



# Starter Package Features



## Key Highlights

- Communication tracking
- Sales follow-ups
- Mailing wizard
- PDF documents
- Purchase orders
- Quoting
- Sales orders
- Invoicing
- Marketing performance tracking
- Direct email quotes and invoices



**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

## 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



**03303 800 601**



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

## Optional Bookkeeping

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
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



**03303 800 601**



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

## Optional Bookkeeping

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**