

Product Comparison

Which version is right for me?

Review the MarketSharp^m Product Comparison Chart. You'll be able to assess which solution best fits your business needs.

Features	Descriptions	^m Lite	^m Standard	^m Pro
Prospect Module				
Data Tracking	Prospect section provides 50+ predefined fields to track all prospect contact details, history, activities, notes, demographics, postal, marketing campaigns and customizable fields.		✓	✓
Searching & Filtering	Search for specific prospect data or groups of data with simple to advanced filter lookups.		✓	✓
	Centrally Search Entire Database		✓	✓
	Quick Search Lookup Feature		✓	✓
	Single or Multiple Field Lookups		✓	✓
	Save Favorite Prospect Lookups		✓	✓
	View in single record mode or by list		✓	✓
Marketing	Prospect for new business by implementing hundreds of proven built-in marketing campaigns.		✓	✓
	Edit, Create, Print: Postcards, Letters, Mailers, Labels, Envelopes & Custom Templates		✓	✓
	Showroom Traffic Builders		✓	✓
	Coupon/Certificate Mailers		✓	✓
	Demographic Selected Campaigns		✓	✓
	Proximity Marketing		✓	✓
Reporting	Monitor prospect marketing activity with built-in list reports and logs.		✓	✓
Jobsite Radius Feature	In minutes implement a jobsite radius campaign to generate business from neighbors surrounding a completed worksite.		✓	✓

Lead Module				
Data Tracking	Leads section provides 75+ predefined fields to store and track complete lead details.	✓	✓	✓
	All Contact Information & Notes	✓	✓	✓
	Multiple phone numbers and emails	✓	✓	✓
	Appointment Details & Results	✓	✓	✓
	Lead Sources	✓	✓	✓
	Product Interests	✓	✓	✓
	Lead Activities, Tasks and Processes	✓	✓	✓
	Additional Contacts or Company Info	✓	✓	✓
	Document & Marketing Tracking	✓	✓	✓
	Completed Activity History	✓	✓	✓
	Custom Fields	✓	✓	✓
Searching & Filtering	Search for specific lead, appointment, salesperson data or groups of data with simple to advanced filter lookups.	✓	✓	✓
	Centrally Search Entire Database	✓	✓	✓
	Quick Search Lookup Feature	✓	✓	✓
	Single or Multiple Field Lookups	✓	✓	✓
	Save Favorite Lead Lookups	✓	✓	✓
	View in single record mode or by list	✓	✓	✓
Marketing/ Document Center	Turn more leads into sales by utilizing pre-formatted correspondence, forms, marketing campaigns and sales aides.	✓	✓	✓
	Edit, Create, Print: Forms, Postcards, Letters, Mailers, Labels, Envelopes & Custom Templates	✓	✓	✓
	Edit, Create, Send: Email Templates	✓	✓	✓
	Pre-Appointment/Confirmation Correspondence	✓	✓	✓
	Lead Sheets/Appointment Lists	✓	✓	✓
	Sales Closing Tools	✓	✓	✓
	Product Measuring Forms	✓	✓	✓
	Follow-up Letters and Surveys	✓	✓	✓
	Home Show Campaigns	✓	✓	✓
	Seasonal, Current Event & Opportunity Promotional Campaigns	✓	✓	✓
Reporting	Monitor sales performance by evaluating your sales team, campaigns and product interests.	✓	✓	✓
	Analyze Closing Ratios	✓	✓	✓
	Review Lead Sources and Lead Costs	✓	✓	✓
	Evaluate Appointment Results	✓	✓	✓
	Monitor Total Sales, Pending Sales and Cancellations	✓	✓	✓

