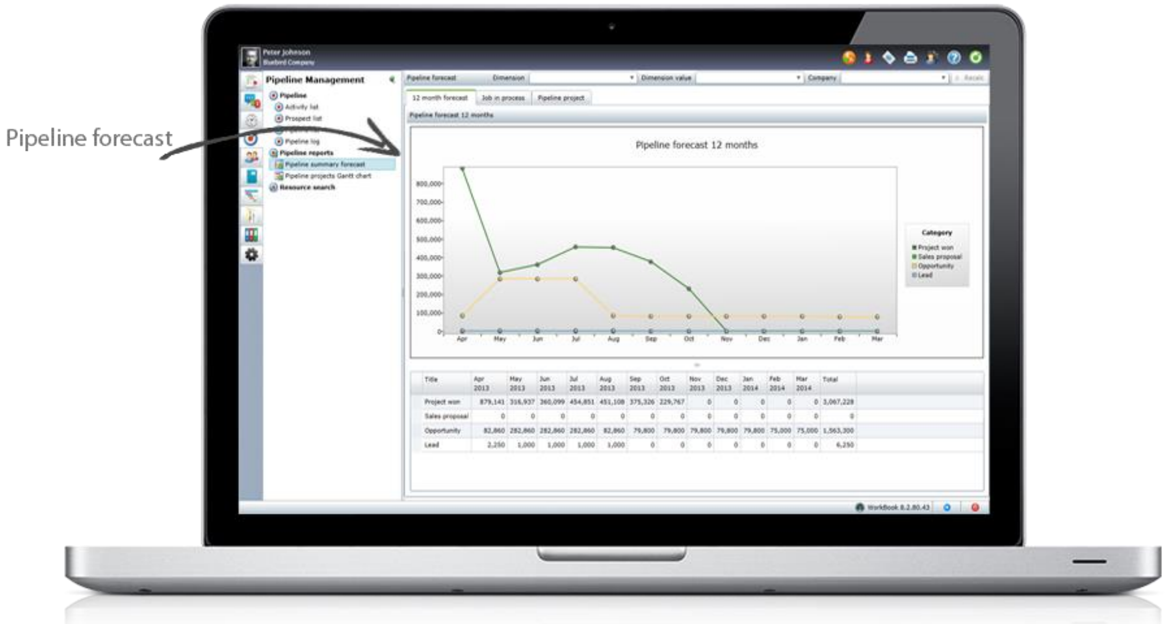
CRM

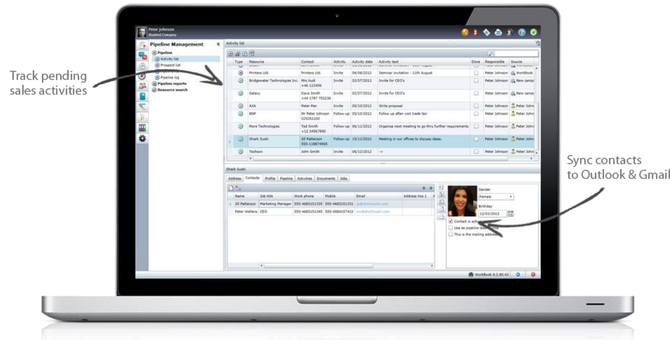


Securing the next generation of clients and making sure that your sales funnel is populated with new projects is key to succeeding. We know that keying in data to a system isn't the funny part, so we've made sure that adding new prospects and updating activities is really, really easy.

Tracking down who is likely to buy your products or services can be hard work. You try to call your contact numerous times, leaving messages and sending emails. We know how it is. But eventually you get a response and that moment is every sales person's kick of the day. They want to talk to you and perhaps they want to purchase your product or services. You want to brag about it because you finally got them to the table.

