Contacts & Marketing Datasheet

Feature Highlights

- Communication tracking
- Sales follow-ups
- Mailing wizard
- Marketing performance tracking
- Direct email quotes and invoices

Available in

- Starter Package
- Service & Support Package
- Products & Services Package
- Solution Provider Package
- Event/Training Provider Package
- Clubs & Associations Package
- Membership & Events Package

OscarOnline®

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Overview

OscarOnline® (Oscar) has been designed to be simple to learn and easy to use, aimed at meeting the needs of UK small businesses.

The Contacts & Marketing module is useful to any business managing multiple customers and prospects and will help you generate more business by making communication quick, easy, and traceable.

Oscar can be accessed securely from any device with a web browser making it useable on the road, at a customer's site and even on holiday!

Dashboard

Your OscarOnline Dashboard shows your appointments and tasks for today. It also provides a central hub for accessing the rest of the system. You can easily see who your top 10 big spenders are and mark tasks as complete as you work through them.

Contacts

Oscar can hold both business and domestic contact information for you. Business contacts are broken down in three levels; company, branch and contact. Basically, Oscar understands that one company can have multiple branches and each branch can have multiple contacts. There are several different checks that take place in the background when loading a contact to reduce the chance of duplicating records that already exist.

Apart from the normal contact information held in Oscar, you can also define your own contact types. These can be used for example to define contacts interested in certain products / services or to categorise your contacts by any other method suitable for your business e.g. reseller / end user. This allows you to communicate different messages at different times to specific contact types.

Marketing information such as where the contact came from, their geographical zone and any communication opt outs taken can be stored against contacts. The geographical zone can be used for example to deliver communications to particular zones such as a special offer for local contacts only.

A contact's communication tab shows the past communications with your company. It can include notes following telephone conversations or meetings, as well as copies of emails and uploaded documents such as hand written meeting notes or site photographs. You can also set follow-up tasks to cover your next actions. These will appear on your task list on the Dashboard on the appropriate day. You can even assign the follow up task to somebody else if you know you are going to be away or that they are responsible for the next step in the sales process.

Contacts in Oscar can be searched by anybody in your company using their contact id, name, and company name, first line of their address, postcode, telephone or email.

Tasks

Your task list on the Dashboard shows all the tasks you are due to complete today including any overdue tasks. You can peak at any associated task notes and you can view a full list of tasks and create new tasks using the tasks screen.

Many tasks are created automatically for you depending on the roles that apply to your user account's group in Oscar. For instance, if you are in the "invoicing role", when a periodic invoice is due to be produced for a customer, you will see that task. And often, when a task relates to performing a specific function, clicking on the task will take you straight to the screen you need to use.

Oscar can also optionally email tasks to you for the day, which is particularly useful if you're on the road a lot where you won't necessarily log in every day to check if any tasks are due.

Appointments

Your appointment list on the Dashboard shows all the appointments you have today. You can peak at appointment notes and view all appointments from the appointments calendar.

Mailings

Email campaigns can be sent directly from Oscar and mail merges can be produced for printing straight from your contacts in Oscar. This is a massive time saving over exporting and then importing into third party campaign software.

Mailings can be filtered based on whether sending to customers or prospects (or both), the customer type, customer interests, geographic zone and based on the marketing activity credited with generating the contact. Contacts that have opted out of marketing are excluded by default and so are contacts that have been sent the communication already (but this can be manually overridden). Contacts can also be added or excluded on an individual basis.

Emails and MS Word documents (saved in XML format) are used to merge the campaigns into. You can create these yourself or have them created by us as part of our service. There are many merge fields available such as contact name, salutation and address fields. An opt-out link can also be included in email templates that will allow the contact to opt out via the www.oscaronline.biz website or via your own website if integrated.

To help reduce the risk of your emails being blocked by Spam filters we forward all emails via your own email systems. We can provide one for a small charge if you don't have one already in place.

Marketing Performance

By associating new contacts, quotes and orders to one of your marketing activities, you can use Oscar to work out which marketing is working best for your businesses.

A cost total can be assigned to your marketing activities which can be used to work out your return on investment.

Reports can also be generated showing contacts, quotes and orders produced and grouped by the marketing activities that generated them.

Quotes

Quotes are quick and easy to produce in Oscar. Just a click from the contact record and the quote is pre populated ready for you to add lines to the quote.

You can also add the marketing source and your confidence level. You list items to be quoted which can be free typed, or added from the product database if you use the Products module. You can add list price, buying price, discount percentage and any delivery charges. Oscar will then generate your quote as a pdf document for you to review, print or email.

Oscar will tell you how much money you are making on your quote and will even convert foreign currency values using today's exchange rate.

Quotes can be emailed directly from Oscar, saved and emailed manually, or printed and posted/faxed more traditionally.

Once your quote is created, you can begin following the quote through to order by setting follow-up dates and noting conversations with your customer as you work on converting the sale. You can also upload supporting files that are applicable to the quote. If the customer calls regarding their quote, this information makes it easy for a colleague to see the state of play even if you aren't in the office.

Quotes can be locked once sent to the customer, which marks them as active and ready for possible conversion. Quotes can be easily duplicated to save time on requotes.

Reports will show you how many active quotes you have and provide valuable performance indicators such as conversion rates, average margins and grouping by sales person.

The total active quote value is displayed and a weighted value it also supplied based on the confidence level you assign to each quote. If you are buying or selling in foreign currencies reports will show the original value of the quote and also include any change based on exchange rate fluctuations.

Orders

When an Order is confirmed, Oscar takes the locked quote and converts it to an Order ready for you to add any customer references such as PO number as well as any options / extras that the customer has ordered. It's also possible to create orders directly without having to first create a quote.

Order confirmations can be produced in pdf format and sent in the same way as quotes. Payment plans can be created for orders, with a value due now (at the time of order), a value due on delivery and the remainder on credit. The payment plan will show on the order confirmation unless you chose it not to. When a value is set for due now, the order confirmation will also serve as a Pro-Forma Invoice (a payable invoice that is not a tax/VAT invoice).

As with quotes, the reports in Oscar will show how many active orders you have and provide performance indicators such as average margins, cancellations and groupings by sales person.

Suppliers

Oscar can store basic supplier information such as supplier name, contact name, address and contact details. Additionally, you can flag a supplier as for resale; meaning this supplier can be used in your product database (Products module required). You can also flag suppliers as EC supplier which is used with the Bookkeeping module.

Each product in Oscar can have multiple suppliers if required.

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Purchasing

Oscar can store basic supplier information such as supplier name, contact name, address and contact details. Additionally, you can flag a supplier as for resale; meaning this supplier can be used in your product database (Products module required).

You can purchase in any currency, assign a project number, supplier quote ref, supplier order ref and set a follow-up date to give you a dashboard reminder to chase your supplier.

Purchase orders can be duplicated for regular ordering and Oscar will produce a professional purchase order pdf for you to send to your supplier. Upon saving Oscar will assign your purchase order a unique purchase ID.

Invoices

Sales invoices can be produced by converting orders; Oscar lets you part invoice an order and/or add additional items to the invoice. It's also possible to create an invoice without having to first create an order. Once an order is fully invoiced it is automatically removed from your live order list.

Oscar will produce a professional VAT invoice in pdf format (if applicable) for you to send to your customer by the same methods available for sending quotes.

Saving an invoice will update the Sales Ledger and the Nominal Ledger which becomes applicable if you make use of Oscar's Bookkeeping module.

For the purposes of the Contacts & Marketing module you can report on sales made between dates and you can also get a sales person grouping.