Functionality Checklist

CRM - Comprehensive customer and supplier database:
- ⚔ manage contact and marketing information of customers and suppliers
- ⚔ compose target audience groups and send e-mail newsletters
- ⚔ use integrated e-mail client, document business conversations, meetings and calls
- ⚔ make a list of employee roles and grant permissions to each role
- ⚔ use reminders to do things before you forget them
- ⚔ retrieve any lithuanian based company data from rekvizitai.lt *)
- ⚔ comprehensive database of world countries, regions and cities *)
- ⚔ GDPR consent management, personal data reports and personal data removal tool *)

Logistics order administration:
- ⚔ search carriers by serviced countries
- ⚔ prepare customer offers based on templates made in advance and send offers by e-mail
- ⚔ input comprehensive order data: delivery conditions, load and truck data, make up a route using intermediate loading/unloading points
- ⚔ print template-based contract with a customer and a carrier
- ⚔ evaluate every single project profitablity on a single screen

Customer billing and performance analysis:
- ⚔ prepare customer invoice in one click based on order data using invoice templates
- ⚔ customize invoices by choosing desirable detalization level and adding notes
- ⚔ send PDF invoice to a customer using integrated e-mail client
- ⚔ fully automate invoice generation and sending using automated billing capability
- ⚔ analize performance and trends using two and three-dimensional analysis tool

Business accounting:
- ⚔ customize SAF-T chart of accounts, use General Ledger and general journal
- ⚔ automatically generate operations based on predefined rules
- ⚔ manage purchases, sales and payments, enjoy automated payment allocation
- ⚔ use wage registry, petty cash vouchers, cash book, cash income and expense orders
- ⚔ calculate depreciation of fixed assets
- ⚔ use month and year close procedures, prepare financial reporting documents
- ⚔ integrate bank payments by exporting/importing ISO 20022 XML files *)

*) Optional add-on modules

Deployment methods: Internet server; On premises server; Standalone Windows PC
End user devices: Windows PC; any PC/tablet/phone with Internet browser
User Interface: English, Spanish, Lithuanian, Russian

+ Customize the system according to your business needs!