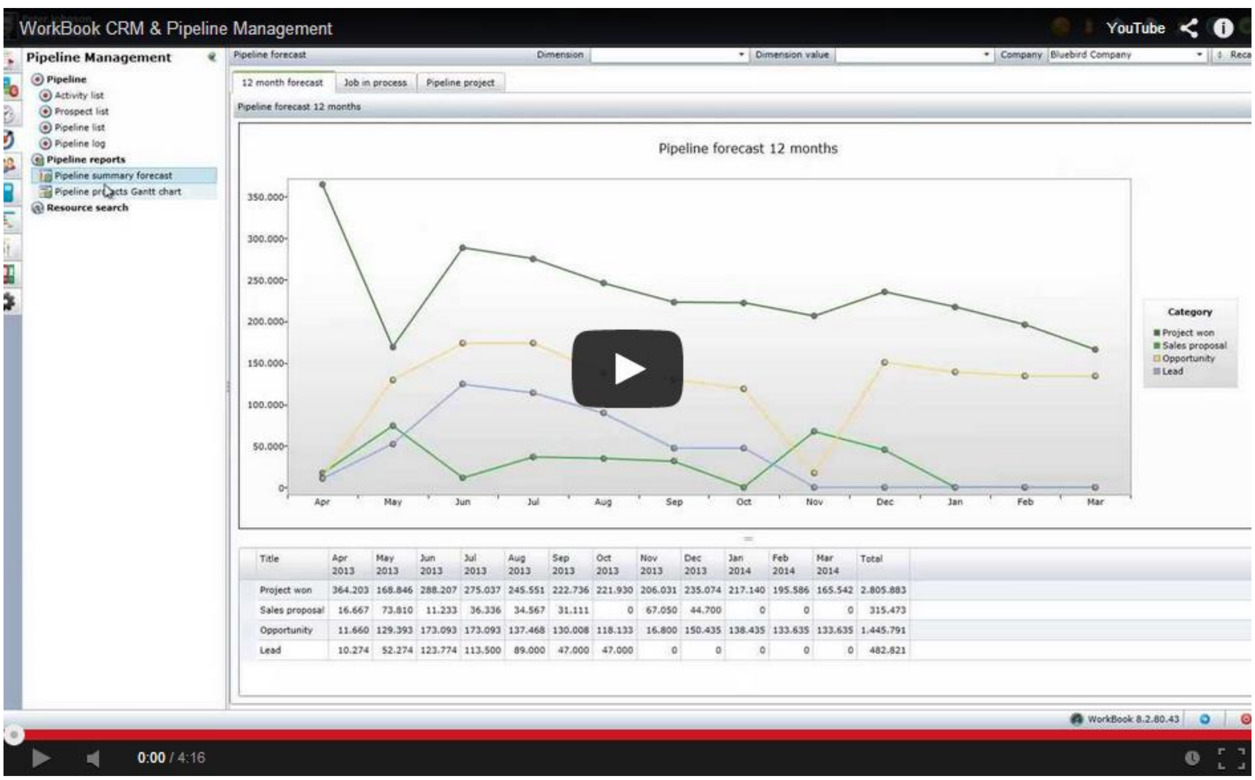
This is an exciting development for our company," says Raymond Siu, Veritas' chief financial officer. "We are very much looking forward to the gains in efficiency and the rapid implementation of a cloud-based, industry-specific solution. [Read full story.]

If you're looking for an easy tool, WorkBook CRM does the job.



Although the CRM module has a great feature list, we are not bragging that it's a fully blown CRM system that will do it all. But if you're looking for an easy tool, WorkBook CRM does the job. Also, it integrates to the WorkBook Project & Resources module so you don't have two separate systems and you don't have to re-key data. You simply follow your opportunities from start to finish.

Watch this short video that will take you through the CRM & Pipeline Management module.



CRM KEY FEATURES

EASY ADDING PROSPECTS AND CONTACTS

We've made it so easy because we also hate filling in long forms.

EMAIL IMPORT (OUTLOOK & GMAIL)

Emails can be imported just by dragging the email to a hot folder (or a label in Gmail). WorkBook will make a suggestion on where to save the email based on who the email is coming from.

ACTIVITIES & FOLLOW-UP LIST

WorkBook will automatically show you a list of your activities that needs follow-up.

SAVING FILES

You can save any file, regardless of file size or type.

