Customer Relationship Management
Managing the lifeblood of your business

Pegasus: always improving the way you work

Pegasus has been one of the UK's leading suppliers of financial and business solutions for 30 years, with over 20,000 companies across the country currently benefiting from our products.

This market-leading position is a reflection of our innovative software solutions, which offer real business benefits and value to our customers.

Pegasus products are sold and supported through hand-picked Pegasus Partners; a highly skilled nationwide network of specialists who will guide you through the entire sales process.

Your local Pegasus Partner will ensure you choose the product relevant to your industry sector comprising all the tools needed to improve the way your organisation works.

Pegasus is part of Infor, one of the world's leading enterprise solutions providers.

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One System. One Solution.

Opera

CB Services invest in CRM from Pegasus

CB Services are Northern Ireland's largest supplier of vehicle washing machine equipment. A major contributor to their success has been their ability to efficiently service their customers.

"We were looking at becoming more efficient and wanted to make sure we had the correct tools in place to help the business grow in the future. Speed of invoicing is very important in the service industry, and we need to have back office accounts, financial and service management all in one place with the ability to see where our engineers are and most importantly send and receive work, including documentation to and from them quickly."

Jacqui Collins, Director of CB Services.

Introducing Opera 3
A superior intelligence

Opera 3 is a complete business solution: it can be fully integrated throughout your organisation, eliminating the need to run separate finance, payroll, CRM or service systems.

Offering unbeatable inter-departmental integration and knowledge sharing, Opera 3 can give everyone in your company a unified view of the business. We have designed it to ensure it's easy to learn and use. Even your mobile workforce can be constantly in the loop via web browser applications, PDAs and other remote tools such as TomTom Business Solutions.

The way Opera 3 delivers the required information at the right time allows for fully informed decision making. And because it is completely up-to-date with legislative changes, you need have no concerns about compliance.

With Opera 3, flexibility comes as standard. Its modular applications, features, customisation, configuration and setup options allow you to build the specific solution you need to suit your particular business. It means you can buy what you need, when you need it, and expand the solution as your business grows. Naturally, we've made it simple for you to upgrade from your existing system.

Opera 3 is the ideal solution for growing businesses who need more power, more users or more flexibility.

Customer Relationship Management

Sales are the lifeblood of your business. Opera 3 Customer Relationship Management (CRM) is designed to help you manage opportunities and convert them into sales. CRM allows you to generate prospects and manage your relationships with them effectively. And once those prospects become customers, CRM helps you retain them through effective account management and after sales service.

CRM helps to streamline your marketing activity and shorten your sales cycle. It ensures you never miss an opportunity or lose sight of a customer, and gives your sales team vital access to all information, even when they are on the road.

Opera 3 CRM integrates with Outlook, Excel and Word, maintaining individual contact details, adding new contacts to Outlook automatically, and continuously updating your contact history with every letter, mailshot and appointment. It seamlessly integrates with Service & Helpdesk Management. Service Management enables management of contract and equipment, project processing, service and repair, and billing. Helpdesk Management provides engineer and resource scheduling facilities, full Helpdesk processing with an intuitive Knowledge Base to help you answer customer calls efficiently.

CRM also integrates with Supply Chain Management and Financials, eliminating re-keying and ensuring account and billing information is always accurate and easily accessed.

