



Which is right for you?

“Migrating from Maximizer Contact Manager to Maximizer CRM was easy. Using CRM 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

Maximizer™ CRM Editions, Maximizer Contact Manager

Start with Maximizer™ for Contact Management

Small business owners have to perform many functions simultaneously—from prospecting and closing sales to servicing customers. Maximise your time, improve customer satisfaction and increase sales with Maximizer—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 & tasks, synchronise with Palm® and Windows Mobile devices, and even link with QuickBooks®.

Move Up to Maximizer™ CRM for Customer Relationship Management

As your business grows, 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 the 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, Windows Mobile, and Palm. It provides more advanced functionality to enable you to automate and streamline key business processes:

- 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 10			Maximizer 9 Contact Manager
	Enterprise Edition	Professional Edition	Group Edition	
# Users	10 & higher	5 & higher	1 - 15	1 - 5
Anywhere Access				
BlackBerry Access (MaxMobile)	✓ (add-on)	✓ (add-on)	✓ (add-on)	
Windows Mobile Access (MaxMobile)	✓ (add-on)	✓ (add-on)	✓ (add-on)	✓ (add-on)
Windows Desktop Access	✓	✓	✓	✓
Web Access	✓ (option)	✓ (option)	✓ (option)	
Wireless Web Access	✓	✓	✓	
Remote synchronisation	✓	✓	✓	
Palm synchronisation	✓	✓	✓	✓
Sales				
Sales Executive Dashboard	✓	✓	✓	
Sales funnel reports	✓	✓	✓	✓
Lead Summary reports	✓	✓	✓	
On-demand sales coachingxi	✓	✓	✓	
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				
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.**	✓	✓	✓	
Automated email campaigns	✓	✓	✓	
Automated fax and print campaigns	✓			
Campaign management	✓	✓	✓	
Campaign response metrics	✓	✓	✓	
Do-not-solicit enforced by system	✓	✓	✓	
Email monitoring and automatic replies **	✓	✓	✓	
Campaign failure alerts	✓	✓	✓	
Lead capture from website	✓	✓	✓	✓
Customer segmenting with user fields	✓	✓	✓	✓
List management	✓	✓	✓	✓

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Customer Service & Support				
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)	
General Productivity Features				
On-demand professional coachingxi	✓ (add-on)	✓ (add-on)	✓ (add-on)	
Customer & Prospect Action Plans	✓	✓	✓	✓
My Work Day (customisable home page)	Advanced	Advanced	Advanced	Basic
Email, tasks, calendar integration with Outlook	✓	✓	✓	✓
Email, tasks, 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)	✓	✓	✓	
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	✓	✓	✓	
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	✓	✓	✓	✓

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Business Intelligence				
Executive Dashboard with Key Performance Indicators	✓	✓	✓	
Out-of-the-box, pre-formatted reports (Maximizer, Crystal, Microsoft SRS)	✓	✓	✓	Maximizer & Crystal Reports only
Support for Crystal Reports	✓	✓	✓	✓
Support for Crystal Reports Server	✓	✓	✓	
Support for Microsoft SQL Reporting Services (SRS)	✓	✓	✓	
Support for Radius90	✓	✓	✓	
Workflow Automation				
Business activity monitoring & alerting **	KnowledgeSync Lite included	✓ (add-on)	✓ (add-on)	
Out-of-the-box queries and events to monitor business	Over 40 included	With add-on	With add-on	
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)	
Accounting integration out-of-the-box (QuickBooks, Dynamics GP)	✓ (add-on)	✓ (add-on)	✓ (add-on)	QuickBooks only
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	✓	✓	✓	
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	Pervasive
Network Configuration	✓	✓	✓	✓
Support & Maintenance	✓	✓	✓	✓

Maximizer CRM 10 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronisation
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: Windows desktop, web, mobile devices, remote synchronisation

Technology Partners



Certified Solution Provider



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Microsoft® Technology Support & Integration				
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 Database	✓	✓	✓	✓

Why Maximizer CRM 10

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through the web, Windows desktop, and mobile devices.
3. **Best value** in its class for full-featured CRM.

Visit www.max.co.uk for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on features and technology
- Online demonstrations, trial software
- White papers on CRM best practices
- Webinars

Maximizer CRM helps small and medium-sized businesses maximise revenue, maximise satisfaction, and maximise every single day.

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 Simply Successful CRM