



Projects



Billing



C.R.M



Support Desk



Timesheets

Your Business on
WORKetc



Calendars



Contacts



In Over Your Head

Do you remember as a kid going to the circus and watching the plate spinner in action? At first they start off with two or three plates and everything is smooth. Throw in a fourth plate and things get a bit wobbly. But as the performer keeps adding plates, he must spend more time running from plate to plate just to keep them from crashing to the ground.

This is how most small businesses and teams operate today. At the start it is easy managing a few projects and customers. But as the business grows, things start to become wobbly and more and more time must be spent just keeping it all running smoothly.

This is where WORKetc comes in.

By combining CRM, projects, billing and more into the single business management software, WORKetc helps you stay on top of everything that is going on. It is like an automatic plate spinner for your business.

For example, WORKetc tracks sales leads across your business. When a new customer is won, a ready-to-go project is just a few clicks away. Instantly your team is notified and can start working. As your project passes each milestone, the billing module fires up to create an instant invoice for approval.

This entire workflow, and many more like it, is effortlessly managed by WORKetc, freeing you up to do more great work.

Usual Scenerio



Your Business on WORKetc



“

We have been evaluating ZohoCRM, Salesforce and Microsoft Dynamics but decided to use your system. Here's why... Fair Pricing... Awesome Interface... Complete Functionality...

Jake Mathews
WeDesign.com

”



Why Use WORKetc?

Let's face it, running a business is hard work. You have deals to close, debtors to chase, employees to manage, clients to keep smiling and your reputation to protect.

If you're like most small businesses, you probably run your business from an email program like Outlook and a bunch of excel spreadsheets. This was fine in the early days, but as you've taken on more customers, employees and contractors, your old system just doesn't cut it.

Or, if you're already using web apps like Basecamp or Salesforce, then you would have quickly found that 3 or

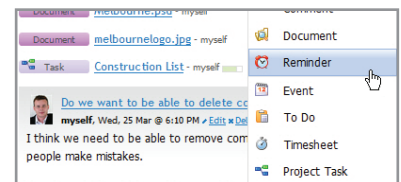
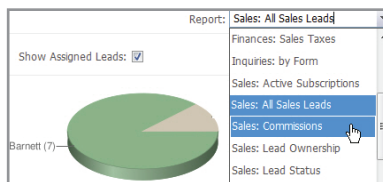
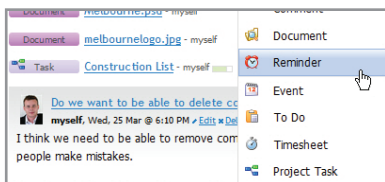
4 or more different apps are needed just to run your business. Expensive and inefficient.

This is where WORKetc comes in. WORKetc is a total small business management software solution. WORKetc helps organize many of your daily activities such as tracking billable time, managing customer support, marketing and invoicing - making them easily accessible through the single interface.

What this means is that we provide you with a number of integrated, internet-based software tools, that all work together to help you better manage your business.

For example, your contractors can sign into your WORKetc web site and record their work hours using the time tracking software. Data from the time sheets is then used by the billing software to generate professional invoices. At the same time, project management software takes this information to update progress. And this all happens in the background. Like magic.

Think about how you accomplish all of the above in your business today. With WORKetc all tools and components are integrated through the single interface.



One Application for Everything

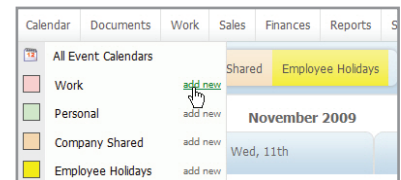
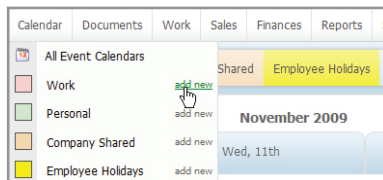
Stop wasting time trying to manage your business with multiple software and web tools. Instantly become more efficient when you switch to WORKetc's combined CRM, Projects, and Billing platform.

Get Back in Control

With your entire business running on the same platform, you can instantly get a birdseye view across everything that is happening in your business.

Easy to Use, Simple to Learn

Making the change to a new system can be frustrating and time consuming. We've focussed on making WORKetc right for small business with intuitive navigation, instructional videos and a "just start using it" approach to training.



