



## Detailed Feature Comparison List

### Core CRM Module Features

●=Yes ●=No

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Key Features	Community	Professional
Contact Or Entity Centered Views	●	●
360 Degree View Of Customer Transactions & Activities	●	●
<b>Leads &amp; Prospect Management</b>		
Track & Manage Leads	●	●
Track & Manage Prospects	●	●
Convert Leads To Prospects Or Customers & Opportunities	●	●
<b>Calendar &amp; Activity Management</b>		
Calendar Views For Meetings, To-Dos, Calls, Call Backs	●	●
Daily, Weekly, Monthly & Yearly View Of Calendar	●	●
Private / Team Activities	●	●
Schedule A Meeting With Teams & Reserve Resources	●	●
<b>Case Management</b>		
Case Management & Escalation	●	●
Allow Customers To Create Cases Online	●	●
Case Dashboard	●	●
<b>Opportunity Management</b>		
Opportunity Management & User Defined Stages	●	●
Link Opportunities To Quotes, Sales Orders & Invoices	●	●
Opportunity Values Based On Quoted Revenue Or Margin	●	●
Opportunity Dashboard With Revenue Forecasting	●	●
Competitor Tracking	●	●
Activities, Notes & Email By Opportunity	●	●
<b>Quote Management</b>		
Quotes Can Use Inventory & Text Items	●	●
Quotes Use Customer Special Pricing	●	●
Quotes Convert To Orders	●	●
Copy Quotes To New Customers	●	●
Allow Users To Initiate Quotes Online	●	●
<b>Target List</b>		
Target Lists Link To Customers, Prospects Or Leads	●	●
Target Lists Can Be Filtered By Any Field (Including Custom Fields)	●	●
Target Lists Based On Sales History	●	●
Email, Call List, Mail Merge Feature From Target Lists	●	●
Target Lists Can Be Exported To Any Email Marketing Solution	●	●
<b>Marketing Campaigns &amp; Wave Management</b>		
Marketing Campaigns & Management	●	●
Marketing Campaign Waves For Email, Fax, Call List, Mail Merge	●	●
Outbound Call Management & User Interface	●	●

**Core Customer Module Features**

●=Yes ●=No

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Customer Records		
360-Degree View Of Customer	●	●
Unlimited Ship-To's	●	●
Payment Terms, Shipping Method, Taxation, Sales Rep By Ship-To	●	●
Save Credit Card Numbers	●	●
Loyalty Points	●	●
Third Party Shipping By Ship-To	●	●
Address Verification (Requires UPS, FedEx or USPS Account)	●	●
Unlimited Contacts Split By Type	●	●
Customer Contact Centered View	●	●
Separate eCommerce Access / Logins Per Contact	●	●
eCommerce Product Filters Per Contact	●	●
Full Notes, Email, Activity, Opportunity & Document History Per Contact	●	●
Campaign Wave Tracking	●	●
Custom Pricing, Multi-Level Breaks & Promotional Pricing	●	●
Easily View Transaction History With Attachment Drill Down	●	●
Account Receivable Dispute Features	●	●
Easily View Outstanding Quotes & RMA's	●	●
Easily View Recent Sales - Cross Sell Up Sell Opportunities (Like Amazon's People Who Bought This Also Bought That	●	●
Sales Order Processing		
Customer Sales Order Processing	●	●
Pick Multiple Items In An Order At Once	●	●
Sell Stock, Non-Stock & Labor Items	●	●
Special Selling Interface For Matrix Items (I.E Sizes, Colors)	●	●
Special Selling Interface For Kit Items	●	●
Special Selling Interface For Bundled Items	●	●
Support For Serial & Lot Numbers	●	●
Accrue Or Redeem Loyalty Points Per Order	●	●
Sell Or Redeem Gift Cards / Certificates Per Order	●	●
Pick Multiple Items In An Order At Once	●	●
Allocation & Reservation Of Items	●	●
Order Entry Cross Sell Up Sell (Prompts The User Entering The Order & Allows Them To Easily Add Qty To The Order On The Fly)	●	●
Order Entry Accessories & Substitute (Prompts The User Entering The Order & Allows Them To Easily Add Qty To The Order On The Fly)	●	●
Shipping Dates, Warehouse Per Line Item	●	●
Profit Calculation By Item Line & Overall Order	●	●
Drop Ship Option By Item Line (Defaults From Item Set-Up)	●	●
Allow Back Order Option Per Order (Defaults From Customer Set-Up)	●	●
Allow Multiple Payments To Be Made Against An Order	●	●
Process Credit Cards With The Sales Orders	●	●
Audit Trail To See Who Has Done What Per Order	●	●
Stock Qty Information With Drill Down On Order Entry. E.G. If There Is A Qty On Purchase Order By Drilling Down On The Qty The User Can See Which Orders, Due Dates & Qty Are Coming In.	●	●
Allocation On Order Entry To Promise A Customer Stock	●	●
Optional Workflow Options (i.e. credit approval)	●	●
Printing Orders / Picking Tickets in Batches or individually	●	●

