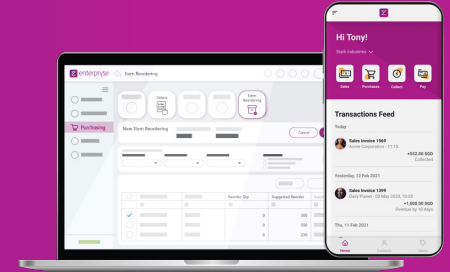




# Feature List

## Omni Channel Sales Management

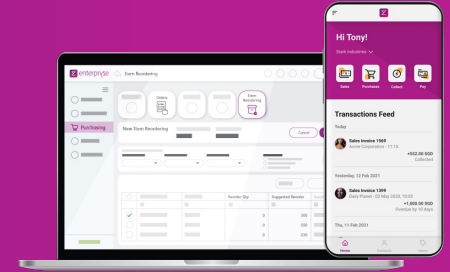


Customer Records	Store All customer data to get a 360 view
Aged Receivables	Understand how much your owed and what future commitment looks like
Sales Quotes	Track and Send Quote to customers to ensure Accuracy
Sales Orders	Commit Stock, Services and Production orders to customers
Deliveries	Manage Deliveries to Customers and deplete stock in real time as with automatic Journals
Credits & Returns	Track Credits and Returns with stock management and Automatic journals
Sales Receipts	Take payments on mobile apps, Portal and based on remittances on invoices
Delivery Planning	Use the resource scheduler to plan and assign deliveries to customers
Reserve Invoices	Create invoices before delivery to accurately post to the general ledger
Re-occurring Sales	Create re-occurring sales transactions for repeat orders and invoices
Transaction Consolidation	Merge multiple sales transactions into one to simplify deliveries and invoices
Split transactions	Take a single transaction and split it across multiple transactions
Emailing	Send individual transactions or send batches of transactions to customers
Dashboards and reports	Comprehensive dashboards and reports to provide deep knowledge of business performance
Multi Currency	Set Customers currency or build foreign currency price lists
Activities	Tag transactions with activities to create workflow, notes or reminders
Relationship Map	See the link from Quote to Cash
Outlook Integration	Create new customers and activities directly from Outlook
Copy from and To	Copy individual lines and quantities from base transactions and copy to target transactions
Order to service	Create and schedule service tasks from an order
Quote Approval	Send electronic Quotes to customers for approval
Notifications	Get real time notifications on sales transactions
Stock Levels	See stock levels in multiple warehouses and the free, committed and available quantities
Production Orders	Create orders for customers that need to be manufactured
Attachments	Add attachments to documents to centralise data
Custom Fields	Add additional fields to capture important information
Multiple Price lists	Create multiple prices lists in different currencies and assign to customers
Duplicate transactions	For template transactions & repeat transactions
Gross Margin	Track Gross margin at line level based on Moving Average, Actual, price list & last purchase price
Omni channel sales	Connect Shopify, Square and other websites to sell via multiple channels
Sales Analysis	Get detailed analysis on product and customer sales revenues and margins
Back 2 Back	Create Purchase Orders from sales orders for non stocked items
Mobile Apps	Take sales on the road with a choice of Apps
Delivery	Schedule deliveries to customers and stock in vans with deliver mobile app
Statements	Email or Print batches of statement for customers



