July 31 Launch – Customer FAQ

GENERAL

What is SugarCRM announcing?

SugarCRM has a lot of exciting news! We are unveiling:

- A new vision and mission
- A new and expanded product portfolio targeted at the Customer Experience market
- A new brand and brand story
- A new website

All of this is in addition to many other changes we've announced over recent months, including new investors and executive team, our new customer conference, and multiple acquisitions.

THE NEW SUGAR

What is "The New Sugar"?

The New Sugar is a blanket term for all the changes we've made and are continuing to make at Sugar. When you consider all of these changes – new vision, mission, product portfolio, market category, brand, website, investors, executives, acquisitions, and customer conference – it really is an exciting, significant, and relevant reinvention of Sugar. At our core, we are still the company that values customers above all, but we are improving our alignment with the market, creating offerings with significantly enhanced value, and updating our brand to reflect the new focus. The New Sugar was the best way to present these changes and launch them simultaneously to create the most energy and momentum to propel us forward in the customer experience industry.

Can you explain the New Sugar vision statement?

Our vision is to *create a world where companies cultivate customers for life by anticipating and fulfilling needs before customers realize they have them.*

We thought long and hard about our vision, what it should be, and how we should express it. Vision statements focus on the future and define aspirations of a company. They express our hopes and dreams, the problems we are solving for the greater good, and what we are inspired to change. We believe that our vision statement now sets a more ambitious and future-looking path, one that can guide us over a longer term and we can reflect on later to assess our progress.

Our vision statement can be fully understood in five steps:

1. **Customers for Life** – Loyal customers are the best customers. They're reliable. They're receptive to new sales opportunities. They're valued strategic partners. And best of all, their enthusiastic endorsement creates new customers.

2. **Exceeding Expectations** – But how do you create customers for life? Think about the brands where you are highly loyal. How did they earn that? Lifelong customers are cultivated by *consistently exceeding expectations across the customer journey*.

3. **Predictive Insight** – To consistently exceed expectations, it is not enough to simply collect customer data and document interactions to report on later. That is management in arrears. Companies must transcend the data using AI to discover new truths, identify key correlations and trends, and make bankable predictions about the future.

4. **Frontline Empowerment** – Those insights must be put into the hands of frontline employees who engage with customers daily and shape their experiences. And that must occur in real-time and within their tool(s) of choice.

5. **Competitive Advantage** – With timely predictive insight in the hands of the right people, companies can exceed expectations regularly by anticipating and fulfilling the needs of customers before they realize they have them. Companies that are able to do this create customers for life and a sustainable competitive advantage.

Can you explain the new Sugar mission statement?

Our mission statement is to *enable businesses to create customers for life with the world's first intelligent, no touch customer experience (CX) platform*.

A good mission statement adds specificity and focus to the vision. It defines the company's business, its objectives, and its approach to reach those objectives. A mission statement focuses on today and what the organization does. It defines what we do, who we serve, and how we serve them.

Our missions statement explains *how* we help companies create customers for life – what our part is in that process. It also succinctly articulates our differentiation from other companies that play a part in the process, or desire to.

Have the SugarCRM values changed?

No, our values remain largely unchanged. We have adjusted our descriptive wording of them a bit, but we maintain the same values of:

- **Innovative** – We create indispensable solutions to problems you hadn't yet realized you had
- **Open** – We approach problems transparently, creating visibility in all we do
- **Integrity** – We say what we're going to do, and we do what we say
- **Value** – We enhance value in everything that we do

- **Passion** – Our excitement, enthusiasm, and energy is contagious

That our values have not changed is good - because values that don't endure run the risk of merely being platitudes.

What are "The Three Pillars"?

The three pillars are our core differentiators versus our competition. They define areas of distinction that Sugar can stake a legitimate claim to as our own, and for which we will defend a leadership position with all our ability. They're a combination of our strengths today and what we aspire to going forward. So, in that sense they're not just how we position ourselves in the market, they're also our "North Star", guiding our product development efforts.

