

# Feature Checklist

<b>Customer Relationship Management (CRM)</b>		<b>Project Management (PM)</b>		<b>Pricing and Invoicing</b>	
Lead Capturing	✓	One Click Opportunity to Project Conversion	✓	Products and Services Catalog	✓
Leads Import	✓	Automation	✓	Customer Pricing	✓
Web-To-Lead & Web-To-Opportunity Forms	✓	Project Templates & Stage Templates	✓	Invoicing	✓
Lead Capture from Email	✓	Autoscheduling	✓	Invoice Templates	✓
From Social Networks (Twitter, LinkedIn, Facebook)	✓	Configurable Workflow Rules	✓	Automatic Invoicing	✓
Lead Distribution	✓	Invoicing Management	✓	Invoice Reminders	✓
Leads Sharing	✓	Stage and Tasks Dependencies	✓	Recurring Invoices	✓
Configurable Rules	✓	Visual Time Line	✓	Pre-Paid Items	✓
Lead Qualification	✓	Visual WorkBench for Projects	✓	Payment Requests	✓
Configurable Categories	✓	Workspace Collaboration Bridge	✓	Online Payments	✓
Rules Based Profiling	✓	Resources Management	✓	Multiple Sales Quotes	✓
Lead Nurturing	✓	Project Amendments Management	✓	Time Tracking with Approval Management	✓
Contact Recording and Planned Follow-up	✓	Personal To-Do List	✓	Multiple Task "Stopwatch" Timers	✓
Email Marketing	✓	Internal and External Project Roles	✓	Automated Timesheet Posting to Invoice	✓
Sales Pipeline Management	✓	Online Client Sign-off	✓	Expenses Tracking with Approval Management	✓
Opportunity Tracking	✓	Event Scheduling	✓	Top-down Snapshot Views	✓
Pipeline Dashboard	✓	Tracking and Reporting Billable / Non-Billable Time	✓	Work with Multiple Currencies	✓
One Click Lead to Customer Conversion	✓	Estimates and Budgets	✓	Flexible Taxation Setup	✓
Customer Profiling	✓	Budget vs. Actuals Tracking	✓	Define Allowable Countries	✓
Contact Roles Identification	✓	<b>Collaboration</b>		<b>Customization</b>	
Opportunity Tracking	✓	Sharing		UI Customization	
Opportunity Nurturing	✓	Calendars		Themes	
Contact History	✓	Timesheets		Customizable internal login screen	
Email Marketing	✓	Document Library		Favicon	
Managed Access to Customer Data	✓	Notes		Style Sheet (CSS) Override	
Permission Based Access	✓	Leads/Contacts/Cases/Opportunities/Projects		Flexible Preference Setup	
<b>Social CRM (SCRM)</b>		Task and Accountability Management		Company	
Monitor Multiple Facebook and Twitter Feeds		Update Streams		User	
Save Messages		Support Knowledge Base		Extra Fields throughout all Details Pages	
Create Lead or Customer from Message		Alerts and Reminders		Extra Data Objects (Custom Tables)	
Create Case from Message		Drop-box for Email, Tasks, and To-Dos		Canned Responses	
Create Task to follow up Message		What's New List		Templates	
Post under Multiple IDs		Event Resources Management		Projects	
Metrics		Email Integration		Stages	
Keyword Metrics		<b>Email Marketing</b>		Email	
Sentiment Metrics		Static and Dynamic Email Lists		Invoicing	
Channel Searches		Opt Out Tracking		Notifications	
Sales Opportunity Channel		Configurable Email Templates		<b>Integrations</b>	
Buzz Channel		Campaigns		Google Apps for Business	
Client Support Channel		Immediate Send/Scheduled/Triggered		Gmail	
General Search Channel		Email Click-through and Tracking Analytics		Calendar	
<b>Customer Support Management</b>		Automatic CSS Inlining		Drive	
Customer Cases / Issues		Rich Content / Text Only Email Versions		Sharefile	
Support Knowledge Base		Campaign Analytic Reports		Accounting	
Email-based Support Tickets Automation		<b>External User Portal</b>		Quickbooks	
Cases / Tickets Dashboard		Customer and Supplier Access		Xero	
<b>Mobile Website Access for:</b>		Project Collaboration		Freshbooks	
iPhone & iPad		Signoffs and Approvals		Payment Processors	
Android		Invoices and Payments		Authorize.Net	
Windows Mobile		Customer Support Cases		Chase Paymentech	
<b>System Support and Documentation</b>		<b>Reports and Dashboards</b>		Moneris Solutions	
Context Sensitive Help		Analytic Dashboards		PayPal (Standard and Pro)	
Help Videos		Standard Reports		FirstData	
User Guide		Custom Report Builder		Other Integrations	
<b>Web Development Platform</b>		Export Reports to Excel / CSV		Box.com (Online File Sharing)	
Build & Manage Standard Websites		Export Reports to Presentation-Ready PDF		Outlook/Exchange Server (Calendar)	
Build & Manage eCommerce Websites				HubSpot (Digital Marketing)	
				Application Programming Interface (API)	