

## Editions Matrix

Feature	Functionality	On-Demand Standard Edition	On-Demand Advanced Edition	On Premise
Contact Management	Contact Management (Companies, People, Address, Phone number, E-mail management)	■	■	■
	Calendar Feature	■	■	■
	Document Management	■	■	■
	Classic Dashboard	■	■	■
	Interactive Dashboard	□	□	■
	Export reports and lists to PDF	■	■	■
	Export reports and lists to CSV	■	■	■
	Export reports and lists to Excel	□	□	■
	Mass tasks / document/ export from lists and groups and dynamic and static group management	■	■	■
	Keyword Search	□	□	■
	Advanced Find	■	■	■
Opportunity Management	Sales Opportunities	■	■	■
	Opportunity Pipeline Management	■	■	■
	Opportunity Tracking	■	■	■
	Sales Forecasting	■	■	■
	Quotes and Orders Management	■	■	■
	Product Management	■	■	■
Lead Management	Lead to Opportunity Workflow	■	■	■
Customer Support	Case Management	□	■	■
	Knowledge Base / Solution Management	□	■	■
Marketing	Send mass e-mails from Groups	■	■	■
	Mass E-mail Status tab	□	■	■
	Campaign Management	□	■	■
	Outbound Call Handling	□	■	■
User Management	User Administration	■	■	■
	My User Preferences	■	■	■
	My CRM to manage my information	■	■	■
	Team CRM to manage my teams information	■	■	■

Feature	Functionality	On-Demand Standard Edition	On-Demand Advanced Edition	On Premise
User Management	Preloaded themes to change the look and feel of the UI	■	■	■
	Ability to create custom themes	□	□	■
Security	Field Level Security to control data access	■	■	■
	Territory Management	■	■	■
	Set up security profiles and security policies	■	■	■
	Add, move, edit, merge, and rebalance territories	■	■	■
	Set up password policies	□	□	■
	User Roles / Persona Management	■	■	■
Add-Ons	Outlook Integration	■	■	■
	Mobile Access	■	■	■
	Solo offline access	■	■	■
	Self Service	□	□	■
	E-mail Manager	□	□	■
	CTI Integration	□	□	■
	Crystal Report Integration for Advanced Reports	□	□	■
Standard Customization	Caption Translation to customize screens	■	■	■
	Component Manager for adding new entities	□	□	■
	Field Management – Add / Remove new fields from screens	■	■	■
	Block / Screen Management	■	■	■
	Field level Create Scripts	□	□	■
	Field level Validate Scripts	□	□	■
	Table Level Scripts	□	□	■
	View Management	■	■	■
	Notifications	■	■	■
	Reports - updating and creating reports	■	■	■
	Enable or disable entities for Sage Data (SData) access	□	□	■
Classic Dashboard Management	■	■	■	
Advanced Customization	Workflow Management	■	■	■

Feature	Functionality	On-Demand Standard Edition	On-Demand Advanced Edition	On Premise
Advanced Customization	Workflow Preview	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Create new Escalation Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Escalation rules in workflows	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Create Escalation rules outside of workflow	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Execute SQL Statement actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Run Stored Procedure actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Send SMS Message actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Create Scripts to workflow actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add OnChange Scripts to workflow actions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Validate Scripts to workflow actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Key Attributes to record dynamic data people, companies, leads opportunities and cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Button Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Tables and Databases	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Real Time Views (Integration)	Aged Debt	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Company Financial information, etc	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Order Processing	Link quote / order in Sage CRM with Sage 50 quotes / orders,	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	More accurate pricing of quotes and orders (back office)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Developer Interfaces	SOAP web services API	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	COM API	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	SData API	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	.NET API	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Data Management	Data Upload from CSV	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Data Upload from Excel	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Product Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Match Rules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Company Name Cleanup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Currency Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data Management	Forecast Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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	Download Database	■	■	□
	Manage Relationship Types	■	■	■
E-mail and Documents	Configure the system to file inbound e-mails according to a set of predefined rules	□	□	■
	Configure Advanced E-mail Management Server Options	□	□	■
	Advanced spellchecking	□	□	■
	Standard spellchecking	■	■	■
System Behavior	Configure Keyword Searching and monitor index performance	□	□	■
	Change use company / individual settings	□	□	■
	Enable Dashboard tab	■	■	■
	Change maximum number of occurrences	□	□	■
	Change server time zone	■	■	■
	Change recent list length	■	■	■
	Change Search Select Advanced fields grid size settings	■	■	■
	Change default system theme setting	■	■	■
	Change default CSV file export delimiter setting	■	■	■
	Configure Keyword Search and monitor index performance	□	□	■
	View all license key details	■	■	■
	Change proxy settings for the Interactive Dashboard	□	□	■