



# Which is right for you?

*“Migrating from Contact Management to CRM was easy with Maximizer. Using their technology helps us anticipate the needs of our customers and make informed suggestions to help them meet their financial goals — so not only are they more likely to stay with us, they are also likely to refer more business to us.”*

Chris Carter  
Associate Director & Branch Manager  
ScotiaMcLeod

## **Compare Maximizer™ CRM Editions**

### **Start with Maximizer™ CRM 10 Entrepreneur Edition for Contact Management**

Small business owners have to perform many functions simultaneously — from prospecting and closing sales to servicing customers. Maximize your time, improve customer satisfaction and increase sales with Maximizer CRM 10 Entrepreneur Edition — the leading contact manager for entrepreneurs, home-based businesses, and sales professionals. It works immediately and is easy to configure to your unique business and customer tracking requirements. Manage your contacts, schedule appointments and tasks, synchronise with BlackBerry®, iPhone® Windows Mobile® and Palm® devices, and link with QuickBooks®.

### **Move Up to Maximizer™ CRM 10.5 for Customer Relationship Management**

As your business matures, you need to enable staff collaboration to attract more prospects, increase sales and retain loyal customers. To grow your business and continue to service your existing customers effectively, you need Maximizer CRM. In addition to contact and schedule management, this simple, accessible, adaptable CRM solution brings together Sales, Marketing, and Customer Service & Support in one powerful, integrated suite that is accessible from the corporate office, remotely, through the web, or through mobile devices including BlackBerry, iPhone, Windows Mobile, and Palm. It provides more advanced functionality to enable you to automate and streamline key business processes including:

- Account and contact management
- Time management
- Task management and automation
- Sales force automation (opportunity management)
- Sales forecasting
- Territory management
- Lead management
- Marketing automation
- Email marketing
- Customer service & support management
- Outlook & Exchange synchronisation
- Accounting integration (Intuit QuickBooks, Microsoft Dynamics GP)
- Advanced reporting & dashboard metrics
- Partner relationship management
- Customer self-service
- Workflow automation\*
- eBusiness

## Compare Maximizer CRM Editions

|                                                                                                     | Maximizer CRM Editions                   |                                                   |                                        |                                       |
|-----------------------------------------------------------------------------------------------------|------------------------------------------|---------------------------------------------------|----------------------------------------|---------------------------------------|
| USER FEATURES                                                                                       | Enterprise Edition                       | Professional Edition                              | Group Edition                          | Entrepreneur Edition (ContactManager) |
| Who it's for                                                                                        | Advanced CRM for medium-sized businesses | Full-featured CRM for small and medium businesses | Full-featured CRM for small businesses | Contact manager for entrepreneurs     |
| Minimum # of Users                                                                                  | 10                                       | 5                                                 | 1                                      | 1                                     |
| Maximum # of Users                                                                                  | Unlimited                                | Unlimited                                         | 15                                     | 10                                    |
| Maintenance Program                                                                                 | Required                                 | Required                                          | Optional                               | Optional                              |
| Technical Support                                                                                   | Priority support included                | Priority support included                         | Installation support included          | Installation support included         |
| Access Options                                                                                      |                                          |                                                   |                                        |                                       |
| CRM for iPhone                                                                                      | Wireless Web Access                      | Wireless Web Access                               | Wireless Web Access                    |                                       |
| CRM for BlackBerry                                                                                  | MaxMobile                                | MaxMobile                                         | MaxMobile                              | MaxMobile Lite                        |
| CRM for Windows Mobile                                                                              | MaxMobile                                | MaxMobile                                         | MaxMobile                              | MaxMobile Lite                        |
| Web Access                                                                                          | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Windows Desktop Access                                                                              | ✓                                        | ✓                                                 | ✓                                      | ✓                                     |
| Remote Synchronisation                                                                              | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Wireless Synchronisation                                                                            | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Wireless Web Access                                                                                 | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Palm OS Synchronisation                                                                             | MaxLink                                  | MaxLink                                           | MaxLink                                | MaxLink                               |
| Sales                                                                                               |                                          |                                                   |                                        |                                       |
| Sales Force Automation                                                                              | Advanced <sup>i</sup>                    | Standard                                          | Standard                               | Basic                                 |
| Sales Executive Dashboard                                                                           | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Sales funnel reports                                                                                | ✓                                        | ✓                                                 | ✓                                      | ✓                                     |
| Lead Summary reports                                                                                | ✓                                        | ✓                                                 | ✓                                      |                                       |
| On-demand sales coaching                                                                            | Add-on                                   | Add-on                                            | Add-on                                 | Add-on                                |
| Opportunity management                                                                              | Advanced                                 | Advanced                                          | Advanced                               | Basic                                 |
| Sales Action Plans                                                                                  | ✓                                        | ✓                                                 | ✓                                      | ✓                                     |
| Territory management                                                                                | ✓                                        |                                                   |                                        |                                       |
| Opportunity management                                                                              | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals* | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Account management                                                                                  | ✓                                        | ✓                                                 | ✓                                      | ✓                                     |
| Interactive organisational charts                                                                   | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Quote management                                                                                    | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Partner Relationship Management                                                                     | Add-on                                   | Add-on                                            | Add-on                                 |                                       |
| Lead management and routing                                                                         | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Sales forecasting                                                                                   | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Sales process methodology                                                                           | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Marketing                                                                                           |                                          |                                                   |                                        |                                       |
| Marketing Automation                                                                                | Advanced <sup>ii</sup>                   | Standard                                          | Standard                               |                                       |
| Email campaign respondent lists                                                                     | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Campaign ROI calculator                                                                             | ✓                                        | ✓                                                 | ✓                                      |                                       |
| Lead Summary reports                                                                                | ✓                                        | ✓                                                 | ✓                                      |                                       |