ADDING PIPELINES WITH WEIGHTED REVENUE

A weighted pipeline will show you the potential cash flow of your business.

INTEGRATION TO ACTIVECAMPAIGN FOR EMAIL MARKETING

Doing email marketing then you need the ActiveCampaign plug-in. In ActiveCampaign you'll be able to run your email campaigns, split testing etc.

LOGGING PROGRESS OF SALES ACTIVITIES

Whenever you speak to your client or prospect, simply log what the call was all about and when to follow up. WorkBook will remind you when the follow up is due.

PIPELINE FORECASTING / CASH-FLOW FORECASTING DASHBOARD FOR THE NEXT 12 MONTHS

You'll be able to see not only what the potential new business is, but also the value of your current projects.

MANAGE CONTACTS ON LISTS (AN EASY WAY TO SENT OUT A CHRISTMAS GREETINGS!)

It's the same thing every year. Finding out who are to receive the Christmas greeting can be a lot of work.

WorkBook remembers the list from last year making it easy for you to do the changes.

SYNC CONTACTS TO OUTLOOK AND GOOGLE CONTACTS

In that way you only need to create contacts in WorkBook. They will automatically be synced to your email system.

EASY CONVERSION OF A PIPELINE TO A PROJECT

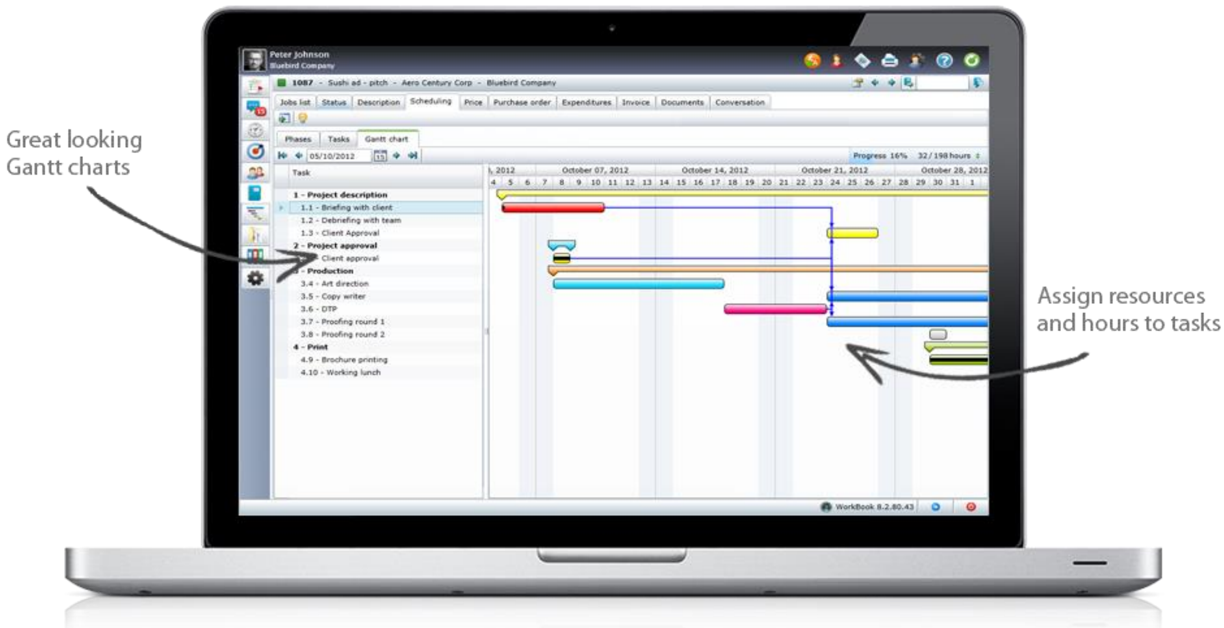
When you've made the sale, just hand it over to the production team. All information will be carried over allowing you to focus on the next sale.

McCANN WORLDGROUP

"We have tested various systems, including many solutions from outside of Denmark, and for me there is no doubt that there is nothing that can do the same as WorkBook," says Heidi Clevin from McCann. Read full story.

