

CRM



Total control over customers and prospects

The ability to win new customers and successfully manage existing ones is an essential part of business growth. Opera 3 CRM is an integrated end-to-end solution which can help your business develop more profitably and increase customer satisfaction by promoting long-term relationships.



Winning new business

The sales cycle can be a long and complicated process and it's easy to lose prospects in the sheer volume of activity your sales and marketing people are generating. With Opera 3 CRM you can capture prospect and contact information, identify the opportunity and closure probability, manage the relationship process through the entire sales cycle, report on their profitability and increase your business potential with them, all from one complete solution. Opera 3 CRM will help to streamline your procedures and manage the progression from prospect to customer, quote to order, so that you will never lose sight of an opportunity or customer again.

Intelligent forecasting and reporting

The ability to track opportunities and accurately forecast against them is essential to business growth. Opera 3 CRM builds a full, clear picture of your sales pipeline and the value of those opportunities broken down by owner, contact, referral method, sales type and area.

Plus, the powerful reporting ability of Pegasus XRL allows you to report on all aspects of the sales cycle and analyse any other area of the business using Microsoft Excel®.

Total accountability

Once a prospect becomes a customer, Opera 3 can convert the record into a Sales Ledger account so you can immediately invoice or convert quotes to orders in Sales Order Processing.

The cycle is completed with the ability to continue to log activity such as mailings, conversations, tasks and promotions to existing customers in order to manage these more effectively.

Remote access

When your sales team is out on the road, it is essential to be able to manage CRM data on the move. With CRM Remote, users can download prospect and customer data onto their laptop; they can process, edit and amend contact details and histories, then synchronise the changes back to the central office via the Internet.

Key benefits

- Eliminates the need to maintain data on several systems.
- Single point of entry for new prospects and existing customers and suppliers, which can be cross-referenced from the Sales/Purchase ledgers.
- Integrates with Sales Ledger, Purchase Ledger, Sales Order Processing, Purchase Order Processing and Stock Control.
- Maintains unlimited contact details (including site addresses) within a company.
- New contacts can automatically update your Microsoft Outlook® address book.
- User-definable fields and look-ups for Contact, Company and Opportunity forms.
- Send e-mails and import incoming e-mail from Microsoft Outlook.
- Record notes and history against a contact.
- History is automatically updated by activities that take place, such as letters and mailshots.
- Record and track sales opportunities against a contact.
- Generate quotations against a sales opportunity.
- Book appointments with a contact. Send meeting requests via Outlook to internal/external contacts and automatically update your Outlook calendar. Log 'To do' tasks against contacts, opportunities or contracts.
- Send mail merge e-mails via Microsoft Outlook for a contact or group.
- Generate mailshots (using Microsoft Word®) for lists of contacts/groups.
- Convert prospect/quotation details to live customer/sales orders.
- Sales and Activity reports.
- Import or update existing customer and supplier records from the Opera 3 Sales and Purchase Ledgers.
- Remote access, for sales people on the move.
- Integration with Excel for sales pipeline reporting, and with Business Intelligence tools such as Pegasus XRL, PIM and Pegasus Dashboards for analysis.
- Integration with Document Management.