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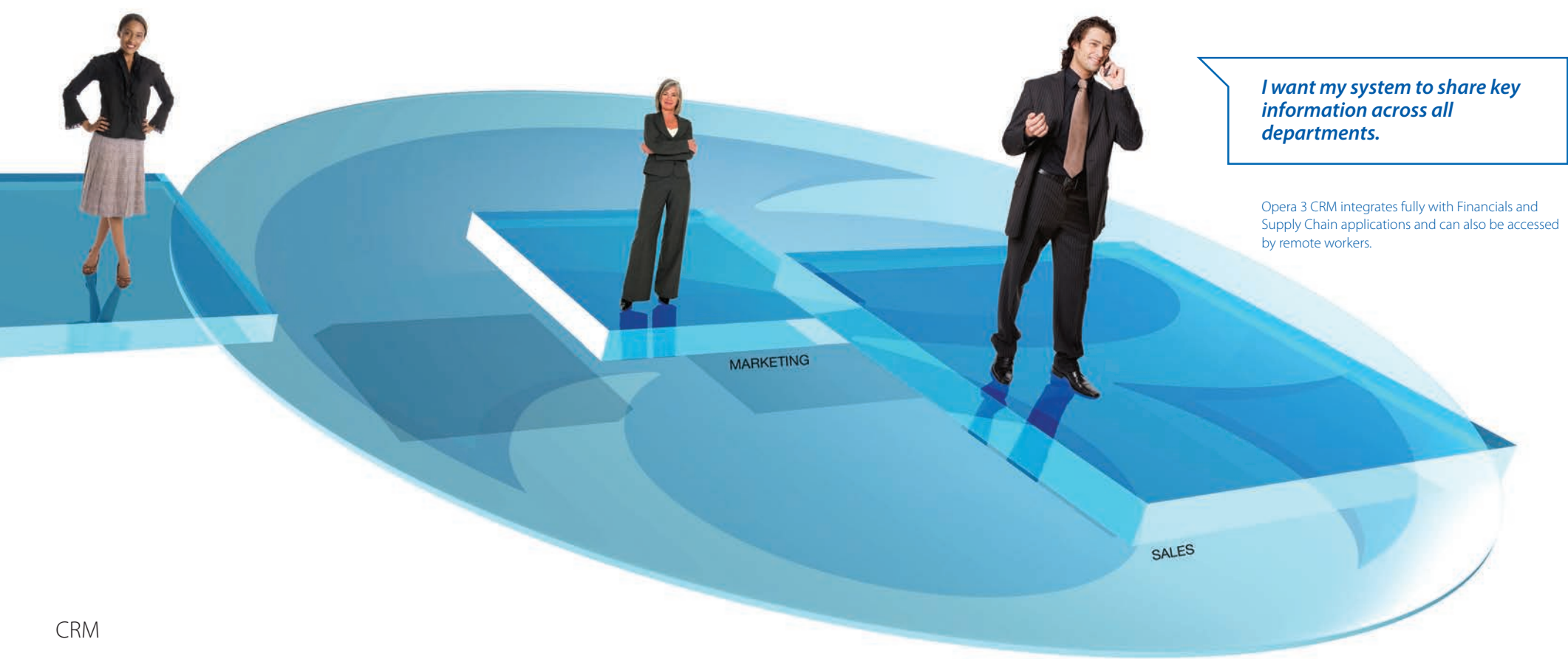
Opera 3 CRM integrates fully with Financials and Supply Chain applications and can also be accessed by remote workers.

MARKETING

SALES

CRM

The growth of your business is critically dependent on your ability to win and then retain new customers. CRM is designed to help you optimise opportunities and manage your customer relationships.

New Business
CRM enables you to identify opportunities and closure probabilities, capture information on prospects, manage relationships, and report on profitability.

The sales cycle can be long and complicated. CRM helps you to streamline this process and manage the progression from prospect to customer.
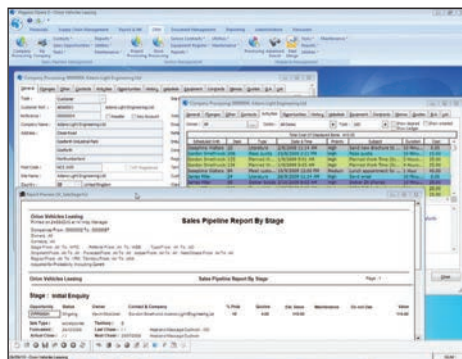
SALES PIPELINE REPORT