# Feature List

## Business Spend Management

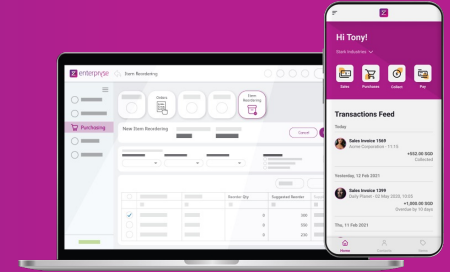


Supplier Records	Store All Supplier data to get a 360 view
Aged Payables	Understand how much you owe
Requests	Submit requests for Order without selecting a supplier
Purchase Orders	Place orders for approval and submission to suppliers
Goods Receipt	Accept deliveries from suppliers
Credits & Returns	Track Credits and Returns with stock management and Automatic journals
Purchase Payments	Make payments to suppliers and allocate against invoices
Payment Wizard	Create bulk payments to suppliers and upload directly to your bank account
Purchase Approvals	Control costs with purchase approvals
Purchase Re-ordering	Re-order Items based on min, Max and re-order stock levels
Transaction Consolidation	Merge multiple purchase transactions into one to simplify Goods receipt and invoices
Split transactions	Take a single transaction and split it across multiple transactions
Emailing	Send purchase transactions via email to suppliers
Dashboards and reports	Comprehensive dashboards and reports to provide deep knowledge of business performance
Multi Currency	Set Supplier currency or build foreign currency price lists
Activities	Tag transactions with activities to create workflow, notes or reminders
Relationship Map	See the link from request to Pay
Copy from and To	Copy individual lines and quantities from base transactions and copy to target transactions
Notifications	Get real time notifications on purchase transactions
Stock Levels	See stock levels in multiple warehouses and the free, committed and available quantities
Production	Manage stock levels of raw materials based on production requirements
Attachments	Add attachments to documents to centralise data
Custom Fields	Add additional fields to capture important information
Multiple Price lists	Create multiple prices lists in different currencies and assign to suppliers
Duplicate transactions	For template transactions & repeat transactions
Purchase Analysis	Get detailed analysis on product and supplier purchase
Back 2 Back	Create Purchase Orders from sales orders for non stocked items
Mobile Apps	Take purchasing on the road with a choice of Apps
Goods Receipt	Automatically accrue Purchases not yet invoiced
Good In	Book Stock straight to the balance sheet when its received
Returns	Manage Returns of items to suppliers from Goods receipt
Service	Create purchase orders from the service module to manage replacement parts
Purchase scanning	Scan invoices directly from email and automatically match to Goods receipt and PO
3-way matching	Match PO's Goods receipts and Invoices
Expenses	Capture, Approve and Post streamlined expenses solution direct to the General ledger
Expense analysis	See who and on what has been spent by user. Differentiate between user paid and business
Tax Automation	Automatically claim taxes on expenses when approved



# Feature List

## Centralised Inventory Management

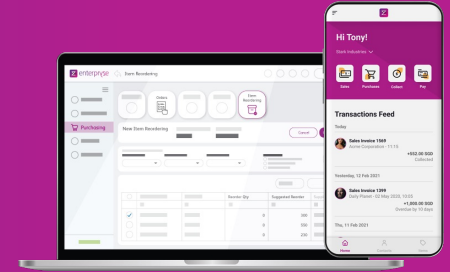


Item Records	Store All Items details in one place
Multi Currency	Set Supplier currency or build foreign currency price lists
Perpetual Inventory	Automatically post stock values to the balance sheet based on stock movements
Margin Analysis	Track margin by Moving Average, Last purchase price and actual cost
Multiple Inventory types	Stock Items, Service Items, Production items, dimensional items and Batch tracked items
Multi Warehouse	See stock levels across all warehouses and locations. Hide warehouses by user
Stock Adjustments	Manage adjustments of stock in and out for breakages etc
Stock Take	Carry out routine stock takes to get accurate stock levels and values
Stock Posting	See all stock Postings for items or groups of items
Stock Valuation	See the value of stock by individual item, group or location up to a certain date
Stock Transfer	Quick or detailed stock transfer from one location to another
Activities	Tag transactions with activities to create workflow, notes or reminders
Committed Stock	See the amount of stock committed to customers o sales order
Delivered Stock	Deplete stock levels and automatically post to the general ledger based on Deliveries
Received Stock	Increase stock levels and automatically post to the general ledger based on Receipts
Batch Traceability	Manage expiry dates and track relevant information related to batches of stock
Stock Levels	See stock levels in multiple warehouses and the free, committed and available quantities
Custom Fields	Add additional fields to capture important information
Barcode Scanning	Assign barcodes and scan products in and out of stock
Multiple Price lists	Create multiple prices lists in different currencies and assign to suppliers
Duplicate Items	To simplify the creation of items including complex BOM's
Bill of Materials	Reduce raw materials and make finished goods
BOM Margin	Track historical Production jobs and margin on each run
Available to make	See what you can make based on raw materials in stock
Multi level BOM's	Create levels of BOM's see stock across all levels and make with on click
Dimensional Items	Manage stock by length and width
Mobile Apps	See Stock levels across all warehouses via the mobile
Attachments	Store Attachments against items and email as copies with transaction
Item Images	Store images of items and display on PDF transactions
Item Prices	Set multiple price lists, volume discount's and more. Hide price lists for users
Good In	Book Stock straight to the balance sheet when its received
Good Out	Manage Returns of items to suppliers from Goods receipt
Perpetual Inventory	Create purchase orders from the service module to manage replacement parts
Configurator	Product configurator for sales order or BOM creation



