



2011  
Clarity Software  
**ugm**

*Celebrating 10 Years of Clarity*

[www.clarity-software.com](http://www.clarity-software.com)

**clarity**  
SOFTWARE™

# Welcome!

## Clarity Software

Richard Gamlin  
Emerson Welch  
David Steward  
Saf Ahmed  
Scott Banks  
Raj Mann  
Becky Wilkins  
David Moxon  
Toby Groves  
Matt Moxon  
David Pay  
Andrew Brown

Managing Director  
Marketing Manager  
Development Manager  
Sales Manager  
Installation & Training Manager  
Marketing Assistant  
Customer Account Manager  
Software Developer  
Software Developer  
Installation & Training Engineer  
Support Technician  
Support Engineer



Russell Weller  
Stuart Fox

# Today's Agenda

## Clarity Software

- 10.00 Welcome
- 10.05 Clarity Professional v4 Overview
- 10.30 Powerful New Job Costing, Stock and BOM
- 11.00 Coffee, Skills Centres & Networking
- 11.45 Improving Customer Service With Our Website
- 12.00 What is e-Marketing?
- 12.10 Lunch, Skills Centres & Networking
- 13.00 Clarity Marketing
- 13.45 10 Years of Clarity & The Future
- 14.00 Open Q&A Forum
- 14.30 Skills Centres & Networking
- 16.00 Close

# Company Structure



# Special Promotion



*Save £250!*

**£250 DISCOUNT OFF EVERY ON-SITE TRAINING DAY WITH THIS VOUCHER**

Terms and Conditions  
Orders must be received by Friday 21st October. Possession of voucher or voucher code must be disclosed at time of purchase to redeem the offer and presented at the training session specified. Clarity Software reserves the right to withdraw this offer at any time. VAT at the applicable rate applies. You agree to be bound by these terms and conditions.

Quote code **UGM2011** on order

# TODAY ONLY!

(ORDERS MUST BE RECEIVED BY FRIDAY 21<sup>ST</sup> OCTOBER)

# Let Clarity Promote Your Business

Provide us with a **video or written testimonial** and we will return the favour to you by offering exposure in our:

Website [Brochures](#) Social Media [Advertising](#) Direct Mail  
Exhibition Stands Press Releases

Just ask some of our existing customers:

**Green Graphics**  
**Data Image Group Ltd**  
**Hollywood Monster**  
**Prosign Print & Production**  
**Morgan Signs Ltd**  
**BD Signs**

(SPEAK TO RAJ MANN DURING THE BREAK FOR MORE INFO)



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V4 OVERVIEW

**David Steward**  
Development Manager

# Since 2010 UGM

## Clarity Professional v4

- 80% of customers now using it
- 12 releases
- 50+ new features
- 100+ minor fixes
- Latest v4.0.6.2

V4.1 NEXT

# Clarity v4 2011 key features

## Six major features

### MARGIN & MARKUP

- Use either
- Available all ways to populate a quote
- Ensure minimum profit
- Hoping to add into quote/wizard grids

# Clarity v4 2011 key features

## QUOTATION AMEND MODE

- Available for all confirmed jobs
- No more multiple prompts
- Full amendment history kept
  
- User field wrapping on quotes screen
- Automatic Part Code generation

# Clarity v4 2011 key features

## AUTO PRODUCTION SCHEDULING

- Huge time saving
- Production module feature available to all system users
- Provide instant delivery estimates for customers

# Clarity v4 2011 key features

## DELIVERY SCHEDULING

- Plan delivery of large scale jobs over several weeks
- Deliver to multiple sites and contacts
- Specify delivery method
- Helps project management visibility
- Still super fast
- Report by Company or Date

# Clarity v4 2011 key features

## INTERNAL ORDERS

- Initial setup
- Make for stock
- Make from requisition
- Share purchases and internal orders on a job
- Chain internal orders together

# Clarity v4 2011 key features

## GOODS & STOCK IMPROVEMENTS

- Costs in the BOM/BOL
- Checks when picking / booking in / transferring
- Only valid items / locations are available
- Book in from Job
- Ready for new Cost Analysis

