Empowering SMBs with Big Business Tools

Feature List

August 2018

The Right Plan, For Every Business

vCita's all-in-one business management solution offers a wide range of value-bringing features for SMBs. vCita includes a set of bundled feature packages, specifically designed to meet everyone's unique business needs and help them grow their business.

No matter which plan: the vCita solution allows an easy and hassle-free set up and guarantees the best onboarding experience. We offer flexible plans, that grow together with your SMB.

Basic	Essentials	Business	Platinum
Preview package, ideal for businesses that are just getting started and want to get a taste of the vCita solution.	Tailored for **new businesses** to grow and manage their business with a professional feature set.	Core business management and engagement features, designed to support **growing businesses**. *Most popular*	A full-suite solution for **established businesses**. Everything they need to engage, manage and grow their business online.

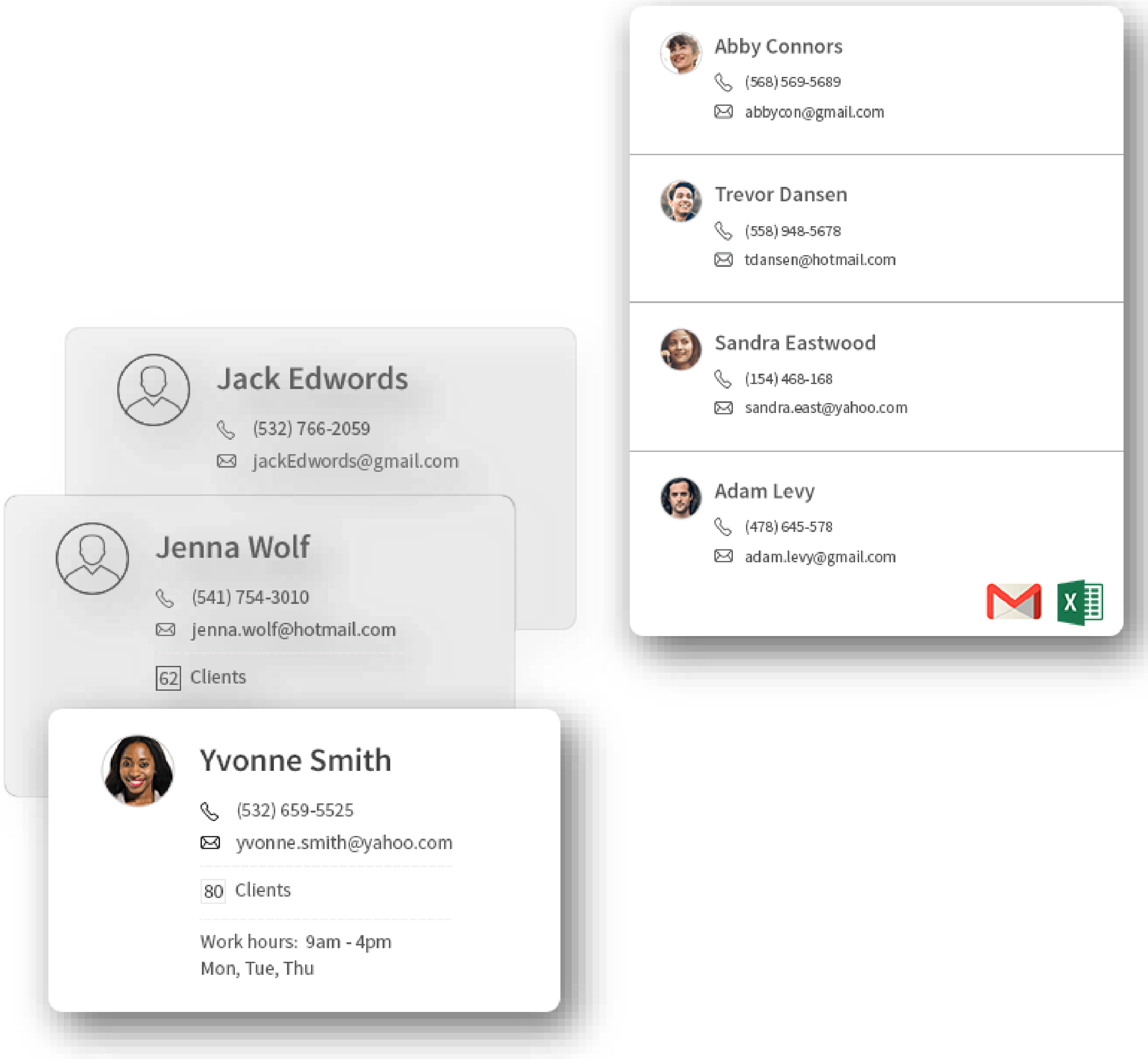
Platform

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Mobile App User-friendly native app for Android and iOS, that allows you to manage your clients, schedule and receive payments on the go.	V	V	V	V
Web Application Responsive and easy-to-use web application, that can be accessed from any mobile phone, tablet or any other device.	V	V	V	V
Desktop Version An easy-to-use desktop application that allows you to manage all of your business-related activities.	V	V	V	V
Cross-Browser Compatibility (Web App) The platform is compatible with all the main web browsers, such as Chrome, IE, Firefox and Safari.	V	V	V	V
General				
Advanced Search Easily find clients, messages, documents, payments and bookings from any place within the system, using the advanced search field.	V	V	V	V
Business Notifications Get notified by the system for each new booking, past or due estimates and invoices or new contact requests!	V	V	V	V
Mobile Push Notifications To Business Receive push notifications to your mobile app for every new booking, payment or contact request and always stay updated!	V	V	V	V
Business Dashboard See a summary of your upcoming meetings and events, open and overdue payments and active clients on a single, main business dashboard.	V	V	V	V
Integrated Onboarding Flow An easy and engaging step-by-step onboarding list, to help set up the features that are most relevant to your business.	V	V	V	V
