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	Enterprise	Enterprise+
Deployment	SugarCloud	SugarCloud	SugarCloud	SugarCloud	On-Premises	On-Premises
Release Schedule	Monthly	Quarterly	Quarterly	Quarterly	Annual	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		•	•	•	•	•
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		•	•	•		
AI – Sentiment Analysis		•	•	•		
Timeline of Customer & Prospect Activities		•	•	•	•	•
Active Subscription & Purchase History Dashlets		•	•	•	•	•
Coterminous Add-ons			•	•	•	•
Automated Renewal Pipeline Creation			•	•	•	•
Sales Console			•	•	•	•
AI - Lead Analysis, Scoring & Prioritization	•		•	•		
AI - Ideal Company Profile (ICP)			•	•		
AI - Opportunities Closed-Won Predictions			•	•		
Enhanced Forecasting			•			
Focus Drawer for 360 View of Related Sugar Records		•	•	•	•	•

	Market	Serve	Sell Premier	Sell Advanced	Enterprise	Enterprise+
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		●	●	●		
AI – Sentiment Analysis		●	●	●		
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		●			●	●
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	●					
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	●					
Web Service REST API	●					
Custom URLs	●					
Pages and Forms Dashboard	●					
Trigger Campaigns	●					
Dedicated IP Address	$					

	Market	Serve	Sell Premier	Sell Advanced	Enterprise	Enterprise+
BUSINESS PROCESS MANAGEMENT						
Business Process Email Template Designer		●	●	●	●	●
Business Process Rules Designer		●	●	●	●	●
Business Process Visual Designer		●	●	●	●	●
Process Execution and Monitoring		●	●	●	●	●
SUGARCRM MOBILE APP						
Administration and Customization		●	●	●	●	●
Native iOS and Android Applications		●	●	●	●	●
Collaboration Comment Log		●	●	●	●	●
Custom Modules and Fields		●	●	●	●	●
CallerID Support		●	●	●	●	●
Integration with DocuSign, OneDrive, Dropbox, and Google Drive		●	●	●	●	●
Dark Mode		●	●	●	●	●
Mobile Calendar & Meeting Support		●	●	●	●	●
Guided Selling*		●	●	●	●	●
Mobile Studio: No-Code Custom Mobile Layouts		●	●	●	●	●
Offline Access		●	●	●	●	●
Doc Merge for Mobile		●	●	●	●	●
Always Offline Mode		●	●	●	●	●
One-Click Multiple Attachments Support		●	●	●	●	●
Geo Mapping*		●	●	●	●	●
Push Notifications		●	●	●	●	●
Purchase History		●	●	●	●	●
Field Level Logic Formulas		●	●	●	●	●
REPORTING						
Out-of-the-Box Reports	●	●	●	●	●	●
Custom Report Editor	●	●	●	●	●	●
Read-only Report Access	●	●	●	●	●	●
Scheduled Reports	●	●	●	●	●	●
Advanced Reporting (SQL based)	●	●	●	●	●	●
Dashboard Filtering		●	●	●	●	●
COMMUNICATION						
Customizable Email Templates	●	●	●	●	●	●
Email Management, Archiving, and Email Templates	●	●	●	●	●	●
CTI Connectors		●	●	●	●	●
SMS	$	$	$	$	$	$
ADMINISTRATION CAPABILITIES						
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						
Multi-Language Support	●	●	●	●	●	●
Multi-Currency Support	●	●	●	●	●	●
Right-to-Left Support		●	●	●	●	●
EXTERNAL CONNECTORS & INTEGRATIONS						
Google Apps (Google Drive, Google Contacts)		●	●	●	●	●
Microsoft Word and Excel Plug-Ins		●	●	●	●	●
Exchange, Yahoo, and other IMAP Mail		●	●	●	●	●
Salesforce CRM	●					
InforCRM	●					
Microsoft Dynamics	●					
NetSuite	●					
Sage	●					
Bullhorn	●					
Google Analytics & Google Ads & Paid Search	●					
SEO Audit Tool	●					
Webinar Platforms (GoTo Webinar, WebEx)	●					
Advanced Reporting & Analytics (Looker)	●					
SUGAR-PROVIDED CAPABILITIES						
SugarOutfitters: 3rd Party Applications Marketplace	$	$	$	$	$	$
Guided Selling		$	●	$	$	●

* This capability is supported by mobile when activated in the desktop version.

	Market	Serve	Sell Premier	Sell Advanced	Enterprise	Enterprise+
Data Enrichment and News Feed		$	●			●
Mail and Calendar Integration (Outlook & Gmail)		$	●	●	$	●
Geo Mapping		$	●			●
Sugar Connector for LinkedIn Sales Navigator		$	●			●
Pre-Built Integration Templates to Industry-Leading Solutions		$	$	$	$	$
Social Media Management	$		$	$		
Social Media Amplification	$		$	$		
Account-Based Advertising			$	$		
Account-Based Web Personalization			$	$		
Sales Engagement & Virtual Deal Rooms			$	$		
CPQ Functionality			$	$		
Sales Intelligence Tool			$	$		
Buyer Intent			$	$		
Additional Sandboxes	$	$	$	$		
DOCUMENT-RELATED INTEGRATIONS						
Google Drive		●	●	●	●	●
Dropbox		●	●	●	●	●
DocuSign		●	●	●	●	●
Doc Merge Document Personalization		●	●	●	●	●
Microsoft OneDrive		●	●	●	●	●
Microsoft SharePoint		●	●	●		
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	●	●	●	●		
Solution Status Portal	●	●	●	●		
Rest API - Third-party Integrations	●	●	●	●		
Managed Storage	●	●	●	●		
Web Services REST API	●	●	●	●		

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

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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