

Sage 200 Customer Relationship Management (CRM) Comparison Datasheet

Sage offer CRM for sale both as a standalone product and as part of Sage 200. Sage 200 CRM is only available in the on premise version of Sage 200 2013. It is important to note that that there are

a number of differences between the integrated Sage 200 CRM product and the standalone Sage CRM offering. Please ensure you highlight these differences when positioning CRM to customers:

Sage CRM	Sage 200 CRM
Ships version 7.2 patch D	Ships version 7.2 patch C from the launch of Sage 200 2013 Release 2 and incorporates all fixes
Sales Tracker and Sales Lite mobile apps and Sage CRM for tablets	While the Sage Tracker and Sales Lite mobile apps are unsupported on Sage 200 at this time, we aim to support them in the near future.
*CRM service packs released quarterly	Sage 200 CRM service packs released in line with relevant Sage 200 service packs and releases
Inaport available at extra cost	Inaport not available
CRM marketing groups	<p>Following customer and Business Partner feedback we have introduced the ability to create groups based on products purchased.</p> <p>Customers can now create groups within a specified date range based on products purchased, returned or quoted for.</p> <p>Allows customers to quickly and easily create a marketing group and run campaigns based on the purchase history of customers.</p> <p>Improved UI and customer experience with the introduction of new and enhanced functionality.</p> <p>Increased flexibility and efficiency</p>
PDA license option available	<p>Cross browser support</p> <p>CRM v7.2 introduced a new theme specifically for iPad, however due to the nature of the integration between Sage 200 and CRM we are unable to support the iPad specific theme. We recommend customers use a tablet which uses one of the supported browsers for Sage 200 CRM to view Sage 200 CRM on a tablet.</p> <p>Allows users to access Sage 200 CRM via a secure connection using a pure play browser.</p> <p>Anytime, anywhere access using a tablet running a supported web browser**</p>
Standalone quotes and orders	Standalone quotes and orders not available (replaced by Sage 200 web quotes & orders)
SQL Server and Oracle database supported	Oracle database not supported



Sage CRM	Sage 200 CRM
<p>Will require separate log on</p>	<p>Single Sign On</p> <p>Customers now have only one log on which automatically handles authentication and authorisation, allowing customers to access the relevant areas of the product according to their permissions.</p> <p>On premise customers can now automatically logon to Sage 200 using their Windows ID.</p> <p>Note: Sage 200 Online customers credentials are authenticated using Sage ID and they can have one set of credentials for both their Desktop and Web User.</p> <p>Requires an installation of full Sage 200 Financials & Commercials Client for every CRM user** for full Quote/Order functionality.</p> <p>Requires installation of Sage 200 form launching application for every CRM user to allow full Quote/Order functionality.</p>

* Please note that the Sage CRM quarterly service packs should be applied to Sage CRM only, and not to the Sage 200 CRM product. Sage 200 CRM service packs are released independently to those for the standalone product.

** Please note that Sage CRM for tablets is not available, which means that the User Interface will not necessarily be optimised for tablets but it can still be accessed via a browser.

*** Please note that this does not count as one of your Sage 200 concurrent user licenses

Third party applications

Please contact the relevant 3rd party developer for information about any third party applications that integrate with Sage CRM; as Sage does not sell or support these applications direct either with standalone CRM or Sage 200 CRM.