Branding and Personalization Personalize the look and feel of your client portal, emails and invoices by adding your business logo.	V	V	V	V
Multi-Language Support Change the system interface to your preferred language, with the click of a button! The platform can be easily localized and is already available in nine different languages.	V	V	V	V
Fraud Prevention & Security The system supports customer data encryption and password protection and has built-in spam protection mechanisms, aimed at identifying and preventing suspicious activities from accounts.	V	V	V	V

Client Management

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Client Card Management Manage all of your leads and clients with client cards! View and track client info, payments, bookings, documents and conversations for each client, all from one place!	V	V	V	V
Client Card Customization Customize all of your client cards by deciding which relevant and important information to add to your client profile.	V	V	V	V
Client Communication History Manage and track all of your communication with your clients in a secured environment. Inbox, estimates, invoicing, payments: all of the client related communication in one place for easy access!	V	V	V	V
Lead Source Tracking Track the lead source, campaign or website URL for each of your clients to gain insights into your most effective source channels.	V	V	V	V
Custom Notes Add additional information to your client cards in form of internal notes, keeping all the relevant data in one place.	V	V	V	V
Document Management Per Client Upload and store documents per client and share with them, whenever you like!	V	V	V	V
Export Contacts Easily export your client list to excel or csv format.	V	V	V	V
Import Contacts Easily import contacts into the system, using standard google, csv formats or directly from your phone.	V	V	V	V
Client Profile Enrichment Automatically complete and enrich your client cards with social media info, such as profile picture and social media links.	-	V	V	V
Tagging Capabilities Create and manage personalized tags for your clients to help you easily group, filter and segment them.	-	-	V	V
Number Of Clients	Up to 300	Up to 1000	Up to 5000	Unlimited
Inbox				
Inbox Options All incoming and outgoing conversations are organized in one centralized inbox, to facilitate client communication and interaction.	V	V	V	V
Message Status Manage and track your internal communication with message status, such as read and received. Messages that were opened on the personal email are also displayed as read in the inbox, for maximum transparency.	V	V	V	V