# Feature List

## Finance and Banking Management

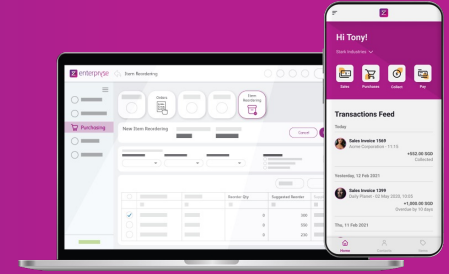


Multi Currency	Set Supplier currency or build foreign currency price lists
Perpetual Inventory	Automatically post stock values to the balance sheet based on stock movements
Margin Analysis	Track margin by Moving Average, Last purchase price and actual cost
Cost Centres	Apply up to 5 levels of cost center and set defaults against customers and suppliers
Project codes	Create unlimited project codes and apply as default to customers and suppliers
Stock Adjustments	Automatically post to the general ledger
Stock Valuation	Updates the balance sheet in real time
Profit and Loss	Real time P&L with drill down to transactions and year on year comparisons
P&L comparisons	Run P&L against other periods or budgets
Balance sheet	Run the balance sheet based on any date to see the position at that point in time
Balance sheet	Report on comparison periods
Balance sheet	Vertical and horizontal balance sheet
Excel integration	Export all reports to excel for further analysis
Stock Posting	All stock movement transactions automatically update the general ledger
Financial graphs	See movements of Liabilities, Cost of goods sold and more
Localisations	Certified for Ireland, UK, Singapore, USA, Canada, Malaysia, Thailand, Denmark and more
Foreign Currency Journals	Create journals in foreign currencies
Chart of Accounts	3 levels of COA for simple or complex reporting
Budgets	Create multiple multi year budgets for scenarios, costs centers, projects and more
Gross Margin	Track gross margin by Item, Customer and supplier
Daybooks	Report on transactions using traditional Daybooks
Project analysis	Track revenue, costs and profit by project
Accounts payable	Track account balances inc. future commitments and easily send copy invoices and statements
Accounts receivable	Track account balances and manage payments quickly and easily
Expenses	Seamless integration with expenses direct to GL including Cost center defaults
Bank feeds	Connect to 1,000's of bank accounts to get bank feeds for reconciliation
Payment Wizard	Create payments to multiple suppliers in one go and upload directly to the bank
Stripe	Take credit card payments via stripe
Bank Balance	With connected bank accounts you can get real time view of bank balance
Multi currency	Manage multiple bank accounts across multiple currencies
Bank Reconciliation	Auto match Bank transactions with system transactions to simplify reconciliations
Payments & Journals	Create quick ad hoc journals or payments against Transactions to speed up reconciliations
Reconcile invoices	Quickly reconcile against invoices to create payments automatically
Save reconciliations	Save ongoing reconciliations for completion later
Peppol	Integrated with Peppol for e-invoicing



# Feature List

## Customer Service Management

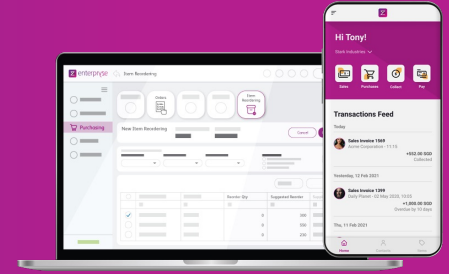


Customer details	Centralised customer data records with full 360 customer view
Calls by Queue	Manage calls in a queuing system
Calls by technician	Schedule and plan calls by technician
Resource scheduler	Drag and drop calls and see availability by technician
Parts delivery	Deliver parts to customers and calls from van stock or central warehouse
Preventive Maintenance	Create and manage re-occurring service calls
Project Management	Plan project phases and activities to track progress and profitability
Service billing	Create service calls from sales orders and bill seamlessly on completion
Sub Activities	Create sub activities against service calls for more complex tasks
Teams	Manage multiple resources against service calls
Mobile App	Comprehensive App to update and create calls from the field
Mobile App	Deliver spare parts and create transactions from the app
Attachments	Save attachments to service calls and email as part of the resolution
Signature and Photo POD	Capture proof of delivery of service with signatures or photos
Call analysis	Capture and report on problem type, sub type, call status, priority and more
Custom fields	Add fields to capture additional information and assign fields to the start, during and end of a call
Map	See where your technicians are in real time on the Enterpryze Map
Jotforms	Integrate with Jotfrms to create unlimited web forms and questionnaires
Follow	Get notified of updates to calls with the follow feature
Notifications	Receive notification of calls assigned to you
Email	send automatic emails to customers on creation or update of service calls
Portal	Give access to Customer portal to your customer to create, update and review their calls.
Skill	Set skills by technician and assign the right calls to the right people
Outlook Integration	Create and update service calls and activities directly from outlook
Sales orders	View sales order, project codes, customer and sales person information