|                                                                                              | Maximizer CRM Editions  |                      |               |                                       |
|----------------------------------------------------------------------------------------------|-------------------------|----------------------|---------------|---------------------------------------|
| USER FEATURES                                                                                | Enterprise Edition      | Professional Edition | Group Edition | Entrepreneur Edition (ContactManager) |
| Marketing Action Plans (project management)                                                  | ✓                       | ✓                    | ✓             |                                       |
| Automatic campaign subscriber removal*                                                       | ✓                       | ✓                    | ✓             |                                       |
| Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns.*   | ✓                       | ✓                    | ✓             |                                       |
| Automated email campaigns                                                                    | ✓                       | ✓                    | ✓             |                                       |
| Automated fax and print campaigns                                                            | ✓                       |                      |               |                                       |
| Campaign management                                                                          | ✓                       | ✓                    | ✓             |                                       |
| Do-not-solicit enforced by system                                                            | ✓                       | ✓                    | ✓             |                                       |
| Email monitoring and automatic replies *                                                     | ✓                       | ✓                    | ✓             |                                       |
| Campaign failure alerts                                                                      | ✓                       | ✓                    | ✓             |                                       |
| Web lead capture                                                                             | ✓                       | ✓                    | ✓             |                                       |
| Customer segmenting with user fields                                                         | ✓                       | ✓                    | ✓             | ✓                                     |
| List management                                                                              | ✓                       | ✓                    | ✓             | ✓                                     |
| Customer Service & Support                                                                   |                         |                      |               |                                       |
| Customer Service                                                                             | Advanced <sup>iii</sup> | Standard             | Standard      |                                       |
| Customer Service Executive Dashboard                                                         | ✓                       | ✓                    | ✓             |                                       |
| Overdue case, case billing, other reports                                                    | ✓                       | ✓                    | ✓             |                                       |
| Case creation based on incoming email                                                        | ✓                       | ✓                    | ✓             |                                       |
| Case management (routing, queuing)                                                           | ✓                       | ✓                    | ✓             |                                       |
| Case resolution                                                                              | ✓                       | ✓                    | ✓             |                                       |
| Knowledge Base                                                                               | ✓                       | Add-on               | Add-on        |                                       |
| Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes * | ✓                       | ✓                    | ✓             |                                       |
| Email monitoring and automatic replies*                                                      | ✓                       | ✓                    | ✓             |                                       |
| Service billing                                                                              | ✓                       | ✓                    | ✓             |                                       |
| Customer self-service                                                                        | ✓                       | Add-on               | Add-on        |                                       |
| Business Productivity                                                                        |                         |                      |               |                                       |
| On-demand professional coaching                                                              | Add-on                  | Add-on               | Add-on        | Add-on                                |
| Customer & Prospect Action Plans                                                             | ✓                       | ✓                    | ✓             | ✓                                     |
| My Work Day (customisable home page)                                                         | Advanced                | Advanced             | Advanced      | Basic                                 |
| Email, tasks and calendar integration with Outlook                                           | ✓                       | ✓                    | ✓             | ✓                                     |
| Email, tasks and calendar integration with Exchange Server                                   | Add-on                  | Add-on               | Add-on        |                                       |
| Maximizer toolbar in Outlook                                                                 | ✓                       | ✓                    | ✓             | ✓                                     |
| Import/export in standard formats                                                            | ✓                       | ✓                    | ✓             | ✓                                     |
| Support for HTML email                                                                       | ✓                       | ✓                    | ✓             | ✓                                     |
| Industry Packs for High-Tech, Legal, Financial, Real Estate                                  | ✓                       | ✓                    | ✓             | ✓                                     |
| Accounting Link for Dynamics GP (formerly Great Plains)                                      | Add-on                  | Add-on               | Add-on        |                                       |
| Accounting Link for QuickBooks                                                               | Add-on                  | Add-on               | Add-on        | Add-on                                |
| Key user-defined fields                                                                      | ✓                       | ✓                    | ✓             | ✓                                     |
| Categorised and multi-level user-defined fields                                              | ✓                       | ✓                    | ✓             | ✓                                     |
| Mandatory fields                                                                             | ✓                       | ✓                    | ✓             | ✓                                     |
| Database searching with multiple criteria                                                    | ✓                       | ✓                    | ✓             | ✓                                     |