Intelligent Forecasting and Reporting
CRM gives you the ability to track opportunities and accurately forecast against them. It builds a full and clear picture of your sales pipeline and its value, broken down by owner, contact, referral method, sales type and area.
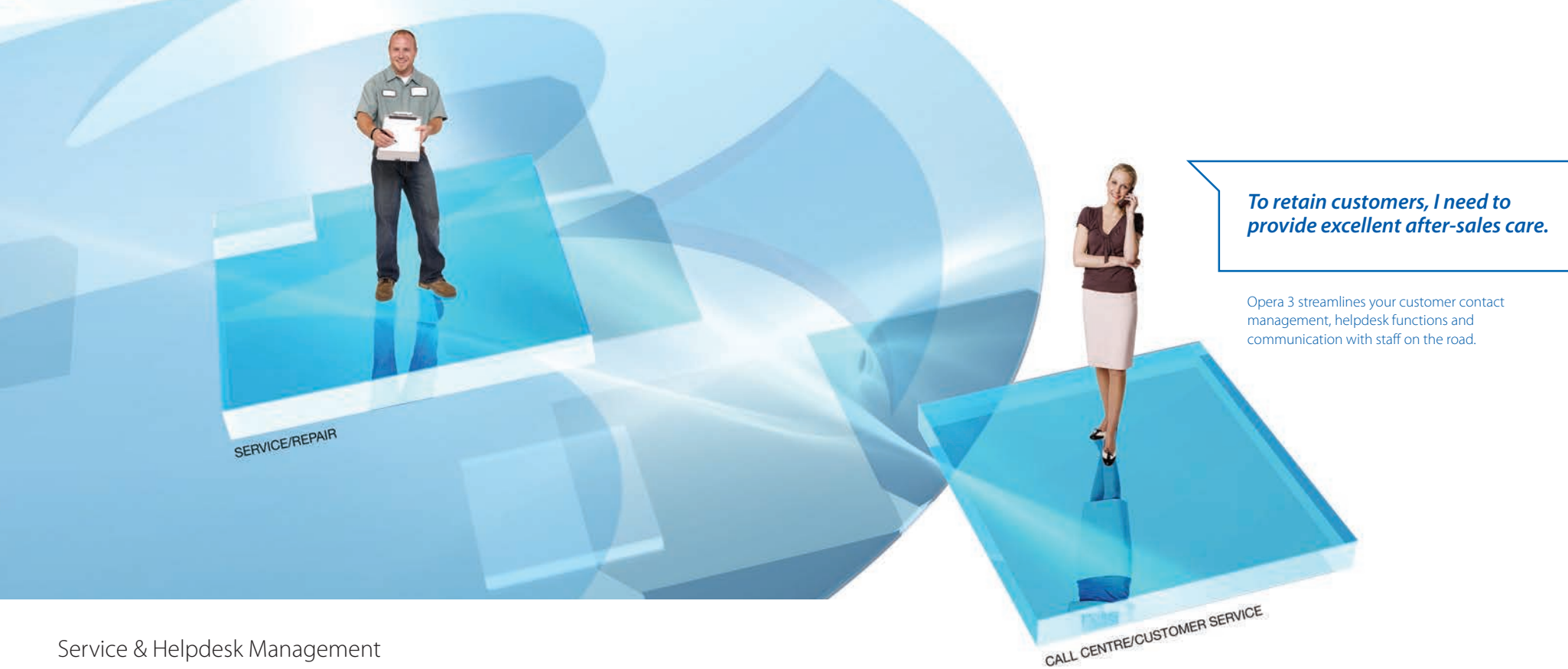
Remote Access
CRM Remote enables management of prospect and customer activities on the move. Your sales team can selectively download data to their laptops, continue to work remotely, and then synchronize the updated records with the office via the Internet.

Benefits
- Single point of entry for prospects, customers and suppliers
- Unlimited number of contacts within a company
- New contacts automatically update Outlook
- User-definable fields and specific look-ups on company, contact and opportunities
- Generate e-mails and mail-shots
- Import incoming/outgoing e-mail from Outlook

- Activities such as mail-shots automatically update history
- Record and track sales opportunities
- Generate quotations and associate them with sales opportunities
- Book appointments and automatically update Outlook
- Convert prospects to live customers, and quotations to sales orders
- Generate sales and activity reports
- Remote access

Opera 3 streamlines your customer contact management, helpdesk functions and communication with staff on the road.

