Features	TALYGEN	Epicor
CRM		
Contact Management		
Contacts & Task Management	✔	✔
Email Integration	✔	✔
Import Data	✔	✔
Customer Portal/Account	✔	✔
Customer Interactions	✔	✔
Case Management	✔	✔
Contact Timelines	✔	✔
Workflow Automation	✔	✔
File Sharing	✔	✔
Document Management	✔	✔
Sales		
Accounts Management	✔	✔
Opportunity Management	✔	✔
Activity Streams	✔	✔
Personalized Dashlets & Homepage	✔	✔
Activity Tracking & History	✔	✔
Product Catalog & Tracking	✔	✔
Quote Management	✔	✔
Sales Opportunity Forecasting	✔	✔
Sales Team Management	✔	✔
Sales Email Campaigns	✔	✔
Sales Automation	✔	✔
Contacts	✔	✔
Feeds	✔	✔
Product Customization	✔	✔
Unlimited Records	✔	✔
Custom Modules	✔	✔
Time-Based Actions	✔	✔
Custom Related Lists	✔	✔
Sales Force Automation	✔	✔
Sales Tracking	✔	✔
Customer Service Management	✔	✔
Task And Event Tracking	✔	✔
Quotation	✔	✔
Invoice	✔	✖
Purchase Order	✔	✔
Sales Order	✔	✔
Deal Stages	✔	✖
Create Custom Reports	✔	✔
Marketing		
Drip Campaigns	✔	✔
Email Marketing	✔	✔
Newsletter Management	✔	✖
Marketing Management	✔	✖
Lead Generation	✔	✔

Marketing Campaigns	✔	✘
Service		
Case/Ticket Management	✔	✔
Manage Prospect, Leads And Opportunities	✔	✔
Convert Prospect, Lead, Opportunity To Project	✔	✘
Advanced Case Escalation	✔	✘
Bug Management	✔	✘
Knowledge Base	✔	✘
Access To 100+ Admin Services	✔	✘
Ease Of Use		
Custom Fields	✔	✔
Customize The Communication Type	✔	✘
Campaign Wizard	✔	✔
Multiple Currencies	✔	✘
File Sharing	✔	✔
Document Management	✔	✔
Collaboration		
Client Management/ Client Login	✔	✘
Link Contacts With Tasks/Projects	✔	✘
Project Request By The Client	✔	✘
Time Tracking		
Time Track		
Automatic Time-Tracking	✔	✘
Billable And Non Billable Time Tracking	✔	✘
Add Manual Time Entry	✔	✘
Bulk Time Entry	✔	✘
Timesheet	✔	✘
Offline Mode	✔	✘
Overtime Tracking	✔	✘
Meal Break Support	✔	✘
Time Off Request Management	✔	✘
Fast And Simple Employee Time Entry	✔	✘
Time Tracking With Screenshot	✔	✘
Audit		
Screenshots	✔	✘
Work Diary	✔	✘
Mouse Click	✔	✘
Keyboard Click	✔	✘
Multi Screen Management	✔	✘
Approval Rule	✔	✘
Activity Log	✔	✘
Website Tracking	✔	✘
Application Tracking	✔	✔
Screen Recording	✔	✘
Webcam Image Capturing	✔	✘
Activity Flagging	✔	✘
Silent Monitoring	✔	✘
Ease Of Use		
Billable And Non Billable Time Tracking	✔	✘
Upgrade Anytime, Keep Data	✔	✘

