



Pricing Sheet

		Plan 1	Plan 2	Plan 3	Plan 4
		Out-of-the-box	Customized	Full Suite	Full Automation
Modules	Features	BASIC	STANDARD	PREMIUM	PROFESSIONAL
Data Entry	Customization	OOTB	✓	✓	✓
	Sales Memo Integration (SkySlope, Google Forms, etc.)	-	✓	✓	✓
	Automated Templates (caps, tiers, etc.)	-	✓	✓	✓
Dashboards	Customization	OOTB	✓	✓	✓
	Agent Reports *	-	✓ (up to 25)	✓ (up to 50)	✓ (unlimited)
	Mobile Reports	-	-	✓	✓
Lead Source ROI & Operating Expenses *		-	-	✓	✓
Goal Tracking *		-	-	✓	✓
Lead Conversion *		-	-	✓	✓
Custom Disbursement Authorization Forms *		-	-	✓	✓
Data Input Service		-	-	-	✓
* If module/add-on is not included in your plan, it can be added for \$99/mo. (e.g., Goal Tracking module can be added to Plan 2 for \$99/mo.).		\$249/mo.	\$399/mo.	\$649/mo.	\$999/mo.
		2%	13%	56%	29%

Additional Services & Modules	Calendar year data upload service (0-300 units)	\$699			
	Calendar year data upload service (300+ units)	\$999			
	Custom-built add-ons / modules	\$199/mo.		\$99/mo.	