

CRM SOFTWARE	ACCPAC <i>AccCRM</i>	Best CPASoftware <i>Visual CRM</i>	Best Software <i>ACT!</i>	Best Software <i>SalesLogix</i>	Cole Valley Software <i>ContactEase</i>	Commercial Logic, Inc. <i>PowerPM CRM</i>	Creative Solutions <i>Practice CRM Features</i>	FrontRange Solution <i>GoldMine Standard Edition</i>	Gardina & Associates <i>Office Tools Pro</i>	Intuit <i>Client Manager</i>	Interface Software <i>InterAction</i>	Knowledge Concepts <i>FirmWorks</i>	Maximizer Enterprise <i>Maximizer</i>	Microsoft <i>CRM Standard Edition</i>	Microsoft <i>MS Outlook Contacts</i>	NetSuite <i>NetCRM</i>	Software Technology, Inc. <i>PracticeMaster</i>
Does a single company record support multiple contacts?	Yes	Yes	Yes (referred to as a group)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No (but they can be linked)	No	Yes	Yes
Does a company record handle different addresses for different contacts? Or do these become new company records?	Yes	Yes	Yes	Yes	Yes	Yes (unlimited)	Yes	Yes	Yes	Yes	Yes	Yes (2 per contact)	Yes	No (but they can be linked)	No	Yes	Yes
Does software support customizable views?	Yes	Yes	Yes	Yes	Yes	Some fields can be relabeled for clarity	No	Yes	No	No	Yes (very powerful)	Yes	Yes	Yes	Yes	Yes	No
Do the contact records contain fields for e-mail, web page & multiple phone numbers?	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Does the software synchronize with MS Outlook's Tasks & Calendar?	Yes (bi-directional)	No	Calendar only	Yes	Uses Outlook's Calendar	No	No	Yes	No	Calendar only	Yes	Calendar only	Yes	Yes (but not with the Web version)	Yes	Yes	No
Does the software synchronize with MS Outlook's e-mail?	Yes	Yes	Yes	Yes	Uses Outlook's Tasks	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Does the software use templates from MS Word to create letters & mailing labels?	Yes	Yes	Yes (and has its own as well)	Yes	Yes	No	No	Yes	No	Yes (one at a time)	Yes	Yes	Yes (and has its own as well)	Yes	Yes	Yes	No
Should I ask about unique features NOT usually considered as standard CRM features?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	No
Do I need to hire a specialist to come and configure the system?	No	No	Depends on what you want to do	For larger installs	For larger installs	No	Yes	For synchronization & custom fields	No	No	No	Included with purchase	For synchronization & custom fields	Yes	No	No	Yes
Will it integrate with the other applications I am using?	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes (InterAction EA bridge integrates to many different packages)	Yes	Yes	Yes	Yes	Yes	No
What does the software integrate with (without any daily import/export effort on my part)?	ACCPAC Suite & MS Office	Visual Practice Suite & MS Office	MS Office, Lotus Notes, Eudora, Adobe Acrobat, WinFax PRO & Palm OS handhelds 3.0 or later	MS Office & add-on programs for many other application needs	MS Office, many of the practice management packages, NAPI compliant software + API set	PowerPM Suite & MS Office	Creative Solutions Suite, UltraTax, Write-Up Solution & MS Office	MS Office	Office Tools Pro suite & Palm Pilot	Intuit applications (Lacerte, ProSeries, QuickBooks) & MS Office	Custom choices b/c of its Bridge Software	Groupware, multiple time & billing packages & MS Internet Explorer	MS Office	MS Office, Great Plains & Solomon	MS Office	NetSuite, Oracle Small Business & MS Office	Tab3 Practice Management
Does the system support import & export?	Yes	No	Yes	Yes	Yes	Yes	Yes - export import from CSI products only	Extensively	Yes	Import	Yes	Yes	Yes	Yes	Yes	Yes	Yes (extensive features)
Is the software a standard feature of other software?	No	Yes	No	No	No	Yes	Yes	No	Yes	No	No	No	No	No	Yes	No	Yes
Can the product run as a stand-alone system?	Yes	No	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	No	Yes	No	No	Yes	No
Does the software require web access? Is it web-based?	Yes (w/online sync capability)	No	Windows & web-based options	No	Windows & web-based options	No	No	No	No	No	Windows & web-based options	Yes (browser-based)	No	No	It can be	Yes	No
Is the pricing model subscription-based pricing?	Both	No	No	No	No	No	No	No	No	No	No	No	No	No	It can be	No	No
