



What's New

Maximizer CRM 10 includes new features and key enhancements in the following areas:

1. Web Access
2. Mobile Device Access
3. Sales Enhancements
4. Microsoft Platform
5. On-Demand Sales & Professional Coaching
6. User Productivity
7. Business Visibility
8. Marketing Improvements
9. Security & Administration
10. Architecture



What's New in Maximizer CRM 10

Maximizer CRM continues to be the leading, simple, accessible, adaptable customer relationship management (CRM) solution for small and medium-sized businesses. More than ever, Maximizer CRM 10 gives you your choice of access—whether in the office, at home, or on the road. It adapts to the way you work, and grows as your business grows. Rely on Maximizer CRM to maximise revenues, maximise customer satisfaction, and maximise every single day. Simply Successful CRM.

Web Accessⁱ Improvements

Improved, faster Web Access for employees and administrators to access critical customer information wherever you are:

- Single sign-on with Windows Authenticationⁱⁱ
- Improved email integrated with Microsoft Exchange and other email servers
- Improved collaborative calendar
- Territory management
- More flexibility of user views with column set-ups
- User preference management
- Remote, web-based administration of users, custom fields, modules (sales, marketing, customer service), and database

More Mobile Device Access Options

More access with mobile devices—work with the devices that fit your business.

More Mobile Device Access Options: Get Maximizer CRM for your BlackBerry or Windows Mobile deviceⁱⁱⁱ – NEW

- With MaxMobile for BlackBerry, access and update contacts, leads, tasks, appointments, sales opportunities, and customer service cases from anywhere
- Installed on your device for offline availability, with wireless and wired synchronisation back-and-forth with Maximizer CRM (does not require the BlackBerry Enterprise Server)
- Define pre-set list to synchronise critical information while on the road
- Supports 7000 and 8000 series, including Pearl devices^{iv}



Windows Mobile® devices ^v

- With MaxMobile for Windows Mobile, access contacts, leads, tasks, appointments, sales opportunities and customer service cases from anywhere
- Installed on your device for offline availability, with wireless and wired synchronisation back-and-forth with Maximizer
- Define pre-set list to synchronise critical information while on the road
- Supports various Windows Mobile and SmartPhone devices (including MotorolaQ, Samsung BlackJack, and others)^{iv}

Improved Wireless Web Access ^{vi}

- When you don't want to install and synchronise directly to your device, Wireless Web Access option offers instant access to all contact, leads, tasks, appointments, and opportunities through a wireless web browser on any device
- Improved search & retrieval, and integrated calendar view
- Supports any web-enabled handhelds, including Palm and Nokia devices

Sales Enhancements

Maximise time, maximise revenue, and maximise team performance with enhancements in the sales module.

Territory management ^{vii} – NEW

- Effectively manage territories, re-assignment of accounts when teams change
- Automatically assign leads and accounts based on territory rules
- Track leads and customers by territory with out-of-the-box territory-based reports

Quote management – NEW

- Manage products, quotes and orders linked to sales opportunities to accurately track the entire sales and purchase cycle
- Integrated with Microsoft Word to format and customise quotes

Improved Sales Dashboard

- Management dashboards help start each day with a visual check on opportunities, leads, cases, and more

Microsoft Platform Additions and Enhancements

Maximise the Microsoft platform and maximise both your technology investments and your IT staff resources.

Microsoft Dynamics™ GP (formerly Great Plains®) integration ^{viii} - NEW

- New out-of-the-box integration with Dynamics GP provides 360° view of the customer by linking customer records from Maximizer CRM directly with their financial information
- With Accounting Link, view and create transactions, invoices, quotes, and purchase orders directly from Maximizer CRM

SQL Server Express – NEW

- Maximizer CRM now supports the SQL Server Express database^{ix}
- Free, lightweight, fast, embedded deployment, robust security with zero administration requirements

SQL Reporting Services – NEW

- New support for SQL Reporting Services and out-of-the-box reports
- New Microsoft platform for creating, managing, delivering traditional and interactive reports

Vista Gadgets^x - NEW

- One-click access from the desktop to Address Book to search contacts and leads; Sales Dashboard to get at-a-glance view of team performance



On-Demand Sales & Professional Coaching – NEW

In today's fast-paced, information hungry workforce, your staff needs the right information at the right time. Tips on how to negotiate a deal, advice on time management, or guidance on team leadership—the world's foremost motivational speakers in sales and professional development are now at your fingertips.