WHITE PAPER

PROJECTS & RESOURCES



Project Management is the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals. We believe it's a matter of having the right software to help you define the scope, time, quality and budget.

WorkBook will help you control project costs and make sure that you never miss a deadline.

WorkBook will allow you to do the work break-down structure and to warn you if something is about to go wrong. Furthermore, WorkBook will help you control project costs and make sure that you never miss a deadline.

Watch this video that will take you through the Projects & Resource Management module.

KEY FEATURES

EASY ADDING PROJECTS & TASKS

We've made it so easy because we also hate filling in long forms.

FOLLOW-UP ON TASKS ASSIGNED -> HOURS ALLOCATED -> HOURS USED

Add tasks to your team, give them information on how many hours they are to use and watch how each task progress.

COLLABORATION WITH TEAM MEMBERS AND GET INSTANT NOTIFICATIONS

WorkBook will automatically notify you when a task is done, a new comment has been added or even if a team member request additional time.

SAVING FILES TO PROJECTS AND COMMENT ON THEM

You can save any file, no matter of file size or type and collaborate by posting comments.

UPLOAD BRIEFINGS TO ENSURE ALL TEAM MEMBERS KNOWS WHAT TO DO

Uploading the briefing allows your team to access it and even add comments in the file.

CREATE GREAT LOOKING PRICE QUOTES AND INVOICES THAT CAN BE EMAILED TO THE CLIENT

We understand how important it is to keep your corporate layout and design on your documents. Font type, logo (in high quality), position etc. All elements can be moved around according to your wishes.

ADD ALL COST ELEMENTS TO THE PROJECT

Travel costs, personal expenses, supplier invoices, mileage. All types of purchases can be scanned and added to the job and even go through approval workflows.

INTEGRATION TO EMAIL AND CALENDAR (OUTLOOK AND GMAIL)

Emails can be imported just by dragging the email to a hot folder (or a label in Gmail). WorkBook will save the email on the right client based on who the email is coming from.

REQUEST SUPPLIER QUOTES AND CREATE PURCHASE ORDERS

Ask a supplier for the cost specification on goods and once you are ready to make the order, convert the request form to a purchase order. No need to re-key data.

CREATE GANTT CHARTS AND LINK TASKS (BINDINGS)

Do great looking Gantt charts and even link tasks. Share the Gantt chart digitally with your client through the Client portal.

COLLABORATE WITH YOUR CLIENT THROUGH THE CLIENT PORTAL

You can share Gantt charts, task progress, briefing and files. You can even allow the client to add new jobs and tasks in your system.

FOLLOW-UP ON CLIENT/PROJECT/EMPLOYEE PROFITABILITY

Following your profitability is needless to say, pretty important. WorkBook allows you to track profitability extremely close.

TRAFFIC VIEWS FOR RESOURCE PLANNING INCLUDING CALENDAR VIEW

We give you the right tools to quickly view available capacity, who's doing what and when. WorkBook even synchronizes with user's calendars so you are aware of everything does goes on.

REALLY EASY TIME SHEET/EXPENSE ENTRY ON IPHONE & IPAD APP

Easily fill in your time sheet and expenses when you're on the move.

START & STOP TIMER

Tick, tock, tick, tock. Easily start/stop your time using the timer.

"I believe that we've been able to reduce our administrative operations by 50% since we've adapted the system. To the best of my knowledge, it's the best solution on the market – no other system delivers the same competences". Read full story.

