

# Which is right for you?

## Maximizer CRM 11

### 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: mobile devices, web, Windows desktop, remote synchronisation

## Maximizer™ CRM Editions, Maximizer Contact Manager

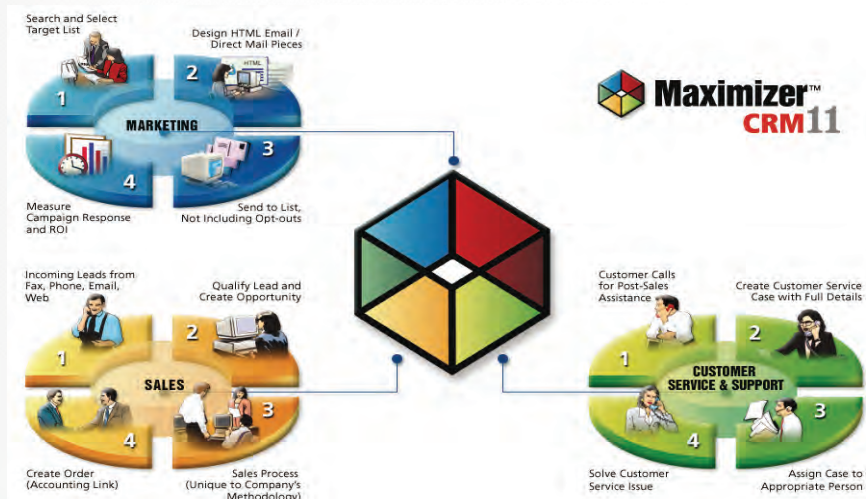
### Start with Maximizer™ for Contact Management

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, homebased 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, access through BlackBerry®, Palm® and Windows Mobile devices, and even link with QuickBooks®.

Entrepreneur Edition is designed for individuals or up to five users working together in a networked environment. Team Edition is designed for groups of 5-50 users, also working in a networked environment, where more advanced sales opportunity management and collaboration is required. Team Edition also includes MaxMobile for BlackBerry®, as well as one full year of technical support and upgrade assurance.

### Move up to Maximizer™ CRM 11 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 contact and schedule management, this integrated solution streamlines Sales, Marketing and Customer Service & Support helping you to work with utmost efficiency. With All Access licensing, leverage unparalleled convenience and access to your critical customer information, through your Windows Desktop, a Web browser and your mobile smartphone. Maximizer CRM 11 delivers a complete, robust solution – when and where you need it. Optimise your level of productivity, performance and profitability with intelligent features and advanced functionality.



## Compare Maximizer CRM Editions

		Maximizer CRM Editions			
USER FEATURES		Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition (Contact Manager)
General	Who it's for	Advanced CRM for medium to large sized businesses	Full-featured CRM for small businesses	Sales & contact manager for small businesses	Contact manager for entrepreneurs
	Minimum # of Users	5	1	5	1
	Maximum # of Users	Unlimited	10	50	5
	Product Upgrade Assurance	Required	Required	Required	Optional
Access Options	CRM for iPhone, Windows Mobile, Google Android, Nokia	Wireless Access	Wireless Access		
	CRM for BlackBerry	MaxMobile	MaxMobile	MaxMobile	MaxMobile Lite
	Web Access (including Firefox Support)	✓	✓		
	Windows Desktop Access	✓	✓	✓	✓
	Remote Synchronisation	✓	✓		
	MaxMobile Wireless Server	✓	✓		
Sales	Wireless Web Access	✓	✓		
	Sales Force Automation	Advanced <sup>†</sup>	Standard	Basic	Basic
	Sales Executive Dashboard	✓	✓		
	Sales funnel reports	✓	✓	✓	✓
	Lead Summary reports	✓	✓		
	Opportunity management	Advanced	Advanced	Basic	Basic
	Opportunity monitoring (alerts)	✓	✓		
	Sales Quota Management	✓			
	Sales Action Plans	✓	✓	✓	✓
	Territory 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		
	Lead management and routing	✓	✓		
	Sales forecasting	✓	✓	✓	✓
Sales process methodology	✓	✓			
Marketing	Marketing Automation	Advanced <sup>†</sup>	Standard		
	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	✓	✓		
	Do-not-solicit enforced by system	✓	✓		
	Email monitoring and automatic replies *	✓	✓		
	Campaign failure alerts	✓	✓		
	Web lead capture	✓	✓		
	Customer segmenting with user fields	✓	✓	✓	✓
List management	✓	✓	✓	✓	

