



# What's New in Maximizer Enterprise™ 9 & 9.5

Raising the bar for high-performance sales, marketing, and service

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Maximizer Enterprise is the proven, award-winning and flexible way to attract prospects, win new customers, and increase repeat business. Still at an affordable price.

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Maximizer Enterprise 9.5 builds on the proven Maximizer Enterprise 9 solution and gives you more ways to work the way you want. Whether you use your desktop at the office or the Internet on the road; Windows Mobile, Palm or BlackBerry devices; or Outlook as your main gateway - Maximizer Enterprise is the proven, award-winning and flexible way to attract prospects, win new customers, and increase repeat business. Still at an affordable price.

Here's what's new in Maximizer Enterprise 9 & 9.5:

- Business Intelligence and Process Management Improvements for Managers
- Productivity Enhancements to Accelerate Staff Performance
- Administration, Integration, and Customisation Advancements for IT Professionals
- Security Advancements for your Company

To compare your version to the latest features, see Pages 5 & 6 for a full feature comparison check list.

## Manage Business Performance & Create Predictable Success

With the world standard in reporting - Crystal Reports XI Professional - plus a Dashboard and over 175 reports included with Maximizer Enterprise 9.5, it's now even easier for managers and executives to gain accurate insights into their company's operational performance.

- Visualise business drivers and make better decisions faster with an improved Executive Dashboard integrated with Crystal Reports for drill-down to detailed information.
- Take advantage of pre-formatted, standard reports to save time and reduce the effort it takes to compile detailed operational data - includes sales pipeline funnel, lead status, case monitoring and more!
- Instantly export data from reports or column views to Microsoft Excel for further manipulation and analysis.

## Maximizer Enterprise 9.5 helps non-technical people rapidly model successful business processes.

- Easily configure Workflow Automations without time-consuming customisation: manage performance metrics, operational policies and business processes.
- Now speed up process automation with NEW Workflow Automation alerts & processes, including automatic campaign removal and alerts for leads not followed up in a timely manner.
- These are in addition to automation and alerts already included, such as general email inbox monitoring, real-time lost/suspended opportunity alerts, changed sales forecast alerts, case overload and follow-up alerts - giving managers the insight needed to effectively monitor the things that are important to your business.

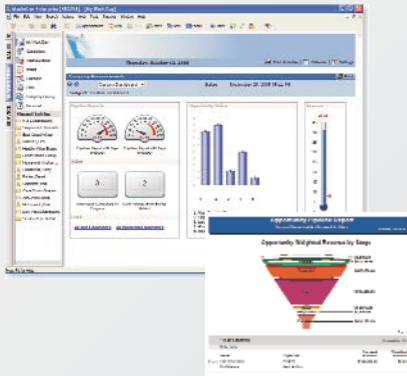


## Accelerate Productivity

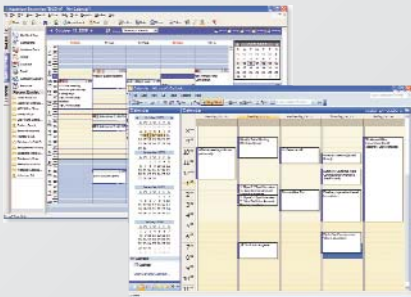
Maximizer Enterprise 9.5 includes many usability improvements - from user interface re-engineering and a direct Outlook interface, to more web & wireless mobility options - helping you accelerate productivity by ensuring staff can work the way they want.

### Productivity Improvements for Staff

- With on demand access, get up-to-the-minute information, including customer details, sales forecasts, your list of deals or your appointments - whatever you need from Maximizer Enterprise - from anywhere. Experience the same look and feel of Maximizer Enterprise through the web or through the desktop interface with increased functionality through the web.
- Whether you use a Windows Mobile, Palm, or BlackBerry device - get your critical customer information while you're on the road. NEW MaxMobile let's you install the software on your Windows Mobile device and synchronise updates back to the corporate database. If you're using the latest Palm OS device - MaxLink works with the existing modules on your Palm for a quick synch. And if you use a BlackBerry or other wireless web device, simply login online to get real-time access to customer information through the Wireless Portal.
- Use Maximizer Enterprise with the products you already use in your business. As a Microsoft Gold Certified Partner, we've built in tight integration with Microsoft Word for personalised letters, FrontPage for rich HTML email campaign content, and Excel for data exporting and analysis. Plus, when you're ready for Office 2007, so is Maximizer Enterprise 9.5.
- Take advantage of NEW automatic two-way synchronisation of contacts, tasks and calendars with Outlook.
- Give your staff CRM functionality right in Outlook with the NEW Maximizer Toolbar for Outlook. One click let's you save emails from Outlook directly to their Maximizer Enterprise record, create a new contact based on the sender's information, or simply view the contact's record in Maximizer Enterprise.
- Maximizer Enterprise' email window, which you can integrate with Outlook or other email applications like Lotus Notes and GroupWise - now let's you use the popular preview pane for easier scanning of messages.
- Now collaborate and book meetings with non-Maximizer Enterprise users with the NEW integration with Microsoft Exchange.
- Personalise "My Work Day" for user groups based on role so people in your organisation automatically get information that's important to them - including key performance measurements - delivered to their home page.
- With NEW centralised user-defined fields, easily view and update Address Book entry fields through the Contacts, Opportunities and Cases for one-click access to the information you really need. This enables you to view company profile and lead qualification details when working on a sales opportunity.
- Edit user-defined fields on the fly with NEW in-line editing for faster data entry.
- More spell-checking options; printing directly from within a Note; more flexibility to set your work day hours in the Calendar; emailing multiple documents from the Company Library; searching in the Company Library by file name, author, and more.