- Through CanDoGo[™], get instant access to sales & business know-how to equip teams to succeed in areas including: overcoming objections, creating winning proposals and presentations, teamwork skills, effective communication, leadership, and more
- Authors and experts include Zig Ziglar, Brian Tracy, Stephen Covey, Tony Parinello, Tom Hopkins, Denis Waitley + dozens more
- In-context, relevant knowledge in text, audio, video through Maximizer, Outlook, or online

Maximise User Productivity

When you're a growing business, we know that every minute counts, and that's why we've made performance enhancements to the calendar, email, and other modules that staff use daily. To help you and your staff maximise every single day.

Business Calendar & Tasks Enhancements

- Collaborative calendar, including Microsoft Exchange users and support for multiple client contact scheduling
- Appointment categorisation by product/service for improved business activity and performance tracking
- Sort Tasks for quickly following up on priority calls and deals

Outlook™ -Integrated Email

- Improved integration directly from Outlook to Maximizer
- Spell-check in HTML email
- Record logging preferences

My Work Day home page

- Improved daily dashboard
- Flexibility for business users to choose what information is displayed

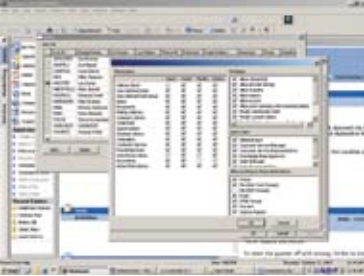
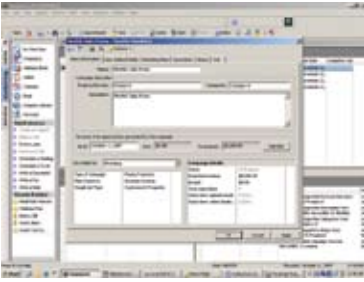
Address Book contacts and leads

- Improved duplicate checking (email & phone field)
- Global edit for adding, modifying, and now deleting user-defined field values

Business Visibility Enhancements

When you're in a competitive market, maintaining a pulse on your business gives you the power to optimise team performance and stay ahead of the competition. More out-of-the-box reports and dashboards, and more flexibility give you the power to visualise and maximise success.

- Improved daily Dashboard view for managers
- Support for Microsoft SQL Reporting Services (SRS) for creating, managing, delivering traditional and interactive reports
- Office 2007-like user experience to make reporting more approachable to users of all skill levels with Radius 90[™]
- More Maximizer reports including time management report to manage team schedules by product
- Crystal Reports—more reports out-of-the-box for quote management and system administration
- SRS Reports—new reports out-of-the-box for campaign management, lead summary, and customer service case assignment
- New Alerts—more pre-configured email alerts to be notified when there are significant business events that you need to be aware of, including: changes in territory assignment, outstanding quotes about to expire, cancelled orders, short orders, and high performing campaigns based on associated sales opportunities



Marketing Module Enhancements

Maximise results and ROI with enhancements in the marketing module.

- Track in-progress and won sales opportunities by campaign for better tracking of marketing ROI, helping you make smart decisions on marketing investments
- See response rates to marketing campaigns at a glance
- Collect data from web forms directly into Maximizer CRM, including any custom fields; use for online lead data collection, event registration, online surveys, and more

Tightened Security and Improved Administration

Maintain control and ease administration of your CRM system with improvements in these areas.

- Full and read-access security levels for all data types
- More control over individual user security rights, including importing/exporting, transferring, and administration
- Improved control over user-defined (custom) field de-activation and visibility to users
- Additional administrator role for temporary or regional administration with added control over permissions for security
- Support for multiple database synchronisation through MaxExchange

Architecture Built for Integration

Maximise productivity of your developers or partners with easier customisation using the updated architecture built for integration.