Customer Module				
Data Tracking	The Customer section provides 100+ predefined fields to store and track complete customer details.	✓	✓	✓
	All Customer Contact Details and Notes	✓	✓	✓
	Multiple Phone Numbers & Emails	✓	✓	✓
	Additional Contacts or Company Info			
	Retains All Lead Details & Activity History	✓	✓	✓
	Contract Amounts, Payments and Status	✓	✓	✓
	Financial Data & Loan Status	✓	✓	✓
	Job Numbers, Job Types & Job Status	✓	✓	✓
	Jobsite Addresses and Directions	✓	✓	✓
	Product Description & Purchase Details	✓	✓	✓
	Document & Marketing Tracking	✓	✓	✓
	Customer Activities, Tasks and Process	✓	✓	✓
	Satisfaction Survey Data	✓	✓	✓
	Future Product Interests	✓	✓	✓
	Testimonial Statements and Attachments	✓	✓	✓
	Completed Activities History	✓	✓	✓
	Custom Fields	✓	✓	✓
Searching & Filtering	Search for specific customer, contract, job data or groups of data with simple to advanced filter lookups.	✓	✓	✓
	Centrally Search Entire Database	✓	✓	✓
	Quick Search Lookup Feature	✓	✓	✓
	Single or Multiple Field Lookups	✓	✓	✓
	Save Favorite Customer Lookups	✓	✓	✓
	View in single record mode or by list	✓	✓	✓
Marketing/ Document Center	Create lifetime customers by implementing relationship-building marketing for repeat and referral marketing, annual promotions, plus project a first-class image with built-in personalized preformatted correspondence.	✓	✓	✓
	Edit, Create, Print: Forms, Postcards, Letters, Mailers, Labels, Envelopes & Custom Templates	✓	✓	✓
	Edit, Create, Send: Email Templates	✓	✓	✓
	Thank You Messages	✓	✓	✓
	Annual Promotional Campaigns	✓	✓	✓
	Seasonal/Special Offer Promos	✓	✓	✓
	VIP Guest – Home Show Campaign	✓	✓	✓
	Showroom/Open House Mailer	✓	✓	✓
	Referral Campaigns	✓	✓	✓
	Future Interest Mailers	✓	✓	✓
	Customer Reference Lists	✓	✓	✓
	Customer Satisfaction Surveys	✓	✓	✓

		^mLite	^mStandard	^mPro
	Product Completion Certificates	✓	✓	✓
	Project Job Summary	✓	✓	✓
	Job Completion Envelope Labels	✓	✓	✓
	Invoice/Balance Due Statements	✓	✓	✓
	Payment Reminders Correspondence	✓	✓	✓
	Do Not Call Release Form	✓	✓	✓
Reporting	Choose detailed or summary reporting to measure customer activity, identify product trends, forecast revenue, and monitor sales volume.	✓	✓	✓
	Sales Volume by Company	✓	✓	✓
	Sales Volume by Product	✓	✓	✓
	Sales Volume by Salesperson	✓	✓	✓
	Balance Due Reporting	✓	✓	✓
	Production Status			✓
	Service Status			✓
Additional Modules				
Proposal Creator	Find, track and print professional proposals to provide an estimate to prospective clients.			✓
	Track All Proposal Details: Price Quoted, Discount Offered, Date Sent and Proposal Status			✓
	Edit, Create and Print Proposals			✓
	Use Preformatted or Custom Designed Proposal Templates			✓
	Personalize Templates Easily with Snippet Technology			✓
	Send Personalized Follow-up Letters with Each Proposal			✓
Production Utility	Find, track, create and print production information about project specifics			✓
	Track All Production Details about Work Crews Completion Dates or Job Notes			✓
	Assign Production Processes for every task for each product sold			✓
	Edit, Create and Print Production Work Orders			✓
	Use Preformatted or Custom Designed Proposal Templates			✓
	Personalize Templates Easily with Snippet Technology			✓
	Schedule Production Installations within ^m Calendar for work crews and/or equipment			✓
	Filter and Find Production by Crew, Salesperson, Description, Product, Task Type and/or Date in List format			✓
	View and Report on Production Tasks and Status of work			✓

		^mLite	^mStandard	^mPro
Commission & Job Costing Calculator	Record and Track Salesperson Commission and Job Costs.			✓
	Track All Commission details of Dates, Commission Amount, Adjustments, Payments, Commission Description and Notes			✓
	Itemized Product costs for material, labor, marketing and miscellaneous items.			✓
	Track dates, amounts, types, vendors and notes			✓
	View and Report on Total Revenue, Total Cost, Total Profit and Profit Percentage of Job			✓
Service Calls	Find, track, create and print service requests to assign to a service representative for prompt completion.			✓
	Track All Service Details: Product Type, Service Rep, Request and Completion Dates, Service Amount and Status			✓
	Record Warranty Details			✓
	View Service History			✓
	Edit, Create and Print Service Work Orders			✓
	Use Preformatted or Custom Designed Service Templates			✓
	Personalize Templates Easily with Snippet Technology			✓
	Schedule Service Calls within ^m Calendar			✓
	Filter and Find Service calls by Status, Service Rep and/or Date in List format			✓
QuickBooks Web Connector	Eliminate Double Entry by easily importing contact information from MarketSharp ^m to QuickBooks®			✓
	Schedule periodic data checks to automatically push customer, job and financial details into Quick Books®.			✓
Special Features				
^mCalendar	Easily schedule, view and print important details with the on-screen appointment calendar.	✓	✓	✓
	My Calendar View	✓	✓	✓
	Sales Calendar View	✓	✓	✓
	Production/Service Calendar View			✓
	View Day, Week, Month, Year or by Agenda	✓	✓	✓
	Show one or multiple schedules for individuals or groups sorted by salespeople, production*, work crews*, service reps*, other employees, equipment or	✓	✓	✓

