



## Proposal

# Requirements

- Link from existing website(s) via Login Screen
- Business has multiple unique brands
- Responsive / Mobile friendly interface design
- Record Management System
- Facility to export all data to CSV file
- SMS Texting
- Barcode reader incorporated
- Time Management
- Stock Management
- Raise a Ticket process

# Client Process

- Register from existing website
- Request Ticket
- Confirm Ticket response
- Assign Ticket status to job list
- Action Job
- Advise Client when completed
- Issue Invoice
- Collect Payment



# Features of Solution

## Change Request

- Customers can request a change (eg: change spec of PC). Change Requests appear for tracking and billing.
- Restrict customers to a certain number of changes per month.
- Email notifications on Change Requests.

## Email and Web Support Ticketing

- Fully functional email support tickets.
- Import mail via POP3/IMAP.
- Create ticket numbers.
- Autoreplies.
- Assign tickets to support staff members.
- Reply via email or web.

# Features of Solution cont...

## PDF Invoicing

- Convert invoices into PDF documents.
- Email PDF Invoice to your customer straight from the system.
- Full control over invoice template layout.
- Send PDF invoices marked as “overdue” or “paid” as well.

## Automatic Invoice Renewal

- Choose an Invoice Renewal Date
- Software will email automatic PDF invoice renewals and overdue invoice reminders.
- Cool!

# Features of Solution cont...

## Calendar

- A great easy to use Calendar for organising your business. (Similar to Google Calendar.)
- Create events, assign Customers and Staff members.

## Email Newsletters

- Send bulk email newsletters to groups within your system (eg: Customers, Members, Recently Completed Jobs).
- Template editor.
- Bounce, unsubscribe and link click tracking.

## Encrypted Fields

- Using industry standard RSA/AES technology you can encrypt and decrypt sensitive data (eg: Client website FTP details).
- With client side cryptography the sensitive data never even leaves your computer.

# Features of Solution cont...

## Task Timer

- Create a Customer Job, add some Tasks to the Job, click the “start timer” icon and away you go.
- Option to run multiple task timers at once.
- See active timers from any page within the system.

## Automatic Subscriptions

- Create Subscriptions and assign them to Customers.  
(eg: 6 Months server rental)
- Automatically generate an email a PDF invoice to the Customer.
- Follow up with overdue notices when needed.



## Other Features include ...

- On Line Payments
- Mobile Device View
- Customer Sign Up
- Option to set selected user views
- Bookmark a current Job(s)
- Create a FAQ page for your registered users
- Collect Job Deposits
- Track your income and expenses
- Set Membership Subscriptions
- All customers to comment on job
- Renewable Jobs and Invoices
- Send quote to customer for pre-approval
- Customers can upload files
- Your bespoke dashboard
- Import / Export CSV files
- Staff / Customer Login
- Template Editor for mail outs etc
- Assign Tasks / Jobs



# New Features to be added soon ...

## SMS Text Messaging

- Sending your messages using the Email to SMS protocol are free.
- Messages you send will come from your email address, not your phone number. You may also be limited to less than 160 characters, depending on your mobile phone carrier.
- A third party add-on will be required if you wish them to be sent from a telephone number.

## Barcode Printer / Scanner

- You will be able to produce a label based on the job reference
- The software will have the ability to scan in (using a scanner) the code and call up the customer record.