



# OM.Net Overview

## Modular CRM for the NFP sector

Engage and understand your members and contacts

**OM.Net** is a total CRM solution for the not-for-profit sector, empowering your organisation to achieve its contact engagement goals.

Using **OM.Net**, you can consolidate financial data, develop relationships and report on activities from one cohesive, modular solution.

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*“OM.Net makes us more efficient and effective communicating with our customers.”*

IHEEM, Membership Manager

The **OM.Net** multi-company features, allow you to compartmentalise your generated revenue for accounting and analysis across all the integrated modules.

**OM.Net** is versatile, function rich, configurable and flexible. Choose from optional modules to help with: online self-service, memberships, events, sales, CPD and more...



### **OM.Net Memberships**

Understand your members in more detail. Manage complex fee structures, grades, payment methods and installments. Powerful en-masse procedures for renewal, Direct Debits, reminders and lapsing.



### **OM.Net Events**

Manage your events and delegates whatever the size: free of charge registrations, through to chargeable multi-day, multi-streaming conferences & exhibitions, and everything in between.



### **OM.Net Analytics**

Interrogate the database with **OM.Net EasiQuery** for bulk emailing, data extracts, text messaging and mail merging. For analysis, **OM.Net Reports** delivers facts and stats through SQL Server Reporting Services.



### **OM.Net Sales**

Streamline your sales. Sell publications, services, downloadable content, educational materials, advertising and much more. Manage your product catalogue, stock and deliveries.



### **OM.Net Web Tools**

Integrate with your existing website. Give your customers the empowerment of self-service for all the major modules. Whilst keeping data synchronised real-time with **OM.Net**.



### **OM.Net Custom Modules**

**OM.Net** can go beyond standard configurations. Our commissioning process can equip your organisation with an exclusive module that works for you and integrates with **OM.Net** seamlessly.



# OM.Net Core

## Versatile CRM at the heart of OM.Net

### Modular CRM that adapts to all kinds organisations

OM.Net provides the complete functionality you would expect from a comprehensive CRM. Including: names, unlimited addresses telephone numbers, email addresses, mailing lists, committies, activity tracking, interests and even social media.

OM.Net Core integrates flawlessly with the other OM.Net modules. Providing you with the tools to acheive the ultimate goal of providing better customer engagement through relationship management.

### OM.Net Core makes managing organisations easier:

- **Maintaining data once.** Combine disparate and departmental systems into the consolidated OM.Net database to help avoid duplication.
- **Built-in financials.** Update your accounting system without rekeying.
- **Giving you detailed report outputs.** Interrogate your data better.
- **Engage your contacts.** Email, text-message and share data with Office.
- **Activity tracking.** Log and process your most important correspondence.



# OM.Net Core Key features

## OM.Net gives you greater customer understanding

Our modular approach helps you grow, whilst achieving better contact management so you can focus on your engagement and productivity.

Contact management is distinguished in **OM.Net** to support complex relationships. Contacts can be Individuals, Organisations or Individuals at Organisations. In **OM.Net**, Individuals can then be linked to other contacts within the database (such as couples or families). Also, Contacts can have additional links within one, or multiple organisations with different job titles, email, telephone numbers and other contact methods.

### **OM.Net helps you and your team with:**

- Contact management
- Activity tracking
- Marketing analysis
- Data Import / Export
- Mailing lists
- Bulk messaging via fax, email or SMS.
- Committee Management
- Word / Excel / Outlook integration
- Batch entry & financial transactions
- Invoicing, Credit, Receipts
- Store / scan / link emails to any record
- Payment processing. Cash, cheque, Direct Debit (paperless), Debit card, credit card, standing order, BACS and instalments.
- Nominal processing & Sales Ledgers. Update your accounting system.
- CPD tracking. Assign CPD points gained externally and expiry dates to Events / Products.
- Comprehensive reporting. Listing, analysis, and dashboard reporting.
- Sophisticated security. Granular control for users and user groups.

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*“OM.Net is versatile & robust, basic tasks are easy to learn.”*

ISM, Membership Manager



# OM.Net Events

## Audit and maintain bookings

**Comprehensive, flexible and specifically for not-for-profits**

**OM.Net Events** provides a complete event management solution. It's cohesive with **OM.Net Memberships**, and because we have developed all the modules together with the rest of **OM.Net**, it is a cost effective solution that's flexible, yet comprehensive.

With **OM.Net Events** you can manage whatever your members wish to book on to. These can be training courses, workshops, seminars, conferences and exhibitions, without restrictions.

Setup chargeable events or free ones with simple registration, or complex configurations for multi-day, multi-streaming, multi-venue conferences – including accommodation and concessions.

### **OM.Net Events – multi-company specific features**

Simultaneously manage your event bookings and audit independent, revenue generating companies together, whilst sharing the same core contact data to avoid duplication or rekeying.

# OM.Net Events features



**OM.Net Events** is a cost effective way to manage your bookings. Setup concessions, invoicing and auditing, all within **OM.Net**.

