



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 Freedom

With customers and prospects being more discerning and budget-conscious than ever, standing out from your competition demands going above and beyond expectations. Maximizer CRM's end-to-end customer relationship management (CRM) software empowers businesses to do more with less, effectively helping your staff manage prospects and customers — from first call, to confirmed order, to lifetime customer.

Now, let your CRM work harder for you in the field with **Maximizer CRM 10.5 Freedom**. Enabling efficient, one-touch access to the critical customer information you need, the intuitive interface allows you to quickly take action to move business forward, service more clients and sell more in less time — without being chained to your desk. Simple, accessible and adaptable to meet the needs of small and medium-sized businesses, Maximizer CRM 10.5 Freedom leverages the power of CRM with the flexibility of mobility — no matter what role you play in your organization.

SALES

With the latest enhancements to Maximizer Mobile CRM, sales professionals and executives are better equipped to meet the higher demands of prospects and customers — anywhere, anytime. Improved dashboards and reports, now accessible on your mobile device, provide instant insight into business performance at a glance.

CUSTOMER SERVICE

Keeping existing customers satisfied is key to driving repeat business and referrals. With the addition of customer service case management through Wireless Web Access, Maximizer Mobile CRM provides the tools necessary for field staff to uphold the highest service and support level standards, maximizing time and efficiency by eliminating paperwork and reporting after service calls.

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 accordingly and increase your campaign ROI.

IT ADMINISTRATORS

Get your mobile workforce up and running, quickly and easily with deployment of MaxMobile to the field with wireless push. Simply push out via an email link for field staff to easily download and install on their mobile devices, even while away from the office.

Mobile CRMⁱ: Reduce downtime, increase customer face time, win more deals

Staying productive in the field demands a CRM solution that will work seamlessly with your smartphone of choice, enhance already powerful features and make it the most efficient and intuitive tool for success on the road. Maximizer CRM 10.5 Freedom will boost your productivity, enabling you to stay better informed, win more deals and get your mobile workforce up and running — all on the latest BlackBerry smartphones. Leverage the power of CRM on the latest smartphones — including BlackBerry®, Windows Mobile®, iPhone®, Nokia, Google G1™ and other devices — through the new features and enhancements of Maximizer CRM 10.5 Freedom.

- Supported on BlackBerry Bold and Stormⁱⁱ smartphones.
- Supported on iPhone, HTC Google G1 and Nokia smartphones through the device's web browserⁱⁱⁱ.

- Gain immediate insight into your business and team performance at a glance with mobile dashboards and reports accessed through your mobile web browserⁱⁱⁱ.
- 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 to minimize administration work back at the office.
- Increased capacity with Secure Digital (SD) card storage^{iv}.
- Access to online document library^v 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.
- New integration with BlackBerry built-in address book, email and phone enables you to create new records, opportunities and cases, or schedule meetings or tasks with a single click into Maximizer CRM — to take immediate action and stay on top of follow-up activities while on the road.
- Single click access to 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^{vi} performance and preferences allows calls or emails during scheduled wireless synchronization, and scheduling of synchronization for preferred times of the day.
- Empower IT administrators to get your mobile workforce up and running, quickly and easily, with deployment of MaxMobile to the field with wireless push and easy single-click installation for field staff — no laptop or physical presence required.

Web Access^{vii}: 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 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^{viii} 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
Sales						
Mobile Dashboards through Wireless Web Access	New (Freedom release)					
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 ^{ix}	✓	✓				
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)	✓	✓				
Quote management	✓	Improved	✓			
Partner Relationship Management	✓	✓	✓	✓	✓	
Lead management and routing	✓	✓	✓	✓		
Sales forecasting	✓	✓	✓	✓	✓	✓
Sales process methodology	✓	✓	✓	✓	✓	✓
Marketing						
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	✓	✓	✓	✓	✓	

