



Business Partner



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Sage CRM Features and Functionality

Standard and Advanced Compared

| Sage CRM Base Functionality | Standard | Advanced |
|---|----------|----------|
| Summary Reports | ✓ | ✓ |
| Advanced Mail Manager | ✓ | ✓ |
| Component Install | ✓ | ✓ |
| Contact Management (Companies, Persons, Communications) | ✓ | ✓ |
| Crystal Reports Integration | ✓ | ✓ |
| Deduplication | ✓ | ✓ |
| Diary | ✓ | ✓ |
| Email Editor | ✓ | ✓ |
| Escalation/Notifications | ✓ | ✓ |
| Key Attribute Profiling | ✓ | ✓ |
| Library / Document Drop | ✓ | ✓ |
| Mail merge/Document Templates | ✓ | ✓ |
| Merge Companies/People | ✓ | ✓ |
| Multi Lingual Support | ✓ | ✓ |
| Multi-currency | ✓ | ✓ |
| My Dashboard | ✓ | ✓ |
| Notes Functionality | ✓ | ✓ |
| Recent List | ✓ | ✓ |
| Report / Data Export to Excel | ✓ | ✓ |
| Reports Editor | ✓ | ✓ |
| SMS Messaging | ✓ | ✓ |
| Standard Customisation Engine | ✓ | ✓ |
| Team CRM (Formerly Channels) | ✓ | ✓ |
| Territory Management/Security | ✓ | ✓ |
| User Preferences | ✓ | ✓ |

| Sage CRM Sales Functionality | Standard | Advanced |
|------------------------------|----------|----------|
| CRM Product Functionality | ✓ | ✓ |
| Opportunity Workflow | ✓ | ✓ |
| Opportunity Management | ✓ | ✓ |
| Quote Production | ✓ | ✓ |
| Sales Forecasting | ✓ | ✓ |
| Sales Pipeline | ✓ | ✓ |
| Sales Reports | ✓ | ✓ |
| Team Selling Security | ✓ | ✓ |



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Standard and Advanced Compared

| Sage CRM Marketing Functionality | Standard | Advanced |
|--|----------|----------|
| Campaign Management | X | √ |
| Company and Person Marketing Information | √ | √ |
| Data Upload | √ | √ |
| Lead Management | √ | √ |
| Lead Workflow | √ | √ |
| Marketing Reports | X | √ |
| Mass Email | √ | √ |
| Outbound Call Handling | X | √ |
| Target Lists | √ | √ |

| Sage CRM Customer Service Functionality | Standard | Advanced |
|---|----------|----------|
| Case/Issues and Solutions Pipeline | X | √ |
| Case/Issues Reports | X | √ |
| Case/Issues SLA Management | X | √ |
| Case/Issues Workflow | X | √ |
| Cases/Issues | X | √ |
| Solutions | X | √ |
| Solutions Workflow | X | √ |

| Sage CRM Additional Products | Standard | Advanced |
|--|----------|----------|
| Offline Laptops Client (Solo) ** (Only available with Named) | √ | √ |
| CTI Connector | X | √ |
| Web Self Service Toolkit | X | √ |
| Web services | √ | √ |
| Multi-Server CRM | √ | √ |

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