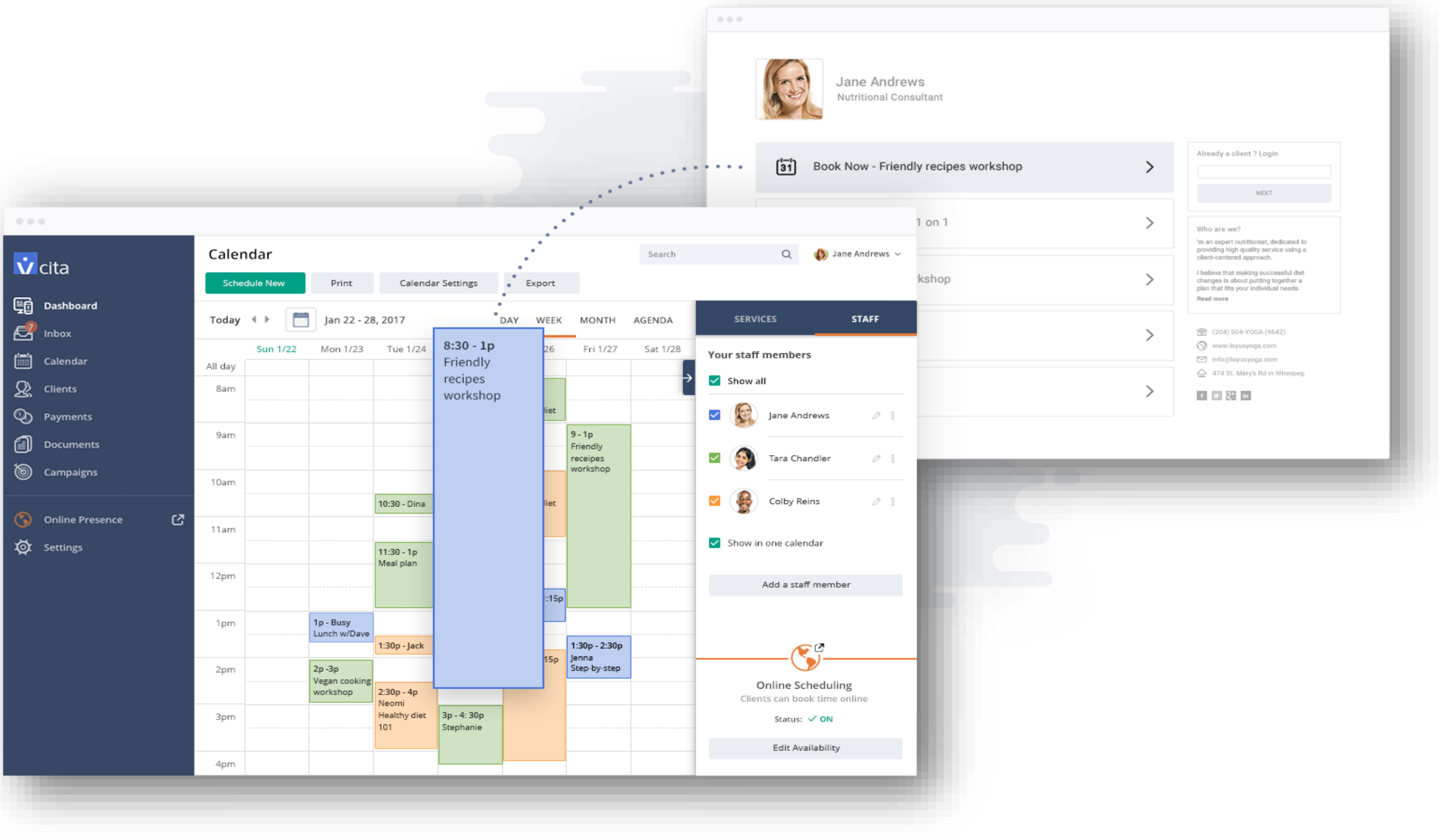
Bulk Message Management Select several messages you would like take the same action on, such as delete, archive or follow-up, for maximum efficiency.	V	V	V	V
Conversation Source Tracking See which lead channels bring you the most business! Track where the highest number of engagements are coming from: website, client portal, campaign or automatic messages. You can even filter your conversations per source in your inbox!	-	V	V	V
Follow-up Reminders Receive automated reminders by marking conversation for follow-up. These will then be saved in a separate follow-up folder until the action is required, after which they will return to the inbox folder.	-	-	V	V



Calendar Management

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Calendar Management Options Manage, track and visualize all of your and your team's appointments and meetings in a customizable calendar view.	V	V	V	V
Calendar Synchronization Options Easily synchronize your calendar with external third-party calendars and manage all of your appointments from one single place.	V	V	V	V
Time Format and Time Zone Configure your calendar to display a preferred time format and time zone.	V	V	V	V
Location Type Options Easily define the location for each meeting or service, such as phone, online or in-person.	V	V	V	V
Service Templates Create and manage an unlimited number of services to offer to your clients, according to your specific business needs.	V	V	V	V
Service Fee Options Service fees can be defined for each service or event, such as free or fixed.	V	V	V	V
Track Appointment Payments Automatically and manually manage all of the payments linked to specific appointments. Offline payments can be registered by marking them as paid or unpaid.	V	V	V	V
Recurring Appointments Create and set-up recurring appointments to automatically repeat every day, week or month.	V	V	V	V
Appointment Report Easily export all of the scheduled appointments and events for a holistic overview.	V	V	V	V
Events and Group Meetings Create events or meetings for a group of leads or clients and easily manage the communication and settings through various configuration options.	V	V	V	V
Event Tracking and Management See all of the clients that signed up to an event, who paid and send a message to the entire group.	V	V	V	V
Track Meetings Keep a full overview over your meetings, by easily marking them as no-shows, whenever necessary.	V	V	V	V
Automatic Reminders Set and configure reminders to be automatically sent to your clients before a meeting or event, to reduce no-shows - by email or SMS.	V	V	V	V

Appointment Confirmation Reduce no-shows, by automatically sending automated appointment confirmation notifications via email or SMS.	V	V	V	V
Personalized Notes Add internal notes to appointments and events to keep all the important information in one place.	V	V	V	V
Printing Options Print your calendar with all of your meetings at your convenience!	V	V	V	V
Staff Calendar Support Ensure alignment and synchronization of the different business staff or team members, through a joint calendar with color-coding options and single calendar or side-by-side view.	-	-	V	V



