Ezijobz SME Edition

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Ezijobz SME is leading a revolution that is bringing ERP to the small and mid-size businesses of this world. Recent advances in technology allow us to bring you the first ERP system priced and designed for everyone! As you can see by the many features and configuring options listed below, Ezijobz SME can benefit almost any type of business.

Operational Functionality

Order Entry and Counter Sales:
- Customers with multiple Contacts, Addresses, Corporate Billing and email options
- Order Entry and Counter Sale functionality
- Order Lines can contain Stock, or 'Task' related entries
- Kitset Order entries
- Barcode entry and Product picture display
- Optional Picking function
- Optional Backorder Processing
- Cash-Drawer and Receipt printing
- Miscellaneous Charges 'Template' for auto adding to Order
- Extensive Pricing Matrix covering Stock and standard 'Tasks'
- User-Defined Formula pricing
- Alternative percentage based discount covering all lines
- Order Value Discounts

Quoting and Estimating:
- Comprehensive, Advanced Rules-Based Configurator
- Fixed Price or Cost-Plus Quotes
- Quick Quote option
- Optional Quote production from standard Templates
- Quote Quantities from 'Take-Offs', Formula calculated, or keyed in
- Pricing from date effective matrix, standard discount, or calculated from User-Defined rules.
- Four Quote print styles (Formal, Letter, Letter with details, Multi-option)
- Email Quote delivery option
- Ability to attach external files
- Ability to print images on Quote

Inventory Planning Process:
- Multiple Manufacturing Methods per Item
- Date-effective Components in Bill of Material within each Method
- Multi-Level Bills of Material Inquiry
- Graphical Item Forecasting with new entry or based on history
- Re-Order Templates for Product variants (Example:- Style, Color, Size)
- Material Requirements Planning based on Forecast and Actual demands
- MRP Planning Horizon and Demand Timefence by Item
- Auto or selective conversion of Planned Orders to Purchase or Shop Orders
- Branch Stock re-order templates with In-Transit and Transfer facilities

Inventory and Warehousing:
- Items can contain optional picture, barcode, unique characteristics and attachments
- Multiple Items per Inventory Location, multiple locations per Item supported
- Multiple Stock Units of Measure maintained throughout
- Alternative Items, Complementary Items, Supplier and Customer References
- Van stock replenishment based on Van stock replenishment templates
- Van stock Control and automatic down-dating of stock from Van
- Full Stock Movement History recording
- Fixed, Average and Last Cost supported with Inventory valuations by each method

- User selected Physical Inventory
- Full Loan and Consignment Stock Control
- Multiple (Optionally Illustrated) Product Catalogue production
- Full Serial and/or Lot Control
- Shelf Life Control and Stock rotation provision
- User-defined variable Dimensions, Characteristics, Stock Units within same Item
- User-defined variable pricing Formulas by Item

The Job Process:
- Multiple Job Types (Invoiced, Non-Invoiced, Internal)
- Project and/or Contract Segregation with Stages and Tasks
- Multiple Jobs linked to Project and/or Contract
- Job Templates for standard Jobs
- Job Details can use Descriptors, Catalogue Items, Stocked Items, or keyed in
- Job Sheet print with materials, multiple Resource allocation and Stage segregation
- Multiple Resources per Job, each with own start time and duration
- Graphical Job and Resource Scheduling
- Summary or detailed Actual usage data entry (Labor, Inventory and miscellaneous)
- Multiple Product Variables (Example, Style, Color, Size) per Job
- Multiple Customers (and Customer Invoicing) per Job
- Job Cost and Profitability reporting
- Percentage or Actual Based Invoicing with multiple Invoices per Job
- Multiple Payments per Invoice with Credit Notes and Refund processing
- Extensive Analysis of Jobs, Job Details, Job Actuals
- Warranty Recording with Warranty sheet printing
- Dealer Authorization processing and monitoring

The Manufacturing Process:
- Optionally elect Manufacturing Method when raising Order
- Single or Multiple products per Shop order (Bi-Product, Co-Products, etc)
- Multiple Jobs linked to Contract
- Job Templates for standard Jobs
- Order Components can be Descriptors, Catalogue Items, Inventory, or open format
- Job Sheet print with materials, multiple Resource requirements and Op. segregation
- Multiple Resources per Order (M/C, Labor, etc.), each with own start time/duration
- Graphical (Drag and Drop) Job, Machine and Resource Scheduling
- Summary or detailed Actual usage data entry (Labor, Inventory and miscellaneous)
- Time Sheet entry process
- Subcontract Work Authorization processing and monitoring
- Label Printing to support Job process