Automate and Do More with Less

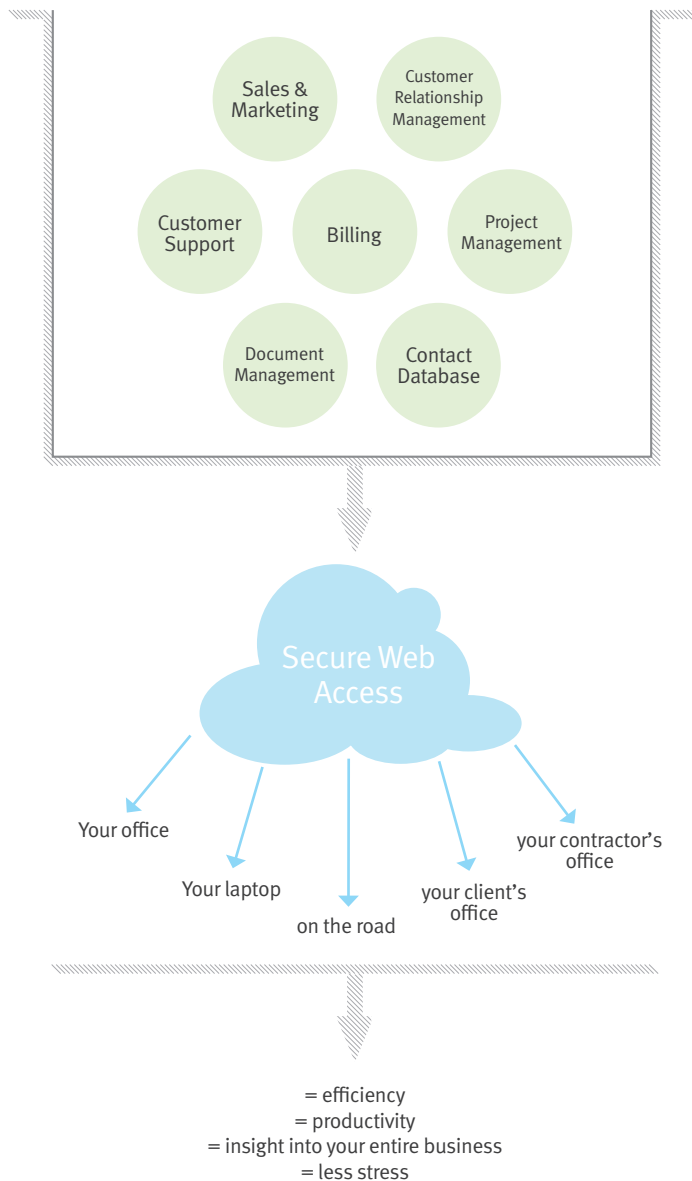
WORKetc makes your job easier by automating many day-to-day tasks and providing real-time insight into how your business is tracking.

Work from Anywhere

WORKetc lets you work from anywhere you want. On the road or at home after putting the kids to bed, your business is now wherever you need to be.

Putting it all together

Everything you do in your business is related. From signing up a new customer, to finishing a project, shipping a product and sending out an invoice. So why should your project management systems be separate from your CRM and billing? It doesn't make sense. It just creates more work, more overheads and more chance for mistakes to creep in.



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A typical workflow with WORKetc

Below is a typical example of how one company might use WORKetc to manage a customer from sales lead through to project, invoicing and support. Use all of it, some of it or create your own system with WORKetc.



Looks complicated doesn't it? The reality is that you are probably already doing all these steps in your business. WORKetc takes the effort out of managing process like this, automating and centralising to help your business become more efficient.

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Who Uses WORKetc?

Some of our long term customers include:

- + Fortune 500 Mining company with 36 seats across 5 locations
- + Search engine marketing in Ontario, Canada with 29 seats
- + Freelance graphic designer in Austin, USA with 1 seat
- + Promotional product company with 12 seats across 2 continents
- + Boutique law firm with 3 seats and no office
- + Software development business in Mexico city with 14 seats
- + Health supplements distributor with 8 seats across the United Kingdom
- + Plus another **329 businesses** across all industry sectors (19th Jan, 2011)

Every Small Business

- advertising agencies
- design firms
- public relations

IT Professionals

- advertising agencies
- design firms
- public relations

Marketing Services

- advertising agencies
- design firms
- public relations

Consultants/Advisors

- advertising agencies
- design firms
- public relations

Boutique Legal Firms

- advertising agencies
- design firms
- public relations

Business Services

- advertising agencies
- design firms
- public relations

Sales Professionals

- advertising agencies
- design firms
- public relations



Feature Overview



Project Management

Automatically create new projects; alert participants, invite customers to collaborate, set milestones and deadlines;organise billing by time, materials or milestones; share documents; and track progress on a visual gantt timeline.