Online Scheduling

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Custom Business Hours Define, set and display standard business hours in which your clients can book services and appointments or customize the availability per staff member.	-	V	V	V
Date-Specific Availability Define date-specific availabilities outside, or in addition to, standard business hours, giving you the highest level of flexibility with your offering.	-	V	V	V
Online Bookings Create and enable different types of online booking, through website widgets or your client portal and let your clients schedule appointments with you, hassle-free.	-	V	V	V
Time Slot Booking Options Your clients have the option to choose from different available time slot options, for the highest level of flexibility.	-	V	V	V
Customized Service Availability Define the availability for each service you are offering, by specific hours or days of the week, to guarantee the highest level of flexibility that matches your business.	-	V	V	V
Group Event Registration Easily create, publish and manage group events or meetings to which your clients and prospects can sign-up to.	-	V	V	V
Meeting Confirmation Options Save time and efforts by automatically accepting meeting requests from clients or prospects that come through your client portal page or website widgets, or define to manually accept incoming meeting requests.	-	V	V	V
Customized Terms and Conditions Define and customize terms for specific services that require approval before scheduling.	-	V	V	V
Minimum Advanced Booking Define the minimum time a service or appointment can be booked in advance, in order to guarantee enough preparation time and availability.	-	V	V	V
Maximum Advanced Booking Define the maximum future availability for which services or appointments can be booked.	-	V	V	V
Customized Scheduling Forms Easily define custom fields to be filled out during booking, to ensure you receive all the relevant information about your leads, ahead of time.	-	V	V	V
Booking Policies Customize and display booking policies that require approval before scheduling.	-	V	V	V

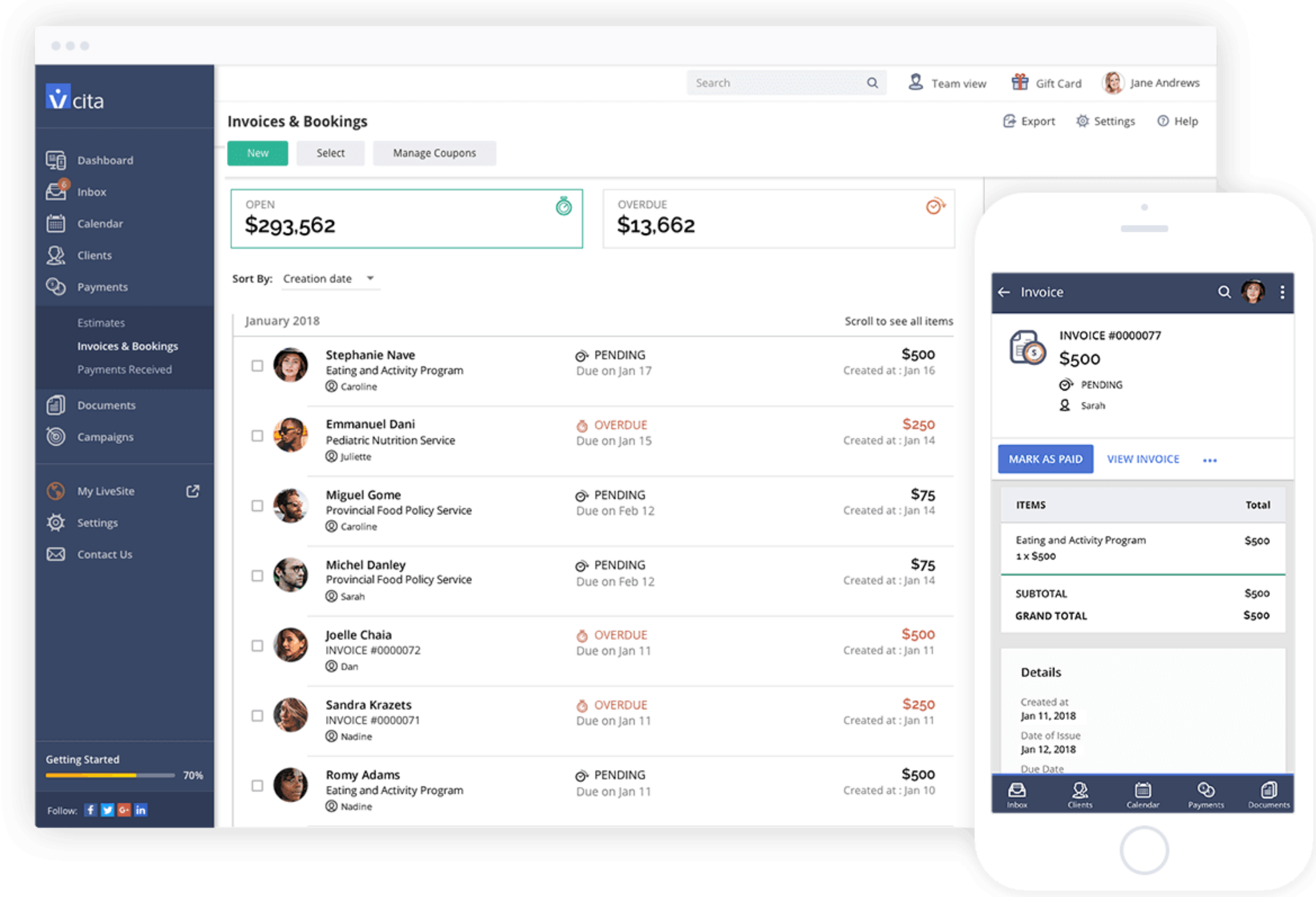
Integrated Phone Conference Solution A fully integrated phone conference service, which allows you to hold and track conference calls through the platform.	-	V	V	V
Service Pricing Options Easily define and customize different pricing options for different services - from free to a fixed price.	-	V	V	V
Flexible Payment Timing Easily define when a service should be paid: when scheduling or after the appointment takes place.	-	V	V	V
Service Categories Create higher-level categories for different services, that can easily be displayed on your client portal or website widget.	-	V	V	V
Cancellation and Rescheduling Policy Easily create and set custom cancellation and rescheduling policies for each service, to avoid last-minute changes or no-shows.	-	V	V	V
Automatic Service Allocation Services can be pre-configured to automatically be assigned to specific staff members, for a specific service.	-	-	V	V
Customizable Notifications Create customizable and personalized notifications for each service that you offer, such as booking confirmation, reminders and post-meeting follow up.	-	-	-	V
Joint Availability Automatically assign a service to an available staff member, for the highest level of flexibility.	-	-	-	V
Auto-Assign Appointment To Staff Member Services can be pre-configured to automatically be assigned to specific staff members for future bookings.	-	-	-	V

