- Ticketing
- Time tracking
- Scheduled contract emails
- Scheduled contract tasks
- Ticket auto emails
- Linked quotes, orders & invoices



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Contacts & Marketing

1. Unlimited contact records (tested to 100,000)
 - a. Customers and prospects
2. Contact upload/import facility
3. Company, branch, contact breakdown
4. Assign branches to
 - a. Sales zone (geographical area)
 - b. Salesperson
5. Categorise companies by
 - a. Customer type (user defined list)
 - b. Customer interest (user defined list)
 - c. Company activity (user defined list)
6. Assign contacts to
 - a. Sales funnel stage (user defined list)
 - b. Marketing Opt-out (user defined list)
 - c. Marketing source (user defined list)
7. Communication record
 - a. Typed list of conversations
 - i. File upload against conversation
 - b. Emails sent from OscarOnline
 - c. Letters merged from OscarOnline
 - d. Follow-ups with Dashboard reminders
 - e. Assign follow-ups to other users
8. Per company discount %

Can be different for each product group
9. Company linked quotes, orders, invoices



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Contacts & Marketing

10. Quotes and order confirmations with pdf documents
 - a. Customised colours and logo for quote and order documents
 - b. Email document directly from Oscar using completely custom email
 - c. Assign terms and conditions (user defined)
 - d. Ability to attach large terms and conditions
 - e. Payment plan
 - i. Amount due with order (pro-forma)
 - ii. Amount due on invoice
 - iii. Amount on credit
 - f. Auto calculated totals and margins
 - g. Up to 500 product/service lines
 - h. Multi-currency
 - i. Credit to marketing activity
 - j. Communication with follow-ups and Dashboard reminders
 - i. File upload against communication
11. Purchase orders with pdf purchase order creation
 - a. Can be different for each product group
 - b. Customised colours and logo for invoice document
 - c. Email invoice directly from Oscar
 - d. Repeat invoice setting for repeat every X months (creates Dashboard reminder)
 - e. Multi-currency
12. Invoices with pdf invoice creation
 - a. Customised colours and logo for purchase order document
 - b. Email order directly from Oscar
 - c. Multi-currency



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Contacts & Marketing

13. Mailing Wizard

- a. Merge to letters created with Microsoft Word or send emails directly
- b. Filter based on
 - i. Customer or prospect
 - ii. Geographical zone
 - iii. Customer types
 - iv. Customer interests
 - v. Opt-outs
 - vi. Marketing activity (contact source)

14. Granular Security

- a. Screen level access restrictions
- b. Edit or view access restrictions

Service Management

1. Unlimited service/support contracts

2. Contract billing

- a. Regular billable items list e.g. monthly service charge
- b. Repeat invoicing every X months

3. Supported equipment lists

- a. Action history
- b. Last and next service dates

4. Contract communication

- a. Conversations relating to the contract
- b. Emails and letters relating to the contract

5. Contract linked quotes, orders and invoices



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Service Management

6. Define contract managers (customer contacts with authority)
7. Scheduled email communication
 - a. Up to 500 scheduled emails per contract
 - b. Send emails X days before or after the start date
 - c. Send emails X days before or after minimum term expiry date
 - d. Completely custom emails
 - e. Filter based on
 - i. All contract managers or only the primary contact
8. Scheduled tasks
 - a. Get task reminders on the dashboard
 - b. Based around the start date
 - c. Based around the minimum term expiry date
 - d. Up to 500 scheduled tasks per contract
9. Action/support tickets
 - a. One-off tickets and tickets that reopen every X months (regular servicing)
 - b. Action history
 - c. Action timer
 - d. Auto email customer (optional)
 - i. Totally custom emails
 - ii. Email on ticket creation
 - iii. Email on ticket update
 - iv. Email on customer action required
 - v. Email reminders on action required
 - e. Auto close ticket on X days of no customer response
 - f. Assign ticket to other staff
 - g. Set follow-up reminder on ticket



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Service Management

10. Granular security
 - a. Screen level access restrictions
 - b. Edit or view access restrictions

Optional Bookkeeping

1. Multi-currency
 - a. Automatic conversion to GBP for reporting
2. Multi-currency bank accounts
3. Sales invoicing and pdf invoice production
 - a. Custom colours and logo
 - b. Email invoice directly with custom email
 - c. One-click full credit for mistakes
 - d. Convert sales order to invoice
4. Purchase invoice entry
 - a. One-click full credit for mistakes
 - b. Convert purchase order to invoice
5. Journaling
6. Cash posing and invoice alteration
 - a. Pdf receipt/remittance advice production
 - b. Auto accounting for exchange rate differences
 - c. Undo facility
7. Bank reconciliation



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Optional Bookkeeping

8. Customer statements

- a. Batch runs
- b. Automatic emailing of statements
- c. 3 custom levels of wording depending on how overdue invoices are
- d. Pdf statement with custom colours and logo

9. Credit limits

- a. Branch level or company level limits

10. Management reports

- Unpaid Invoice List
- Purchase Daybook
- Purchase Ledger
- Aged Creditors
- Unpaid Purchase Invoice List
- Nominal Ledger
- Audit Trail
- Trial Balance
- Profit and Loss
- Balance Sheet
- Cashbook
- Unallocated Cash List

11. VAT returns auto calculated with HRMC layout

12. Profit centres

- a. Purchase nominal accounts linked to sales nominal accounts to create gross profit centres.



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Optional Bookkeeping

13. Yearend

- a. Yearend re-run facility

14. Granular security

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- b. Edit or view access restrictions



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