

**Logistics Business Management System
ISPC Planner 2018**

Functionality Checklist

CRM - Comprehensive customer and carrier database:

- ✦ maintain people and organizations contact information of customers and carriers
- ✦ 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

Logistics order administration:

- ✦ search carriers by serviced countries and rates
- ✦ 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 profitability on a single screen

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!