



Brochure

EAZZY CORPORATE SECRETARIAL



Company Profile

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

- Offshore Management Companies and Company Secretarial Offices
- 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 needs a company may have.

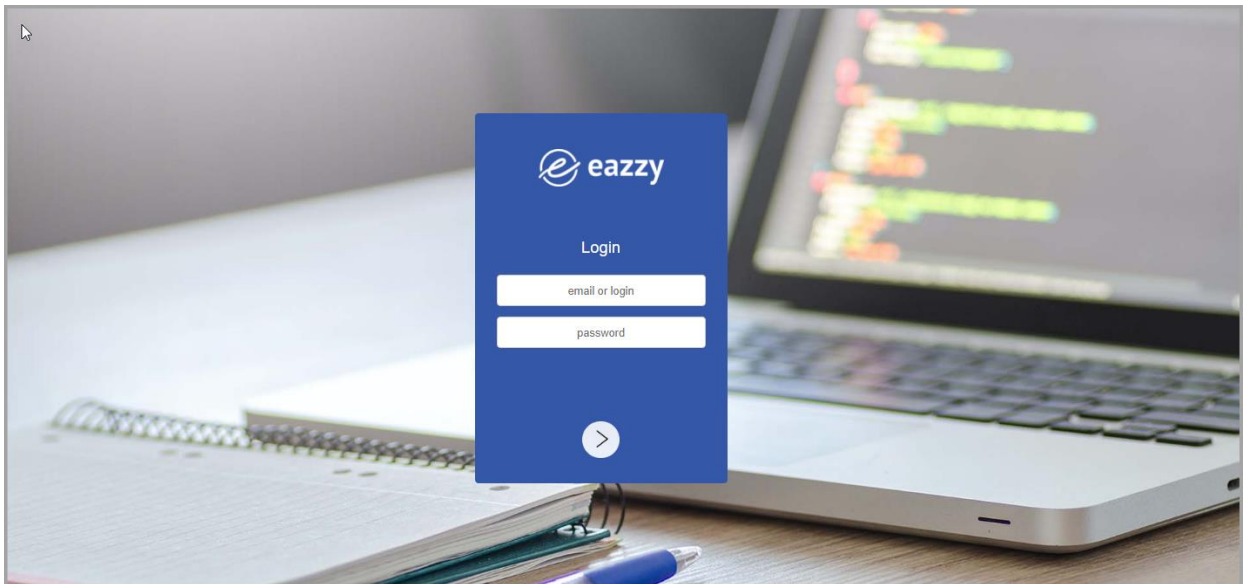
Many leading companies use EAZZY, and our software is the leader in Mauritius.





Eazzy Corporate Secretarial

Welcome to EAZZY CORPORATE SECRETARIAL, the software to manage all types of client entities, in browser mode. The software and its many add-on modules will be described in this document.



CORPORATE SECRETARIAL PORTAL

2

sdemarussem@orizzon.com

Logout

Contacts

Persons

Companies

Funds

Foundations

Trusts

Requests/Meetings

Timesheet

Billing

Service Providers

Parameters

Eazzy Corporate Secretarial Video Tutorials

Contacts

Contacts0

Persons

Natural Persons3

Expired Passports0

Profile Checks Coming Up0

Profile Checks Expired1

Legal Persons2

Compliance Reviews Coming Up0

Compliance Reviews Expired1

Entities

Active Companies6

Active Funds0

Active Foundations1

Active Trusts2

Licenses/1P Expired since 6 months4

Compliance Reviews Coming Up0

Compliance Reviews Expired1

My Portfolio

Companies6

Funds0

Foundations1

Trusts2

Validation Process

My Submitted Not Processed0

To Process0

My Submitted Rejected0

TOTAL REQUEST IN PROGRESS

<7 days

<14 days

<30 days

>30 days

Requests Overdue <09/06/2022 (my Team)