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*“OM.Net makes it easy to find what you are looking for”*

MENSA, Events & Membership Manager

**OM.Net Events helps your team with:**

- **Bookings** on behalf of groups of people, individuals or organisations.
- **Delegate category types.** Associate fees, members, non-members, & participants.
- **Time-critical fees** & early bird discounts.
- **Special Concessions.** Dietary needs, and access requirements can be logged.
- **Changes & Cancellations.** Move delegates or provide a credit or refund (in-full/partial).
- **Joining info,** seating plans & place names.
- **Built-in auditing features** manage your booking statuses, invoices, payments & balances outstanding.
- **Profit and loss summaries.** Separate each event into easy to read subtotals.
- **Multiple attendees** attending sessions can be group booked, or individually.
- **Versatile workflow.** Delegates can be booked and payment taken, or an invoice raised via the desktop client, or you can choose a modular upgrade to **OM.Net Web Tools** so your customers can use their web browser to self-serve.



# OM.Net Memberships

## Adaptable Subscription Management

**Configurable and flexible for your team and customers**

OM.Net Memberships seamlessly extends OM.Net, giving you a configurable, flexible system to manage your subscription structures.

Memberships can be maintained for individuals or organisations and can be processed in a wide variety of ways, helping you manage complex fee structures and grades, and with special organisational requirements, OM.Net can be configured to meet exacting criteria.

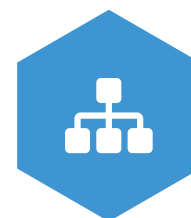
### **OM.Net Memberships – multi-company specific features**

Simultaneously manage your schemes and audit independent, revenue generating companies together, in one cohesive system.

### **OM.Net Memberships can improve:**

- **Retention rate.** Automatic billing with Direct Debits can encourage renewals.
- **Simple statements.** Quickly assess who owes you money & who has paid.
- **Discount pricing.** Manage early-bird fees and special group discounts.
- **Add-on support.** Magazine subscriptions, insurances and optional extras.
- **Invoice processing.** Multiple, flexible ways to administrate invoices.

# OM.Net Memberships features



**OM.Net is cohesive and can be configured to your needs**

**OM.Net Memberships** integrates flawlessly with the **OM.Net Core** as well as each of the other **OM.Net** modules to provide your organisation with an easy-to use function rich, flexible software solution which will fit into your organisation seamlessly to manage your membership grades and schemes.

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***“OM.Net is  
reliable, flexible  
and easy to use.”***

PTA-UK, Membership Manager

**OM.Net Memberships** features:

- Bulk and individual renewals / lapses
- Early payment discounts
- Range based fees
- Reminder processes
- Set of standard membership reports
- Aged debtor and account statements. Audit your subscriptions.
- **Payment combinations.** Joint, linked, or payed by another organisation.
- **Variations of installments.** Configurable monthly, quarterly, yearly or bi-annually.
- **Process Direct Debits.** AUDDIS/ADDACS validate member's payments quickly.
- **Document automation.** Renewal or reminder letters, pro-forma invoices and VAT documents can be dispatched.
- **Versatile workflow.** Members can be joined, renewed and payment taken, or an invoice raised via the desktop client, or you can choose a modular upgrade to **OM.Net Web Tools** so your customers can use their web browser to self-serve.

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# OM.Net Analytics

## Introducing Reports and EasiQuery

**Filter data on-screen and print for better decision making**

**Business intelligence is hard enough – we simplify things**

With our helpful analytics tools, **OM.Net Reports** provides standard tools for traditional reporting tasks, and **OM.Net EasiQuery** delivers a versatile way to refine your criteria, automate bulk tasks and inspect your marketing data in granular detail.

**OM.Net Reports configured for you to get to grips with your data**

The standard reports that ship with each **OM.Net** module provide a plethora of information from simple listings and outputs, through to financial interrogation for data analysis with your accountant.

**OM.Net EasiQuery for productivity boosting automation**

Helping your team sort complex criteria and create dynamic lists to handle nearly, any situation. With **OM.Net EasiQuery**, you can extract information for marketing purposes, display customised reports and produce en-masse content for mail-merge, bulk SMS or postal mail-outs, all from one interface.



# OM.Net Analytics in more detail

## Choose how to take your organisation to the next level

For admin staff and data interrogation professionals, **OM.Net Analytics** helps your team perform data intensive, complex tasks effectively

### Configuration & advanced coaching

Depending on your goals, you can have everything pre-configured to meet your needs or take things further. Beyond basic training, your team can have advanced coaching to really grasp the power of **OM.Net** and *SQL Reporting Services*.

### Implementation

**OM.Net EasiQuery** has a range of pre-defined “selections” to easily start inspecting your data, and for your technical staff, the **OM.Net** database supports *ODBC* and *OLEDB* connectivity so any popular querying tools, such as *Microsoft Access* or *Excel*, *Crystal Reports* or *Impromptu* can be used together with **OM.Net**.

