

# Which is right for you?

"Maximizer CRM will fulfill our goal of using one turn-key system to comprehensively manage sales, marketing and customer service efforts."

Zina Oster  
Pacific Northwest Territory Manager  
Colonial Life



**Wizard-Driven Dashboards:** Easy to set up and modify, key performance indicators provide real-time insight into your business.

## Maximizer® CRM Editions

Whether you're a start-up small business in need of CRM, or have hundreds of employees and thousands of customers, Maximizer CRM has the right solution for you. Maximizer CRM adapts to the way you work, and grows as your business grows. Choose from the following editions, as well as several add-on modules and options for the solution that matches your business needs. The right solution will depend on your number of users, access, and feature requirements.

### Compare Maximizer CRM Editions

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Who it's for	Advanced CRM for medium-sized businesses	Full-featured CRM for small businesses	Sales-focused Contact Manager for small to medium-sized businesses	Contact Manager for entrepreneurs & small businesses
Minimum # of Users	1	1	5	1
Maximum # of Users	Unlimited	10	50	5
MaxAdvantage Maintenance (Technical support & upgrade assurance) <sup>1</sup>	Included	Included	Included	Optional
<b>Access Options</b>				
Mobile CRM for smartphones (including iPhone, Google Android, and BlackBerry®) and tablets (including iPad)	Mobile Access	Mobile Access		
MaxMobile CRM for BlackBerry®	✓	✓	✓	✓ <sup>2</sup>
Web Access (including Firefox support)	✓	✓	✓	
Windows Desktop Access	✓	✓	✓	✓
Remote Synchronization	✓			
<b>Sales</b>				
Sales Force Automation	Advanced <sup>3</sup>	Standard	Basic	Basic
Sales Executive Dashboard	✓	✓		
Sales funnel reports	✓	✓	✓	✓
Lead Summary reports	✓	✓		
Opportunity Management	Team and Individual	Team and Individual	Team and Individual	Basic
Opportunity Monitoring (alerts)	✓	✓		
Sales Quota Management	✓			
Sales Action Plan (Project Management)	✓	✓	✓	✓
Email templates with merge fields	✓	✓	✓	✓
Territory Management	✓			

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals*	✓	✓		
Account Management	✓	✓	✓	✓
Interactive organizational charts	✓	✓		
Quote Management	✓	✓		
Partner Relationship Management	Add-on	Add-on		
Lead management and routing	✓	✓		
Sales forecasting	✓	✓		
Sales process methodology	✓	✓		
<b>Marketing</b>				
Automated email campaigns	✓	✓		
Automated fax and print campaigns	✓			
Campaign management	✓	✓		
Marketing Automation	✓	✓		
Email campaign respondent lists	✓	✓		
Campaign ROI calculator	✓	✓		
Lead Summary reports	✓	✓		
Marketing Action Plans (project management)	✓	✓		
Automatic campaign subscriber removal*	✓	✓		
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns*	✓	✓		
Do-not-solicit enforced by system	✓	✓		
Email monitoring and automatic replies*	✓	✓		
Campaign failure alerts	✓	✓		
Web lead capture	✓	✓		
Customer segmenting with user-defined fields	✓	✓	✓	✓
List management	✓	✓	✓	✓
<b>Customer Service &amp; Support</b>				
Customer Service	Advanced <sup>1</sup>	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	✓	✓		
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 portal	Add-on	Add-on		
<b>Business Productivity</b>				
Customer & Prospect Action Plans	✓	✓	✓	✓
My Work Day (customizable home page)	Advanced	Advanced	Standard	Standard

1 MaxAdvantage maintenance included for one full year. Renewal fee after one year at 20% of license MSRP.

2 MaxMobile CRM for BlackBerry is included with Team Edition. MaxMobile CRM for BlackBerry is an add-on product for Entrepreneur Edition with additional license fees. MaxMobile CRM for BlackBerry requires wireless server hardware and Microsoft® Internet Information Services (IIS)