Payment Management

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Invoices, Estimates and Receipts				
Branded Invoices Brand your invoices by adding your logo and business info, to match your business or brand identity.	V	V	V	V
Invoice Sending Options Send invoices to your clients by email, SMS or through the client portal and track everything billing-related within the system.	V	V	V	V
Invoice Configuration Easily save invoices as a draft, which can be edited, printed and copied for your convenience.	V	V	V	V

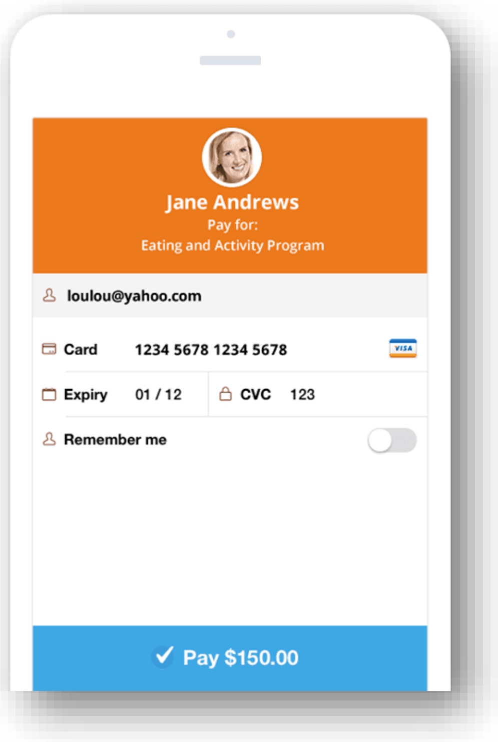
Estimates Options Business owners can send estimates to clients, which can easily be approved or declined, with the click of a button.	V	V	V	V
Estimate to Invoice Conversion Easily convert approved estimates into invoices and avoid repetitive data entry.	V	V	V	V
Invoice Options Add product or service from items list and set discounts or taxes per invoice, for highest flexibility.	V	V	V	V
Terms & Notes Personalized terms & conditions can be set up per estimate or invoice, according to your business needs.	V	V	V	V
Sharing Options Send invoice to your clients only, or to additional recipients in one single click!	V	V	V	V
Printing Options Both you as a business owner, as well as your clients, can print estimates, invoices and payment receipts easily from within the system.	V	V	V	V
Payment Confirmation and Receipt Payment confirmations and receipts will automatically be sent to your clients- keeping them updated at all times.	V	V	V	V
Estimate & Invoice Management Easily filter and sort estimates and invoices by client, status, estimate/invoice number, creation and expiration/due date.	V	V	V	V
Personalized Notes Add internal notes to estimates, invoices and payments to keep all the important information in one place.	V	V	V	V
Late Payment Reminder Never again miss a pending payment from your clients, with the overdue estimate and invoice reminder option. Easily configure when an automatic reminder should be sent out and to whom.	-	-	V	V
Client Billing				
Virtual Terminal Gives you the highest flexibility to quickly process credit card payments and charge clients over the phone or in person.	V	V	V	V
Partial Payments Choose if you want to charge your client in full or receive partial payments for a service or booking.	V	V	V	V
Payments Recording You can record payment manually within the system, when receiving offline payments, such as cash or check.	V	V	V	V
Refund Recording Mark payments, received online or through the virtual terminal, as refunded and keep track of all your payments.	V	V	V	V

Track Payments Per Service Pending payments and all payment statuses can be viewed by services and events – never miss a payment again!	V	V	V	V
Track Payments Per Client See which estimates are about to expire and track all payments and their status, per client.	V	V	V	V
Multiple Currencies Support The platform allows you to request and receive payments for your services in multiple currencies, worldwide.	V	V	V	V
Customize Tax & Discounts Taxes and individual or discounts can easily be configured and added to invoices, per client or groups.	V	V	V	V
Coupon Creation Easily create and customize coupons and apply them to different payment requests to promote your services!	-	-	V	V
Functional Coupons Coupons can be added when generating invoices or can be used by clients when booking online.	-	-	V	V
Coupon Redemption Limitations Limit the redemption of coupons by client, by dates or maximum number of redemptions per coupon.	-	-	V	V
Coupon Limitation Options Coupons can be limited to specific services or staff members, according to your business needs!	-	-	V	V



