

# SageCRM

## Feature Comparison Chart for SageCRM v6.2 On-Premise vs. On-Demand

Features & Functionality	SageCRM (On-Premise)		SageCRM.com (On-Demand)
	100	200	
<b>Address Linking</b> (management interface to link existing company addresses to new or existing persons)*	✓	✓	✓
<b>Advanced Find</b>	✓	✓	✓
<b>Branding Toolkit*</b>	✓	✓	—
<b>Call Center Automation</b>	✓	✓	✓
<b>CTI Server</b>	—	✓	—
<b>Calendar Day View</b> (side-by-side display of overlapping appointments)	✓	✓	✓
<b>Coaching</b> (on-screen user coaching)	✓	✓	✓
<b>Create Custom Button Groups</b> (user security applies to buttons in group) (EIS)	●	✓	—
<b>Crystal Reports® Server</b> (10 or XI; requires separate purchase)*	✓	✓	—
<b>DataUpload Option</b> (Map selection field values to code values in database)	✓	✓	✓
<b>Database Options</b> (MS SQL, Oracle, DB2)	*	*	—
<b>E-mail Advanced Management Server Options</b>	✓	✓	—
<b>E-mail Editor</b> (rich text formatting & spell check)*	✓	✓	✓
<b>Field Deletion via GUI</b>	✓	✓	✓
<b>Field Level Security</b>	✓	✓	✓
<b>Keyword Search</b> (service on server)	✓	✓	—
<b>Maximum Named Users</b>	30	Unlimited	Unlimited
<b>Marketing Automation:</b>	✓	✓	✓
Mass E-mails & Mass E-mail Status	✓	✓	✓
Groups (dynamic & static)	✓	✓	✓
Outbound call handling (static scripts for telemarketing)	✓	✓	✓
<b>Microsoft Outlook Integration</b> (2003 and 2007 only)	✓	✓	✓
Appointment Handling (advanced multi-meeting appointment handling)	✓	✓	✓
Mass file e-mails for one contact	✓	✓	✓
Add shared document from within an e-mail	✓	✓	✓
Send and file e-mail in Outlook (button)	✓	✓	✓
Office 2007 Support (Outlook, Word, Excel)	✓	✓	✓
Updated install routine (wizard-driven plug-in)	✓	✓	✓
Option to show CRM menu buttons within Outlook	✓	✓	✓
File & View button to view filed e-mails immediately after filing	✓	✓	✓
Set synchronization deletion notifications if over certain amount of deletions	✓	✓	✓
Set rule-sets for managing synchronization conflicts	✓	✓	✓
Set synchronization direction (One way sync: O -> C or C -> O)	✓	✓	✓
Meeting organizer now displays on meeting screen	✓	✓	✓
<b>Multi-Server SageCRM</b>	*	*	—
<b>Quick Start Tab</b> (My CRM   Quick Start Tab)	✓	✓	✓
<b>Related Entities*</b>	✓	✓	✓

### LEGEND

✓ = Included      — = Excluded      \* = Available upon request      ● = Optional for an additional fee—please see the price list for current pricing  
 EIS = Integration Server, Enterprise Integration Server, Block Server      \*SageCRM v6.2 new features      \*\*DPP=Development Partner Program Members only

Features & Functionality	SageCRM (On-Premise)		SageCRM.com (On-Demand)
	100	200	
<b>Sales Force Automation</b>	✓	✓	✓
<b>Solo Server and SOLO Users</b> (Windows Vista® Support for SOLO*)	●	●	●
<b>Territory Enhancement</b>	✓	✓	✓
Rebalance to add new territories structure	✓	✓	✓
Merge Territories	✓	✓	✓
Move Territories	✓	✓	✓
<b>Web Self-Service</b>	—	●	—
<b>Web to Lead</b> (Administration   Customization   Lead   Web to Lead Tab)	✓	✓	✓
<b>Windows Vista 2007</b> (Client only. Server cannot be installed.)	✓	✓	✓
<b>Wireless Mobile/PDA Access</b>	—	✓	✓
<b>Workflow Action – Custom File Name</b> (Administration   Advanced Customization   Workflow) (Ability to run an ASP page from an action within a workflow rule)	✓	✓	✓
<b>6P bit Windows OS Support for installation</b>	✓	✓	—
<b>Integration Features</b>			
<b>Sage Accpac ERP Hosted Integration</b> (separate instance from SageCRM.com)	—	—	●
<b>Sage Accpac ERP On-Premise Integration</b>	*	*	—
<b>Sage MAS 90/200 Integration</b>	—	*	—
<b>Sage Pro ERP Integration</b>	*	*	—
<b>Enterprise Integration Server (EIS/block server) Functionality</b>			
Tables & Databases (advanced customization)	●	✓	—
Table Level Scripts	●	✓	—
Workflow – Preview Button (Go to Administration   Advanced Customization   Workflow) (Use preview to see the workflow code and build custom component.)	●	✓	—
<b>Field Level Script – Create</b>	✓	✓	—
<b>Field Level Script – On Change</b>	✓	✓	✓
<b>Field Level Script – Validate</b>	✓	✓	—
<b>Quotes and Orders (Primary Entities now):</b>			
Search On	✓	✓	✓
Keyword Searchable	✓	✓	✓
Main Menu - New Button	✓	✓	✓
Line Item Details:			
Add free text item to an order that is not in a price list	✓	✓	✓
Add multiple comments	✓	✓	✓
Groups Functionality	✓	✓	✓
Schema Change – Separate Tables:	✓	✓	✓
Quotes	✓	✓	✓
Orders	✓	✓	✓
Schema Change – New Tables:	✓	✓	✓
Quoteltems (Supporting line item tables)	✓	✓	✓
OrderItems (Supporting line item tables)	✓	✓	✓
<b>Solutions Synchronize to Solo Client</b>	✓	✓	✓

