



## Which is right for you?

### Maximizer Enterprise™ CRM vs. Maximizer™ Contact Manager

*“Migrating from Maximizer Contact Manager to Maximizer Enterprise CRM was easy. Using CRM 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*

#### 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 award-winning contact manager ideal for home offices and individuals. It is easy to configure, so you can get up and running quickly and focus on your business. With Maximizer, manage your contacts, schedule appointments & tasks, synchronise with Palm® devices, build an e-commerce website, generate website leads, and even link with QuickBooks®.

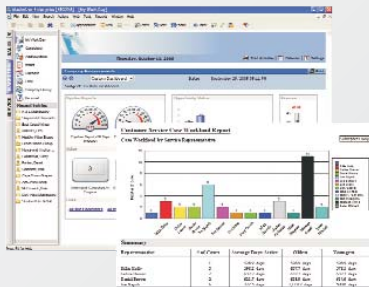
#### Move Up to Maximizer Enterprise™ for Customer Relationship Management

As your business grows, small and mid-sized businesses need to streamline processes and improve communications to attract more profitable prospects, increase sales and retain loyal customers. To grow your business and continue to service your existing customers effectively, you need a complete Customer Relationship Management (CRM) solution like Maximizer Enterprise.

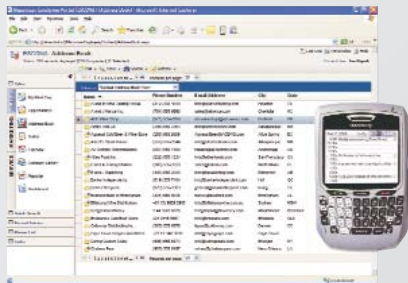
In addition to the contact and schedule management capabilities of Maximizer, this flexible CRM solution integrates Marketing, Sales and Customer Service & Support in one powerful, integrated suite to support advanced sales collaboration & forecasting, automated marketing campaigns and customer service tracking. Maximizer Enterprise also enables remote, web and wireless access, advanced business intelligence, process automation, and program customisation.

Migrating from Maximizer or another contact manager to Maximizer Enterprise CRM is easy. Data transfers seamlessly without the need to re-enter information. And since the user-friendly interface is similar in both solutions, users won't have to learn a whole new system. No matter what size your business is, Maximizer Enterprise can help build profitable customer relationships that will drive your company's long-term success. In addition to managing contacts, Maximizer Enterprise enables companies to:

- Implement your own email marketing campaigns, monitor results, and integrate them with your website and customer records.
- Assign leads to your sales people or distribution partners and collaborate as a team.
- Track customer service incidents and share the details with your team at any time.
- Provide users with remote synchronisation, web access, or PDA access, including Windows Mobile, Palm and BlackBerry handheld devices.
- Visualise real-time metrics through Executive Dashboards and easily generate reports on your sales forecast & pipeline, marketing campaigns, lead status and customer service cases.
- Increase productivity by automating workflow, lead assignment, and other critical business processes.
- View complete customer information through one interface by customising and integrating your solution with other critical business applications.



**Customer Relationship Management:**  
With Maximizer Enterprise, manage relationships with customers through marketing, sales and customer service, plus gain the insight you need to drive your business to success.



**Customer Relationships On Demand:**  
With Maximizer Enterprise, get on demand access to customer information – from your desk, through remote synchronisation, through the web, or a PDA.

