

	Lite Plus &	
	Lite	Professional
<b>Lead Management &amp; CRM</b>		
• Web-based lead management and routing	✓	✓
• Lead import through batch upload (.CSV)	✓	✓
• Unlimited export of contacts	✓	✓
• Number of contacts	10,000	Unlimited*
• Custom Fields	10	250
• Customizable Result Codes (Call Dispositions)	10	250
• Real-time management dashboard	✓	✓
• Call history tracked and displayed	✓	✓
• De-duping tool to remove duplicate leads	✓	✓
• Integration with 3rd party CRM and lead management systems through outgoing Web posts (HTTPS/XML)		✓
• Integration with lead providers through incoming Web leads (HTTPS/XML)		✓
• Blast tag leads based on marketing activities (i.e. email, mailing)		✓
• Customizable lead status options to track pipeline		✓
• Update or add contact info with update imports		✓
• Custom tables for many-to-one relationships		✓
<b>Lead Routing</b>		
• Automatic next-best-call lead routing	✓	✓
• Automated lead routing followup periods based on Result Code	✓	✓
• Customizable priority-based lead routing (Last In, First Out, Round Robin, Call Priority, Contact Owner, Teams)		✓
• Individual or team based routing filters on-the-fly		✓
• User Web lead quotas based on lead source		✓
• Time-zone routing restrictions	✓	✓
• Lunch hour block	✓	✓
• Complete visibility of call queues including counts and lists	✓	✓
<b>Appointment Setting and Calendars</b>		
• Calendar display of call backs, appointments and events		✓
• Calendared items automatically route at scheduled time	✓	✓
• Allow appointment setters to see availability on multi-calendars		✓
• Appointment blocking based on appointment or event length		✓
• Manager access to all calendars		✓
• Calendars for external people		✓
• Send Outlook invitations to external people automatically		✓
<b>Calling Scripts</b>		
• Simple call script on same screen as contact information	✓	✓
• Insert contact information variables into scripts	✓	✓
• Logical branch scripting to next best sub-script		✓
• Multiple scripts assigned by team or lead status		✓
• Collect survey/script responses with menu answers or text input fields		✓
<b>Autodialing Option</b>		
• Progressive dialing - automatically dials the next number	✓ Lite Plus Only	✓
• Preview dialing - click-to-dial when ready	✓ Lite Plus Only	✓
• Use eyeBeam or 4.2.0 SKYPE softphone	✓ Lite Plus Only	✓
• Choose your own phone provider and phones - VanillaSoft integrates		✓

## Documents

- Document library ✓
- Merge contact information with PDF forms ✓
- Attach external documents to contact record ✓

## Email

- Integrated Web e-mail to send individual e-mails (no inbox) ✓ ✓
- See email status: opened, un-opened, bounced, email domain checked for accuracy ✓ ✓
- Management-created email templates ✓ ✓
- Route opened emails back to reps immediately ✓ ✓
- View complete email outbox history from contact record ✓ ✓
- Pre-defined or user choice document attachments ✓
- Auto email templates triggered by result code ✓
- Auto response email template to Web leads ✓
- Automatic e-mail notification upon lead status change ✓
- Mass Email through integration with Vertical Response ✓

## Contact Management - Database Querying Engine

- Pre-defined queries ✓ ✓
- Custom Queries ✓ ✓
- Flag or Unflag contacts to put into your call queue ✓ ✓
- Export contacts to an Excel file ✓ ✓
- Batch delete contacts ✓ ✓
- Batch update contact field values ✓
- Mail-Merge contacts with PDF forms ✓
- Copy contacts from one project to another, retaining call history ✓

## Call Recording Option

- Playback of recorded calls from any location with internet ✓
- Recordings attached to contact record ✓
- Filter recordings by date, user, result code and even browse comments to select desired recordings ✓
- Export recording path for external playback ✓
- Download and archive recording files ✓

## User Management

- CRM list-based view of owned leads ✓ ✓
- LinkedIn for contact research ✓ ✓
- Google Maps ✓ ✓
- Filter call queue by a myriad of fields ✓
- Spell checker for Internet Explorer ✓
- User restrictions by project, team, or owned contacts ✓
- Number of users Up to 5 Unlimited

## Reporting

- Pre-defined reports for calling activity ✓ ✓
- Complete Report Builder for Customized Reports ✓ ✓
- Management-defined reports for salespeople ✓ ✓

## Integration - CRM, Do Not Call, Mass emails

- Salesforce.com Enterprise Edition ✓
- Vertical Response Mass email ✓
- Gryphon Do-Not-Call-Compliance ✓

\* Unlimited contacts within reason. VanillaSoft is a CRM designed to store contacts that you are intending to call. We discourage the use of VanillaSoft for a company's list storage and reserve the right to limit storage in extreme cases.