

Edition Comparison

Maximizer CRM Editions

November 2011

Which Edition Is Right For You?

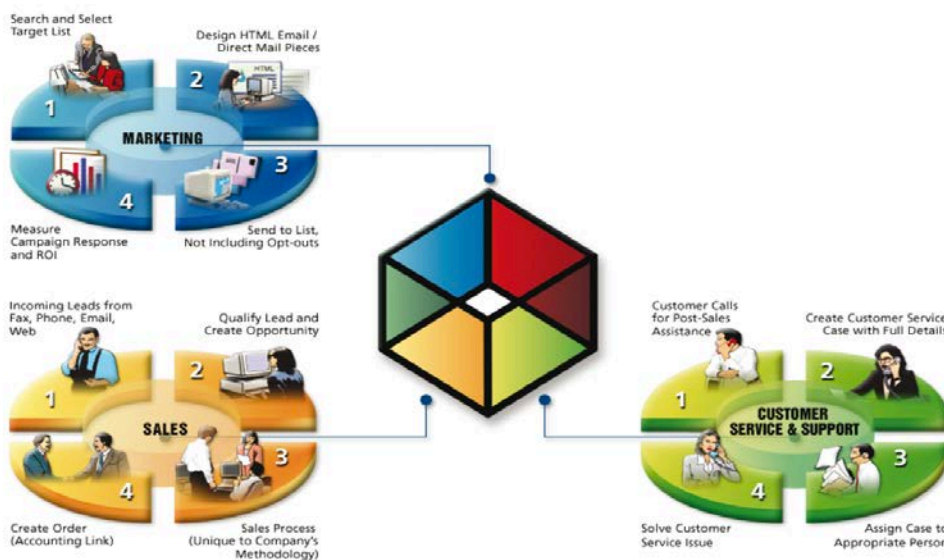
Whether you're a start-up small business in need of CRM, or have hundreds of employees and thousands of customers, Maximizer CRM has the right solution for you. Maximizer CRM adapts to the way you work, and grows as your business grows. Choose from the following editions, as well as several add-on modules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

Available Editions:

- Enterprise edition version 12
- Group edition version 12
- Team edition version 11
- Entrepreneur edition version 11

Maximizer CRM Features

- Account and contact management
- LinkedIn integration
- Time management & iCalendar integration
- Task management and automation
- Sales force automation & Forecasting
- Marketing campaign automation & Management
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronisation
- Business Intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, Web, Windows desktop, remote synchronisation



Compare CRM Editions

		Maximizer CRM Editions			
USER FEATURES		Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
General	Who It's for	Advanced CRM for medium-sized businesses	Full-featured CRM for small businesses	Sales-focused Contact Manager for small to medium-sized businesses	Contact Manager for Entrepreneurs & small businesses
	Minimum # of Users	1	1	5	1
	Maximum # of Users	Unlimited	10	50	5
	Product Upgrade Assurance ¹	Included	Included	Included	N/A
	Technical Support	Additional	Additional	Additional	Self Service Only
Access Options	Mobile CRM for smartphones (including iPhone, Google Android, and BlackBerry®) and tablets (including iPad)	Mobile Access	Mobile Access		
	MaxMobile CRM for BlackBerry®	✓	✓	✓	✓ ²
	Web Access (including Firefox support)	✓	✓		
	Windows Desktop Access	✓	✓	✓	✓
	Remote Synchronisation	✓	Add-on		
Sales	Sales Force Automation	Advanced ³	Standard	Basic	Basic
	Sales Executive Dashboard	✓	✓		
	Sales funnel reports	✓	✓	✓	✓
	Lead Summary reports	✓	✓		
	Opportunity Management	Team and Individual	Team and Individual	Team and Individual	Basic
	Opportunity Monitoring (alerts)	✓	✓		
	Sales Quota Management	✓			
	Sales Action Plan (Project Management)	✓	✓	✓	✓
	Email templates with merge fields	✓	✓	✓	✓
	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	Automated email campaigns	✓	✓	
Automated fax and print campaigns		✓			
Campaign management		✓	✓		
Marketing Automation		✓	✓		
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*	✓	✓			

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USER FEATURES		Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Con't Marketing	Do-not-solicit enforced by system	✓	✓		
	Email monitoring and automatic replies*	✓	✓		
	Campaign failure alerts	✓	✓		
	Web lead capture	✓	✓		
	Customer segmenting with user-defined fields	✓	✓	✓	✓
	List management	✓	✓	✓	✓
Customer Service & Support	Customer Service	Advanced ⁴	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 portal	Add-on	Add-on		
	Business Productivity	Customer & Prospect Action Plans	✓	✓	✓
My Work Day (customizable home page)		Advanced	Advanced	Standard	Standard
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		✓	✓	✓	✓
Industry Packs for IT, Legal, Financial, Real Estate		✓	✓	✓	✓
Key user-defined custom 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	✓	✓	✓	✓	

1 Product Upgrade Assurance included for one full year. Renewal fee after one year at 20% of license RRP.

2 MaxMobile CRM for BlackBerry is included with Team Edition. MaxMobile CRM for BlackBerry is an add-on product for Entrepreneur Edition with additional license fees. MaxMobile CRM for BlackBerry requires wireless server hardware and Microsoft® Internet Information Services (IIS)

3 Advanced Sales Force Automation features include Territory Management and advanced Workflow events.

4 Advanced Customer Service & Support Management module includes advanced Workflow events.

		Maximizer CRM Editions			
USER FEATURES		Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Business Intelligence	Dashboards	✓	✓		
	Reports: Crystal	✓	✓	✓	✓
	Reports: SQL	✓	✓		
	Reports: Web	✓	✓		
	Workflow Automation	Add-on	Add-on		
	Partner Web Access	Add-on	Add-on		
	Customer Web Access	Add-on	Add-on		
Workflow Automation	Business activity monitoring & alerting*	Add-on	Add-on	Add-on	
	Out-of-the-box queries and events to monitor business ⁵	Advanced Event Pack	Standard Event Pack	Standard Event Pack	
	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	
Architecture, Security & Administration	Meta data layer through interface customisation utility	✓	✓		
	Customisation Suite	✓	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 or SQL Express	SQL Express	SQL Server or SQL Express	SQL Express
Microsoft [®] Technology Support & Integration	Works with Exchange Server	Add-on	Add-on		
	Works with Outlook [®]	✓	✓	✓	✓
	Works with Excel [®]	✓	✓	✓	✓
	Works with Word [®]	✓	✓	✓	✓
	Works with FrontPage [®]	✓	✓		
	Works with SharePoint ^{® 6}	✓	✓		
	Web Access with Internet Explorer [®] and Firefox	✓	✓	✓	
	Support for SMS for installation	✓	✓	✓	✓
	Built for .NET framework	✓	✓	✓	✓
	Integrates with Google [®] and Bing TM Maps	✓	✓	✓	✓
	Support for SQL Server	SQL Express or SQL Server	SQL Express	SQL Express or SQL Server	SQL Express

5 Advanced Event Pack includes 116 Queries and 78 Events based on features in Enterprise Edition; Standard Event Pack includes 69 Queries and 29 Events based on features in Group and Team Editions.

6 Requires Customisation Suite - available for Maximizer CRM Group and Enterprise editions. For Enterprise edition Customisation Suite is included in the user price, for Group edition additional license fees apply.

* Requires Workflow Automation powered by KnowledgeSync. Additional license fees apply.