# Feature List

## Resource Management

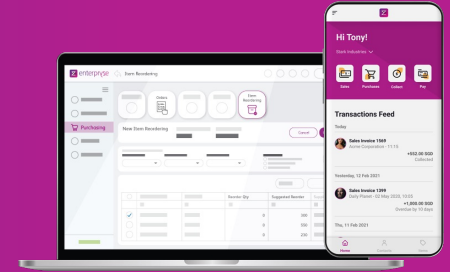


Planner	Integrated Resource planner to sales, service, production and people
People	Filter and plan tasks to people or teams of people
All-in-one	Plan Orders, deliveries, service calls, activities and production
Color coded	Color code different types of transactions to quickly see the plan by type
Open / closed	Easily see what calls or orders are open
Map	See where everyone is through the real time app
Projects	Track the status and plan of all phases and sub activities within a project plan
Make to Service	Track every phase of an Order from production through to delivery, commissioning and service
Search	Search the planner for customers, transactions or types of tasks
Multi view	Choose from multiple views to see your plan your way
Drag and Drop	Simplified drag and drop to quickly assign tasks to technicians and drivers
Multiple resources	Manage multiple resources per job in the planner in one go
Time	Track actual arrival and departure time via GPS setting on the mobile app
Production resources	Create and assign orders to production resources to manage capacity planning
Sales tasks	Create-re-occurring activities for sales teams to manage customer visits
Preventive maintenance	Forward plan re-occurring service calls for preventive maintenance plans
Mobile Task list	Planned calls immediately appear on service and delivery mobile apps
Drill down	Click to view all transactions details from the planner



# Feature List

## Production & Materials Management

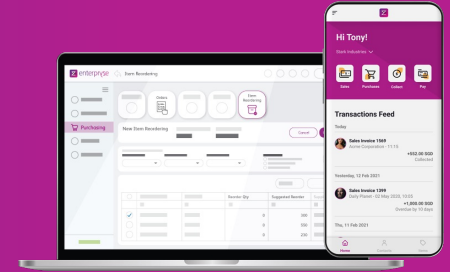


Bill of materials	Create unlimited Bom's with unlimited raw Materials
Multi level Bom's	Create levels of BOM for phased production
Discrete production	Backflush or manual production
Make to order	Make finished goods from sales order
Make to stock	Create order to make finished goods to stock
Batch Item raw materials	Track batch going into production
Batch item finished goods	Create new batches for finished goods and trace raw material batches
Margin Analysis	Track the margin on every make on moving average, last purchase price or price list
Planner	Integrated Resource planner for production, resources and people
Make to warehouse	Make finished goods to specific warehouses for quality control and better stock management
Available to make	See what you can make based on raw materials in stock
Production pick list	Create production pick lists for raw materials
Production History	See all production history for a finished item including margin
Production costs	Add labor and pother production costs to your Bill of materials to accurately track margin
Projects	Track the status and plan of all phases and sub activities within a production plan
MRP	Reorder raw materials or manufacture items based on min, max and committed stock levels
Finished goods cost	Track the finished goods cost price based on raw materials and labour ocsts
General Ledger	Automatically update the general ledger based on production jobs
Production resources	Create and assign orders to production resources to manage capacity planning
Supply chain	Track the ordered, committed and available stock levels for raw materials and finished goods
Duplicate BOM's	Copy Bom's for easy creation of variant finished goods
Item grouping	Detailed financial and item analysis using items grouping
Attachments	Include drawings, instructions and other relevant documents to items
Email	Attach PDF's to finished goods orders to provide additional information on items
Custom fields	Track additional information on items with additional fields



# Feature List

## Customer Relationship Management



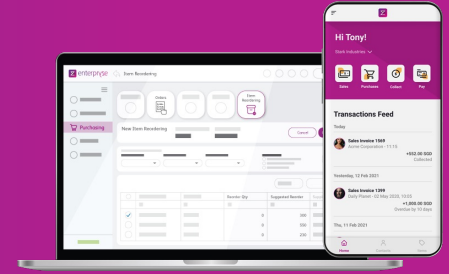
Customer Records	Store All customer data to get a 360 view
Lead Management	Track all opportunities from initial enquiry to sale
Central Storage	Store and link all documents relating to a Lead, Tender or Proposal
Activities	Track all Opportunity activities
Drag and Drop	Quickly and easily move opportunities from stage to another.
Reminders	Set reminders to follow up activities
Closing month	Quickly view all opportunities due to close in a month
Quote to Order	Send digital quotes for customer approval
Stock visibility	See stock levels as quotes are generated
One click order	Copy quotes or multiple quotes to one order in one click
Outlook integration	Create opportunities and activities straight from outlook
Custom fields	Capture additional information against opportunities
Website integration	Connect you contact us form to create new leads
Lead ageing	Track the age of leads to ensure pipeline momentum





# Feature List

...and so much more



- Customer Records      Store All customer data to get a 360 view
- Lead Management      Track all opportunities from initial enquiry to sale
- Central Storage      Store and link all documents relating to a Lead, Tender or Proposal
- Activities      Track all Opportunity activities