Contact Your Client Competitive Matrix

Category	CRMBUS		Salesforce				SugarCRM			ACT!			Microsoft Dynamics				GoldMine			Zoho				
	Pro	Ultimate	SalesIQ	Professional	Enterprise	Unlimited	Professional	Enterprise	Ultimate	Cloud	Premium	Pro	Pro w/365	Pro	Sales	OnPremise	Stand Alone	Premium	Cloud	Free	Standard	Pro	Enterprise	CRM Plus

Orientation
- Hosted (SaaS)
- Offline Desktop Access / Data Synchronization
- Included in Cost
- On-Premise

Customization
- Customization
- Included (No Add-On Required)
- Customization Add-on Included in Total Cost
- Complete Company-wide Customization Included
- Custom Roles per User/Group

Security
- Data Access Control
- Field Access Control
- Agent Job Scheduler (tasks specific to agents)
- Recurrent Tasks
- One-Field Search System
- Full Query-by-Example Search

Groups
- Unlimited Groups
- One-Click Groups
- Memorized Groups
- Personal Calendar Manager
- Virtual Desktop Manager
- One Click De-duplication
- Compare and Merge Contact Data Field by Field
- Unlimited User Defined Fields
- Unlimited Linked Documents
- Unlimited Saved Documents
- Encryption of Fields
- Snippets to facilitate data entry
- Unlimited Mapping Fields Settings
- Company Calendars (10 multi-use calendar)
- Word Processor (Mergeable Template Manager)
- Interaction with E-Sign Programs
- Knowledge Database
- Password & License Manager
- Password Generator
- Data encryption
- Integrated Backup System
- Import Lists from different formats
- Five mapping setting for recurrent use
- Assignment of leads to different agents
- Automatic assignment of leads from Internet forms
- Multi-Use Action Buttons
- Unlimited assigned different privileges & passwords
- Several contact list views
- Integrated On-Track Manager System
- Private Eye System
- Agent Time Manager with hourly calculation
- Consulting Time Manager with hourly calculation
- F.A.Q. & Trouble Ticket System
- Image Manager
- List Manager
- Goals Manager
- Procedure Manager
- Subscription Manager
- Agent Metrics System
- Integrated Instant Messenger
- Postcard Creator
- Parsing System
- Automatically Triggered Actions by email rules

Salesforce Automation
- *Management*
  - Account Management
  - Contact Management
  - Opportunity Management
  - Document Management
- *Lead Management*
  - Lead Routing
  - Lead Scoring/Analysis
- *Reporting*
  - Dashboards
  - Sales Forecasting
  - Group Activity Report
  - Standard Reports
  - Custom Reports
  - Prebuild Reports
  - Calculated Fields
- *Sales and Business*
  - Opportunity Analyzer
  - Unlimited Contacts Analysis
  - Unlimited Agents Analysis
- *Task Manager*
  - Unlimited Task Groups
  - Time Zone Indicator
  - Task Lists, Task Calendars and inter-Contact Tasks
  - Unlimited Tasks per Contact
  - Task Assistant

Activity Management
- Activity Management
- Activity History
- Pending Activities
- Contact Activity History
- Notes Tab

Workflow
- Workflow Management
- Automatic assignment of all functions
- Workflow Rules
- Workflow Tasks
- Assignment Rules
- Approval Process
- Workflow Field Updates
- Workflow Convert
- Time-Based Actions
- Customizable Workflow Email Templates

Data Management
- Data Validation
- Product Catalog
- Product Catalog Add-On Included in Cost
- Sales Analytics
- Sales Pipeline Management
- Data Deduplication
- Data Deduplication Add-On Included in Cost
- Lead Archiving
- Easy Unarchive
- Full data mining and reporting available
- Granular Search/Filter on all Fields and Features
- Saved Searches
- Data Import
- Data Import Included
- Complete Import Mapping Settings
- Update Fields in Multiple Records Simultaneously
- Merge Upon Import
- Data Export
- Data Export Feature Included in Product
- Data Export Add-On Included in Total Cost
- Data Export To Excel
- Data Migration

Productivity
- Group Calendaring
- Group Calendaring Add-On Included in Cost
- Calendar
- Tasks
- Reminders
- Computer Telephony Integration (CTI)
- CTI Add-On Included in Cost
- Included (No Add-On Required)
- Team Selling
- Schedule follow-up activities
- Call Scripts and Response Forms
- Included in Cost
- Custom Forms from Call Script Responses

Campaign Manager
- Basic Campaign Management and Analysis
- Included in Cost
- Non-Email Campaign Management
- Event Management

