



## Membership & Events Package



### Key Highlights

- All features of the Starter Package
- All features of the Event/Training Package
- All features of the Clubs & Associations Package
- Product/service database
- Direct email quotes and invoices
- Scheduled emails
- Scheduled "set and forget" tasks
- Communication tracking
- Stationery merge
- People management



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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

## 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

### 4. Link events to a club



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## Event Management

5. 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
6. Scheduled tasks
  - a. Get task reminders on the dashboard
  - b. Based around the event date
  - c. Up to 500 scheduled tasks per event
7. Stationery merge
  - a. Merge guest information to documents created using Microsoft Word
  - b. Select delegates individually or using selection criteria
8. Granular security
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## Club Management

1. Unlimited clubs/associations



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# Club Management

## 2. Member lists

- a. Identify renewal contacts
- b. Identify trial members
- c. Whole company, branch or individual contact membership scopes

## 3. Member mailings

- a. Send emails
- b. Produce merged letters
- c. Club specific mailing filters based on
  - i. Trial or paid members
  - ii. Renewal contacts or other members
  - iii. Current or historic members

## 4. Multiple club fees/charge bands

- a. Joining fee
- b. Renewal fee
- c. Included user/member limit
- d. Additional member fee
- e. Membership term (months)
- f. Fee currency

## 5. Member invoicing

- a. Pdf invoice with customised colours and logo
- b. Email directly
- c. Automatic invoice wording

## 6. Scheduled email communication

- a. Up to 500 scheduled emails per club
- b. Send email's X days before or after the members renewal date



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## Club Management

- c. Completely custom emails
- d. Filter based on
  - i. Trial or paid members
  - ii. Renewal contacts or other members
  - iii. Current or historic members
- 7. Scheduled tasks
  - a. Get task reminders on the dashboard
  - b. Based around the member's renewal date
  - c. Up to 500 scheduled tasks per club
- 8. Stationery merge
  - a. Merge member information to documents created using Microsoft Word
  - b. Select members individually or using selection criteria
- 9. Granular security
  - a. Screen level access restrictions
  - b. Edit or view access restrictions

## Products

- 1. Unlimited products
- 2. Product import facility from spreadsheet
- 3. Fixed selling prices (GBP) or calculated based on target margin
- 4. Multi-currency buying prices
- 5. Multiple suppliers for one product
- 6. Multiple delivery prices based on
  - a. Weight
  - b. Location of delivery



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## Products

- c. Delivery option (next day etc)
- 7. Up to 500 lines of Description per product (product children)
  - a. Products made of other products
  - b. Total buying costs calculated
  - c. Hide facility for technical lines
  - d. Different descriptions for customer vs supplier
- 8. Buying price breaks based on quantity purchased
- 9. Selling price breaks based on quantity sold
- 10. Product groups
- 11. 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



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## Optional Bookkeeping

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  - a. One-click full credit for mistakes
  - b. Convert purchase order to invoice a. Screen level access restrictions
5. Journaling
6. Cash posing and invoice allocation
  - 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



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## 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

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