PEOPLEGROUP

FINANCE & ACCOUNTING

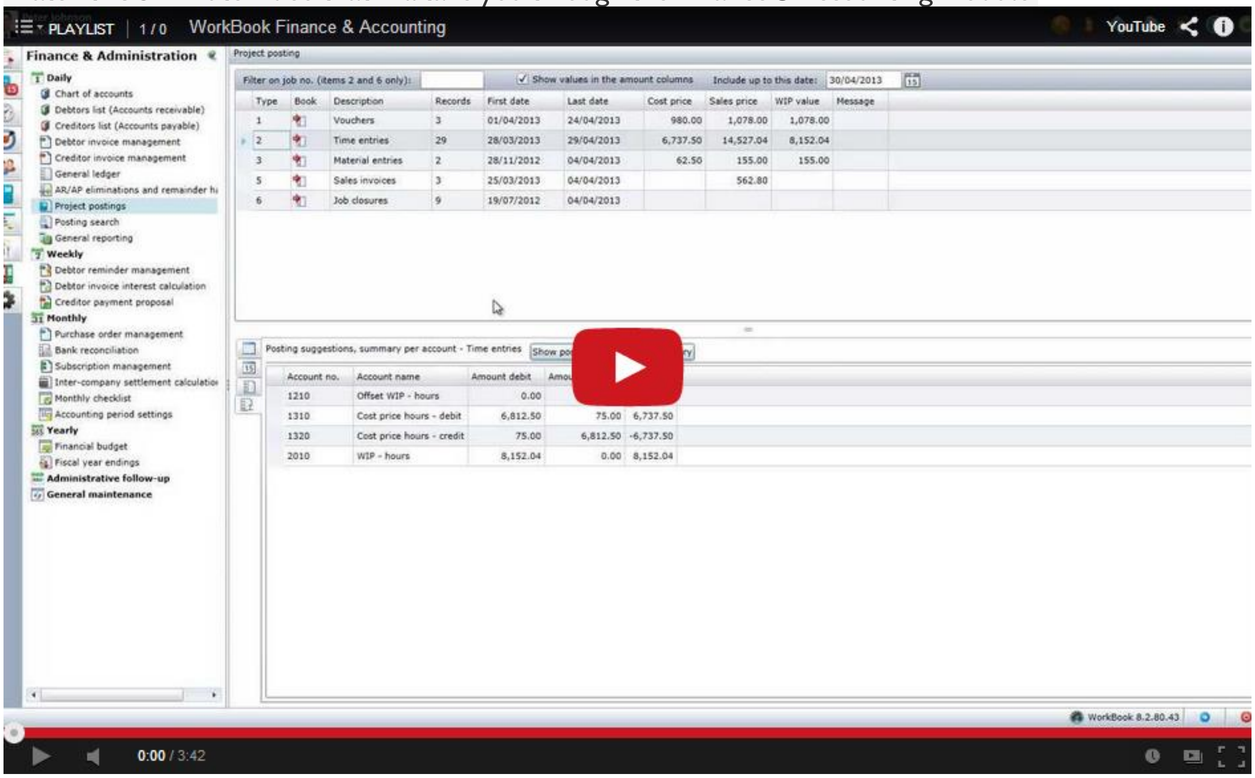
The integrated Finance & Accounting module is really what separates WorkBook from the thousands of other Project Management systems out there. Seeing your business as a whole, from new business to projects & resources and then finally to include operational costs is truly unique and normally only found in very expensive ERP systems.

"I've been approached by numerous software vendors throughout the years but none of the systems they presented had the same level of flexibility, overview and easy access as WorkBook". [*Read full story.*]

bates y&r

You don't have to include the finance module in your plan, but if you're looking for 1 integrated system you should go for it. Sometimes it's necessary to integrate WorkBook to other finance systems such as Sage, Microsoft Business Solutions, SAP. That's no problem either. WorkBook is built on open standards and is easy to integrate to other systems.

Watch this 3 minute video that will take you through the Finance & Accounting module.



KEY FEATURES

CHART OF ACCOUNTS AND EASY JOURNAL ENTRY

You can use the built-in Chart of Accounts or customize it to your needs.

21 BUILT-IN DIMENSIONS + 10 CUSTOM DEFINED DIMENSIONS

A dimension is a way of tagging your data for reporting, filtering and sorting purposes. Compared to other systems, WorkBook has an extensive reporting engine that allow you to run reports in every aspect of your business.

GENERAL LEDGER IMPORTS

If you have data coming in from another source, you are quickly able to setup an import template that you can reuse over and over again. This will save you a lot of time typing in data.

