



Feature Comparison Chart for SageCRM v6.1 On-Premise vs. On-Demand

Features & Functionality	SageCRM (On-Premise)		SageCRM.com (On-Demand)
	100	200	
Advanced Find	✓	✓	✓
Appointment Handling (advanced multi-meeting appointment handling)*	✓	✓	✓
Call Center Automation	✓	✓	✓
CTI Server	—	✓	—
Calendar Day View (side-by-side display of overlapping appointments)*	✓	✓	✓
Coaching (on-screen user coaching)	✓	✓	✓
Create Custom Button Groups (user security applies to buttons in group)* (EIS)	●	✓	—
DataUpload Option (Map selection field values to code values in database)	✓	✓	✓
Database Options (MS SQL, Oracle, DB2)	*	*	—
E-mail Advanced Management Server Options	✓	✓	—
Field Deletion via GUI*	✓	✓	✓
Field Level Security	✓	✓	✓
Keyword Search (service on server)	✓	✓	—
Maximum Named Users	30	Unlimited	Unlimited
Microsoft Outlook Integration	✓	✓	✓
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*	✓	✓	✓
Marketing Automation:	✓	✓	✓
Mass e-mails	✓	✓	✓
Groups (dynamic & static)	✓	✓	✓
Outbound call handling (static scripts for telemarketing)	✓	✓	✓
Multi-Server SageCRM	*	*	—
Quick Start Tab (My CRM Quick Start Tab)	✓	✓	✓

LEGEND

✓ = Included — = Excluded * = Free upon Request ● = Optional for an additional fee—please see the price list for current pricing
 EIS = Integration Server, Enterprise Integration Server, Block Server *SageCRM v6.1 new features **DPP=Development Partner Program Members only

Features & Functionality	SageCRM (On-Premise)		SageCRM.com (On-Demand)
	100	200	
Sales Force Automation	✓	✓	✓
Solo Server and SOLO Users	●	●	●
Territory Enhancement	✓	✓	✓
Rebalance to add new territories structure	✓	✓	✓
Merge Territories	✓	✓	✓
Move Territories	✓	✓	✓
Windows Vista 2007 (Client only. Server cannot be installed.)*	✓	✓	✓
Web Self-Service	—	●	—
Web to Lead (Administration Customization Lead Web to Lead Tab)	✓	✓	✓
Wireless Mobile/PDA Access	—	✓	✓
Workflow Action – Custom File Name (Administration Advanced Customization Workflow) (Ability to run an ASP page from an action within a workflow rule)	✓	✓	✓
64 bit Windows OS Support for installation*	✓	✓	—
Integration Features			
Sage Accpac ERP On-Premise Integration	*	*	—
Sage Pro ERP Integration	*	*	—
Sage MAS 90/200 Integration	—	*	—
Enterprise Integration Server (EIS/block server) Functionality			
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.)	●	✓	—
Field Level Script – Create	✓	✓	—
Field Level Script – On Change	✓	✓	✓
Field Level Script – Validate	✓	✓	—
Quotes and Orders (Primary Entities now):*			
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)*	✓	✓	✓
Solutions Synchronize to Solo Client*	✓	✓	✓

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Features & Functionality	SageCRM (On-Premise)		SageCRM.com (On-Demand)
	100	200	
Administration Functionality & Customization Capabilities			
APIs Available			
Web Services API (.Net using XML)	✓	✓	✓
COM API (ASP Pages) (EIS)	●	✓	—
Net API** (Administration Customization <Entity> Tab Action – DotNetDLL)	●(DPP)	✓(DPP)	—(DPP)
Blocks New Button (EIS)	●	✓	—
Component Manager (Administration Customization Component Manager)	✓	✓	—
Components Tab – Browse/Upload New Component	✓	✓	—
Components Tab – Install Component (that is Uploaded)	✓	✓	—
Component Details Tab – New Button (EIS)	●	✓	✓
Component Details Tab – Script Component Button (EIS)	●	✓	—
Component Details Tab – Preview Script Button (EIS)	●	✓	—
Component Details Tab – Set to be Current Component Button (EIS)	●	✓	—
Component Details Tab – Stop Recording Button (EIS)	●	✓	—
Workflow – Preview Button (Administration Advanced Customization Workflow) (Use preview to see the Workflow code and build custom component) (EIS)	●	✓	—
Custom Content on Screens	✓	✓	✓
Lists New Button (EIS)	●	✓	—
Screens New Button (EIS)	●	✓	—
Table Scripts (EIS)	●	✓	—
Tab SQL (Code) Field on Tab Properties	✓	✓	—(Disabled)
Tab (Adding new “system action” or “EIS actions”)	●	✓	—
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	✓	✓	✓

Note: The information contained in this feature chart is based on SageCRM v6.1 and SageCRM.com v6.1 (April 2008 release).

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ABOUT SAGE SOFTWARE

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