Task-Level Time Tracking	✔	✘
View Time Entry In Calendar And Listing View	✔	✘
Collaboration		
Client Management/ Client Login	✔	✘
Link Contacts With Tasks/Projects	✔	✘
Project Request By The Client	✔	✘
Client Can Review Screenshots	✔	✘
Client Can Review Work Diary	✔	✘
Expense Tracking		
Data		
Data Control	✔	✔
Multi Branch Management	✔	✘
User Roles & Permissions	✔	✘
Payments		
Receipt Photos	✔	✘
Receipts	✔	✘
Project Managers, Team Timesheets, Team Expense Reporting	✔	✘
Daily Allowances	✔	✘
Customize The Category And Trip Name	✔	✘
Setup Expense Approval Rule As Per Project	✔	✘
Efficient Approval & Control On Expense Level	✔	✘
Custom Expense Policy Rules	✔	✘
Travel Allowances	✔	✘
Invoice		
Invoicing & Bill Processing	✔	✘
Define Tax Formulas	✔	✘
Allocation		
Project Allocation	✔	✘
Reporting		
Export Timesheets	✔	✔
E-Mail Reports	✔	✔
Reporting	✔	✔
Exporting Reports To Excel (XLS)	✔	✘
Rounding And Decimals In Reports	✔	✘
Your Company Logo In Reports	✔	✘
Visual Reporting	✔	✘
Detailed Reports	✔	✘
Uninvoiced Report	✔	✘
Generate Expense Reports	✔	✘
Support For Various Timesheet Formats	✔	✘
Configurable Reports	✔	✘
Location Based Reporting	✔	✘
Timesheets Approval	✔	✘
Manage Time With Timesheets	✔	✘
Time Tracking		
Manual Entry (Within App (Not Time Sheets))	✔	✘
Automate (Stop Watch/Timer)	✔	✘
Workflows		
Multi-Stage Approval Workflow	✔	✘
Custom Business Logic	✔	✘

Security & Backup Procdures	✔	✘
Card Integration	✔	✘
Ease Of Use		
Receipt Uploads	✔	✘
Detection Of Duplicate Expenses	✔	✘
Upload Files, Images With Expense	✔	✘
Bulk Upload Of Expense	✔	✘
Project Management		
Basic PM Tools		
Time Tracking / Timesheets	✔	✔
Project Milestones	✔	✘
Setup Milestones And Convert Them To Invoices Directly	✔	✘
Setup Expense Limit	✔	✘
Tasks Management	✔	✘
Tasks (Sub-Projects)	✔	✘
Global Tasks	✔	✘
Project Planning	✔	✘
Project Forecasting	✔	✘
Break Projects Down With Tasks	✔	✘
Project Level Permissions	✔	✘
Gantt Chart	✔	✔
Project Roadmap	✔	✘
Workflow System	✔	✘
Configurable Approval Workflows	✔	✘
Flexible Workflow And Approvals	✔	✘
Portfolio Management	✔	✘
Issue Tracking	✔	✔
Practice Management	✔	✘
Resource Management		
Resource Management	✔	✔
Skills Management	✔	✔
Project And Resource Forecasting	✔	✘
Program Management/ Event	✔	✘
Allocation-Based Estimates	✔	✘
Scheduling	✔	✘
Asset Management	✔	✔
Project Request	✔	✔
24/7 Monitoring To Ensure Availability	✔	✘
Unlimited Team Size	✔	✘
Document Management		
Document Editing	✔	✔
Document Sharing And Storage	✔	✔
Project Integration	✔	✘
Access Rights Management	✔	✘
Document Versioning	✔	✘
Import From External Resources (Excel, GoogleDocs, Etc)	✔	✘
View Company Knowledgebase	✔	✘
Communication		
Project Message Board	✔	✘
Socialize Feature For Inter User (Chat Within A Company)	✔	✘