2

EAZZY Web 2022-11-07 00: Prepared by KM Orizzon Ltd



Eazzy Corporate Secretarial

Default Features

Contacts Management

The screenshot displays the Eazzy Corporate Secretarial software interface for managing contacts. The top navigation bar includes the Eazzy logo and a menu with options: Contact, Contact Address, Contact Persons, Cust.Companies, Cust.Foundations, Cust.Funds, and Cust.Trusts. Below the navigation bar, there are tabs for Save, Delete, Filing, and Quit. The main content area is divided into two columns. The left column contains a form for 'Contact Name' with fields for Incorporation Name, Contact Code (K00001), Type (Introducer), Department, Address 1, Address 2, Address 3, PO Box, Town, State, Country (United Kingdom (UK)), Office Phone, Mobile Phone, Fax, Company Email, Web Site, Main Contact (Mrs Jenna ROLLING), Updated Date (17/09/2021), and Creation Date (21/06/2021). The right column contains a form for 'Introduced by' with fields for Group Name, Trading Name, Type of Service, Business Regist. (BRN12349), VAT No (VAT12349), VAT Type (Normal), Currency (MUR), Geographical Zone (Africa), and Language (French). Below the 'Introduced by' form, there is a section for 'Account Representat.' with a dropdown menu showing 'DE MAROUSSEM Sophie' and a table with columns for 'Account Representative' and 'Job Title'. The table lists 'DE MAROUSSEM Sophie' as the Account Representative and 'Manager - Marketing & Communication' as the Job Title.

Manage all contacts in this section. Typical contacts would be contacts such as business introducers working with the Business Development or Marketing Teams

- Get a 360-degree view of the business they brought to your company
- Manage follow ups
- Manage and renew important agreements with the indexing of documents
- Integrated DMS function to manage all documents linked to contacts and save them in your contacts dataroom
- Generate and follow quotes by status
- Generate reports



Eazzy Corporate Secretarial

Default Features

Natural Persons Management

The screenshot displays the Eazzy Corporate Secretarial interface for managing natural persons. The top navigation bar includes the Eazzy logo and a menu with options: Save, Delete, Filing, Quit, Statutory & Other Docs, and Update Group Structure. Below this, a sub-menu shows 'Natural Person' as the active tab, with other options like Addresses, Change of Name, Investments, Meetings Attended, and 360 View.

The main form is titled 'NATURAL PERSON' and contains various fields for personal information:

- Person ID:** P00056
- Title:** Mr
- Surname:** BENOIT
- Usual Forename:** Xavier
- Full Forename:** Xavier Claude Jacques
- Maiden Name:** (empty)
- Email:** (empty)
- Address:** Rue 1
- Town:** Moka
- Country:** Mauritius
- Geographical Zone:** (empty)
- Source of Funds:** (empty)
- Employed by:** (empty)
- Occupation:** (empty)

Additional fields and options include:

- PEP:** (checkbox)
- Adverse report:** (checkbox)
- Date Disabled:** (empty)
- Date of Birth:** (empty)
- Date of Death:** (empty)
- Date Aware of Change:** (empty)
- Home Phone:** (empty)
- Mobile Phone:** (empty)
- Work Phone:** (empty)
- ZIP:** (empty)
- Tax Resid. Country:** (empty)
- Tax Identif. No:** (empty)
- Employee Name:** (empty)

On the right side, there is a photo of a man and a section for 'Risk Rating' and 'Compliance Off.' (checkbox). At the bottom right, a dropdown menu shows 'Group Structure of BENOIT Xavier Claude Jacques'.

Manage Natural persons' information and their KYCs in this section. Natural persons in the system are the stakeholders directly linked to your client entities

- Insert all the personal information & manage KYC documents, while following renewal alerts (passports, KYC documents)
- 360 View of the person's links as an officer, a signatory or a shareholder or other related links s(he) might have with another legal person or client entity in the system
- Manage Addresses, Change of name, Investments
- With the integrated DMS, manage and save documents linked to persons in the person's filing section.
- Insert your own Document Templates to be generated with naming conventions to fasten your administrative work
- Create, Upload, Edit Indexed Forms for documents linked to persons and from which you will have renewal alerts.
- Create follow ups and view alerts of tasks to be done for a natural person
- Generate Reports



Eazzy Corporate Secretarial

Default Features

Legal Persons Management

The screenshot displays the Eazzy Corporate Secretarial interface for Legal Persons Management. The interface has a blue header with the Eazzy logo and a navigation bar with various icons and labels: Save, Delete, Filing, Quit, Registers, and Update BO & Group Structure. Below the navigation bar, there is a horizontal menu with labels: Legal Person, Documents, Follow-up, Addresses, Officers, Banks, Investments, Change of Name, Related Persons, 360 View, Jobs, and Billing. The main form area contains several input fields and dropdown menus for company information. The form is organized into two columns. The left column includes fields for Company Name (X COMPANY LTD), Group Name, Company Status (Active), Company Nature (Private), Listing Status, Company Category (Domestic Company), Company Type (Legal Person), Sector, Nature of Business, and Remarks. The right column includes fields for Company ID (P00057), Date of Incorporation (01/01/2021), Incorporation No (ZZZ), Regulator Status, Risk Rating, Business Regist., Tax Identif.No, VAT No, VAT Type, Country of Incorporation (Mauritius), Date of Commencement Business, Balance Sheet Date (December), Date Dissolved, Last Compliance Review, and Next Compliance Review.

