

Business Management Software

Features and Capabilities:

Services Order Management

- Generate work order reports
- Schedule work orders and services
- Auto-Bill / Invoice completed work orders

Project & Contract Management

- Manage activities to meet project/contract goals
- Link activities to projects/contracts
- Track contract values, associated costs & profit margins
- Track invoices, payments and expenses per project

Timesheet & Expense Tracking

- Record electronic timesheets
- Automatically track time against projects
- Track billable vs. non-billable time
- Track reimbursable expenses

Time-Billing & Recurring Billing

- Instantly invoice billable time
- Auto-generate recurring invoices
- Mass-Invoice

Product & Pricing Management

- Manage product costs and prices
- Track Product Line profitability
- Track Inventory

Management Reports

- Access over 130 Standard Reports
- Build your own reports
- Import & Export data
- Organize & display Data Management Center info

Advanced Searches & Views

- Conduct basic and advanced searches
- Find records based on "sounds-like" spelling
- Save common searches for easy access and re-use by staff

Invoice & Payment Management

- Easily convert quotes into invoices
- View, edit, print or email invoices
- Record payments against invoices

Contact Management

- Track an unlimited number of contacts
- Attach files to any contact or appointment
- Integrate with Outlook to send emails or save contact info

Calendar & Scheduling

- Instantly view appointments and to-do lists
- View & schedule activities on all employee calendars
- Link activities to customers and sales opportunities
- Notify others of scheduled appointments
- Automatically trigger a process

Sales Force Automation

- Generate Quotes and Estimates
- Analyze and track lead sources and their profitability
- Measure sales performance against quotas
- Generate Graphs and Charts

Marketing Management

- Generate letters, emails & forms with contact info
- Track the profitability and expenses of campaigns

Personal & Company Customization

- Customize each user's Home Page and usage based on their role & preferences
- Create company-specific drop down menus
- Add company-specific field names to screens

Tools & Security Management

- Set up Group-Level Security with Modify, View-Only & No Access to records or modules
- Restrict certain users to assigned records only
- Use the Start-up Wizard for easy & rapid deployment

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