The Supply Process:
- Suppliers with multiple Contacts, Addresses, and email options
- Pricing from date effective matrix, or Formula calculated
- Purchase Orders generated from Jobs, Stock Level Replenishment, or manually entered
- Purchasing Templates to cover Product variations
- Order Lines can contain Stock, or 'Task' related entries
- Purchase Order receipting and 3-way matching
- Supplier payments processing

The Service / Maintenance Process:
- Multiple Predictive, Preventive and Reactive (Breakdown) Events per Asset
- Events can be Date related or based on frequency, Usage and Units produced
- Hierarchical Event processing to exclude sub-level Events
- Hierarchical Asset processing to update multiple Asset actuals from single entry

- Dependent Events showing recommended supporting Service Events
- Suggested' Service Jobs automatically evaluated from Event's criteria
- 'Reminder' letters for external Maintenance Events
- Selective conversion to Job
- Full Asset Service history with costs

Activity Notes:
- Activity Notes monitor Actions, Issues, or personal reminders.
- Can be related to Job, Customer, Supplier, Asset, Item, Descriptor, or non-related
- Can be associated with, and exclusively viewed, by signed-on User

Knowledge Base:
- Keeps a historic record of Customer Questions raised and Responses given
- Extensive Search facilities available when responding to Customer questions

Workflows:
- User-defined pictorial Workflows showing process steps
- Click on picture to go to relevant screen or report
- Standard Workflows provided with system
- Workflow access restrictions by User

Company Standards:
- Company Standards Library conforming to ISO9002
- Document Library (Procedures, Safety, Management structures, etc)
- Drawings Library of Items, Assets, Tools, etc with facility to view or print
- Locations Library (Inventory Location, Asset Location, Site Maps, etc)

Job Configurator:
- Can be Features & Options, Simple or Multi-Level Rules based
- Uses Product Groups and/or Attributes
- Dimension and Usage Variables
- Multi-Level Rules for inclusions, exclusions, and dependencies
- User-defined Formulas. Can be embedded in other Formulas
- Entered or calculated Values copied to Jobs and Drawings

Customer Support:
- Provides full Customer 'After-Care' and 'Help' service.
- Can be related to Support Contracts (Period, Fixed, Monetary, or manual basis)
- Automatic or manual Call activity monitoring
- Call Follow-up monitoring using Activity Notes
- Optionally copy Call and Response to Knowledge Base

Financial Accounting Functionality

Expenses and Miscellaneous Income:
- Recording and monitoring of miscellaneous Expenses and Income
- Miscellaneous Expense and Income Templates to cover repeats

Cashbook:
- Multiple Bank Accounts supported
- Simple yet comprehensive reconciliation processing
- Add miscellaneous extras (Bank Charges, etc) 'on the fly'
- Pictorial view of expected income/expense based on current unreconciled entries
- Graph of anticipated Income (Outstanding Invoices) by user-defined periods

Business Activity Reporting:
- Business Activity Codes can be attached to all Income and Expense lines
- Can be set up to conform to Australia's Business Activity Reporting standards
- Full Income and Expense Reporting by Business Activity Code

Company Health:
- Business Statistics Report shows information relating to Business performance
- Supplier, Customer, and Inventory Report is a 'snapshot' of the current status
- Detailed Analysis screens of Jobs, Income, and Expenses

Cashflow Forecasting:
- User defined display periods
- Budget entries for Income and Expense
- User Options - selected Banks, Past-Due spread, Payment Tolerances
- Output to spreadsheet showing
  - Actual or Budgeted Income and Apportioned 'Past Due' Income Amount
  - Actual or Budgeted Expense and Apportioned 'Past Due' Expense Amount
  - Opening and Closing Balances per period

General Ledger:
- User-defined Account Code definition and hierarchy
- User-defined Period definition
- High-tech Analysis and reporting facility with User-defined columns and calculations
- Account Budgets by Year
- Manual, Standard, Recurring, and Reversing Journals
- P&L, Balance Sheet and Journal Posting Reports
- Standard Period end and Year end processing