Our three pillars are:

- **Intelligent Customer Experience Platform** – *Harnesses customer data and discovers actionable insights and next best actions*

  Sugar's Intelligent Customer Experience Platform aggregates customer from a wide variety of internal sources, unifies the data into a single data model, augments it with data from external and 3rd party sources, and employs AI and machine learning to derive predictive insights and next best action guidance from the data. It also adds a time dimension to customer data so to enable time series analysis.

- **No Touch Information Management** – *Spend less time entering and finding data and more time on high value work*

  No Touch Information Management is the Sugar design philosophy of taking advantage of every opportunity to automate the collection, processing, and presentation of customer information. No Touch Information Management captures information as an automated byproduct of the user working – engaging with customers, using other tools and systems, etc. It automatically processes and enhances data with predictive insights. And finally, it delivers customer data directly to users in-context with what they're doing, within their tools of choice, so that they receive key insights just when they need them.

- **Continuous Cloud Innovation** – *Trust in the most modern, durable, and future-proof CX platform on the market*

  Sugar makes extensive use of the most rapidly innovating commercial cloud technology available. Some CX vendors are hosted on a commercial cloud provider. But only Sugar makes such extensive use of the advanced technologies available from our cloud provider. As a result, our cloud infrastructure averages a 40% increase in new features and capabilities every year, while maintaining extremely competitive prices. Our cloud provider's infrastructure is truly global, giving Sugar the ability to expand to 190 countries worldwide. Our data centers comply with 34 different security and compliance standards and are audited in an almost continuous fashion. All of this means that Sugar and our customers always have access to the most advanced, secure, scalable, and reliable

infrastructure technology available, at prices driven by the enormous economies of scale only possible with the commercial cloud.

How do Sugar's products change as a result of the new Sugar?

With the new Sugar, we are introducing a comprehensive portfolio of customer experience products spanning both cloud and on-premise deployment. With our new portfolio, Sugar can better match customer needs with specialized products and continue to provide the deployment and customization flexibility that we are known for. For more information, see the Product Packaging and Portfolio section of this document.

Also, you can count on Sugar prioritizing development work to deliver on and extend our leadership position with respect to the three pillars.

BRANDING

What exactly is branding?

Branding typically refers to the set of names, terms, graphic design elements, symbols, and other features that identify a company's goods and services distinctly from other sellers in the market. In the case of Sugar, our brand includes our company and product names, logos, fonts, color palette, icons, writing style, and imagery.

What parts of the SugarCRM brand are changing?

All parts of Sugar's brand are changing except the company name. This includes product names, logos, fonts, color palette, icons, writing style, and imagery.

Why is SugarCRM changing its brand?

When you consider all of the changes that are occurring at Sugar – new vision, mission, product portfolio, market category, brand, web site, investors, executives, acquisitions, and customer conference – it really is an exciting, significant, and relevant reinvention of Sugar. From a market sentiment and perception point of view, these changes are driving a major evolution in how we are viewed. It is the perfect opportunity to update other tangible brand elements to refresh our image and reflect our renewed vitality and change in strategy.

Is the SugarCRM company name changing?

No, our company name remains SugarCRM. The name SugarCRM has tremendous history, goodwill, and brand equity that we do not wish to lose. As a result, we are keeping the SugarCRM name. However, to reflect how our name is commonly used by the market and the fact that we have broadened our solution set beyond Customer Relationship Management, we are adopting a new usage convention where after the first use of SugarCRM in a document, we simply shorten the name to "Sugar".

SUGAR 9.1 RELEASE

What is in the Sugar 9.1 release?