How hard is the product to learn? Do I need a lot of training? Level: (B) basic, (I) intermediate, (A) advanced	B	B	B	I	Power user (A) Simple User (B)	I	I	I	B	B	B - I	I (includes training)	I	A	I	I	A
What about synchronization licensing? Is there an additional cost?	Yes (solo product)	No	No	No	No	No	No	Yes	No	No	No	No	Yes	No	No	No	No
Can I create user-defined fields?	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes (unlimited)	Yes	Yes	Yes	Yes	No
What other features does the package have that I may not have thought of?	Workflow, wireless support, choice of database & external data integration	Power Lists & Tasks Lists	Groups, e-mail, custom menus, extensive report generating features & Library Tab (for document storage)	Optional Dynalink, integrates SalesLogix with Best Software & Great Plains products, mobile & offline options, & business alerts and notifications can be set	Expansion of the features in Outlook optional, focused on professional service, update DB from the Web by clients optional & high level of security by client record	Shared Contacts & Conflict of Interest	Tracks the states in which the client is doing business	Knowledgebase, choice of database & can be integrated with your web page	Entity types have different fields, consolidated activity list, mailings by customer categories	Single screen view for everything on client, FAQs on each screen & single data entry b/c of suite integration	Who Knows Whom watch list, relationship map, data quality & change management control, extra security levels	Layers on top of Practice Management Suites	Contact-specific notes under the company record & Order Entry Model	Includes contract, service cases, knowledgebase & a full order entry and quote generation component	Displays all e-mail sent & received for a contact with lookup feature. Has very flexible views & user-definable fields	Very open system; uses XML for good bi-directional sharing of data	Many practices use only this suite without need for other products. Software Technologies uses its own software for its sales teams.
What special requirements or negatives should I be aware of?	Subscription model	Requires CPASoftware, limited CRM functionality	Carefully consider how mailings to multiple contacts are handled, as well as multiple contacts with different information	Some firms don't know they are using it	Total PowerPM Suite Required, CRM sales features limited	Requires total suite. Most of the really robust CRM features to be added to the software are on the development plate.	Easy to lose control of data & definitions of user-defined fields	Access database & SQL database to be released in June 2004	No sales pipeline & no sophisticated marketing tools	Specific feature agenda, potentially expensive	Watch for data corruption with synchronization; interface to Outlook Calendar is awkward	Requires MS Exchange & a server environment	Limited true CRM features; no reporting on date-stamped notes & requires creativity	Subscription model	Requires total suite: Double check marketing tools		
PRICING	\$69/month per user <small>from www.accpac.com</small>		\$206.95 (1 user) \$898.65 (5-user license) \$22W	\$485-\$995 per seat (single-user) \$0-\$9,995 (server)	\$250/seat (power user) \$150/seat (basic user) scalable pricing server not required, even for multi-user access Advanced Client Server option additional cost	\$125/user (minimum 10 users) For client server multi-user version, add \$5,000 base	\$900 site license	\$178 (1 user) \$779.90 (5-user license) \$2W	\$799 (5 consecutive users) no server license needed & no licensing by total number of staff	\$249 (stand-alone) \$949 (5-user license) 20% discount for Intuit Professional Advisors	\$399/user + server licensing	\$600/user scalable pricing available & additional modules priced separately	\$499/user <small>www.crm4ever.com</small>	-\$395/user + MS Server licensing	Included with MS Office @ \$379/user + \$109.99/user (Outlook only) <small>pricing from OfficeMax online</small>	\$800/year for 1 user + \$175/each additional user per month	\$150 (1 user) + \$60/additional user + \$495 (5-user Tals3) (full client server versions are on a higher pricing scale)