Manage Legal Persons in this section. Legal persons are the stakeholders linked to your client entities.

- Insert all the information about the legal persons by type of entity
- Create Company Officers: Directors for example, Shareholders, Bank signatories
- Manage, Edit addresses, investments, meetings & related persons linked to the legal person
- Create, Upload, Edit or Generate documents linked to persons which will be automatically saved in the person's filing section.
- Insert your own templates to be generated with naming conventions to facilitate your admin work
- Create & Edit Indexed Forms for documents linked to persons and from which you will have renewal alerts.
- Create follow up and view alerts of tasks to be done for a legal person
- Generate Reports



Eazzy Corporate Secretarial

Default Features

Companies/Trusts/Foundations/Funds Management

The screenshot displays the Eazzy Corporate Secretarial software interface. The top navigation bar includes icons for Save, Delete, Filing, Quit, Registers, Statutory & Other Docs, Update BO & Group Structure, and Delete Imported Shares. Below this is a menu bar with options: Entity, Statutory Info, Constitution, Documents, Follow-up, Corporate Actions, Share Transactions, Meetings, Billing, and 360 View. The main form is titled 'Company Name' and contains various fields for company information. The 'Company Name' field is set to 'DEMO CO LTD'. Other fields include 'Group Name' (GROUP XYZ), 'Linked Contact' (HEDGE TRADING CO LTD), 'Company Status' (Active), 'Regulator Status' (Live), 'Company ID' (E00071), 'Date of Incorporation' (25/01/2022), 'Incorporation No' (250122), 'Registrar Status' (Live), 'Company Nature' (Private), 'Risk Rating' (Medium), 'Country of Incorporation' (Mauritius), 'Listing Status' (Not Listed), 'Business Regist.' (BRN122), 'Date of Commencement Business' (01/01/2022), 'Company Category' (Global Business Company), 'Tax IdentifNo' (TIN122), 'Balance Sheet Date' (December), 'Company Type' (Limited by Shares), 'VAT No' (VAT122), 'Date Dissolved', 'Sector' (Commercial), 'VAT Type' (Exempted), 'Last Compliance Review' (01/01/2022), 'Nature of Business' (Activities of amusement parks and theme parks), 'Next Compliance Review' (01/01/2023), 'Remarks', 'Team' (TEAMA), 'Administrator' (BENOIT Xavier, GANGOO Hema), 'Manager' (DE MAROUSSEM Sophie), 'Accountant' (GIRAUD Pascal), 'Compliance Officer' (REY Natacha), 'MLRO' (DE MAROUSSEM Sophie), and 'MLRO Deputy' (GANGOO Hema).

Manage any type of client entity and ensure that you have a unique source of truth about your customers.

- Manage and Update entities corporate information: Statutory, Constitutional, Licenses, Officers, Bank accounts, Charges, Loans, Investments etc. and generate related registers
- Manage Share Transactions, share capital, members, members history, generate shareholder registers and share certificates
- Manage Meetings, associated documents and participants
- Manage Follow Ups and Tasks related to the follow up in relation to the services you provide to customers
- In built DMS to Create, Upload, Edit or Generate any type of documents including emails which will be automatically saved in the filing section.
- Insert your own templates to be generated with naming conventions to facilitate administrative work
- Create & Edit Indexed Forms for documents and from which you will have renewal alerts.
- Generate all types of registers and statutory documents
- UBO & Group Structure (for Ordinary Shares)
- Billing Information
- Get a 360 view about the client entity and how it is linked to other persons or entities in the system
- Reports



Eazzy Corporate Software

Default Features

Integrated Filing & Documents Management

The screenshot displays the Eazzy Corporate Software interface. The top navigation bar includes the Eazzy logo and a menu with options: Save, Delete, Filing (selected), Quit, Statutory & Other Docs, and Update Group Structure. Below the navigation bar, there are tabs for Natural Person, Addresses, Change of Name, Investments, Meetings Attended, and 360 View. The main content area is titled 'FILING' and contains a search bar with the text 'Enter some text. To Find files created in 2021 with the word TEST in the file name: \$date=2021 & TEST. Start with + to search into sub folders'. Below the search bar, there are buttons for Refresh, Open Files, ZIP Files, New Document, New Indexing Form, Copy, Paste, Delete, and Synchronize. A table lists files with columns for Name, Date Modified, Size KB, and Path. The files listed are: Identity Document- Identity Card (B0101014444444- 2022-01-17- Expiry date 2022-02-01- Check Yes (DOXB220117-39).zzf), 2022-01-17 - Let demande proof of address (XB220117-38).docx, and Pdf ABSA Rate (XB220117-36).pdf.

