



# What's New

Maximizer CRM 10.5 includes new features and key enhancements in the following areas:

1. Mobile CRM
2. Web Access
3. Marketing Automation
4. Business Intelligence
5. Social Networking
6. Business Productivity

## ***Enhanced End-to-End Customer Relationships & Processes with Maximizer CRM 10.5***

At home, in the office, on the road, or on-site with a customer, Maximizer CRM provides end-to-end customer relationship management (CRM) software that empowers you to effectively manage prospects and customers — from the first call, to an order, to a lifetime customer. Simple, accessible and adaptable to meet the needs of small and medium-sized businesses, Maximizer enables your organization to maximize staff performance, customer relationships and revenues.

Now with the addition of new features and enhancements, Maximizer CRM 10.5 makes staying ahead of your competitors easier than ever — no matter what role you play in your organization and with your customers.

### **FOR SALES**

With the latest enhancements to Maximizer Mobile CRM, sales professionals are better equipped to meet the higher demands of prospects and customers — anywhere, anytime. Significantly improved dashboards provide further insight into business performance at a glance.

### **FOR CUSTOMER SERVICE**

Keeping existing customers satisfied is the key to driving repeat business and referrals. Now with the addition of customer service case management through our Wireless Web Access, Maximizer Mobile CRM provides the tools necessary to uphold the highest service and support level standards.

### **FOR MARKETING**

Generating qualified leads requires successfully reaching your target audience and the ability to monitor and measure campaigns. Now with multiple email link tracking, understand what people are responding to with metrics at a glance, adjust tactics and increase your campaign ROI.

The following NEW features and enhancements are included in Maximizer CRM 10.5:

## **Mobile CRM<sup>i</sup>: Reduce downtime, increase customer face time, win more deals**

Leverage the power of CRM on the latest BlackBerry®, Windows Mobile®, iPhone® and Palm® smartphones through the new features and enhancements of Maximizer CRM 10.5.

- Supported on BlackBerry Bold<sup>ii</sup> and iPhone<sup>iii</sup> smartphones
- Direct access to online maps and directions from lead, opportunity, or service case address details
- Log calls, SMS text messages and emails to client records — eliminates the need to update records back at the office
- Increased capacity with Secure Digital (SD) card storage<sup>iv</sup>
- Access to online document library<sup>v</sup> to send brochures, quotes and other documents to customers and prospects on-the-fly, directly from your device
- Improved BlackBerry-like experience with single-click access to information, helping you work faster throughout the day
- Integration with BlackBerry built-in address book and phone to create new records, opportunities and cases, within Maximizer CRM



- Wireless Web Access enables seamless, real-time online access to entire corporate CRM database to look-up records not directly stored on your device
- Improved synchronization<sup>vi</sup> performance and preferences allows calls or emails during scheduled wireless synchronization, and scheduling of synchronization for preferred times of the day

### **Web Access<sup>vii</sup>: Work when and where you want**

Web Access provides sales and service professionals with real-time convenience and flexibility to access Maximizer CRM, outside the office.

- Action Plans now available through Web Access to schedule project or process activities
- Improved integration enables emails to be saved and new records to be easily created from emails
- One-click creation of appointments, tasks and service cases case from an email message
- Call logging saves details and comments of calls made or received
- Global editing enables specific field updates to multiple records including service cases
- Improved calendar features include print preview and legend options
- Personal email templates can be tailored to send professional communications to multiple contacts
- Complete integration with Microsoft Word® performs one-click merge of contact details into documents
- One-click export of contact, task or service case lists to Microsoft Excel®
- Advanced export to Excel supports conditional formatting rules and customized graph styles
- Improved online performance and speed

### **Marketing Automation: Fill your sales pipeline with high-value prospects**

- Performance tracking of up to five separate landing page URLs in your email marketing campaigns to provide insight into which links are getting the best responses, for campaign refinement going forward
- Create and apply email templates for standardized, professional communications to multiple prospects or contacts through Web Access
- Action Plans available through Web Access to schedule lead follow-up on activities

### **Business Intelligence: Develop insightful strategies**

Make informed business decisions based on accurate reporting and intuitive dashboards tailored to the metrics you need to successfully run your business or department.