- New web services architecture enables standardised faster integration
- New meta data layer with interface customisation utility for easier integration and field label changing in the interface to suit your business and industry
- Windows authentication mode for SQL Server^{xiii}
- Now based on .NET Framework 3.0

Upgrade today to Maximizer CRM 10 and get Simply Successful CRM!

Compare Your Version to Maximizer CRM 10

| USER FEATURES | Maximizer CRM 10 | Maximizer Enterprise 9/9.5 | Maximizer Enterprise 8 | Maximizer Enterprise 7/7.5 | Maximizer Enterprise 6.0 | Maximizer Enterprise 5.x |
|--|------------------|----------------------------|------------------------|----------------------------|--------------------------|--------------------------|
| Sales | | | | | | |
| Sales Executive Dashboard | Improved | ✓ | | | | |
| Sales funnel reports | ✓ | ✓ | | | | |
| Lead Summary reports | ✓ | ✓ | | | | |
| On-demand sales coaching ^{xt} | New | | | | | |
| Opportunity analysis & pipeline reports | ✓ | ✓ | ✓ | | | |
| Sales Action Plans | ✓ | ✓ | | | | |
| Interactive organisational 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 | New | | | | | |
| Quote management | Improved | ✓ | | | | |
| Partner Relationship Management* | ✓ | ✓ | ✓ | ✓ | | |
| Lead management and routing | ✓ | ✓ | ✓ | | | |
| Sales forecasting | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Sales process methodology | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Marketing | | | | | | |
| 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-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 | | | | | | |
| Customer Service Executive Dashboard | ✓ | ✓ | | | | |
| Overdue case, case billing, other reports | ✓ | ✓ | | | | |
| Case creation based on incoming email | ✓ | ✓ | | | | |
| Case management (routing, queuing) | ✓ | Improved | ✓ | v7.5 only | | |
| Case resolution | ✓ | Improved | ✓ | v7.5 only | | |
| Knowledge Base | ✓ | Improved | ✓ | v7.5 only | | |

| USER FEATURES | Maximizer CRM 10 | Maximizer Enterprise 9/9.5 | Maximizer Enterprise 8 | Maximizer Enterprise 7/7.5 | Maximizer Enterprise 6.0 | Maximizer Enterprise 5.x |
|---|------------------|----------------------------|------------------------|----------------------------|--------------------------|--------------------------|
| 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* | ✓ | ✓ | ✓ | ✓ | | |
| Anywhere Access | | | | | | |
| BlackBerry Access (MaxMobile) | New | | | | | |
| Windows Mobile Access (MaxMobile) | ✓ | 9.5 only | | | | |
| Web Access | Improved | ✓ | ✓ | ✓ | | |
| Wireless Web Access | Improved | ✓ | ✓ | ✓ | | |
| Remote synchronisation | Improved | ✓ | ✓ | ✓ | ✓ | ✓ |
| Palm synchronisation | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| General | | | | | | |
| On-demand professional coaching [†] | New | | | | | |
| Customer & Prospect Action Plans | ✓ | ✓ | | | | |
| My Work Day (customisable 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 Dynamics GP (formerly Great Plains) | New | | | | | |
| Accounting Link for QuickBooks | ✓ | ✓ | ✓ | | | |
| Key user-defined fields | ✓ | ✓ | ✓ | | | |
| Categorised 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 | ✓ | ✓ | ✓ | ✓ | ✓ |