Online Payments

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Online Payment Options Accept different online payment options for your services, such as credit-card, Stripe and PayPal, without additional fees from us!	-	V	V	V
Mobile and Web Payment Options Invoices can easily be paid through the desktop or mobile application, guaranteeing the highest level of flexibility for you and your clients.	-	V	V	V
Request Payment Send a link to your client to request a payment and track everything within the system.	-	V	V	V
Unrequested Payment Option Clients can send unrequested payments through a free-form on the client portal, without an explicit payment request from the business.	-	V	V	V
Customize Payment Timing Give clients the option to pay services directly when booking.	-	V	V	V
Custom Terms and Conditions Payment policies, terms and conditions can easily be shown before a client or prospect makes an online payment.	-	V	V	V
Customize Payment Form (Client Card) Fields within the payment forms can be easily configured and saved as part of the client card.	-	V	V	V



Team Management

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Multiple Staff Member Support Add and manage different staff members within the system and assign different roles and permissions to each.	-	-	V	V
Staff Account Each team member receives their own account with access to their own appointments, messages and clients.	-	-	V	V
Admin Staff View Stay on top of your team's activities: view dashboard, clients, appointments and payments for all of your staff or filter per specific team members.	-	-	V	V
Staff Member Management Ensure the highest level of flexibility by configuring the availability and calendar synchronization per staff member.	-	-	V	V
Staff Assignment Easily manage your staff, by assigning any engagement, such as appointments and clients to different staff members.	-	-	V	V
System Notifications for Staff As the business owner you can create a personalized experience for your team members, with customized emails that get sent from the system.	-	-	V	V
Notifications Configuration Per Staff Every staff member can define if to receive push notifications or SMS notifications from the system on any new lead.	-	-	V	V
Personalized Business Signatures Email signatures can be configured and personalized for each of the staff members.	-	-	V	V
Team Calendar View View staff availability, bookings and agendas in a team calendar, with designated color-codes per member.	-	-	V	V
Personalized Staff Display Options Let your clients know who your staff is when booking appointments, by displaying staff photos, professional titles and levels of expertise.	-	-	V	V
Staff Tracking Have full control over your business activities, by seeing which team members sent estimates, invoices or accepted payments.	-	-	V	V
Availability Configuration Options Define and configure availability of staff members and set automatic service assignments.	-	-	-	V
Assignment Rules	-	-	-	V

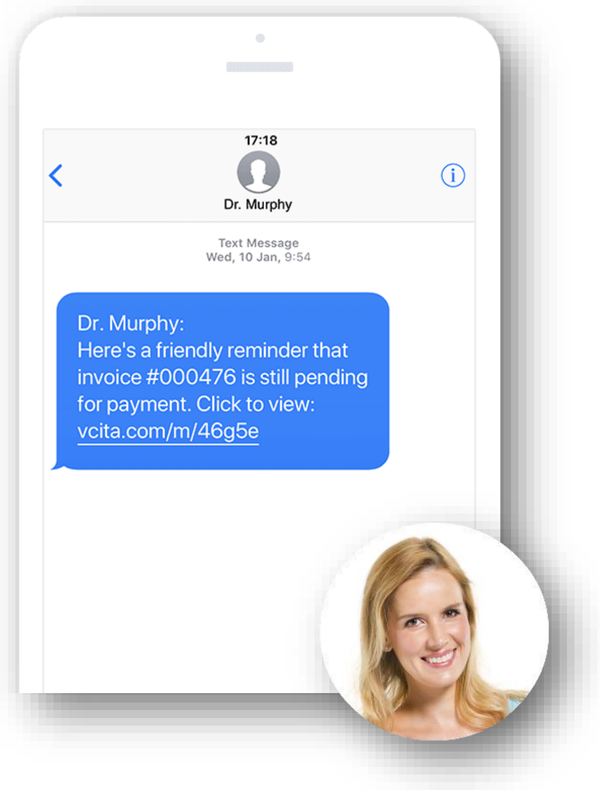
Select a default staff member to automatically receive new incoming client requests from the website widgets or client portal.				
Roles and Permissions Configure and define roles and permissions for each of your staff members, according to your specific business needs.	-	-	-	V
User Impersonation As a business owner and admin you can have full transparency over your business, by being able to impersonate your staff.	-	-	-	V

Documents

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
File Storage Upload, store and manage documents you need for your business: for internal use or to be shared with your clients.	20 MB	20 MB	20 GB	20 GB
File Sharing Easily share and track relevant and important documents with individuals or a group of clients.	V	V	V	V
Customized Document Links Create direct links to popular documents, that can be easily shared and reused to drive engagement.	V	V	V	V
Track File Downloads Easily see when a client downloads documents that have been shared with them.	V	V	V	V
Request Documents Request documents through email or SMS and let your clients share them with you digitally, through the platform.	V	V	V	V
Virus Scanning Received and shared documents are automatically scanned for viruses by the system.	V	V	V	V