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
Automated fax and print campaigns	✓	✓	✓	✓	✓	
Campaign management	✓	✓	✓	✓	✓	
Campaign response metrics	✓	Improved	✓	✓		
Do-not-solicit enforced by system	✓	✓	✓	✓		
Email monitoring and automatic replies**	✓	✓	✓	✓		
Campaign failure alerts	✓	✓	✓	✓		
Lead capture from website	✓	Improved	✓	✓	✓	
Customer segmenting with user fields	✓	✓	✓	✓	✓	✓
List management	✓	✓	✓	✓	✓	✓
Customer Service & Support						
Case creation based on incoming email	Improved	✓	✓			
Customer Service Executive Dashboard	✓	✓	✓			
Overdue case, case billing, other reports	✓	✓	✓			
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	✓	✓	✓	✓	✓	
Mobile CRM						
Support for BlackBerry Bold and Storm	New					
Support for iPhone, Nokia (Symbian OS) and Google G1 (Wireless Web Access only)	New					
Mobile Dashboards through Wireless Web Access	New (Freedom release)					
Integration with BlackBerry email	New (Freedom release)					
Integration with BlackBerry address book and phone	New					
Wireless/remote deployment for BlackBerry	New (Freedom release)					
One-click access to maps and directions	New					
Phone / email / SMS logging	New					
Storage of data on BlackBerry SD cards	New					
Online document library	New					
Customer service case management through Wireless Web Access	New					
Synchronization performance and preferences	Improved					
BlackBerry Access (MaxMobile)	✓	✓				
Windows Mobile Access (MaxMobile)	✓	✓	9.5 only			
Wireless Web Access view / search	Improved	✓	✓	✓	✓	
Palm synchronization	✓	✓	✓	✓	✓	✓
Web Access						
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	✓	✓	✓	✓	
General						
Customer & Prospect Action Plans	✓	✓	✓			
My Work Day (customizable home page)	✓	Improved	✓	✓		
Email, tasks, calendar integration with Outlook	✓	Improved	✓	✓	✓	

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
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)	✓	✓				
Accounting Link for QuickBooks®	✓	✓	✓	✓		
Key user-defined fields	✓	✓	✓	✓		
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	✓	✓	✓	✓
Remote synchronization	Improved	✓	✓	✓	✓	✓
Business Intelligence						
Mobile dashboards through Wireless Web Access	New (Freedom release)					
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)	✓	✓				
Workflow Automation						
Business activity monitoring & alerting**	✓	More	✓	✓		
Business process automation**	✓	✓	✓	✓		
Automatic report distribution**	✓	✓	✓	✓		
Email monitoring and response**	✓	✓	✓	✓		
eCommerce, Order Management						
Quote management	✓	✓				
Order management	✓	Improved	✓	✓		
Customer online order tracking	✓	✓	✓	✓	✓	
eCommerce site creation	✓	✓	✓	✓	✓	✓
Credit card processing	✓	✓	✓	✓	✓	✓
Product catalog	✓	✓	✓	✓	✓	✓
Architecture, Security & Administration						
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	✓	✓		

Maximizer CRM 10.5 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 synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: mobile devices, web, Windows desktop, remote synchronization

Technology Partners



Certified Solution Provider



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
Field-level security	✓	Improved				
Role-based security groups	✓	Improved	✓	✓	✓	✓
Support for Microsoft SMS for installation	✓	✓	✓			
Administrator-controlled Live Update	✓	✓	✓			
128-bit cipher public key encryption	✓	✓	✓	✓	✓	
SQL Server database	✓	✓	✓	✓	✓	
SQL Server Express database (Maximizer CRM Group Edition only)	✓	✓				
Administration reports	✓	Improved	✓			
Record global editing	✓	Improved	✓	✓	✓	
Windows Authentication for SQL Server only	✓	✓				
Single sign-on for Windows Desktop Access	✓	Improved	✓			
Single sign-on for Web Access	✓	✓				
Microsoft® Technology Support & Integration						
Works with Exchange Server	✓	✓	✓			
Works with Outlook	✓	Improved	✓	✓	✓	✓
Works with Excel	Improved	✓	✓			
Works with Word	✓	✓	✓	✓	✓	✓
Works with FrontPage	✓	✓	✓	✓	✓	
Web Access with Internet Explorer	✓	Improved	✓			
Accounting Link for Microsoft Dynamics™ GP	✓	✓				
CRM Vista Gadgets	✓	✓	✓			
Support for SMS for installation	✓	✓	✓			
Built for .NET framework	✓	Improved	✓	✓		
Integrates with Virtual Earth™	✓	✓	✓			
Support for SQL Database	✓	✓	✓	✓	✓	

**Requires Workflow Automation, an add-on product with additional fees.

- i. Maximizer Mobile CRM (MaxMobile) for BlackBerry and Windows Mobile is an add-on product with additional fees. MaxMobile requires at least one Windows Desktop, Web Access, or Dual Access license.
- ii. For a complete list of supported devices and/or wireless browser platforms, visit www.maximizer.com/support/products.html.
- iii. Maximizer CRM Wireless Web Access is included when you purchase a Web Access, Dual Access or MaxMobile license. IIS server required.
- iv. SD storage available for BlackBerry smartphones.
- v. Company Library access enabled through Wireless Web Access.
- vi. Wireless synchronization requires MaxMobile Wireless Synchronization Server (additional fees apply).
- vii. Web Access formerly named Employee Portal in earlier versions.
- viii. Supported by Maximizer CRM Professional and Enterprise Editions: Microsoft SQL Server 2005 and 2008 (applies to both 32-bit and 64-bit editions).

Visit www.maximizer.com/support/products.html for a complete list of supported databases.

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.

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

Visit 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

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