- Improved dashboard page with easy drag and drop and choice of various indicators to monitor sales and customer service staff performance
- Optimized loading and refreshing of dashboards
- Enables big-picture perspective by combining existing dashboards into one overview specific to each person or each role

### **Social Networking: Leverage the power of the online community**

Tap into collaborative web resources with direct links from Maximizer CRM.

- One-click access to social networking sites including LinkedIn® and Facebook, as well as Google® and other search engines to research your prospects before you make the call
- Build and improve the accuracy of your database with collaborative company and contact lists downloaded from Jigsaw® directly into Maximizer CRM

### **Business Productivity: Increase your efficiency**

- Outlook integration allows creation of customer service and support cases directly from emails and saves them to the relevant record
- Improved Workflow Automation: dynamic alert dashboards that show results of activities, intuitive interface to manage Workflow events, and visual Workflow process and flow charts
- Support for installation of Maximizer CRM on 64-bit<sup>viii</sup> based operating systems for optimized performance and speed

## Compare Your Version to Maximizer CRM 10.5

USER FEATURES	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8	Maximizer Enterprise 7/7.5	Maximizer Enterprise 6.0
<b>Sales</b>						
Dashboard performance	Improved					
Custom dashboard view with drag & drop and choice of various pie charts and graphs	New					
Direct access to LinkedIn®, Facebook search	New					
Direct access to Jigsaw® company and contact lists	New					
Sales Executive Dashboard	✓	Improved	✓			
Sales funnel reports	✓	✓	✓			
Lead Summary reports	✓	✓	✓			
On-demand sales coaching <sup>ix</sup>	✓	New				
Opportunity analysis & pipeline reports	✓	✓	✓	✓		
Sales Action Plans	✓	✓	✓			
Interactive organizational charts	✓	✓	9.5 only			
Opportunity management	✓	✓	✓	✓	✓	✓
Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals**	✓	More	✓	✓		
Account management	✓	✓	✓	✓	✓	✓
Territory management (add-on for Professional and Group Editions)	✓	New				
Quote management	✓	Improved	✓			
Partner Relationship Management	✓	✓	✓	✓	✓	
Lead management and routing	✓	✓	✓	✓		
Sales forecasting	✓	✓	✓	✓	✓	✓
Sales process methodology	✓	✓	✓	✓	✓	✓
<b>Marketing</b>						
Multiple landing page tracking	New					
Email templates in web access	New					
Email campaign respondent lists	✓	✓	✓			
Campaign ROI calculator	✓	✓	✓			
Lead Summary reports	✓	Improved	✓			
Marketing Action Plans (project management)	✓	✓	✓			
Automatic campaign subscriber removal**	✓	✓	✓			
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns.**	✓	More	✓	✓		
Automated email campaigns	✓	✓	✓	✓	✓	
Automated fax and print campaigns	✓	✓	✓	✓	✓	
Campaign management	✓	✓	✓	✓	✓	
Campaign response metrics	✓	Improved	✓	✓		
Do-no-solicit enforced by system	✓	✓	✓	✓		
Email monitoring and automatic replies**	✓	✓	✓	✓		
Campaign failure alerts	✓	✓	✓	✓		
Lead capture from website	✓	Improved	✓	✓	✓	
Customer segmenting with user fields	✓	✓	✓	✓	✓	✓
List management	✓	✓	✓	✓	✓	✓
<b>Customer Service &amp; Support</b>						
Case creation based on incoming email	Improved	✓	✓			
Customer Service Executive Dashboard	✓	✓	✓			
Overdue case, case billing, other reports	✓	✓	✓			

