



## Feature Comparison Chart for SageCRM v6

Features	SageCRM (In-house)		SageCRM.com (Hosted)
	100	200	
Maximum named users	30	Unlimited	Unlimited
Sales force automation	✓	✓	✓
Call center	✓	✓	✓
Marketing automation	✓	✓	✓
Sage Pro ERP integration	*	*	—
Sage Accpac ERP integration	*	*	—
Solo server and Solo users	●	●	●
Web self-service	—	●	—
Web services	✓	✓	✓
CTI server	—	✓	—
Wireless mobile/PDA access	—	✓	✓
Advanced e-mail management server options (File-it, <a href="mailto:support@panoplytech.com">support@panoplytech.com</a> , etc)	✓	✓	—
Database options (MS SQL, Oracle, DB2)	*	*	—
Multi-Server SageCRM	*	*	—
Workflow action – Custom file name (Administration -> Advanced Customization -> Workflow (You can run an asp page from an Action within a workflow rule)	✓	✓	✓
Web to lead (Administration   Customization   Lead   Web to Lead Tab)	✓	✓	✓
<b>SageCRM v6 New Features*</b>			
Keyword search (service on server)	✓	✓	—
Advanced find	✓	✓	✓
Find   Communications	✓	✓	✓
DataUpload Option to map selection field values to code values in database	✓	✓	✓
Coaching	✓	✓	✓
Field level security	✓	✓	✓
Groups replace lists with new Boolean searching	✓	✓	✓
Quick start tab (My CRM   Quick Start Tab)	✓	✓	✓
Step 1. Take tour	✓	✓	✓
Step 2. Configure the system	✓	✓	✓
Step 3. Quick tips	✓	✓	✓
Step 4. Future reading (Product Documentation)	✓	✓	✓
Outlook integration (new features)	✓	✓	✓
Mass file e-mails for one contact	✓	✓	✓
Add shared document from within an e-mail	✓	✓	✓
Send and file e-mail in Outlook (button)	✓	✓	✓
Territory enhancement	✓	✓	✓
Rebalance to add new territories structure	✓	✓	✓
Merge territories	✓	✓	✓
Move territories	✓	✓	✓
*Please see the "What's New Guide for SageCRM v6.pdf" for complete details on new features			

### 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

Features	SageCRM (In-house)		SageCRM.com (Hosted)
	100	200	
<b>Detail Comparison of Features</b>			
Field level script – create	✓	✓	—
Field level script – OnChange	✓	✓	✓
Field level script – validate	✓	✓	—
Custom content on screens	✓	✓	✓
<b>Detail Comparison of Features – Enterprise Integration Server Functionality</b>			
Integration server (EIS/Block Server)	●	✓	—
Tables and databases (advanced customization)	● (EIS)	✓ (EIS)	— (EIS)
Table level scripts	● (EIS)	✓ (EIS)	— (EIS)
<b>Administration   Customization   &lt;Entity&gt;  </b>			
Table scripts	● (EIS)	✓ (EIS)	— (EIS)
Screens   New Button	● (EIS)	✓ (EIS)	— (EIS)
Lists   New Button	● (EIS)	✓ (EIS)	— (EIS)
Blocks   New Button	● (EIS)	✓ (EIS)	— (EIS)
Tab   SQL (code) field on tab properties	✓	✓	✓
Tab (adding new “system action” or “EIS actions”)	● (EIS)	✓ (EIS)	— (EIS)
<b>EIS Actions Available on Each Tab</b>			
Tab   Action – customfile (ASP pages)	● (EIS)	✓ (EIS)	— (EIS)
Tab   Action – customurl (Linking to an external site)	● (EIS)	✓ (EIS)	— (EIS)
Tab   Action – runblock (Running custom blocks)	● (EIS)	✓ (EIS)	— (EIS)
Tab   Action – runtabgroup (Running custom blocks)	● (EIS)	✓ (EIS)	— (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>Component Manager (Administration   Customization   Component Manager)</b>			
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)	✓	—

Note: The information contained here is based on SageCRM v6, SageCRM.com v6 (March 2007 release), and the current Price List dated 10/1/2005 from [www.accpac.com](http://www.accpac.com) on or about 10/1/2005.

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