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Features & Functionality	SageCRM (On-Premise)		SageCRM.com (On-Demand)
	100	200	
<b>Administration Functionality &amp; Customization Capabilities</b>			
<b>APIs Available</b>			
Web Services API (.Net using XML)	✓	✓	✓
COM API (ASP Pages) (EIS)	●	✓	—
Net API** (Administration   Customization   <Entity>   Tab   Action – DotNetDLL)	●(DPP)	✓(DPP)	—(DPP)
<b>Blocks   New Button (EIS)</b>	●	✓	—
<b>Component Manager (Administration   Customization   Component Manager)</b>			
Component Detailed Description Field*	●	✓	—
Component Details Tab – New Button (EIS)	●	✓	✓
Component Details Tab – Preview Script Button (EIS)	●	✓	—
Component Details Tab – Script Component Button (EIS)	●	✓	—
Component Details Tab – Set to be Current Component Button (EIS)	●	✓	—
Component Details Tab – Stop Recording Button (EIS)	●	✓	—
Component Preview (during install process)*	●	✓	—
Component Recording Banner*	●	✓	—
Components Tab – Browse/Upload New Component	✓	✓	—
Components Tab – Install Component (that is Uploaded)	✓	✓	—
Overwrite Changes (to previously installed component)*	●	✓	—
Workflow – Preview Button (Administration   Advanced Customization   Workflow) (Use preview to see the Workflow code and build custom component) (EIS)	●	✓	—
<b>Custom Content on Screens</b>	✓	✓	✓
<b>Lists   New Button (EIS)</b>	●	✓	—
<b>Screens   New Button (EIS)</b>	●	✓	—
<b>Tab   SQL (Code) Field on Tab Properties</b>	✓	✓	—(Disabled)
<b>Tab (Adding new “system action” or “EIS actions”)</b>			
Tab   Action – customfile (ASP pages) (EIS)	●	✓	—
Tab   Action – customurl (Linking to an external site) (EIS)	●	✓	—
Tab   Action – runblock (Running custom blocks) (EIS)	●	✓	—
Tab   Action – runtabgroup (Running custom block) (EIS)	●	✓	—
Admin   Users   User Configuration	✓	✓	—
Admin   System   Self Service	—	●	—
Admin   System   Database	✓	✓	—
Admin   System   Locks	✓	✓	—
Admin   Advanced Customization   System Menus	✓	✓	✓
Admin   Customization   <Entity>   Fields   New Button	✓	✓	✓
Admin   Customization   <Entity>   Tabs   New Button	✓	✓	✓
Admin   Customization   <Entity>   Views   New Button	✓	✓	✓
<b>Table Scripts (EIS)</b>	●	✓	—
<b>Windows Vista OS Support for Demo Machines (Business and Ultimate only)*</b>	✓	✓	✓

Note: The information contained in this feature chart is based on SageCRM v6.2.

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#### About SageCRM

Award-winning SageCRM delivers full suite CRM (comprising sales, marketing, and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organizations globally. SageCRM equips sales, marketing, and customer service teams with the tools they need to find new customers, close sales faster, and build lasting, more profitable relationships across all channels. Thanks to its ERP integration capabilities, the SageCRM front office is powered by data from the back office to give sales, marketing, customer service and other front office staff a true 360 degree view of customers across front and back office functions, differentiating it from many other CRM solutions in the market today.

