



# ECManage

Flexibility – Reliability – Easy



# ECManage

## WHAT IS IT?

ECManage is a fully customisable Client management system, designed to be flexible and satisfy the needs and requirements of the almost any industry.

User friendly and easy to use, ECManage allows you to create customer accounts and manage your relationship with them in many different levels, including quotes, jobs, invoices, proposals and related reports. Client management is intuitive, including client groups (SME, Consumer), dynamic statuses, full client tracking (i.e. your customer resource managers track all calls, comments and work done for client)

ECManage also includes a complete and fully integrated and automated suite of search tools, reports and performance statistics organized by different criteria (statuses, date ranges, etc.) which allows you to make effective decisions based on reliable data.

## ADVANTAGES

Flexibility	Reliability	Easy
<ul style="list-style-type: none"><li>▶ You can define what parts of the system are relevant for your business.</li><li>▶ Choose what reports will be needed.</li><li>▶ Flexible modules including quotes, purchase orders and briefs.</li><li>▶ Assign permissions to different users according to their functions.</li></ul>	<ul style="list-style-type: none"><li>▶ Daily backups and fully redundant.</li><li>▶ Fully hosted in our secure local data centre.</li><li>▶ Make informed decisions using varied types of reports, lists and graphs.</li><li>▶ Management of system users, a large among of features relate to users giving them different levels of access. Administrator and Superuser accounts included</li></ul>	<ul style="list-style-type: none"><li>▶ Intuitive Design</li><li>▶ Online access: Access from anywhere, anytime.</li><li>▶ Reduce paperwork</li><li>▶ Real-time messages and alerts.</li><li>▶ Internal notice and messaging module.</li><li>▶ Display and searching of your expiring clients' for retention purposes, show today's, tomorrow's, next week's, next month's and monthly for the next 6 month's clients.</li></ul>



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## SYSTEM DETAILS

### Reporting

- ▶ Real-time reporting of job progress, based on time allocation.
- ▶ View details of each user and assigned jobs and job items.
- ▶ View cost details based on job time usage and purchase orders.
- ▶ Reports by client, user, manager, or supplier.
- ▶ Clients statuses snapshots.

### Alerts

- ▶ Automated e-mails.
- ▶ Jobs, job items and purchase orders due dates.
- ▶ Time usage above allocated times.

### Security

- ▶ Fully encrypted site.
- ▶ User names and passwords management.
- ▶ Authentication and Access control.

### Client & Supplier Accounts

- ▶ Comments, statuses, invoices and call-back management.
- ▶ Assign user access to client/supplier files and accounts.

### Job, Quotes, Purchase Orders

- ▶ Create jobs, with job items, time allocation, and user assignation.
- ▶ Associate purchase orders to jobs for better planning and cost control.
- ▶ Create quotes for your clients.
- ▶ Assign due dates and special statuses.

### Users

- ▶ Unlimited remote users.
- ▶ Super-user and administrator accounts.
- ▶ Management of users.
- ▶ Customisable user access levels permissions.

### System Requirements

- ▶ Active internet connection for access to the system.
- ▶ Can be accessed from Windows, OSX, or Linux; and though all common internet browsers

### Service Level Assurances

- ▶ System availability of 99.9%
- ▶ Local support, maintenance and monitoring.
- ▶ Service Level Agreements (SLA) available.