sugarcrm

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	Sell Standard	Sell Essentials	Enterprise	Enterprise+
Deployment	SugarCloud	SugarCloud	SugarCloud	SugarCloud	SugarCloud	SugarCloud	On-Premises	On-Premises
Release Schedule	Monthly	Quarterly	Quarterly	Quarterly	Quarterly	Quarterly	Annual	Annual
SALES								
Account Management	●	●	●	●	●	●	●	●
Contact Management	●	●	●	●	●	●	●	●
Personalized Dashboards and Homepage	●	●	●	●	●	●	●	●
Lead Management and Routing	●		●	●	●	●	●	●
Opportunity Management	●		●	●	●	●	●	●
Sales Email Campaigns	●		●	●	●	●	●	●
Escalation Management		●	●	●	●	●	●	●
Product Catalog, Categories, and Types		●	●	●	●	●	●	●
Activity Management (meetings, calls, tasks, etc.)		●	●	●	●	●	●	●
Contracts		●	●	●	●	●	●	●
Forecasting			●	●	●		●	●
Pipeline Analytics			●	●	●		●	●
Lead Conversion			●	●	●	●	●	●
Lead response Sales Centers for SLA			●	●	●	●	●	●
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			●	●	●	●	●	●
Customer Purchase History Tracking		●	●	●	●	●	●	●
Product-Level Purchase Analysis		●	●	●	●	●	●	●
Omnichannel Customer and Prospect Engagement		$	$	$	$			
Timeline of Customer & Prospect Activities		●	●	●	●	●	●	●
Active Subscription & Purchase History Dashlets		●	●	●	●	●	●	●
Coterminous Add-ons			●	●	●	●	●	●
Automated Renewal Pipeline Creation			●	●	●	●	●	●
Sales Console			●	●	●	●	●	●
Enhanced Forecasting			●					
Focus Drawer for 360 View of Related Sugar Records		●	●	●	●	●	●	●
Guided Selling, powered by sales-i		$	$	$	$		$	$
Predictive Intent / Account-Based Marketing			$	$	$		$	$
Smart Guides		$	●	$	$		$	●
Mail and Calendar Integration (Outlook & Gmail)		$	●	●	$		$	●
LinkedIn Sales Navigator Integration			●					●
3rd-Party Document Storage Connectors			●	●	●		●	●
Customizable Email Templates	●	●	●	●	●	●	●	●
SMS	$	$	$	$	$		$	$
Employee Directory		●	●	●	●	●	●	●

	Market	Serve	Sell Premier	Sell Advanced	Sell Standard	Sell Essentials	Enterprise	Enterprise+
Calculated Fields		•	•	•	•	•	•	•
Project Management		•	•	•	•	•	•	•
Doc Merge Document Personalization		•	•	•	•	•	•	•
Account- Based Marketing			$	$	$			
Revenue Enablement			$	$	$			
Revenue Intelligence: Cross-Sell/Upsell			$	$	$		$	$
Content Management **			•	•	•		•	•
Sales Engagement & Virtual Deal Rooms			$	$	$		$	$
CPQ Functionality**			$	$	$		$	$
Sales Intelligence Tool			$	$	$		$	$
Intelligent Account Management**			•	•	•		•	•
Data Enrichment & Newsfeed			•					•
SERVICE								
Account Management		•	•	•	•	•	•	•
Contact Management		•	•	•	•	•	•	•
Activity Management (Meetings, calls, tasks, etc.)		•	•	•	•	•	•	•
Knowledge Management		•	•	•			•	•
Team Collaboration for Service		•	•	•			•	•
Basic Case Management		•	•	•			•	•
Bug and Feature Request Management		•	•	•			•	•
Service Reports		•	•	•			•	•
Timeline Dashlet		•	•	•	•	•	•	•
Omnichannel Engagement		$	$	$	$			
Doc Merge			•	•	•		•	•
Active Subscription and Purchase History Dashlets			•	•	•		•	•
Business Centers for Response SLA Management			•	•	•		•	•
Self-Service Center								
SLA Management Reports							•	•
Case Time-to-Resolution Analytics							•	•
Workflows for Common Service Processes		•					•	•
Service Console for Agents		•					•	•
Service Console Metrics – Queues		•					•	•
Advanced Case Automation		•					•	•
Advanced Case Management Reports		•					•	•
Agent Performance Analytics		•					•	•
Mail and Calendar Integration (Outlook & Gmail)		$	•	•			$	•
Customizable Email Templates	•	•	•	•			•	•
Email Management, Archiving, and Email Templates	•	•	•	•			•	•
Service Insights Reports with Time-Based Comparisons		•						
SMS Support	$	$	$	$			$	$
Solution Status Portal	•	•	•	•		•		
MARKETING								
Activity Management (Tasks)	•		•	•	•	•	•	•
Convert Lead Form	•		•	•	•	•	•	•
Campaign Wizard	•		•	•	•	•	•	•
Email Marketing	•		•	$	$	$	•	•
Newsletter Management	•		•	•	•	•	•	•
Drip Campaigns	•							
Dynamic Email Content	•							
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	•							
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	•							
Lead / Contact Interaction Listener	•							
Import Wizard	•							