Marketing Automation
- Marketing Automation
- Drip Marketing/Lead Nurturing
- *Email Marketing*
  - Integrated E-mail System (Internal)
  - Email Client Integration or Built-in Capability
  - Email Templates
  - Email Tracking
  - View All Email Interactions
  - View Email History from Contact Records
  - Mass Email Support
  - Automated Emails
  - Mail Merge Email/Mail
  - Mail Merge Email/Mail: Add-On Req'd, Cost Included
  - Email Opt Out
  - Direct Contact Links to Social Media
  - Articles, Blog Manager
  - Social Media & Form Submitter
  - YouTube Video Manager
  - Pinterest Image Manager
  - Twitter Scheduler System
- *Marketing Other*
  - Integrated Auto-Responder
  - Unlimited Auto-Messengers
  - Automatic conversion RTF to HTML
  - Easy Duplication of Messages
  - Merged Template based Messages
  - Start on specific date for selected contacts
  - Shortcuts for one-click assignment
  - Unlimited Messages per Auto-Messenger
  - Trigger Auto-Messenger on Contact Status
  - Trigger Auto-Messenger on Workflow
  - Easy reordering of messages (insert, reorder, etc.)
  - Upload of Client Portals
  - Keyword Analyzer
  - Marketing Idea Manager
  - Marketing Task Manager
  - Multi-Media Campaign Analyzer
  - Integrated Survey System
  - Tracking of Marketing Campaigns
  - Website Prospecting Analyzer
  - QR Code Creator
- *E-Commerce*
  - Domain Manager
  - One-Click Webstore Creator
  - Website Uploader & Webpage Manager
  - Website Manager
- *Communications*
  - Instant E-mails
  - E-Mail Encryption
  - E-mail Protection
  - Unlimited e-mail accounts
  - Rule Manager
  - Parsing e-mail data into contacts from web forms
  - One Click Shortcut Searches
  - Interacts with Outlook
  - UltraFast Searches
  - E-mail Assistant
  - E-mail Contact Tab
  - Read Confirmation System

Telemarketing System
- Telemarketing Groups
- Chart and Stats
- Telemarketing Script Manager
- Instant Messenger
- Send & receive messages inside or outside the network
- Virtual Contacts - to the web
- Dialing
  - Modem
  - Skype
  - SIP (softphone)
  - Google Voice
- SMS Mobile Messages
- Send & Receive System
- Send / Receive Documents

Customer Service Management
- *Customer Support*
  - Customer Self-Service (Web Access via Portal)
  - Customer Web Access Add-On Req'd
  - Customer Surveys
  - Knowledge Base
  - Knowledge Base Included in Total Cost
- *Cases*
  - Case Management
  - Case Escalation

Financial
- *Integrated Invoice System*
  - Charge Credit Card from Invoices
  - Charge ACH Checks from Invoices
  - Calculation of Commissions for Affiliates
  - Commission Override at Invoice level
  - Service and Product Invoices
  - Save at search shortcuts
  - Invoice Group System
  - Ability to create unlimited invoices
  - Interaction with Media Campaign Analyzer
  - Recurrent Invoices
  - E-mail, Print and Fax Invoices
  - Use of Snippets to create Service Invoices
  - Automatic total calculations in Service Invoices
  - Recording of Partial Payments
  - Private Notes
  - Recording of Invoice Payments in Bank Register
  - Export to Excel
- *Products and Services*
  - Several Image per Product
  - Catalog Creation and Printing
  - Web Store Creator with integrate PayPal
- *Account Receivables*
  - Payment Plans Manager
  - Charge directly Credit Cards
  - Charge directly with ACH checks
  - Charge with Check Drafts (printed checks)
  - Recording of payments in Bank Register
  - Trigger Auto-Managers on failed payment
  - Invoice creation from Receivables
  - Recurrent Receivable
  - Automatic Triggering of Commissions
  - Manage up to five credit cards per contact
- *Account Payables*
  - Creation of Payables for Clients and Affiliates
  - E-mail, Fax, Print Commission (Payable) Reports
  - Recurrent Payables
  - Consolidate same-contact payments
- *Bank and Checks*
  - Print Check Drafts
  - Print Unlimited checks
  - Integrated Reconciliation System
  - Interaction with Receivable/Payables
  - Print Envelopes and Endorsements
  - Unlimited Unlisted Commission System
  - Percentage or dollar amount
  - Create Payables by Printed Checks or PayPal
  - Financial Desktop
  - Forecasting of Receivables, Payables and Invoices
  - Products Sold by Date Range
  - Bank Balance by Date Range
  - Debt Reduction Analyzer
  - Optimize Monthly Budget for all debts
  - Saves payment time and money
  - Budget Manager
  - Scenario Budgeting
  - Amortization Loan Center
  - Manage unlimited loan scenarios
  - Quote Generation/Management
  - Quote Generation/Management Included

Partner Relationship Mgmt (PRM)
- PRM Included
- PRM Add-On Included in Total Cost
- Partner Self-Service (Web Access) Included in Product

Affiliate Management
- Upload of Affiliate Portals
- Affiliate Lead Finder
- Advertising Place Manager
- Affiliate Media Marketplace
- Unlimited Commission Affiliate System
- Affiliate Web Portal