Group Chat (Chat Within A Company)	✔	✔
Client Login (Login Available For Client)	✔	✔
Forum	✔	✔
Blogs	✔	✔
Integration With Third Parties Services		
Import Basecamp Data	✔	✘
Google Apps Integration	✔	✘
Freshbooks Integration	✔	✘
Salesforce Integration	✔	✘
QuickBooks Integration	✔	✘
Outlook Integration	✔	✘
MS Project Integration	✔	✘
Collaboration		
Client Management/ Client Login	✔	✔
Link Contacts With Tasks/Projects	✔	✘
Project Request By The Client	✔	✘
Ease Of Use		
Project Templates	✔	✘
Copy/ Clone Projects	✔	✘
Customizable Dashboards	✔	✘
Cloud Based Storage	✔	✔
View Project Detail	✔	✔
Backups	✔	✔
Mobile Apps	✔	✔
Drag And Drop Functions	✔	✘
Resource Import Tools	✔	✘
Integrated Help	✔	✘
Continuous Enhancements Included	✔	✘
Time Zone Conversions	✔	✘
Reporting		
Report Generation	✔	✔
File Dashboard	✔	✔
Can Manage Company Storage Into Screenshots, Project Storage And Doc Storage	✔	✘
Useful Reporting For Projects	✔	✘
Assignments	✔	✘
Reports For Dashboard	✔	✔
Exportable Reports	✔	✔
Billing		
Billing Management	✔	✔
Flexible Billing Rate Management	✔	✘
Flexible Workflow And Approvals	✔	✘
Balance And Accrual Calculations	✔	✘
Track And Manage Expenses By Project	✔	✘
Milestone Alerts	✔	✘
Time And Expense Based Billing	✔	✔
Project Quotes	✔	✘
Invoices		
Invoicing		
Multi-Currency Online Invoicing	✔	✔
Invoice Integration	✔	✔

Personalized Invoices	✔	✔
Invoice Generation	✔	✔
Recurring Invoices	✔	✔
Batch Invoices	✔	✔
Import Time/Expense	✔	✔
Customized Rules For Automated Invoicing	✔	✔
Calculate The Discounts As Sequential Or Stack	✔	✘
Utility Billing	✔	✘
Billing Rule	✔	✘
Invoice Import	✔	✘
Flag Automation	✔	✘
Rate Schedule	✔	✘
Billing Services	✔	✘
Dynamic Reporting	✔	✔
Specify The Period(In Months) The Received/Due Amount Displayed	✔	✘
Payment		
Full Budget Management	✔	✔
Manage Budgets	✔	✔
Online Payment	✔	✘
Multi-Currency Support	✔	✔
Time And Expense Entry For Billing	✔	✘
Payment Reminders	✔	✘
Credit Notes	✔	✔
Easy-To-Use Expense Reports	✔	✔
Tax Formulas Automate Tax Calculations	✔	✘
Setup Default Tax And Discount Rates	✔	✘
Calculate The Discounts As Sequential Or Stack	✔	✘
Receipts		
Attach Receipts	✔	✘
Remittance Slip	✔	✘
Upload Of Digital Receipts	✔	✘
Emails		
Email Reports To Managers	✔	✔
Email Integration	✔	✔
Emails Overdue Statements	✔	✔
Ease Of Use		
Automated Notifications	✔	✘
View Invoice	✔	✔
Manage Different Status Of The Invoices	✔	✘
Automatic Send Invoice As Email	✔	✘
Automate The Invoice Number	✔	✘
Rounding Rules	✔	✘
Collaboration		
Client Management/ Client Login	✔	✘
Link Contacts With Tasks/Projects	✔	✘
View Invoices And Pay	✔	✘
HR Management		
Users & Roles		
Job Descriptions	✔	✔
Employee Logins	✔	✔

