

Compare versions with Maximizer CRM 12: Winter 2012

Group and Enterprise Editions



The Winter release of Maximizer CRM 12 continues to build on the theme of enhanced performance, usability and productivity while maintaining Maximizer's position in the market as a simple and easy to use CRM for small to medium businesses and enterprise organisations.

To be successful your sales, customer service and marketing teams need access to critical customer information – anywhere and anytime.

The Maximizer CRM 12 Winter 2012 release speaks to this by providing enhancements and new features that makes it easier to access information from all web enabled devices such as smartphones and tablets, more

integrative features with Microsoft Office® applications, and overall access and usability improvements for web and on-premise.

The following chart provides a comprehensive comparison of new and/or enhanced features and capabilities of the Maximizer CRM 12 Winter 2012 release with previous versions of Maximizer.

Key Improvements:

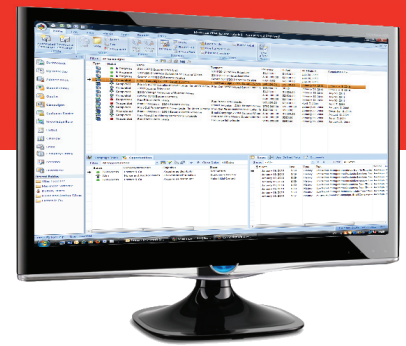
- Mobile access
- Sales
- Marketing
- Customer Service
- Business Productivity
- Customisation
- Usability
- Integration
- MaxMobile for Blackberry

| User features | | Maximizer CRM 12* | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|-------------------|------------------------------------------------------------------------------------|----------------------------------------|------------------|-----------------------|
| Mobile access | Mobile access for tablets (iPad, Android Tablets, Blackberry Playbook) | ✓ | ✓ | ✓ |
| | Mobile access for Smartphones (Phone, Android, Blackberry) | ✓ | | |
| | Automatic Login option for quicker access | New in Maximizer CRM 12 Winter Edition | | |
| | Quick search | ✓ | | |
| | Additional search options (by Cases, by City, by County/State and by Postcode/Zip) | New in Maximizer CRM 12 Winter Edition | | |
| | Customisable column views (for tablets) | ✓ | | |
| | Open and share documents | ✓ | | |
| | Create shortcut on device homescreen | ✓ | | |
| | Shortcut to email/call-in list view (for Smartphones) | ✓ | | |
| | Multi-user appointments | ✓ | | |
| | Manage key fields | ✓ | | |
| | Send emails | ✓ | ✓ | ✓ |
| | Manage appointments | ✓ | ✓ | ✓ |
| Mobile dashboards | ✓ | ✓ | | |

“The software just makes it easy in a fast moving environment for everyone in the organisation to know what is going on and who is doing it”

Graham Inskip, Managing Director, Graham Lloyd Ltd

Monitor opportunities and sales metrics to effectively manage and trigger next steps seamlessly.



| | User features | Maximizer CRM 12* | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|-----------|--------------------------------------------------------------------|-----------------------------------------------------|------------------|-----------------------|
| Sales | Opportunities following tab in address book and hotlist modules | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Better linkage between contacts and associated account manager | ✓ | | |
| | Web lead capture | ✓ ¹ | | |
| | Set relationships between accounts (related entries) | ✓ ¹ | Windows only | Windows only |
| | Capture campaign sources for leads and opportunities | ✓ | | |
| | Sales quota management ² | Improved | ✓ | |
| | Email merge fields | Improved | ✓ | |
| | Email merge templates | Improved | ✓ | |
| Marketing | Sales opportunity monitoring | ✓ | ✓ | |
| | Web lead capture | ✓ ¹ | | |
| | Campaigns return on investment (ROI) management | ✓ | | |
| | Automated campaign templates | ✓ | | |
| | Campaign response metrics | Improved | ✓ | ✓ |
| Service | Built-In marketing reports | Improved | ✓ | |
| | Campaign manager web access | ✓ | ✓ | |
| | Customer service following tab in address book and hotlist modules | New in Maximizer CRM 12 Winter Edition | | |
| | Web links to knowledge base articles | ✓ | | |
| | Notifications | Improved | ✓ | ✓ |
| | Email merge fields | Improved | ✓ | ✓ |

* Maximizer CRM Live automatically updates to the latest features. Maximizer CRM 12 Web Access and Maximizer CRM Live have similar key features.