Auto Client Messages and Reminders

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Customized Messages Easily customize any outgoing, automated messages to fit your business, such as thank you messages, reminders, contact requests, scheduling and payment confirmation.	V	V	V	V
Customized Message Signature Business signatures can be customized to fit your business and personalized per staff member.	V	V	V	V
SMS Notifications and Reminders Reduce no-shows and drive engagement with automated SMS notifications and reminders, that can be sent in addition to emails.	-	-	V	V
Configure Automatic Emails Define how you want to interact with your clients and easily configure automatic email functionality, to be turned on or off.	-	-	V	V
Customized Email Template Customize email templates to ensure the highest level of efficiency, such as reminders and booking confirmations.	-	-	V	V
Customized Email Template Per Staff Each email template can be personalized per staff member.	-	-	-	V
Follow-Up Messages Personalize automatic follow-up messages to be sent after a meeting or service has taken place.	-	-	-	V
Notifications Per Service Personalize notifications by service, such as thank you messages, confirmations, reminders and follow-ups.	-	-	-	V



Campaigns

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Multi-Channel Campaigns Easily create, send and track action-driven and targeted campaigns to promote your services, special event and promotions – by email and SMS!	-	-	V	V
Actionable Campaigns Engage your clients and convert your prospects, by sending call-to-action campaigns, inviting them to schedule a meeting, visit your client portal, pay or share a document.	-	-	V	V
Mobile Adaptive Campaigns Campaigns are automatically displayed in the most optimized way and look great on any device!	-	-	V	V
Customized Campaigns Edit the text body, title, subject line and use campaign parameters to build personalized campaigns. In-built tips guide novice users through the process and help them get started easily!	-	-	V	V
Client Parameter Personalization Make the most out of your marketing campaigns with automated and personalized client parameters, such as name and last name.	-	-	V	V
Image Gallery Use free professional photos from the photo gallery or upload your own, to customize your campaign visual.	-	-	V	V
Add Coupons Drive engagement and increase your bookings, by easily inserting coupons to a campaign.	-	-	V	V
Draft and Test Campaigns Create, edit and duplicate campaigns in draft mode! Send yourself test campaigns to do a last review before sending out the final version to your client base.	-	-	V	V
Tracking and Reporting Get full insights into your campaign performance and see how many of your clients received, viewed, clicked or engaged with the email or SMS campaign and easily export these results into .xlsx or .csv files.	-	-	V	V
Schedule Campaigns Send campaigns right away or prepare everything in advance and schedule the campaign to be sent at a future date and time.	-	-	V	V
Track Engagement Source See which of your campaigns are driving the most engagement and replicate the success!	-	-	V	V
Opt-in Email and Text Messaging Allow clients to opt-in, through contact forms, update manually in the client card and send campaigns to opt-in clients only.	-	-	V	V

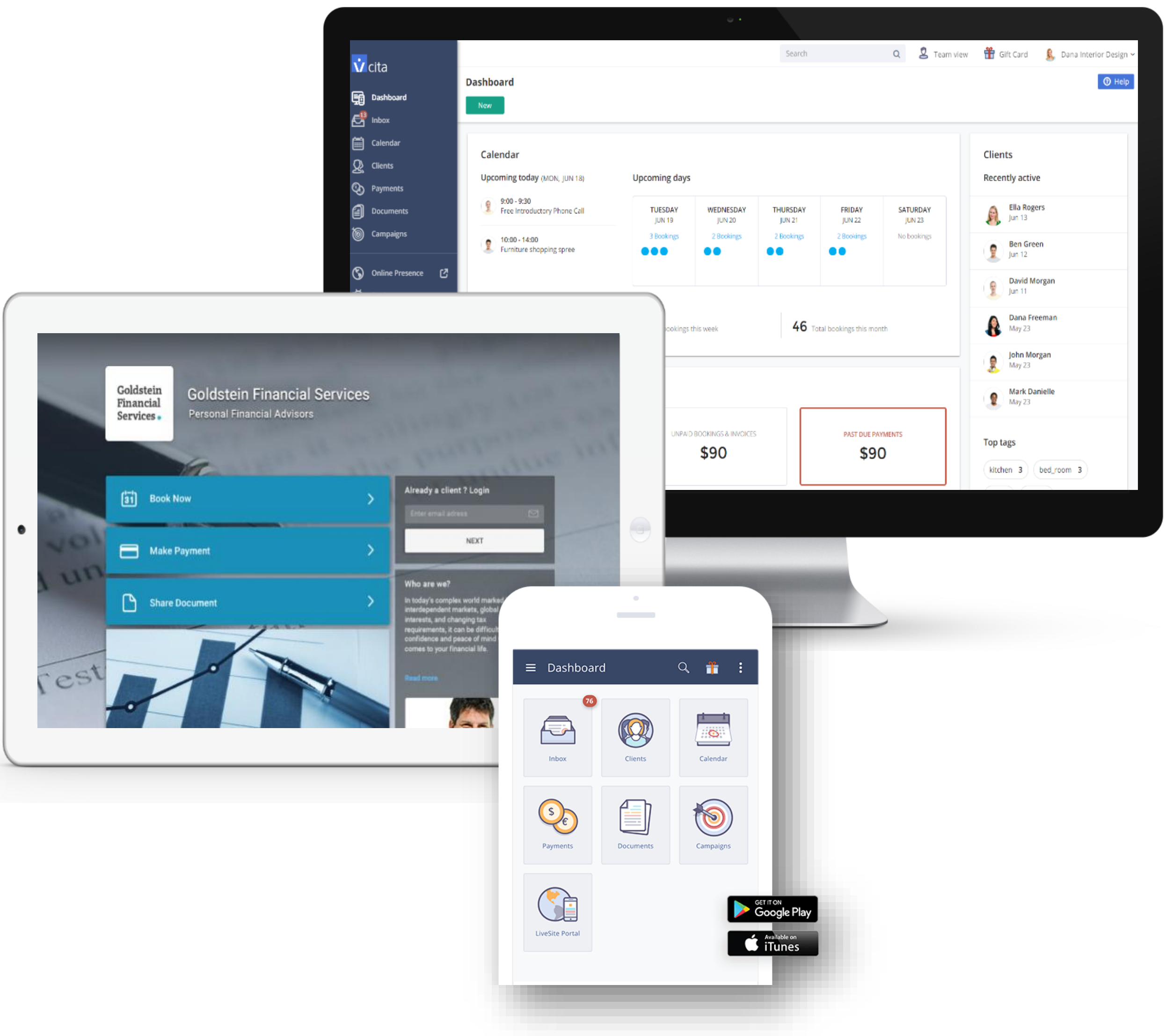
Opt-out Option Clients have the option to unsubscribe from campaign emails and can send 'stop' to cancel SMS subscription.	-	-	V	V