	Name	Date Modified	Size KB	Path
<input type="checkbox"/> Open	Identity Document- Identity Card B0101014444444- 2022-01-17- Expiry date 2022-02-01- Check Yes (DOXB220117-39).zzf	17/01/2022 03:01	Document	\\PERSONS\\Natural Person\\BENOIT_P00056\\Files\\a) CDD
<input type="checkbox"/> Open Download	2022-01-17 - Let demande proof of address (XB220117-38).docx		NOT FOUND	\\PERSONS\\Natural Person\\BENOIT_P00056\\Files\\a) CDD
<input type="checkbox"/> Open Download	Pdf ABSA Rate (XB220117-36).pdf		NOT FOUND	\\PERSONS\\Natural Person\\BENOIT_P00056\\Files\\a) CDD

The screenshot displays the SharePoint interface for the 'DEMO E.CORPORATE' site. The left navigation pane shows the 'ZZCORP. Directory' tab selected. The main content area shows a list of documents under the path 'Documents > ZZCORP > TEAMA > COMPANIES > EAZZY LTD_E00007 > Files > h) Registers > 2021'. The documents listed are: EAZZY LTD - E00007 - Company Profile - 2021-08-11 (SDM210811-4).xlsx, EAZZY LTD - E00007 - Register of Directors as at - 2021-08-17 (SDM210817-4).xlsx, EAZZY LTD - E00007 - Register of Directors as at - 2021-08-24 (SDM210824-19).xlsx, and EAZZY LTD - E00007 - Register of Directors as at - 2021-08-24 (SDM210824-3).xlsx.

Name	Modified	Modified By
EAZZY LTD - E00007 - Company Profile - 2021-08-11 (SDM210811-4).xlsx	August 16	Sophie DE MAROUSSEM
EAZZY LTD - E00007 - Register of Directors as at - 2021-08-17 (SDM210817-4).xlsx	August 17	Sophie DE MAROUSSEM
EAZZY LTD - E00007 - Register of Directors as at - 2021-08-24 (SDM210824-19).xlsx	Yesterday at 16:45	Sophie DE MAROUSSEM
EAZZY LTD - E00007 - Register of Directors as at - 2021-08-24 (SDM210824-3).xlsx	Yesterday at 13:20	Sophie DE MAROUSSEM

- The Documents' Management System (DMS) is integrated within the software and is found in the same screens as your data
- Automatic creation of filing directories path and folders/subfolders in either SharePoint or Windows Explorer with securities
- Generate, Create, Search, Modify, Save and Classify specific documents which are generated directly from the software
- The DMS may be linked to either an O365 SharePoint site or to Windows Explorer
- Benefit from SharePoint features: concurrent document sharing, alerts, send comments to colleagues, versioning, autosaved documents



Eazzy Corporate Software

Default Features

Follow ups Management

The screenshot displays the Eazzy Corporate Software interface. At the top, there's a blue header with the 'eazzy' logo. Below it, a navigation bar contains filters for 'Assigned by', 'Assigned To' (DE MAROUSSEM Sophie), 'Task' (type here), 'Date From' (14/01/2022), 'Date To' (01/02/2022), 'Type', 'Priority', 'Status' (In Progress), and checkboxes for 'Display Follow-up' and 'Display WF Events'. A 'Click to Refresh Report' button is also present. The main area is divided into a left sidebar with a task list and a right panel for task details. The task list shows a hierarchy: 'JOB' > 'X COMPANY LTD - R22-0026' > 'WF LEGAL DISTRICT/INTERMEDIATE/INDUSTRIAL COURT' > 'Mise en Demeure against Government (@from BENOIT Xavier) (W)' with a red warning icon and text 'Attentionn voir mr xxx pour cela (@from BENOIT Xavier) (F/H/G)'. The right panel, titled 'TO DO', shows details for the selected task, including 'From' (DE MAROUSSEM Sophie), 'Client Name' (DE MAROUSSEM Sophie), 'Linked To Item' (D0004), 'Contact Person', 'Choice', 'To Do', 'Assigned To' (DE MAROUSSEM Sophie), 'Date' (24/01/2022 11:43), 'Due Date' (25/01/2022 11:43), 'Planned Start Date' (24/01/2022 11:43), 'Planned End Date' (25/01/2022 11:43), and 'Action Taken'.