SERVICE/REPAIR

CALL CENTRE/CUSTOMER SERVICE

Service & Helpdesk Management

Service & Helpdesk Management, in conjunction with CRM, enables you to track sales through their lifecycles from original opportunity to order, delivery, installation, billing, contract maintenance and servicing.

Service & Helpdesk Management integrates seamlessly with other Opera 3 applications, eliminating the need to run multiple software packages. And you can log Helpdesk calls and activities against companies, contacts, opportunities, projects, contracts and equipment records.

Service Management
Won opportunities can be progressed from CRM to Service Management as Installation Projects, enabling you to plan the implementation of work. Phases can be added and updated with timescales and budgets to plan stages such as design, groundwork, installation, workshop hours and training.

Service Contracts and Billing
Service Contracts Processing enables you to maintain and track full history of all contract records. Contracts can cover multiple pieces of equipment and have helpdesk calls, visits and activities associated with them. Flexible billing routines make it easy to audit and post documents to Sales Order Processing/ Invoicing to be progressed to invoice as required.
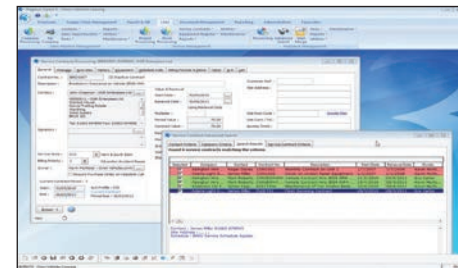
SERVICE CONTRACTS ADVANCED SEARCH

- Contracts can be SLA-specific and cover multiple items of equipment
- Create custom fields for recording contract-specific information
- Create flexible billing periods and items using a simple Wizard
- Create and schedule preventative maintenance visits

- Associate site visits and helpdesk calls with contracts
- Post chargeable work through to Sales Order Processing/Invoicing as documents ready for invoicing
- Automatically update relevant cost and revenue codes in Job Costing
- Manage contract renewals, integrating with Word and mail merge
- Bill contracts in foreign currency at the prevailing exchange rate
- Produce contract costing reports
- Attach documents, e-mails and correspondence
- Set up contract balances to include inclusive minutes, calls or purchase order cover values
- Globally update contract billing charges and equipment cost prices

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Equipment Register

You can maintain an Equipment Register to build a full record of previous Owners, Service History, Components, Skills and Disposal requirements. You can record third party details, track Built On and Warranty Expiry dates, plan and create preventative maintenance visits due for equipment items, and analyse costs and charges associated with each Equipment Item.

Benefits

- Import Equipment Items from Sales Order Processing/Invoicing
- Associate Equipment records with serial numbers, and link back to original SOP/Invoicing document
- Base Equipment records on a Model record, automatically inheriting all Components and History
- Create custom fields to record information against Equipment records
- Transfer service history for Equipment Items covered by contracts to new Owners
- Track Warranty and third party details for Loan Equipment
- Analyse costs and charges associated with Equipment items
- Batch create Preventative Maintenance calls due for equipment items

Helpdesk Management

Helpdesk Management enables you to record calls, complaints, change requests, installations and Preventative Maintenance visits. You can log calls against contacts and link back to the relevant Contract and Equipment item to build a Knowledge Base.

