UGRU Competitive Matrix

	UGRU	Act!	Sales Force					Zoho					Infusionsoft					Wealthbox	Redtail	eMoney			MoneyGuidePro	QuickBooks
	Advisors	Premium Cloud	Group	Professional	Enterprise	Unlimited	Performance	Free	Standard	Professional	Enterprise	CRM Plus	Essentials	Deluxe (Sales)	Deluxe (E-Commerce)	Complete	Team			emX Select	emX	emX Pro	MoneygGuidePro	Pro
Security																								
Encryption Strength - A+	Yes	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Security Headers A or B	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Secure Offsite Data Storage	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Backup and Disater Recovery	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Redundant Locations	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Support																								
1 on 1 Training	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	Yes	Yes
Business Hours support	Yes	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes
Customization	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	Yes	Yes
eDocument Migration	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO
eMail Set up	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
File Migration	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Free Demo	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Live Chat support	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	Yes	Yes
On Demand Training Video	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Service Level Agreement (SLA)	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO
Training Video Library	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	NO	Yes
Training Webinar	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Zapier App Integrations	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Internet Access																								
Client Portal	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes
Documents	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	Yes
Mobile	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Android	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Apple iOS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Browser	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Chrome	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Safari	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Firefox	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Permissions	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Roles	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Territory	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	Yes
Documents	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Compliance																								
HIPAA	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	Yes
FINRA	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	Yes
CRM																								
Territory Management	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Interaction Tracking	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Task Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Email Segregation	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Call Segregation	Yes	Yes	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Task Segregation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Past Due Segregation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Today/Tomorrow/Week Segregation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Lead Only	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	Yes	NO	NO	NO	NO	NO
By Importance	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Assign Task to Calendar	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Task Search	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Users Can Play Multiple Roles	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Data Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Validation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Duplication Recognition	Yes	Yes	NO	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Archiving	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Import Mapping	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Mass Import	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Mass Export	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	NO	Yes
Granular Search Filter	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Saved Searches	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Contact	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	Yes
Activity	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Opportunity	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Account	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Customizable Data Fields	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Convert Natural File to Entity (One Click)	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Change Primary to Spouse (One Click)	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Contact Tagging System	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Lead Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Lead Source	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Lead Web Capture	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Lead Routing	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Mass Reassignment	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Lead Referral Tracking	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Lead Segmentation	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Sales																								
On Demand Call Scripts	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Team Selling	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Pipeline Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Quote Generator	Yes	NO	NO	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Proposal Generator	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Joint Lead Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Marketing																								
Email	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes
Built-in email Included	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	NO	Yes
Integrated with Outlook	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Mass email Included	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	NO	NO	NO	NO	NO
MASS Emails per Batch (over 20k per day)	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	NO	NO	NO	NO	NO
View emails through CRM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Keep Existing email	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Email Saved for Audits	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Red Flag word search	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Email and Mail merge wizards	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	Yes	NO	NO	NO	NO	NO
Automation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Design Editor	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Drip	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Reporting																								
Key Performance Indicators (KPI's)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Dashboards	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Real Time	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	Yes	Yes	Yes	NO	Yes
Sales Forecasting	Yes	NO	Yes	Yes	Yes	Yes	Yes	NO	Yes	Yes	Yes	Yes	NO	Yes	NO	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Pipeline	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
User Activity	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Standard Reports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Custom Reports	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Email Analytics	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Crystal Reports	Yes	NO	NO	NO	NO	NO	No	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	NO	NO	NO	NO	NO	NO
Email Reports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	Yes	NO	NO	NO	NO	NO
Report Export	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Campaign ROI Reporting	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Business Management																								
Bookkeeping	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Unlimited Bank Accounts	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Reports to Dashboard	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Record/Process Accounting Transactions	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Accounts Payable/Receivable	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
General Ledger, P&L and Balance Sheet	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Invoicing	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Purchase Order	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Query, reconcile, drilldown, journal, timesheet	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Permissions Based	Yes	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
Workflow Management	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Linear workflows	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
"If, Then" Logic Workflows	Yes	NO	NO	NO	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Trigger Automation	Yes	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
"Jump to" Tasks	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Workflow Task Synced to Calendar	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Pre-Built Workflows	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Operation Templates	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Staff Acquisition	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Staff Maintenance	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Staff Termination	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Client Acquisition	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Client Maintenance	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Client Termination	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Vendor/Partner Acquistion	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Vendor/Partner Maintenance	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Vendor/Partner Termination	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO
Document Management	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	Yes
Total Storage Greater than 5 GB/user	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes
File Size up to 50 MB	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Permissions Based	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	Yes
Drag/Drop	Yes	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
Thumbnail View	Yes	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Search	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	Yes	NO	NO	NO	NO	NO
W.O.R.M. (Write Once Read Many)	Yes	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
File Collaboration	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	Yes
Audio Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
Video Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
Image Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
Doc Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO
PDF Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO
Excel Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO
PPT Formats	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO
Operations Library	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
Tagging Codes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Tagging Code List	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Tagging Code Search	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Tagging Code Manager	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Email Manager	Yes	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	NO	NO
Document Manager	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	Yes	Yes	NO	NO	NO	NO	NO
Scripts Manager	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Collateral - Templates	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Human Resources	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Employee Handbook Template	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Staff Acquisition email/doc templates	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Staff Maintenance email/doc templates	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Staff Termination email/doc templates	Yes	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Calendar	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
Group Calendar	Yes	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO
calendar invite via email	Yes	NO	NO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NO	NO	NO	NO	NO	Yes