**Business Intelligence & CRM:** Transform customer data into meaningful information with improved Executive Dashboards and more Crystal Reports



**Microsoft Outlook & Exchange Server Integration:** Share contacts and calendars with two-way Outlook synchronisation and collaborate with non-Maximizer Enterprise users with Exchange Server integration

### Productivity Improvements for Sales

- Exploit the most flexible and powerful Opportunity Manager on the market today to implement sophisticated sales methodologies - now with more flexibility to change sales strategies at any point in the sales cycle.
- Opportunity Manager now supports multiple currencies for global sales teams.
- Sales teams and territories change, so Maximizer Enterprise gives you the power to re-assign leads, accounts, tasks, and opportunities quickly to the right sales representative.
- Use NEW Action Plans to manage a series of standard tasks for sales processes and marketing projects - even assign tasks to multiple people, complete with alarm reminders to ensure nothing is forgotten.
- Take advantage of many NEW reports - from the Opportunity Pipeline Funnel and Lead Summary to Case Resolution - to track sales performance and identify areas for improvement.
- Now you can follow-up effectively with your prospects who responded to email campaigns: quickly get a list of people who viewed the email and those who clicked-through to a web page.

- Use the NEW interactive organisational chart to visualise who's who in your prospect's organisation, and make updates with a simple drag and drop.
- Designate a key decision-maker and other influencers and identify their roles in the sale.
- Create a default, pre-populated form for rapid entry of new opportunities; and search opportunities by partner or competitor in the deal to find information faster.
- Plan your travel days more effectively using NEW integration with Microsoft Virtual Earth for global maps and directions.
- Get partners and employees collaborating more effectively with improved, customisable Portals. Partners can now update leads and sales forecasts in real-time, to give you greater insight into partner activities.

### Productivity Improvements for Marketing

- Gain insight into where your budget is best spent with the NEW automatic Campaign ROI Calculator.
- Close the loop on your campaigns and see greater ROI by easily retrieving a list of email campaign respondents by those who opened emails, and those who clicked-through on your landing pages - and provide those lists to sales for follow-up.
- Manage marketing projects and ensure the team is on track to meet deadlines with NEW Action Plans: assign tasks and link project resources and personnel through a central interface.
- Enjoy greater flexibility and improve communications by using Microsoft Word for formatting, colour and font enhancements for your rich text print, fax and email campaigns, and Microsoft FrontPage or any other web application for your rich HTML email campaigns.

### Productivity Improvements for Customer Service & Support

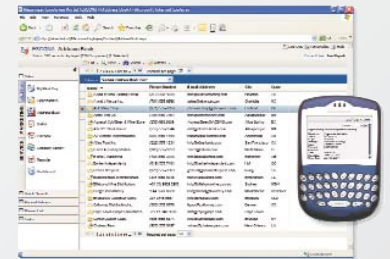
- Save data entry time with NEW ability to create a case directly from an incoming email - it automatically matches the sender to its record in Maximizer Enterprise and uses the body of the message in the case description.
- Increase call productivity with enhanced Computer Telephony Integration (CTI) configuration to enable automatic caller identification and dialing.
- Let your service representatives benefit from a streamlined interface that includes tabs for Customer Service Case details, key fields, and the ability to perform global editing for mass updating or reassigning.
- Use the NEW Case Billing and Case Monitoring reports to ensure every case is promptly handled.
- Decrease the time it takes to resolve cases with improved access to solution notes and article details stored in the Knowledge Base.

