

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	✓	✓	✓
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	✓	✓	✓

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
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

Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. We are reimagining the business of doing business and bring energy, experience and technology to inspire our customers to fulfill their dreams. We work with a thriving community of entrepreneurs, business owners, accountants, partners, developers and 3rd party service providers who drive the global economy. From social accounting apps to enterprise-class software, millions of businesses use Sage to transform the way they work. We are a FTSE 100 company with 13,000 employees in 23 countries. For more information, visit www.sage.com