USER FEATURES	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8	Maximizer Enterprise 7/7.5	Maximizer Enterprise 6.0
Case management (routing, queuing)	✓	✓	Improved	✓	v7.5 only	
Case resolution	✓	✓	Improved	✓	v7.5 only	
Knowledge Base (add-on for Professional and Group Editions)	✓	✓	Improved	✓	v7.5 only	
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	✓	✓	✓	✓	✓	
<b>Mobile CRM</b>						
Support for BlackBerry Bold and iPhone	New					
One-click access to maps and directions	New					
Phone / email / SMS logging	New					
Storage of customer data on BlackBerry SD cards	New					
Online document library of brochures and other documents	New					
Customer service case management through Wireless Web Access	New					
Synchronization performance and preferences	Improved					
iPhone support through Wireless Web Access	New					
BlackBerry Access (MaxMobile)	✓	✓				
Windows Mobile Access (MaxMobile)	✓	✓	9.5 only			
Wireless Web Access view / search	Improved	✓	✓	✓	✓	
Remote synchronization	Improved	✓	✓	✓	✓	✓
Palm synchronization	✓	✓	✓	✓	✓	✓
<b>Web Access</b>						
Action Plans	New					
Call logging	New					
Global editing & editing records	New					
Word integration	New					
Export to Excel	New					
Email integration, saving	Improved	✓				
Calendar (appointments, groups)	Improved	✓				
Web Access	Improved	✓	✓	✓	✓	
Wireless Web Access	Improved	✓	✓	✓	✓	
<b>General</b>						
Customer & Prospect Action Plans	✓	✓	✓			
My Work Day (customizable home page)	✓	Improved	✓	✓		
Email, tasks, calendar integration with Outlook	✓	Improved	✓	✓	✓	
Email, tasks, calendar integration with Exchange Server	✓	✓	✓			
Maximizer toolbar in Outlook	✓	Improved	✓			
Import/export in standard formats	✓	✓	✓	✓	✓	✓
Support for HTML email	✓	✓	✓	✓		
Industry Packs for High-Tech, Legal, Financial, Real Estate	✓	✓	✓	✓	✓	✓
Accounting Link for Microsoft Dynamics™ GP (formerly Great Plains)	✓	New				
Accounting Link for QuickBooks®	✓	✓	✓	✓		
Key user-defined fields	✓	✓	✓	✓		

USER FEATURES	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8	Maximizer Enterprise 7/7.5	Maximizer Enterprise 6.0
Categorized and multi-level user-defined fields	✓	✓	✓	✓		
Mandatory fields	✓	✓	✓	✓	✓	
Database searching with multiple criteria	✓	✓	✓	✓		
Duplicate record checking	✓	Improved	✓	✓	✓	
Calendar with product/category tracking	✓	Improved				
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	✓	Improved	✓	✓	✓	✓
<b>Business Intelligence</b>						
Executive Dashboard with Key Performance Indicators	✓	Improved	✓	✓	✓	
Out-of-the-box, pre-formatted reports (Maximizer, Crystal Reports®, Microsoft SRS)	✓	Improved	✓	✓	✓	✓
Support for Crystal Reports	✓	✓	✓	✓		
Support for Crystal Reports Server	✓	✓	✓			
Support for Microsoft SQL Reporting Services (SRS)	✓	✓				
<b>Workflow Automation</b>						
Business activity monitoring & alerting**	✓	More	✓	✓		
Business process automation**	✓	✓	✓	✓		
Automatic report distribution**	✓	✓	✓	✓		
Email monitoring and response**	✓	✓	✓	✓		
<b>eCommerce, Order Management</b>						
Quote management	✓	✓				
Order management	✓	Improved	✓	✓		
Customer online order tracking	✓	✓	✓	✓	✓	
eCommerce site creation	✓	✓	✓	✓	✓	✓
Credit card processing	✓	✓	✓	✓	✓	✓
Product catalog	✓	✓	✓	✓	✓	✓
<b>Architecture, Security &amp; Administration</b>						
Support for 64-bit Microsoft SQL Server® Editions	New					
Support for 64-bit Microsoft® operating system	✓	✓				
Web services	✓	✓				
Meta data layer through interface customization utility	✓	✓				
Customization Suite	Improved	✓	✓	✓	✓	✓
Accounting integration out-of-the-box (QuickBooks®, Dynamics™ GP)	✓	Improved	✓	✓		
Integration with accounting API	✓	✓	✓			
Full & Read-Only access settings	✓	Improved	✓	✓		
Field-level security	✓	Improved				
Role-based security groups	✓	Improved	✓	✓	✓	✓
Support for Microsoft SMS for installation	✓	✓	✓			
Administrator-controlled Live Update	✓	✓	✓			