# Clarity Professional v4.1

## Biggest release of the year

Single draft, BOM & current version

### New Cost Types

- Resource
- Outsourced

### Costs in the BOM & BOL

- Historical record of costs

### New Cost Analysis module

- Job Costing
- Expenses

RELEASE DATE: **NOVEMBER 2011**



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NEW COST ANALYSIS

**Richard Gamlin**  
Product Director

# Cost Analysis

**ANALYSE** group of jobs & individual job

- Estimated vs Actuals
- Pie Chart by Cost Types

**ENTER 'EXPENSES'** as Actual Cost

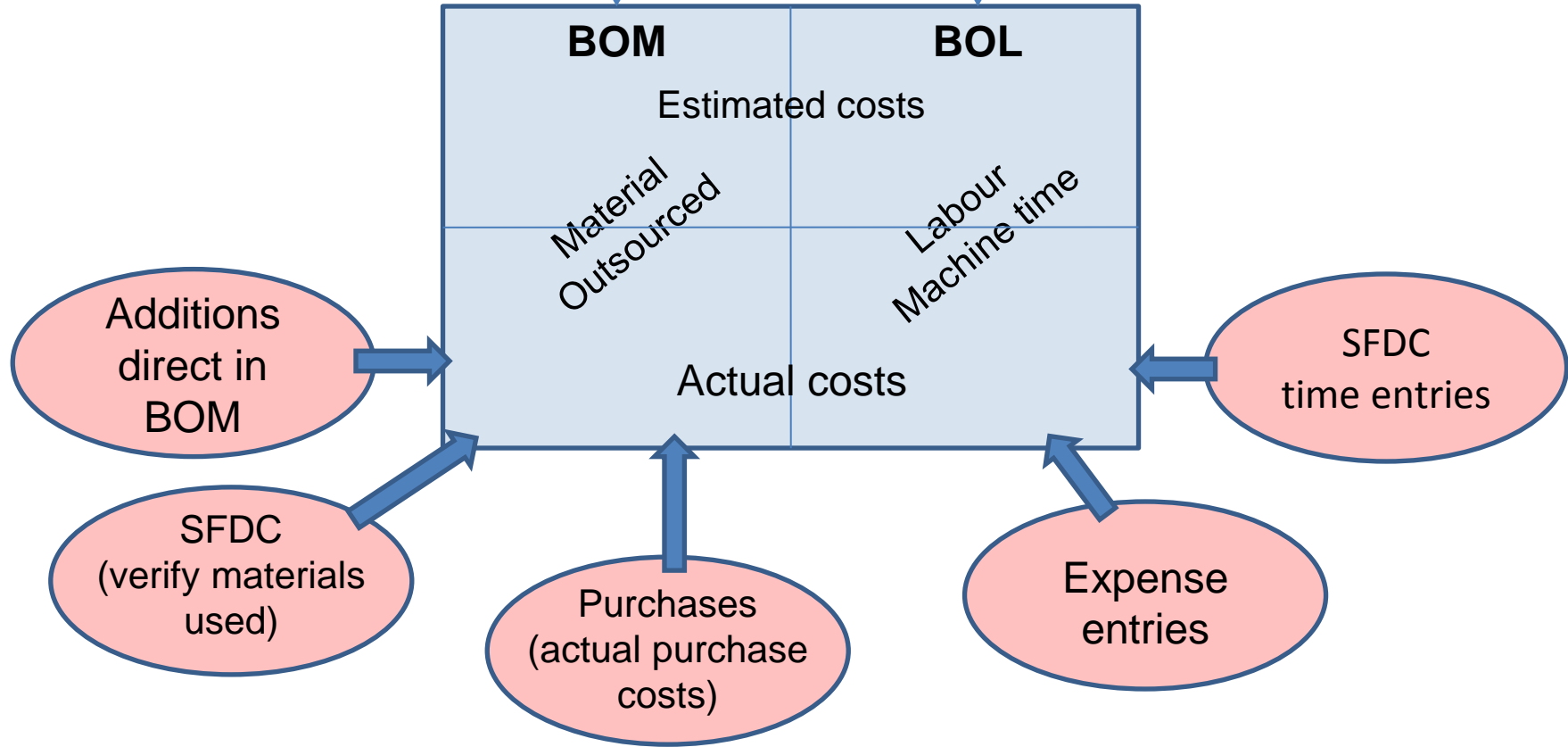
Timesheets & sundry expenses

- By Job (as now)
- By Employee (new)

# Cost Sources

## Quote/Job

- Enter Item
- From Price List
- Price Wizard
- Assembly Wizard
- Calc Wizard





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NEW WEBSITE ENHANCEMENTS

**David Steward**  
Development Manager

# clarity-software.com

NOW BIGGER THAN EVER

18,000 visits per month

Great new content every week

- Twitter feed @ClarityPro
- White papers
- Case studies
- Tutorial videos (really popular!)