Consolidated Picking Notes Feature to pick in Waves	●	●
Print Picking Tickets By Fill Rate	●	●
Options To Change Locations & Serial Numbers/Batches On Order Entry	●	●
Complex Sales Taxation By Item	●	●
<b>Credit Control</b>		
Credit Control management with send copy invoice feature, enter notes & payment promised dates	●	●
Overall Credit Control Management with Debt Analysis	●	●
Predicted Cash Flow (based on average number of days it takes individual customers to pay applied to their outst&ing debts).	●	●
Statement & Debtor Letter Production with Lowest cost routing of documents	●	●
Interest Invoice Creation Routine on Statement run	●	●
<b>Agent / Sales Rep Management</b>		
Sales Rep/Agent Management	●	●
Sales Rep/Agent Commission Calculation Routine	●	●
Sales Rep/Agent Linked Customers/Transactions/Orders	●	●
Option for Custom Form Templates for Each Customer	●	●
<b>Customer Pricing</b>		
Pricing Methods Are Numerous & Simple To Implement Like As Defaults Combined With Mark-Up % On Last Cost Or A Pricing Cost, Product Group Discount B&s, Last Price They Paid, Or Special Price Lists With Qty Breaks & Promotional Pricing & Specific Customer Pricing On Specific Items.	●	●
Retail Or Wholesale Pricing	●	●
Customer Based Pricing Options; Markup On Last Cost, Last Price Paid, Price Lists (With Quantity Discounts), Negotiated Pricing (With Start & End Dates)	●	●
Customer Discount Options; Overall Percentage Discount, Discount Percentage By Item Category	●	●
Promotional (Sale) Pricing	●	●
Coupon (% Discount, Flat Discount, Free Shipping, Limited Use Coupons, Etc)	●	●
All Pricing, Discounts, Coupons Work Across All Sales Channels	●	●
Copy & Import Price List Options	●	●
Multi-Currency Price Lists	●	●
<b>Returns</b>		
Return Management RMA	●	●
Return Options like Accept (Replace or Credit) & Decline (Scrap or Return)	●	●
Apply Return Credit To Account Or Refund	●	●
Customers Can Initiate Returns Online	●	●

**Core Supplier Module Features**

●=Yes ●=No

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Supplier Records		
360-Degree View Of Supplier	●	●
Unlimited contacts split by type	●	●
Contact centered view	●	●
Full Notes, Email, Activity, Opportunity & Document History Per Contact	●	●
Supplier Warehouse Locations	●	●
Custom Cost Pricing, Multi-Level Breaks & Promotional Pricing	●	●
Transaction history with attachment drill down	●	●
Transaction dispute feature	●	●
Easily View Outstanding Orders / RMAs	●	●
Easily View Recent Purchases	●	●
Easily View Debt Analysis	●	●
Easily View Relationships to other Entities	●	●
Purchase Order Processing		
Purchase Requisition & Conversion To Purchase Order	●	●
Purchase Requisitions Can Be Exported / Import From Excel	●	●
Manual & Automatic Supplier Purchase Order Processing	●	●
Drop Ship & Special-Order Purchase Order Processing	●	●
Different Payment Terms For Each Order For Same Supplier	●	●
Due (Arrival) Dates On Every Item Line Links Displays In Sales Order & Ecommerce Pages (I.E. Buy Today & We Will Ship On The 20 <sup>th</sup> )	●	●
Special Pricing For Supplier With Quantity Breaks	●	●
Manage Goods Received By Warehouse By Supplier	●	●
Match Purchase Invoices To Grn Goods Received	●	●
Consolidate Deliveries To One Supplier Invoice Keeping Relevant Information On Item Lines Like Source Document, Purchase Order Numbers Etc.	●	●
Recurring Purchase Orders When We Have Repeats At Regular Intervals	●	●
Purchase Order Routines		
Drop Ship Purchase Order Routine (from Supplier to Customer)	●	●
Special Order Purchase Order Routine - These Are For Items We Do Not Want To Stock Either Because They Cost A Lot Or Take Up A Lot Of Room & We Can Get Them Quite Quickly So We Just Buy To Order. This Would Be Identified On The Stock Item.	●	●
Auto Generate Purchase Order Routine- This Can Work In Numerous Ways, A Simple Way Is To Order What You Need To Fulfill Your Sales Orders E.G. In Stock - On Sales Order + On Purchase Order Already + In Transit To The Warehouse From Other Warehouses = Potential Stock. If This Is Negative Then We Need To Order To Fulfill Our Sales Orders. Another Option Is Using What We Call Sales Trends Which Adds To The Previous Calculation Average Sales X Lead Time As This Gives Us The Qty Of Stock We Need To Order So We Do Not Run Out Before We Have To Order Again. This Produces A List Of Items To Order & You Can Click On The Hyperlinked Qty To See How It Was Arrived At. Also The Ability To Have Main Supplier Or Last Lowest Cost Supplier As The Recommended Supplier With Relevant Lead-Time.	●	●
Requirements Planning - Use Reorder Points & Custom Routines To Create / Populate Purchases	●	●
Supplier Payments		
Full Account Payable Functionality	●	●
Pay Bills Individually Or In Batches	●	●
Apply Debit Memo's Against Supplier Bills	●	●