### Deploy Quickly then Customise based on your Business Demands

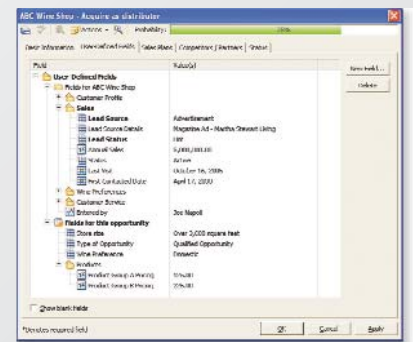
System administrators will appreciate the many new time-saving features built into Maximizer Enterprise 9.5 to help you configure and deploy quickly. Plus, IT professionals now have even more control and flexibility to customise the application to match your unique business processes.

### Configure & Deploy Quickly

- Easily create and distribute unique data entry windows by assigning key user-defined fields for different groups without any programming.
- Expanded role-based security permits faster set-up and easier group administration for departmental settings and views for areas such as "Work Day" home page, key fields, document templates, and Favorite Lists.
- Industry Packs help you get up and running faster with built-in process automation based on best practices specific to your industry, including fields, data views, Action Plans, sales processes, document templates, and macros.
- Noted for being the fastest to deploy in its class, Maximizer Enterprise now makes deployment and upgrades even faster and easier with improved support for the Microsoft Systems Management Server (SMS).
- Administrator-controlled Live Update enables IT administrators to download service releases and fixes and control the automatic installation to workstations.
- Maximizer Enterprise now supports Microsoft SQL 2005 Workgroup, Standard, and Enterprise editions.



**On Demand Access:** Get up-to-date CRM information from your desk, through the web, or on your handheld or smart phone device.

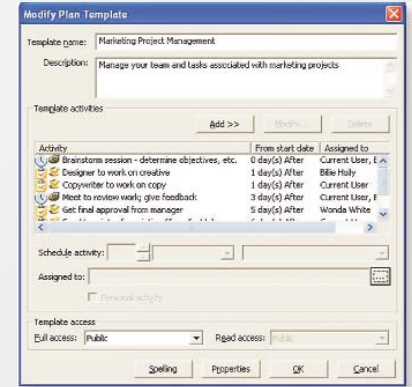


**Centrised User-Defined Fields:** Now view company and contact user-defined fields directly from Opportunities and Cases for one-click access to information.



## Maximizer Enterprise Continuously Makes Improvements

USER FEATURES	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8	Maximizer Enterprise 7/7.5	Maximizer Enterprise 6.0	Maximizer Enterprise 5.x
<b>Sales</b>					
Sales Executive Dashboard	New				
Sales funnel reports	New				
Lead summary reports	New				
Opportunity analysis & sales pipeline reports	Improved	✓			
Sales action plans	New				
Interactive Organisational charts	New in 9.5				
Opportunity Management	Improved	✓	✓	✓	✓
Sales process methodology	Improved	✓	✓	✓	✓
Real-time alerts (out of the box) include lead status alerts, changed forecast, and won/lost deals <sup>2</sup>	Improved	✓			
Account Management	Improved	✓	✓	✓	✓
Partner Relationship Management <sup>1</sup>	Improved	✓	✓		
Lead Management and routing	✓	✓			
Sales Forecasting	✓	✓			
<b>Marketing</b>					
Email campaign respondent lists	New in 9.5				
Campaign ROI calculator	New				
Lead Summary reports	New				
Marketing Action Plans (Project Management)	New				
Automatic campaign subscriber removal <sup>**</sup>	New				
Real-time alerts (out of the box) include lead status alerts, suspended & late campaigns. <sup>2</sup>	Improved	✓			
Automatic Email Campaigns	Improved	✓	✓		
Automatic fax and print campaigns	Improved	✓	✓		
Campaign Management	Improved	✓	✓		
Campaign response metrics	✓	✓			
Do-not-solicit enforced by system	✓	✓			
Email monitoring and automatic replies <sup>2</sup>	✓	✓			
Campaign failure alerts	✓	✓			
Lead capture from website	✓	✓	✓		
Customer segmenting with user fields	✓	✓	✓	✓	✓
List management	✓	✓	✓	✓	✓
<b>Customer Service &amp; Support</b>					
Customer Service Executive Dashboard	New				
Overdue case, case billing, other reports	Improved				
Case creation based on incoming email	New in 9.5				
Case management (routing, queuing)	Improved	✓	v7.5 only		
Case resolution	Improved	✓	v7.5 only		
Knowledge base	Improved	✓	v7.5 only		
Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes <sup>2</sup>	✓	✓			
Email monitoring and automatic replies <sup>2</sup>	✓	✓			
Service billing	✓	✓			
Customer self-service <sup>1</sup>	✓	✓	✓		
<b>General</b>					
Customer & Prospect Action Plans	New				
Key user-defined fields	Improved	✓			
Categorised and multi-level user-defined fields	Improved	✓			
Mandatory fields	Improved	✓	✓		
My Work Day (customisable home page)	Improved	✓			
Email, Task & Calendar integration with Outlook	Improved in 9.5	✓	✓		
Email, Task & Calendar integration with Exchange	New				



**Action Plans:** Whether you use a sophisticated sales methodology or a straightforward sales process, use Strategies and Action Plans to implement sales best practices.