- ✓ milestone, time and materials and internal billing options
- ✓ unlimited sub-projects
- ✓ create dependency between projects
- ✓ automatically alert employees to new projects
- ✓ set deadlines and monitor progress
- ✓ invite customers to collaborate
- ✓ attach documents, timesheets, expenses, events and any other object
- ✓ manage project from a Gantt chart or workflow view
- ✓ view project information by timeline, resources, progress and budget
- ✓ generate real time reports



Centralize Contacts

Import contacts from Vcard, Outlook, Gmail, then store a detailed history for each contact, set up unlimited calendars, create meetings and events with automatic reminders, and allow shared access across your business.

- ✓ work, home, billing and unlimited offices
- ✓ attach people to multiple companies
- ✓ unlimited custom contact fields
- ✓ instant google maps look up
- ✓ review all contact history
- ✓ review all project and billing history
- ✓ attach tags to contacts to enable groups and mail lists
- ✓ view contacts in organisation hierarchy
- ✓ import contacts from Outlook, Gmail and more
- ✓ merge, edit, delete contacts
- ✓ add private comments against contacts



Customer Relationship Management

Having a separate CRM solution no longer makes any sense. Your customers cannot be separated from your business. WORKetc provides a whole-of-business CRM by integrating CRM with projects, billing and more.

- ✓ view your entire contact history with a customer including projects, purchases, billing and support issues.
- ✓ instantly turn an existing contact into a new sales opportunity
- ✓ create groups of contacts for targetted marketing using simple tagging
- ✓ generate real-time reports to identify profitable or costly customers
- ✓ replace this line later on
- ✓ replace this line later on



Bill all you can. Get paid faster.

Integrate data from your project milestones, CRM, timesheets, product lists and expenses to make sure that every dollar entered into WORKetc finds its way onto an appropriate invoice

- ✓ create detailed invoices directly from timesheet data
- ✓ instantly bill project milestones and expenses
- ✓ set up recurring/subsription billing items
- ✓ manage multiple currencies and tax rates
- ✓ apply discounting rules and shipping
- ✓ send PDF invoices instantly via email
- ✓ track payments and view predicted cashflow
- ✓ automatically create overdue notices



Help customers, help themselves.

Create libraries of common enquiries and responses, give customers access to the knowledge base, attach support requests to active projects, and generate detailed reports to track your customer support activities.

- ✓ online timesheets with simple or detailed entry
- ✓ desktop entry widget for Mac and PC
- ✓ create timesheets via email
- ✓ bulk timesheet entry options to create group entries
- ✓ assign a client, activity or project to an entry



More Features...



Document Management

Make files and documents available to your clients, attach documents to projects, and create folders or sub folders to help make your files easy to find.



Email Drop Box

Interact with your WORKetc account without even leaving your inbox. Create sales leads, update projects, set a calendar event and assign new tasks.



Shared Calendars

Think about how you accomplish all of the above in your business today. With WORKetc all tools and components are integrated through the single interface.



Pursue every sales leads

Sales leads are all centrally stored, so employees can collaborate to close sales, set sales actions, view sales history while team leaders can monitor the sales pipeline and run real time reports.



Email Marketing

Use tags on your Contacts files to organise email lists, or use the built-in web forms and generate email lists automatically, then send personalised mass email newsletters – all without leaving WORKetc.



Manage your Product

Create a product catalog, attach to quotes and invoices and include in projects. Set recurring products like subscriptions.



Daily Dashboard

Think about how you accomplish all of the above in your business today. With WORKetc all tools and components are integrated through the single interface.



Makes Friends Easily

Think about how you accomplish all of the above in your business today. With WORKetc all tools and components are integrated through the single interface.



Settings & Localizatoin

WORKetc includes thousands of customised settings and hundreds of detailed reporting options. Plus you control who gets to see what. You can even give your customers access to project reports and online invoices.



Customer Access Portal

Think about how you accomplish all of the above in your business today. With WORKetc all tools and components are integrated through the single interface.



Real Time Reporting

WORKetc includes thousands of customised settings and hundreds of detailed reporting options. Plus you control who gets to see what. You can even give your customers access to project reports and online invoices.



Integration Options

Think about how you accomplish all of the above in your business today. With WORKetc all tools and components are integrated through the single interface.



