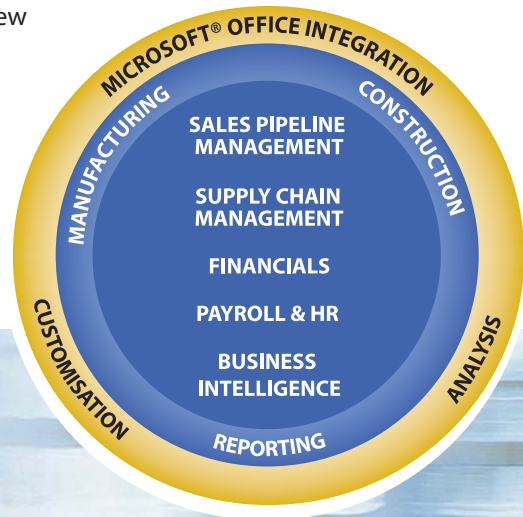


Sales Pipeline Management

Total control over customers and prospects

In a hectic, 24/7 business world the ability to win new customers as well as manage existing ones is an essential part of success. Opera II provides a complete end-to-end solution to help businesses develop more profitably and increase customer satisfaction by promoting long-term relationships.



New Business

Opera II allows you to capture prospects, convert them to customers, manage the relationship process through the whole sales cycle, report on their profitability and increase your business potential with them, all from one complete solution. 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 in order to find new customers. Opera II Sales Pipeline Management (SPM) helps to streamline your procedures and manage the progression from prospect to customer, 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. At the touch of a button, Opera II SPM builds a full picture of the sales pipeline and the value of those opportunities through the sales funnel. This can be broken down by owner, contact, referral method, sales type and area, to give a clear view of your sales pipeline.

The powerful reporting ability of XRL combined with intelligent alerting 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 II can convert the record into an account within the Sales Ledger so you can immediately process orders against them.

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.

Key Benefits

- Fully integrated module for Pegasus Opera II; when combined with Microsoft® Outlook, this eliminates the need to maintain data on several systems
- Maintain company details – single point of entry for new companies (eg Prospects) or existing companies can be cross-referenced from the Sales/Purchase ledgers
- Maintain individual contact details (including separate addresses) within a company
- New contacts can be automatically added to your Microsoft® Outlook address book
- User-definable fields for all Forms, ie Contact/Company/Opportunity
- Send e-mail/e-shots and import incoming e-mail from Microsoft® Outlook 2003
- 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
- Quotations can be generated for a customer or prospect and associated with a sales opportunity
- Book appointments with a contact. These can be added to your Outlook diary and recorded against the contacts history. Log 'to do' tasks against contacts, opportunities or contracts
- Send 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 funnel report
- Sales forecasting reports, adjusted for probability. Analysis of sales by status/user/contact/company for a given date range
- Activity Reports – including time-based reports
- Customers and suppliers – import or update existing records from the Opera II Sales/Purchase Ledgers

Item	Type	Date & Time	Description
167	Letter Sent	7/4/2007 4:29 PM	Quick Letter
166	Field Changed	21/5/2006 9:17 AM	Last Contact - Data
138	Email Sent	16/4/2006 3:21 PM	Re Quote
112	Email Sent	20/3/2006 12:37 PM	Call Customer schedu
51	Excel Spreadsheet	18/9/2005 9:51 AM	Sales By Referral Met
48	Excel Spreadsheet	17/9/2005 9:51 AM	Sales By Stage
36	Letter Sent	27/8/2005 9:51 AM	Mail Shot - Printer Pr
37	Letter Sent	27/8/2005 9:51 AM	Mail Shot - Printer Pr
9	Successful Complete	25/4/2005 9:51 AM	Vist

Re Quote
Elaine Carter - Orion Vehicle Leasing Ltd 01256 78654356
Standard Alliance level SLA for completion