

**Translation Business Management System
ISPC Planner 2018**

Functionality Checklist

CRM - Comprehensive customer and supplier database:

- ⤴ maintain people and organizations contact information of customers and translators
- ⤴ 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

Translation order administration and project management:

- ⤴ search translators by languages, rates, experience, specialisation and software skills
- ⤴ input special customer and translator rates by language and work type
- ⤴ 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 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!