Sugar 9.1 is major milestone in the evolution of our products. With 9.1, Sugar delivers:

- **Three new products:**
  - **Sugar Market** – A rebranding of Sugar's recently-acquired marketing automation solution, Salesfusion, Sugar Market is the all-you-need marketing automation solution designed to supercharge marketing efficiency and productivity
  - **Sugar Sell** – The award-winning sales automation solution renowned for its intuitive user interface, extensibility, and customer satisfaction
  - **Sugar Serve** – Sugar's new customer engagement center solution designed to streamline case management and issue resolution
- **New Sugar Market Features:**
  - **Sugar Market Ads** – Integrated Google Ads capabilities to attract more website visitors and drive more conversions
  - **Sugar Market Contacts and Accounts View 2.0** – Enables account-based marketing capabilities for customers, opening new marketing avenues
- **Sugar Cloud Insights** – Provides on-demand access to administrative controls and information over the Sugar cloud environment, such as database and file system storage, license usage and expiration, and error and access logs
- **SugarIdentity** - Provides federated identity and comprehensive single sign on across Sugar's applications and services, helping customers securely manage user identities and access to applications and services in the Sugar ecosystem
- **Tile View** - Provides a pivot table-like organizational structure to the opportunity pipeline, including managing opportunities by sales stage and expected close date
- **Sugar Mobile Enhancements** - Brings drill-down insights, enhanced collaboration, and a better quoting experience for multiple currencies
- **SugarBPM Advanced Email Handling** - Monitors and triggers email-based actions within a workflow and allows setting "From" and "Reply-To" email addresses in automated emails

PRODUCT PORTFOLIO AND PACKAGING

What does Sugar's product portfolio now look like?

For *existing* customers, Sugar's product portfolio looks very much the same. Sugar Pro and Enterprise, for both cloud and on-premise, will continue as supported product offerings. We will continue to issue quarterly releases (on the cloud) or annual releases (on-premise) with defect fixes and enhancements to these products. Further, if you wish to purchase additional user seats for your existing Pro/Enterprise solution, you will be able to do so. For more information, see the "Sugar Professional and Enterprise" section of this FAQ.

For *new* customers, Sugar's product portfolio can be divided into two main categories:

- **Cloud Products** – Sugar offers a complete cloud-based customer experience suite spanning marketing, sales, and customer service. All of our cloud products are available via SaaS only, and are not available for on-site deployment. Sugar cloud products include:

  - **Sugar Market** – The all-you-need marketing automation solution designed to supercharge marketing efficiency and productivity
  - **Sugar Sell** – The award-winning sales automation solution renowned for its intuitive user interface, extensibility, and customer satisfaction
  - **Sugar Serve** – Sugar's new customer engagement center solution designed to streamline case management and issue resolution
  - **Sugar 5-Seat Edition** – 5-Seat Edition is a small company CRM solution available only through Sugar resellers.
    - Functionally, 5-Seat Edition is identical to Sugar Professional
    - It is limited to five seats and is available only as a cloud offering
    - Community support is the only support option for this edition

- **On-Premise Products** – Sugar understands that cloud-based solutions aren't for every company. That's why, for more than 15 years, we've continued to offer the industry's most flexible options for on-premise deployment. Our on-premise solutions are for companies that need to comply with specific security policies or that want greater control over updates and enhancements. All on-premise products are available for on-site deployment only.

  - **Sugar Professional** – Sugar Pro is our on-premise CRM solution that is ideal for small businesses
  - **Sugar Enterprise** – Sugar Enterprise is our on-premise CRM solution targeted at medium and large size companies
    - On top of Pro's capabilities, Enterprise adds product-level quoting, forecasting, advanced workflow, team-based roles, self-service portal, and enhanced customer support and storage options

What other products are available?

In addition to our core cloud and on-premise products, offers add-on products such as Hint Insight, Customer Journey Plug-In, Collabspot, LinkedIn Sales Navigator, and Oktopost for Sugar Market. And of course, with Sugar comes the option to purchase from an extensive collection of 3rd party extensions at SugarExchange.

With the new product portfolio, how often will Sugar products be updated?