| USER FEATURES                                           | Maximizer CRM Editions |                      |                    |                                       |
|---------------------------------------------------------|------------------------|----------------------|--------------------|---------------------------------------|
|                                                         | Enterprise Edition     | Professional Edition | Group Edition      | Entrepreneur Edition (ContactManager) |
| Duplicate record checking                               | ✓                      | ✓                    | ✓                  | ✓                                     |
| Calendar with product/category tracking                 | ✓                      | ✓                    | ✓                  | ✓                                     |
| Calendar for multi-user collaboration                   | ✓                      | ✓                    | ✓                  | ✓                                     |
| Calendar with resource & location management            | ✓                      | ✓                    | ✓                  | ✓                                     |
| CTI (Computer Telephony) integration                    | ✓                      | ✓                    | ✓                  | ✓                                     |
| Task management                                         | ✓                      | ✓                    | ✓                  | ✓                                     |
| Account notes                                           | ✓                      | ✓                    | ✓                  | ✓                                     |
| Account documents                                       | ✓                      | ✓                    | ✓                  | ✓                                     |
| Company-wide document sharing                           | ✓                      | ✓                    | ✓                  | ✓                                     |
| Letters, faxes with merge fields                        | ✓                      | ✓                    | ✓                  | ✓                                     |
| User configuration of views                             | ✓                      | ✓                    | ✓                  | ✓                                     |
| Business Intelligence                                   |                        |                      |                    |                                       |
| Dashboards                                              | ✓                      | ✓                    | ✓                  |                                       |
| Reports: Crystal                                        | ✓                      | ✓                    | ✓                  | ✓                                     |
| Reports: SQL Reports                                    | ✓                      | ✓                    |                    |                                       |
| Reports: Web                                            | ✓                      | ✓                    |                    |                                       |
| Workflow Automation                                     | KnowledgeSync Lite     | Add-on               | Add-on             |                                       |
| Partner Web Access                                      | Add-on                 | Add-on               | Add-on             |                                       |
| Customer Web Access                                     | ✓                      | Add-on               | Add-on             |                                       |
| Workflow Automation                                     |                        |                      |                    |                                       |
| Business activity monitoring & alerting *               | KnowledgeSync Lite     | Add-on               | Add-on             |                                       |
| Out-of-the-box queries and events to monitor business** | Advanced Event Pak     | Standard Event Pak   | Standard Event Pak |                                       |
| Business process automation*                            | Add-on                 | Add-on               | Add-on             |                                       |
| Automatic report distribution*                          | Add-on                 | Add-on               | Add-on             |                                       |
| Email monitoring and response*                          | Add-on                 | Add-on               | Add-on             |                                       |
| eCommerce, Order Management                             |                        |                      |                    |                                       |
| Quote management                                        | ✓                      | ✓                    | ✓                  |                                       |
| Order management                                        | ✓                      | ✓                    | ✓                  | ✓                                     |
| Customer online order tracking                          | ✓                      | ✓                    | ✓                  |                                       |
| eCommerce site creation                                 | ✓                      | ✓                    | ✓                  | ✓                                     |
| Credit card processing                                  | ✓                      | ✓                    | ✓                  | ✓                                     |
| Product catalog                                         | ✓                      | ✓                    | ✓                  | ✓                                     |
| Architecture, Security & Administration                 |                        |                      |                    |                                       |
| Web services                                            | ✓                      | ✓                    | ✓                  |                                       |
| Meta data layer through interface customisation utility | ✓                      | ✓                    | ✓                  |                                       |
| Customisation Suite                                     | Add-on                 | Add-on               | Add-on             |                                       |
| Integration with Accounting API                         | Add-on                 | Add-on               | Add-on             |                                       |
| Full & Read-Only access settings                        | ✓                      | ✓                    | ✓                  | ✓                                     |
| Field-level security                                    | ✓                      | ✓                    | ✓                  | ✓                                     |
| Role-based security groups                              | ✓                      | ✓                    | ✓                  | ✓                                     |
| Support for Microsoft SMS for installation              | ✓                      | ✓                    | ✓                  | ✓                                     |
| Administrator-controlled Live Update                    | ✓                      | ✓                    | ✓                  |                                       |
| 128-bit cipher public key encryption                    | ✓                      | ✓                    | ✓                  |                                       |
| Administration reports                                  | ✓                      | ✓                    | ✓                  | ✓                                     |

