



# JOHNNYAUTOMATION

METRICS. AUTOMATION. DASHBOARDS. EFFICIENCY

## Software Checklist

Customer Management System (CRM)

Phone System

SMS Ability (User Interface)

Credit Card Merchant Services

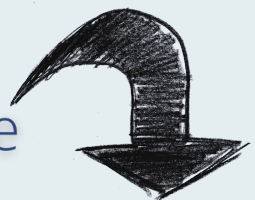
Customer Service (Support Tickets)

Meeting Scheduler

Cloud Database

Enterprise Resource Planning (ERP)

Continue





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## Select your current CRM

Salesforce

Zoho

Hubspot

Keap (Infusionsoft)

Active Campaign

Pipedrive

Other: \_\_\_\_\_

N/A

Is your CRM's data joined with any of your other software?

Yes

No

Continue





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## Select your current Phone System/Telephony

RingCentral

8x8

Zoom

Dialpad

Vonage

Twilio

AWS Connect

Other: \_\_\_\_\_

Is your Phone System data joined with any of your other software?

Yes

No

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## Select your current SMS/MMS solution? (Text Messaging)

Twilio

FixYourFunnel

TeleSign

MessageBird

SalesMessage

Google Voice

Other: \_\_\_\_\_

N/A

Is your SMS/MMS data joined with any of your other software?

Yes

No

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## Select your current Credit Card Merchant?

- QuickBooks Online
- QuickBooks Desktop
- PayPal Business
- Stripe
- Wepay
- Square
- Other: \_\_\_\_\_
- N/A

Is your Billing System joined with any of your other software?

Yes

No

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## Select your current Meeting Scheduling System?

Calendly

ScheduleOnce

Acuity Scheduling

SimplyBook.me

Google Calendar

Outlook Calendar

Other: \_\_\_\_\_

N/A

Is your Scheduling System joined with any of your other software?

Yes

No

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## Select your current Cloud Database?

Amazon Web Services (AWS)

Cloud SQL by Google

Oracle

SAP

EnterpriseDB

Garantia Data

Other: \_\_\_\_\_

N/A

What systems' data do you have stored in your existing cloud?

\_\_\_\_\_

N/A

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## Select your current ERP system?

Amazon Web Services (AWS)

Oracle

Microsoft Dynamics 365

SAP

Epicor ERP

Sage Intacct

Other: \_\_\_\_\_

N/A

What systems' data do you have connected with your ERP?

\_\_\_\_\_

N/A