

# DATASHEET SOFACTO FROM SPRING'20

If in doubt, please check with your Salesforce.com sales contact, your integrator partner and/or our sales department (sales@sofacto.com) or our Customer Success team (customer-success@sofacto.com).

This summary table is used to determine the type of User license required, depending on their role and the business context. Access to features can be defined by the System Administrator, depending on the role of each user in the business context. These limitations can be managed at the profile level (deprecated) or at the permission set level (best practice).

Some features (indicated here €) require the subscription of a feature license, which is optional and payable. For more information, refer to the description of CRUD permissions and our knowledge base available here :

<https://sofacto.force.com/s/article/CRUD-Sofacto?language=fr>

€ Paid feature license  
• Available from Spring '20

| Features and user licenses  | Sales | Finance | Admin | Sofacto Plus Community | API |
|---|-------|---------|-------|------------------------|-----|
| <b>Activity management</b>  |       |         |       |                        |     |
| Quotation follow-up (offers issued/to be issued)  | ●     | ●       | ●     | ●                      | ●   |
| Invoicing follow-up (invoices issued/to be issued)  | ●     | ●       | ●     | ●                      | ●   |
| Monitoring of collection (payments received/to be received)   | ●     | ●       | ●     | ●                      | ●   |
| Calculation of MRR/ARR  |       | ●       | ●     | ●                      | ●   |
| Consultation of Reports and Dashboards (according to the rights defined by the System Administrator)                      | ●     | ●       | ●     | ●                      | ●   |
| Creation of Customized Reports and Dashboards (according to the rights defined by the System Administrator)               | ●     | ●       | ●     |                        | ●   |
| <b>Sales cycle management</b>   |       |         |       |                        |     |
| Creation of quotes (Offers) from an Opportunity or ex-nihilo  | ●     | ●       | ●     | ●                      | ●   |
| Synchronization of quotes (Offers) with Opportunities   | ●     | ●       | ●     | ●                      | ●   |
| Generation of quotes (Offers) in PDF format   | ●     | ●       | ●     | ●                      | ●   |
| Management of Product Configuration and Product Rules   |       | ●       | ●     |                        | ●   |
| <b>Invoice cycle management</b>   |       |         |       |                        |     |
| Generation of invoice(s) in 1 click from an Opportunity and/or an Offer   |       | ●       | ●     |                        | ●   |
| Generation of an itemized invoice from an Opportunity and/or an Offer   |       | ●       | ●     |                        | ●   |
| Creation of invoicing milestones from an Opportunity and/or an offer  |       | ●       | ●     |                        | ●   |
| Generation of a credit note (total or partial)  |       | ●       | ●     |                        | ●   |
| Generation of a Subscription in 1 click from an Opportunity and/or an Offer   |       | ●       | ●     |                        | ●   |
| Invoicing schedule from a Subscription (recurring billing)  |       | ●       | ●     |                        | ●   |
| Group billing of subscriptions  |       | ●       | ●     |                        | ●   |
| Indexed revision of Subscription prices   |       | ●       | ●     |                        | ●   |
| Multi-criteria Invoices search engine   |       | ●       | ●     |                        | ●   |
| Mass export of Invoices in PDF format   |       | ●       | ●     |                        | ●   |
| Regularization of invoicing   |       | ●       | ●     |                        | ●   |
| Pre-validation of invoices  |       | ●       | ●     |                        | ●   |
| <b>Collection management</b>  |       |         |       |                        |     |
| Automatic generation of Payment upon issuance of the Invoice (payment pending)  |       | ●       | ●     |                        | ●   |
| Entering regulations  |       | ●       | ●     |                        | ●   |
| Generation of payment schedules   |       | ●       | ●     |                        | ●   |
| Follow-up of reminders, manual sending of pre-formatted reminder e-mails  |       | ●       | ●     |                        | ●   |
| <b>Collaboration</b>  |       |         |       |                        |     |
| In-context collaboration via Chatter on all Sofacto objects (according to the rights defined by the System Administrator) | ●     | ●       | ●     | ●                      | ●   |
