

Sage CRM Editions

Functionality	Essentials	Professional
Base Functionality		
Contact Management - Companies, People, Address, Phone number, E-mail	✓	✓
Calendar Feature	✓	✓
Document Management	✓	✓
Interactive Dashboard	✓	✓
Cross-Browser Compatibility	✓	✓
Export reports and lists to PDF	✓	✓
Export reports and lists to CSV	✓	✓
Group Management - Mass Tasks, Document Mail Merge, Group Email, Export	✓	✓
Advanced Find	✓	✓
Microsoft Outlook Lite	✓	
Classic Microsoft Outlook Plugin		✓
Mobile Device Management	✓	✓
Reporting	✓	✓
Multi-currency enabled	✓	✓
Sales Force Management		
Sales Opportunities	✓	✓
Opportunity Pipeline Management	✓	✓
Opportunity Tracking	✓	✓
Sales Forecasting	✓	✓
Quotes and Orders Management	✓	✓
Product Management	✓	✓
Lead to Opportunity Conversion	✓	✓
Web to Lead	✓	✓
Marketing & Customer Services		
Marketing Automation		
Campaign Management		✓
Campaign Group Actions - Email, Outbound Call List, Export to CSV, Mail Merge		✓
Outbound Call Handling		✓
Customer Care		
Case Management		✓
Knowledge Base/Solution Management		✓
Twitter Integration	✓	✓
User Management		
User Administration	✓	✓
Personal User Preferences	✓	✓
My CRM to manage my information	✓	✓
Team CRM to manage workgroup information	✓	✓
Preloaded themes to change the look and feel of the UI	✓	✓

Functionality	Essentials	Professional
Security		
Field Level Security to control data access	✓	✓
Territory Management		✓
Roles-based security		✓
Add, move, edit, merge, and rebalance territories		✓
Customisation Capabilities		
Screen/List Management	✓	✓
Field & Caption Management	✓	✓
View Management		✓
Notifications	✓	✓
Advanced Customisations		
Escalation rules (*Pre-Configured Only)	✓	✓
Edit Escalation rules (*Pre-Configured Only)		✓
Workflow Management		✓
Add Client Side actions to workflows		✓
Integrations		
Real Time SData Feeds	✓	✓
Developer Interfaces		
SOAP web services API		✓
Data Management		
Data Upload from CSV	✓	✓
Product List Management	✓	✓
De-Duplication		✓
Forecast Management	✓	✓
Database Export	✓	✓
Manage Relationship Types		✓
Key Attribute Data		✓
Email & Documents		
Spellchecking	✓	✓
Library Management	✓	✓

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