

Editions comparison guide

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			
Optimised 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	✓	✓	✓
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		✓	✓
Customisation Capabilities			
Sage CRM Builder		✓	
Screen/List Management	✓	✓	✓
Field & Caption Management	✓	✓	✓
View Management		✓	✓
Notifications	✓	✓	✓
Component Manager			✓
Advanced Customisations			
Blocks, Tables, Tabs customisation	✓	✓	✓
Escalation rules (Pre-configured only)	✓	✓	✓
Edit Escalation rules (Pre-configured only)		✓	✓
Workflow/Workflow Management		✓	✓
Developer Interfaces			
SOAP web services API		✓	✓
COM API			✓
SData API		✓	✓
.NET API			✓
Client side API	✓	✓	✓
Data Management			
Data upload from CSV	✓	✓	✓
Product List Management	✓	✓	✓
De-duplication	✓	✓	✓
Database export	✓	✓	✓
Manage Relationship Types		✓	✓
Key Attribute data		✓	✓
Email & Documents			
Spellchecking	✓	✓	✓
Library Management	✓	✓	✓
Advanced Email Management			✓