The cadence of product releases will remain very similar to how it is today:

- Sugar Sell, Sugar Serve, Sugar 5-Seat Edition: Quarterly releases
- Sugar Enterprise, Sugar Professional: Annual releases

- Sugar Market: Operates on a continuous update cycle, with releases approximately once every two weeks
- Add-Ons: Release cycle times vary depending on release content

One key difference is that the annual releases for Sugar Enterprise and Pro will no longer be roll-ups of the four quarterly cloud releases. There will be some functional overlap between cloud and on-premise releases, but the release contents between cloud and on-premise products will also diverge in key ways, introducing functionality that is unique to on-premise and cloud.

Sugar Professional and Enterprise are the preferred products for customization and customer control over software releases. As in the past, Pro and Enterprise are ideal platforms for building highly-tailored sales and support applications, leveraging our core CX and powerful extension capabilities. Pro and Enterprise will also continue to support more flexible software upgrade policies than our cloud solutions, giving customers control over their solution's technology stack. Future releases for Pro and Enterprise will continue to add features that enhance platform customization, flexibility, and control.

Sugar Market, Sell, and Serve are our cutting-edge technology applications. As such, future releases for these products may leverage state-of-the-art cloud technologies that aren't feasible for inclusion in our on-premise products due to limitations in making cloud technologies accessible on private intranets. For example, we recently integrated with our cloud provider's event bus service to establish a secure and highly configurable streaming API between Sugar Sell and Serve and our customers' applications. Using this streaming API, customers can subscribe to CRM events such as contact or account record creation, deletion, or update, and react to changes happening in the CRM in near real time. Customers can use a wide variety of tools to automate responses and actions to CRM events. This innovation would be prohibitively difficult, expensive, and time-consuming to provide in an on-premise product.

SUGAR MARKET

What is Sugar Market?

A rebranding of Sugar's recently-acquired marketing automation solution, Salesfusion, Sugar Market is the all-you-need marketing automation solution designed to supercharge marketing efficiency and productivity.

I have Sugar Professional/Enterprise. Will Sugar Market be included in my license?

No, Sugar Market provides significant new capabilities that are well beyond the scope of Sugar Pro or Enterprise. However, the marketing automation features that are currently in Sugar Pro and Enterprise will remain available to you and we will continue to support those features going forward. Sugar Market is licensed separately, and continues Sugar's reputation for providing high-value, reasonably priced products using a transparent pricing model.

I have Salesfusion. Do I get Sugar Market for free? Will I be automatically upgraded? Will moving to Sugar Market cost me more money?

Sugar Market is a simple re-naming of Salesfusion. On July 31, the Salesfusion application will be renamed and when you log in, you will see the new name and will be using Sugar Market. All functionality will be exactly the same, with the exception of the new features and defect fixes that we implemented in this release. The "upgrade" to Sugar Market is automatic and will be performed with no cost or effort on your part.

What is the difference between Sugar Market and Salesfusion?

Functionally, there is no difference between Sugar Market and Salesfusion. Sugar Market is a simple re-naming of Salesfusion.

Does Sugar Market integrate with Sugar Sell, Serve, Pro, or Enterprise?

Yes, Sugar Market integrates with all on-premise and cloud versions of Sugar – Pro, Enterprise, Sell and Serve.

Are there Professional and Enterprise editions of Sugar Market?

No, Sugar Market is currently available in only one edition.

Can I get Sugar Market installed on-premise?

No, Sugar Market is cloud-only.

How do I buy Sugar Market?

Contact your Sugar Partner sales or SugarCRM sales representative.

SUGAR SELL

What is Sugar Sell?

Sugar Sell is the award-winning sales automation solution renowned for its intuitive user interface, extensibility, and customer satisfaction. Sell enables businesses to create extraordinary customer relationships by bringing customer data into one place and providing comprehensive sales automation, collaboration, and reporting. Sugar Sell customers are able to drive revenue, increase efficiency, reduce sales costs and deliver unmatched customer buying experiences.