	Market	Serve	Sell Premier	Sell Advanced	Sell Standard	Sell Essentials	Enterprise	Enterprise+
Custom URLs	●							
Pages and Forms Dashboard	●							
Trigger Campaigns	●							
Dedicated IP Address	$							
Google Analytics & Google Ads & Paid Search Integration	●							
SEO Audit Tool	●							
Webinar Platforms (GoTo Webinar, WebEx) Integration	●							
Social Media Management	$							
Social Media Amplification	$							
INTEGRATIONS								
Pre-Built Integration Templates for 3rd-Party Solutions (e.g., CRM, marketing automation, service, and industry-specific solutions)	●	●	●	●	●		●	●
Connectors Framework	●	●	●	●	●			
Mail and Calendar connector (Outlook & Gmail)		$	●	●	$		$	●
Google Drive connector		●	●	●	●		●	●
Dropbox connector		●	●	●	●		●	●
DocuSign connector		●	●	●	●		●	●
Microsoft OneDrive connector		●	●	●	●		●	●
SharePoint connector		●	●	●	●		●	●
Foundry Triblio connector		$	$	$	$			
Mediafly connector		$	$	$	$		$	$
SalesLoft connector		$	$	$	$		$	$
Zapier connector		$	$	$	$		$	$
Zoominfo connector		$	$	$	$		$	●
Slack connector		$	$	$	$		●	●
ERP integrations (e.g. SAP, Sage, EPICOR, SYSPRO & more)		●	●	●	●		●	●
Amazon Connect for chat, telephony & sentiment analysis		$	$	$	$			
3rd-Party Marketing Automation Solutions (HubSpot, MailChimp)			●	●	●		●	●
Computer Telephony Integration (CTI) Connectors		●	●	●	●		●	●
Support for MySQL Database							●	●
Support for Microsoft SQL Server							●	●
Support for Oracle Database							●	●
Exchange, Yahoo, and other IMAP Mail Integration Connector			●					●
Google Apps (Google Drive, Google Contacts) Connector			●	●	●		●	●
LinkedIn Sales Navigator Connector		$	●					●
IDENTITY MANAGEMENT								
User Impersonation for Admins		●	●	●	●	●		
User Roles & Permissions	●	●	●	●	●	●	●	●
Role-based-views Configuration for Admin		●	●	●	●	●	●	●
Session Timeout Management		●	●	●	●	●	●	●
Access Control by Team		●	●	●	●	●	●	●
Access Control by Role		●	●	●	●	●	●	●
Access Control by User		●	●	●	●	●	●	●
Full Access to Database							●	●
SECURITY								
Automated Secure Backups		●	●	●	●	●		
Advanced Password Management		●	●	●	●	●	●	●
Disaster Recovery	●	●	●	●	●	●		
Relational Database Backup	●	●	●	●	●	●	●	●
Isolation of Customer Data	●	●	●	●	●	●	●	●
WORKFLOWS								
Business Process Email Template Designer		●	●	●	●		●	●
Business Process Rules Designer		●	●	●	●		●	●
Business Process Visual Designer		●	●	●	●		●	●
Process Execution and Monitoring		●	●	●	●		●	●
CONFIGURATION & EXTENSIBILITY								
PDF Template Manager		●	●	●	●	●	●	●
Rest API – Third-party Integrations	●	●	●	●	●		●	●
Studio – No-Code Custom Fields, Relationships, and Logic		●	●	●	●	●	●	●
Module Builder – No-Code Custom Modules		●	●	●	●	●	●	●
Multi-Language Support	●	●	●	●	●	●	●	●
Multi-Currency Support	●	●	●	●	●	●	●	●
Right-to-Left Language Support					●	●	●	●
Module Builder – No-Code Custom Modules		●	●	●	●	●	●	●
Studio – No-Code Custom Fields, Relationships, and Logic		●	●	●	●	●	●	●

