SugarCRM Platform Capabilities Comparison Chart

The following information is a side-by-side comparison of SugarCRM products. The features listed in this table are high-level descriptions of functions and may not be implemented identically in all Sugar products. If you have additional questions, please speak with your Sugar Partner or SugarCRM representative.

	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Deployment	SugarCloud	SugarCloud	SugarCloud	SugarCloud	On-Premises
Release Schedule	Monthly	Quarterly	Quarterly	Quarterly	Annual
SALES					
Account Management	●	●	●	●	●
Contact Management	●	●	●	●	●
Personalized Dashboards and Homepage	●	●	●	●	●
Lead Management and Routing	●		●	●	●
Opportunity Management	●		●	●	●
Sales Email Campaigns	●		●	●	●
Calendar		●	●	●	●
Escalation Management		●	●	●	●
Product Catalog, Categories, and Types		●	●	●	●
Activity Management (meetings, calls, tasks, etc.)			●	●	●
Contracts			●	●	●
Revenue Forecasting			●	●	●
Lead Conversion			●	●	●
Lead response Sales Centers for SLA			●	●	●
Out-of-the-Box Sales Reports			●	●	●
Product Level Opportunity Management			●	●	●
Quotas			●	●	●
Quote templates, PDF generation, support for multiple currencies and tax rates			●	●	●
Sales Team Management			●	●	●
Team Collaboration for Sales			●	●	●
Kanban View for Opportunities, Tasks & Leads			●	●	●
Revenue Line Items			●	●	●
Service-Based Line Items			●	●	●
Doc Merge		●	●	●	●
Customer Purchase History Tracking		●	●	●	●
Product-Level Purchase Analysis		●	●	●	●
Omnichannel Customer and Prospect Engagement		●	●	●	
AI – Sentiment Analysis		●	●	●	
Timeline Dashlet		●	●	●	●
Active Subscription & Purchase History Dashlets			●	●	●
Coterminous Add-ons			●	●	●
Automated Renewal Pipeline Creation			●	●	●
Renewals Console			●	●	●
AI - Lead Analysis, Scoring & Prioritization	●		●	●	
AI - Ideal Company Profile (ICP)			●	●	
AI - Opportunities Closed-Win Predictions			●	●	
Advanced Forecast and Pipeline Insights			●		

	Market	Serve	Sell Premier	Sell Advanced	Enterprise
SERVICE					
Account Management		●	●	●	●
Contact Management		●	●	●	●
Activity Management (Meetings, calls, tasks, etc.)		●	●	●	●
Internal and Self-help Knowledge Base		●	●	●	●
Team Collaboration for Service		●			●
Case/Ticket Management		●			●
Bug and Feature Request Management		●			●
Service Reports		●			●
Timeline Dashlet		●	●	●	●
Omnichannel Customer and Prospect Engagement		●	●	●	
AI – Sentiment Analysis		●	●	●	
Doc Merge		●	●	●	●
Calendar		●	●	●	●
Active Subscription and Purchase History Dashlets		●	●	●	●
Portal – User management		●	●	●	●
Portal – Secure communications with agent		●	●	●	●
Portal – Enhanced Theme and Visibility Configuration		●	●	●	●
Case Deflection and Knowledge Search		●			●
Service Console for Agents		●			
Business Centers for Response SLA Management		●			●
Case Time-to-Resolution Analytics		●			●
Kanban View for Cases and Tasks		●			●
Workflows for Common Service Processes		●			●
MARKETING					
Activity Management (Tasks)	●		●	●	●
Convert Lead Form	●		●	●	●
Campaign Wizard	●		●	●	●
Email Marketing	●		●	●	●
Newsletter Management	●		●	●	●
Drip Campaigns	●				
Dynamic Email Content	●				
AI – Lead Interest Scoring Prediction	●				
Lead Nurturing with real-time control and Stats	●				
Buyer Journey Analysis	●				
Account-Based Marketing (ABM)	●				
Personalized Marketing Dashboards and Homepage	●				
Web Analytics and Activity Dashboards	●				
Social Media Publishing, Tracking, and Analytics	●				
Social Media Publishing Advocacy	●				
Google Ads Management	●				
Drag and Drop Responsive Landing Page Builder	●				
Landing Page Best Practices Templates	●				
Mobile Optimization (Email, Landing Pages, Forms)	●				
Form Builder/External Form Connector	●				
Website SEO Auditing with Competitor Comparison	●				
Webinar and Event Management	●				
Drag and Drop Email Marketing Builder	●				
Email Best Practices Templates	●				
Single Factor and Multi-factor A/B Email Testing	●				
Email Rendering and Preview Analysis Across Devices	●				
Advanced Email Spam Diagnostics	●				
Unlimited Lead & Account Scoring Profiles	●				
Dynamic List Segmentation (with Sell)	●				
Event-based Segmentation	●				
Campaign Insights Dashboards	●				
Pre-built Reports	●				
Custom Reporting	●				
Advanced Analytics and Reporting	●				
Interactive Drill-through Reporting Dashboards	●				
Scheduled Reports	●				
Notification Management	●				
Lead / Contact Interaction Listener	●				
Support for Custom Fields	●				
User Roles and permissions	●				
Import Wizard	●				

	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Web Service REST API	●				
Native CRM Integrations (SugarCRM, Salesforce, Dynamics, Bullhorn, Sage, NetSuite, Infor) SSL Certificate	●				
Custom URLs	●				
Pages and Forms Dashboard	●				
Trigger Campaigns	●				
Dedicated IP Address	$				