¹ New for Web Access only.

² Only available in Enterprise Edition and Maximizer CRM Live.



Achieve more on the web than ever before with comprehensive upgrades to Maximizer's web access in Winter 2012.



| | User features | Maximizer CRM 12* | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|-----------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------|------------------|-----------------------|
| Business productivity | New address book interface for improved performance and usability | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | One click to map from contact address | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Quick access for frequently used saved searches and favorite lists | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | New details tab for contact info for hotlist module | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Activities following tab for address book module | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Retrieve address book entries from selected opportunity or customer service cases | New in Maximizer CRM 12 Winter Edition ¹ | Windows only | Windows only |
| | Context video help | ✓ | | |
| | Quick search | ✓ | | |
| | Customer timeline | ✓ ¹ | | |
| | New administrator, new users introductory videos | ✓ ¹ | | |
| | Contacts following window | ✓ ¹ | Windows only | Windows only |
| | Automated sending of outgoing emails to different email inboxes | ✓ ¹ | | |
| | Retrieve opportunities and cases | ✓ ¹ | | |
| | Appointment reminder email messages | Improved in Maximizer CRM 12 Winter Edition | ✓ | ✓ |
| | Quick updates to documents in the company library | ✓ ¹ | | |
| | Improved display of task originator | ✓ ¹ | | |
| | Task dependencies and sequencing in action plan | ✓ | | |
| | Appointment management with accounts (non Maximizer users) | ✓ | | |
| Web links to external documents and social media profiles | ✓ | | | |
| Social media profiling – LinkedIn integration | ✓ | | | |

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"It is difficult to imagine how we would function without this invaluable tool to our business."

Peter Hunt, Director, Multipix Imaging

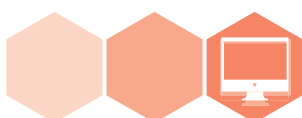
Build your own custom key performance indicators with Maximizer CRM dashboards, to gain instant insight into what matters to your business.



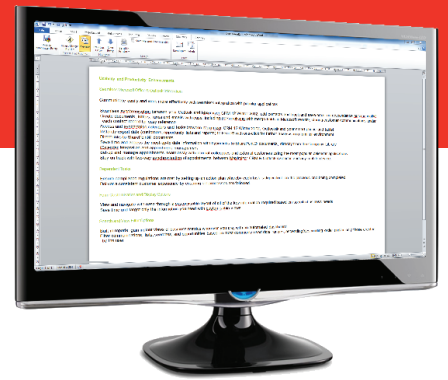
| | User features | Maximizer CRM 12* | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|------------------|-----------------------|
| Customisations | Data access web service Application Programming Interface (API) | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Web following grid integration framework | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Label customisation per user | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Customisable user profile such as email, address and photo | ✓ ¹ | | |
| | Customise which following windows to display | ✓ ¹ | | |
| | Startup preferences | ✓ ¹ | | |
| | Upload photos for accounts | ✓ ¹ | | |
| | Easily switch views between Individual or teams' customisation settings (saved searches, column views, favorite lists) | ✓ | | |
| | Colouring rules | ✓ | ✓ | |
| | Duplicate record checking | Improved | ✓ | ✓ |
| | Expanded key fields customisations and display options | Improved | ✓ | ✓ |
| | Web reports – sales funnel, users' activity, incoming vs. outgoing phone calls, email campaign response metrics, customer service workload reports | ✓ ¹ | | |
| | SQL Server Reporting Services (SSRS) | ✓ ¹ | | |
| | Dashboards | Improved | ✓ | ✓ |
| | Drill down to specific slices of pie and bar graphs in dashboards | ✓ ¹ | | |
| | Single and multi value grouping on dashboards | ✓ | | |
| | Increased number of columns in dashboards list control | ✓ | | |
| Share dashboards via email | ✓ ¹ | | | |
| Simple dashboards creation | ✓ | ✓ | | |

