eazzy

Brochure

EAZZY COMMERCE

Company Profile

KM ORIZZON LTD is the software specialist for the following Professions/Industries:

- Offshore Management Companies and Company Secretary
- Insurance companies / Insurance Brokers & Agents
- Commerce/Maintenance/Workshop/Garage
- Notaries

All our solutions have been integrated with the powerful EAZZY Filing, which is a Document Management Software.

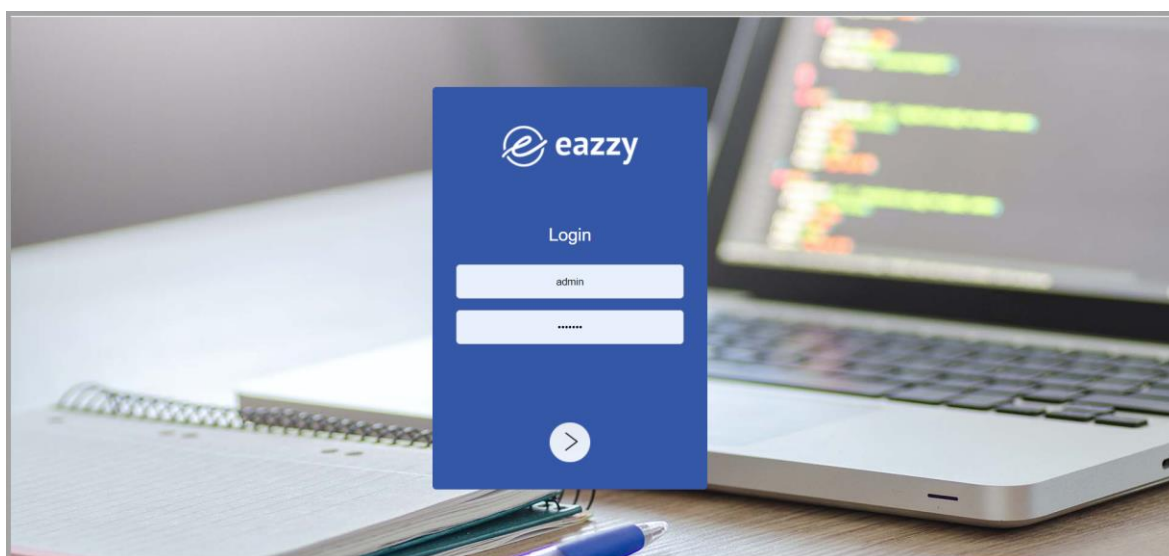We also have many add-on modules to cater for the specific sotfware needs a company may have.

EAZZY COMMERCE

Welcome to EAZZY COMMERCE !

This simple, easy to use, browser-based solution, is for every business in commercial activities, which must manage efficiently the whole leads to sales process, equipment management, including sales rentals, maintenance & follow ups, service jobs and other technical interventions etc.

EAZZY COMMERCE will also monitor sales teams & hierarchies, sales teams' budgets, new contracts, contracts renewals, jobs etc. and is a very flexible solution. It is also integrated with Eazzy Filing, our Document Management Software.

EAZZY COMMERCE

Default Features

Contact Management

Manage your clients or prospects efficiently by getting a complete 360 view about them and their activities. This will include all the information about their equipments, their quotes, jobs etc or other forms to which they are linked to in the system.

Master the information about them at all times, the history of all maintenance contracts including active ones, those which are linked with which equipment, and the list of all rental contracts as well as the list of RFS (Request for service/sales) for the client.

The inbuilt CRM Module will facilitate the creation and follow up of all quotes and jobs while you may consult the status of the customer's statement of account with your company.

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Sales Management:

Create easily all your quotes and follow their progress status: from the lead to an awarded sales, till the end of the sales process.

Eazzy will automatically generate the quotes in excel or in pdf with your information and save the generated documents directly in the integrated Document Management System inbuilt in the form itself. You may link a workflow or a task to a quote. All quotes may be linked to an RFS, in the case of a sale.

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RFS – Request for Service/Sales Management

Manage efficiently all clients' requests for any type of technical service or a product sale – they will all fall under an RFS: Request for Service or Request for Sale.

All requests are easily created and monitored in the system. Send notifications or generate various reports to ensure that the Back Office is aware at all times of the tasks to manage or follow for a customer. In doing so, ensure that tasks are not forgotten, and that deadlines are met in due time, thus ensuring a high level of service towards your customers.