How is Sugar Sell different from Sugar Enterprise?

Where Sugar Enterprise includes broad CRM functionality in one solution, Sugar Sell is focused on enabling sales process automation and enablement. To that end, the following capabilities are included in Sell:

- Accounts
- Contacts

- Campaigns
- Lead management
- Activity management
- Opportunities
- Revenue line items
- Forecasts
- Quotas
- Quotes and quoted line items
- Product catalog, categories, and types
- Manufacturers, currencies, shipping providers, and tax rates
- Contracts
- Reporting
- SugarBPM and workflow templates
- Data privacy
- Business centers
- Administration
- Mobile
- Tile view
- Version 10+ REST APIs
- Lead convert
- Activity streams

Relative to Sugar Enterprise, the following capabilities are not included in Sell:

- Case management
- Some legacy functionality such as Projects, SugarWorkflow, outdated SOAP and REST APIs

I have Sugar Professional/Enterprise. Will Sugar Sell be included in my license?

No, Sugar Sell is a new product offering. You can continue using Sugar Pro/Enterprise and Sugar will continue to support and enhance them. However, if you wish to migrate to Sugar Sell, we are offering very attractive license migration terms. See the "Upgrades and Migrations" section of this FAQ for more information.

I have Sugar Professional/Enterprise. Will I be forced to upgrade/migrate to Sugar Sell?

Sugar currently has no plans to require customers to migrate to Sugar Sell. We believe that the new functional capabilities possible with a cloud-only solution like Sugar Sell will be very compelling to customers, and we are offering very attractive license migration terms for those customers that want to migrate. (See the "Upgrades and Migrations" section of this FAQ for more information.) But we realize that many customers require the deployment and upgrade flexibility of our on-premise products, and we intend to continue to offer, support, and enhance them.

I have Sugar Professional/Enterprise. How do I migrate to Sugar Sell?

Contact your Sugar Partner sales or SugarCRM sales representative.

Does Sugar Sell integrate with Sugar Serve?

Yes, Sugar Serve is built on the same platform and underlying database as Sugar Sell. When both products are licensed, they share common data and technology components.

Does Sugar Sell integrate with Sugar Market?

Yes, a tight integration exists between Sugar Market and Sugar Sell, as well as Sugar Pro and Enterprise.

Are there Professional and Enterprise editions of Sugar Sell?

No, Sugar Sell is currently available in only one edition.

Can I get Sugar Sell installed on-premise?

No, Sugar Sell is cloud-only.

How do I buy Sugar Sell?

Contact your Sugar Partner sales or SugarCRM sales representative.

SUGAR SERVE

What is Sugar Serve?

Sugar Serve is our new customer engagement center solution designed to streamline case management and issue resolution. Sugar Serve provides a superior agent desktop experience for your customer support professionals. Blending modern multi-channel response management, powerful business process management (BPM), and self-service frameworks, Sugar Service Cloud gives agents everything they need in a highly intuitive and highly effective cloud solution. In addition, Sugar Service Cloud is pre-integrated with Sugar's core CRM, allowing your business to better optimize the customer lifecycle end-to-end, thus increasing customer satisfaction, retention, and recurring revenue, and lowering overall IT costs.

What are the key features of Sugar Serve?

Service Console – Provides a single work environment for service agents, placing data points such as next best action based on SLA, account and contact information, account activity history and even case details, front and center – with no searching or navigation required

SLA Management – Prioritizes work, ensures SLA achievement, and measures support performance through the coordinated management of complex SLAs, multi-region business centers, and business hours

SugarBPM Automation – Leverages out-of-the-box workflows and SugarBPM to prioritize work intelligently; route, reassign, and escalate cases; calculate follow-up dates; and send notifications

Self-Service – Enables customers to resolve issues and find answers to questions with an easy-to-use customer portal and knowledge base

Reporting and Analytics – Provides support center managers deeper insights into the metrics that matter with over sixty pre-packaged reports and dashboards

How is Sugar Serve different from Sugar Enterprise?