You can configure PDAs, Tablets, Internet/Intranet web forms and TomTom® Business Solutions to work with Helpdesk Management allowing remote and quick entry of information.
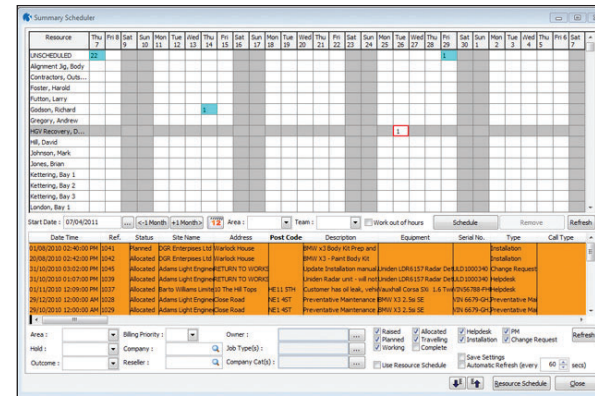
Resource and Summary Scheduler

The Resource Scheduler allows you to plan and control call types, resource teams and dates through intelligent Skills Groups and Service Area matching, ensuring the correct assignment of resources.

You can also allocate rooms, machines and workshops, with free resources being clearly visible.

Updates to the schedule automatically create Activities and can also update Outlook via meeting requests for the allocated personnel.

The Summary Scheduler enables you to schedule calls in bulk by presenting a summary view of all resources for a chosen month. You can view all calls for a particular resource, drill down to individual calendar views, and see an overall view of the number of calls scheduled over any four-week period.

SUMMARY SCHEDULER

Benefits

- Allocate staff and resources to jobs with Resource Scheduling
- Generate Outlook Meeting Requests to internal and external contacts
- Print call sheets for engineers heading out on site
- Enter worksheets for time, parts, expenses and requisitions, and post as Documents to SOP/Invoicing
- Optional integration with Job Costing allows you to update Job/Project and Cost Codes
- Move replacement parts out of Stock, return to Stock, or scrap
- Progress calls through stages: Raised, Allocated, Planned, Travel, Working and Completed
- Progress calls through user-defined stages and allocate to relevant Owner
- Create Sales Opportunities from Helpdesk calls automatically
- Call Types available are: Helpdesk Call, Change Request, Installation Call and Preventative Maintenance
- Flexible Helpdesk structure handles Contracts, serialised Equipment and calls relating to ad-hoc 'Pay As You Go' type work
- Assign and monitor SLAs for each customer
- Integrate with Outlook and Word for letters, e-mails and mail merges
- Integrate with Document Management to store related documents against a call
- Integrate with Business Intelligence tools such as Pegasus Dashboards and Pegasus XRL to enable data analysis and reporting

Opera

Absolute Marketing records greater efficiency with Opera 3

Absolute Marketing, a record label marketing and management company are now using Opera 3.

"Our previous system wasn't able to cope with the size of the data files which are necessary for us to manage our accounts, so we set about sourcing a new solution which would support our expanding requirements. Opera 3's XRL reporting is fantastic, and as well as being able to export reports easily to Excel, it gives us much better management information to help us run the business and maximise profitability."

Deborah Cutting, Management Accountant, Absolute Marketing.

The Opera 3 family

Financials
You'll find the analysis of your cashflow that Opera 3 delivers is invaluable to your profit generation.

Supply Chain Management
Opera 3 gives you complete control of the whole supply chain, right at your fingertips.

Payroll & HR
Complex payroll functions are made quick and easy, and HMRC accreditation ensures you are always compliant.

CRM
Opera 3 CRM is full of ways to help you to work smarter, manage prospects and opportunities and convert them into sales.

Business Intelligence
Get precisely what you need to know without wasting valuble time.

Service & Helpdesk Management
Put service at the core of your business and retain customers for the long term.

Document Management
Store all your business documents in one central location: save time and money and never lose paperwork again.

Construction
Manage your construction projects easily, ensuring that you bring them in on time and within budget.

Manufacturing
Control the entire process from sales order, purchasing, manufacturing and inspection through to delivery and invoicing.

For more information about how Opera 3 CRM can manage the lifeblood of your business, get in touch:
Tel: 0800 919 704
E-mail: info@pegasus.co.uk

Competitive trade-in discount available
Trade in your current solution and you could save **25% off Opera 3 RSP***

*Terms & Conditions apply

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