BUSINESS PROCESS MANAGEMENT
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Business Process Email Template Designer		●	●	●	●
Business Process Rules Designer		●	●	●	●
Business Process Visual Designer		●	●	●	●
Process Execution and Monitoring		●	●	●	●

MOBILE
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Administration and Customization		●	●	●	●
Native iOS and Android Applications		●	●	●	●
Collaboration Comment Log		●	●	●	●
Custom Modules and Fields		●	●	●	●
Dark Mode		●	●	●	●
Mobile Calendar		●	●	●	●
Mobile Studio: No-Code Custom Mobile Layouts		●	●	●	●
Oaline Access		●	●	●	●
Always oa-line mode		●	●	●	●
One-click multiple attachments support		●	●	●	●
Push Notifications		●	●	●	●
Purchase History		●	●	●	●
Field level logic formulas		●	●	●	●

REPORTING
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Advanced Graph and Chart Support	●	●	●	●	●
Customizable Dashboards and Homepage	●	●	●	●	●
Custom Report Editor	●	●	●	●	●
Read-only Report Access	●	●	●	●	●
Scheduled Reports	●	●	●	●	●
Advanced Reporting (SQL based)	●	●	●	●	●
Matrix Reports		●	●	●	●

COMMUNICATION
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Customizable Email Templates	●	●	●	●	●
Email Management, Archiving, and Email Templates	●	●	●	●	●
CTI Connectors		●	●	●	●
SMS		●	●	●	●

ADMINISTRATION CAPABILITIES
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Rest API – Third-party integrations	●	●	●	●	●
Module Builder – No-Code Custom Modules		●	●	●	●
Studio – No-Code Custom Fields, Relationships, and Logic		●	●	●	●
Reminders, Alerts, and Pop-ups		●	●	●	●
Shared Calendar		●	●	●	●
Employee Directory		●	●	●	●
Calculated Fields		●	●	●	●
Customizable Home Page		●	●	●	●
Multiple Dashboards on Homepage		●	●	●	●
Role-based-views Configuration for Admin		●	●	●	●
Web Services SOAP API		●	●	●	●
Project Management		●	●	●	●

INTERNATIONALIZATION
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Multi-Language Support		●	●	●	●
Multi-Currency Support		●	●	●	●
Right-to-Left Support		●	●	●	●

CONNECTORS
	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Google Apps (Google Drive, Google Contacts)		●	●	●	●
Microsoft Word and Excel (WPI/EPI plugins)		●	●	●	●
Microsoft SharePoint		●	●	●	●
Exchange, Yahoo, and other IMAP Mail		●	●	●	●
Salesforce CRM	●				
InforCRM	●				
Microsoft Dynamics	●				
NetSuite	●				
Sage	●				
Bullhorn	●				

	Market	Serve	Sell Premier	Sell Advanced	Enterprise
Google Analytics & Google Ads & Paid Search	●				
SEO Audit Tool	●				
Webinar Platforms (GoTo Webinar, WebEx)	●				
Advanced Reporting & Analytics (Looker)	●				
ADD-ONS					
SugarOutfitters: 3rd Party Applications Marketplace	●	●	●	●	●
Guided Selling		$	●	$	$
Data Enrichment and News Feed		$	●	$	$
Mail and Calendar Integration (Outlook & Gmail)		$	●	$	$
Geo Mapping		$	●	$	$
Sugar Connector for LinkedIn Sales Navigator		$	$	$	$
Sugar Connector for Slack		$	$	$	$
Sugar Integrate: Pre-built API access with Xpress Docs, HubSpot, Zendesk, SalesLoft, Acuity, Marketo, Shopify, Conversica		$	$	$	$
Social Media Management	$	$	$	$	$
Social Media Amplification	$	$	$	$	$
Additional Sandboxes	$	$	$	$	
SECURITY					
Access Control by User	●	●	●	●	●
Compliance (SOC2 Type2)	●	●	●	●	
Access Control by Team		●	●	●	●
Access Control by Role		●	●	●	●
Advanced Password Management		●	●	●	●
LDAP / Microsoft Active Directory		●	●	●	●
Single Sign-on (SAML)		●	●	●	●
Multi-Factor Authentication	●	●	●	●	
Session Timeout Management		●	●	●	
User-Impersonation for admins		●	●	●	
DATA MANAGEMENT AND BACKUP					
Data Import	●	●	●	●	●
Relational Database Backup	●	●	●	●	●
Isolation of Customer Data	●	●	●	●	●
Automated Secure Backups		●	●	●	
Support for MySQL Database					●
Support for Microsoft SQL Server					●
Support for Oracle Database					●
Support for DB2 Database					●
Full Access to Database					●
SUGARCLOUD					
Daily Automated Secure Backups	●	●	●	●	
Compliance (SOC2 Type2)	●	●	●	●	
Connectors Framework	●	●	●	●	
Data Encryption at Rest and in Transit	●	●	●	●	
Disaster Recovery	●	●	●	●	
Operations - 24/7 Monitoring	●	●	●	●	
Performance Optimization and Database Tuning	●	●	●	●	
Products Availability Portal	●	●	●	●	
Rest API - Third-party integrations	●	●	●	●	
Managed Storage	●	●	●	●	
Web Services REST API	●	●	●	●	
Sandboxes	$	●	●	●	

KEY: $ | Additional subscription fees apply, contact your SugarCRM representative for more information

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow @SugarCRM.

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