

Sales Pipeline Management

The ability to win new customers and successfully manage existing ones is an essential part of growth. Opera II with Sales Pipeline Management provides a complete end-to-end solution to help businesses develop more profitably and increase customer satisfaction by promoting long-term relationships.

Total control over customers and prospects



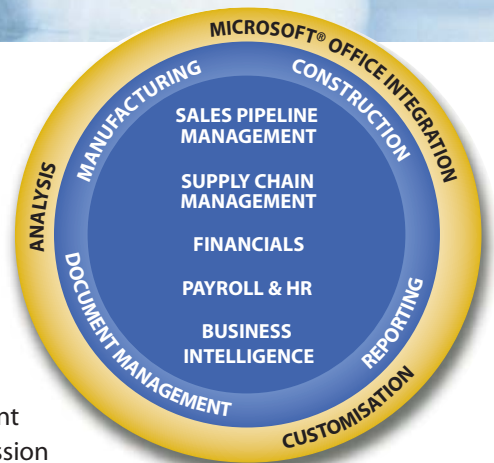
New Business

Opera II allows you to 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. 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, clear picture of the sales pipeline and the value of those opportunities through the sales funnel, broken down by owner, contact, referral method, sales type and area.

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 so you can immediately process orders against them, or convert quotes to orders in SOP.

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 eliminating the need to maintain data on several systems
- Maintain company details: single point of entry for new prospects and existing customers/suppliers can be cross-referenced from the Sales/Purchase ledgers
- Maintain 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-mail/e-shots and import incoming e-mail from Microsoft Outlook 2003

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

- 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 automatically to your Outlook diary and recorded against the contact's 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