Screenshots

The screenshot shows the 'Projects' dashboard. At the top, there is a navigation menu with 'Dashboard', 'Contacts', 'Calendar', 'Documents', 'Work', 'Sales', 'Finances', 'Reports', and 'Settings'. Below this is a 'Tools' section with an RSS icon (1) and a search bar for 'Search Fragile World Pty' with a 'Search' button. The main area is titled 'Projects' and has a 'View' dropdown set to 'All Active Projects' and a 'View by Client' dropdown (2). A search bar for 'Search projects' is also present. The main content is a table with columns: Project Name, Client, From, Progress (3), Start Date, and Due. The table lists several projects, including 'Website Development' (Acme Ltd, 37% progress), 'New Project' (Acme Ltd, 0% OVER DUE), 'Research Collection' (Acme Ltd, 21% OVER DUE), 'Construct Contents for' (Acme Ltd, 27% OVER DUE), 'Send contracts for' (Acme Ltd, 35% OVER DUE), 'Revise Specifications' (Acme Ltd, 31%), 'meeting' (Acme Ltd, 41%), 'meeting' (Acme Ltd, 63% OVER DUE), 'Test run' (Acme Ltd, 73% OVER DUE), 'Profit Report II' (Acme Ltd, 39% inherited), 'Profit Report' (Tves R Us Pty Ltd, 55% inherited), and 'Stress Test Formulas' (Tves R Us Pty Ltd, 41%). A tree view icon (5) is on the left of the table. A 'Progress' column header has a dropdown arrow (4). A mouse cursor is over the 'meeting' row's progress bar (6). A 'Tools' icon (7) is at the bottom right of the table.

Projects Dashboard

1. Subscribe to an RSS feed of your project
2. View projects by client or by project status
3. Sort any project column
4. Highlight project by priority
5. Expand and collapse project trees
6. Click to update project progress
7. Set project to inherit progress status from weighted child (sub) projects

The screenshot shows the 'Project Tasks' interface. At the top, there is a 'Zoom' dropdown set to '100%' (1) and a 'Show Period' dropdown set to '21-Mar-2009' to '1-Feb-2010'. The main area is a Gantt chart showing tasks: 'Market Research', 'Small Print Run', 'Marketing', 'Redesign', and 'Graphic Design Work'. The 'Graphic Design Work' task has three sub-tasks, each with a 'Drag & select days' button (3). A 'Progress' section at the bottom shows a 'Progress Issues' entry with a comment 'This entry and related comments are visible by the Client.' and a user profile for 'myself' with a timestamp 'Today @ 8:50 PM'. A dropdown menu is open over the 'Progress Issues' entry, showing options: 'Add new', 'Comment', 'Document' (4), and 'Reminder'.

Projects Details

1. Zoom in or out on your project
2. Plan project timeline with a Gantt chart
3. Create new sub-projects (tasks) by dragging and dropping on the timeline
4. Add anything to the project including documents, reminders, meetings, expenses and more
5. Discuss the project with your team via threaded discussion
6. View the progress of the project as it unfolds.

The Why of What We're About

Small and medium business is at the heart and soul of every nation. But rarely is it recognised as such and given the support it deserves. More than 50% of employees in the USA work for a small and medium enterprise and fully 99% of all businesses employ fewer than 500 people.

But show me the breaks awarded to business owners? Where are the annual bonuses or the government bailouts?

Running a small business is always hard, grinding work and business owners are rarely recognised as community leaders. Your business may pale to insignificance when compared to a Fortune 500, but collectively businesses like ours are massive.

And running a business is not easy. It is nothing like a day job where you can just walk away at the end of the week, pay cheque in hand or simply turn off when the clock hits 5pm each afternoon. And in some countries, if your business fails then it is your family home on the line (show me a government bailout for this!). Talk about stress.

Your business is your livelihood, your lifestyle and in many cases a big part of who you are. If you are not careful it can become all encompassing, engrossing.

But – it is also incredibly rewarding. Freedom. Wealth. Passion. And if you're lucky the opportunity to create lasting change.

And this is what we're about.

We want to help take some of the stress out of running a business. We want our customers to sit back at the end of the day and think "today was just a little bit easier than yesterday because of WORKetc"

It is that simple. This is why we're putting in our 12 hour days, building 24/7 support, why we actually listen to our customers and why every day we make WORKetc just that little bit better.

Start your free 14 day trial.

- ✓ No credit card required.
- ✓ Free for 14 Days
- ✓ All tools included
- ✓ Unlimited users

[Sign-Up Now!](#)

Daniel Barnett
Founder WORKetc



Business Partner



Microsoft | Partner Program

