

Which is right for you?

"Maximizer CRM will fulfill our goal of using one turn-key system to comprehensively manage sales, marketing and customer service efforts."

Zina Oster
Pacific Northwest Territory Manager
Colonial Life

Maximizer® CRM Editions

Whether you're a start-up small business in need of CRM, or have hundreds of employees and thousands of customers, Maximizer CRM has the right solution for you. Maximizer CRM adapts to the way you work, and grows as your business grows. Choose from the following editions, as well as several add-on modules and options for the solution that matches your business needs. The right solution will depend on your number of users, access, and feature requirements.

Compare Maximizer CRM Editions *Jan*

DEPLOYMENT OPTIONS	ON-PREMISE			CLOUD BASED
FEATURES	Entrepreneur	Group	Enterprise	CRM Live
Who It's For	Contact Manager for Entrepreneurs and Small Businesses	Full-featured CRM for Small Businesses	Advanced CRM for Medium Sized Businesses and Divisions of Large Corporations	Advanced CRM for anywhere access in the cloud – no setup required
# of Users	1-5	1-10	5-Unlimited	1-Unlimited
MaxAdvantage ¹ Maintenance (Technical support & upgrade assurance)	Optional	Included	Included	Unlimited
Access Options				
Windows Desktop Access	✓	✓	✓	
Web Access		✓	✓	✓
Mobile Access for Smartphones (iPhone, Android and Blackberry) <i>Simon</i>		✓	✓	✓
Mobile Access for Tablets (iPad, Android and Blackberry Playbook)		✓	✓	✓
MaxMobile for Blackberry	Optional Add-On	✓	✓	
Offline Access (Remote Synchronization)			✓	
Sales				
Sales Force Automation	✓	✓	✓	✓
Sales Forecasting	✓	✓	✓	✓
Sales Executive Dashboards		✓	✓	✓
Sales Funnel Reports		✓	✓	✓
Leads Management and Routing		✓	✓	✓
Opportunity Management	Basic	Team & Individual	Team & Individual	✓
Opportunity Monitoring (Alerts)		✓	✓	✓
Sales Action Plan (Project Management)	✓	✓	✓	✓



Wizard-Driven Dashboards: Easy to set up and modify, key performance indicators provide real-time insight into your business.

DEPLOYMENT OPTIONS

FEATURES

Entrepreneur

ON-PREMISE

Group

Enterprise

CLOUD BASED

CRM Live

Territory Management			✓	✓
Sales Quota Management			✓	✓
Sales Strategies & Process Methodology		✓	✓	✓
Interactive Organizational Charts	✓	✓	✓	
Quote Management		✓	✓	
*Real-time alerts including lead status alerts, changed forecast, won/lost deals		Optional Add-On	Optional Add-On	
Partner Relationship Management (Partner Web Portal)		Optional Add-On	Optional Add-On	

Marketing

Mass Emailing	✓	✓	✓	✓
Customer Segmentation	✓	✓	✓	✓
Customer List Management	✓	✓	✓	✓
Web Lead Capture		✓	✓	✓
Automated Email Campaigns		✓	✓	✓
Marketing Automation & Campaign Management		✓	✓	✓
Manage Respondent Lists (Which customers received, opened, bounced, URLs clicked, etc.)		✓	✓	✓
Campaign ROI Calculator		✓	✓	✓
Do-Not-Solicit options		✓	✓	✓
Email Campaign Metrics (total sent, received, opened, etc.)		✓	✓	✓
*Email Monitoring and automated replies		Optional Add-On	Optional Add-On	
*Real-time alerts including lead status alerts, suspended & late campaigns		Optional Add-On	Optional Add-On	
*System monitoring of user unsubscribes		Optional Add-On	Optional Add-On	

Customer Service & Support

Customer Service Case Management (Routing, Queuing, agent workloads, alerts)		✓	✓	✓
Customer Service Cases, Billing, Queue Reports		✓	✓	✓
Customer Service Executive Dashboards		✓	✓	✓
Automatic case creation via incoming email		✓	✓	✓
Service Billing		✓	✓	✓
Automated Case Monitoring & Alerts		✓	✓	✓
Knowledge Base for storing common cases and resolutions		✓	✓	✓

