



# 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 & tasks, synchronize with BlackBerry®, Windows Mobile® and Palm® devices, and link with QuickBooks®.

### **Move Up to Maximizer™ CRM 10 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, 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 synchronization
- 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			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (Contact Manager)
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
Technical Support	Priority support included	Priority support included	Installation support included	Installation support included
<b>Anywhere Access</b>				
BlackBerry Access (MaxMobile)	✓ (add-on)	✓ (add-on)	✓ (add-on)	
BlackBerry Access (MaxMobile Lite)	✓ (add-on)	✓ (add-on)	✓ (add-on)	✓ (add-on)
Windows Mobile Access (MaxMobile)	✓ (add-on)	✓ (add-on)	✓ (add-on)	
Windows Mobile Access (MaxMobile Lite)	✓ (add-on)	✓ (add-on)	✓ (add-on)	✓ (add-on)
Windows Desktop Access	✓	✓	✓	✓
Web Access	✓ (option)	✓ (option)	✓ (option)	
Wireless Web Access	✓	✓	✓	
Remote synchronization	✓	✓	✓	
Palm synchronization	✓	✓	✓	✓
<b>Sales</b>				
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 organizational charts	✓	✓	✓	✓
Quote management	✓	✓	✓	
Partner Relationship Management	✓ (add-on)	✓ (add-on)	✓ (add-on)	
Lead management and routing	✓	✓	✓	
Sales forecasting	✓	✓	✓	
Sales process methodology	✓	✓	✓	
<b>Marketing</b>				
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.**	✓	✓	✓	

USER FEATURES	Maximizer CRM 10			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (Contact Manager)
Automated email campaigns	✓	✓	✓	
Automated fax and print campaigns	✓			
Campaign management	✓	✓	✓	
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	✓	✓	✓	✓
<b>Customer Service &amp; Support</b>				
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>General Productivity Features</b>				
On-demand professional coaching	✓ (add-on)	✓ (add-on)	✓ (add-on)	✓ (add-on)
Customer & Prospect Action Plans	✓	✓	✓	✓
My Work Day (customizable 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	✓	✓	✓	✓
Categorized 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	✓	✓	✓	✓

USER FEATURES	Maximizer CRM 10			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (Contact Manager)
Task management	✓	✓	✓	✓
Account notes	✓	✓	✓	✓
Account documents	✓	✓	✓	✓
Company-wide document sharing	✓	✓	✓	✓
Letters, faxes with merge fields	✓	✓	✓	✓
User configuration of views	✓	✓	✓	✓
<b>Business Intelligence</b>				
Executive Dashboard with Key Performance Indicators	✓	✓	✓	
Out-of-the-box, pre-formatted reports (Maximizer, Crystal, Microsoft SRS)	✓	✓	Maximizer & Crystal Reports only	Maximizer & Crystal Reports only
Web Reporting	✓	✓		
Support for Crystal Reports	✓	✓	✓	✓
Support for Crystal Reports Server	✓	✓	✓	
Support for Microsoft SQL Reporting Services (SRS)	✓	✓		
Support for Radius <sup>90</sup>	✓	✓		
Support for analytics	✓	✓		
<b>Workflow Automation</b>				
Business activity monitoring & alerting **	KnowledgeSync Lite included	✓ (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 customization utility	✓	✓	✓	
Customization Suite	✓ (add-on)	✓ (add-on)	✓ (add-on)	
Accounting integration out-of-the-box (QuickBooks, Dynamics GP)	✓ (add-on)	✓ (add-on)	✓ (add-on)	QuickBooks only (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	✓	✓	✓	

USER FEATURES	Maximizer CRM 10			
	Enterprise Edition	Professional Edition	Group Edition	Entrepreneur Edition (Contact Manager)
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	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 Customer Web Access licenses (add-on license fee applies).

\*\* 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

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### 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.maximizer.com](http://www.maximizer.com) 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 maximize revenue, maximize satisfaction, and maximize every single day.

**Call: 1-800-804-6299**

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