- View and manage all tasks or follow ups from initiated workflows or tasks assigned to you and for different specific themes: person, client entity, job etc.
- Create tasks or sub tasks and assign them to yourself or your colleagues
- View the progress on assigned tasks to your colleagues or update your own
- Generate reports

Reports :

The software includes a variety of inbuilt reports by category:

- Persons, Client entities, Requests, Timesheets and Billing

Other Features:

- User Journal
- Manage service providers linked to your activity
- Manage your software parameters easily



Eazzy Corporate Software

List of Features

<i>Eazzy Corporate Secretarial - Features</i>	
Main Software	
Main Software - Dashboard	
<i>Counters</i>	✓
<i>My Portfolio</i>	✓
<i>My Follow Ups</i>	✓
<i>My Likes</i>	Coming Soon
<i>Validation Process</i>	✓
<i>Link to You tube tutorials</i>	✓
Main Software - Contacts Database	
<i>CRM</i>	✓
<i>Contacts Database</i>	✓
<i>Managing Multiple Addresses</i>	✓
<i>Managing Contact Persons</i>	✓
<i>Managing of Quotes</i>	Coming Soon
<i>Management of follow ups</i>	✓
<i>Clients brought by contact</i>	✓
<i>Integrated DMS</i>	✓
<i>Reports</i>	✓
Main Software - Natural Person Management	
<i>Person Information, photo, compliance review, risk level, linked roles etc</i>	✓
<i>Indexing Important documents and manage Expiry dates</i>	✓
<i>List of Appointments</i>	✓
<i>List of Authorised Signatories</i>	✓
<i>Share ownership detained</i>	✓
<i>Principal of</i>	✓
<i>Follow ups</i>	✓
<i>Managing Multiple Addresses</i>	✓
<i>Name change function</i>	✓
<i>Investments made</i>	✓
<i>Meetings Attended</i>	✓
<i>360 view linked to Charges, Alternates, Beneficiary of, related person role</i>	✓
<i>Share ownership structures</i>	✓
<i>Integrated DMS - upload, generate, create, edit.. Documents</i>	✓
<i>Filing and saving of Outlook Emails - Calendar events</i>	✓
<i>Reports</i>	✓



Eazzy Corporate Software

List of Features

Main Software - Legal Person Management	
Person Information, compliance review, risk level, linked roles etc	✓
Indexing Important documents and manage Expiry dates	✓
List of important Documents	✓
Managing Multiple Addresses	✓
Follow ups	✓
Managing Officers of legal person	✓
Managing Bank accounts of legal person	✓
Investments made by legal person	✓
Name change function	✓
Related Person	✓
360 view : Appointments, Signatory, Investee of, Meetings Attended, Party of, Principal of, Share Ownership	✓
Share ownership structures	✓
Integrated DMS - upload, generate, create, edit.. Documents	✓
Filing and saving of Outlook Emails - Calendar events	✓
Reports	✓
Company & Funds Management	
Create and Manage any type of Company: view of entity as a company profile	✓
Management of Statutory and Constitution information	✓
Indexing Important documents and manage Expiry dates	✓
Manage Follow ups on each client, assign tasks, view tasks assigned, deadlines	✓
Corporate Actions to manage Addresses, Officers, Licences, Bank Accounts, Beneficiary Banks, Charges, Loans, Debentures, Investments, Intellectual Property, Change of Name	✓
Share ownership Management, share certificates generation, UBO structure	✓
Meetings Management - sending of invitations, managing meeting documents	✓
Related Person	
Integrated DMS with Windows Explorer or Sharepoint	✓
Filing and saving of Outlook Emails - Calendar events	✓
Generation of registers	✓
360 view links to view other linked roles	✓
Reports	✓