**Core Inventory Module Features**

●=Yes ●=No

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Inventory Records		
360-Degree View Of Inventory	●	●
Item Centered View Showing Sales Orders, Purchase Orders, Transaction History, Stock Qty Information, Costing, Etc - By Location (Warehouse Or Store)	●	●
Unlimited Locations (Warehouse Or Store)	●	●
Unlimited Bin Locations (Warehouse Or Store)	●	●
Support For Stock, Non-Stock & Labor Items	●	●
Support For Matrix Items (I.E Sizes, Colors)	●	●
Support For Kit Items	●	●
Support For Assembly / BOM Items	●	●
Support For Bundled Items	●	●
Support For Electronic Download Items	●	●
Support For Gift Card / Certificate Items	●	●
Support For Serial & Lot Numbers	●	●
Support For Inventory Allocation (Allocate in-stock quantities)	●	●
Support For Inventory Reservation (Presell incoming items)	●	●
Support For Supplier Item # / Description	●	●
Support For Customer Item # / Description	●	●
Accessories & Substitutes (shows on order forms and ecommerce)	●	●
Support For Standard, Average, FIFO, LIFO, & Landed Costing Methods	●	●
Option To Store Items In Specific Bin Locations (works with Connected Warehouse)	●	●
Preferred Put Away Location For Each Item	●	●
Preferred Pick Location For Each Item	●	●
Unlimited Units Of Measure (i.e. Each, Dozen, Case)	●	●
Stock Routines		
Stock Take Routine by Location (Warehouse / Store)	●	●
- By Location Zone	●	●
- By Item	●	●
- By Stock Cycle Days	●	●
Stock Adjustments	●	●
Internal Movements	●	●
Inventory Pricing Options		
Support For Pricing By Currency	●	●
Support For Unlimited Price Lists	●	●
Pricing By Unit Of Measure On Price Lists	●	●
Quantity Discounts On Price Lists	●	●
Support For Retail & Wholesale Pricing	●	●
Support For Fixed / % Markup On Pricing / Last Cost	●	●
Support For Profit Margin Pricing	●	●
Promotional (Sale) Pricing	●	●
Coupon (% Discount, Flat Discount, Free Shipping, Limited Use Coupons, Etc)	●	●
All Pricing, Discounts, Coupons Work Across All Sales Channels	●	●
Copy & Import Price List Options	●	●
Multi-Currency Price Lists	●	●

**Core Banking Module Features**

●=Yes ●=No

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Bank Records		
Unlimited Banks	●	●
Unlimited Bank Accounts With Multi Currency	●	●
Bank Account Balance Tied To Financials	●	●
Bank Routines		
Bank Reconciliation With "On The Fly" Transactions	●	●
Easily Transfer Money Between Account	●	●
Separate Deposit / Bank Routine For Those Users That Do Not Immediately Deposit The Money	●	●
Bank Payments / Receipts	●	●
Recurring Bank Payments / Receipts	●	●
Print "On The Fly" Checks	●	●

**Core Accounting Module Features**

●=Yes ●=No

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Account Codes		
Unlimited Account Codes	●	●
Support For Basic Or Segmented Financial Codes	●	●
User Definable Account Code Segments	●	●
Bank Account Balance Tied To Financials	●	●
Accounting Routines		
Journals Taxable or Non-Taxable	●	●
Journal Templates by Percentage or Value	●	●
Prepayments Routine	●	●
Accruals Routine	●	●
Customer & Supplier Contras	●	●
Bad Debt Provision Routine	●	●
Write off bad debt Routine	●	●
Multi-Currency Revaluation Routine - This routine will revalue customers, suppliers and bank accounts.	●	●
Post By Transaction Or By Batch	●	●
Budgets to compare with actuals	●	●
Recurring Journal Routine	●	●
Stock Revaluation Routine - Reconcile costing differences between purchases and bills.	●	●
Month End Routines		
Month End Wizard Prompts the user to take reports and post items.	●	●
Month End Log so can reprint the reports as saved in PDF	●	●
Period Based Accounting with user definable periods.	●	●
Audit Trial Enquiry	●	●
Prior Year Adjustments so you can post into the last closed fiscal year	●	●

**Core System Manager Module Features**

●=Yes ●=No

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Company Setup		
New Company Wizard Steps You Through The Setup	●	●
Includes All U.S. And Canada Postal Codes	●	●
Advanced Sales Tax Rules & Tax Rates For Every U.S. Postal Code	●	●
Customization Tools		
Plug-in Manager To Install Custom Plug-ins	●	●
Business Intelligence Dashboard Designer	●	●
User Role Based Menu & Screen Designer	●	●
Data Dictionary To Modify & Add New Fields	●	●
Search Manager To Add New Search Screens	●	●
Job Service Manager (Set Tasks To Run At Scheduled Times)	●	●
Full System Audit Trail	●	●