

**Translation Business Management System
ISPC Planner 2021**

Functionality Checklist

CRM - Comprehensive customer and translator database:

- ▲ manage contact and marketing information of customers and translators
- ▲ 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 *)

Translation order administration and project management:

- ▲ search translators by languages, rates, experience, specialisation and software skills
- ▲ input special customer and translator rates by language, work type and specialisation
- ▲ select orders and work efforts by customer/translator, status and dates
- ▲ evaluate every single project profitability on a single screen
- ▲ review ordered projects in both customer and supplier prices
- ▲ attach translation-related files (such as original, edition, final translation) to each project
- ▲ generate a DOCX formatted contract with translator based on template made in advance

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-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!