**CRM Customization**

As an open source solution, xTuple allows customers to personalize the application as they want. Training classes, online videos, development extensions and documentation are examples of resources that help the community involved to add or extend functionalities in their applications. Developers are able to design a new screen or even generate custom commands and reports.

There are basically two forms to do the customization:

* Custom development by the source code available on SourceForge

This option requires understanding of the source code application and extension tools provided by the company.

* Assisted by xTuple’s Developer Team

In this option, the customer submits a proposal of enhancement or modification to the xTuple team, which is high-skilled on the ERP and will analyze if it is possible to implement it for the customer and the base xTuple package as well.

In case of being a business specific proposal which is not applicable for the base package, the customer can pay for XTN (xTuple Network) services. They guarantee safe upgrades with older versions of database and customizations previously implemented.

"XTuple Custom Development Services." XTuple Custom Development Services | XTuple. XTuple, n.d. Web. 30 Mar. 2015. <http://www.xtuple.com/custom-development>.

**ERP Integration**

XTuple ERP is supported by Windows, Linux and Mac because it uses open source technologies, so one binary source code is installed quickly on any of these operating systems. There is also a mobile web client that uses HTML5, which means that it can be accessed on any browser that supports it.

The CRM solution does not have integration with social media plugins or office applications, but the marketplace offers extensions with additional features related to functional areas.

A paid extension (Connect) helps managing reports and incidents from xTuple to outside systems and vice-versa by batch jobs.

"XTuple Connect Product Guide." 1. What Is XTuple Connect? XTuple, n.d. Web. 30 Mar. 2015. <http://www.xtuple.org/sites/default/files/prodguide/connect/pr01s01.html>.

**Technical issues on implementation**

In case of using the cloud application, the procedures are simple. It is just needed to download and extract the zip file which contains the GUI client for connection to the server and then type the access information. On the other hand, a stack should be matched in order to install the on premise solution. The application consists basically of a GUI client and a PostgreSQL database, so it is likely to have knowledge configuring and managing this database for xTuple. Also, both ways relies on a secure connection established between client and server; if there is a problem on this communication channel probably the user will not be able to send information through the ERP instances.

The CRM module has an interface basically made of field names and values, which makes it straightforward to set up. Few menus present the registered information on categories such as projects, contacts and sales orders.

"How Do I Set up PostgreSQL and Install PostBooks®? | XTuple." *How Do I Set up PostgreSQL and Install PostBooks®? | XTuple*. XTuple, n.d. Web. 30 Mar. 2015. <http://www.xtuple.com/installing-postbooks-database>.

8) Briefly describe 5 additional CRM applications that are popular in the industry.

1. Salesforce.com

One of the CRM sales and marketing leaders, it offers cloud-based solutions. The products are categorized on sales, service (intelligent agents for customer support), marketing, community (integration of partners, customers and employees through a communication channel) and analytics. Additional B2B and small business solutions are provided as well.

The company has a platform for app development of its products. It allows developers (employees or even customers) to create any personalized app and exchange it on the marketplace. The information is integrated through the products and can be accessed through apps on mobile devices.

Pricing for products ranges according to the category of user: group, professional, enterprise or unlimited. Some solutions have another category names, but they are generally divided into three: standard, pro and business. All licenses are billed annually and require an annual contract as well.

"Cloud Apps and Platform - Salesforce.com Canada." *Salesforce.com*. Salesforce, n.d. Web. 30 Mar. 2015. <http://www.salesforce.com/ca/products/>.

"Salesforce." *Reviews of : Free Pricing & Demos : Customer Relationship Management Software*. Capterra, n.d. Web. 30 Mar. 2015. <http://www.capterra.com/customer-relationship-management-software/spotlight/61368/Salesforce/Salesforce%20com>.

1. Microsoft Dynamics CRM

Software package that takes part of Microsoft business solutions line. Focused mainly on Sales, Marketing and Customer Service. The application runs on the browser or by an Outlook plugin, allowing synchronization with Exchange as well. Mobile version supports Windows 8, iPad and Android tablets.

