

Desktop vs. Hosted Solution vs. Web-Based CRM Solution

Attribute	ProTracker Advantage Desktop	ProTracker Advantage Cloud	Other Web-Based CRM Application
Server required	Recommended for multi-user firms	Provided by the remote host	Provided by web-based application
Accessibility	Your personal computer or Virtual Private Network	Use any computer with Internet access	Use any computer with Internet access
Browser Support	Not applicable	Internet Explorer 7 or 8, Firefox, and Safari	Unknown
Data location	On your computer or server	Remote secure data center SAS 70, Type II	Remote at vendor
Data Security	You or your IT Dept	Secured through two-factor authentication using a security key for each user.	Basic web security
Data backup & recovery	You or your IT Dept	Performed by remote host daily	Performed by vendor
Hardware maintenance	You or your IT Dept	Performed by remote host	Performed by vendor
Software installations	You or your IT Dept	Performed by remote host	Performed by vendor
Software upgrades	You or your IT Dept	Performed by remote host	Performed by vendor
Print to any local or networked printer	Yes	Yes	Yes
Scanning documents	Runs locally, fully integrated	Scan directly to Cloud	Unknown

Desktop vs. Hosted Solution vs. Web-Based CRM Solution

Attribute	ProTracker Advantage Desktop	ProTracker Advantage Cloud	Other Web-Based CRM Application
Microsoft Office: Word, Excel, PowerPoint	Installed and maintained locally	Located remotely; fully integrated with ProTracker	Unknown
Microsoft Outlook Email	Installed and maintained locally; integrated with ProTracker Advantage	Located remotely; fully integrated with ProTracker	Unknown
Microsoft Outlook integration with Personal Digital Assistant	Installed and maintained locally; integrated with ProTracker Advantage	Located remotely; fully integrated with ProTracker. Additional monthly fee.	Unknown
Integration with portfolio management system (PMS)	Yes, local integration	Yes. The PMS software can be installed on the remote host for an additional fee. You can also continue with your locally-based portfolio management software (not recommended).	Unknown
IT expertise required	Yes	No	No
Speed	Depends only on your local computer and network environment	Fast, since only screen images are passed over the Internet	Slower, due to web page creations required
CRM feature set	Full CRM feature set	Full CRM feature set	May be a 'lighter' CRM version due to speed issues
Multiple Location Support	Virtual Private Network required	Yes	Yes

Desktop vs. Hosted Solution vs. Web-Based CRM Solution

Attribute	ProTracker Advantage Desktop	ProTracker Advantage Cloud	Other Web-Based CRM Application
Cost	Annual Fee	One-time setup fees; Monthly subscription fee thereafter	Unknown
MAC support	No	Yes	Yes
Linux support	No	Yes	Yes
Data retrieval at termination	N/A	Host will ship all data on encrypted portable hard drive for \$500 fee	Unknown