Eazzy Corporate Software

List of Features

Trusts and Foundations Management	
<i>Manage Trusts and Foundations</i>	✓
<i>Indexing Important documents and manage Expiry dates</i>	✓
<i>Manage Follow ups on each client, assign tasks, view tasks assigned, deadlines</i>	
<i>Addresses</i>	✓
<i>Management of Officers</i>	✓
<i>Management of Principals</i>	✓
<i>Management of Investments</i>	✓
<i>Management of Banks accounts</i>	✓
<i>Meetings Management - sending of invitations, managing meeting documents</i>	✓
<i>Change of name</i>	✓
<i>Integrated DMS with Windows Explorer or Sharepoint</i>	✓
<i>Filing and saving of Outlook Emails - Calendar events</i>	✓
<i>Generation of registers</i>	✓
<i>360 view links</i>	✓
<i>Reports</i>	✓
Service Providers	
<i>New Service Provider</i>	✓
<i>By type of Provider</i>	✓
<i>Banks & view banks accounts opened</i>	✓
<i>Regulators and linked licenses</i>	✓
<i>Integrated DMS</i>	✓
Parameters	
<i>Share deletion and Maintenance</i>	✓
<i>Editing Drop Down Lists in the Software (lists, finance and operations)</i>	✓
<i>Manage Services, tasks, grades lists</i>	✓
<i>Manage Employees and their access rights in the system</i>	✓
<i>Insert Templates with naming conventions</i>	✓
Reports	
<i>Many reports by theme</i>	✓
<i>Export to a spreadsheet or csv</i>	✓
<i>Customisable reports or dashboard</i>	✓



Eazzy Corporate Software

List of Features

File & Document Management	
<i>Automated filing directories (customised or standardised) by theme</i>	✓
<i>Folders and subfolders duplication</i>	✓
<i>Update yearly and yearly/month files in 1 click</i>	✓
<i>Creation/renaming of folders with rights only</i>	✓
<i>Links to Sharepoint or Windows Explorer</i>	✓
<i>Edit, File, Open, Create any type of Office document</i>	✓
<i>Zip, Copy, Paste, Delete, drag and drop documents</i>	✓
<i>File & Document Bin</i>	✓
<i>Indexing Important documents and manage Expiry dates</i>	✓
<i>Upload templates with or w/o naming conventions</i>	✓
<i>Manage versions (sharepoint)</i>	✓
<i>Automatic documents references</i>	✓
<i>Naming Conventions for documents</i>	✓
<i>Filing and saving of Outlook Emails & Calendar events</i>	✓
<i>Filing email attachments</i>	✓
<i>Renaming of files</i>	✓
<i>Create hyperlinks</i>	✓
<i>Create Folder Trees</i>	✓
<i>Move a folder and its files/documents</i>	✓
<i>Secure a top-level folder in the directory</i>	✓
<i>Point to a folder in the directory on a disk location</i>	✓
<i>Customisation of the filing directory</i>	✓
<i>Security via Active Directory Windows or Security via Sharepoint Permissions (depends on connection type)</i>	✓



Eazzy Corporate Software

Add on Modules

Job/Request Management Module

The screenshot displays the Eazzy software interface for the Job/Request Management Module. The top navigation bar includes the Eazzy logo and a menu with options: Save, Delete, Filing, Quit, STATUS/PROFORMA, and WORKFLOW. Below this, a sub-menu shows Request, Timesheets, Expenses, Proforma, Workflow Events, and Workflow Linked. The main form is divided into several sections. The top section contains fields for Company Name (X COMPANY LTD), Contact Person, Category of Service (General Administration), Service (General Administration), Annual Invoice No, Annual Item, Rate (2 500.00), USD, Fees (0.00), Date (17/01/2022), Request Ref (R22-0026), Type of Request (Fixed), TS Billable (No), Deadline, Status (In Progress), Received by, Last Proforma, and Process Name (LEGAL DISTRICT/INTERMEDIATE/IT). The middle section includes Request Issued By (BENOIT Xavier), Department, Manager, Team Leader, and Consultants (ADMINISTRATOR Orizzon, BENOIT Xavier, DE MAROUSSEM Sophie). The bottom section features a Client to Bill field, Invoice % (0), and a table with columns for Client and X COMPANY LTD.