	Market	Serve	Sell Premier	Sell Advanced	Sell Standard	Sell Essentials	Enterprise	Enterprise+
Module Builder – No-Code Custom Modules		●	●	●	●	●	●	●
Customizable Home Page for Users		●	●	●	●	●	●	●
Single Sign-On (SAML)		●	●	●	●		●	●
Data Import	●	●	●	●	●		●	●
Multi-Factor Authentication		●	●	●	●		●	
SOC2 Type 2 & ISO27001 Compliance	●	●	●	●	●	●		
Daily Automated Secure Backups	●	●	●	●	●	●		
Data Encryption at Rest and in Transit	●	●	●	●	●	●		
Support for Custom Fields	●	●	●	●	●		●	●
SugarOutfitters: 3rd Party Applications Marketplace	$	$	$	$	$		$	$
MOBILITY								
Desktop CRM Features		●	●	●	●		●	●
No-Code Custom Mobile Layouts in Studio		●	●	●	●		●	●
Native iOS and Android Applications		●	●	●	●		●	●
Mobile SDK		●	●	●	●		●	●
Custom Modules and Fields		●	●	●	●		●	●
SCALABILITY								
Managed Storage***	●	●	●	●	●	●		
Region-Specific Hosting	●	●	●	●	●	●		
Premium Cloud: Advanced Scalability		$	$	$	$			
ANALYTICS								
Out-of-the-Box Reports	●	●	●	●	●	●	●	●
Custom Report Editor	●	●	●	●	●	●	●	●
Read-only Report Access	●	●	●	●	●	●	●	●
Scheduled Reports	●	●	●	●	●	●	●	●
Advanced Reporting (SQL based)	●	●	●	●	●	●	●	●
Dashboard Filtering		●	●	●	●	●	●	●
Advanced Reporting & Analytics (Looker)	●							
Campaign Insights Dashboards	●							
Interactive Drill-through Reporting Dashboards	●							
Notifications & Notification Management	●		$	$	$			
Role-Specific Dashboard & Reporting Templates		●	●	●	●		●	●
INTELLIGENCE								
Enhanced Forecasting with Time-Based Comparisons		●	●					
Purchase Insights Reports			$	$	$		$	$
Top Selling Products Analysis			$	$	$		$	$
Churn Risk Analysis			$	$	$		$	$
White Space Analysis			$	$	$		$	$
Time-Aware Data Insights		●	●	●	●			
Service Insights Reports with Time-Based Comparisons		●						
Lead Analysis, Scoring & Prioritization	$		$	$				
Opportunity Closed-Won Predictions			$	$				
Sentiment Analysis		$	$	$				
Case Summarization		$	$	$				
Account & Opportunity Summarization		$	$	$				
Next Best Action		$	$	$				
AI-Driven Account Management			$	$	$		$	$
Revenue Intelligence: Cross-Sell/Upsell			$	$	$		$	$
Intelligent ERP Data Analysis			$	$	$		$	$

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

*This capability is supported by mobile when activated in the desktop version.
**This capability is available both natively in the SugarCRM platform and augmented through paid 3rd-party solutions.
***The subscription fee includes an allotted quantity of managed storage. Additional storage capacity may be procured at an upcharge.

About SugarCRM

SugarCRM is a CRM software that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence so they can achieve a real-time, reliable view of each customer. Sugar's platform provides leading technology in the sales automation, marketing automation, and customer service fields with one goal in mind: to make the hard things easier. Thousands of companies in over 120 countries rely on Sugar by letting the platform do the work. Headquartered in the San Francisco Bay Area, Sugar is backed by Accel-KKR.

For more information about SugarCRM, visit www.sugarcrm.com.

sugarcrm | Let the platform do the work

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