

**Fleet Business Management System  
ISPC Planner 2018**

---

**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 news-letters to the whole group at a time
- ⤴ use integrated e-mail client, document business conversations, meetings and calls
- ⤴ print mailing labels, full-text search all parties by any field
- ⤴ make list of employee roles and assign system security privileges for each role
- ⤴ use reminders to do things before you forget them

**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 turnover analysis:**

- ⤴ prepare customer invoice in one click based on order data
- ⤴ use invoice templates in single/double currency, single/double language
- ⤴ achieve desirable invoice detalization level by joining or expanding invoice lines
- ⤴ prepare and use standard billing notes for all and for specific customers
- ⤴ send PDF invoice to a customer by e-mail
- ⤴ use long-term invoice data to generate turnover and comparative analysis reports

**Business accounting:**

- ⤴ design your own chart of accounts (or modify one of the two offered templates)
- ⤴ use General Ledger, operation templates, general journal and corrections
- ⤴ generate operations based on all pre-selected period documents
- ⤴ print purchase and sales invoices
- ⤴ register payments (both receipts and disbursements)
- ⤴ use wage and authorship salary accounting registry
- ⤴ print debt reports, use account closing procedures
- ⤴ calculate of depreciation of your fixed assets
- ⤴ print petty cash vouchers, cash book, cash income and expense orders
- ⤴ prepare financial reporting documents

**Deployment methods:** ISP datacenter; 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 needs!**