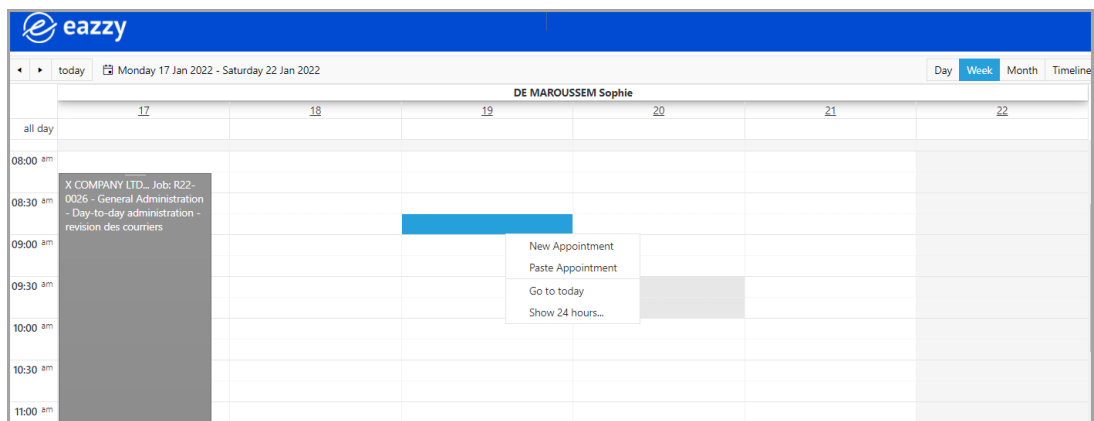
- Create all client requests for your services in the system.
- Import your list of services, sub tasks, fixed fees, employee grades and fixed services billing rates in the system
- Follow the different status on jobs: On Hold, Cancelled, In Progress, Completed, Cleared.
- Analyse jobs: per client, per type of service, per user/team, by status
- Compare the number of jobs provided to your customers and the related fixed fees or time spent value linked to timesheets
- View timesheets related to jobs by employee
- Profitability reports based on fixed fee jobs or change/adjust recoverability on variable fee jobs (per employee/per job)
- Link a job to a workflow with the automated assignment of tasks to team members and view the job work in progress
- Initiate the invoicing process from the request module directly
- Generate reports



Eazzy Corporate Software

Add on Modules

Timesheet Management Module:



The screenshot displays the Eazzy Timesheet Management Module interface in table view. The table has columns for Request No, Employee Name, Detail of Works, Intervent Date, Duration Mins, Duration Hrs, Hourly Rate, Amount to Bill, Qty Hrs Billed, Amount Billable, Qty Hrs Work Off, Amount Work Off, Recovera, Remarks, TS Submitter, TS Validated, TS Cleared, Proforma Date, Invoice Date, and TS_EXP. The table shows data for 'R22-002' by 'DE MAR' on '2022/01/17' for 'Day-to-d' work. The total amount to bill is 731.25, and the total amount billed is 33.33. The table is filtered by 'TS-EXP to be Cleared' and 'TS-EXP to be Cleared Undo'. The table is sorted by 'Request No' and 'Employee Name'. The table has a total row for 'Total DE' and a total row for 'Total Se'.

Request No	Employee Name	Detail of Works	Intervent Date	Duration Mins	Duration Hrs	Hourly Rate	Amount to Bill	Qty Hrs Billed	Amount Billable	Qty Hrs Work Off	Amount Work Off	Recovera	Remarks	TS Submitter	TS Validated	TS Cleared	Proforma Date	Invoice Date	TS_EXP
R22-002	DE MAR	Day-to-d	2022/01/17	585.00	9.00	75.00	731.25	33.33	2500.00	23.58	1768.75		revision c	2022/01/17	2022/01/17	2022/01/17	2022/01/17		TS
		Total DE		585.00	9.00		731.25	33.33	2500.00	23.58	1768.75	370.33							
		Total Se		585.00	9.00		731.25	33.33	2500.00	23.58	1768.75	370.33							

- Record the time spent for each job by company you work for: by type of service/task, by company, by employee, on which date ..
- Fill in your timesheets easily as would in an outlook calendar with many inbuilt functions to ease the process and not spend time doing so, such as copy paste, etc.
- In built Submission and validation processes (hierarchy validation)
- Various inbuilt reports to analyse the time spent by employees on jobs and tasks



Eazzy Corporate Software

Add on Modules

Process/workflow Management Module:

eazzy

Save

Delete

Filing

Quit

STATUS/PROFORMA

WORKFLOW

Request

Timesheets

Expenses

Proforma

Workflow Events

Workflow Linked

Enter some text like Process Name or Assigned Person or Status

Refresh

Export XLS

Event Name	Event Status	Your Comment	Assigned To
LEGAL DISTRICT/INTERMEDIATE/INDUSTRIAL COURT			
Advise Client	Closed	ok c'est fait pas de soucis	RQ_ADMIN,
Mise en Demeure against Government	In Progress		RQ_ADMIN,
Plaint	Locked		RQ_ADMIN,
Demand of Particulars	Locked		RQ_ADMIN,
Answer to Particulars	Locked		RQ_ADMIN,
Demande of Further and Better Particulars	Locked		RQ_ADMIN,
Answer of Further and Better Particulars	Locked		RQ_ADMIN,
Plea	Locked		RQ_ADMIN,

The workflow module may be linked to the job module to link a process associated with a type of job/service.

- Ensure that all employees follow your company procedures/workflows by linking them to your jobs/requests
- Create your own and unique processes
- Import processes in EAZZY CORPORATE SECRETARIAL using a simple excel sheet we teach you how to create
- Workflows may send automated emails, SMS, documents and link various users until the job workflow is completed.