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|---|------------------|----------------------------|------------------------|----------------------------|--------------------------|--------------------------|
| Business Intelligence | | | | | | |
| Executive Dashboard with Key Performance Indicators | Improved | ✓ | ✓ | ✓ | | |
| Out-of-the box, pre-formatted reports (Maximizer, Crystal, Microsoft SRS) | Improved | ✓ | ✓ | ✓ | ✓ | ✓ |
| Support for Crystal Reports | ✓ | ✓ | ✓ | | | |
| Support for Crystal Reports Server | ✓ | ✓ | | | | |
| Support for Microsoft SQL Reporting Services (SRS) | New | | | | | |
| Support for Radius90 | New | | | | | |
| Workflow Automation | | | | | | |
| Business activity monitoring & alerting** | More | ✓ | ✓ | | | |
| Business process automation** | ✓ | ✓ | ✓ | | | |
| Automatic report distribution** | ✓ | ✓ | ✓ | | | |
| Email monitoring and response** | ✓ | ✓ | ✓ | | | |
| eCommerce, Order Management | | | | | | |
| Quote management | New | | | | | |
| Order management | Improved | ✓ | ✓ | | | |
| Customer online order tracking | ✓ | ✓ | ✓ | ✓ | | |
| eCommerce site creation | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Credit card processing | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Product catalog | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Architecture, Security & Administration | | | | | | |
| Web services | New | | | | | |
| Meta data layer through interface customisation utility | New | | | | | |
| Customisation 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 | ✓ | ✓ | | | | |
| 128-bit cipher public key encryption | ✓ | ✓ | ✓ | ✓ | | |
| SQL Server database | ✓ | ✓ | ✓ | ✓ | | ✓ |
| SQL Server Express database | New | | | | | |
| Administration reports | Improved | ✓ | | | | |
| Record global editing | Improved | ✓ | ✓ | ✓ | | |
| Windows Authentication for SQL Server Only | New | | | | | |
| Single Sign-On for Windows Desktop Access | Improved | ✓ | | | | |
| Single Sign-on for Web Access | New | | | | | |

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



| USER FEATURES | Maximizer CRM 10 | Maximizer Enterprise 9/9.5 | Maximizer Enterprise 8 | Maximizer Enterprise 7/7.5 | Maximizer Enterprise 6.0 | Maximizer Enterprise 5.x |
|--|------------------|----------------------------|------------------------|----------------------------|--------------------------|--------------------------|
| Microsoft® Technology Support & Integration | | | | | | |
| Works with Exchange Server | ✓ | ✓ | | | | |
| Works with Outlook | Improved | ✓ | ✓ | ✓ | ✓ | ✓ |
| Works with Excel | ✓ | ✓ | | | | |
| Works with Word | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Works with FrontPage | ✓ | ✓ | ✓ | ✓ | | |
| Web Access with Internet Explorer | Improved | ✓ | | | | |
| Accounting Link for Dynamics GP | New | | | | | |
| CRM Vista Gadgets | ✓ | ✓ | | | | |
| Support for SMS for installation | ✓ | ✓ | | | | |
| Built for .NET framework | Improved | ✓ | ✓ | | | |
| Integrates with Virtual Earth™ | ✓ | ✓ | | | | |
| Support for SQL Database | ✓ | ✓ | ✓ | ✓ | | Only 5.5 |

- i. Web Access formerly called Employee Portal in earlier versions
- ii. Windows Authentication and single sign-on only available as advanced functionality with Professional and Enterprise Editions only.
- iii. MaxMobile for BlackBerry is an add-on product with additional fees. Wireless synchronisation requires either BlackBerry Enterprise Server or MaxMobile Wireless Sync Server (additional fees apply).
- iv. For a complete list of supported devices and/or wireless browser platforms, visit www.max.co.uk/support/supportedproducts.htm
- v. MaxMobile for Windows Mobile is an add-on product with additional fees. Wireless synchronisation requires MaxMobile Wireless Sync Server (additional fees apply).
- vi. Wireless Web Access option available with purchase of Web Access option, included with Maximizer CRM Enterprise Edition, and separate fee for Group and Professional Edition.
- vii. Territory Management feature available as advanced functionality in Enterprise Edition only.
- viii. Accounting Link for Microsoft Dynamics GP is an add-on product with additional fees. Supports GP9.0.
- ix. SQL Server Express powers the Group Edition only and is provided for free; SQL Server Standard Edition is used for Professional and Enterprise Editions.
- x. Vista Gadgets are free for Maximizer CRM customers, but must be downloaded from crmgadgets.max.co.uk. See system requirements before downloading.
- xi. CanDoGo access available with additional subscription directly through Maximizer Software; one-click access through Maximizer CRM will be available in the future.
- xii. Radius 90 is an add-on solution available through Maximizer Software for additional license fees.
- xiii. Windows Authentication available only with Enterprise Edition.
- xiv. ** All items in version comparison chart marked with ** require Workflow Automation, which is an add-on product with additional fees.

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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