## Maximizer Enterprise Continuously Makes Improvements

| USER FEATURES                                                                                  | Maximizer Enterprise 9.5 eCRM | Maximizer Enterprise 9.5 CRM | Maximizer 9 |
|------------------------------------------------------------------------------------------------|-------------------------------|------------------------------|-------------|
| <b>Sales</b>                                                                                   |                               |                              |             |
| Sales Executive Dashboard                                                                      | ✓                             |                              |             |
| Sales funnel reports                                                                           | ✓                             | ✓                            | ✓           |
| Lead summary reports                                                                           | ✓                             | ✓                            |             |
| Opportunity analysis & sales pipeline reports                                                  | ✓                             | ✓(SQL only)                  |             |
| Real-time alerts include lead status alerts, changed forecast, and won/lost deals <sup>2</sup> | ✓                             | ✓<br>(some in SQL only)      |             |
| Partner Relationship Management <sup>1</sup>                                                   | ✓                             |                              |             |
| Lead Management and routing                                                                    | ✓                             | ✓                            |             |
| Sales Action Plans                                                                             | ✓                             | ✓                            | ✓           |
| Interactive Organisational charts                                                              | ✓                             | ✓                            |             |
| Sales process methodology                                                                      | ✓                             | ✓                            |             |
| Opportunity Management                                                                         | Advanced                      | Advanced                     | Basic       |
| Account Management                                                                             | ✓                             | ✓                            | ✓           |
| <b>Marketing</b>                                                                               |                               |                              |             |
| Email campaign respondent lists                                                                | ✓                             | ✓                            |             |
| Campaign ROI calculator                                                                        | ✓                             | ✓                            |             |
| Lead Summary reports                                                                           | ✓                             | ✓                            |             |
| Real-time alerts include lead status alerts, suspended & late campaigns. <sup>2</sup>          | ✓                             | ✓<br>(some in SQL only)      |             |
| Marketing Action Plans (Project Management)                                                    | ✓                             | ✓                            |             |
| Automatic Email Campaigns                                                                      | ✓                             | ✓                            |             |
| Automatic fax and print campaigns                                                              | ✓                             | ✓                            |             |
| Campaign Management                                                                            | ✓                             | ✓                            |             |
| Automatic campaign subscriber removal**                                                        | ✓                             |                              |             |
| Email monitoring and automatic replies <sup>2</sup>                                            | ✓                             | ✓                            |             |
| Campaign failure alerts                                                                        | ✓                             | ✓                            |             |
| Campaign response metrics                                                                      | ✓                             | ✓                            |             |
| Do-not-solicit enforced by system                                                              | ✓                             | ✓                            |             |
| 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                                                      | ✓                             | ✓                            |             |
| Real-time alerts include case overload, overdue cases, and status changes <sup>2</sup>         | ✓                             | ✓                            |             |
| Case management (routing, queuing)                                                             | ✓                             | ✓                            |             |
| Case resolution                                                                                | ✓                             | ✓                            |             |
| Case creation based on income email                                                            | ✓                             | ✓                            |             |
| Email monitoring and automatic replies <sup>2</sup>                                            | ✓                             | ✓                            |             |
| Knowledge Base                                                                                 | ✓                             | ✓                            |             |
| Service billing                                                                                | ✓                             | ✓                            |             |
| Customer self-service <sup>1</sup>                                                             | ✓                             |                              |             |
| <b>General</b>                                                                                 |                               |                              |             |
| Customer & Prospect Action Plans                                                               | ✓                             | ✓                            | ✓           |
| Key user-defined fields                                                                        | ✓                             | ✓                            | ✓           |
| Categorised and multi-level user-defined fields                                                | ✓                             | ✓                            | ✓           |
| Mandatory fields                                                                               | ✓                             | ✓                            | ✓           |
| My Work Day (personnel page)                                                                   | ✓                             | ✓                            | ✓           |
| My Work Day with company announcement                                                          | ✓                             | ✓                            |             |
| Email, Task & Calender integration with Outlook                                                | ✓                             | ✓                            | ✓           |
| Email, Task & Calender integration with Exchange Server                                        | ✓(Add-on)                     | ✓(Add-on)                    |             |
| Maximizer Toolbar in Outlook                                                                   | ✓                             | ✓                            |             |
| Accounting Link for Quickbooks                                                                 | ✓(Add-on)                     | ✓(Add-on)                    | ✓(Add-on)   |
| Calender                                                                                       | ✓                             | ✓                            | ✓           |
| Activity and task management                                                                   | ✓                             | ✓                            | ✓           |
| Company Library                                                                                | ✓                             | ✓                            | ✓           |
| Extensive customisation views                                                                  | ✓                             | ✓                            | ✓           |
| Import/export in standard formats                                                              | ✓                             | ✓                            | ✓           |
| Letters, faxes with merge fields                                                               | ✓                             | ✓                            | ✓           |
| Support for HTML email                                                                         | ✓                             | ✓                            | ✓           |