## Technology Partners



## Certified Solution Provider



| USER FEATURES                                          | Maximizer CRM Editions |                      |               |                                       |
|--------------------------------------------------------|------------------------|----------------------|---------------|---------------------------------------|
|                                                        | Enterprise Edition     | Professional Edition | Group Edition | Entrepreneur Edition (ContactManager) |
| Record global editing                                  | ✓                      | ✓                    | ✓             |                                       |
| Windows Authentication Only for SQL Server             | ✓                      | ✓                    |               |                                       |
| Single Sign-On for Windows Desktop Access              | ✓                      | ✓                    |               |                                       |
| Single Sign-on for Web Access                          | ✓                      | ✓                    |               |                                       |
| Database                                               | SQL Server             | SQL Server           | SQL Express   | SQL Express                           |
| <b>Microsoft® Technology Support &amp; Integration</b> |                        |                      |               |                                       |
| Works with Exchange Server                             | Add-on                 | Add-on               | Add-on        |                                       |
| Works with Outlook                                     | ✓                      | ✓                    | ✓             | ✓                                     |
| Works with Excel                                       | ✓                      | ✓                    | ✓             | ✓                                     |
| Works with Word                                        | ✓                      | ✓                    | ✓             | ✓                                     |
| Works with FrontPage                                   | ✓                      | ✓                    | ✓             |                                       |
| Web Access with Internet Explorer                      | Option                 | Option               | Option        |                                       |
| Accounting Link for Dynamics GP                        | Add-on                 | Add-on               | Add-on        |                                       |
| CRM Vista Gadgets                                      | ✓                      | ✓                    | ✓             | ✓                                     |
| Support for SMS for installation                       | ✓                      | ✓                    | ✓             | ✓                                     |
| Built for .NET framework                               | ✓                      | ✓                    | ✓             | ✓                                     |
| Integrates with Virtual Earth™                         | ✓                      | ✓                    | ✓             | ✓                                     |
| Support for SQL Server                                 | ✓                      | ✓                    | SQL Express   | SQL Express                           |

\* Requires Workflow Automation powered by KnowledgeSync; add-on license fee applies; Enterprise Edition includes Workflow Automation Lite.

\*\* Advanced Event Pak includes 116 Queries and 78 Events based on features in Enterprise Edition; Standard Event Pak includes 69 Queries and 29 Events based on features in Group and Professional Editions.

- i. Advanced Sales Force Automation features include territory management and advanced workflow events.
- ii. Advanced Marketing Automation includes print and fax campaign management.
- iii. Advanced Customer Service & Support Management module includes advanced workflow events.

### Why Maximizer CRM 10.5

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through mobile devices, the web and Windows desktop options.
3. **Best value** in its class for full-featured CRM.
4. **Expertise** of 120,000 customers over 20 years with over 1 million licences sold

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimisation of limited resources.

### Visit [www.max.co.uk](http://www.max.co.uk) for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

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