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*“OM.Net effectively underpinned the processes which enabled BPIF to win Trade Association of the Year!”*

BPIF – IT Manager

**For System Administrators and power-users, OM.Net EasiQuery has broad scope:**

- Copy existing, pre-defined selections and turn them into tools of choice.
- Configure everything to suit your organisation’s routine and include your most intensive tasks.
- Add and amend filtering criteria.
- Change user prompts and input styles.
- Add or remove fields from forms.
- Add, amend or remove sort orders.
- Configure the report designer.
- Assign advanced user permissions.



# OM.Net Sales

## Secure and adaptable trading solution

### OM.Net Sales is a new channel to engage your contacts

OM.Net Sales has been developed so your team can administer sales and CRM data together. Maintain and dispatch inventories of goods and services, produce relevant documentation and cope with a variety of complex delivery and payment scenarios, configured to your needs.

### OM.Net Sales delivering your mix of goods and services

Handle tangible product inventories such as, publications and education material, or sell intangibles, for example, billable hours, downloadable content, and even advertising. You can even manage different billing and delivery addresses, all from one cohesive solution.

### OM.Net Sales is designed for multi-company administration

Multi-company features permit your team to perform sales and collect payments for independent organisations that have separate financial accounts. OM.Net can reduce your overheads, because the underlying database shares the same contact data, you avoid duplication, rekeying, and learning different, disparate systems.

# OM.Net Sales key features



## Leverage contact data and sales data in one unified solution

**OM.Net Sales** helps manage product inventories, complex delivery rules and provide a new source of data to analyse contact behaviour.

### **OM.Net Sales provides customers:**

- **Staged order fulfilment.** Reassure valuable customers with: Basket, Checkout, Summary, and Billing stages.
- **Different payment methods.** Handle phone orders, cash or online transactions.
- **Complex payment rules.** Permit a contact to have an organisation pay on their behalf using a payment reference.
- **Complex delivery rules.** Permit a contact to transact with convenient, separate billing and delivery addresses.
- **Accurate delivery note production.**
- **Discounts, and clear pricing.**

### **OM.Net Sales provides your team:**

- **Free text, or explicit record searches.**
- **Manage inventory, deliveries & return policies.** Tailored to your business rules.
- **Product category based stock control.**
- **Member / non-member pricing.**
- **Banded pricing** ideal for bulk purchasing.
- **Analyse margins** with side-by-side cost of sales and product costs.
- **Transaction history,** audit & report sales.
- **Granular accountancy detail.** Configure product nominal codes and separate VAT rates for postage or overseas shipping.
- **Payment provider configuration.** Choose from: Sagepay, Worldpay or, your own 3rd party payment provider.
- **Versatile payment methods.** Invoices can be raised within **OM.Net** directly or, if implemented, customers can self-serve using the **OM.Net Web Tools** features from their browser.
- **Smart feature for media buyers.** Process advertising orders using our helpful text fields that give you instant feedback.

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*“The **OM.Net** platform integrates seamlessly with other systems and applications...”*

ECIA, Membership and IT Manager



# OM.Net Web Tools

## Self-service enablement

### Improve member retention and online participation

The **OM.Net Web Tools** are a cost effective way to empower your contacts to self-serve from within your new, or existing website. Developed as a framework of templated pages, **OM.Net Web Tools** give your contacts online access to maintain their details, whilst connecting to the **OM.Net** database – without 3rd Party development, or complicated procedures for your webmaster.

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*“OM.Net is very adaptable.  
I particularly like the  
Web Tools integration,  
it’s a life saver!”*

PBFA, Membership Manager

Built upon the **OM.Net Web Service**, these templates are designed to be embedded within your website and inherit the look & feel so that you do not have to overhaul or replace your existing site.

# OM.Net Web Tools Key features



## Self-service empowerment helps keep your CRM up-to-date

**OM.Net Web Tools** gives your contacts the freedom to manage their own information

### **OM.Net Web Tools for contact details:**

- **Individuals**, contacts can maintain their own correspondence details.
- **Organisations**. Designated people can maintain their contact correspondence on behalf of their Organisation.
- **Committee management**. Individuals can update Organisations and Committees that they belong too.

### **OM.Net Web Tools online directories:**

- **Member searches**. Permit people to look at other member's details from the **OM.Net** database.
- **Narrow search results** by a contact's specialisms, or products and services that they offer.

### **OM.Net Web Tools for memberships and events:**

- **Register / Join / Renew**.
- **Contacts can create accounts**.
- **Secure login**. Checks for active memberships, if required.
- **Book onto Events**, manage concessions.

### **OM.Net Web Tools for transactions:**

- **Capture contact preferences**.
- **Capture Direct Debit details** early in the registration process and help with member retention and billing.
- **Capture documents**. Recieve proof of ID, Qualifications or CPD details with simplified file uploads. These are saved directly into the **OM.Net** database.
- **View outstanding balances**.
- **Pay membership / subscription fees**.
- **Ad-hoc purchases**. Take payment for publications, periodicals or courses.
- **Online merchant tools connectivity**. Via bespoke commissioning process.