



# 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

USER FEATURES	Maximizer CRM Editions			
	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
<b>Access Options</b>				
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
<b>Sales</b>				
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	✓	✓	✓	
<b>Marketing</b>				
Marketing Automation	Advanced <sup>ii</sup>	Standard	Standard	
Email campaign respondent lists	✓	✓	✓	
Campaign ROI calculator	✓	✓	✓	
Lead Summary reports	✓	✓	✓	
Marketing Action Plans (project management)	✓	✓	✓	
Automatic campaign subscriber removal*	✓	✓	✓	

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (ContactManager)
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	✓	✓	✓	✓
<b>Customer Service &amp; Support</b>				
Customer Service	Advance <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	
<b>Business Productivity</b>				
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	✓	✓	✓	✓
Duplicate record checking	✓	✓	✓	✓
Calendar with product/category tracking	✓	✓	✓	✓

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (ContactManager)
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	✓	✓		
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	Add-on	
<b>Workflow Automation</b>				
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	
<b>eCommerce, Order Management</b>				
Quote management	✓	✓	✓	
Order management	✓	✓	✓	✓
Customer online order tracking	✓	✓	✓	
eCommerce site creation	✓	✓	✓	✓
Credit card processing	✓	✓	✓	✓
Product catalog	✓	✓	✓	✓
<b>Architecture, Security &amp; Administration</b>				
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	✓	✓	✓	✓
Record global editing	✓	✓	✓	

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (ContactManager)
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.

### Technology Partners



### Certified Solution Provider



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

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

#### 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

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

**Call: +44 (0)1344 766900**

**Email: [info@max.co.uk](mailto:info@max.co.uk)**

**Web: [www.max.co.uk](http://www.max.co.uk)**

Americas

604-601-8000 phone

604-601-8001 fax

[info@maximizer.com](mailto:info@maximizer.com)

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

Europe, Middle East, Africa

+44 (0) 1344 766900 phone

+44 (0) 1344 766901 fax

[info@max.co.uk](mailto:info@max.co.uk)

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

Australia, New Zealand

+61 (0) 2 9957 2011 phone

+61 (0) 2 9957 2711 fax

[info@maximizer.com.au](mailto:info@maximizer.com.au)

[www.maximizer.com.au](http://www.maximizer.com.au)

Asia

+ (852) 2598 2888 phone

+ (852) 2598 2000 fax

[info@maximizer.com.hk](mailto:info@maximizer.com.hk)

[www.maximizer.com.hk](http://www.maximizer.com.hk)