My Account

- Supported & unsupported users

# My Account

Software upgrades

Update your details

Help & Support

- Raise a support call
- Upload a file
- Remote assistance

My Software

- Buy licences online

# Software upgrades

## Downloading upgrades

- Latest version & archive of recent versions
- Release notes
- Upgrade Code

# Update my details

[Address details](#)

[Reset password](#)

[Additional users](#)

- Adding
- Activation
- Permissions

# Help & Support

## Support Calls

- Add new
- View status and owner
- View history

## Upload a file

- You Send It

## Remote Assistance

- Team Viewer

# My Software

## Current licences

### Add new licences

- Preview prices before purchasing
- Add Support Contract
- View history

## Confirm order

### Activation & payment

- Rental is automatic via DD
- Purchase is via invoice

## Live today

# Future improvements

## Coming soon...

- Update a call via the website
- Live Chat
- Download latest Calc Wizards
- More help videos

What would you like to see?



WHAT IS  
**E-MARKETING?**

**Emerson Welch**  
Marketing Manager

# In a nutshell...

**It's marketing activity that's conducted on the Internet**

Includes:

- Email
- Website
- Social Media e.g. Blogs, Twitter, Facebook
- Video and Voice
- Pay Per Click (PPC) Advertising e.g. Google AdWords
- Search Engine Optimisation (SEO)
- Display and Placement Advertising
- Mobile Phone Advertising
- Display Advert Re-Marketing

# What is it used for?

- Creating a virtual shop window for our business
- Brand image and positioning
- PR
- Generating leads
- Building relationships
- Gaining referrals
- Making direct sales
- Having conversations e.g. Skype, VOIP, instant messaging
- Delivering information
- Storage
- Customer service

**Everything you need is potentially on the internet**

# Why should we do it?

**Because in marketing terms it's simply a no-brainer.**

- Anytime, any place, anywhere
- Low risk – you're in control
- It can be automated
- Instantly measurable
- Easy to build opt-in databases
- Highly targeted
- Best quality leads
- Ultra-fast ... results arrive in seconds
- Huge volume potential
- Deliverable to smart phones, tablets etc.

And best of all ... it's **LOW COST**.

# Email marketing

## Why is it so effective?

It improves communication, improving your **SERVICE**.

- Despatch confirmations
- Maintenance updates
- Sales promotions
- Stock notifications
- Installation bookings
- Return acknowledgements
- Training calendars
- Thank you messages
- Invitations to events
- Links to free documents or press articles
- Customer newsletters
- Survey invitations

And it makes you **greener**...

# Compare email to direct mail

## Direct Mail Costs

Design & copywriting time  
Paper  
Printing  
Envelopes  
Stamps  
Stuffing time  
Delivery time

Have they received it?  
Did they open it?  
Did they act upon it?  
Did they tell a friend?

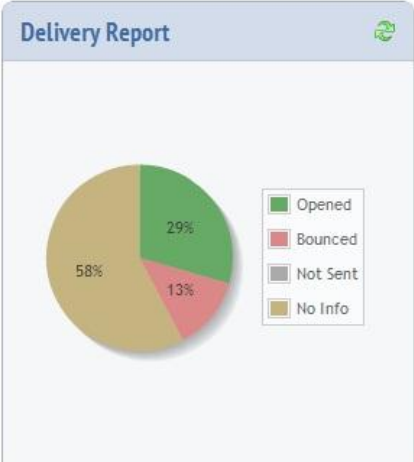
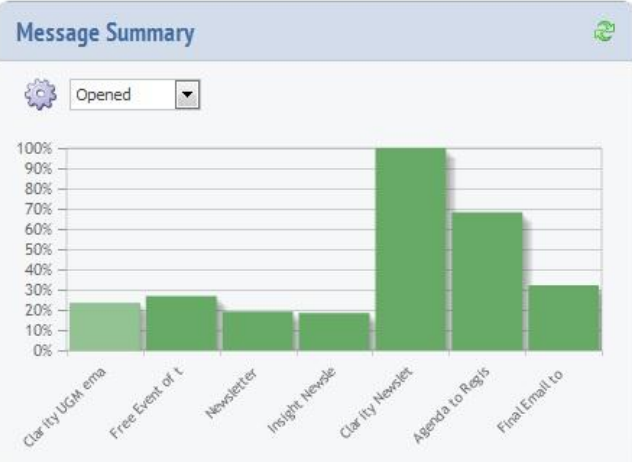
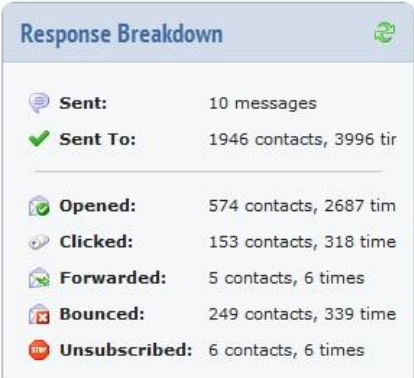
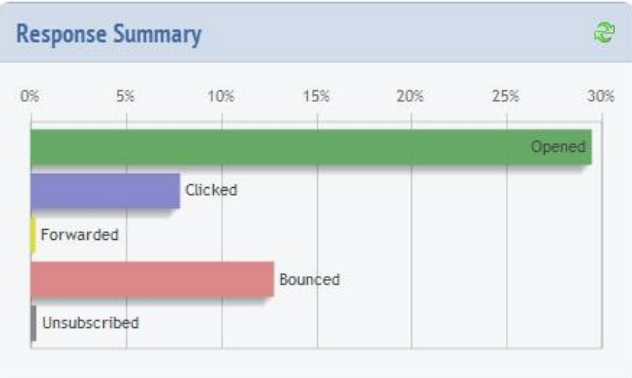
## Email Costs