For Customer Service, there are solutions such as case management prioritized by KPI and Social Listening, which enables monitoring of products, brands and campaigns based on media channels like Facebook or Twitter. Another basic features for S&M are campaign management, process automation and product families.

Pricing is defined selecting one of four functional areas (Sales, Service, Marketing or Social) and the type of license (Professional or Enterprise). The final price depends on how many months and users will be using it.

"Win and Retain Customers." *Microsoft Dynamics*. Microsoft, n.d. Web. 30 Mar. 2015. <http://www.microsoft.com/en-us/dynamics/crm.aspx>.

"Browser Compatibility with Microsoft Dynamics CRM 2011." *Browser Compatibility with Microsoft Dynamics CRM 2011*. Microsoft, 20 Nov. 2014. Web. 30 Mar. 2015. <http://support.microsoft.com/en-ca/kb/2784954>.

*Microsoft Dynamics CRM 2015 Release Preview Guide*. N.p.: Microsoft, Sept. 2014. PDF.

1. Zoho

Suite that fits mainly Sales and Marketing of small business. Contains a salesforce automation software which has features for customer lifecycle management. Contacts, leads and campaigns are examples managed by some functions.

A Developer API is available for individuals, enabling to develop applications as well. Custom add-ons can be created for integration with Zoho Apps or third-party applications such as Office and Facebook.

For mobile, there are two features: CRM On-the-go, which provides information tracking of customers either by Apple or Android devices and CRM for Google Apps, which integrates Google Docs and Gmail services with Zoho.

There is a free license (up to 10 users) and standard, professional, enterprise and CRM plus categories. Latter ones are pay-as-you-go, being billed month-to-month or annually.

"Close More Deals in Less Time." *CRM Software, Customer Relationship Management*. Zoho, n.d. Web. 30 Mar. 2015.

1. SugarCRM

Mostly focused on user experience, uses its private interface to let the customer design the dashboard as he or she wants, using drag and drop, for example. Along common CRM features (Sales, Marketing, Workflows and Reporting), it also supports integration with Google Apps, Microsoft Office, Facebook, Twitter, IBM Notes and many others platforms. The product is hosted on cloud.

Nowadays the licenses are Professional, Enterprise and Ultimate. They differ from some features and storage space. All of them need a minimum annual subscription. Another version, a no longer upgraded Community Edition, is free and supported by the developer’s community.

There is a marketplace where users can purchase and download add-ons created by developers. In case of the Community edition, add-ons are provided only by a GitHub repository.

"CRM Software Package." CRM Software Packages and Pricing. SugarCRM, n.d. Web. 30 Mar. 2015.

https://sugarcrm-online.s3.amazonaws.com/products/datasheets/editions-comparison-chart.pdf

"Sugar Community Edition Add-ons." *Sugar Community Edition Add-ons*. SugarCRM, n.d. Web. 30 Mar. 2015.

"SugarExchange: Welcome." *SugarExchange: Welcome*. SugarCRM, n.d. Web. 30 Mar. 2015.

1. Maximizer CRM

Has a simple user interface that integrates business systems with CRM functional areas. It can be deployed on the user’s cloud or on Maximizer’s cloud. If it is deployed on-premise a few Microsoft’s features including MS SharePoint or SQL Server may be also added. All editions allow access by smartphones or tablets.

There are two types of licenses: one for Maximizer CRM and a Wealth CRM, which has additional features for the wealth management industry. Both are billed annually and they have limits for storage in case of a cloud option. Otherwise is up to the client.

"Access Anywhere, On Any Device." *All-In-One CRM*. Maximizer CRM, n.d. Web. 30 Mar. 2015.

*Maximizer CRM Feature Comparison*. Vancouver, BC: Maximizer CRM, 2014. PDF.

Shipley, Renee. "Maximizer CRM Review 2015 | Contact Manager." *TopTenREVIEWS*. Top Ten Reviews, 17 Oct. 2014. Web. 30 Mar. 2015. <http://crm-software-review.toptenreviews.com/maximizer-crm-review.html>.