AUTOMATIC POSTING OF PROJECT RELATED COSTS TO SYSTEM ACCOUNTS

You can have WorkBook automatically post project related costs to system accounts. Once it's setup, the posting procedure will simply be done every time, so you don't have to worry about selecting the specific accounts.

ACCOUNTS PAYABLE & ACCOUNTS RECEIVABLE WITH BALANCE AGEING

Run your AR ageing report to analyze who owes you money and for how long they have done so.

CHEQUE CUTTING AND BANK INTEGRATION

Paying your creditors is easy. Once a supplier invoice or employee expense has been approved, you can cut a cheque or pay it through a bank transfer. We have integration with all the banks that our clients currently use and we are continuously adding more.

INTELLIGENT OCR SUPPLIER INVOICE SCANNING AND ELECTRONIC APPROVAL

WorkBook allows you to run your incoming invoices through an OCR tool that will read the content of the invoice and make suggestions on what supplier to post the invoice on.

FLEXIBLE CUSTOMIZABLE FINANCE REPORTS

WorkBook has around 300 reports built-in. If that's not enough you can easily add the Business Intelligence & Report Writer tool that will allow you to create your own reports and dashboards.

ACCOUNTS RECEIVABLE DUE INVOICES REMINDER

You can setup WorkBook to remind your clients about due invoices – automatically. Every client can be setup to be handled differently.

ACCOUNTS RECEIVABLE INTEREST CALCULATION

WorkBook can calculate interest based on a percentage of the amount due + an administrative cost and include this on your next reminder.

BANK RECONCILIATION

WorkBook comes with a bank reconciliation functionality for quickly reconciling your bank account, whether it be manually or automatically via a bank import.

MULTI-COMPANY, MULTI-CURRENCY AND INTER-COMPANY TRANSACTIONS/SETTLEMENT

WorkBook is a true multi-company system with advanced features for doing inter-company transactions. This means that you can share projects and resources between companies.

FLEXIBLE ACCOUNTING PERIOD CONTROL

You can open/close for transactions on time, sales invoices, purchase invoices etc. Effectively, this means that you are able to close a period for time entries but still keep the finances open for entry.

FINANCIAL BUDGETS

Add your budget details and run comparison reports against your budget.

NUMEROUS DATA EXPORTS

All reports and screen-grids can be exported to Excel.

FLEXIBLE SALES TAX AND VAT SETUP

WorkBook has been localized to work with many different countries Tax/VAT rules. The built-in Tax/VAT guide helps to set it up easily.

SOX COMPLIANT

Don't worry. WorkBook is fully SOX compliant. Segregation of duty, Access Rights for Roles, Approvals. Everything.

SUBSCRIPTION MODULE FOR AUTOMATIC BILLING

If you have the need for automatic billing then you can add the billing details into the Subscription module and WorkBook will automatically create invoices when a subscription is due. This features comes in handy if you're billing hosting or licenses.

CREDIT CARD INTEGRATION FOR EXPENSE ENTRIES

Load in the credit card transaction details and see how WorkBook automatically will suggest where to post the records to. It will save you a lot of time.

NUMEROUS VIEWS FOR CONTROLLING AND FOLLOW-UP

There are more than 40 built-in views for controlling and follow-up. Late time sheets, invoices due, supplier invoices for approval etc.

BUSINESS INTELLIGENCE, DASHBOARD & REPORT WRITER ADD-ON

You can easily add the Business Intelligence & Report Writer tool that will allow you to create your own reports and dashboards.

"We chose WorkBook because the system suited our needs from A-Z. We had some pretty tough selection criteria, and it has taken us some time to filter out the candidates. In the end it was clear to us, that there was actually only one vendor to choose. To every point that we had on our requirements sheet, we were presented by a solution from WorkBook. [Read full story.]

ZUPA RECOMMENDED

APPS

iOS Time sheet app

iOS Mileage app

iOS Photo Upload

Windows Phone App

Android App in dev.

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CASE STORIES

PLANS & PRICING