Where Sugar Enterprise includes broad CRM functionality in one solution, Sugar Serve is focused on enabling customer service automation. To that end, the following capabilities are included in Serve:

- Service console
- Accounts
- Contacts
- Activity management
- Product catalog, categories, and types
- Manufacturers and currencies
- Case management
- Reporting
- SugarBPM and workflow templates
- Data privacy
- Business centers
- Administration
- Mobile
- Portal
- Tile view
- Version 10+ REST APIs
- Activity Streams

The following capabilities are not included in Serve:

- Lead management
- Campaigns
- Opportunities
- Revenue line items
- Forecasts
- Quotas
- Quotes and quoted line items
- Product catalog, categories, and types
- Shipping providers and tax rates
- Contracts
- Some legacy functionality such as Projects, SugarWorkflow, outdated SOAP and REST APIs

I have Sugar Professional/Enterprise. Will Sugar Serve be included in my license?

No, Sugar Serve is a new product offering. You can continue using Sugar Pro/Enterprise and Sugar will continue to support and enhance them. However, if you wish to migrate to Sugar Serve, we are offering very

attractive license migration terms. See the "Upgrades and Migrations" section of this FAQ for more information.

Does Sugar Serve integrate with Sugar Sell?

Yes, Sugar Serve is built on the same platform and underlying database as Sugar Sell. When both products are licensed, they share common data and technology components.

I have Sugar Professional/Enterprise. Does Sugar Serve integrate with my product?

Sugar Serve does integrate with the cloud version of Sugar Enterprise. Sugar Serve does not integrate with:

- Sugar Professional on the cloud
- Sugar Professional on-prem
- Sugar Enterprise on-prem

Customers of these products can purchase Sugar Serve, but the products will not interoperate or share data. It is recommended that customer migrate to Sugar Sell if integration with Sugar Serve is required.

Are there Professional and Enterprise editions of Sugar Serve?

No, Sugar Serve is currently available in only one edition.

Can I get Sugar Serve installed on-premise?

No, Sugar Serve is cloud-only.

How do I buy Sugar Serve?

Contact your Sugar Partner sales or SugarCRM sales representative.

SUGAR PROFESSIONAL AND ENTERPRISE

What is Sugar Professional/Enterprise?

Sugar Pro and Enterprise are our classic products. They have not changed, except that they are now exclusively on-prem products for new customers. Sugar understands that cloud-based solutions aren't for every company. That's why, for more than fifteen years, we've offered the industry's most flexible options for on-premise deployment. Sugar Pro and Enterprise continue this our leadership in this area. Pro and Enterprise offer a comprehensive set of on-premise product solutions that support higher levels of customization than typically available on SaaS platforms. Large enterprises have come to depend on Sugar as a framework for building highly-tailored sales and support applications, leveraging our core CX and powerful extension capabilities. Flexible platform upgrade policies are also possible with Sugar on-premise solutions, giving customers control over their application's technology stack.

I currently have Sugar Professional/Enterprise in the cloud. Is it going away? Are you going to force me to move on-premise? Are you going to force me to move to Sugar Sell/Serve?

No, while there will be no further sales of Pro/Enterprise on the cloud to *new* customers, Sugar currently has no plans to require *existing* customers of Pro/Enterprise on the cloud to migrate to other offerings. Pro and Enterprise on the cloud will continue as supported product offerings and we will continue to issue quarterly releases with defect fixes and enhancements to these products. Further, if you wish to purchase additional user seats for your existing Pro/Enterprise on the cloud solution, you will be able to do so. We believe that the new functional capabilities possible with Sugar Sell and Serve will be very compelling to customers, and we are offering very attractive license migration terms for those customers that want to migrate. (See the "Upgrades and Migrations" section of this FAQ for more information.) But we realize that some customers will want to remain on their current products, and we intend to continue to offer, support, and enhance them.