		Maximizer CRM Editions			
USER FEATURES		Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition (Contact Manager)
Customer Service & Support	Customer Service	Advanced <sup>III</sup>	Standard		
	Customer Service Executive Dashboard	✓	✓		
	Overdue case, case billing, other reports	✓	✓		
	Case creation based on incoming email	✓	✓		
	Case management (routing, queuing)	✓	✓		
	Case resolution	✓	✓		
	Knowledge Base	✓	✓		
	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			
Business Productivity	Customer & Prospect Action Plans	✓	✓	✓	✓
	My Work Day (customisable home page)	Advanced	Advanced	Basic	Basic
	Email, tasks and calendar integration with Outlook	✓	✓	✓	✓
	Email, tasks and calendar integration with Exchange Server	Add-on	Add-on		
	Email templates with merge fields	✓	✓		
	Maximizer toolbar in Outlook	✓	✓	✓	✓
	Import/export in standard formats	✓	✓	✓	✓
	Support for HTML email	✓	✓	✓	✓
	Accounting Link for Dynamics GP (formerly Great Plains)	Add-on	Add-on		
	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	✓	✓	✓	✓
Business Intelligence	Dashboards	✓	✓		
	Reports: Crystal	✓	✓	✓	✓
	Reports: SQL Reports	✓			
	Reports: Web	✓			
	Workflow Automation	Add-on	Add-on		
	Partner Web Access	Add-on	Add-on		
Workflow	Customer Web Access	✓	Add-on		
	Business activity monitoring & alerting *	Add-On	Add-on		
	Business process automation*	Add-on	Add-on		
	Automatic report distribution*	Add-on	Add-on		
	Email monitoring and response*	Add-on	Add-on		

		Maximizer CRM Editions			
USER FEATURES		Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition (Contact Manager)
Architecture, Security & Administration	Web services	✓	✓	✓	
	Meta data layer through interface customisation utility	✓	✓	✓	
	Customisation Suite	Add-on	Add-on		
	Integration with Accounting API	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 Express	SQL Express	SQL Express	
Microsoft® Technology Support & Integration	Calendar Integration with Exchange Server	Add-on	Add-on		
	Works with Outlook	✓	✓	✓	✓
	Works with Excel	✓	✓	✓	✓
	Works with Word	✓	✓	✓	✓
	Works with FrontPage	✓	✓		
	Works with SharePoint	✓	✓		
	Web Access with Internet Explorer	✓	✓		
	Accounting Link for Dynamics GP	Add-on	Add-on		
	Accounting Link for QuickBooks	Add-on	Add-on	Add-on	Add-on
	Support for SMS for installation	✓	✓	✓	✓
Built for .NET framework	✓	✓	✓	✓	
Integrates with Virtual Earth™	✓	✓	✓	✓	

## Technology Partners



## Certified Solution Provider



\*Requires Workflow Automation powered by KnowledgeSync; add-on license fee applies.

- i. Advanced Sales Force Automation features include territory management and advanced workflow events.
- ii. Advanced Marketing Automation includes print and fax campaign management.
- iii. Advanced Customer Service & Support Management module includes advanced workflow events.

### Why Maximizer CRM 11?

1. **Simple & Quick** to deploy, learn, use and maintain
2. **Access Options** through web, desktop and mobile smartphones
3. **Value.** Best Value for a full-featured CRM, low total cost of ownership
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

### Visit [www.max.co.uk](http://www.max.co.uk) 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

**Maximizer Software**  
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