Design & copywriting time  
Paper  
Printing  
Envelopes  
Stamps  
Stuffing time  
Delivery time

They received it.  
They opened it.  
They acted upon it.  
And they forwarded it.

# Campaign reporting

## Last 30 Days Activity



No offline campaign returns this level of detail

Where do I start?

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E-MARKETING IS EASY!

Find out after lunch

**E-MARKETING IS FUN!**



PRODUCT OVERVIEW

**Emerson Welch**  
Product Director

**David Moxon**  
Product Developer



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MARKETING

free trial at [www.clarity-marketing.com](http://www.clarity-marketing.com)

## Help!

- I need more sales leads
- My contact database is in a right mess
- My customer communications are not good enough

But...

- I don't have a large budget
- I can't take commercial risks
- I'd rather not increase my service personnel



**NO RISK GUARANTEED**

# You need Clarity Marketing

- Import and easily cleanse your data (at last!)
- Segment highly targeted lists
- Manage online and offline campaign activity
- Create and publish personalised branded emails
- Analyse the opens, clicks, forwards and response times
- Automate service messages to selected customers
- Closely maintain your opt in subscriptions
- Quickly create new target lists from previously published emails
- Generate massive sales revenue increases on a shoe string

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free trial at [www.clarity-marketing.com](http://www.clarity-marketing.com)



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PRODUCT DEMO



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**E-MARKETING IS FUN!**

## Pricing & Purchasing

- From just £10 per month!
- Choose a tariff based on number of contacts and email sends
- Simple monthly rolling contract terms
- Automated pay per month in advance via credit or debit card
- Runs separately to your Clarity MIS contract
- Upgrade options for tariffs, credit boosts and image library storage



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10 YEARS OF CLARITY  
&  
THE FUTURE

**Richard Gamlin**  
Managing Director

# 10 years of Clarity



**Clarity Professional [David Steward]**

File View Contacts Help

Contacts Activities Marketing Price Lists Quotes / Jobs Purchase Orders Cost Analysis A/C's Post to Accounts Reports

Home

Contact: David Steward    Forename: David    Type: Main

Company: Beta Test Company    Surname: Steward    Group: [dropdown]

Address: 7 The Pavilions    Job Title: [dropdown]    Bus. Type: [dropdown]  
Cranmore Drive    Dept.: [dropdown]    Key Product: [dropdown]  
[text]    Salutation: [dropdown]    Lead Source: [dropdown]

City: Solihull    Phone/Ext: [text]

Country: [text]    Fax: [text]

Postcode: [text]    Mobile: [text]

Country: United Kingdom    Email: [text]

Reg. No.: [text]    Payer: [text]    Currency: British Pounds Sterling

VAT No.: [text]    Home: [text]    Created: 14/10/2011 12:51:19

Website: [text]    Email (2): [text]    Modified: 14/10/2011 12:51:19

Acc. No.: [text]    Employees: [dropdown]

Password: [text]    SalesDis%: 0

Note: [text area]

Search for [text] by Company [dropdown]  
Group: <All>    Reset

Forename	Surname	Company	Telephone	Mobile
David	Steward	Beta Test Company		

# The future

## COMING NEXT

- Release v4.1
- Accounts integration
- Split packs & off-cut stock
- SFDC changes

# The future



**THE CLOUD**

# The future

## SERVER BASED (not local)

- Release v4.1
- Accounts integration
- Split packs & off-cut stock
- SFDC changes

## CLARITY MARKETING

- Our 1<sup>st</sup> true web app

## POD

- Remote worker integration

## WEB BASED CRM



OPEN

# Q&A

FORUM



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THANKS FOR COMING



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