Employee Profiles	✔	✔
Administrators	✔	✔
Employee Management		
Dashboard	✔	✔
Timesheet	✔	✔
Dynamic Report Generator	✔	✔
Biometric Attendance	✔	✔
Leave Tracker	✔	✔
Attendance Policy	✔	✘
Leave Policy	✔	✘
Resignation Management	✔	✘
Approval Rule	✔	✘
Leave Slots	✔	✘
Dispute Management	✔	✘
Attendance	✔	✔
Assets	✔	✔
Organizational Chart	✔	✔
Leave Management		
Balance And Accrual Calculations Of Time Off	✔	✔
Flexible Time Off Approval Workflows	✔	✔
Support Of Custom Time Off Types	✔	✔
Calendar View Time Off Scheduling	✔	✔
Submit Time Off Requests	✔	✔
Recruitment		
Create Vacancies & Publish	✔	✔
Manage The Company Recruitments	✔	✘
Have External Job Layout, Manage The Layout For Same	✔	✘
Managers Can Send Requisition To HR For Hiring	✔	✘
Manage The Applicants Applying For The Job	✔	✘
Convert The Applicant To User Once Hired	✔	✘
On-Boarding For New Hires Individually Or In Batches	✔	✘
Human Capital Management	✔	✘
Resume Parsing	✔	✘
Hiring Policies	✔	✘
Interview Schedule	✔	✔
Job Requisition	✔	✘
Talent Pool	✔	✘
Offer Management	✔	✘
Candidate Rating	✔	✘
Candidate Reference Program	✔	✘
Assessment	✔	✘
Recruitment Store Front	✔	✘
Talent Management	✔	✘
Performance		
Performance Management	✔	✔
Automated Employee Performance Appraisals	✔	✘
Competency Management	✔	✘
Employee Feedback And Recognition	✔	✔
Team Reviewers	✔	✔
Review Managers	✔	✔
Benefits Administration		

Employee Self-Service	✔	✘
Employee Time-Off Tracking	✔	✘
Succession Planning	✔	✘
Goal Management	✔	✔
Customize Work Flows	✔	✘
Active Directory / LDAP Plugin	✔	✘
Setup Accrual	✔	✘
Setup Working Week Shift Wise	✔	✘
Convert NOn Working Day As Working For Specific Users	✔	✘
Manage And Track Attendance With In And Out Time	✔	✘
Approval Rule	✔	✘
Setup Bonus Leave	✔	✘
Ease Of Use		
Employee/Corporate Directory	✔	✘
Setup Company Holiday Location Wise	✔	✘
Customize Leave Type	✔	✘
Knowledge Base	✔	✔
Dashboard	✔	✔
File Sharing	✔	✔
Document Management	✔	✔
Appointment Calendar		
Calendar Management	✔	✘
Group Scheduling	✔	✘
Meeting Room Booking	✔	✘
Online Scheduling	✔	✔
Payment Processing	✔	✘
Recurring Appointments	✔	✘
Reminders	✔	✔
Reservations	✔	✔
Customization/Branding	✔	✘
Reporting And Analytics	✔	✘
Website Integration	✔	✘
Google Calendar Linking	✔	✘
Email Marketing	✔	✔
Compatiblity		
IPhone App	✔	✔
Android App	✔	✔
Windows Phone App	✔	✔
Blackberry App	✔	✔
Windows Desktop App	✔	✔
Linux Desktop App	✔	✔
Mac Desktop App	✔	✔
Help & Support		
Email	✔	✔
FAQs	✔	✔
Live Chat	✔	✔
Telephone	✔	✔
Tutorials	✔	✔
Forum	✔	✔
Webinar	✔	✔

User Guide	✔	✔
Blogs	✔	✔
Other Key Features		
Multi-Lingual/Localization	✔	✔
Multi-Currency	✔	✔
SSL Secure	✔	✔
DEVELOPER API	✔	✔
On-Premise Installation	✔	✔
Add-Ons And Other Integration		
Google Calendar	✔	✘
Microsoft Exchange	✔	✔
INTUIT QUICKBOOKS	✔	✘
Freshbooks Integration	✔	✘
FSM/Ticketing		
FSM/Ticketing	✔	✔
Work Order Management	✔	✔
Scheduling And Dispatching	✔	✔
Mobile App	✔	✔
Invoicing And Time Tracking Integration	✔	✘
Capture Video On-Site	✔	✘
Zone Management	✔	✘
Heat Map	✔	✘
Live Locator Tracking	✔	✘
Ticket Activity Tracking	✔	✘
Digital Workflows	✔	✔
Merge	✔	✘
811 Call Center Integration	✔	✘
Centralized Customer Portal	✔	✔
Reporting And Analytics	✔	✔
Route Planning And GPS Integration	✔	✘
Service Level Agreement	✔	✘
Form Builder	✔	✘
Crew Allocation	✔	✘
Rule Engine	✔	✘
Asset Management	✔	✔
Knowledge Base	✔	✔
Locator Helpdesk	✔	✘
Non-Locator Helpdesk	✔	✘
Social Media Integration	✔	✔
Communication	✔	✔
Time Tracking	✔	✔
Feedback	✔	✘
Map Integration	✔	✘
Event Management		
Event Management	✔	✘
Event Planning	✔	✔
Registration	✔	✘
Venue Management	✔	✘
Speaker Management	✔	✘
Marketing	✔	✔