|                                                                    | eCRM                                                    | CRM                                        | Maximizer 9                                |
|--------------------------------------------------------------------|---------------------------------------------------------|--------------------------------------------|--------------------------------------------|
| Industry Packs                                                     | ✓                                                       | ✓                                          | ✓                                          |
| <b>Business Intelligence</b>                                       |                                                         |                                            |                                            |
| Executive Dashboard with Crystal Reports drill-down                | ✓                                                       |                                            |                                            |
| Advanced report customisation with Crystal Reports                 | ✓                                                       | ✓                                          | ✓                                          |
| Out-of-the-box, pre-formatted reports                              | ✓                                                       | ✓                                          | ✓                                          |
| Supports Crystal Reports Server                                    | ✓                                                       | ✓(Add-on)                                  |                                            |
| Supports for Crystal Analysis                                      | ✓                                                       | ✓                                          |                                            |
| <b>Workflow Automation &amp; Process Mangement</b>                 |                                                         |                                            |                                            |
| Business Process automation                                        | ✓                                                       | ✓                                          |                                            |
| Business activity monitoring                                       | ✓                                                       | ✓                                          |                                            |
| Automatic report distribution                                      | ✓                                                       | ✓                                          |                                            |
| Email monitoring and response                                      | ✓                                                       | ✓                                          |                                            |
| <b>On Demand Access</b>                                            |                                                         |                                            |                                            |
| Windows Mobile Access                                              | synchronisation with MaxMobile, Outlook or wireless web | synchronisation with MaxMobile, or Outlook | synchronisation with MaxMobile, or Outlook |
| Palm OS synchronisation                                            | ✓                                                       | ✓                                          | ✓                                          |
| Blackberry access                                                  | synchronisation with MaxMobile, or Outlook              | synchronisation with MaxMobile, or Outlook | synchronisation with MaxMobile, or Outlook |
| Wireless Portal (Wireless Web Access)                              | ✓                                                       |                                            |                                            |
| Employee Portal (Web Access)                                       | ✓                                                       |                                            |                                            |
| Remote synchronisation                                             | ✓                                                       | ✓                                          |                                            |
| <b>eCommerce, Order Management</b>                                 | ✓                                                       | ✓                                          |                                            |
| Order Management                                                   | ✓                                                       | ✓                                          | ✓                                          |
| eCommerce site ceation                                             | ✓                                                       | ✓                                          | ✓                                          |
| Credit card processing                                             | ✓                                                       | ✓                                          | ✓                                          |
| Product catalog                                                    | ✓                                                       | ✓                                          | ✓                                          |
| Customer online order tracking                                     | ✓                                                       |                                            |                                            |
| <b>Administration &amp; Security</b>                               | ✓                                                       | ✓                                          |                                            |
| Support for Microsoft SMS                                          | ✓                                                       | ✓                                          |                                            |
| Live Update                                                        | ✓                                                       | ✓                                          | ✓                                          |
| Database format                                                    | Microsoft SQL                                           | Microsoft SQL, Pervasive                   | Pervasive                                  |
| Network configuration                                              | Client-Server                                           | Client-Server or Peer-toPeer Workgroup     | Single User or Peer-toPeer Workgroup       |
| #Users                                                             | 5+ users                                                | Client-Server: 5+ Workgroup:1-15           | 1-10 users                                 |
| 128-bit cipher public key encryption                               | ✓                                                       | ✓                                          | ✓                                          |
| Full & Read-Only access settings                                   | ✓                                                       | ✓                                          | ✓                                          |
| Role based security groups                                         | ✓                                                       | ✓                                          | ✓                                          |
| <b>Customisation</b>                                               | ✓                                                       | ✓                                          |                                            |
| Customisation Suite with ODBC tools, hooks & triggers, sample code | ✓                                                       | ✓                                          |                                            |
| Desktop program customisation                                      | ✓                                                       | ✓                                          |                                            |
| Customise web client (Employee Portal)                             | ✓                                                       |                                            |                                            |
| Customise Partner and Customer Portals                             | ✓                                                       |                                            |                                            |
| Direct SQL updates                                                 | ✓                                                       |                                            |                                            |
| Integration with other applications                                | ✓                                                       | ✓                                          |                                            |
| Integration with Internet & Intranet                               | ✓                                                       | ✓                                          |                                            |
| Advanced Customisation Suite with Accounting API                   | ✓                                                       | ✓                                          |                                            |
| <b>Microsoft Technology Support &amp; Integration</b>              |                                                         |                                            |                                            |
| Works with Excel                                                   | ✓                                                       | ✓                                          | ✓                                          |
| Works with Word                                                    | ✓                                                       | ✓                                          | ✓                                          |
| Works with Outlook                                                 | ✓                                                       | ✓                                          |                                            |
| Works with FrontPage                                               | ✓                                                       | ✓                                          |                                            |
| Works with Exchange                                                | ✓(Add-on)                                               | ✓(Add-on)                                  |                                            |
| Support for SMS for installation                                   | ✓                                                       | ✓                                          |                                            |
| Built for .NET framework                                           | ✓                                                       | ✓                                          |                                            |
| Support for SQL Database                                           | ✓                                                       | ✓(SQL version)                             |                                            |
| Integrates with Microsoft Live Local                               | ✓                                                       | ✓                                          | ✓                                          |
| Vista, Office, and Internet Explorer 7 ready                       | ✓                                                       | ✓                                          |                                            |

