

**Fleet Business Management System
ISPC Planner 2022**

Functionality Checklist

CRM - Comprehensive customer and supplier database:

- ▲ input customer passport, driving licence, identification card and contact data
- ▲ 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 *)
- ▲ GDPR consent management, personal data reports and personal data removal tool *)

Fleet management order administration:

- ▲ vehicle classification, service, insurance, technical inspection and other data
- ▲ prepare customer offers including one or multiple cars per offer
- ▲ calculate car maintenance expense for rent duration
- ▲ prepare payment schedule using annuity method
- ▲ use integrated graphical week or month spanning reservation time-table for visual convenience
- ▲ print template-based contract or payment schedule for a customer
- ▲ print daily or weekly plan listing all pick-ups and drop-offs ordered by time

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
- ▲ analyze 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 or Lithuanian

+ Customize the system according to your business needs!