3 Advanced Sales Force Automation features include Territory Management and advanced Workflow events.

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Email, tasks and calendar integration with Outlook®	✓	✓	✓	✓
Email, tasks and calendar integration with Exchange Server	Add-on	Add-on		
Email templates with merge fields	✓	✓	✓	✓
Maximizer toolbar in Outlook®	✓	✓	✓	✓
Import/export in standard formats	✓	✓	✓	✓
Support for HTML email	✓	✓	✓	✓
Industry Packs for High-Tech, Legal, Financial, Real Estate	✓	✓	✓	✓
Key user-defined custom fields	✓	✓	✓	✓
Categorized and multi-level user-defined fields	✓	✓	✓	✓
Mandatory fields	✓	✓	✓	✓
Database searching with multiple criteria	✓	✓	✓	✓
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	✓	✓	✓	✓
<b>Business Intelligence</b>				
Dashboards	✓	✓		
Reports: Crystal	✓	✓	✓	✓
Reports: SQL	✓	✓		
Reports: Web	✓	✓		
Workflow Automation	Add-on	Add-on		
Partner Web Access	Add-on	Add-on		
Customer Web Access	Add-on	Add-on		
<b>Workflow Automation</b>				
Business activity monitoring & alerting*	Add-on	Add-on	Add-on	
Out-of-the-box queries and events to monitor business <sup>5</sup>	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	
<b>Architecture, Security &amp; Administration</b>				
Meta data layer through interface customization utility	✓	✓		
Customization Suite	✓	Add-on		
Integration with Accounting API	Add-on	Add-on		
Full & read-only access settings	✓	✓	✓	✓

4 Advanced Customer Service & Support Management module includes advanced Workflow events.

5 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 Team Editions.

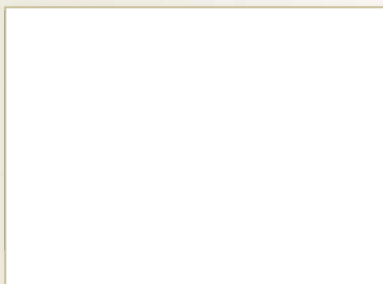
# Maximizer CRM Features

- Account and contact management
- LinkedIn integration
- Time management & iCalendar integration
- Task management and automation
- Sales force automation & forecasting
- Marketing campaign automation & management
- Customer service management
- Microsoft® Office® integration
- Outlook® & Exchange synchronization
- Business intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, Web, Windows desktop, remote

## Technology Partners



## Certified Solution Provider



USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
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	✓	✓	✓	✓
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 Express	SQL Server or SQL Express	SQL Express
<b>Microsoft® Technology Support &amp; Integration</b>				
Works with Exchange Server	Add-on	Add-on		
Works with Outlook®	✓	✓	✓	✓
Works with Excel®	✓	✓	✓	✓
Works with Word®	✓	✓	✓	✓
Works with FrontPage®	✓	✓		
Works with SharePoint® 6	✓	✓		
Web Access with Internet Explorer® and Firefox	✓	✓	✓	
Support for SMS for installation	✓	✓	✓	✓
Built for .NET framework	✓	✓	✓	✓
Integrates with Google® and Bing™ Maps	✓	✓	✓	✓
Support for SQL Server	✓	SQL Express	SQL Express or SQL Server	SQL Express

<sup>6</sup> Requires Customization Suite - available for Maximizer CRM Group and Enterprise editions. For Enterprise edition Customization Suite is included in the user price, for Group edition additional license fees apply.

\* Requires Workflow Automation powered by KnowledgeSync. Additional license fees apply.

## Why Maximizer CRM?

1. **Simple & quick** to deploy, learn, use and maintain.
2. **Access options** through the Web, mobile devices, Windows desktop and remote synchronization.
3. **Value.** Best value for a full-featured CRM, low total cost of ownership.
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

## Visit [www.maximizer.com](http://www.maximizer.com) 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

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

**Maximizer Software**  
Simply Successful CRM

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