USER FEATURES	v9/9.5	v8	v7/7.5	v6.0	v5
Maximizer Toolbar in Outlook	<b>New in 9.5</b>				
Import/Export in standard formats	<b>Improved</b>	✓	✓	✓	✓
Support for HTML email	<b>Improved</b>	✓			
Industry Packs for High-Tech, Legal, Financial, Real Estate	<b>Improved</b>	✓	✓	✓	✓
Accounting Link for QuickBooks	✓	✓			
Database searching with multiple criteria	✓	✓			
Calendar for multi-user viewing	✓	✓			
Calendar with resource & location management	✓	✓			
Task management	✓	✓	✓	✓	✓
Company library for document sharing	✓	✓	✓	✓	✓
Letter, faxes with merge fields	✓	✓	✓	✓	✓
Extensive customisation views	✓	✓	✓	✓	✓
<b>Business Intelligence</b>					
Advanced report customisation with Crystal Reports	<b>Improved</b> (XI Professional)	✓			
Executive Dashboard <sup>1</sup>	<b>Improved</b>	✓	✓		
Out-of-the-box, pre-formatted reports	<b>Improved</b>	✓	✓	✓	✓
Supports Crystal Reports Server <sup>6</sup>	<b>New</b>				
Support for Crystal Analysis <sup>®</sup>	✓	✓			
<b>Workflow Automation</b>					
Business process automation <sup>2</sup>	<b>Improved</b>	✓			
Business activity monitoring & alerting <sup>2</sup>	<b>Improved</b>	✓			
Automatic report distribution	✓	✓			
Email monitoring and response <sup>2</sup>	✓	✓			
<b>On Demand Access</b>					
Windows Mobile <sup>®</sup>	<b>New in 9.5</b>				
Palm synchronisation	✓	✓	✓	✓	✓
Blackberry access (synchronise through Outlook or access through wireless web*)	✓	✓			
Wireless Portal (Wireless Web Access) <sup>1</sup>	<b>Improved</b>	✓	✓		
Employee Portal (Web Access) <sup>1</sup>	<b>Improved</b>	✓	✓		
Remote Synchronisation	<b>Improved</b>	✓	✓	✓	✓
<b>eCommerce, Order Management</b>					
Order Management	✓	✓			
Customer online order tracking	✓	✓	✓		
eCommerce site creation	✓	✓	✓	✓	
Credit card processing	✓	✓	✓	✓	
Product catalog	✓	✓	✓	✓	
<b>Administration</b>					
Support for Microsoft SMS for installation	<b>New</b>				
Administrator-controlled Live Update	<b>New</b>				
128-bit cypher public key encryption	<b>Improved</b>	✓	✓		
Full and read only access settings	<b>Improved</b>	✓			
Role-based security groups	<b>Improved</b>	✓	✓	✓	✓
Customisation suite	<b>Improved</b>	✓	✓	✓	✓
Customisation with Accounting API	<b>New</b>				
Choice of database: Microsoft SQL or Pervasive.SQL	<b>Support for SQL 2000</b>	✓	✓		✓
Administration Reports	<b>Improved</b>				
<b>Microsoft<sup>®</sup> Technology Support &amp; Integration</b>					
Works with Exchange	<b>New</b>				
Works with Excel	<b>New</b>				
Works with Word	<b>Improved</b>	✓	✓	✓	✓
Works with Outlook	<b>Improved</b>	✓	✓	✓	✓
Works with FrontPage	✓	✓	✓		
Support for SMS for installation	<b>New</b>				
Built for .Net framework	<b>Improved</b>	✓			
Integrates with Virtual Earth	<b>New</b>				
Support for SQL Database	✓	✓	✓		<b>Only 5.1</b>
Vista, Office 2007, Internet Explorer 7	<b>Ready in 9.5</b>				

<sup>1</sup>Executive Dashboard (with key performance indicators) available only in eCRM Suite.

<sup>2</sup>Requires Workflow Automation, which is an add-on product with additional fees.

<sup>3</sup>MaxLink for Palm OS devices is included with Maximizer Enterprise; MaxMobile is an add-on product with additional fees; Wireless Portal available only in eCRM Suite

<sup>4</sup>Synchronising with Microsoft Exchange Server requires MaxSync for Exchange, which is an add-on product with additional fees.

<sup>5</sup>Requires one of the Customisation Suites, which are an additional fee.

<sup>6</sup>Crystal Reports Server enables creation and delivery of reports over the web, and is an add on product with additional fees.



## 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 outperform 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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