General Ledger Interface:
- Interface to 3rd party General Ledger(s)
- Simple or Detailed external Account Code Mapping
- Output to 3 different General Ledger from same source

General Features and Utilities

General Features:
- Extensive Search & Sort Facilities
- Email to Customer or Supplier, Single or Broadcast.
- Inbuilt Calculator, Spell Checker, and Thesaurus
- Voice Synthesizer to read field content of field Help text
- Full User amendable Field Help
- Supplier Catalogue Importing with facility to drag and drop to Jobs
- User-definable Queries output to spreadsheet
- User definable fields
- Data Analysis routine with sorting, grouping, selecting and multi-media outputs
- Auto archiving of printed documents with recall option
- Interactive guide, demo CD, User Guide

Email Option:
- Single and Broadcast email options
- Email primary documents (Quote, PO, Invoice, etc) as attachment
- Various attachment formats available
- Database logging of all emails
- Historical view by Customer or Supplier

Systems Administrator:
- Set up and maintain system defaults, User codes and Access restrictions
- Password Access control
- Reporting Groups to restrict reports to defined Users
- Full Field Help maintenance
- Field level security by User - covers Hide, Display only, Resize, Move, Amend title
- System Backup and Recovery processing
- Setup Wizards

Statistics and Key Performance Indicators:
- User Defined KPIs and Statistics
- Display KPI expected and actual values display
- User Defined Status with icon for easy viewing
- Segregated into Modules
- Viewing restrictions by User

Technology and Integration

Report Writer:
- Create own Reports and/or modify Standard Reports
- Simple Drag-and-drop functionality
- Can easily create data-aware components and associated formatting components
- Professional quality report creation using Report Wizard
- Unmatched levels of flexibility
- Group components using regions
- Create relationships between stretching components such as memos, richtext and subreports, and the flexibility
- Nesting full-fledged reports within one another
- Multiple nested drill-down subreports
- Print Preview window allows ongoing view of Report.
- 'Hot' Print Previews allows launch of independent reports
- Twenty-one components (labels, shapes, lines, memos, checkboxes, barcodes, charts, etc) are standard

Drawing Editor:
- Drawing Editor is a Vector Graphic application that includes:
  - Importing and exporting of standard image formats
  - Creation of Detail/Assembly drawings, Electrical/Networking diagrams, and Site/Construction Plans.
  - Superimpose schematics on photographs or map images
  - One document may contain multiple charts that can be cross-referenced from various objects belonging to various pages (charts)
  - Page background and background image are fully supported
  - Multiple layers support (layer can be editable, readable and hidden)
  - Object groups are supported
  - Object alignment, mirroring, rotating, angled text, gradient fill are supported
  - Objects can be copied, duplicated, moved, cut or copied to clipboard
  - Image zooming and printing.
- Drawings or Graphics can be printed on, Quotes and Job Sheets.
- Drawings or Graphics can also be linked to Customers, Suppliers, Items, Assets, and Descriptors.

Data Analysis:
- Sort any column into ascending or descending sequence
- Filter the records based upon your own selection criteria
- Move columns by clicking on the column heading and 'dragging'
- 'Close up' to match the amount of data in the field.
- Remove unwanted columns
- Group records using Drag and Drop
- Define Column Summaries (Sum, Min, Max, Count, Average)
- Output results to Printer, file or other formats (PDF, excel, html, etc)
- Retain the settings

Mobile Phone Integration:
- Simple, effective solution to bring your field personnel on-line
- Send Text messages directly from your computer to your Sales Force.

PDA Device Integration:
- Reliable and simple download of Job, Customer and Stock count information
- Job activity recording (Start Date/Time, Notes)
- Time sheet recording by Job
- Stock Count Activities
- Activity upload of amended and added information
- Expenses entry

Other Technology:
- SQL compliant, single or multi-user (1 to 100+) scalable deployment
- Operates in a Client Server environment with Relational Database
- Graphical Planning Board with 'Drag-and-Drop' Resource scheduling
- Data extract Query generation Tools
- Built-in spreadsheet
- Web, MS Office, Fax and email links

Ezijobz Industry Sheets are available ON REQUEST for SME target markets providing industry specific functionality and terminology