604-601-8078

2.1

\$3200.00

attch = 1299.00

299 x 3

1800K Sppt

4200K Sppt

5K

DEPLOYMENT OPTIONS FEATURES	ON-PREMISE			CLOUD BASED
	Entrepreneur	Group	Enterprise	CRM Live
*Real-time alerts include case overload, overdue cases, and status changes		Optional Add-On	Optional Add-On	
*Advanced Monitoring and automated replies		Optional Add-On	Optional Add-On	
Customer self-service web portal		Optional Add-On	Optional Add-On	
Business Productivity				
Customer Timeline (at a glance history of all communications)		✓	✓	✓
Email, Letter, Fax Templates with Merge Fields	✓	✓	✓	✓
Unlimited Custom Fields (User-Defined Fields)	✓	✓	✓	✓
Customizable Mandatory Fields	✓	✓	✓	✓
Unlimited Column Views (Column Setups)	✓	✓	✓	✓
Efficient selection of individual or teams' customization settings (saved searches, column setups, favorite lists)	✓	✓	✓	✓
Photos for Accounts and Users	✓	✓	✓	✓
Social Media Integrations through hyperlink documents and LinkedIn®	✓	✓	✓	✓
Multi-User Calendar	✓	✓	✓	✓
Task Management	✓	✓	✓	✓
Document Management	✓	✓	✓	✓
Unlimited notes and documents with each Account	✓	✓	✓	✓
Advanced searching and list building	✓	✓	✓	✓
Duplicate Record Checking	✓	✓	✓	✓
Mass Editing of Records	✓	✓	✓	✓
Customer and Prospect Action Plans	✓	✓	✓	✓
Customizable Home Page (My Work Day)	✓	✓	✓	✓
Data import/export (CSV, XLS & other standard formats)	✓	Simplified import from MS Outlook	Simplified import from MS Outlook	Simplified import from MS Outlook
CTI (Computer Telephony) integration	✓	✓	✓	
Business Intelligence				
Built In and Customizable Dashboards		✓	✓	✓
Crystal Reports	✓	✓	✓	
SQL Reports (SSRS)		✓	✓	
Web Reports		✓	✓	✓

Maximizer CRM Features

- Account and Contact Management
- Sales Force Automation and Forecasting
- Marketing Campaigns Automation
- Customer Service & Support
- MS Office Integration and MS Exchange Synchronization
- Multi User Appointment Management
- Task Management and Assignment
- Document Management
- Business Intelligence
- Workflow Automation
- Partner and Customer Web Portals
- Mobile, Web, Windows Desktop and Offline Access Options

DEPLOYMENT OPTIONS

FEATURES	Entrepreneur	Group	Enterprise	CRM Live
Customizations, Architecture, Security & Administration				
Customization Suite		Optional Add-On	✓	
Meta Data Customizations	✓	✓	✓	✓
Full and read-only access settings		✓	✓	
Field-level security	✓	✓	✓	✓
Role-based security groups	✓	✓	✓	✓
Administrator controlled Live Updates for installations		✓	✓	Automatic
Windows Authentication for SQL Server			✓	
Database Server	SQL Express	SQL Express	SQL Server	SQL Azure
Microsoft Products Support & Integration				
MS Outlook	✓	✓	Advanced ²	Advanced ²
MS Word	✓	✓	✓	✓
MS Excel	✓	✓	✓	✓
MS Sharepoint ³		✓	✓	
MS Exchange Server (MaxSync)		Optional Add-On	Optional Add-On	

Technology Partners



Certified Solution Provider



- 1 MaxAdvantage maintenance included for one full year. Renewal fee after one year at 20% of license MSRP
 - 2 Enterprise edition and CRM Live Outlook Integration includes the ability to auto-save and track emails
 - 3 Requires Customization Suite
 - 4 Requires LinkedIn premium subscription
- * Requires Workflow Automation powered by KnowledgeSync. Additional license fees apply.

Why Maximizer CRM?

1. **Simple & quick** to deploy, learn, use and maintain.
2. **Access options** through the Web, mobile devices, Windows desktop and remote synchronization.
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.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

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

Maximizer Software
Simply Successful CRM

Call: 1-800-804-6299

Email: sales@maximizer.com

Web: www.maximizer.com

Americas
604-601-8000 PH
604-601-8001 FAX

info@maximizer.com
www.maximizer.com

Europe, Middle East
+44 (0) 845 555 99 55 PH
+44 (0) 845 555 99 66 FAX

info@max.co.uk
www.max.co.uk

Australia, New Zealand
+61 (0) 2 9957 2011 PH
+61 (0) 2 9957 2711 FAX

info@maximizer.com.au
www.maximizer.com.au

Asia
+(852) 2598 2888 PH
+(852) 2598 2000 FAX

info@maximizer.com.hk
www.maximizer.com.hk
www.maximizer.com.cn