What happens to Sugar Professional and Sugar Enterprise going forward? Are they being discontinued?

No, Sugar currently has no plans to discontinue the Pro/Enterprise products. The only change is that for *new* customers, they are available only as on-premise solutions. Pro/Enterprise will continue as supported product offerings and we will continue to issue regular releases with defect fixes and enhancements to these products. We believe that the new functional capabilities possible with a cloud-only solution like Sugar Sell will be very compelling to customers, and we are offering very attractive license migration terms for those customers that want to migrate. (See the "Upgrades and Migrations" section of this FAQ for more information.) But we realize that some customers will want to remain on their current products, and we intend to continue to offer, support, and enhance them.

I have Sugar Professional/Enterprise. Do I get Sugar Market/Sell/Serve for free?

No, Sugar Market, Sell, and Serve are new offerings and are not bundled with Sugar Professional or Enterprise. However, if you wish to migrate from Pro/Enterprise to Sugar Sell, Serve, or both, we are offering very attractive license migration terms. See the Upgrades and Migrations section of this FAQ for more information.

What is the difference between Sugar Professional/Enterprise and Sugar Market?

There is a small amount of overlap between the marketing automation capabilities of Sugar Pro and Sugar Enterprise versus Sugar Market's. But Sugar Market takes it to the next level with advanced features such as campaign management, lead nurturing, search and social tools, and best-in-class reporting and analytics. Even better, all this advanced capability is harnessed with a very intuitive user interface. Sugar Market represents a huge leap forward in marketing automation capabilities.

What is the difference between Sugar Professional/Enterprise and Sugar Sell?

Where Sugar Pro and Enterprise include broad CRM functionality in one solution, Sugar Sell is focused on enabling sales process automation and enablement. To that end, the following capabilities are included in Sell:

- Accounts
- Contacts

- Campaigns
- Lead management
- Activity management
- Opportunities
- Revenue line items
- Forecasts
- Quotas
- Quotes and quoted line items
- Product catalog, categories, and types
- Manufacturers, currencies, shipping providers, and tax rates
- Contracts
- Reporting
- SugarBPM and workflow templates
- Data privacy
- Business centers
- Administration
- Mobile
- Tile view
- Version 10+ REST APIs
- Lead convert
- Activity streams

Relative to Sugar Enterprise, the following capabilities are not included in Sell:

- Case management
- Some legacy functionality such as Projects, SugarWorkflow, outdated SOAP and REST APIs

What is the difference between Sugar Professional/Enterprise and Sugar Serve?

Where Sugar Pro and Enterprise include broad CRM functionality in one solution, Sugar Serve is focused on enabling customer service automation. To that end, the following capabilities are included in Serve:

- Accounts
- Contacts
- Activity management
- Product catalog, categories, and types
- Manufacturers and currencies
- Case management
- Reporting
- SugarBPM and workflow templates
- Data privacy
- Business centers
- Administration

- Mobile
- Portal
- Tile view
- Version 10+ REST APIs
- Activity streams

The following Sugar Enterprise capabilities are not included in Serve:

- Lead management
- Campaigns
- Opportunities
- Revenue line items
- Forecasts
- Quotas
- Quotes and Quoted line items
- Product catalog, categories, and types
- Shipping providers and tax rates
- Contracts
- Some legacy functionality such as projects, SugarWorkflow, outdated SOAP and REST APIs

Can I get Sugar Professional/Enterprise in the cloud?

No, Sugar Pro and Enterprise are on-prem only solutions for all new customers. Customers that need cloud solutions are directed to Sugar Market, Sell, and Serve.

I have Sugar Professional/Enterprise. Does Sugar Serve integrate with my product?