Communication	✔	✔
Reporting And Analytics	✔	✔
Payment Processing	✔	✖
Ticketing	✔	✖
Google Calendar Integration	✔	✖
Budget Management	✔	✔
Recurring Events Setup	✔	✖
Store Front	✔	✖
Attendees Management	✔	✔
Social Media Integration	✔	✔
Availability Management	✔	✖
Project Tracker	✔	✔
Virtual/Physical Events	✔	✖
Ticket Sale	✔	✖
Discount And Coupon	✔	✖
Policy	✔	✖
FAQs Management	✔	✖
Donation	✔	✖
Event Wishlist	✔	✖
Resource Management	✔	✔
Custom Dashboard	✔	✖
Asset Management		
Asset Management	✔	✔
Barcode/QR Code Scanning	✔	✔
Asset Requisition	✔	✔
Assets Life Cycle Management	✔	✖
Requisition Checkout Time	✔	✖
Calibration, Audit And Image Capturing	✔	✖
Mobile Scanning	✔	✖
Self-Checkout	✔	✖
Depreciation Management	✔	✖
GPS Tracking	✔	✖
Asset Deployment	✔	✖
Integration With RFID	✔	✔
Asset Tracking	✔	✔
Inventory Management	✔	✔
Asset Disposal	✔	✖
Push Notifications	✔	✖
Mobile App	✔	✔
Custom Asset Categories	✔	✖
Asset History	✔	✖
Asset Reservations	✔	✖
User Permissions	✔	✖
Dashboard And Analytics	✔	✔
Alerts And Notifications	✔	✖
Asset Documentation	✔	✖
UCAS		
UCAS	✔	✖
Messaging	✔	✖

Voice Calls	✔	✘
Video Call	✔	✘
File Sharing	✔	✘
Team Collaboration	✔	✘
Contact Management	✔	✔
Integration With CRM	✔	✔
Sangoma And Ticketing Integration	✔	✘
Group Chats	✔	✘
Messaging By Project	✔	✘
Communication History And Logs	✔	✘
Personalized Communication	✔	✘
Unified Messaging	✔	✘
Call Routing & Forwarding	✔	✘
Virtual Meetings & Conferencing	✔	✘
Calendar Integration	✔	✔
Training		
Training	✔	✘
Online Training	✔	✘
Physcial Training	✔	✘
Venue Management	✔	✘
Trainer Allocation	✔	✘
Attendees Management	✔	✔
Recurring Trainings	✔	✘
Document Sharing	✔	✘
Questionaire Setup	✔	✘
Attendance	✔	✔
Training Feedback	✔	✘
Star Rating	✔	✔
Reports And Analytics	✔	✔
Document Storage		
Document Storage	✔	✔
Smart, Secure Files Sharing	✔	✔
Third-Party Storage Systems	✔	✔
Access To Unlimited Folders	✔	✔
Drag And Drop To Upload Files/Folders	✔	✘
Manage Cloud-Based Storage	✔	✔
Personalized Storage Space For Team Members	✔	✘
Grant Guest Access To Files	✔	✘
Assign Storage Space To Clients	✔	✘
Preview Of Folders And Files	✔	✔
Flexible Configuration	✔	✘
Restore Files From Recycle Bin	✔	✔
Setup External Access With Expiration Date	✔	✘

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