This section thus ensures that, all clients' problems, issues or requests are recorded, managed and listed in your database, for a unique source of truth about your clients and their requests.

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OPERATIONS – Project, Job, Maintenance & Rental Management
Project Management

The Project management section will ensure that all tasks and follow ups etc linked to a, and the history of every job up to the invoicing, under a unique Project name. project are grouped under a unique umbrella.

In other words, this section will help manage everything from the creation of an equipment, the follow-up of maintenance contracts, the list of RFS and quotations

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OPERATIONS – Project, Job, Maintenance & Rental Management
Job Management

Manage all jobs in this section until their completion, while following their status. Get all the information you need to manage efficiently:
- The budgeted labor vs the one consumed, using a bar code system and/or an electronic intervention sheet.
- Insert any subcontracting costs linked to a job
- Issue spare parts on jobs from a stock management software, which is linked to this job on Eazzy.
- Manage in real time the spare parts consumed on any job.
- Get a summary of all expenses linked to a job, as well as all the time spent on any intervention.

To summarise, the Job Management Module will analyse every element, such as:

Costs, items, profitability, the equipment/vehicle on which repairs are required, type of repair, job status, the RFS itself, status of maintenance or rental contacts etc..

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OPERATIONS – Project, Job, Maintenance & Rental Management
Maintenance & Rental Management

Maintenance contracts and Rental Contracts are type of contracts which are managed in the system.

Maintenance contracts will consist of different types of maintenance interventions such troubleshooting and repairing, adjusting, overhauling and general servicing on any equipment.

Rental contracts will consist of rental equipment agreements made with a client not willing to purchase equipment, while wanting to get the benefits of such equipment.

The Maintenance & Rental module will ensure you are on top of all company's contracts, their renewal dates, produce alerts and give you every other detail linked to them. Rental and Maintenance contracts are treated separately in the system.

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Planning & Intervention

It is in this module that you will plan and assign jobs/interventions to your teams or technicians with respect to a job.

This planner is accessible to both the Administrator/planner and the technicians. It provides visibility on all jobs: when they are planned, what are the jobs' deadlines or those which have not been tackled yet etc..

Plan for daily, weekly, monthly and recurring interventions. Link the planner to the technician and the related intervention sheet and facilitate the view on all job's statuses in real time with different colors being displayed in the planner.

Depending on the role of a user, access rights will vary too. This means that the rights to create, edit or delete data in the Planner will vary too and may not be same for everyone.

A Supervisor will be able to:
- Create an appointment for himself or colleagues
- Manage recurrence on certain types of interventions/appointments

A technician will only be able to:
- Open his planner
- View his specific appointments/interventions
- Open the specific intervention sheet

But will not be able to change appointments recurrences, change or delete time/dates of appointments… etc.

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Intervention Sheets

The technicians will be able to connect to the electronic intervention sheets at the client site, update it (insert photos, videos, comments, signatures) and even automatically send the signed intervention sheets by email in real time.

Generate several reports with respect to intervention sheets.

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Checklists for intervention sheets

Intervention sheets for jobs, may be generated into predefined and standardized checklists for certain recurring types of servicing.

The Checklist format:

- You may create as many checklists as you wish. For example
    - 1st service – checklist one
    - 2nd service – checklist two
- This intelligent intervention sheet, may be customized for each type of equipment in order to be in line to the business activity
- This will ensure that technicians follow with precision all the required steps/checklists elements linked to a specific checklist.
- Avoid the risk of mistakes or missed out tasks

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Equipment Management Module :

In this module you will manage all the information about an equipment:
- The make, model, product category/sub-category, serial no, its location at client, unique system equipment code
- Information on whether the equipment is still under warranty or whether there is an active maintenance/rental contract linked to it
- List of your suppliers from whom the equipment is purchased, date of stock/batch purchase, price, depreciation …
- 360 view on how an equipment is linked to other forms in the system
- In built DMS (Document management System) linked to the equipment section, where you can file or create documents.