| Consultation and sharing of notes and files (according to the rights defined by the System Administrator)                 | ●     | ●       | ●     | ●                      | ●   |
| Creation and assignment of tasks  | ●     | ●       | ●     | ●                      | ●   |
| <b>Administration System</b>  |       |         |       |                        |     |
| Access to the Sofacto administration panel  |       |         | ●     |                        |     |
| Management of data visibility and access rights   |       |         | ●     |                        |     |
| Automatic assignment of on-board permission sets based on Sofacto User License  |       |         | ●     |                        |     |
| Creation of custom fields and customization of page layouts on Sofacto objects  |       |         | ●     |                        |     |
| Creation of public list views, Reports and Dashboards (according to the rights defined by the System Administrator)       |       | ●       | ●     |                        |     |
| Customization of invoice and credit numbering sequence  |       | ●       | ●     |                        |     |
| Customizing Offer/Invoice/Credit Templates (VisualForce Page)   |       |         | ●     |                        |     |
| Cascade propagation of parameters applied by default (PDF model, VAT rate, analytic axes, nominal accounts, etc.)         |       |         | ●     |                        |     |
| Consideration of the multi-currency of the underlying Salesforce org  |       |         | ●     |                        |     |
| Management of the multilingual interface (FR and EN; other languages possible)  |       |         | ●     |                        |     |
| Management of communication models (direct mail, e-mails)   |       |         | ●     |                        |     |
| Data import via standard Salesforce tools and/or ETL  |       |         | ●     |                        |     |
| <b>Feature Licenses (applied to org)</b>  |       |         |       |                        |     |
| Automation of business processes<br><small>*Requires Sales Cloud "Enterprise Edition" License</small>                     | €     | €       | €     | €                      | €   |
| Generation of invoices from the Offer / Opportunit    | €     | €       | €     | €                      | €   |
| Issuance and/or sending by e-mail of Invoices PDF   | €     | €       | €     | €                      | €   |
| Subscription life cycle management (renewal, interruption...)   | €     | €       | €     | €                      | €   |
| Issuance of reminder emails for unpaid invoices with different frequency and/or intensity                                 | €     | €       | €     | €                      | €   |
| Generation of Sales Entries for export to accounting  |       | €       | €     |                        | €   |
| 2 decimal entries   |       | €       | €     |                        | €   |
| 4 decimal entries   |       | €       | €     |                        | €   |
| Monthly revenue breakdown   |       | €       | €     |                        | €   |
| Prepaid Revenue Estimate Report   |       | €       | €     |                        | €   |
| Multiple businesses   |       | €       | €     |                        | €   |
| Management of one or more company names)  |       | €       | €     |                        | €   |
| Management of one or more Bank Identity Statements for each Company name  |       | €       | €     |                        | €   |
| Submission of invoices on the Chorus PRO portal   |       | €       | €     |                        | €   |
| Submission of Invoices for Designated Accounts  |       | €       | €     |                        | €   |
| Deposit of attachments associated with invoices for Accounts appointeds   |       | €       | €     |                        |     |
| Return of Chorus Pro Technical Status   |       | €       | €     |                        | €   |

## WARNING This document may be obsolete !

Our knowledge base, available online 24x7 at [sofacto.force.com/s/?language=fr](https://sofacto.force.com/s/?language=fr) is the most up-to-date repository. We update it regularly. You will find the description of our features, current and future, as well as recommendations on their implementation and use.

Please note that certain modifications may be made to our application in order to comply with the security or performance guidelines of the underlying platform. These are likely to have an impact on your existing customizations, compliance with our licensing policy (user and/or functionality). Our Support and Customer Success team is at your disposal, do not hesitate to contact us: [customer-success@sofacto.com](mailto:customer-success@sofacto.com)