Eazzy Corporate Software

Add on modules

The Billing Module :

The screenshot displays the Eazzy Billing Module interface. At the top, there is a blue header with the Eazzy logo. Below the header is a toolbar with icons for Save, Delete, Filing, Quit, Print Proforma PDF, Approve Proforma, and Cancel Proforma. The main area is divided into two sections: 'A- Invoice Items' and 'B- Invoice Annexe'. The 'A- Invoice Items' section contains fields for Client Name (X COMPANY LTD), Client Code (P00057), Client PO No, BRN No, VAT No, Company Name (EAZZY LTD), Company Bank, Job Type (Request), Proforma No (2022-000040), Prof.Date (17/01/20), Invoice/Credit Note (Proforma), Status (In Progress), Transaction No, Date (17/01/20), Period From, and Annual Invoice checkbox. The 'B- Invoice Annexe' section contains fields for Address 1, Address 2, Address 3, PO Box, Town, Country, Sent to, Copy to, and Signature. At the bottom, there is a summary section with fields for Total VAT Excl (2 500.00), VAT % (0), VAT Amount (0.0000), VAT Type (Exempted), Due Date, Exchange Rat (1), Link to Credit Note-In, Proforma Created (BENOIT Xavier), Invoice Created, and Credit Note Created.

- Create manual invoices that are issued independently of client request.
- Invoices per type of client request (job). In this case, there may be 2 modes of invoicing:
 - Fixed rates
 - Variable rates depending on Timesheets and associated expenses.
- Several billing entities in one database is possible
- Generate the Proforma Invoices, follow the validation process up to the final invoice
- Print Proforma/invoices with your billing details automatically
- Option to transfer proformas or invoices to your accounting software: Pastel/QuickBooks etc.



Eazzy Corporate Software

Add on modules

The Compliance Module :

The screenshot shows the Eazzy Compliance Module form. The form is divided into several sections: Company Name (SHARE TRANSACTIONS CO LTD), Contact Person, Type of Job (ROUTINE), Service (Company Due Diligence), Annual Invoice No, Description, Request Issued By (ADMINISTRATOR Orizzon), Manager (DE MAROUSSEM Sophie), Administrator, Date (11/07/2022), Request Ref (R2207-0204), Type of Request (Fixed), Status (In Progress), To Start/To End (11/07/2022), and Process Name. The form also includes a table for Client to Bill with columns for Client, Inv.Code, and Invoice %.

The screenshot shows the Eazzy Compliance Module table. The table has columns for Event Name, Event Status, Your Comment, Assigned To, Day Duration, Deadline Date, Deadline Time, Completion Date, Completion Time, and by. The table contains several rows of data, including a header row and several rows of compliance events.

Event Name	Event Status	Your Comment	Assigned To	Day Duration	Deadline Date	Deadline Time	Completion Date	Completion Time	by
COMPLIANCE CHECK COMPANY SHARE TRANSACTIONS CO LTD									
The nature of his business	Closed		ADMIN,	0	11/07/2022	09:00	11/07/2022	08:48	ADMIN
His ownership and control structure	Closed	'Statutory Document/Business Plan &	ADMIN,		11/07/2022	09:00	11/07/2022	09:51	DE M.
Identify the customer and verify his identity by obtaining the following information	Closed		ADMIN,		11/07/2022	09:51	11/07/2022	10:51	DE M.
Original or certified true copy of the Certificate of Incorporation or Certificate of Registration as applicable	Closed	'Certificate/Certificate of Incorporation' / 'Certificate/Certificate of Registration' f	ADMIN,		11/07/2022	10:51	11/07/2022	10:54	DE M.
Details of the registered office address and principal place of business	In Progress		ADMIN,		11/07/2022	10:54			
Company registry search, including confirmation that the person is not in the process of being dissolved	Locked		ADMIN,						
Personal visit to principal place of business	Locked		ADMIN,						
Original or certified true copy of the register of directors	Locked		ADMIN,						
Original or certified true copy of the register of shareholders/members	Locked		ADMIN,						

- Based on the client entity's ownership structure, compliance check dates coming up and in line with the list of Documents required by the regulators for compliance reviews and due diligence, Eazzy will analyse which documents are missing and you will only need to update them and follow the in-built workflow.
- Compliance reviews are organized and structured for you to proceed smoothly.
- Ensure that you do not miss out anything and know the who has done documents updates in the system for the compliance checks.



Thank you