Sage CRM

Editions comparison guide

sage

Functionality	Essentials	Professional	On-Premise
Base Functionality			
Contact Management - Companies, People, Address, Phone, E-mail	✓	✓	✓
Calendar Management	✓	✓	✓
Social media integration (Facebook, Twitter, LinkedIn)	✓	✓	✓
Business Collaboration powered by Yammer	✓	✓	✓
Interactive Dashboard	✓	✓	✓
Cross-browser compatibility	✓	✓	✓
Reporting	✓	✓	✓
Exchange Integration			✓
Microsoft Outlook Lite	✓	✓	✓
Classic Microsoft Outlook plugin		✓	✓
Document Management	✓	✓	✓
Export reports and lists to PDF	✓	✓	✓
Export reports and lists to CSV	✓	✓	✓
Group Management - mass tasks, document mail merge, group email, export	✓	✓	✓
Logical Search	✓	✓	✓
Multi-currency enabled	✓	✓	✓
Keyword Search	✓	✓	✓
Mobile CRM			
Optmised Mobile UI	✓	✓	✓
Sage CRM for iPhone		✓	✓
Sage CRM for Android*			✓
Sales Tracker for Windows 8	✓	✓	✓
Sales Force Management			
Business Accelerators for Sales			✓
Alerts and notifications			✓
Sales Management Dashboards			✓
Sales Opportunities	✓	✓	✓
Opportunity Pipeline Management	✓	✓	✓
Opportunity Tracking	✓	✓	✓
Sales Forecast Management	✓	✓	✓
Quotes and Orders Management	✓	✓	✓
Product Management	✓	✓	✓
Lead to Opportunity Conversion	✓	✓	✓
Web-to-Lead	✓	✓	✓
Marketing Management			
Campaign Management		✓	✓
MailChimp email Marketing			✓
Swiftpage email Marketing			✓
Campaign Group Actions - email, outbound call list, export to CSV, mail merge		✓	✓
Outbound Call Management		✓	✓
Integrations			
Real-Time SData feeds	✓	✓	✓
ERP Integration			✓

*The Sage CRM for Android app will be available in Spring 2015

Functionality	Essentials	Professional	On-Premise
Customer Service Management			
Case Management		✓	✓
Knowledgebase/Solution Management		✓	✓
Web Self-Service			✓
CTI capabilities			✓
User Management			
User Administration	✓	✓	✓
Personal User Preferences	✓	✓	✓
My CRM to manage my information	✓	✓	✓
Team CRM to manage my teams' information	✓	✓	✓
Preloaded themes to change the look and feel of the UI			✓
Ability to make custom themes			✓
Security			
Field Level Security to control data access	✓	✓	✓
Territory Management		✓	✓
Role-based security		✓	✓
Add, move, edit, merge, and rebalance territories		✓	✓
Set up security profiles and security policies		✓	✓
Add, move, edit, merge and rebalance territories		✓	✓
Set up password policies			✓
Customisation Capabilities			
Sage CRM Builder		✓	
View Management		✓	✓
Notifications	✓	✓	✓
Component Manager			✓
Caption Translation to customize screens	✓	✓	✓
Field Management - add/edit/delete fields	✓	✓	✓
Screen Management - edit screens	✓	✓	✓
Screen Management - add/delete screens			✓
List Management - edit lists	✓	✓	✓
List Management - add/delete lists			✓
Field level - Create/Validate Scripts			✓
Field level - Custom content/OnChange Scripts	✓	✓	✓
Table Level Scripts			✓
Reports - add/edit/delete reports	✓	✓	✓
Classic Dashboard Management (*Upgrade only)		✓*	✓
Advanced Customizations			
Blocks, Tables, Tabs customization			✓
Escalation rules (*Pre-configured only)	✓	✓	✓
Edit Escalation rules (*Pre-configured only)		✓	✓
Workflow/Workflow Management		✓	✓
Create Escalation rules outside of workflow			✓
Workflow Preview			✓
Add Server Side actions in workflows			✓
Add Client Side actions to workflows		✓	✓
Key Attributes (*Upgrade only)		✓*	✓
Button Groups			✓
Tables and Databases			✓

Functionality	Essentials	Professional	On-Premise
Mobile CRM			
Optimized Mobile Theme for iPhone, Android and tablet	✓	✓	✓
Sage CRM for iPhone		✓	✓
Sage CRM for Android			✓
Sales Tracker for Windows 8	✓	✓	✓
Developer Interfaces			
SOAP web services API		✓	✓
COM API			✓
SData API		✓	✓
.NET API			✓
Client-side API (*available for Business Partners in the Cloud)	✓*	✓*	✓
Data Management			
Data upload from CSV	✓	✓	✓
Product List Management	✓	✓	✓
Deduplication	✓	✓	✓
Database export	✓	✓	✓
Manage Relationship Types		✓	✓
Key Attribute data		✓	✓
Data Upload from Excel	✓	✓	✓
Match Rules (*pre-configured)	✓*	✓	✓
Company Name Clean-up (*pre-configured)	✓*	✓	✓
Currency Configuration	✓	✓	✓
Forecast Management	✓	✓	✓
Email & Documents			
Configure the system to file inbound e-mails according to a set of predefined rules			✓
Spellchecking	✓	✓	✓
Library Management	✓	✓	✓
Advanced Email Management			✓
System			
Logging			✓
System Upgrade	✓	✓	✓
Database Access			✓
Metadata	✓	✓	✓
System Behavior	✓	✓	✓
Locks			✓
Timings		✓	✓
Lock System	✓	✓	✓
License Key Details	✓	✓	✓
Proxy Settings			✓
Cloud Storage			
Storage (Library and Database Combines)	2 GB	5 GB	n/a
Mass E-mail (daily limit on number of e-mails)	10,000	10,000	n/a
Maximum size of e-mail attachments	20 MB	20 MB	n/a
Data Upload (size of .XLSX files)	10,000 rows	10,000 rows	n/a
Data Download / Backup (Library and Database)	1 download per month	1 download per month	n/a

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

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