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Follow Ups Management
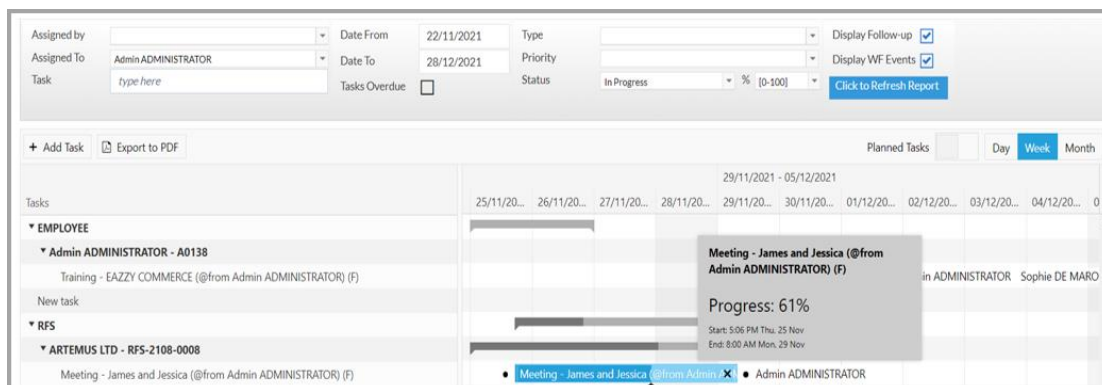
Manage efficiently follow ups you have assigned, or which were assigned to you.

Analyse your priorities on the dashboard, in order to meet your deadlines and reduce the risk of forgetting your tasks! .

A very powerful tool, mixing Gantt Chart, Follow-up's, Due date Reminders, reports and Workflow Tasks.

Property/Lots:

This module is for the creation of properties' databases and their defined sub-lots, in order to link them to an equipment.

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Billing

It is in this module that you will manage all quotes/invoices and credit notes.

Follow the flow, from the creation of a Proforma, to its validation and then, to its conversion into an invoice.
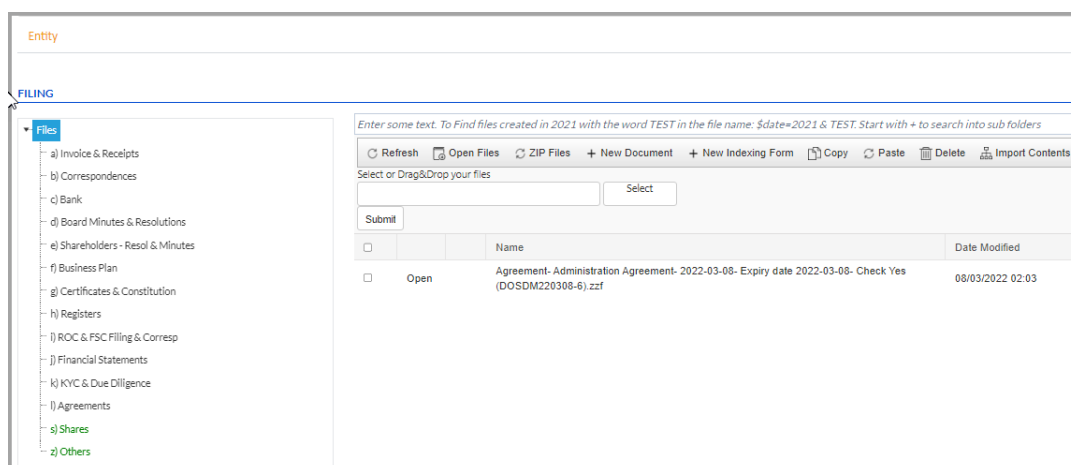
Generate automatically Proforma and/or invoices in Excel or in Pdf, which will get saved automatically in the integrated Document Management section.

The software may be linked via an exchange file to your accounting software.

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Filing & Document Management System (DMS)

The document Management section exists at all levels in EAZZY COMMERCE:

- The filing of electronic Documents filing may be linked either to your O365 SharePoint site or your office windows explorer
- Eazzy will create automatically your filing directories
- Generate, Create, Search, Modify, Save and Classify any type of documents
- Upload templates with or without naming convention
- Work with documents and data within the same software for a unique source of truth
- Benefit from additional SharePoint Online features: concurrent document sharing, versioning, online documents, comments to colleagues within documents

Reports :

- The software has a variety of inbuilt reports, which may be exported to excel for further analysis
- Personalised dashboard for different types of follow ups is also possible

Thank you