miscellaneous				
Activity Processes	Customize and activate preset “to do” tasks of one step or multiple steps for one or many employees. i.e. Pre-Appointment Process (Send out literature kit, email appt confirmation and conduct courtesy confirmation call)	✓	✓	✓
	Create, Edit or Delete Activities	✓	✓	✓
	Track activity details of type, reference, assigned to, due date, reminder, completion and notes.	✓	✓	✓
	View All, Complete or Non-Complete Activities and update status	✓	✓	✓
	Marketing Processes for Prospects, Leads or Customers	✓	✓	✓
	Sales Follow-up for Prospects, Leads or Customers	✓	✓	✓
	View Or Print Activities, Tasks and Process in a list format	✓	✓	✓
Activity Reminders	Upon opening the system, the user will see a reminder screen showing only their current activities to be completed	✓	✓	✓
Attachment Tool	Attach multiple documents, photos, scans, etc. to a specific prospect, lead or customers contact record and additional attachments can be added for testimonials	✓	✓	✓
Mapping	Direct mapping links are available to map contact and jobsite addresses	✓	✓	✓
Exporting/Integration	Export activity, production* lists or custom created lists to Microsoft Excel® utilizing the Export link option.	✓	✓	✓
Customization	Personalize and specialize your program by creating custom details to fit your business needs.	✓	✓	✓
	Remove, add or edit custom fields	✓	✓	✓
	Custom field types include text, drop down, date, currency, number, check box, and drop down list	✓	✓	✓
	Custom fields can be used for searching, filtering, and reporting on	✓	✓	✓
	Customize activities and processes	✓	✓	✓
	Remove, add or edit drop-down values	✓	✓	✓
	Create and Save custom filters	✓	✓	✓
	Create and save custom list views	✓	✓	✓
	Create and save new print files	✓	✓	✓
Do Not Call Compliance	Process and flag phone numbers that are listed on the federal, change, and state do not call registry so they can be excluded from marketing campaigns.	✓	✓	✓

Admin Utilities				
Company Profile	Maintain company information, company logo, postal data, and preferences.	✓	✓	✓
	Company information will automatically merge into mailers, letters, reports, etc. when printed.	✓	✓	✓
Employee Set Up/ Permissions	Organize your team for optimum efficiency with Role Based assignment and setup.	✓	✓	✓
	Set up allows you to create or modify individual information, select employee type, and inactivate employees.	✓	✓	✓
	Create and Edit unique passwords for each employee	✓	✓	✓
	Specify user permission levels to allow employees access and read/write/delete capabilities for all or only specific areas of the program.	✓	✓	✓
Process Set Up	The Admin can systemize and automate ALL your business processes – quickly set up and assign tasks to streamline your business activities.	✓	✓	✓
	Set up and Maintain Activity Process for Admin, Sales and Marketing	✓	✓	✓
	Set up and Maintain Production Processes to design work flows for jobs			✓
Document Set Up	Set up new templates and define snippets for Proposals, Work Orders and Service			✓
Data Security/ Sharing & Back Up	Secure online system allows for multiple user sharing with immediate data storage	✓	✓	✓
	Assign user level permissions and access specifications	✓	✓	✓
	Share data with 50+ users	✓	✓	✓
	Data is automatically backup and securely stored offsite. However, Admins can download backup data weekly.	✓	✓	✓

mLite mStandard mPro

Added-Value				
Turn-Key Package	Leverage a turn-key system with easy one-time set-up options with no advanced configuration required.	✓	✓	✓
Ease of Use	Intuitive design and logical processes help end-users (at all levels of computer knowledge) quickly master key functionality	✓	✓	✓
Web-Based System	Connect multiple users in multiple office settings to share every contact, job and reporting detail	✓	✓	✓
Share & Exchange Industry Advice	Become part of the exclusive MarketSharp User Group. Take full advantage of the opportunity to exchange information, ideas and proven strategies critical to your business with thousands of other industry leaders.	✓	✓	✓
Support	Maximize your results with personalized customer support. The support team provides assistance with technical and how to advice to improve your effectiveness.	✓	✓	✓
Training	MarketSharp Online University Webinar trainings offer guidance from beginner to advanced to shorten the learning curve.	✓	✓	✓
Marketing Resources	An arsenal of marketing tools has been designed to improve your overall success.	✓	✓	✓

*Additional Module Required

For More Details Call 1-800-335-4254