\*Requires Workflow Automation, powered by KnowledgeSync.



Standard modules included in Maximizer Enterprise eCRM & CRM Suite:

- Maximizer Enterprise Sales, Marketing, Customer Service & Support client software (one integrated application)
- Maximizer Enterprise server software
- Crystal Reports XI Professional (bundled with each client license)
- MaxExchange remote synchronisation client software
- MaxExchange remote synchronisation server software
- Maximizer Link licenses for Palm handheld device synchronisation (same number as desktop client licenses included)
- ecBuilder Lite (Pervasive) or estore Manager(SQL suites)

Standard modules in Maximizer Enterprise eCRM suite (in addition to above)

- Employee Portal licenses (same number as desktop client licenses included; additional licenses available as an add-on)
- Wireless Employee Portal licenses (same number as desktop client licenses included; additional licenses available as an add-on with Employee Portal)
- Customer Portal (unlimited licenses)
- eStore Manager

Extras:

- Accounting Link for Use with QuickBooks
- Partner Portal (eCRM only)
- Workflow Automation software (various configurations available: Corporate, Basic, Lite)
- MaxSync for Microsoft Exchange
- CRM Customization Suite eCRM Customization Suite
- Advanced Customization Suite
- Crystal Reports Server
- Crystal Analysis

Licenses for Pervasive or Microsoft SQL database licenses maybe required if you do not have site licenses for these.



## 9 Reasons that make Maximizer Enterprise Better.

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook®, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer management software

## For More Information

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### Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will out perform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

### About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

### Maximizer Enterprise works with technology from the following partners



### Awards



Authorised Maximizer Partner

**Maximizer**  
The CRM Company [www.max.co.uk](http://www.max.co.uk)

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