

Event/Training Provider Package Features



Key Highlights

- All features of the Starter Package
- Product/service database
- Scheduled emails around event
- Scheduled "set and forget" tasks
- People management
- Send invites wizard
- Stationery merge
- Unlimited events/training classes
- Guest categorising
- No show tracking



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN

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



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN

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



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN

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

Event Management

1. Unlimited events/training classes

2. Guest lists

- a. Identify delegates
- b. Identify booking contacts (the person that made the booking for a group)
- c. Identify speakers
- d. Identify no shows
- e. Identify confirmed attending

3. Invite mailing

- a. Send emails
- b. Produce merged letters



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN

Event Management

4. Scheduled email communication
 - a. Up to 500 scheduled emails per event
 - b. Send email's X days before or after the event date
 - c. Completely custom emails
 - d. Filter based on
 - i. Confirmed or no confirmed
 - ii. Delegates
 - iii. Speakers
 - iv. Booking contact
 - v. No show
5. Scheduled tasks
 - a. Get task reminders on the dashboard
 - b. Based around the event date
 - c. Up to 500 scheduled tasks per event
6. Stationery merge
 - a. Merge guest information to documents created using Microsoft Word
 - b. Select delegates individually or using selection criteria
7. Granular security
 - a. Screen level access restrictions
 - b. Edit or view access restrictions



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN

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
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



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN

Optional Bookkeeping

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.

13. Yearend

- a. Yearend re-run facility

14. Granular security

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



03303 800 601



1A HIGH STREET, STUDLEY, WARWICKSHIRE, B80 7HN