Sugar Serve does integrate with the cloud version of Sugar Enterprise. Sugar Serve does not integrate with:

- Sugar Professional on the cloud
- Sugar Professional on-prem
- Sugar Enterprise on-prem

Customers of these products can purchase Sugar Serve, but the products will not interoperate or share data. It is recommended that customer migrate to Sugar Sell if integration with Sugar Serve is required.

Will Sugar Sell and Serve features make their way to the on-premise products?

Some Sell/Serve features will show up in Pro and Enterprise, but not all. By designating Sell and Serve as cloud-only products, we have a greater opportunity to leverage cutting-edge technology from our cloud service providers. For example, we recently integrated with our cloud provider's event bus service to establish a secure and highly configurable streaming API between Sugar Sell and Serve and our customers' applications. Using this streaming API, customers can subscribe to CRM events such as contact or account record creation, deletion, or update, and react to changes happening in the CRM in near real time. Customers can use a wide variety of tools to automate responses and actions to CRM events. This innovation would be prohibitively difficult, expensive, and time-consuming to provide in an on-premise product. On the other hand, as the

preferred platform for customization and customer control over software releases, we will be introducing features to make Pro and Enterprise on-premise even more easy and flexible for customization. So Sugar will continue to innovate on both product lines, but on different paths.

How do I buy Sugar Professional/Enterprise?

Contact your Sugar Partner sales or SugarCRM sales representative.

PRICING

How much do the products cost?

For questions about pricing, please contact your Sugar Partner sales or SugarCRM sales representative.

I have Sugar Professional/Enterprise. What happens at renewal?

At renewal, your Sugar Partner sales or Sugar sales representative can help you choose your best option going forward. One option will be to renew on the product you are already using, but you may also have the option to migrate to one of our other offerings if it makes sense for your situation. We believe that the new functional capabilities possible with Sugar Sell and Serve will be very compelling to customers, and we are offering very attractive license migration terms for those customers that want to migrate. (See the "Upgrades and Migrations" section of this FAQ for more information.) But we realize that some customers will need or want to remain on their current products, and we intend to continue to offer, support, and enhance them.

UPGRADES AND MIGRATIONS

I currently have Sugar Professional/Enterprise. What are my upgrade options?

At a high level, your options are:

- Stay on your current product
- Migrate to Sugar Sell, Sugar Serve, or both
- If you are a Sugar Pro on-premise customer, you can upgrade to Sugar Enterprise on-premise, or to Sell and/or Serve
- If you are a Sugar Pro cloud customer, you can upgrade to Sugar Sell and/or Serve

Your Sugar Partner sales or Sugar sales representative can help you choose your best option given how you are using your current product. One option will be to stay on the product you are using, but you may have additional migration options to consider that may be advantageous to you.

I currently have Sugar Professional/Enterprise and would like to move to Sell and/or Serve. Is this going to cost me more money?

Migrating to Sugar Sell or Serve will involve converting your existing Pro/Enterprise licenses to Sell or Serve licenses. The actual price for license migration depends on the product you're migrating from, the product(s)

you're migrating to, and how you use your current product. However, we are offering very attractive license migration terms so that many customers can migrate their current users to Sell and/or Serve and pay little or no additional license fees.

In addition to licensing, migrating from an on-premise product to a cloud product such as Sugar Sell or Serve will typically involve services (from a Sugar partner or Sugar, whichever is appropriate) and associated fees to assist, plan, and execute the migration.

For more details about pricing, please contact your Sugar Partner sales or SugarCRM sales representative.

I bought Sugar Professional/Enterprise because it offers both sales force automation and customer support capabilities for one price. How is that going to work now that Sugar is splitting the functionality?

If your users are currently accessing both the sales automation and customer service modules of Pro/Enterprise, Sugar has put together favorable license migration terms that can provide both Sell and Serve licenses to these users. In many cases, there will be little or no additional licensing cost associated for these users. To assess your best migration option, please contact your Sugar Partner sales or SugarCRM sales representative.