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Save more time than ever before
and get comprehensive access to
your CRM system with Maximizer
CRM 12 Winter 2012



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|------------------------|-------------------------------------------------------------|-------------------------------------------------------|------------------|-----------------------|
| Usability enhancements | Type ahead in list view | ✓ ¹ | | |
| | Right click contextual menu in all modules | ✓ ¹ | | |
| | Keyboard navigation in main list view | ✓ ¹ | | |
| | Easier retrieval of mobile access URL | ✓ ¹ | | |
| | Shortcut for key fields setup | ✓ ¹ | | |
| | Associate column views to saved searches and favorite lists | ✓ | ✓ | |
| | Support for international time zones | ✓ | ✓ | |
| Integrations | Word Add-In | Enhanced look & feel in CRM 12 Winter Edition | ✓ | ✓ |
| | 64-bit Word Add-in | New in Maximizer CRM 12 Winter Edition | | |
| | Instant label & envelope merge in Word | New in Maximizer CRM 12 Winter Edition | | |
| | Word merge | Usability improved in Maximizer CRM 12 Winter Edition | | |
| | Save documents to Maximizer entries during Word merge | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Save any Word document to Maximizer entries | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Outlook Add-In | Enhanced look & feel | ✓ | ✓ |
| | 64-bit Outlook Add-In | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Auto-save emails | ✓ ^{1,2} | | |

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“Maximizer does not have the limitations I know other software packages have. The program is also very flexible because you can add and change parts... We cannot live without this anymore”

Gerwin Eersen, Managing Director, Gflex

| | User features | Maximizer CRM 12* | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|----------------------------------------------|--------------------------------------------------------|--------------------------------------------------------|------------------|-----------------------|
| Integrations | Contacts synchronization between Outlook and Maximizer | ✓ ¹ | | |
| | Saving emails to Maximizer without creating duplicates | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Saving emails to Maximizer contacts | ✓ ¹ | | |
| | Saving emails to Maximizer opportunities | ✓ ¹ | | |
| | Saving emails to Maximizer customer service cases | New in Maximizer CRM 12 Winter Edition ¹ | | |
| | Maximizer and Outlook calendar synching | ✓ ¹ | | |
| MaxMobile | Favorite lists support | ✓ | | |
| | Appointment notifications & support | ✓ | | |
| | Filters for notes and documents | ✓ | | |
| | Organising saved searches and favorite lists | ✓ | | |
| | Real-time, multi-user updates | ✓ | ✓ | |
| | Video, voice and image capture to accounts | ✓ | ✓ | |
| | Edit and manage documents | ✓ | ✓ | |
| | Multi-user appointments | ✓ | ✓ | |
| | Integration with maps | ✓ | ✓ | |
| | Windows 8 support | New in Maximizer CRM 12 Winter Edition | | |
| | Internet Explorer 10 support | New in Maximizer CRM 12 Winter Edition | | |
| | Android 4.0 support for mobile access | New in Maximizer CRM 12 Winter Edition | | |
| | iOS 6 support for mobile access | New in Maximizer CRM 12 Winter Edition | | |
| | MaxMobile | All access licensing (Windows Desktop, Web and Mobile) | ✓ | ✓ |
| Optimised ribbon style interface | | ✓ | ✓ | |
| Support for Internet Explorer & Firefox | | ✓ | ✓ | |
| Improvements to SQL Express storage capacity | | 10GB | 4GB | |

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About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.

Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

Technology Partners



Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

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