Client Portal and Widgets

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Client Portal Site Have a dedicated client portal where your clients and prospects can easily book your services, schedule appointments, receive important information about your business and more!	V	V	V	V
Website Widgets Engage your website visitors and capture new leads by easily adding personalized contact forms, scheduling calendars (iframe) and sidebar widgets to your website.	V	V	V	V
Call-to-Action Direct Links Create and send personalized and direct URL links to your client portal, requesting a call-to-action such as: make payments, share document, schedule appointment or send message.	V	V	V	V
Call-To-Action For Multiple Clients Send a call-to-action link to an individual or a group of clients per email.	V	V	V	V
Customized Widget Brand the add-on widgets to your match your business and brand identity by customizing the colors, text and access SDK.	V	V	V	V
Client Login Returning clients to get a more personalized experience and will be able to change, re-book or cancel upcoming appointments independently.	V	V	V	V
Personalization Options Easily adapt images, colors, action buttons and text you would like displayed on your client portal, to match your business and brand identity. You can even personalize the domain address in the blink of an eye!	V	V	V	V

Business API & Integrations

	BASIC	ESSENTIALS	BUSINESS	PLATINUM
Zapier Integration Easily integrate with your favorite apps such as Facebook Lead Ads, Slack, Quickbooks, Google Sheets, Google Docs through your Zapier account.	-	-	V	V
Google Analytics and Conversion Easily connect your vCita account with Google Analytics and conversion, to gain a complete overview.	-	-	V	V
Quickbooks Easily integrate the vCita platform to your Quickbooks account.	-	-	V	V
Full API Access vCita APIs allow easy and advanced integration options with external platforms that suit your business needs.	-	-	-	V



Partners Management Features

Partner Dashboard Easily create, setup, clone and customize client accounts – all from one single dashboard!
Verticalization Offer a tailored user experience with a personalized platform that suits specific business industries, with predefined templates by verticals.
Roles and Permissions Management Create different hierarchy levels by creating and managing different operators, with different roles and permissions for users within the system.
Account Creation and Manipulation API Automatically create accounts in vCita through a third-party platform, with all relevant business info per account.
Lead Injection API Easily inject all of the relevant client information to vCita from existing lead sources, such as 3rd party apps or online forms.
Reporting API Receive a detailed overview, over user numbers and end clients. Reporting API allows directory admins to query about activity of their clients' accounts in vCita.
Customization Options Easily customize website widget colors, text and icons, through the SDK access, to match your business or brand identity.
Duda Website Connection Inject all of Duda contact form information into the vCita platform.
White Label Knowledgebase A complete set of white labeled support materials in our Knowledge base that can be used with your SMB clients.
Custom Templates Build and manage different account templates for easier and faster account creation and efficient management.
Add "Powered By" Add "Powered by" your brand, to be displayed in various places, such as website widget, client portal or system emails.
Custom Packages Build and tailor your own packages and define which features, quota and service limitations are available in each.

Upcoming Features

Google Reserve
Duda Native Integration
Facebook Add On